

Create a software license contract

Lab 4.1

10-15 minute

Lab objectives

You will achieve the following objectives:

- Software license contract created
- Software license contract related to software entitlements

Lab Dependency: *Requires the completion of Labs 1.1 and 2.1*

Required Resources: *None*

Scenario

Rick Lemm, Software Asset Manager at Cloud Dimensions, Ltd. (CloudD), wants to create a software license contract in ServiceNow for Adobe Systems Creative Cloud subscriptions. To better manage visibility to contract terms and conditions and contract expiration, Rick wants to relate the appropriate software entitlements to the contract he creates.

Requirements Summary

User Stories

- STRY040101 – Create a software license contract

As a software asset manager, I need to create a new software license contract in ServiceNow for Adobe Systems Creative Cloud subscriptions, so that I can track and manage contractual obligations as it relates to software asset management.

- STRY040102 – Relate a contract to software entitlements

As a software asset manager, I need to relate Adobe Systems Creative Cloud software entitlements to the Adobe Systems Creative Cloud software license contract, so that I can have visibility to software entitlement related contractual information.

STRY040101 – Create a software license contract

Section 1 Create a contract record

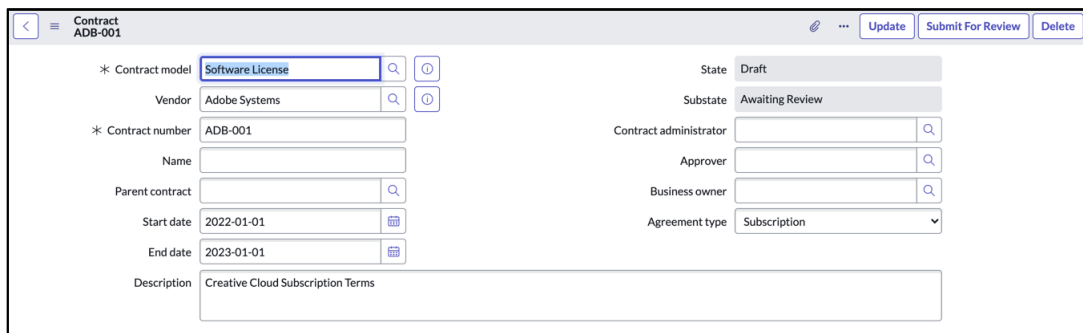
Rick Lemm, Software Asset Manager at CloudD, needs to create a new contract record in ServiceNow. The contract being entered into ServiceNow contains details related to CloudD's software license agreement with Adobe Systems for Creative Cloud usage rights.

1. If not already, impersonate **Rick Lemm**.
2. Navigate to **Contract > Contracts > Software Licenses**.
3. Click **New**.
4. Complete the form as follows:
 - Vendor: **Adobe Systems**
 - Contract number: **ADB-001**
 - Start date: **<first day of this month>**
 - End date: **<first day of this month next year>**
 - Agreement type: **Subscription**
 - Description: **Creative Cloud Subscription Terms**



Note: This is the minimum information needed to create a contract. In a real-world situation, you would want to provide the complete information required for your company business processes and potentially update the form to contain additional required fields needed for your specific business operations.

5. Click the Additional actions menu in the form header and select **Save**.



The screenshot shows the ServiceNow 'Contract' form for record ADB-001. The form header includes a back button, a menu icon, the title 'Contract ADB-001', and action buttons for 'Update', 'Submit For Review', and 'Delete'. The form is divided into two main sections. The left section contains fields for 'Contract model' (Software License), 'Vendor' (Adobe Systems), 'Contract number' (ADB-001), 'Name', 'Parent contract', 'Start date' (2022-01-01), 'End date' (2023-01-01), and 'Description' (Creative Cloud Subscription Terms). The right section contains fields for 'State' (Draft), 'Substate' (Awaiting Review), 'Contract administrator', 'Approver', 'Business owner', and 'Agreement type' (Subscription). Each field has a search icon or a dropdown arrow.

Section 2 Add contract terms and conditions (optional)

Contract terms can be stored with the contract in different ways. For example, attach a PDF of the contract to the contract record, add a link to the contract details stored in another location, or put the details into the Terms and Conditions section of the contract record. Rick wants to keep the terms and conditions in the contract record, as this is the easiest way to quickly view contract details when needed.

1. In a new browser window, navigate to: <https://www.adobe.com/legal/subsription-terms.html>.
2. Scroll down to the **Annual contract, paid monthly** section (under the header Creative Cloud, Document Cloud and Acrobat).
3. Start at the **Annual contract, paid monthly** line; highlight and copy all the text for annual subscriptions (i.e., through the end of the section entitled, **Annual contract, direct debit and bank transfer**).

Adobe Subscription and Cancellation Terms Trade Compliance Copyright, Trademark and DMCA Law Enforcement Requests Privacy

Annual contract, paid monthly

Subscription Terms

Your subscription begins as soon as your initial payment is processed. Your subscription will automatically renew annually without notice until you cancel. You authorize us to store your payment method(s) and to automatically charge your payment method(s) every month until you cancel. We will automatically charge you the then-current rate for your plan, plus applicable taxes (such as VAT or GST if the rate does not include it), every month of your annual contract until you cancel.

We may change your plan's rate each annual renewal term, and we will notify you of any rate change with the option to cancel. If the applicable VAT or GST rate (or other included tax or duty) changes during your one-year term, we will accordingly adjust the tax-inclusive price for your plan mid-term on your next billing date. If your primary payment method fails, you authorize us to charge any other payment method in your account. If you have not provided us a backup payment method(s) and you fail to provide payment, or if all payment methods in your account fail, we may suspend your subscription. You can edit your payment information anytime in your Adobe Account page.

For European Economic Area customers, your bank may require you to authenticate your initial purchase using a password, a one-time code sent to your mobile number, or biometric recognition. When you authenticate, you also authorize us to charge your payment method for your additional purchases without providing us further payment information or other instructions (i.e., we will initiate future payments independently). Such additional purchases may occur when we automatically charge your payment method in connection with a recurring subscription or when you add or change licenses or products.

Cancellation Terms

You can cancel your subscription anytime via your Adobe Account page or by contacting Customer Support*. If you cancel within 14 days of your initial order, you'll be fully refunded. Should you cancel after 14 days, you'll be charged a lump sum amount of 50% of your remaining contract obligation and your service will continue until the end of that month's billing period.

* Specific countries require cancellations to be made only by contacting Customer Support. See the list of countries here.

4. In the contract record that was just created, under the **Terms and Conditions** form section, double-click **Insert a new row....**
5. Click the **magnifying glass** to the right of the Terms and Conditions field.
6. When the Terms and Conditions window is displayed, click **New**.
7. Set the Name to **Creative Cloud Annual Subscriptions**.



9. Paste the copied text from step 3 above into the **Description** field.

Note: *If prompted, select **Keep Formatting**.*

10. Click **Submit**.
11. Click the **green check mark** to save the terms and conditions you just added.
12. Under Related Links, click **Build Terms and Conditions**.
13. Click the Additional actions menu in the form header and select **Save**.
14. In the **Terms and Conditions** form section scroll through the terms and conditions you just entered to validate that they display in an easy-to-read format.

STRY040102 – Relate a contract to software entitlements

Section 3 Add covered assets

Covered assets for software licenses in ServiceNow are tracked in software entitlements. Now that the software license contract has been created, Rick wants to associate Adobe Systems Creative Cloud covered software entitlements to the contract.

1. As **Rick Lemm**, on the contract record created above, scroll down to the related lists.
2. On the **Assets Covered** related list, click **Edit....**
3. In the Collection filter, type ***creative cloud**.
4. Select all the **Adobe Systems Creative Cloud** records (these are all the associated entitlements) and click **>** to move them to the **Assets Covered List**.



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-- choose field -- -- oper -- -- value --

Collection

--None--

Assets Covered List

ADB-001

Adobe Systems Creative Cloud
 Adobe Systems Creative Cloud Single App
 Adobe-1835 - Adobe Systems Creative Cloud
 Adobe-1836 - Adobe Systems Creative Cloud
 Adobe-1837 - Adobe Systems Creative Cloud
 Adobe-1838 - Adobe Systems Creative Cloud 10
 Adobe-1839 - Adobe Systems Creative Cloud 10
 SAM90002 - Adobe Systems Creative Cloud

Asset tag
 Model category Software License
 Software model Adobe Systems Creative Cloud
 Active rights 400
 Purchased rights 400

- Click **Save**.
- Validate that the software entitlements you selected appear on the **Assets Covered** related list.

Child Contracts	Expense Lines	Users Covered	Assets Covered (8)	Clis Covered	Offerings	Service Commitment for Contract	Approval History	Contract History	Contract Rate Cards
<div> <input type="button" value="≡"/> <input type="button" value="▽"/> <input type="text" value="Asset"/> <input type="text" value="Search"/> <input type="button" value="⊗"/> <input type="button" value="—"/> <input type="text" value="Actions on selected rows..."/> <input type="button" value="New"/> <input type="button" value="Edit..."/> </div>									
Contract = ADB-001									
<input type="checkbox"/>	Asset	State	Substate	Location	Date added	Date removed			
<input type="checkbox"/>	Adobe Systems Creative Cloud Single App	In use		(empty)	2022-03-28				
<input type="checkbox"/>	Adobe-1838 - Adobe Systems Creative Clou...	Retired		(empty)	2022-03-28				
<input type="checkbox"/>	Adobe-1837 - Adobe Systems Creative Cloud	Retired		(empty)	2022-03-28				
<input type="checkbox"/>	Adobe Systems Creative Cloud	In use		(empty)	2022-03-28				
<input type="checkbox"/>	SAM90002 - Adobe Systems Creative Cloud	In use		(empty)	2022-03-28				
<input type="checkbox"/>	Adobe-1836 - Adobe Systems Creative Cloud	Retired		(empty)	2022-03-28				
<input type="checkbox"/>	Adobe-1839 - Adobe Systems Creative Clou...	Retired		(empty)	2022-03-28				
<input type="checkbox"/>	Adobe-1835 - Adobe Systems Creative Cloud	Retired		(empty)	2022-03-28				

- In the Approver field, enter **Asset Manager**.
- Click **Submit for Review**.



Congratulations! You have completed this lab!

You are now ready to begin learning about Software Spend Detection.

Lab takeaways



- What value does tracking software license contracts deliver?
- Why is it important to have easy access to contract terms & conditions?
- How are software license contracts associated to software license details?