

BEST PRACTICES FOR TRACKING SOFTWARE

Clients are responsible for ensuring that they have purchased a proper license for each piece of non-site licensed software installed on their computers. (Site-licensed software would be software that is distributed free to campus and can often be found at <http://software-central.berkeley.edu/>). Each software package has its own licensing agreement (End-User Licensing Agreement, aka EULA).

Below is a list of best practices to help guide you in creating a system for keeping proper track of your software and licenses. Proper tracking of software and licenses helps departments save money by planning for upgrades, and allows them to take advantage of bulk software sales rather than buying licenses one at a time. The university has numerous contracts with software vendors to provide extensive discounts over the retail box price.

WHAT TO KEEP:

- Hard copy of licenses, serial numbers, and activation keys
- Hard copy of invoices
- Hard copy of receipts
- Software media (CDs, disks)

WHERE TO KEEP IT:

- Licenses, serial numbers, and activation keys received by e-mail should be printed and filed in a binder or file folder which can be easily retrieved and which is designated for software licenses.
- Non-electronic licenses, serial numbers, and activation keys should be filed in the above-named binder or folder.
- Licenses, serial numbers, and activation keys received via e-mail should be saved in an appropriately named folder within saved mail (e.g., “Software Licenses”).
- Software media (e.g., disks, CDs) should be filed and kept in one location. There are many filing solutions, including diskette/CD file boxes, and binders with CD/DVD sleeves. If at all possible, organizing software alphabetically by software name makes for easy retrieval when necessary.

- All software media and hard copies of licenses, serial numbers and activation keys should be kept in a locked location (filing cabinet, closet, etc.).
- Optional electronic spreadsheet: if you have a server, that is the best place to keep it. If not, designate someone to be in charge of the spreadsheet and for that person to keep it on his or her local hard drive.

HOW LONG TO KEEP IT:

- Copies of invoices and/or receipts for all software purchases should be kept for the life of the software and should be filed with the licenses.
- As long as the software is still in use, you need to keep all records pertaining to it (CDs/disks, invoice, receipt, license, serial number, activation key).