

# Future developments – Universal software asset tag

By David Dery

## **ISO/IEC 19770-2 SAM TAG**

**Standardization of the software asset tag**

# Agenda

## Defining a SAM Tag:

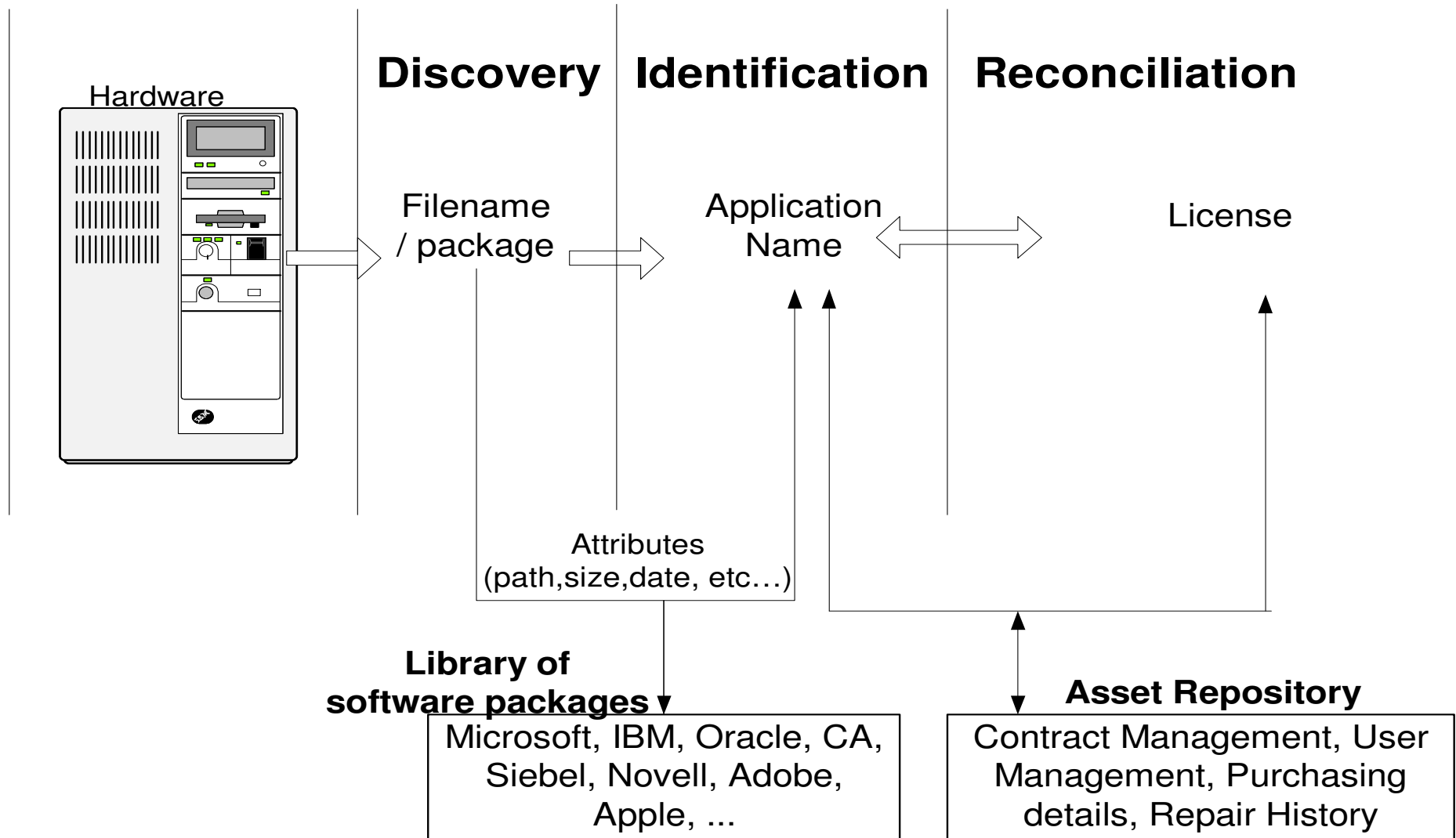
- SAM tools
- Managing Software assets from start to end.
- Scope of the SAM Tag.
- A framework to gather consensus
- Conclusion.

# SAM tools: current situation

## Current situation:

- Many SAM tools vendors
  - Business Software Alliance (BSA) lists 78 vendors,
  - Microsoft's SAM website: over 145 vendors and consultants.
- Several proprietary discovery and identification schemes:
  - Some require subscription in order to continuously identify software assets.
- Software discovery results may vary:
  - A different tool may generate a different list of identified software.
  - If the same tool generates a different list: there is volatility in the inventory.
- No standards on how to identify a software (binary file size or date, registry , directory path, ...)

# SAM tools Functionalities.



# SAM tools Functionalities.

## **Many tasks are performed by SAM tools:**

- Inventory (software discovery)
- Inventory (software identification)
- Asset Repository (Contract Management, User Management, Purchasing details, Repair History)
- Physical software inventory to paper inventory reconciliation (Licensing entitlement reconciliation )
- Usage tracking
- Interaction with other tools (Service Desk, Finance,...)
- Reporting

# Managing Software assets from start to end.

## The need to manage from acquisition through disposal :

- ISO/IEC 19770-1 SAM processes (May 2006):
  - Start with the control environment (Corporate governance)
  - Defines Inventory processes (Identification, inventory, control)
  - Defines Verification and compliance processes (record verification, security compliance, conformance)
  - And ends with the retirement process.

# The scope of the SAM TAG

## Should the software asset TAG follow each stage?

- If it is static, it is just a set of defined field labels and content
- If it captures changes, it will have a structure
- If it plays a role in controlling the usage of the software then it becomes a model.

Purpose	Nature of TAG	Allows
To identify the software	Static fields	Define labels and content of fields
To track changes over time	Structured fields	Allow the concept of baseline and history of changes
To control instalment and usage of software	Model	Privileges with access and execution rights

# The scope of the SAM TAG

## Viewpoints of the SAM TAG :

- **Purchasing** is interested in anything that is subject to an invoice:
  - Fonts
  - Graphics/ pictures
  - Data libraries
  - Source code
- **IT operations** is more concerned with controlling and monitoring operations:
  - Controlling access and instalment of software (security)
  - Controlling and monitoring execution privileges

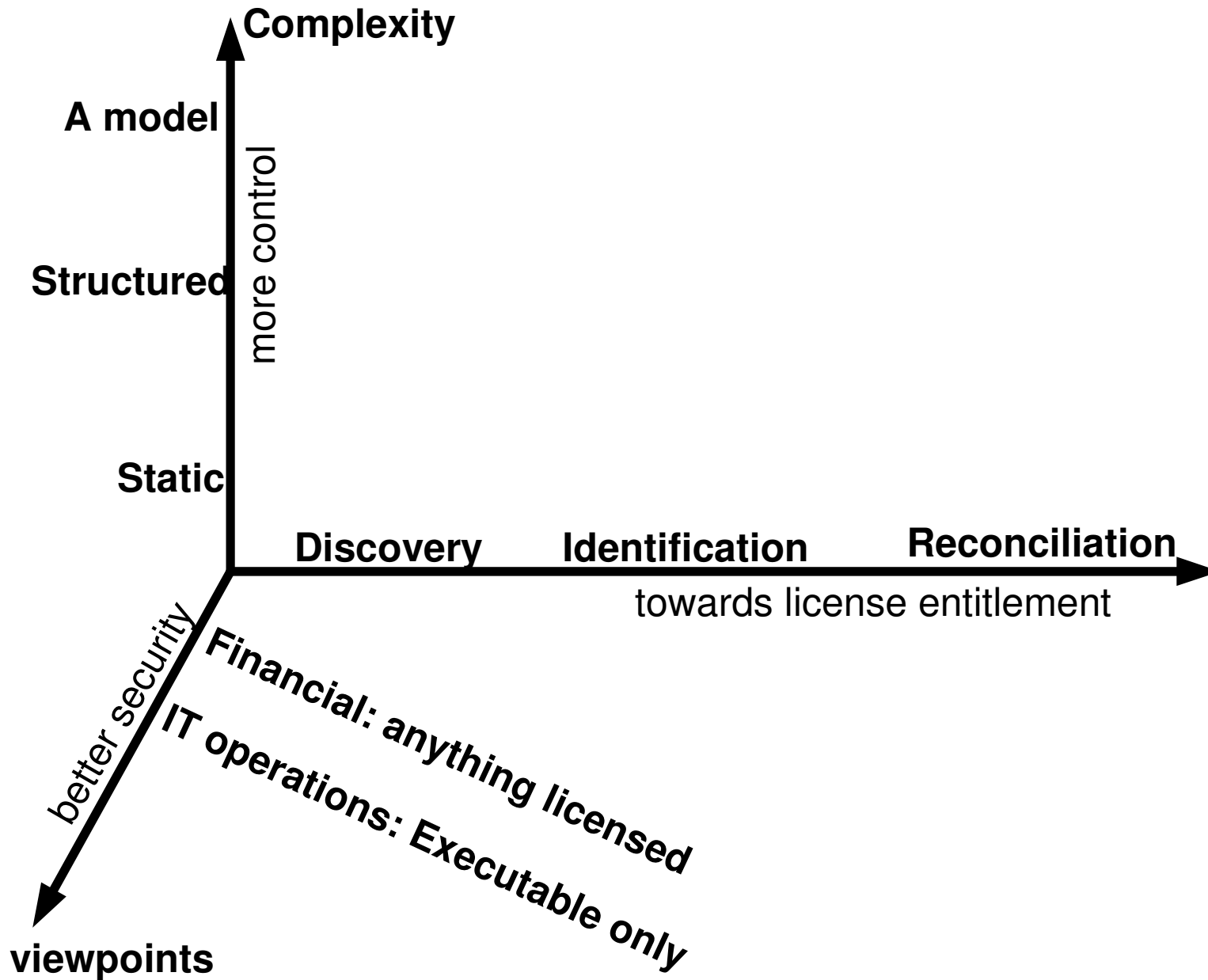


# The scope of the SAM TAG

## 3 dimensions of the SAM TAG:

- The TAG can cover:
  - Software discovery
  - Software identification
  - Licensing reconciliation (or licensing entitlement)
- The TAG can vary in complexity:
  - From static (defined set of labels and content)
  - To structured (dynamic)
  - To a model (control mechanisms and rules)
- TAG viewpoints:
  - Financial: executable and non-executable (anything licensed)
  - IT operations: Executable only (access control and privileges)

# The scope of the SAM TAG



# The scope of the SAM TAG

## How to narrow the scope of the SAM TAG?

- List and prioritize end-user requirements:
  - What requires the most effort
  - What would generate the most benefits
- Identify what software manufacturers are able and willing to do:
  - Consider manufacturer constraints and interests
  - Consider plans and trends in the industry
- Work towards a consensus:
  - Continue industry consultation
  - Work within the ISO framework

# Some end-users requirements

## Problems to be prioritized :

- Simplify the discovery and identification techniques:
  - they can be rather complex:
  - sometime based on proprietary library: lock users in a subscription model.
- Reduce shelfware:
  - unused software is money wasted
  - Tracking of underused or overused needs improvement.
- The needs for better tracking of software over time:
  - Bundling and unbundling of packages makes it harder to track
  - The same product can change name, file signature and/or other characteristics.

# Some end-users requirements

## Problems to be prioritized :

- Provide a definition of unused software that is easier to track and implement:
  - opened window,
  - open windowed with activity from keyboard;
    - Exceptions such as windows for rendering...
- Bring better uniformity in vocabulary and concepts used by different SAM tool vendors.
- Help reduce volatility in the SAM inventory.

# Software manufacturer concerns

## Concerns to be prioritized:

- Anti-Trust laws in the US: software companies cannot appear to be colluding together: this makes common licensing more difficult
- SAM under a virtualised environments and web deployed products.
- Most voluntary compliance initiatives fail.
- Increased need for security with the use of the Internet.
- Better need to control the removal of software:
  - Leave a trace but avoid being discovered by tools.

# Conclusion

- The ISO JTC1/SC7 working group 21 is just starting the initiative and needs to confirm the scope and purpose of the SAM TAG
  - this include working with goals from financial and technical viewpoints
  - Different complexity dimension (from static fields to a model)
  - and reconcile these views in order to obtain consensus from the industry.
- More industry consultation is needed:
  - From TAG end-users
  - From software manufacturers
- The scope of ISO/IEC 19770-2 will be defined during the current year.

# Questions?



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