



ITMC Lifecycle™

Complete lifecycle management for ALL assets and licenses

Lifecycle management is the process of tracking every aspect of owning an asset or license, from its initial acquisition until disposition. A centralized lifecycle management repository is essential for effective and actionable cost management and reporting, trend analysis and budget planning, process workflow management and automation, and much more.

Many organizations attempt to perform lifecycle management functions in their IT Service Management (ITSM) tools or CMDBs, but these tools are not intended to track data at the level of detail necessary for true lifecycle management. Software Asset Management (SAM) tools are also not designed for thorough lifecycle management for all asset types. You will not get an accurate and complete ownership summary using these solutions, and it will limit your ability to maximize the value that you receive from assets and optimize your costs.

True lifecycle management requires the ability to continually track all assets and licenses, whether they are discoverable or not, and even if they are not actively being utilized in your IT environment. A lifecycle management repository provides a constantly available baseline for every asset and license. It is not dependent on dynamic and fleeting discovery scan data that can constantly change.

The Solution

ITMC Lifecycle™ provides comprehensive lifecycle asset management for all assets and licenses, providing continuous tracking from planning and acquisition through refresh and disposition. The data captured in ITMC Lifecycle provides a foundation for many activities including:

- End-user request and approval processes
- Procurement and fulfillment activities
- Software Asset Management (SAM)
- Hardware lifecycle management and disposition
- IT Service Management (ITSM)
- Network and endpoint security
- Automated process workflow activities
- Budgeting and planning, and much more.

The system also provides tracking, reporting and automated alert notifications around contracts and agreements and financial transactions.

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The Authorized Product Catalog

ITMC Lifecycle is centered around a catalog of authorized hardware and software products that have been approved for use in your organization's environment. This catalog provides a level of control over products that enter your IT environment since it supports end user request and approval processes. The catalog offers tracking of:

- Makes, Models, Publishers, Application Names, Versions, Editions
- Product Classifications
- Product Statuses (Planned, Active, Superseded, etc.)
- Part Numbers, Manufacturer Product Codes, and SKUs
- Negotiated Pricing plus lower cost or free alternatives
- Preferred products
- Links to all assets and licenses that are derived from each catalog item
- Internal product owners or managers, and much more.

The ITMC Lifecycle catalog is also where software application details are mapped and tracked to enable accurate license reconciliation and optimization analysis via the Continuous License Reconciliation™ (CLR) modules. Default product use rights are provided for many publishers and products, but these may be edited to reflect any special packages, suites or use rights that your organization has negotiated. This is also where versions can be mapped so that detected installations are rolled up and reported in a manner that is relevant to your organization and its licensing.

Purchase Transaction Tracking

Having instant access to procurement details for your assets and licenses enables more robust reporting and calculations. Purchase transaction records in ITMC Lifecycle are powerful and intuitive, and they mirror the Purchase Order and Line Item format used in real-world procurement activities. Details tracked include:

- P.O. Number, Vendor, P.O. Status and Purchase Date
- P.O. Line Items
- Items purchased via the Catalog or off-catalog and Quantities
- Line Item cost and taxes, and P.O. total cost
- Cost Center, Project and GL Code cost allocations
- Associated Contracts and Agreements
- "Bill To" and "Ship To" information, and much more.



Purchases that are made using Contracts as the primary procurement vehicle can also be tracked, as well as “one-off” purchases via credit card or other method.

Comprehensive Asset and License Tracking

Detailed asset records provide the ability to manage each uniquely identifiable asset or license, or groups of licenses or components that may be tracked together. Asset records may be created automatically using electronic feeds from your vendors, even before the assets or licenses are physically in your facilities. They may also be created manually or by using data from other tools and systems via integration.

The attributes tracked for assets and licenses include:

- High level details about the parent Catalog Item
- Unique identifiers like serial numbers, asset tags, license keys and more
- Current lifecycle status (e.g., Reserved, In Use, In Storage, Disposed, etc.)
- Chargeback cost center(s)
- Assigned physical locations in a detailed hierarchy (e.g., floor, room, rack, shelf, etc.)
- Ownership type (e.g., owned, leased, on loan, subscription, etc.)
- Expected asset function (e.g., production, development lab, application system, etc.)
- Flexible, unlimited user-defined fields
- Links to related assets, users, contracts, P.O. details and much more.

Contract Management

Contracts and License Agreements are a critical element of lifecycle management, as there are often potential financial consequences based on time (e.g., renewals or lease-end returns) or violating terms of use (e.g., license compliance and use rights). ITMC Lifecycle supports detailed tracking of contracts and agreements, as well as their relationships to assets, licenses, organizations and people.

Attributes that can be tracked include:

- Contract Types and Subtypes, with unique attributes, terms and conditions
- Contract Status (e.g., In Draft, Executed, Terminated, etc.)
- Vendor and Start and End Dates (perpetual agreements can also be indicated)
- Associated people from your organization and vendors
- Physical and digital contract locations
- Uploaded documents (e.g., contract PDFs, scanned drafts, notes, etc.)



Contracts can be linked to assets, catalog items, purchase records, employees and more. Automated alerts and notifications can be sent based on dates and many other contract attributes to ensure that important renewal or cancellation dates are not missed.

Financial Tracking

ITMC Lifecycle provides tracking of financial details from multiple perspectives, enabling True Cost of Ownership (TCO) calculations and other financial analysis and reporting.

Costs, payments and chargebacks may be tracked directly against an individual asset, license or contract. These may be one-time payments or a schedule may be created for recurring payments that are made at any interval (annually, quarterly, monthly, etc.). Costs may be tracked in multiple currencies for global organizations. Depreciation can also be tracked and reported against assets and licenses.

A cost center hierarchy enables rollup reporting to any level, from an organizational overview to the most granular department-level query.

A flexible API allows data to be shared bi-directionally with Fixed Asset, Accounts Payable, and other financial systems that are utilized by your organization.

Facility and Location Tracking

ITMC Lifecycle provides the ability to track the assigned location of assets, licenses and people. This identifies where they are supposed to be, and discovery scans can tell you where they actually are. This dual approach helps identify exceptions when things aren't where they are supposed to be. The application provides a high degree of flexibility in defining locations, and it provides integration with facilities management and other systems to automatically maintain locations and their attributes.

Your organization may require some assets to be tracked to a building and address level, and others may be tracked to a floor, room, workspace, rack, or shelf level. A hierarchical structure enables rollup reporting at multiple levels.

Employee Details

Employee data may be tracked to enable the allocation of assets and licenses to people and to support automated process workflows. This data may be shared bi-directionally with Active Directory, LDAP and human resources systems via a flexible open API. Employee titles, locations, organizations, and statuses can be used to support automated requests, approvals and provisioning, employee onboarding and offboarding, asset re-utilization and much more.



Hardware Reconciliation

Hardware reconciliation functionality enables hardware details from ITMC Discovery™ and other inventory tools to be matched against hardware assets in ITMC Lifecycle. It is possible to see:

- Hardware that you own that is not being discovered
- Hardware that was discovered but for which no ownership record exists in ITMC Lifecycle
- Configuration, user and location elements that do not match between the two systems.

Detailed exception reports are provided to support remediation decisions and actions.

Hardware Asset Disposition

Since asset disposition activities can have significant financial and legal implications, proper tracking is essential. ITMC Lifecycle provides end-of-life tracking and management capabilities that no other SAM, ITSM or discovery tool offers.

When a hardware asset is set to be retired, salvaged, returned to a leasing company or other end-of-life state, Disposition fields make it possible to track and report on many important elements:

- Disposition Type (e.g., sold, auctioned, donated, etc.)
- Disposal date
- Any third-party vendors who are involved
- Fees incurred or value recovered from a sale
- Hard drive wiping details (who, when, method) to ensure data security
- Uploads of legal documentation (ownership transfer, certificates of sale or destruction, etc.)

During the process, reports can also be run showing all software that is installed on the hardware that is staged for disposal, with associated licensing and contract information. This helps determine which licenses can be reclaimed for re-use according to the terms of the agreement.

A flexible API enables data to be shared with any disposition management provider. Eracent and Ingram Micro ITAD offer a tightly integrated end-to-end lifecycle management solution.



Alerts and Notifications

ITMC Lifecycle provides alerts and notifications to ensure that activities are completed and critical deadlines are met. Some of the conditions that can trigger alerts include:

- Dates
- Status changes or changes to other field values
- Field values that should have changed within a specified time but did not

The body of alert messages may contain verbiage that is unique to a particular type of alert, and alerts can also contain details that are pulled from associated records. For example, it is possible for an alert to include details about an asset that triggered an alert, as well as attributes about the asset's location, the assigned user, and contracts and costs. This relational perspective makes the alerts extremely useful in many situations.

Automated Workflow

ITMC Lifecycle and the AppStore Plus™ Portal can be used to automate many different ITAM and SAM processes, including:

- End User Requests and Approvals
- License Provisioning and Harvesting
- Asset Receipt
- IMAC Activity
- Contract Renewals
- Hardware Disposition, and many more.

Since ITMC's workflow is based on the proven Microsoft Workflow Foundation platform, many processes may be automated, including interactions that involve other systems.

Integration and Data Sharing

ITMC Lifecycle provides multiple methods for sharing data with other systems. The ITMC™ Open API is very flexible and supports database-to-database interactions that can be scheduled or triggered by specific activities. An import mapping facility enables scheduled or on-demand uploads of flat files or database elements. Its intuitive user interface supports mapping of source data to destination tables and fields and provides detailed data validation and error reporting to ensure data integrity.

To learn more about how ITMC Lifecycle can support your organization, contact Eracent.

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