

## Software Distribution

### Guidance of Software Deliverable Material (DM) Numbers

This document provides an overview of the business rules, access controls, and audit considerations that govern the creation and use of Deliverable Material (DM) Numbers aka Product IDs within SAP for Software.

#### Definitions:

- **Deliverable Material (DM):** A unique SAP identifier for Deliverable items. This includes technical documents, marketing documents, software, trainings, and meetings. In the SAP Product report this is referred to as a “Material ID”. In ECM this is sometimes called a “Product ID”.
- **Desktop Software:** Software that is transmitted to a member and installed on their computer, usually downloaded from [epri.com](http://epri.com). Access and license terms may vary, but typically the software is available to the member as long as their company is an EPRI funder and the product is active.
  - Managed with one DM number:
    1. **Software Product ID:** Identifies the specific product, links to the EPRI.com abstract, and maps to the portfolio year in which the software is developed by default.
- **Subscriber Web Site (SWS):** Software that is hosted by EPRI (typically on [EPRI.com](http://EPRI.com)) which the user accesses via their network. This software is available on an annual basis to active funders. Access is updated annually in December and April: December adds access for the upcoming year. April removes prior year access.
  - Managed with two DM numbers:
    1. **SWS Product ID:** Identifies the specific product, links to the EPRI.com abstract, and maps to the portfolio year in which software is completed, connecting URL to active year.
    2. **SWS Access ID:** Used to control access and maps to current-year funders. Links to the website URL, connecting funders to active year. Software project managers are not required to manage or track this number but should be aware of it.

#### Desktop Software: When & Why a New DM is required

A new Product ID is needed for each new version of the product provided to funders. In addition, a Product ID is required for any beta version.

As an exception, in certain cases where changes are necessary for ancillary material (e.g. a correction to a user manual), and with SQA and manager approval you may use the original Product ID.

#### Additional Considerations

- **Reuse risks audit confusion:** who received what, what files were delivered, etc.
- All software are filed in EPRI Software Center’s ECM folders by DM number, name and version

- If the product price or license terms are changed (which requires legal approval), it may be considered a different product to differentiate what has been purchased and may need a different Product ID.

### **Subscriber Websites (SWS): When to Reuse or Create a New DM**

Any significant update requires a new SWS Product ID. This is because:

- SWS Product ID maps to a single year.
- It improves reference documentation materials for the members.
- Software version records are maintained by EPSC in ECM by Product ID.

Content-only changes to the SWS, editorial updates such as fixing broken links or updating contacts, or incidental changes due to security patches are not significant changes and do not require a new SWS Product ID. Access is updated annually so a new SWS Access ID is not required for software updates unless a subset of the site is changing access, such as:

- A new restricted-access page is created for a subset of funders.
- An existing page is being made available to the public.

### **Summary**

#### **When a New Number Is Required**

- **Functional changes** for desktop and SWS that require SQA testing.
- **Funding-year changes for SWS** (e.g., 2026 funds used to update a 2025 product).
- **Pricing changes** for desktop software that could cause fairness or legal issues.
- **Audit clarity issues** where reuse could obscure versioning or delivery history.
- **Portfolio year differences** – SAP enforces year-to-year separation.

#### **When a New Number is Not Required**

- No changes to desktop or SWS software.
- Minor, **content-only updates to SWS** (calendar changes, PM name update, etc.).
- Patch releases that address **SWS** cyber vulnerability or remediation without adding functionality.