NEW!

Enterprise Software Maintenance Management Tool

VYKON by TRIDIUM

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.

Does not apply to subscription-based licenses

Setting up Entitlements for ESMT

Organization Entitlement

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

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:

Access to the Enterprise SMA Tool

To access the ESMA Tool, log into Niagara Licensing.

Then go to Orders➜Enterprise SMA

Create a new proposal

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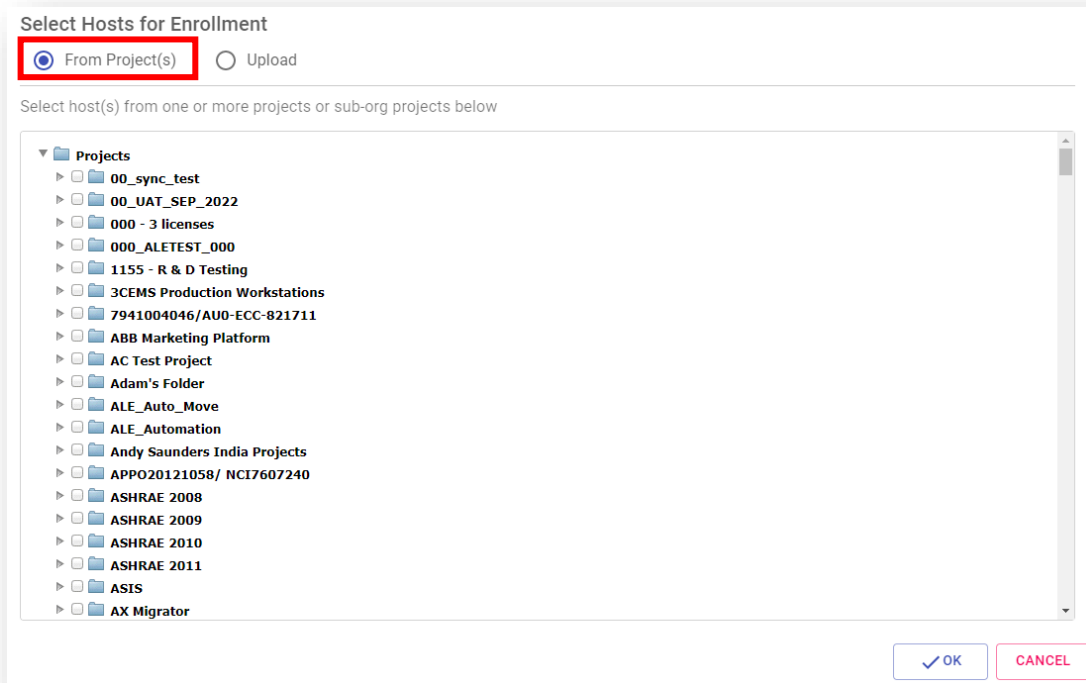
You will land on the Create Proposal page. To create an ESMA, you need the following:

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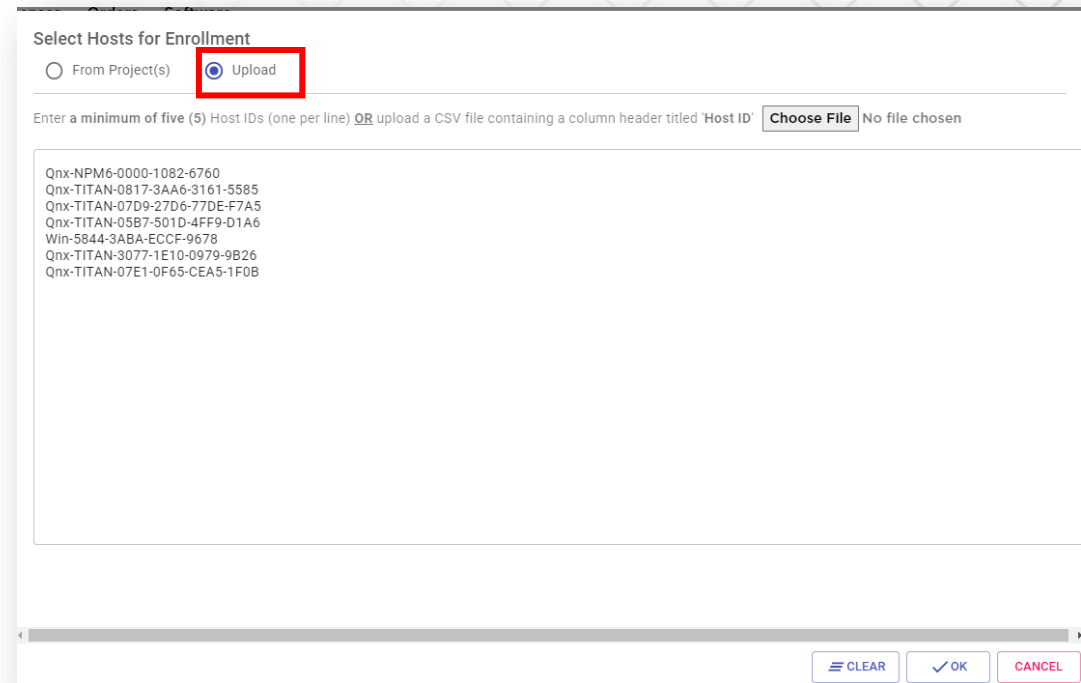
There are 2 ways to add licenses to your proposal:

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.

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.

	Host ID	Part	Org	Capacity	Current Expiration	New Expiration	Grace Period (days)	Host Eligible	Suggested Parts
☐	Qnx-TITAN-0817-3AA6-3161-5585	JACE-8000	Tridium, Inc.	11,250	27-Sep-2023	07-Oct-2023	9	✓	[ESMA_GRACE]
☐	Qnx-TITAN-07D9-27D6-77DE-F7A5	JACE-8000	Tridium, Inc.	250	15-Mar-2023	07-Oct-2023	205	✓	[ESMA_GRACE]
☐	Qnx-TITAN-05B7-501D-4FF9-D1A6	JACE-8000	Tridium, Inc.	10,000	10-Oct-2019	07-Oct-2023	363	✓	[SMA-8200-3YR]
☐	Win-5844-3ABA-ECCF-9678	T-SEC-DEMO	Tridium, Inc.	0	-	-	0	✗	Not Eligible: License is a DEMO license
☐	Qnx-TITAN-3077-1E10-0979-9B26	JACE-8000	Tridium, Inc.	0	20-Jul-2024	-	0	✗	Not Eligible: Maintenance already covered
☐	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

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.

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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

✓ OK   ✗ CANCEL

Next, you want to click the pencil next to Portofolio 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

✓ OK   ✗ CANCEL

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

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	Host ID	Part	Org	Capacity		Current Expiration	New Expiration	Grace Period (days)	Host Eligible	Suggested Parts
☐	Qnx-TITAN-0817-3AA6-3161-5585	JACE-8000	Tridium, Inc.	11,250		27-Sep-2023	07-Oct-2023	9	✓	[ESMA_GRACE]
☐	Qnx-TITAN-07D9-27D6-77DE-F7A5	JACE-8000	Tridium, Inc.	250		15-Mar-2023	07-Oct-2023	205	✓	[ESMA_GRACE]
☐	Qnx-TITAN-05B7-501D-4FF9-D1A6	JACE-8000	Tridium, Inc.	10,000		10-Oct-2019	07-Oct-2023	363	✓	[SMA-8200-3YR]
☐	Win-5844-3ABA-ECCF-9678	T-SEC-DEMO	Tridium, Inc.	0		-	-	0	✗	Not Eligible: License is a DEMO license
☐	Qnx-TITAN-3077-1E10-0979-9B26	JACE-8000	Tridium, Inc.	0		20-Jul-2024	-	0	✗	Not Eligible: Maintenance already covered
☐	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

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

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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.

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.

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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?

✓ YES   ✗ NO

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

✓ OK   ✗ SKIP

✓ ESMA Proposal successfully submitted

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

OK

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View a submitted proposal

View a submitted proposal

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

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.

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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] [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.

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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%

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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%

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Edit an existing proposal

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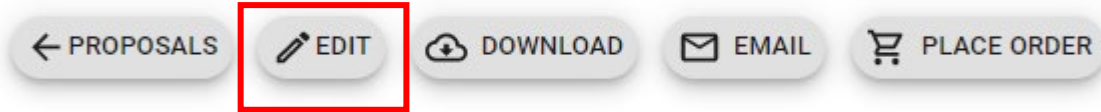
You do have the ability to Edit existing proposals. After clicking the Edit button, you can change the Enrollment Start Date and Duration on the top table:

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 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 11/23/2022
Enrollment Duration (years)	5 years ▾
Enrollment Expiration Date	Dec 1st, 2025

+ ADD —

	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-07D9-27D6-77DE-F7A5	JACE-8000	250	15-Mar-2023	253	[SMA-8005-3YR (1)] [SMA-8005-1YR (1)]
☐	Qnx-TITAN-0817-3AA6-3161-5585	JACE-8000	11250	27-Sep-2023	57	[SMA-8200-3YR (1)] [SMA-8200-1YR (1)]
☐	Qnx-TITAN-3077-1E10-0979-9B26	JACE-8000	250	20-Jul-2024	125	[SMA-8005-3YR (1)]
☐	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
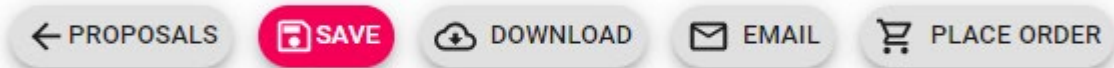
Win-53E3-BB90-CC2D-3970

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 —

	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-07D9-27D6-77DE-F7A5	JACE-8000	250	15-Mar-2023	253	[SMA-8005-3YR (1)] [SMA-8005-1YR (1)]
☐	Qnx-TITAN-0817-3AA6-3161-5585	JACE-8000	11250	27-Sep-2023	57	[SMA-8200-3YR (1)] [SMA-8200-1YR (1)]

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After completing your changes, click Save

Confirm that you want to continue

And click OK

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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)]

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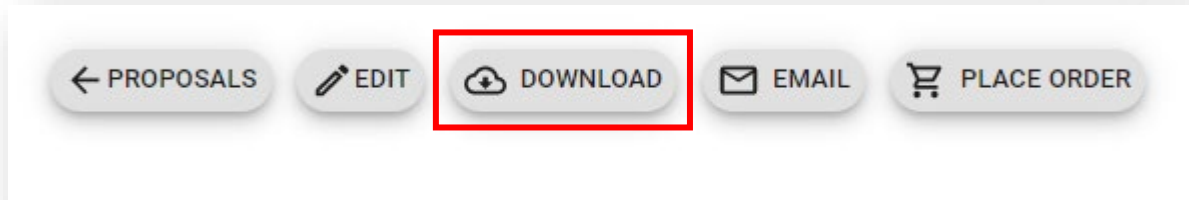
The tool allows you to download an Excel file with all the proposal info.
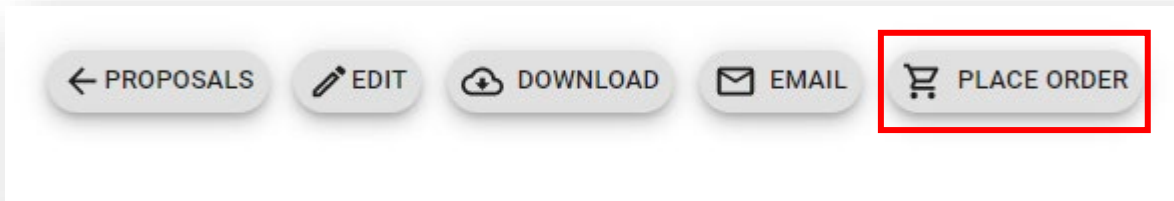
Microsoft Excel
97-2003 Workshee

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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

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

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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

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CREATE PROPOSAL   SUBMITTED PROPOSALS

ESMA Proposal #359 - Yale University   ← PROPOSALS   ✓ SUBMIT   ⊕ DOWNLOAD   ✉ EMAIL

Portfolio	Yale University
Address	300 Ceder ST New Haven, CT 06519 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)	1 year ▼
Enrollment Expiration Date	Mar 23rd, 2023

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

☐ 🗑 Qnx-TITAN-018F-AF6E-9F0D-4C39	J-8100	0	0	Not Eligible: License enrolled in prior proposal
☐ 🗑 Qnx-TITAN-05A3-876C-C063-CBB1	JENE-PC8025	0	0	Not Eligible: License enrolled in prior proposal
☐ 🗑 Qnx-TITAN-07B3-F782-8144-A464	J-8005	0	0	Not Eligible: License enrolled in prior proposal
☐ 🗑 Qnx-TITAN-0988-335F-4C98-83C1	JENE-PC8100	0	0	Not Eligible: License enrolled in prior proposal
☐ 🗑 Qnx-TITAN-0F5F-53B3-1114-33B8	J-8025	0	0	Not Eligible: License enrolled in prior proposal
☐ 🗑 Qnx-TITAN-1447-5398-78FD-A795	JENE-PC8025	0	0	Not Eligible: License enrolled in prior proposal
☐ 🗑 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

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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

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

- The next window will look like below

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

- Once the user clicks Ok a new window will open

- 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!