



NEW!

# Enterprise Software Maintenance Management Tool

# Enterprise SMA Management Tool

## Overview

# Enterprise SMA Management Tool

- **Enterprise SMA management and ordering directly from Niagara Licensing**
- Benefits for channel partners
  - Streamlined process for selling and managing software maintenance
    - Does not require involvement by end-users prior to sales process (Asset Manager account no longer required)
    - Quick-easy import of licenses from project folders or spreadsheet
    - Enables authorized Niagara resellers to manage their portfolio of customers from a single account
    - Quick-easy way to convert a proposal to an order
    - 20% Introductory Discount for proposals with 25 or more licenses - expires December 31, 2022
- Benefits for system owners
  - Sync-up maintenance expiration dates
  - Generous “grace period” upon initial enrollment (up to 364 days/license)

# Enterprise SMA

- Requires at least 5 eligible licenses
  - Licenses may be combined from any number of projects or folders
  - Licenses may be imported from other organizations not in the customer's hierarchy
- Applies up to one year grace period for each enrolled license to allow customers to sync-up maintenance expiration dates
- The grace period only applies once per license
- Proposals are sent up through the channel and purchased by Tridium direct partners.
- The customer cannot submit a 0-dollar proposal at any time.

# Setting up Entitlements for ESMT

## Organization Entitlement

The organization needs to have ESMA Provider Service Access in Niagara Licensing

The screenshot displays the 'Entitlements' section of the Niagara Licensing system. It is divided into three main areas: Portability Access, Brand Access, and Service Access. The Portability Access section shows 'No record available.' The Brand Access section contains a table with one entry for 'Vykon'. The Service Access section contains a table with two entries, 'ESMA Provider' and 'Marketplace Standard', with the 'ESMA Provider' entry highlighted by a red box.

| Brand Name | Brand Status | Expiration  | Order (SO/PO) |
|------------|--------------|-------------|---------------|
| Vykon      | Active       | Mar 31,2022 | F003178449/-  |

| Service Name         | Expiration  | Order (SO/PO) |
|----------------------|-------------|---------------|
| ESMA Provider        | Sep 22,2022 | F003178448/-  |
| Marketplace Standard | Sep 22,2022 | F003178447/-  |

Tridium direct partners will be given the ESMA Provider Service Access. They will have the ability to give this access to their partners that they want to have this ability.

- **User set up and permissions**

Users need to have access to the license service and require read/readX and Write/WriteX Standard Order-Buy permission:

|                             | Read                                | Read X                              | Write                               | Write X                             |
|-----------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Billing Report              | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Replacement Order-NONPC RMA | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Replacement Order-PC        | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| SAP Failed Order            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Standard Order-Buy          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

# Access to the Enterprise SMA Tool

To access the ESMA Tool, log into Niagara Licensing.

Then go to Orders → Enterprise SMA

The screenshot displays the Niagara Licensing web application interface. At the top left is the logo for "niagara licensing". To the right of the logo are navigation links: "Marketplace", "Community", "Software", "University", and "Tridium". Below these links is a navigation bar with dropdown menus for "Organization", "Production", "Products", "Licenses", "Orders", and "Software". The "Orders" dropdown menu is open, showing a list of options: "Create New Order", "Enterprise SMA" (highlighted with a red box), "Enterprise List", "Sales Promotion", "Received Orders", and "Placed Orders". To the right of the navigation bar, the user's name "Plaskey, A" is displayed. Below the navigation bar is a search bar with a "Category..." dropdown and a "Search..." input field, followed by a "Search" button. Below the search bar is a breadcrumb trail: "Home > Tridium, Inc.". At the bottom left, a blue banner contains the text "Welcome to". On the right side of the interface, there are icons for a shopping cart (0), a document, a book, and a notification bell (0). The bottom right corner of the interface features a blue banner with various white icons representing different software products and services.

Create a new proposal



# Create a Proposal

CREATE PROPOSAL SUBMITTED PROPOSALS

Portfolio Name  Duration 1 year  Program Start Date 10/06/2022

COLUMNS FILTERS EXPORT REMOVE CLEAR TABLE VIEW SUMMARY

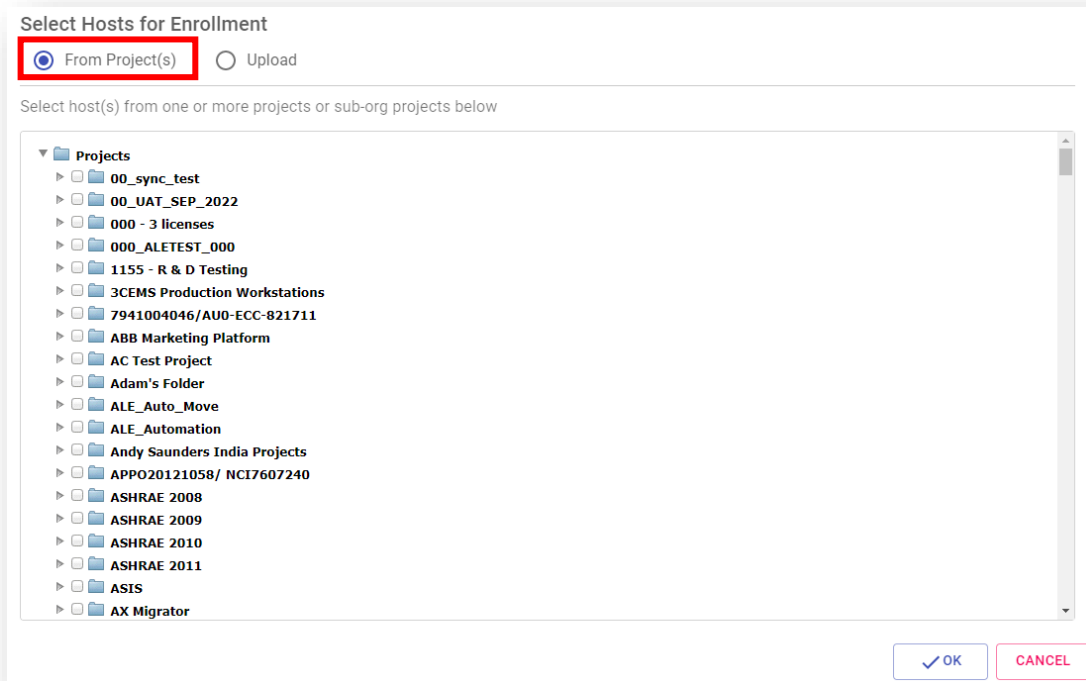
| <input type="checkbox"/> | Host ID | Part ↑ | Org | Capacity | Current Expiration | New Expiration | Grace Period (days) |
|--------------------------|---------|--------|-----|----------|--------------------|----------------|---------------------|
|--------------------------|---------|--------|-----|----------|--------------------|----------------|---------------------|

You will land on the Create Proposal page. To create an ESMA, you need the following:

1. List of Host IDs (minimum of 5 valid licenses)
2. End User Name/Project Name
3. Duration
4. SMA Start Date (within the next 60 days)

Start by clicking Select Hosts.

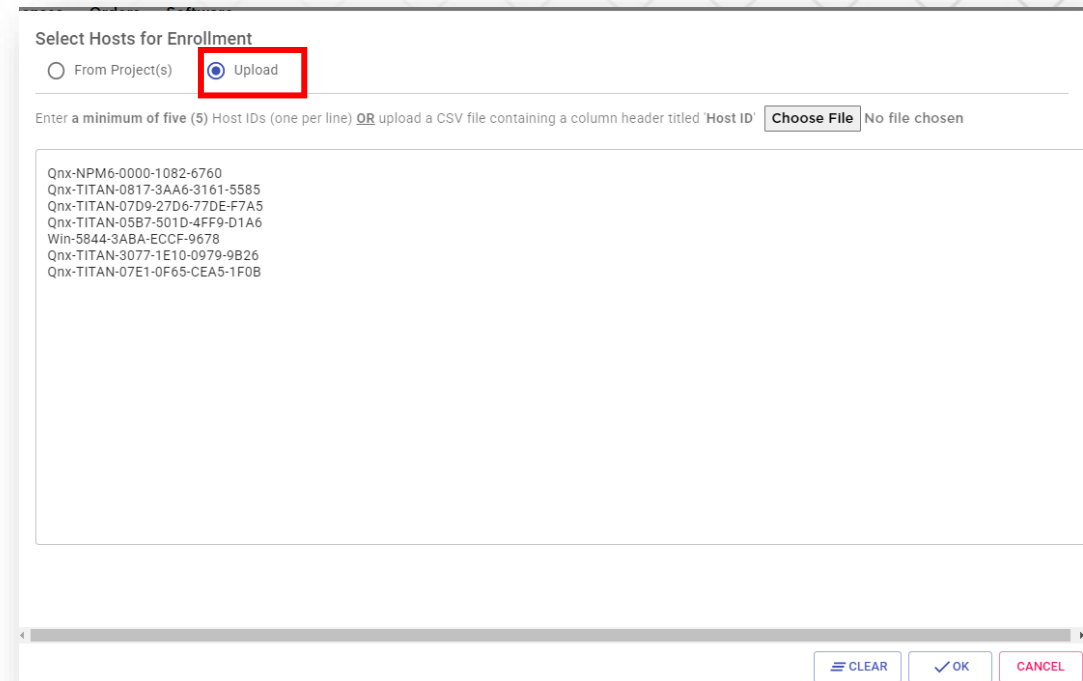
## There are 2 ways to add licenses to your proposal:



The screenshot shows the 'Select Hosts for Enrollment' dialog box. At the top, there are two radio buttons: 'From Project(s)' (which is selected and highlighted with a red box) and 'Upload'. Below the radio buttons, the text reads 'Select host(s) from one or more projects or sub-org projects below'. A tree view of project folders is displayed, including '00\_sync\_test', '00\_UAT\_SEP\_2022', '000 - 3 licenses', '000\_ALETTEST\_000', '1155 - R & D Testing', '3CEMS Production Workstations', '7941004046/AU0-ECC-821711', 'ABB Marketing Platform', 'AC Test Project', 'Adam's Folder', 'ALE\_Auto\_Move', 'ALE\_Automation', 'Andy Saunders India Projects', 'APPO20121058/ NCI7607240', 'ASHRAE 2008', 'ASHRAE 2009', 'ASHRAE 2010', 'ASHRAE 2011', 'ASIS', and 'AX Migrator'. At the bottom right, there are 'OK' and 'CANCEL' buttons.

From Projects allows you to go through your project folders and your customer's project folders to find the licenses you need.

Please note, you will only be able to find licenses under the account you are logged in under.



The screenshot shows the 'Select Hosts for Enrollment' dialog box. At the top, there are two radio buttons: 'From Project(s)' and 'Upload' (which is selected and highlighted with a red box). Below the radio buttons, the text reads 'Enter a minimum of five (5) Host IDs (one per line) OR upload a CSV file containing a column header titled 'Host ID''. There is a 'Choose File' button and the text 'No file chosen'. A text area contains the following Host IDs:  
Qnx-NPM6-0000-1082-6760  
Qnx-TITAN-0817-3AA6-3161-5585  
Qnx-TITAN-07D9-27D6-77DE-F7A5  
Qnx-TITAN-05B7-501D-4FF9-D1A6  
Win-5844-3ABA-ECCF-9678  
Qnx-TITAN-3077-1E10-0979-9B26  
Qnx-TITAN-07E1-0F65-CEA5-1F0B  
At the bottom right, there are 'CLEAR', 'OK', and 'CANCEL' buttons.

Upload allows you to copy and paste a list of Host IDs into the field and/or upload a CSV file with the required host ids.

This is the only way to add licenses that are listed under multiple distributors/OEMs.

Portfolio Name 
 Duration 
 Program Start Date

! Cannot Submit Proposal. The following eligibility requirements are not met:  
 1. Please select or specify a **Portfolio Name**  
 2. A minimum of **five (5)** hosts in the table must be eligible

| Host ID  | Part       | Org           | Capacity | Current Expiration | New Expiration | Grace Period (days) | Host Eligible | Suggested Parts                           |
|--|------------|---------------|----------|--------------------|----------------|---------------------|---------------|---|
| <input type="checkbox"/> Qnx-TITAN-0817-3AA6-3161-5585 | JACE-8000  | Tridium, Inc. | 11,250   | 27-Sep-2023        | 07-Oct-2023    | 9                   | ✓             | [ESMA_GRACE]                              |
| <input type="checkbox"/> Qnx-TITAN-07D9-27D6-77DE-F7A5 | JACE-8000  | Tridium, Inc. | 250      | 15-Mar-2023        | 07-Oct-2023    | 205                 | ✓             | [ESMA_GRACE]                              |
| <input type="checkbox"/> Qnx-TITAN-05B7-501D-4FF9-D1A6 | JACE-8000  | Tridium, Inc. | 10,000   | 10-Oct-2019        | 07-Oct-2023    | 363                 | ✓             | [SMA-8200-3YR]                            |
| <input type="checkbox"/> Win-5844-3ABA-ECCF-9678       | T-SEC-DEMO | Tridium, Inc. | 0        | -                  | -              | 0                   | ✗             | Not Eligible: License is a DEMO license   |
| <input type="checkbox"/> Qnx-TITAN-3077-1E10-0979-9B26 | JACE-8000  | Tridium, Inc. | 0        | 20-Jul-2024        | -              | 0                   | ✗             | Not Eligible: Maintenance already covered |
| <input type="checkbox"/> Qnx-TITAN-07E1-0F65-CEA5-1F0B | JACE-8000  | Tridium, Inc. | 0        | 13-Jul-2029        | -              | 0                   | ✗             | Not Eligible: Maintenance already covered |
| <input type="checkbox"/> Qnx-NPM6-0000-1082-6760       | SEC-J-601  | Tridium, Inc. | 0        | -                  | -              | 0                   | ✗             | Not Eligible: Platform type not eligible  |

After clicking OK, the licenses you have selected will populate in the table at the bottom of the page. Please note any errors in the red field.

On the license table, look at the Host Eligible column. There are several reasons why a license is not eligible for the proposal. The most common are:

1. It is an AX Jace license
2. It is a DEMO license
3. The current SMA's expiration date is further in the future than your proposed expiration date.
4. The license is already enrolled in a different ESMA.

**Edit Portfolio**

Enter portfolio details or select an existing portfolio

New Portfolio  Existing Portfolio

Portfolio Name \_\_\_\_\_

Address Line 1 \_\_\_\_\_

Address Line 2 (cont.) \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_

Zip \_\_\_\_\_ Country \_\_\_\_\_

Next, you want to click the pencil next to Portfolio Name, which will bring up this pop-up.

**Edit Portfolio**

Enter portfolio details or select an existing portfolio

New Portfolio  Existing Portfolio

Portfolio Name  
Tridium Campus

Address Line 1 \_\_\_\_\_

Address Line 2 (cont.) \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_

Zip \_\_\_\_\_ Country \_\_\_\_\_

You only need to fill out the Portfolio Name field, but you can fill out the full address if you would like.

SELECT HOSTS

Portfolio Name: **Tridium Campus** | Duration: **1 year** | Program Start Date: **10/07/2022** | SUBMIT PROPOSAL

**Cannot Submit Proposal. The following eligibility requirements are not met:**  
 1. A minimum of **five (5)** hosts in the table must be eligible

| Host ID  | Part       | Org           | Capacity | Current Expiration | New Expiration | Grace Period (days) | Host Eligible | Suggested Parts                           |
|--|------------|---------------|----------|--------------------|----------------|---------------------|---------------|---|
| <input type="checkbox"/> Qnx-TITAN-0817-3AA6-3161-5585 | JACE-8000  | Tridium, Inc. | 11,250   | 27-Sep-2023        | 07-Oct-2023    | 9                   | ✓             | [ESMA_GRACE]                              |
| <input type="checkbox"/> Qnx-TITAN-07D9-27D6-77DE-F7A5 | JACE-8000  | Tridium, Inc. | 250      | 15-Mar-2023        | 07-Oct-2023    | 205                 | ✓             | [ESMA_GRACE]                              |
| <input type="checkbox"/> Qnx-TITAN-05B7-501D-4FF9-D1A6 | JACE-8000  | Tridium, Inc. | 10,000   | 10-Oct-2019        | 07-Oct-2023    | 363                 | ✓             | [SMA-8200-3YR]                            |
| <input type="checkbox"/> Win-5844-3ABA-ECCF-9678       | T-SEC-DEMO | Tridium, Inc. | 0        | -                  | -              | 0                   | ✗             | Not Eligible: License is a DEMO license   |
| <input type="checkbox"/> Qnx-TITAN-3077-1E10-0979-9B26 | JACE-8000  | Tridium, Inc. | 0        | 20-Jul-2024        | -              | 0                   | ✗             | Not Eligible: Maintenance already covered |
| <input type="checkbox"/> Qnx-TITAN-07E1-0F65-CEA5-1F0B | JACE-8000  | Tridium, Inc. | 0        | 13-Jul-2029        | -              | 0                   | ✗             | Not Eligible: Maintenance already covered |
| <input type="checkbox"/> Qnx-NPM6-0000-1082-6760       | SEC-J-601  | Tridium, Inc. | 0        | -                  | -              | 0                   | ✗             | Not Eligible: Platform type not eligible  |

Now that we have entered a Portfolio Name, the only error we have is for the minimum of 5 eligible licenses.

Let's now adjust the Duration and Start Date of the proposal

SELECT HOSTS

Portfolio Name

Duration: 1 year, 3 years, 5 years

Program Start Date: 10/28/2022

SUBMIT PROPOSAL

CLEAR TABLE VIEW SUMMARY

Under Duration, you can select any of the options that are available. Please note that these options will change as we get closer to N4's EOL.

SELECT HOSTS

Portfolio Name: Tridium Campus

Duration: 3 years

Program Start Date: 10/07/2022

SUBMIT PROPOSAL

Cannot Submit Proposal. The following 1. A minimum of five (5) hosts in the...

| Part    | Org           | Capacity | Current Exp | Grace Period (days) |
|---------|---------------|----------|-------------|---------------------|
| CE-8000 | Tridium, Inc. | 250      | 20-Jul-2024 | 78                  |
| CE-8000 | Tridium, Inc. | 11,250   | 27-Sep-2023 | 10                  |
| CE-8000 | Tridium, Inc. | 250      | 15-Mar-2023 | 206                 |
| CE-8000 | Tridium, Inc. | 10,000   | 10-Oct-2019 | 364                 |

CLEAR TABLE VIEW SUMMARY

Then select a start date within the next 60 days. Dates will be grayed out if they are outside of this window.

SELECT HOSTS

Portfolio Name  
Tridium Campus

Duration  
3 years

Program Start Date  
12/01/2022

SUBMIT PROPOSAL

ⓘ Cannot Submit Proposal. The following eligibility requirements are not met:  
1. A minimum of **five (5)** hosts in the table must be eligible

Select Hosts for Enrollment

From Project(s)  Upload

Enter a minimum of five (5) Host IDs (one per line) **OR** upload a CSV file containing a column header titled 'Host ID'

Choose File No file chosen

Win-264B-6851-0015-E6B2

CLEAR OK CANCEL

Despite these changes, my proposal still isn't eligible.

If you have additional licenses to add to your proposal, you can click the Select Hosts button and add more.

SELECT HOSTS

Portfolio Name: Tridium Campus

Duration: 3 years

Program Start Date: 12/01/2022

SUBMIT PROPOSAL

COLUMNS FILTERS EXPORT REMOVE CLEAR TABLE VIEW SUMMARY

| Host ID                       | Part       | Org           | Capacity | Current Expiration | New Expiration | Grace Period (days) | Host Eligible | Suggested Parts                           |
|-------------------------------|------------|---------------|----------|--------------------|----------------|---------------------|---------------|---|
| Qnx-TITAN-3077-1E10-0979-9B26 | JACE-8000  | Tridium, Inc. | 250      | 20-Jul-2024        | 01-Dec-2025    | 133                 | ✓             | [SMA-8005-1YR]                            |
| Qnx-TITAN-0817-3AA6-3161-5585 | JACE-8000  | Tridium, Inc. | 11,250   | 27-Sep-2023        | 01-Dec-2025    | 65                  | ✓             | [SMA-8200-1YR] [SMA-8200-1YR]             |
| Qnx-TITAN-07D9-27D6-77DE-F7A5 | JACE-8000  | Tridium, Inc. | 250      | 15-Mar-2023        | 01-Dec-2025    | 261                 | ✓             | [SMA-8005-1YR] [SMA-8005-1YR]             |
| Qnx-TITAN-05B7-501D-4FF9-D1A6 | JACE-8000  | Tridium, Inc. | 10,000   | 10-Oct-2019        | 01-Dec-2025    | 54                  | ✓             | [SMA-8200-5YR] [SMA-8200-1YR]             |
| Win-264B-6851-0015-E6B2       | SUP-3      | Tridium, Inc. | 0        | 18-Sep-2023        | 01-Dec-2025    | 74                  | ✓             | [SUP-3-SMA-1YR] [SUP-3-SMA-1YR...]        |
| Win-5844-3ABA-ECCF-9678       | T-SEC-DEMO | Tridium, Inc. | 0        | -                  | -              | 0                   | ✗             | Not Eligible: License is a DEMO license   |
| Qnx-TITAN-07E1-0F65-CEA5-1F0B | JACE-8000  | Tridium, Inc. | 0        | 13-Jul-2029        | -              | 0                   | ✗             | Not Eligible: Maintenance already covered |
| Qnx-NPM6-0000-1082-6760       | SEC-J-601  | Tridium, Inc. | 0        | -                  | -              | 0                   | ✗             | Not Eligible: Platform type not eligible  |
| Win-264B-6851-0015-E6B2       | T-S-AX-3   | Tridium, Inc. | 0        | -                  | -              | 0                   | ✗             | Not Eligible: License status is 'Traded'  |

After setting my Duration and Start Date and adding an additional license to my proposal, now all errors have disappeared.

You will note that the New Expiration date is listed for each of the eligible licenses.

If your information is correct, you can now click Submit Proposal



Are you sure you want to submit this proposal?

After clicking Submit, you will be prompted to confirm your submission.

You can then email the proposal if you would like, or you can click Skip.

Then you will get a green checkmark showing that the submission was successful.

**Email Proposal**

Specify one or more recipients to whom this proposal should be emailed (optional)

To \_\_\_\_\_

CC \_\_\_\_\_

BCC \_\_\_\_\_

Current Expiration    New Expiration    Grace

✓ ESMA Proposal successfully submitted

Proposal details can be reviewed in the **Submitted Proposals** section

OK

View a submitted proposal

# View a submitted proposal

CREATE PROPOSAL **SUBMITTED PROPOSALS**

COLUMNS FILTERS EXPORT REFRESH

| ID  | Portfolio      | SI Account    | Partner Account | Generated   | Expires     | Status   | Action |
|-----|----------------|---------------|-----------------|-------------|-------------|----------|--------|
| 724 | Tridium Campus | Tridium, Inc. | Tridium, Inc.   | 06 Oct 2022 | 01 Dec 2022 | Proposed | RENEW  |
| 720 | Adams New Test | Tridium, Inc. | Tridium, Inc.   | 27 Sep 2022 | 07 Oct 2022 | Proposed | RENEW  |

To view your proposal, click on the Submitted Proposals tab and then click on the Proposal Number or name.

CREATE PROPOSAL **SUBMITTED PROPOSALS**

### ESMA Proposal #724 - Tridium Campus

← PROPOSALS EDIT DOWNLOAD EMAIL PLACE ORDER

|                                |                               |
|--------------------------------|-------------------------------|
| Portfolio                      | Tridium Campus <sup>1</sup>   |
| Address                        |                               |
| ESMA Provider                  | Tridium, Inc. (Tridium, Inc.) |
| Enrollment Status              | Proposed                      |
| Applied Grace Period (months)  | 19 <sup>2</sup>               |
| Total Quantity                 | 5 <sup>3</sup>                |
| Applicable Discount Code       | -                             |
| Applicable Discount Percentage | -                             |
| Proposal Generated             | Oct 6th, 2022 <sup>4</sup>    |
| Proposal Expiration Date       | Dec 1st, 2022                 |
| Enrollment Start Date          | Dec 1st, 2022 <sup>5</sup>    |
| Enrollment Duration (years)    | 3 <sup>6</sup>                |
| Enrollment Expiration Date     | Dec 1st, 2025 <sup>7</sup>    |

On this page, you will see the following info:

1. Proposal Name
2. Amount of Grace Period
3. Quantity of licenses on proposal
4. Proposal generated date
5. Proposal expiration date/Enrollment start date
6. Proposal Duration
7. Enrollment expiration date

## Purchasable Part List

| SMA Part Code | Quantity |
|---------------|----------|
| SMA-8200-5YR  | 1        |
| SUP-3-SMA-1YR | 2        |
| SMA-8005-1YR  | 3        |
| SMA-8200-1YR  | 3        |

The Purchasable Part List provides the part numbers and quantities that are needed to enroll this proposal.

## Enrolled Hosts (5)

| Host ID                       | Part      | License Capacity | Current Maintenance End Date | Grace Period (days) | Suggested SMA Parts                       |
|-------------------------------|-----------|------------------|------------------------------|---------------------|---|
| Qnx-TITAN-05B7-501D-4FF9-D1A6 | JACE-8000 | 10000            | 10-Oct-2019                  | 54                  | [ SMA-8200-5YR (1) ] [ SMA-8200-1YR (1) ] |
| Qnx-TITAN-07D9-27D6-77DE-F7A5 | JACE-8000 | 250              | 15-Mar-2023                  | 261                 | [ SMA-8005-1YR (2) ]                      |
| Qnx-TITAN-0817-3AA6-3161-5585 | JACE-8000 | 11250            | 27-Sep-2023                  | 65                  | [ SMA-8200-1YR (2) ]                      |
| Qnx-TITAN-3077-1E10-0979-9B26 | JACE-8000 | 250              | 20-Jul-2024                  | 133                 | [ SMA-8005-1YR (1) ]                      |
| Win-264B-6851-0015-E6B2       | SUP-3     | 0                | 18-Sep-2023                  | 74                  | [ SUP-3-SMA-1YR (2) ]                     |

The Enrolled Hosts table gives info for each individual license.

# Grace Period

Grace Period is SMA coverage that Tridium gives at no charge as part of an enrolled ESMA Proposal.

This is how it is calculated:

| Host Code                     | License Capacity | Current Maintenance End Date | Next Renewal Due On | Suggested SMA Parts              | Grace Period |
|-------------------------------|------------------|------------------------------|---------------------|----------------------------------|--------------|
| Qnx-TITAN-05B7-501D-4FF9-D1A6 | 10000            | 10-Oct-2019                  | 23-Nov-27           | [SMA-8200-5YR]<br>[SMA-8200-3YR] | 46           |

Licensing looks at the current SMA expiration date on each license

And it looks at the proposed ESMA expiration date

It then calculates the number of days between those 2 dates. In this example, the tool counted 8 years and 46 days. It recommended a 5YR and 3YR SMA, but anything that remains that is less than a year is covered by Grace.

This can add up very quickly and can be a great selling point for the end user.

# Introductory 20% Discount

Proposals with 25 or more licenses are eligible to receive a 20% discount off of their standard multiplier.

This discount is only valid for proposals enrolled (i.e. orders placed) up to December 31, 2022.

The promo code will be listed on the top table below the Total Quantity of licenses.

The customer doesn't have to do anything special to receive this discount, it will be automatically added to the order when the Order Entry team uploads their billing report.

|                                |        |
|--------------------------------|--------|
| Total Quantity                 | 72     |
| Applicable Discount Code       | ESMA20 |
| Applicable Discount Percentage | 20%    |

# Introductory 20% Discount

Proposals with 25 or more licenses are eligible to receive a 20% discount off of their standard multiplier.

This discount is only valid for proposals enrolled (i.e. orders placed) up to December 31, 2022.

The promo code will be listed on the top table below the Total Quantity of licenses.

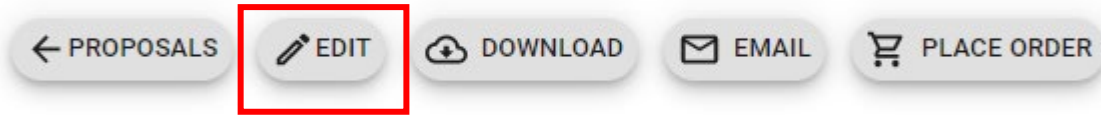
The customer doesn't have to do anything special to receive this discount, it will be automatically added to the order when the Order Entry team uploads their billing report.

|                                       |        |
|---------------------------------------|--------|
| <b>Total Quantity</b>                 | 72     |
| <b>Applicable Discount Code</b>       | ESMA20 |
| <b>Applicable Discount Percentage</b> | 20%    |

Edit an existing proposal



# Edit an Existing Proposal



You do have the ability to Edit existing proposals. After clicking the Edit button, you can change the Enrollment Start Date and Duration on the top table:

## ESMA Proposal #724 - Tridium Campus

|                                |                                     |
|--------------------------------|-------------------------------------|
| Portfolio                      | Tridium Campus                      |
| Address                        |                                     |
| ESMA Provider                  | Tridium, Inc. (Tridium, Inc.)       |
| Enrollment Status              | Proposed                            |
| Applied Grace Period (months)  | 19                                  |
| Total Quantity                 | 5                                   |
| Applicable Discount Code       | -                                   |
| Applicable Discount Percentage | -                                   |
| Proposal Generated             | Oct 6th, 2022                       |
| Proposal Expiration Date       | Dec 1st, 2022                       |
| Enrollment Start Date          | Enrollment Start Date<br>12/01/2022 |
| Enrollment Duration (years)    | 3 years ▾                           |
| Enrollment Expiration Date     | Dec 1st, 2025                       |

## ESMA Proposal #724 - Tridium Campus

|                                |                                     |
|--------------------------------|-------------------------------------|
| Portfolio                      | Tridium Campus                      |
| Address                        |                                     |
| ESMA Provider                  | Tridium, Inc. (Tridium, Inc.)       |
| Enrollment Status              | Proposed                            |
| Applied Grace Period (months)  | 19                                  |
| Total Quantity                 | 5                                   |
| Applicable Discount Code       | -                                   |
| Applicable Discount Percentage | -                                   |
| Proposal Generated             | Oct 6th, 2022                       |
| Proposal Expiration Date       | Nov 23rd, 2022                      |
| Enrollment Start Date          | Enrollment Start Date<br>11/23/2022 |
| Enrollment Duration (years)    | 5 years ▾                           |
| Enrollment Expiration Date     | Dec 1st, 2025                       |

Enrolled Hosts (5)

+ ADD -

| <input type="checkbox"/> | Host ID                       | Part      | License Capacity | Current Maintenance End Date | Grace Period (days) | Suggested SMA Parts                         |
|--------------------------|-------------------------------|-----------|------------------|------------------------------|---------------------|---|
| <input type="checkbox"/> | Qnx-TITAN-05B7-501D-4FF9-D1A6 | JACE-8000 | 10000            | 10-Oct-2019                  | 46                  | [ SMA-8200-5YR (1) ] [ SMA-8200-3YR (1) ]   |
| <input type="checkbox"/> | Qnx-TITAN-07D9-27D6-77DE-F7A5 | JACE-8000 | 250              | 15-Mar-2023                  | 253                 | [ SMA-8005-3YR (1) ] [ SMA-8005-1YR (1) ]   |
| <input type="checkbox"/> | Qnx-TITAN-0817-3AA6-3161-5585 | JACE-8000 | 11250            | 27-Sep-2023                  | 57                  | [ SMA-8200-3YR (1) ] [ SMA-8200-1YR (1) ]   |
| <input type="checkbox"/> | Qnx-TITAN-3077-1E10-0979-9B26 | JACE-8000 | 250              | 20-Jul-2024                  | 125                 | [ SMA-8005-3YR (1) ]                        |
| <input type="checkbox"/> | Win-264B-6851-0015-E6B2       | SUP-3     | 0                | 18-Sep-2023                  | 66                  | [ SUP-3-SMA-3YR (1) ] [ SUP-3-SMA-1YR (1) ] |

Select Hosts for Enrollment

From Project(s)  Upload

Enter a minimum of five (5) Host IDs (one per line) OR upload

Win-53E3-BB90-CC2D-3970

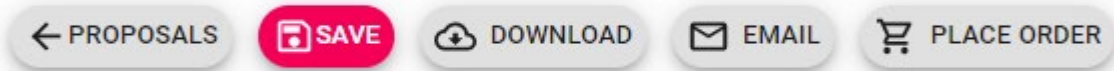
On the Enrolled Hosts table, you can add or remove licenses. If you click the Add button, you will get the same pop-up where you can add licenses from your Project Folders or by putting the Host IDs into the Upload field.

To remove licenses, just check the box on the left and click the “-” symbol.

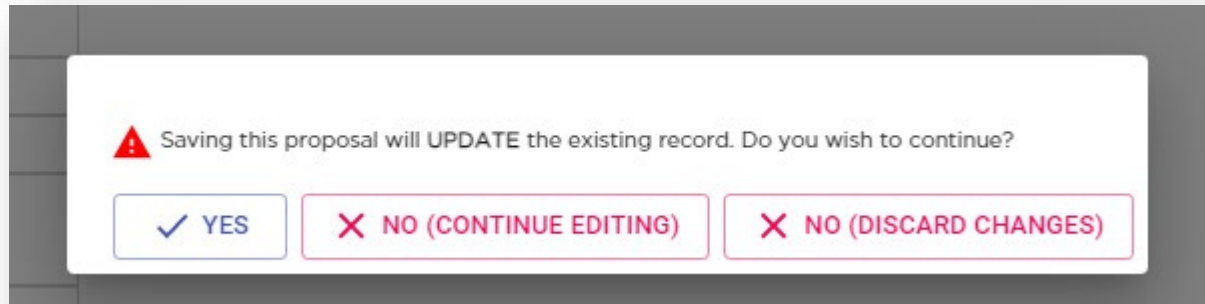
Enrolled Hosts (9)

+ ADD -

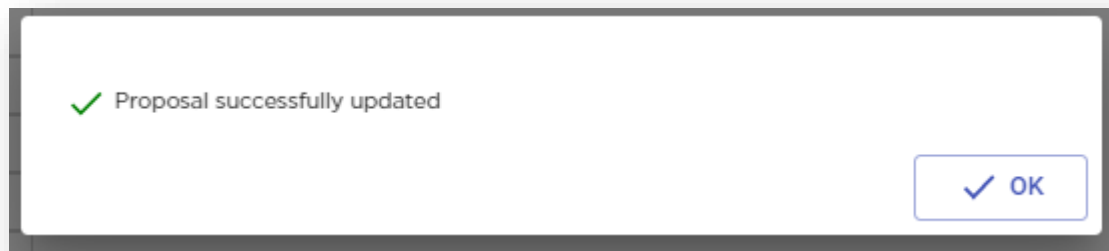
| <input type="checkbox"/>            | Host ID                       | Part      | License Capacity | Current Maintenance End Date | Grace Period (days) | Suggested SMA Parts                       |
|-------------------------------------|-------------------------------|-----------|------------------|------------------------------|---------------------|---|
| <input type="checkbox"/>            | Qnx-TITAN-05B7-501D-4FF9-D1A6 | JACE-8000 | 10000            | 10-Oct-2019                  | 46                  | [ SMA-8200-5YR (1) ] [ SMA-8200-3YR (1) ] |
| <input checked="" type="checkbox"/> | Qnx-TITAN-07D9-27D6-77DE-F7A5 | JACE-8000 | 250              | 15-Mar-2023                  | 253                 | [ SMA-8005-3YR (1) ] [ SMA-8005-1YR (1) ] |
| <input type="checkbox"/>            | Qnx-TITAN-0817-3AA6-3161-5585 | JACE-8000 | 11250            | 27-Sep-2023                  | 57                  | [ SMA-8200-3YR (1) ] [ SMA-8200-1YR (1) ] |



After completing your changes, click Save



Confirm that you want to continue



And click OK

## ESMA Proposal #724 - Tridium Campus

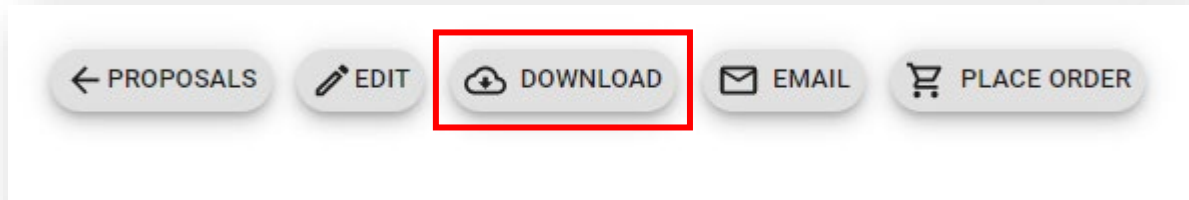
|                                |                               |
|--------------------------------|-------------------------------|
| Portfolio                      | Tridium Campus                |
| Address                        |                               |
| ESMA Provider                  | Tridium, Inc. (Tridium, Inc.) |
| Enrollment Status              | Proposed                      |
| Applied Grace Period (months)  | 18                            |
| Total Quantity                 | 5                             |
| Applicable Discount Code       | -                             |
| Applicable Discount Percentage | -                             |
| Proposal Generated             | Oct 6th, 2022                 |
| Proposal Expiration Date       | Nov 23rd, 2022                |
| Enrollment Start Date          | Nov 23rd, 2022                |
| Enrollment Duration (years)    | 5                             |
| Enrollment Expiration Date     | Nov 23rd, 2027                |

Your page will refresh and now the info you have changed will be updated.

The tool will recalculate the Grace period and Quantity of licenses on the top table as well.

## Enrolled Hosts (5)

| Host ID                       | Part      | License Capacity | Current Maintenance End Date | Grace Period (days) | Suggested SMA Parts                         |
|-------------------------------|-----------|------------------|------------------------------|---------------------|---|
| Qnx-TITAN-05B7-501D-4FF9-D1A6 | JACE-8000 | 10000            | 10-Oct-2019                  | 46                  | [ SMA-8200-5YR (1) ] [ SMA-8200-3YR (1) ]   |
| Qnx-TITAN-3077-1E10-0979-9B26 | JACE-8000 | 250              | 20-Jul-2024                  | 125                 | [ SMA-8005-3YR (1) ]                        |
| Qnx-TITAN-0817-3AA6-3161-5585 | JACE-8000 | 11250            | 27-Sep-2023                  | 57                  | [ SMA-8200-3YR (1) ] [ SMA-8200-1YR (1) ]   |
| Win-53E3-BB90-CC2D-3970       | SUP-UNL   | 9000             | 28-Feb-2025                  | 267                 | [ SUP-UNL-SMA-1YR (2) ]                     |
| Win-264B-6851-0015-E6B2       | SUP-3     | 0                | 18-Sep-2023                  | 66                  | [ SUP-3-SMA-3YR (1) ] [ SUP-3-SMA-1YR (1) ] |



**Download Proposal**

Select proposal file download format

PDF

Excel

The tool allows you to download an Excel file with all the proposal info.



Microsoft Excel  
97-2003 Worksheet

← PROPOSALS

✎ EDIT

☁ DOWNLOAD

✉ EMAIL

🛒 PLACE ORDER

### Email Proposal

To

Art.Vandelay@tridium.com

CC

BCC

✓ OK

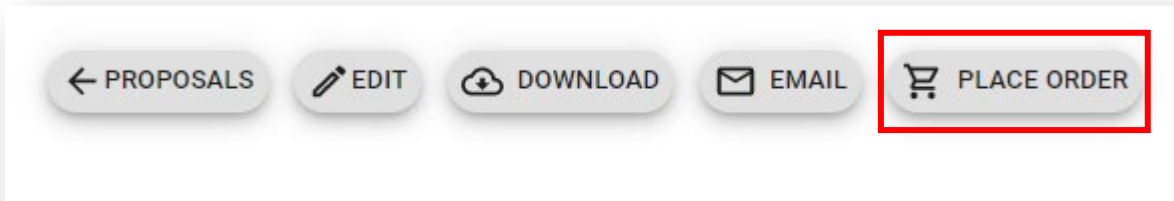
✗ CANCEL

You can also email the proposal.

# Converting a submitted proposal to order

# Converting an ESMA proposal to an order

To place the order, go to the proposal and click the “place order” button. Be sure to check the Email Licenses box and enter an email address. Enter the PO and click Process Cart



1. Check out

License file(s) is not automatically sent with the order confirmation. Please select the Email Licenses box below to receive a copy of the license file. .

Email Licenses (Optional):

WARNING: By opting to email the license, you will lose the ability to undo your order .

Email License Version: AX   
N4

If no version is selected, the default license version will be emailed.

Additional Emails:

Submitted To:


Submitted By:

PO Number :

Confirm PO Number :

Order Notes:

300 characters limit

 This is a Buy Cart

Item List

| Line Number | Quantity | Product         | Destination                   |
|-------------|----------|-----------------|-------------------------------|
| 10          | 1        | SMA-8200-5YR    | Qnx-TITAN-05B7-50ID-4FF9-DIA6 |
| 20          | 1        | SMA-8200-3YR    | Qnx-TITAN-05B7-50ID-4FF9-DIA6 |
| 30          | 1        | SMA-8005-3YR    | Qnx-TITAN-3077-1E10-0979-9B26 |
| 40          | 1        | SMA-8200-3YR    | Qnx-TITAN-0817-3AA6-3161-5585 |
| 50          | 1        | SMA-8200-1YR    | Qnx-TITAN-0817-3AA6-3161-5585 |
| 60          | 1        | SUP-UNL-SMA-1YR | Win-53E3-BB90-CC2D-3970       |
| 70          | 1        | SUP-UNL-SMA-1YR | Win-53E3-BB90-CC2D-3970       |
| 80          | 1        | SUP-3-SMA-3YR   | Win-264B-6851-0015-E6B2       |
| 90          | 1        | SUP-3-SMA-1YR   | Win-264B-6851-0015-E6B2       |

By clicking "Process Cart" you agree to the [Enterprise SMA Promotion Terms and Conditions](#)

Use of this site for ordering is subject to these [Ordering Terms of Use](#)



Qnx-TITAN-05B7-501D-4FF9-D1A6 [ Active ]

BUY OPTION   SELL OPTION   EMAIL   MORE ▾

Model : JACE-8000   Name : -   Maintenance End Date : Nov 23,2027  
 Brand : Niagara   Owner : Tridium, Inc.   Order : 17175232 / SPQ04092018  
 Serial No : 80056407   NiCS : OPEN *Inherited from Brand*   Version : 4.11 - N4  
 License Key : {DBC-3CE1-000C-OFF}   Expiration : never   **Enterprise : Tridium Campus**  
 Capacity : 10000

Options   Users   Notes   Audit

SW Options (2) >>

Maintenance (3) >>

Upgrades (0) >>

Prototypes (0) >>

Default Maints (0) >>

| Maintenance code  | Start Date  | Expires Date | Order(SO/PO)           | Actions |
|-------------------|-------------|--------------|------------------------|---------|
| SMA-8200-1YR-INIT | Apr 09,2018 | Oct 09,2019  | 17175232 / SPQ04092018 | ↶       |
| SMA-8200-5YR      | Nov 24,2022 | Nov 23,2027  | (Unbilled) / PO12345   | ↶       |
| SMA-8200-3YR      | Nov 25,2019 | Nov 24,2022  | (Unbilled) / PO12345   | ↶       |

After the purchase is complete, if you look at the License page, you will see a couple of things:

1. The Enterprise line that shows the name of the Proposal.
2. The SMAs that were added to the license. Note the grace period between the INIT expiry date and 3YR start date.

# \$0 Proposals

It is possible to create ESMA proposals that do not have any required SMAs to purchase.

However, you CANNOT complete this proposal, as the Place Order button will be greyed out. Your only option is to add an additional license to the proposal that requires an SMA or select a longer ESMA duration.

ESMA Proposal #723 - Adam New Test

← PROPOSALS EDIT DOWNLOAD EMAIL PLACE ORDER

|                                |                               |
|--------------------------------|-------------------------------|
| Portfolio                      | Adam New Test                 |
| Address                        |                               |
| ESMA Provider                  | Tridium, Inc. (Tridium, Inc.) |
| Enrollment Status              | Proposed                      |
| Applied Grace Period (months)  | 1                             |
| Total Quantity                 | 5                             |
| Applicable Discount Code       | -                             |
| Applicable Discount Percentage | -                             |
| Proposal Generated             | Sep 27th, 2022                |
| Proposal Expiration Date       | Oct 7th, 2022                 |
| Enrollment Start Date          | Oct 7th, 2022                 |
| Enrollment Duration (years)    | 3                             |
| Enrollment Expiration Date     | Oct 7th, 2025                 |

Purchasable Part List

| SMA Part Code | Quantity |
|---------------|----------|
| No rows       |          |


Enrolled Hosts (5)

| Host ID                       | Part      | License Capacity | Current Maintenance End Date | Grace Period (days) | Suggested SMA Parts  |
|-------------------------------|-----------|------------------|------------------------------|---------------------|----------------------|
| Qnx-TITAN-07DF-5781-51E0-F16C | JACE-8000 | 5000             | 25-Sep-2025                  | 11                  | No Purchase Required |
| Qnx-TITAN-07EC-EB3C-1DD7-6B97 | JACE-8000 | 5000             | 25-Sep-2025                  | 11                  | No Purchase Required |
| Qnx-TITAN-0816-4370-929A-8566 | JACE-8000 | 5000             | 25-Sep-2025                  | 11                  | No Purchase Required |
| Qnx-TITAN-08A2-02D3-A705-D0F3 | JACE-8000 | 5000             | 25-Sep-2025                  | 11                  | No Purchase Required |
| Qnx-TITAN-0978-21A2-257F-2F28 | JACE-8000 | 5000             | 25-Sep-2025                  | 11                  | No Purchase Required |

# Renewing an enrolled existing proposal

# Renewing an enrolled expired proposal


- Tridium has introduced a new feature to allow customers to renew existing proposal.
- The users will see on the Submitted proposal tab a new column with the word Renew . This is active for expired enrolled proposal and inactive for active proposals.

|   |   |               |               |             |             |          |       |
|---|---|---------------|---------------|-------------|-------------|----------|-------|
| 7 | Calhoun Control   | Tridium, Inc. | Tridium, Inc. | 01 Jul 2019 | 10 Jul 2024 | Enrolled | RENEW |
| 4 | Calhoun Control  | Tridium, Inc. | Tridium, Inc. | 01 Jul 2019 | 02 Jul 2022 | Enrolled | RENEW |

- If the Renew button is active the user can click on it and a new window will open and allow the user to edit the renewal proposal.
- The renewal proposal will retain the details of the original proposal but some details can be edited.
- The user can add or remove host ids
- The user can change the Enrollment duration

## ESMA Proposal #359 - Yale University

[← PROPOSALS](#)[✓ SUBMIT](#)[📄 DOWNLOAD](#)[✉ EMAIL](#)

|                                |  |
|--------------------------------|--|
| Portfolio                      | Yale University  |
| Address                        | 300 Ceder ST<br>New Haven, CT 06519<br>USA   |
| ESMA Provider                  | Environmental Systems Corp (Schneider Electric Building LLC)                               |
| Enrollment Status              | Enrolled  |
| Applied Grace Period (months)  | 536  |
| Total Quantity                 | 108  |
| Applicable Discount Code       | -  |
| Applicable Discount Percentage | -  |
| Proposal Generated             | Mar 18th, 2021   |
| Enrollment Start Date          | Mar 23rd, 2022   |
| Enrollment Duration (years)    | <u>1 year</u> ▼  |
| Enrollment Expiration Date     | Mar 23rd, 2023   |

- If any of the licenses were enrolled in a previous proposal the system will give below error message:

|                          |                               |             |   |   |  |
|--------------------------|-------------------------------|-------------|---|---|--|
| <input type="checkbox"/> | Qnx-TITAN-018F-AF6E-9F0D-4C39 | J-8100      | 0 | 0 | Not Eligible: License enrolled in prior proposal |
| <input type="checkbox"/> | Qnx-TITAN-05A3-876C-C063-CBB1 | JENE-PC8025 | 0 | 0 | Not Eligible: License enrolled in prior proposal |
| <input type="checkbox"/> | Qnx-TITAN-07B3-F782-8144-A464 | J-8005      | 0 | 0 | Not Eligible: License enrolled in prior proposal |
| <input type="checkbox"/> | Qnx-TITAN-0988-335F-4C98-83C1 | JENE-PC8100 | 0 | 0 | Not Eligible: License enrolled in prior proposal |
| <input type="checkbox"/> | Qnx-TITAN-0F5F-53B3-1114-33B8 | J-8025      | 0 | 0 | Not Eligible: License enrolled in prior proposal |
| <input type="checkbox"/> | Qnx-TITAN-1447-5398-78FD-A795 | JENE-PC8025 | 0 | 0 | Not Eligible: License enrolled in prior proposal |
| <input type="checkbox"/> | Qnx-TITAN-1B01-640F-303D-CEF4 | J-8025      | 0 | 0 | Not Eligible: License enrolled in prior proposal |

- Any renewal proposals will be visible in the Related Proposals tab from the original proposal

#### Related Proposals (1)

| ID  | Portfolio   | SI Account | Partner Account | Generated      | Expires        | Status   |
|-----|-------------|------------|-----------------|----------------|----------------|----------|
| 678 | GE Aviation | Lynxspring | Lynxspring      | Aug 12th, 2022 | Aug 12th, 2022 | Proposed |

- All new proposal have a tab called Parent Proposal where the user can see the original proposal that was renewed

#### Parent Proposal

| ID  | Portfolio   | SI Account | Partner Account | Generated      | Expires        | Status   |
|-----|-------------|------------|-----------------|----------------|----------------|----------|
| 367 | GE Aviation | Lynxspring | Lynxspring      | Apr 12th, 2021 | Apr 30th, 2022 | Enrolled |

# Extend ESMA Provider

# Extend ESMA Provider Service to Indirect Customers

Direct partners can extend the ESMA Provider service to their customers. The user extending the service to the partner needs to have below permissions Service read/readx

|         |                                     |                                     |
|---------|-------------------------------------|-------------------------------------|
| Service | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
|---------|-------------------------------------|-------------------------------------|

The customer will select the partner and go to their Entitlements page and click Add Entitlements

□ Cochrane Supply & Engineering  
■ Advanced Automation Solutions Helm Group

Org License Code : Not Available  
Customer Service Phone :  
Business Phone :  
Technical Support Phone :  
Order Management Phone :  
Business Email :  
Order Management Email :  
Customer Type : None

Entitlements Partners Brands Partners Expired Brands Notification Audit

Portability Access

No record available.

Brand Access ADD ENTITLEMENTS



- The next window will look like below

1. Select Brand | 2. Select Service | 3. Specify Order Details | 4. Confirmation

Below are the Brands available for IBA System ApS. Select the one you would like to purchase/process.

There are no Brands available for the selected Organization

CANCEL NEXT

- After clicking next you will see a pop-up message

**Confirm Entitlement** ✕

You have not selected any of the Brand. Do you really want to Skip Selection?

OK CANCEL

- Once the user clicks Ok a new window will open

1. Select Brand   2. Select Service   3. Specify Order Details   4. Confirmation

Below are the Service available for IBA System ApS. Select the one you would like to purchase/process.

|                                  | Service Name  | Expiration  | Description  |
|----------------------------------|---------------|---|--|
| <input checked="" type="radio"/> | ESMA Provider | 10-24-202: <input type="checkbox"/> Never Expires | Ability to generate Enterprise SMA Proposals with Licenses of any channel. |

Page 1 of 1   View 1 - 1 of 1

CANCEL   NEXT

- Select the ESMA provider and set an expiration date or tick the Never Expires box than click next. This will enable the service to the customer.

Thank you!