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Building a Centralized License-Management Solution at the University of Pennsylvania

The Goal

The University of Pennsylvania (or Penn) is a private Ivy League university in Philadelphia, PA. Originally founded by Benjamin Franklin, Penn is one of the oldest higher-ed institutions in the US with students from approximately 100 countries and every U.S. state. It is consistently ranked among the top universities in the country and enrolls 10,000 undergraduate students and an additional 10,000-plus students to its world-renowned graduate and professional schools.

Penn has historically operated in a highly decentralized way. Each of the university's 12 schools and numerous centers enjoys a great deal of autonomy. Such decentralization, however, was a challenge in the management of software licenses. Feedback from Penn's community indicated that licensing and distributing software were often sources of confusion and inefficiency. The process also wasn't scalable enough to handle the rapid proliferation of software licensed by the institution considering new, more complicated licensing models and compliance requirements.

"We typically embrace our decentralization," explains Christopher Bradie, Associate Vice President at Penn who has oversight of its Office of Software Licensing. "But when it came to the issue of licensing and software acquisition and negotiating the related contracts, the challenges were quite pronounced."

It was decided that Penn should re-evaluate how software was licensed, managed, and distributed at the university. Their main goals were to increase scalability, streamline processes, and provide a more seamless acquisition experience for the campus community.

"We were not looking to tweak the systems that we had," says Bradie. "We were looking not just for fundamental change on a small level, but something that was actually transformational."
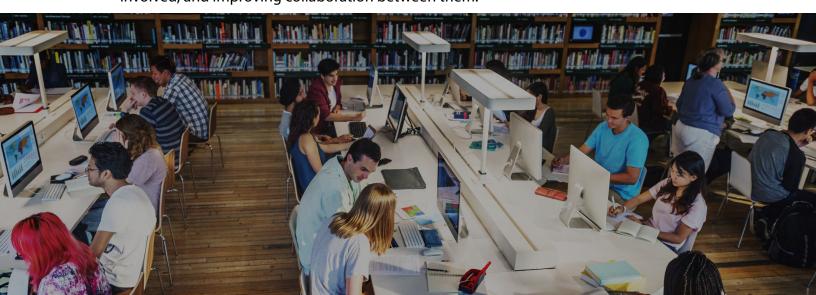
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The Challenge

Penn's Office of Software Licensing identified several challenges related to the licensing and distribution of software at the university. Whatever new solution the school developed to manage software would need to lay the groundwork for accomplishing the following:

- **A One-Stop Shop for Software**

  The university's decentralized approach to licensing made it difficult for stakeholders to obtain software. With various schools and centers licensing and distributing software independently of the Software Licensing Office (OSL), there was no single place faculty and staff could turn to and it was unclear where they had to go to obtain any given product. "Just knowing where to acquire a license was difficult," says Bradie. "You could not take it for granted that you could go to the Office of Software Licensing and find the product you were looking for." Penn wanted to develop a one-stop shop where faculty and staff could obtain the license or be pointed to the appropriate source. Additionally, Penn had contracted with a third-party vendor to manage and distribute certain titles, which needed a means of accommodating those transactions.

- **Streamlined Administration**

  Penn's approach to licensing software made it difficult to manage licenses as well as to access them. In addition to being decentralized, the process was manual. "Fundamentally, it was still a very people-oriented process," says Bradie. To address this issue, Penn wanted a solution that would streamline staff workloads by automating processes, reducing the number of stakeholders involved, and improving collaboration between them.

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- **Risk Management**

  Compared to when Penn's licensing office was first created, eligibility and usage restrictions became increasingly complex over time. It used to be simple – anyone who worked at the university was entitled to the same products at the same pricing. Now, terms and pricing varied almost by product – and software vendors were auditing for compliance more rigorously. Penn needed a platform that could automate eligibility verification and promote compliance with an increasingly intricate web of licensing terms and conditions.

- **A "Future-Proof" Solution**

  Penn wasn't just looking for a solution that could meet their current needs. They needed a solution that could be scaled to support greater volumes of software in the future. The solution would have to be flexible enough to accommodate a variety of product types beyond what the institution currently offered. As Bradie puts it: "We had a 20th-century solution that was not fit for the 21st-century world." Recognizing this, Penn wanted their new solution to be as future-proof as possible.

The Solution

Penn launched a comprehensive investigation and review process to find a versatile solution for managing and distributing software licenses.

To ensure an informed and comprehensive approach, Penn worked with outside consultants and examined what other schools were doing, while ensuring all key internal stakeholders had a voice at the table. Endeavors of this scope can be arduous, particularly for decentralized institutions. However, in this case, the process was accelerated by widespread agreement that there was a problem and on what was needed to fix it.

"There was a consensus among the community that there was a common problem that needed to be solved,"

says Bradie. This consensus led to the needed level of buy-in to implement a new scalable platform that could accommodate a variety of acquisition and distribution options. The product that was ultimately selected was Kivuto Cloud.

Kivuto Cloud is a central platform through which schools can manage and distribute any type of digital resource to students, faculty, and/or staff. The platform makes it easy for staff to manage licenses and end users to access software. It is also scalable and flexible enough to support any quantity of software under any combination of licensing models – all through a single, school-branded portal.

The Results

Today, Penn uses Kivuto Cloud to manage and deliver over 100 software titles under a variety of licensing and distribution models – all through a single, central platform branded to their institution. Building on the success to date, the university plans to expand the catalog of software offered through the platform by welcoming its schools and centers to leverage the versatility and scalability of the platform—thereby bringing the institution closer to the "one stop shop" that the community envisioned.

Penn's move toward a more centralized software-management solution is an ongoing process – a "journey," as Bradie puts it. However, Kivuto Cloud has put the university in a very strong position to realize their vision. Here's how:

- **A One-Stop Shop for Software**

  Kivuto Cloud provides a single, central location where faculty and staff can obtain software in one stop, regardless of which center it's licensed for and what model it's licensed under. Users can even use Kivuto Cloud to seamlessly obtain software distributed by third-party resellers. This has moved Penn closer to the goal of a one-stop-shop by making it much easier to find software by taking all the guesswork out of where to get it. The platform has gone beyond simply consolidating all software on one site. Leveraging Penn's single sign-on (SSO), Kivuto Cloud can filter products, so each user sees only the specific software they're eligible for. This allows for the platform to be easily navigable, further reducing confusion and frustration.

- **Streamlined Administration**

  Kivuto Cloud centralizes license management, automates processes, and eliminates the work of manually distributing software offered through it. As Penn leverages the platform to offer more software in the future, they'll be able reduce the time, effort, and redundant stakeholders

involved in license management. "With the Kivuto platform, our schools and centers have a new option they can leverage—one that allows them the flexibility to do as much (or as little) management of the software contract, license, title, and distribution as they believe necessary to accommodate the needs of their constituents," says Bradie. "That is why we embraced this solution versus several other models that we looked at."

- **Risk Management**
  Kivuto Cloud supports compliance with eligibility restrictions by automatically filtering what each user sees based on their unique eligibility. The platform also enables schools to apply custom EULAs to offerings, which has given staff unprecedented control over who can use what software, how they're permitted to use it, and for how long. "This is a level of stewardship over software that facilitates Penn's compliance with even the most complex licensing terms while reducing the risk of incurring penalties from compliance-auditing vendors.

- **A "Future-Proof" Solution**
  Penn's previous approach to software licensing was too labor-intensive to be scalable and was already struggling under current requirements. Now the university has a platform that is flexible enough to support modern licensing models and scalable enough to offer any quantity of software Penn may license in the future.