

Enterprise SMA Management Tool

WEBINAR: NOV 10, 11 AM ET



Enterprise SMA Management Tool

Tridium Talk

- Introduction
Jacqueline Walpole, Sr Product Manager
- Deep Dive Demo
Adam Plaskey, Sr Customer Experience Professional
- Q&A

Introduction – what is ESMT?

Introduction – what is SMA?

GLOSSARY

- SMA = Software Maintenance Agreement
 - Purchased on individual licenses
 - Ordered through Niagara Central Licensing
 - Mandatory with all N4 (non-Edge) license sales
 - Not allowed to be held in stock
 - Initial 18 months to allow for installation time
 - Renewals are available beyond initial 18 months
 - Must be active to version update Niagara

Introduction – why do you need SMA?



Introduction – what is ESMA?

GLOSSARY

- ESMA = Enterprise SMA
 - Allows alignment of the renewal dates of SMA for multiple licenses
 - Only available through Asset Manager
 - A tool for End Users – Owners & Operators
 - (or their nominated SI through an approval process)

Visit the
www.tridium.com
website



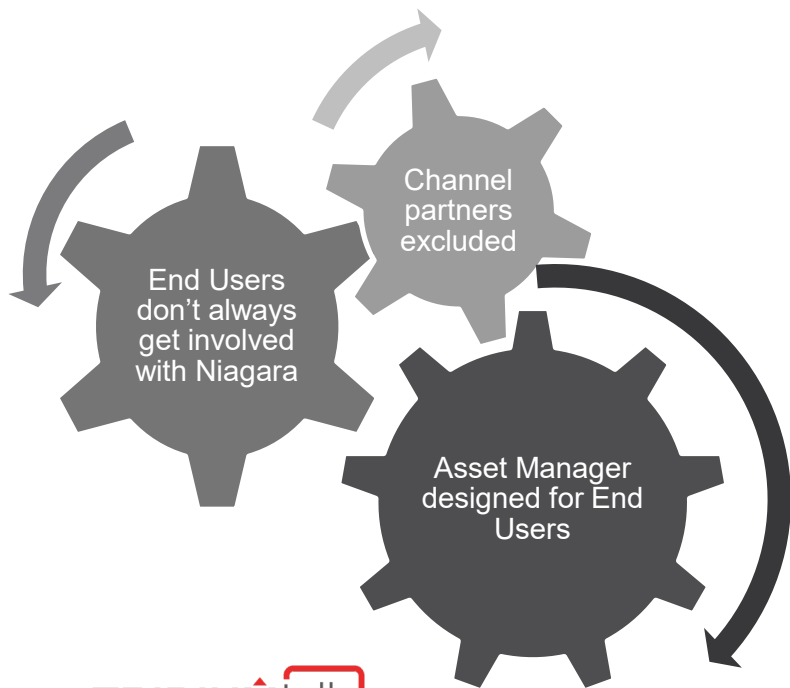
Introduction – what is ESMT?

GLOSSARY

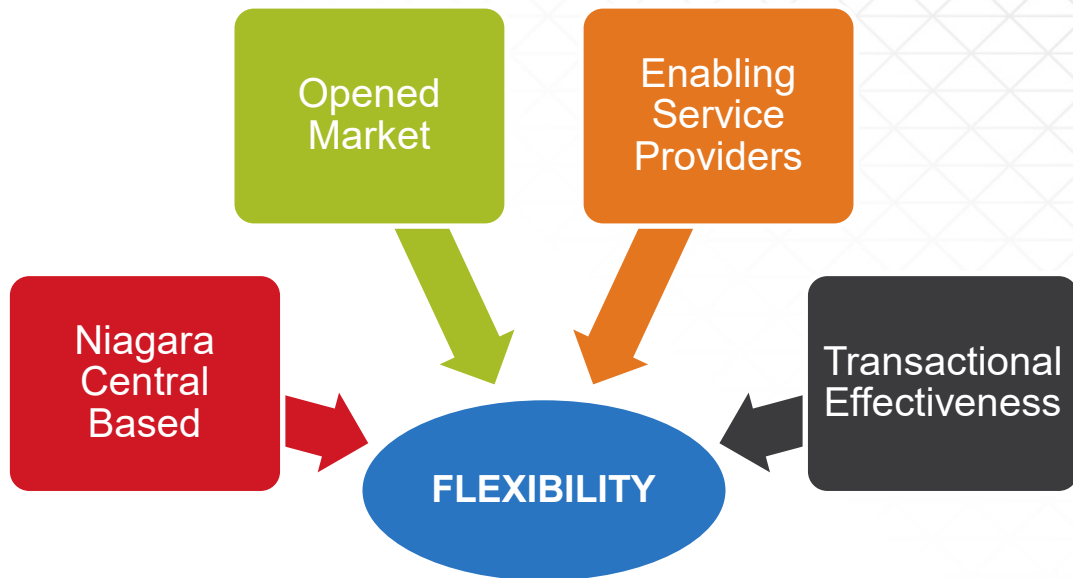
- ESMT = Enterprise SMA Management Tool
 - ESMA accessible through Niagara Central Licensing
 - All Tridium direct partners will have access and they can extend to their channels if they wish
 - ESMA will still be available through Asset Manager for End Users

Introduction – Why ESMT?

Existing ESMA options



New ESMA Management Tool



Value and Benefits

Enterprise SMA management and ordering directly from Niagara Central

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 spreadsheets
 - Enables authorized Niagara resellers to manage their portfolio of customers from a single account

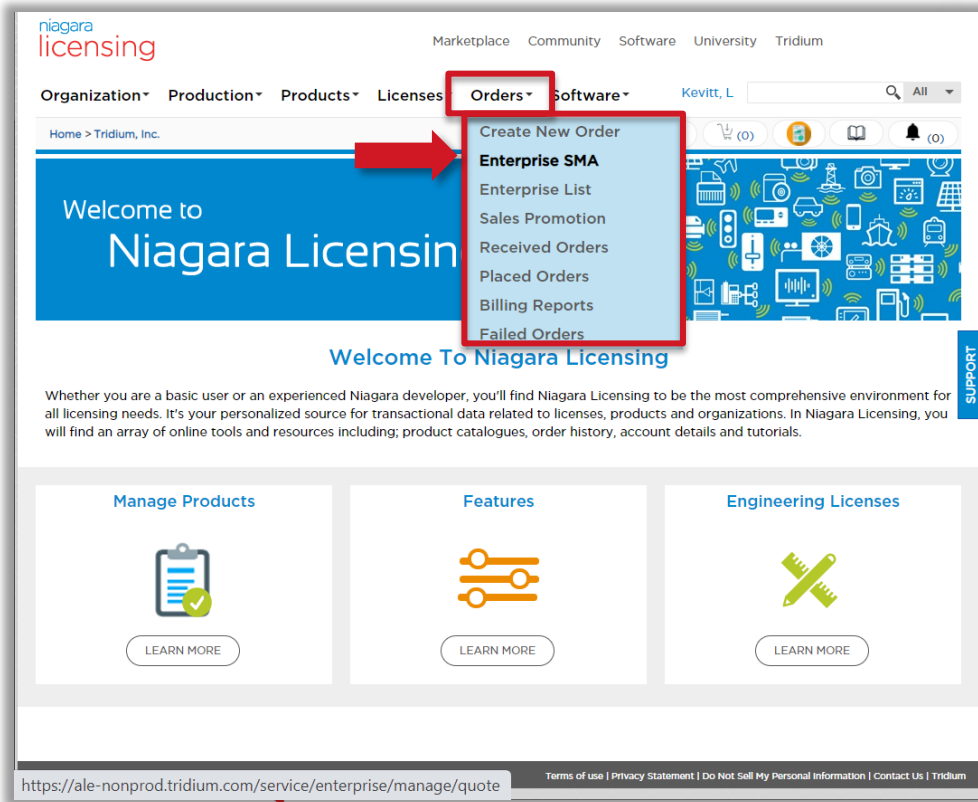
Benefits for system owners

- Sync-up maintenance expiration dates
- Generous “grace period” upon initial enrollment (up to 364 days/license)
- They don’t need to get involved (other than providing a PO)

Important points

- 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 partner's hierarchy
- Proposals are sent up through the channel and purchased by Tridium direct partners
- Applies up to 364 days grace period for each enrolled license to allow customers to sync-up maintenance expiration dates
- Introductory discount of 20% for more than 25 licenses enrolled up to December 31, 2022

How Does It Work...?



niagara
licensing

Marketplace Community Software University Tridium

Organization Production Products Licenses **Orders** Software Kevitt, L

Home > Tridium, Inc.

Welcome to
Niagara Licensing

Welcome To Niagara Licensing

Whether you are a basic user or an experienced Niagara developer, you'll find Niagara Licensing to be the most comprehensive environment for all licensing needs. It's your personalized source for transactional data related to licenses, products and organizations. In Niagara Licensing, you will find an array of online tools and resources including; product catalogues, order history, account details and tutorials.

Manage Products

Features

Engineering Licenses

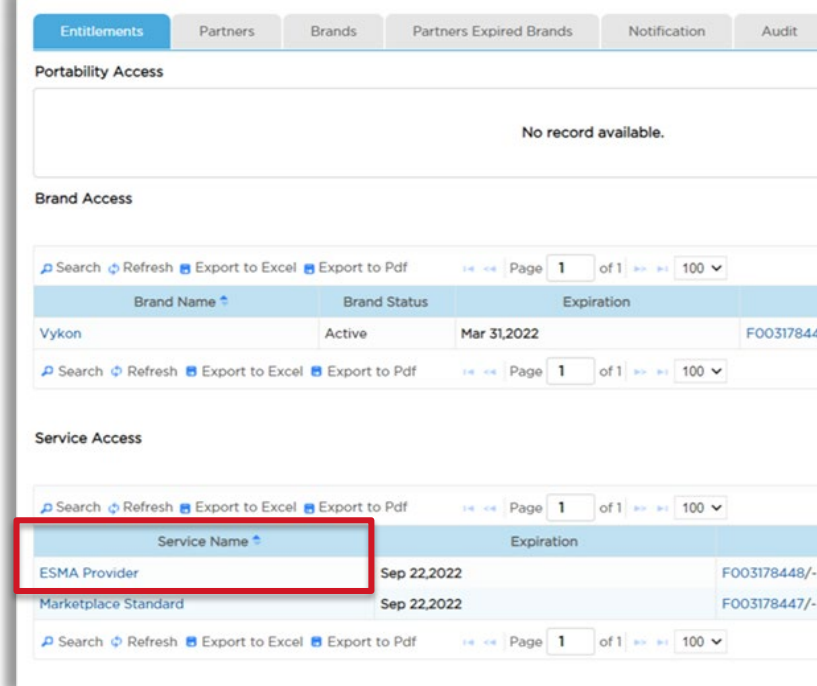
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<https://ale-nonprod.tridium.com/service/enterprise/manage/quote>

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Entitlements Partners Brands Partners Expired Brands Notification Audit

Portability Access

No record available.

Brand Access

Search Refresh Export to Excel Export to Pdf Page 1 of 1 100

Brand Name	Brand Status	Expiration	
Vykon	Active	Mar 31,2022	FO0317844

Search Refresh Export to Excel Export to Pdf Page 1 of 1 100

Service Access

Search Refresh Export to Excel Export to Pdf Page 1 of 1 100

Service Name	Expiration	
ESMA Provider	Sep 22,2022	FO03178448/-
Marketplace Standard	Sep 22,2022	FO03178447/-

Search Refresh Export to Excel Export to Pdf Page 1 of 1 100

How Does It Work...?

A list of hostids for
Niagara instances

PORTFOLIO


niagara
licensing

Organization▾ Production▾ Products▾ Licenses▾ Orders▾ Software▾

Home > Enterprise SMA

CREATE PROPOSAL SUBMITTED PROPOSALS

SELECT HOSTS

Portfolio Name  Duration 1 year ▾ Program Start Date 09/23/2021

Columns: COLUMNS FILTERS EXPORT X REMOVE CLEAR TABLE VIEW SUMMARY

<input type="checkbox"/>	Host ID	Part	Org	Capacity	Current Expiration	New Expiration	Grace Period (days)
No rows							

PROPOSAL

Bill of Materials for the purchase of SMAs
for a listed portfolio of hostids aligning
them to selected date for 1,3,or 5 years

How Does It Work...?

Select Hosts for Enrollment

☒ From Project(s) ☐ Upload

Select host(s) from one or more projects or sub-org projects below

- Projects
 - 00_sync_test
 - 000 - 3 licenses11
 - 000_ALETEST_000
 - 1155 - R & D Testing
 - 3CEMS Production Workstations
 - 7941004046/AU0-ECC-821711
 - ABB Marketing Platform
 - ALE_Auto_Move
 - ALE_Automation
 - Andy Saunders India Projects
 - Win-E927-3773-DCA4-8ACA [DEV-KIT-AX, SMA Exp: -]
 - Win-CB86-83FA-0005-43D2 [DEV-KIT-AX, SMA Exp: -]**
 - Win-FAE6-986A-7112-A9E2 [DEV-KIT-AX, SMA Exp: -]
 - APPO20121058/ NCI7607240
 - ASHRAE 2008
 - ASHRAE 2009
 - ASHRAE 2010
 - ASHRAE 2011
 - ASIS

Select Hosts for Enrollment

☐ From Project(s) ☒ Upload

Enter a minimum of five (5) Host IDs (one per line) OR upload a CSV file **Choose File** No file chosen ?

Qnx-TITAN-51FC-4D41-A921-BFDD

IMPORT.csv

	A	B	C
1	Host ID		
2	Qnx-TITAN-51FC-4D41-A921-BFDD		
3	Qnx-TITAN-5BD4-BC56-1974-3D13		
4	Qnx-TITAN-6436-389E-40C7-ECAD		
5	Qnx-TITAN-68B8-7833-A477-F971		
6	Qnx-TITAN-9F2B-03E6-6BDB-9CCA		
7	Qnx-TITAN-FOA1-2F5D-9371-A0B4		
8	Qnx-TITAN-FA03-1D9B-760B-9261		
9			
10			

IMPORT

Ready

OK CANCEL

TRIDIUM

How Does It Work...?

niagara
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Marketplace Community Software University Tridium

Organization Production Products Licenses Orders Software


Kevitt, L

Home > Enterprise SMA

Tridium, Inc.

CREATE PROPOSAL SUBMITTED PROPOSALS

COLUMNS FILTERS EXPORT REFRESH

ID	Portfolio	SI Account	Partner Account	Generated	Expires	Status
485	New Proposal	Tridium, Inc.	Tridium, Inc.	27 Sep 2021	20 Oct 2021	Proposed
484	Laura Kevitt	Tridium, Inc.	Tridium, Inc.	27 Sep 2021	02 Nov 2021	Proposed
483	Laura Kevitt	Tridium, Inc.	Tridium, Inc.	24 Sep 2021	01 Oct 2024	Enrolled
482	Sandra University			24 Sep 2021	24 Sep 2031	Enrolled
481	Sandra University			24 Sep 2021	24 Sep 2031	Enrolled
479	lketest123			24 Sep 2021	08 Nov 2031	Enrolled
478	Sandra University			24 Sep 2021	08 Nov 2021	Proposed
477	Sandra University			24 Sep 2021	08 Nov 2021	Proposed
476	Sandra University			23 Sep 2021	07 Nov 2021	Proposed
475	Natella Public Schools			24 Sep 2021	30 Sep 2021	Proposed
474	LEGACY TEST			23 Sep 2021	23 Sep 2026	Enrolled
473	AP Portfolio			24 Sep 2021	28 Sep 2021	Proposed
472	Plaskey Portfolio			23 Sep 2021	07 Nov 2021	Proposed
471	Adam's Portfolio			23 Sep 2021	03 Nov 2021	Proposed
470	Sandra University			23 Sep 2021	29 Sep 2022	Enrolled

How Does It Work...?

niagara
licensing

Marketplace Community Software University Tridium

Organization Production Products Licenses Orders Software

Home > Enterprise SMA

Tridium, Inc.

CREATE PROPOSAL SUBMITTED PROPOSALS

ESMA Proposal #485 - New Proposal

Portfolio	New Proposal
Address	3951 Westerre Parkway Richmond, VA 12345
ESMA Provider	Tridium, Inc. (Tridium, Inc.)
Enrollment Status	Proposed
Applied Grace Period (months)	66
Total Quantity	9
Applicable Discount Code	-
Applicable Discount Percentage	-
Proposal Generated	Sep 27th, 2021
Enrollment Start Date	Oct 20th, 2021
Enrollment Duration (years)	1
Enrollment Expiration Date	Oct 20th, 2022

← PROPOSALS EDIT DOWNLOAD EMAIL PLACE ORDER



← PROPOSALS

EDIT

DOWNLOAD

EMAIL

PLACE ORDER

Purchasable Part List

SMA Part Code	Quantity
SMA-8100-1YR	1
SMA-8010-1YR	2
SMA-8025-1YR	8

Enrolled Hosts (9)

Host ID	Part	License Capacity	Current Maintenance End Date	Grace Period (days)	
Win-CODF-AC6C-680C-B4E1	T-S-AX-100	0	18-Sep-2022	32	No F
Qnx-TITAN-9F2B-03E6-68DB-9CCA	BOSCH-8000	1750	23-Dec-2020	301	[SM
Qnx-TITAN-6436-389E-40C7-ECAD	BOSCH-8000	1250	05-Mar-2020	228	[SM

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Enrollment Start Date	Oct 20th, 2021
Enrollment Duration (years)	1
Enrollment Expiration Date	Oct 20th, 2022

DEEP DIVE DEMO

with Adam Plaskey

NIAGARA RESOURCES & MATERIALS

Where Can I Find More Information...?

The screenshot shows the Tridium website's navigation menu. The 'Services & Support' link is highlighted with a red box. Below it, the 'Software Maintenance Agreements' option is also highlighted with a red box. The website header includes the Tridium logo and the text 'OPEN AUTOMATION SOLUTIONS'. The main navigation bar lists 'Products', 'Learn', 'Where to Buy', and 'Services & Support'. The secondary navigation bar lists 'Niagara Community', 'Niagara Resource Center', and 'Tridium University'. The main content area features a grid of icons representing various services: Professional Services, Software Maintenance Agreements (highlighted), Niagara Asset Manager, Tridium University, Niagara Marketplace, Niagara Cloud Services, Library, About Tridium, and Events. A 'FIND OUT MORE' button is located below the grid.

TRIDIUM OPEN AUTOMATION SOLUTIONS

Products Learn Where to Buy **Services & Support**

Niagara Community | Niagara Resource Center | Tridium University

Professional Services **Software Maintenance Agreements** Niagara Asset Manager Tridium University Niagara Marketplace Niagara Cloud Services Library About Tridium Events

FIND OUT MORE

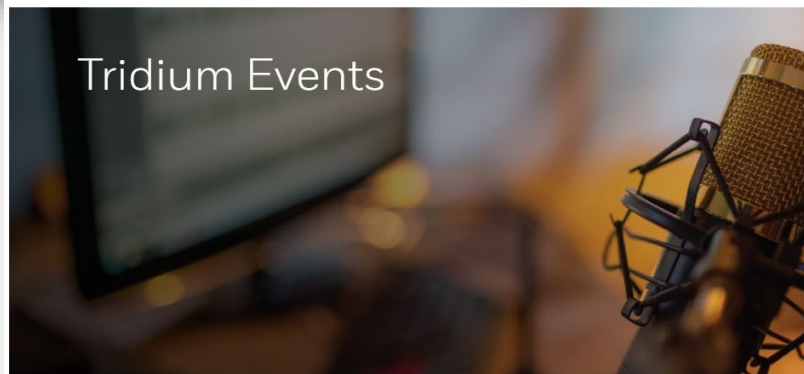
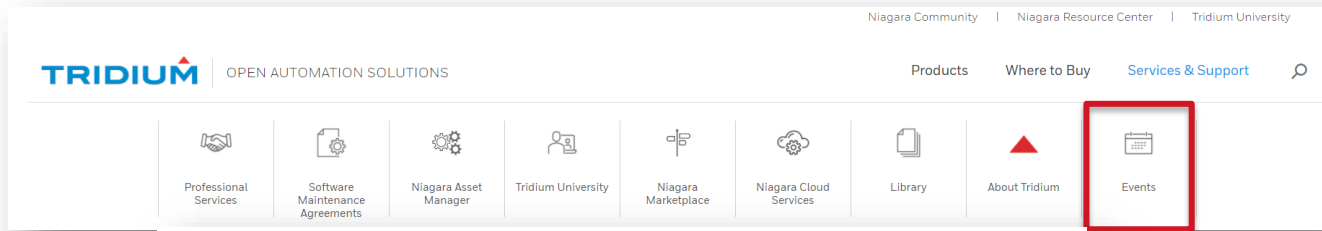
The Open Alternative

www.tridium.com

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TridiumTalk: Niagara 4 E-Signature Application (October 20, 2022)

The Niagara 4 E-Signature Application

October 20th 2022
Kyle Sardinia, Tridium

Watch on



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THANK YOU
Q&A

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