Syllabus
Software Asset Management Specialist
(SAM) Certification

Version 2.1

Table of contents

Contents

Introduction

The ITAMOrg Software Asset Management certification (SAM) syllabus and qualification scheme is designed to provide Software Asset Managers, who work in the typically multifaceted computing environment of small/medium to large companies, with the appropriate knowledge to implement and maintain an effective SAM program. The three-day SAM course is designed for IT professionals with little understanding of the IT Asset Management area.

Learning objectives

Attendees will, after the course, be able to demonstrate an overall understanding of the Software Asset Manager's role in relation to:

- Understanding the risks, costs, challenges and benefits associated with SAM in a dynamic IT environment
- Understanding the different types of licensing methods commonly used by software suppliers
- Recognizing the potential issues that arise when implementing a SAM program
- Gathering the required information about the organizational environment into which the SAM program is being implemented
- Developing a comprehensive business case for SAM to gain commitment to the SAM project
- Understanding the key SAM processes required to ensure the effective SAM program
- Specifying the requirements for evaluating and selecting the correct tools for SAM
- Developing and communicating the related software policy
- Understanding how SAM interfaces with IT Service Management including ITIL and other BPs
- Planning for the development and implementation of all SAM policies, procedures and tools
- Establishing and maintaining a database containing the data relevant to SAM
- Understanding how to control all activities associated with the software lifecycle
- Detecting, escalating and managing all exceptions with policies, processes, procedures and licenses in the correct way
- Managing all relationships within the business and with partners/suppliers to the agreed service levels
- Continually assessing the effectiveness of policies and procedures in relation to the different tiers

The SAM course is based on Software Asset Management best practices and standardization. It combines IT Service Management best practice with the Software Asset Management standard (ISO19770).

Scope certification

The ITAMOrg offers a career path for professionals working in the field of IT Asset Management.
This starts with the the Foundation certification: ITAMOrg IATM Foundation Certification.

There are also two specialist modules for practitioners:
- Software Asset Management Specialist Certification
- Hardware Asset Management Specialist Certification
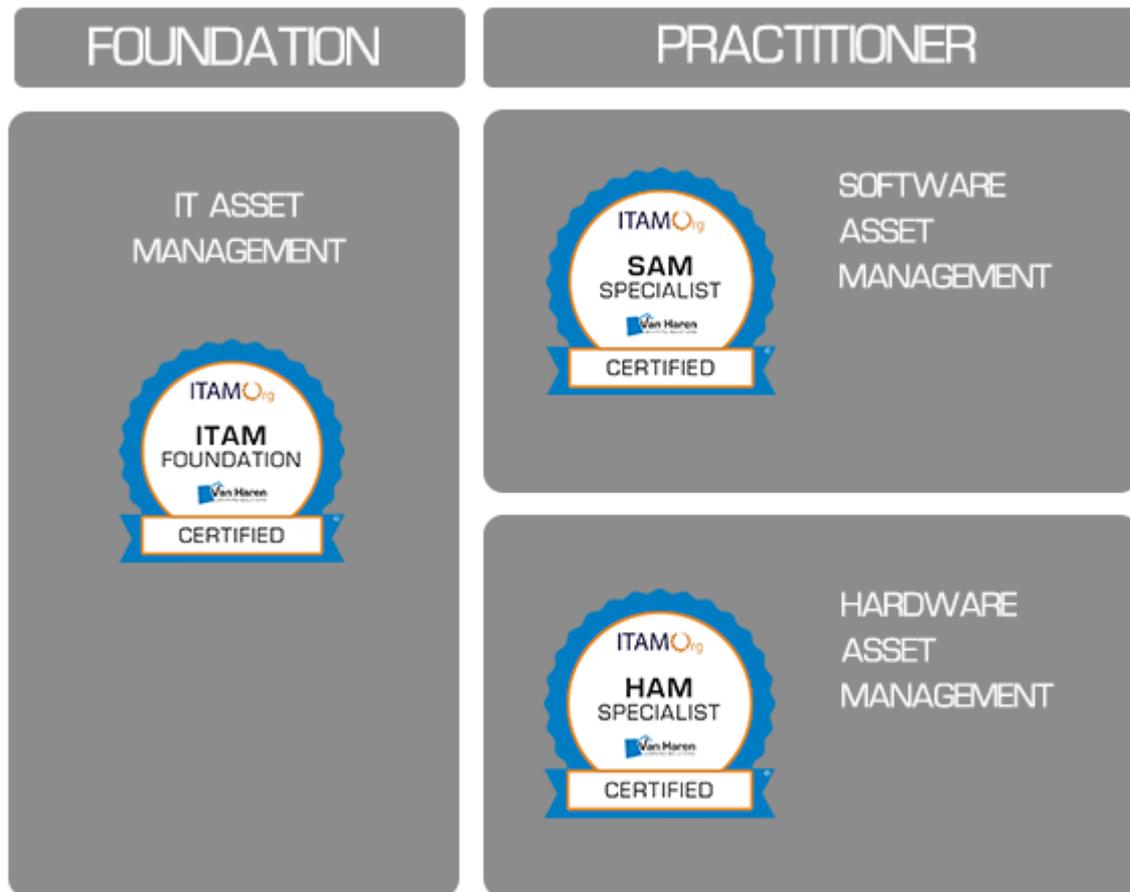
The Software Asset Management Specialist exam

In order to obtain the Software Asset Management Specialist Certificate you first need to have successfully completed the Software Asset Management Specialist exam. The exam procedure is explained in the following section.

The examination is a one-hour closed book multiple choice consisting of 40 questions.

The pass mark is 65%.

The examination will be founded on the syllabus as stated in this document. All examination questions will be drawn from any and all subjects in this syllabus, and the amount of weight allocated to any given topic has to be expected to be in proportion to the given topic's coverage in this syllabus.

Practical information

You must pass a multiple-choice exam in which your knowledge of Software Asset Management will be tested to obtain your Software Asset Management Specialist certificate.

All exam candidates will get access to the online exam environment and will need to answer 40 multiple-choice questions within 60 minutes.

You must answer 65% of the questions correctly (or at least 26 of the 40 questions) to pass. Each question includes four possible answers, of which only one is the correct answer.

You will receive the result immediately after the exam. (Digital) Access to your certificate will be given once you have passed.

Registration for the exam can be done by purchasing a participation certificate at www.vhls.global.

Time (minutes) for the exam:	60 minutes
% minimal passing grade	65%
Open/closed book:	Closed
Language:	English. See http://www.vhls.global for other available languages.
Exam format:	Online
Type of questions:	Multiple Choice
Special abilities and regulations for people with disabilities or non-native English.	Please see: https://www.vhls.global/van-haren/examination/exam-regulations/

Levels

The ITAMOrg Software Asset Management Certification tests candidates at levels 1, 2 and 3, according to the Bloom Revised Taxonomy.

Bloom Level 1: Recall & Retention

We test candidates on their ability to memorize factual information, to retain information by collecting, remembering, and recognizing specific knowledge. Knowledge includes facts, terms, answers, or terminology.

Bloom Level 2: Understanding

We test candidates on their ability to construct meaning from oral, written, or graphical pieces of information. This is done by interpreting, summarizing, distracting, comparing, classifying, predicting, or explaining the message.

Bloom Level 3: Apply

We examine candidates on their ability to resolve issues in new situations by applying acquired knowledge, facts, techniques and rules in a different, or new way.

Recommended essentials

The desired – but not required – criteria for participating in the SAM course are:

- ITAMOrg IT Asset Management Foundation course and certification
- At least three months of experience in all phases of Software Asset Management
- An understanding of IT Service Management best practice – have participated in ITIL Foundation v. 3 or later - and a general understanding of IT

Notification to training providers

Each major theme heading in this syllabus is assigned an allocated time. This has a two-fold purpose: firstly, to give both guidance on the proportion of time to be allocated, relative to each section of a certified training course and an approximate minimum time to be spent on teaching for each section.

Secondly, to guide how the section is weighted in relation to the number of questions in the exam.

The trainer may spend more time than is indicated, if deemed necessary and participants may need to spend more time again in reading and research.

The total time specified is 28 hours for both lectures and practical work such as assignments. The individual courses do not have to follow the same order as the syllabus. The individual courses may be run as a singular module or broken down into two or three smaller modules.

This syllabus is structured into sections relating to major theme headings and numbered with a single character number to define each section. Each section is allocated a minimum contact time for presentation.

Topics in the Software Asset Management Specialist exam

In this section, you can read about how the Software Asset Management exam is structured and which subjects you will be tested on as a candidate. It is also a tool that you can use to prepare yourself for the exam.

During the exam you will be tested on your general knowledge about:

- Introduction to Software Asset Management
- SAM principles
- SAM interfaces
- SAM activities
- SAM implementation
- SAM benefits, costs, problems and risks
- SAM compliance and audits
- Roles and organizational challenges
- SAM business case
- SAM processes and relation to other best practices

Exam structure

The exam specifications describe the topics covered in the subject matter of the Software Asset Management Specialist exam , and their relative importance. Questions can be asked during the exam about the following subjects.

Module	Subject	% questions in the exam
1.	Key concept of SAM	10%
2.	SAM principles	15%
3.	SAM practices	15%
4.	SAM implementation Tier 1	20%
5.	SAM implementation Tier 2	20%
6.	SAM implementation Tier 3	20%
		100%

In the following sections, you can find more details about what is expected regarding your knowledge of the various topics.

1. Introduction

Provides an introduction to the SAM structure and course structure.

2. Introduction to SAM

Introduces SAM, SAM principles and the impact of SAM on organizations using it. An appreciation and understanding of the interfaces and dependencies SAM has with other IT and Service Management processes.

On completion of the course, the candidate should be able to:
- Understand the activities involved in SAM
- Understand the development and evolution of SAM
- Describe the need for SAM and explain the principles involved
- Draw up a plan of approach to the implementation of SAM
- Understand the different terminologies and principles used in SAM
- Understand the potential benefits, costs and problems associated with software and its usage
- Describe the organizational risks associated with software and its usage
- Describe and explain the special characteristics of software assets and software licenses, including legal situations, counterfeit software, software supplier activities and software compliance
- Review SAM processes, identifying potential areas of weakness
- Describe and explain the software supply chain and the role of the organizations involved
- Understand other software industry players including standards (ISO/IEC 19770), antipiracy organizations and SAM partners
- Identify and understand the interfaces that SAM has with other IT and Service Management processes
- Understand how IT Service Management best practice will support SAM
- Describe and explain the roles, responsibilities and accountability of the SAM processes and information
- Explain the need for defining and agreeing roles and responsibilities
- Explain the organizational factors that need to be considered when defining roles and responsibilities
- Understand the responsibilities required to carry out specific roles, e.g. audit, reconciliation work and contract management

3. The business case for SAM

Describes the steps involved and the issues involved in preparing a business case for the introduction of SAM within an organization.
On completion of the course the candidate should be able to:
- Describe and explain the need for SAM, and the considerations and content of a SAM business case
- Obtain the appropriate information from the business and IT required to produce a SAM business case
- Assist with the production of a SAM business case

4. SAM as a practice

Explains the SAM tier-based implementation and process framework, and the scope and content of each tier and the processes and technologies involved within the framework. Introduces the case stories used though the SAM as a practice module.
On completion of the course the candidate should be able to:
- Describe and explain the overall SAM implementation framework

- Identify processes and technologies used in each tier of the implementation
- Describe and explain the stages in the lifecycle of software assets
- Describe and explain the SAM process groups and processes contained within the framework and their content
- Describe and explain the management controls, policies and procedures required, and their content
- Define and describe the dependencies of other IT and Service Management processes on SAM processes and information
- Define and document the dependencies of SAM on other Service Management processes and information

4.1 Implementation of SAM Tier one

Describes and explains the stages involved in the implementation of SAM within an organisation. Which covers the awareness, knowledge and use of SAM tools and techniques to support SAM processes. The identification and preparation of SAM reports for distribution throughout the organisation as appropriate and the instigation of process improvements.

On completion of the course the candidate should be able to:

- Identify and understand the Management controls, processes and technologies for a Tier one implementation
- Explain and justify the stages and activities involved in the implementation of SAM within an organisation at tier level 1
- Justify and initiate the implementation of SAM within an organisation
- Develop an outline plan for the implementation of SAM within an organisation
- Understand the different resource requirements between project and business as usual activities.
- Explain the types of SAM tools and their usage within the SAM processes at Tier 1
- Understand the evaluation criteria for choosing appropriate SAM tools at Tier 1.
- Justify, select, and procure the appropriate SAM support tools and techniques at Tier 1
- Justify and initiate the identification of SAM asset and get them under control
- Explain the Policies, Procedures & Processes for the SAM framework at Tier 1
- Explain the competences needed in SAM at Tier 1
- Understand and initiate the communication of the policies, procedures, and processes at Tier 1
- Explain and justify how SAM Assets are recorded and how it affects the accurately situation
- Explain and initiate how License Compliance is enabled
- Understand how to manage and maintain SAM information
- Identify the SAM related reports required throughout the organisation at Tier 1
- Define and report on the measurements, metrics and Key Performance Indicators (KPIs) of SAM at Tier 1

4.2 Implementation of SAM Tier two

Describes and explains the stages involved in the implementation of SAM within an organisation. Which covers the awareness, knowledge and use of SAM tools and techniques to support SAM processes. The identification and preparation of SAM reports for distribution throughout the organisation as appropriate and the instigation of process improvements.

On completion of the course the candidate should be able to:

- Identify and explain the objective at SAM Tier 2 level and how to establish practical management around SAM
- Identify and understand the Management controls, processes and technologies for a Tier 2 implementation
- Explain and justify the stages and activities involved in the implementation of SAM within an organisation at tier level 2
- Justify and initiate the implementation of SAM within an organisation
- Develop an outline plan for the implementation of SAM within an organisation
- Understand the different resource requirements between project and business as usual activities.
- Explain the types of SAM tools and their usage within the SAM processes at Tier 2.
- Understand the evaluation criteria for choosing appropriate SAM tools at Tier 2.
- Justify, select and procure the appropriate SAM support tools and techniques at Tier 2
- Explain the Policies, Procedures & Processes for the SAM framework at Tier 2
- Explain the competences needed in SAM at Tier 2
- Understand and initiate the communication of the policies, procedures, and processes at Tier 2
- Explain and initiate how optimization and integration to between SAM systems and related systems are enabled at Tier 2
- Explain and initiate how optimization and integration between SAM processes and related processes are enabled at Tier 2
- Understand how to manage and maintain SAM information at Tier 2
- Identify the SAM related reports required throughout the organisation at Tier 2
- Define and report on the measurements, metrics, and Key Performance Indicators (KPIs) of SAM at Tier 2

4.3 Implementation of SAM Tier three

Describes and explains the stages involved in the implementation of SAM within an organisation. Which covers the awareness, knowledge and use of SAM tools and techniques to support SAM processes. The identification and preparation of SAM reports for distribution throughout the organisation as appropriate and the instigation of process improvements.

On completion of the course the candidate should be able to:

- Identify and explain the Objective at the Tier 3 on how to create greater efficiency and effectiveness by optimizing cross-cutting contexts, with focus on cost
- Identify and understand the Management controls, processes and technologies for a Tier 3 implementation
- Explain and justify the stages and activities involved in the implementation of SAM within an organisation at tier level 3
- Justify and initiate the implementation of SAM within an organisation at Tier 3
- Develop an outline plan for the implementation of SAM at Tier 3 within an organisation
- Explain the types of SAM tools and their usage within the SAM processes at Tier 3
- Understand the evaluation criteria for choosing appropriate SAM tools at Tier 3.
- Justify, select and procure the appropriate SAM support tools and techniques at Tier 3
- Understand how to manage and maintain SAM information at tier 3
- Justify and initiate how SAM contracts and supplier information must be relevant, realistic, controlled and managed at Tier 3
- Justify and initiate how SAM financials must reflect the current and future situation and be controlled and managed at Tier 3
- Justify and initiate how SAM measure must be aligned with business and SAM operational needs, and must be managed and controlled at Tier 3
- Justify and initiate how SAM operational risks must be managed, controlled and communicated at Tier 3
- Identify the SAM related reports required throughout the organisation at Tier 3
- Define and report on the measurements, metrics and Key Performance Indicators (KPIs) of SAM at Tier 3

Exam regulations

General rules

Being ITAMOrg Asset Management certified is an honorary title, so fraud will not be tolerated. If there is any fraud detected in the exam execution the person taking the exam will directly fail the exam. Any payed fees involved will not be reimbursed.

Failing the exam by not having enough questions correct to achieve the minimum pass rate will result in a failure to achieve certification. A delegate is only entitled to take one single exam for each exam order; meaning you get one chance per exam to pass. If an exam is not passed, then a new exam needs to be taken.

© Van Haren Learning Solutions

Key terms and concepts

ITAMOrg has established an extensive glossary for the ITAM, SAM and HAM certifications. It's strongly advised to download the glossary via www.vhls.global and study these terms.

However, please note that if you only learn these terms, then you are often not sufficiently prepared to pass the exam.