

## **STEP 1**    **The discovery process**

Only by knowing how many computers (desktops, laptops, servers and mobile devices) your organisation has and what software programs (operating systems, applications and fonts) you are running can you determine how to proceed. An accurate inventory can answer questions such as:

- Are you using the most recent/suitable version of the programs needed?
- Can you delete outdated or unnecessary programs?
- Are there any other programs that would make you more productive/efficient?
- Are you making the most of our software investment with volume licencing agreements?
- Are you wasting money on software updates for programs no longer needed?

You do not need to work in IT to complete such an inventory and the BSA has a number of free software audit tools that can help you identify and track licenced and unlicenced software on your computers and networks.

No matter which tools you use, you will need to capture the following information for each copy of software installed on each computer:

- Product name
- Version
- Vendor / Manufacturers
- Department Owner
- Licence Type
- Licence Expiry Date (if applicable)

You should also make an inventory of related materials including:

- Disks, CDs or other storage media used to install the programs on your machines
- Original manuals and documentation
- Licence documentation
- Invoices and proofs of purchase  
(including those for hardware that was sold to you with pre-installed software)

Visit [www.bsa.org](http://www.bsa.org) for a list of free software audit tools to help you compile your inventory.

## **STEP 2 Match your software to your licences**

Once you have completed your inventory, you can start comparing the software installed on your machines against the number of licences you hold. If you identify any illegal software copies you may want to contact an IT reseller specialising in SAM for guidance.

Now you can make informed decisions about which software you want to **keep, upgrade or discard** and ensure that everyone is using the version that is most suitable for your business.

Finally, make a complete list of the software approved for use by your company's employees and **keep this in a safe place** so it can be reviewed regularly.

**Top tip:** If you cannot find your receipts for the software you have licenced, contact your software reseller who may be able to assist.

## **STEP 3 Review your policies and procedures**

Now that you have established what you have and what you need, it is vital to maintain accurate records in the form of:

- Hardware asset register
- Software asset register
- Licence register

Depending on the size and complexity of your business, your company's licencing position will be subject to change, perhaps frequently. There are asset management companies that can offer expert advice with fully managed and integrated solutions that ensure records are kept up-to-date with full status reporting.

**Top tip:** You may wish to consider 'locking' your users' PCs to prevent employees from installing software.

## **STEP 4 Develop a Software Asset Management (SAM) action plan**

Once you are managing your software effectively, you need to keep it that way! Regular checks on individual PCs, cross-checked against your three registers and individual profiles, will help you stay on top of things.

If your business environment is complex or rapidly expanding, you may want to take advantage of **server-based monitoring tools** that can automatically poll users' PCs and laptops at scheduled intervals. These tools will generate exception reports that will draw to your attention any instances of **illegal or non-approved software** being introduced to an individual machine or network.

For smaller companies, asset management companies offer remote management solutions to help you maintain visibility on an ongoing basis.

For more in-depth information about the advantages of becoming licence compliant, look at the BSA SAM advantage guide: [www.bsa.org](http://www.bsa.org)