Microsoft Volume Licensing Reference Guide

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Microsoft | Volume Licensing

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CHAPTER 1: INTRODUCTION TO MICROSOFT VOLUME LICENSING

Acquiring software licenses through Microsoft Volume Licensing is different than acquiring retail boxed software licenses. A retail software license is usually sold in a box and contains media (floppy disk, CD-ROM, or DVD format), a user's guide, access to product support, and Microsoft Software License Terms (formerly known as the End User License Agreement or EULA). The Software License Terms dictate how customers can and cannot use the software.

Software acquired through Microsoft Volume Licensing is a software license only that gives users the right to run a Microsoft software product. Customers can save above retail boxed software prices when they participate in a Microsoft Volume Licensing program. By acquiring software licenses through Volume Licensing, you pay for only the software license and not for additional materials. With some Microsoft Volume Licensing programs, you can also purchase Microsoft Software Assurance for Volume Licensing. This single, cost-effective program can help boost organizational productivity with 24 hours a day, seven days a week (24×7) support, deployment planning services, user and technical training, and the latest Microsoft software releases and unique technologies.

When you acquire software through a Microsoft Volume Licensing program, you can choose to acquire media (or supplemental media), documentation, and product support separately via download or physical media as needed.

How to Use This Guide

This guide is an overview of the key features of Microsoft Volume Licensing programs. The information is presented by organizational type and size—two of the most important keys to determining your best Volume Licensing option.

The key chapters by organizational type are the following:

- Commercial Business
- Academic
- Government
- Charity
- Software and Service Partners

Each chapter also contains information about the additional benefits and resources that are available with each program, such as software asset tracking tools, maintenance programs, and online management services. At the end of each chapter is a quick feature comparison chart and an online selection tool.

In addition, separate chapters provide overviews of the following two key areas that apply to all Volume Licensing programs in varying manners and are worthy of a more in-depth understanding:

- Product Use Rights (PUR), which provides an overview of product-specific terms and conditions that govern how Microsoft products can be used in the Volume Licensing programs

- Software Assurance, which helps customers boost productivity across their organizations by providing new product versions, deployment planning, support, training, and unique technologies in one cost-effective program

Keys to Understanding Microsoft Volume Licensing

The following are a few key organizational characteristics to help you understand Microsoft Volume Licensing policies and programs and to choose the best option for your organization:

- The size and type of your organization

- The products you want to license

- The way in which you want to use those products

Programs for Your Organization Type and Size

At the most elementary level, Microsoft Volume Licensing program models address organizations in the following two main categories:

- Organizations with more than five but fewer than 250 computers

- Organizations with more than 250 computers

For organizations with fewer than 250 computers, the Microsoft Open Programs provide volume discounts for a minimal up-front cost and are widely available through the worldwide partner channel. Open Programs provide the following three purchasing license options for commercial businesses:

- **Open Value** is for organizations with as few as five desktop PCs and offers the advantages of Software Assurance, simplified license management, and an annual payment structure. The Open Value program offers three options: Company-wide, Non–Company-wide, and Open Value Subscription.

- **Open Value Subscription** is for customers who want to subscribe to, rather than acquire, Microsoft product licenses. Available in select regions, Microsoft Open Value Subscription provides the lowest up-front costs of the Open Programs with the flexibility to reduce their total licensing costs in years when their desktop PC count declines.

- **Open License** is for customers who want a minimum initial purchase of only five software licenses. This program is ideal if you prefer to pay-as-you-go and change your licensing program as your business grows. You can qualify for volume purchasing under the volume feature of Open License. Open volume purchasing is for customers who can meet minimum purchase levels using a system of product pools and points. With an entry minimum of 500 points from a single product pool, this program offers deeper discounts for a greater savings.

For organizations with 250 or more desktop PCs, Microsoft offers the following options:

- **Microsoft Select Plus** is for midsize and large organizations with 250 or more desktop PCs with multiple affiliates that want to license software and services at any business unit level while still getting the price saving advantages of being a single organization.

- **Microsoft Enterprise Agreement (EA)** is for larger organizations that want to standardize their desktop IT across the enterprise, but retain the flexibility to purchase Microsoft software licenses and cloud services for different types of users. Based on a three-year enrollment term, it provides the deepest pricing discounts and the advantages of Software Assurance.

- **Microsoft Enterprise Subscription Agreement (EAS)** is a Volume Licensing program for large organizations that want to subscribe to—rather than purchase—Microsoft software licenses. This program provides similar advantages as the Enterprise Agreement with a lower initial cost based on a three-year subscription and the ability to increase or decrease subscription counts on an annual basis. However, unlike the EA where you retain perpetual use rights for the licenses you purchase, with this subscription agreement, you gain access to Microsoft software for only as long as you maintain your subscription.

In addition to size, you need to consider your organization's primary function. For example, additional discounts are given to some public sector organizations such as schools and universities.

Programs for Public Sector and Other Organizations

For public sector organizations with fewer than 250 PCs, Microsoft offers customized versions of the Open Programs: Open License, Open Value, and Open Value Subscription. The Open License for Academic and Open License for Government programs are similar to the commercial Open License program, but with different pricing and partner channels. In some regions, government organizations can also participate in the Open Value for Government and Open Value Subscription for Government programs. In some regions, charitable organizations can participate in the Open License for Charities program. Check with your Microsoft reseller for availability.

Government and education organizations with more than 250 PCs can participate in the Select Plus program. Government organizations can also participate in the Enterprise Agreement program.

For education institutions that prefer to license their software on an annual subscription basis, Microsoft offers two unique programs: Microsoft Enrollment for Education Solutions (for higher education

institutions and primary/secondary schools) and Microsoft School Enrollment (for primary/secondary schools only).

Microsoft also offers programs that can meet the specific needs of organizations that partner with Microsoft to provide additional software and services, such as the Microsoft Independent Software Vendor (ISV) Royalty Licensing Program and the Microsoft Services Provider License Agreement (SPLA).

LICENSING ON-PREMISES SOFTWARE

Another key factor to consider—aside from organizational type and size—is which products you need to license. Different product families require different licensing models. For example, a desktop PC program, such as any Microsoft Office 2010 suite, requires a license for each device that is running the program. Customers can install any number of copies and any prior version on the device or on a network device.

A desktop PC operating system, such as the Windows 7 operating system, requires a license for each device accessing the licensed product (locally and remotely). Note: Only one copy can be installed on the device.

In Volume Licensing, the desktop PC operating system license is an "upgrade license." You can only acquire upgrade licenses for devices for which you have already licensed a "qualifying operating system," either preinstalled on a PC through a PC manufacturer or as full-package product (FPP) from retail. The Product List shows the "qualifying operating systems" that qualify for an upgrade license and is available at the Volume Licensing website at http://www.microsoft.com/licensing/about-licensing/product-licensing.aspx#tab=2.

Meanwhile, most server products require a license for each running instance of the server software you run on a server—whether in a physical or virtual operating system environment (OSE). However, some products provide broader use rights. For example, a Windows Server 2008 Enterprise operating system license permits a running instance in up to four virtual operating system environments, plus one host instance on the physical device at a time on the licensed server. With some products, such as Windows Server 2008 Datacenter, any number of instances can run simultaneously as long as each physical processor is licensed on the licensed server.

Server operating system products require a Microsoft Client Access License (CAL) for each user or device that accesses the server software. CALs are version specific and must be the same version or later than the server software being accessed. CALs permit access to servers licensed by the same entity. They do not permit access to another entity's licensed servers.

In addition, conditions apply to how certain products can be used—such as web servers, which must be used only for web-based applications.

Licensing Microsoft Cloud Services

In addition to traditional on-premises software licenses, Microsoft offers subscriptions to cloud services through the Microsoft Online Services Program (MOSP). How you add cloud services through your Volume Licensing agreement depends on the following two factors:

- The type of Volume Licensing agreement you have

- The date that specific cloud services are made commercially available

Today, you can add the Microsoft Business Productivity Online Suite (BPOS), Microsoft Dynamics CRM Online, or other communication, collaboration, or security services such as Microsoft Office Live Meeting or Microsoft Forefront Client Security to your EA, EAS, or Enrollment for Education Solutions.

In October 2010, Microsoft announced Microsoft Office 365, a new cloud-based offering that combines the familiar Microsoft Office desktop suite with online versions of Microsoft's next-generation communications and collaboration services, which include Microsoft SharePoint Online, Microsoft Exchange Online, and Microsoft Lync Online. While available today only in limited beta in certain markets (commercial availability in 2011), this new cloud service offering will be significant to Microsoft Volume Licensing customers because it includes important changes to the EA, EAS, and Enrollment for Education Solutions Volume Licensing programs. See *Chapter 2 Choosing a Volume Licensing Program for Your Organization* for more details.

Microsoft Financing

Microsoft Financing provides commercial and public sector customers with an affordable and predictable way to acquire the IT solutions that businesses need to help cut costs and increase efficiencies. Microsoft Financing can help you focus on what matters most: finding the best IT solution to support the success of your business.

Microsoft works with multiple financing providers in 14 countries around the world to offer world-class financing solutions under the Microsoft Financing brand. Our solution partners work with you to define your technology-related business needs and objectives, set up a payment structure that works with your budget, and help you maintain cash flow.

The Microsoft Financing program helps customers by providing one financing resource for all their IT needs, including software, services, or your product offerings. For organizations that already license software from Microsoft, flexible payment options are convenient and allow them to spread out the costs of the software during an extended period of time, thus preserving cash resources.

We offer a simple and easy method of lending without any additional fees. Typically, no down payment is required, and terms range from two to five years, making it easy to match your payments to your business operations and immediately begin to realize IT benefits.

Microsoft Financing helps you be strategic with your IT purchases in the following ways:

- Get the IT solution you need to achieve business goals.

- Manage software, services (such as deployment), partner products, and hardware as one investment.

- Align IT benefits with costs.

- Enjoy a fast, easy, and responsive lending process.

Find out how a predictable and affordable payment structure can help you get the IT you need and stay on budget. Visit the Microsoft Financing home page at http://www.microsoft.com/financing/ for more details.

CHAPTER 2: CHOOSING A VOLUME LICENSING PROGRAM FOR YOUR COMMERCIAL ORGANIZATION

Microsoft Volume Licensing programs are available for commercial businesses of all sizes.

Microsoft offers a variety of programs to help businesses manage how they purchase software licenses. These programs cover everyone, from smaller organizations with a handful of desktop PCs to multinational organizations that manage tens of thousands of client and server units.

Volume discounts are the most obvious benefit of these programs. But Volume Licensing programs also help organizations with the following tasks:

In this chapter...

- Microsoft Open Programs
- Microsoft Select Plus Agreement
- Microsoft Enterprise Agreement
- Microsoft Cloud Services
- Comparing Volume Licensing Programs

- Tracking software use to ensure legal compliance

- Deploying updates and new versions, especially on desktop PCs

- Organizing software license purchasing through centralized purchasing practices

In general, Microsoft Volume Licensing commercial programs align to two main categories: programs for companies with fewer than 250 desktop PCs and programs for companies with more than 250 desktop PCs.

For organizations with up to 250 desktop PCs, the Microsoft Open Programs: Open Value, Open Value Subscription, and Open License have flexible, low-entry requirements. Open Programs offer three choices to meet an organization's specific needs, and they are all available from resellers, solution providers, and online vendors.

For organizations with 250 or more PCs, Microsoft offers the Microsoft Open Value, Open Value Subscription, Microsoft Enterprise Agreement, Enterprise Subscription Agreement, and Select Plus options through Microsoft Large Account Resellers (LARs) and Microsoft Enterprise Software Advisors (ESAs). Both LARs and ESAs offer flexibility in payment schedules.

All organizations can also subscribe to Online Services through the Microsoft Online Subscription Program.

Microsoft Open Programs

Organizations with Fewer than 250 Desktop PCs

Open Program offerings are a convenient and simple way for corporate, academic, charity[1], and government[2] organizations with at least five desktop PCs to acquire the latest Microsoft technology. These offerings provide volume discounts for a minimal up-front cost and are available broadly through a worldwide partner channel. Although Microsoft Open Programs are available to any size organization, they are most often used by organizations with fewer than 250 desktop PCs. The Open Programs offer many benefits, including the following:

- **Simplicity.** Start using licensed products as soon as your order is placed through the Open License pay-as-you-go model.

- **Affordability.** All Open Programs offer flexible payment options so that you can stretch your software procurement budgets further than retail license purchase options.

- **Flexibility.** A broad worldwide partner channel ensures that you have convenient and fast access to thousands of software titles.

- **Value.** Manage licenses easily and conveniently through the Microsoft Volume Licensing Service Center (VLSC).

Engineering Firm Lowers Licensing Costs 27 Percent and Gains Value

Civil engineering firm, Aas-Jakobsen in Oslo, Norway, wanted to provide its staff with the tools to maintain a high level of productivity. The firm standardized on Microsoft software, and as its staff grew to 90 people, wanted to reduce its software licensing costs.

Working with OfficeTeam, a Microsoft Gold Certified Partner, the firm acquired a Microsoft Open Value Subscription with the single-platform option. Through this subscription, Aas-Jakobsen pays a fixed cost per desktop for the operating system, Microsoft Office Professional, and CALs for core server products. The firm can add or subtract PCs or upgrade products covered under the subscription without changing the cost per desktop.

As result, Aas-Jakobsen reduced desktop administration time by 25 percent, lowered licensing costs by 27 percent, and gained more value and predictable licensing costs.

To read the full story, visit http://www.microsoft.com/casestudies/Case_Study_Detail.aspx?CaseStudyID=4000006147.

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[1] Not available for charitable organizations in all regions. Check with your reseller regarding availability in your country.

[2] Open Value for Government is an option for government organizations with up to 250 desktop PCs.

MICROSOFT OPEN PROGRAM FAMILY: THREE OPTIONS

Microsoft Open Programs provide multiple purchasing options, including Open Value (Company-wide or Open Value Non–Company-wide), Open Value Subscription, and Open License.

Open Value

The Open Value program is a flexible and affordable way to use and manage Microsoft licensed products under a single agreement. The program is a three-year term commitment that includes Software Assurance as a fixed benefit. The Open Value program has the following three options to choose from.

Company-wide Option: Open Value Company-wide offers commercial and government organizations additional savings when they standardize all of their desktop PCs on one or more Microsoft enterprise products. With this single platform option, you can customize your desktop PCs by choosing separate components, including the operating system, Microsoft Office 2010 suites, and CAL product pools, plus additional software products selected in your agreement that include the following platform product options.

- Microsoft Office 2010 suites: Microsoft Office Professional Plus 2010 and Microsoft Office Standard 2010

- Operating System: Windows 7 Professional Upgrade

- Client Access License: Microsoft Core CAL Suite for Windows Server, Windows Small Business Server CAL Suite, and Enterprise Business Server CAL Suite

The Open Value Company-wide option includes discounts on company (organization)-wide deployment.

Non–Company-wide Option: If you need licenses for servers or for a limited number of desktop PCs, you can open a Non–Company-wide Agreement for any product license purchases.

Open Value Subscription

Open Value Subscription offers flexible annual payments tied to the number of desktop PCs you have and the lowest up-front costs. The benefits include:

- Additional savings in the first year if you have current or previous versions of company-wide licensed products.
- The option to add the company-wide licensed products you have selected on new desktop PCs throughout the year at no additional cost for that year.
- Lower payment through the years as your desktop PC count declines.

Like the Company-wide option, the Subscription option offers the Single-Platform option to standardize desktop PC software across your organization with a customizable platform that allows you to mix and match components.

Platform Option

With both Open Value Company-wide and Open Value Subscription, you can choose to standardize desktop PC licensed products across your organization on all three components on the platform (the operating system, Microsoft Office 2010 suites, and CAL product pools) and receive additional savings. The platform option provides the simplest way to manage desktop PC licenses because you do not need to track which version is installed on which desktop PC.

Open License

Open License is a two-year term commitment that is ideal for organizations that want a minimum initial purchase of five software licenses. This program is also great for a growing organization's changing business needs because it has a pay-as-you-go model.

Open License Volume Purchase Option: If you are purchasing larger volumes of Microsoft software licenses but still prefer to pay as you go, the volume option is a two-year term commitment with product pools and points. It provides deeper per-unit discounts, resulting in significant savings if the volume of software licenses is high enough.

To participate in the Open License Volume Purchase option, you must meet a minimum purchase level of 500 points. Points are determined by the software product mix and license quantity you plan to purchase. Because the volume option uses product pools and points to calculate the 500-point minimum purchase, it is important to understand the product pools and points formula.

Product pools group similar Microsoft software products to achieve deeper volume pricing discounts. The following are some examples:

- The **applications** pool includes products such as the Microsoft Office 2010 suites, Microsoft Project 2010, Microsoft Visio 2010 drawing and diagramming software, and the Microsoft Visual Studio development system.

- The **systems** pool includes the Windows operating system upgrades such as Windows 7 Professional.

- The **server** pool includes products like Windows SQL Server Standard Edition database software and Microsoft Exchange Server.

Point values are assigned to each licensed product. For example:

- Microsoft Office Professional Edition is worth four points.

- Windows Server 2008 is worth 20 points.

By adding the number of points earned, you can determine whether you meet the minimum purchase requirement. For a full list of point values, visit the Microsoft Volume Licensing website at http://www.microsoftvolumelicensing.com.

Microsoft Select Plus Agreement
More Value for Midsize to Large Organizations

The Microsoft Select Plus license program is ideal for midsize and large organizations with 250 or more desktop PCs that also have mixed software requirements. In addition, it is ideal for customers who want transactional license purchasing. Select Plus increases purchasing flexibility with automatic price savings based on purchase volume across the entire organization, improves asset management, and gives you the ability to license and manage your software assets and services at the organization, affiliate, or department level.

Select Plus offers many benefits, including the ability to do the following:

- **Manage assets more easily** with visibility across the entire organization and centralized reporting because all affiliate purchases are tied to their own unique customer IDs.
- **Get more value out of licensing** with automatic price savings for purchases across the entire organization and the full value of Microsoft Software Assurance coverage, no matter when you purchase it.
- **Streamline the contract process** with a single organization-wide agreement that never expires, Software Assurance alignment, and licensing consolidation.

Learn more about Select Plus at the Volume Licensing website at http://www.microsoft.com/licensing/licensing-options/select.aspx.

AGREEMENT STRUCTURE

The Select Plus Agreement provides greater flexibility for enrolled affiliates located in different countries and regions. Purchasing is independent, yet consolidated under one master program. Select Plus consists of the following three components:

- **The Microsoft Business and Services Agreement (MBSA)** defines contract terms common to Microsoft licensing, service, and support agreements. Customers need to sign this required master agreement only once with or prior to the Select Plus Agreement.

- **The Select Plus Agreement** enrolls your organization in the Volume Licensing program so that you can purchase product licenses and services at volume discount prices.

- **The Select Plus affiliate registration form** identifies buying affiliates within your organization and enrolls them in the program. As a result, they can acquire software licenses and services

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under the Select Plus Agreement. You must have at least one lead affiliate registered using this form (additional forms are optional).

HOW TO DETERMINE PRICING LEVELS

Select Plus categorizes software products into three distinct product pools: applications, systems, and servers. A unique customer ID is established with the public customer number (PCN) of an organization's lead affiliate and associated with the PCNs of any number of affiliates, linking them to the same agreement. This framework is used to calculate price levels according to the organization's volume purchases and helps streamline purchasing. The price level for each pool is based on product points that you earn for automatic-tiered discount levels. Your organization has one year from the time of initial order to reach 500 points. A single order of 500 points is required to reactivate a pool that is on hold.

The points for each of the four price levels are listed below.

Price Level	Point Minimums at Each Annual Compliance Check
A	500
B	4,000
C	10,000
D	25,000

POOLS AND POINTS

Each software product carries a point value. For example, Office Professional Plus 2010 is worth 2 points, Microsoft Online Services Subscription is worth 1 point, and Windows Server 2008 R2 is worth 15 points. The Software Assurance component of License & Software Assurance is worth half the total point value of its accompanying license annually. For example, if Office Professional Plus 2010 is worth 2 points, Software Assurance is worth 1 point for each year it is maintained during the term of the Select Plus Agreement.

You can acquire points for each product pool with the following three options:

- Acquire new licenses.

- Acquire License & Software Assurance.

- Renew Software Assurance for products already covered with License & Software Assurance from a previous order or where Software Assurance is purchased based on the eligibility rules.

Your organization automatically moves to a lower price level when either of the following occurs:

- You increase the amount you spend through your Select Plus Agreement and purchase enough points to take you to the next price level.

- You associate your Select Plus Agreement with an existing commercial or government Enterprise Agreement or Select License Agreement that has a lower price level.[3]

PRICE LEVEL ADJUSTMENTS

You do not need to comply with annual point minimums if your Select Plus Agreement associates with an active EA or Campus and School Agreement (CASA). However, if you used your Select Plus Agreement with a Select License Agreement to set the initial price level, you must meet the point minimums for each subsequent annual compliance check.

Your initial order, which can be submitted by a registered affiliate, qualifies your organization for the corresponding price level. After you qualify for a price level, you can purchase at that level for the remainder of the year or until you qualify for the next price level through increased purchase volume. You attain the next price level for a pool as soon as your organization meets the corresponding point minimum. Price levels for each product pool are reviewed every year on the agreement anniversary date. This price level adjustment does not apply to customers who are eligible for government or academic pricing.

You achieve the higher discount price level as soon as your organization meets the corresponding annual point minimums per pool. Purchases that registered affiliates made on your Select Plus Agreement are aggregated and continuously factored into point minimums per pool to achieve the most beneficial price level.

If you acquire points to meet the annual point minimums in a product pool during any given year, your organization's price level drops one level down for that pool the following year. You can only descend one level each year.

If you are at Level A and acquire or maintain fewer than 500 annual points in a product pool for a given year, your account is put on hold for that pool until you reach the 500-point level again. An order for the minimum annual points automatically reactivates the product pool, with no need to sign new forms or renegotiate the agreement terms.

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[3] Academic customers can also associate a Campus and School Agreement with a Select Plus Agreement.

Microsoft Enterprise Agreement

For Larger Organizations that Want to Standardize Their IT

Updates to the Enterprise Agreement programs help organizations integrate Microsoft cloud services with existing on-premises licensed software.

The EA is the best licensing vehicle for large organizations that want to standardize IT across the enterprise, yet retain the flexibility to purchase software and services for different types of users. And as more companies implement cloud services, the EA now provides a seamless way to license both on-premises software and online services to best suit their user needs and help them optimize their technology spend as business priorities change.

This overview describes in detail licensing for on-premises software such as defining enterprise products and describing how volume pricing levels are established. We also describe the key updates that we have made to the EA to address demand for cloud services.

ENTERPRISE AGREEMENT KEY ATTRIBUTES

At the onset of the agreement, pricing is based on a tiered volume discount structure, meaning the greater the size of your organization, the less you pay for an individual per-desktop or per-user license. If you add devices during your agreement, the per-device licensing costs remain the same or may be reduced given the EA's volume pricing levels during your three-year agreement term.

> **Tip...**
>
> Subscribing to software license coverage through the Enterprise Subscription Agreement potentially can provide financial benefits, because companies can treat it as an operational expenditure, which may provide tax savings.

The EA helps you simplify software licensing, budgeting, and administration with a single agreement through which you can manage all of your Microsoft software and cloud services. You decide which software and services to run on-premises or have hosted by a third party, based on user requirements and what is most cost-effective for your organization.

All Enterprise Agreements include Software Assurance benefits that you can use to plan deployments, ready your users for new software, and support Microsoft products and services without incurring additional costs.

You can spread the cost of your EA across three annual payments, helping you predict future budgets. If you add new users or devices during your EA, you can equip them with software and services you are already using and then account for these changes once a year, through an annual reconciliation process known as "True Up."

You should take advantage of Enrollment Programs that help you license solution-focused technology suites of Microsoft's most popular server products. They can be very cost-effective in purchasing software licenses and solutions to address key organizational objectives, like building a secure and well-managed

data center (Enrollment for Core Infrastructure [ECI]) or helping your IT staff build, manage, and maintain applications that support your business (Enrollment for Application Platform [EAP]).

You can choose to either purchase your software licenses via the EA or subscribe to licenses via the Enterprise Subscription Agreement (EAS). With the EAS offering, you have lower short-term costs and the ability to increase or downsize your subscriptions annually.

ENTERPRISE PRODUCTS AND PLATFORMS

Enterprise products include on-premises licenses for Microsoft core desktop products, such as Windows 7 Professional Upgrade, Office Professional Plus, and applicable Client Access License suites. Under the EA, they must be licensed on a company-wide basis and can be ordered as individual product components (also called a Component EA) or through Enrollments for the Professional Desktop Full Platform (sometimes referred to as a Platform EA) or the Enterprise Desktop.

The following enterprise products are included in the Professional Desktop Full Platform:

- Windows 7 Professional Upgrade
- Microsoft Office Professional Plus 2010
- Microsoft Core Client Access License Suite

The following enterprise products are included in the Enterprise Desktop:

- Windows 7 Professional Upgrade
- Microsoft Office Professional Plus 2010
- Microsoft Enterprise CAL Suite

The complete list of enterprise products is available on the Microsoft Product List at the Volume Licensing website at http://www.microsoft.com/licensing/about-licensing/product-licensing.aspx#tab=2.

ADDITIONAL PRODUCTS

You can choose from a broad selection of software titles, all available as additional products. When you purchase additional licensed products, you get the same License & Software Assurance coverage as for enterprise products, but you do not need to make an enterprise-wide commitment.

For products licensed at signing, you can spread out payments throughout three years in the same way that enterprise product payments are annualized. Spreading out the cost of software licenses throughout three years can help your organization refocus critical IT budget and provide predictability for budgeting purposes. Also, additional products included at signing have corresponding pricing for using the True Up ordering process, which has consolidated annual ordering.

Examples of software products available as additional products include Office Visio, Office Project, Windows Server, and Exchange Server. A complete list of additional products is available on the Microsoft Product List at the Volume Licensing website at http://www.microsoft.com/licensing/about-licensing/product-licensing.aspx#tab=2.

ADDITIONAL ENROLLMENTS

You can extend the value of your Enterprise Agreement with two new enrollments that help you purchase Microsoft technology. Both are Microsoft Enterprise Agreement enrollments for customers who want to simplify licensing, help reduce costs, and manage their core infrastructure more efficiently.

ENROLLMENT FOR APPLICATION PLATFORM

The Enrollment for Application Platform is a flexible, cost-effective licensing program for customers who want to standardize on the Microsoft Application Platform. With the EAP, you get the latest Application Platform products for new and existing deployments across the organization, which can lower up-front costs and offer savings of up to 40 percent on new IT solutions. In addition, EAP customers can manage their application platform server investments from a single enrollment.

How the Enrollment for Application Platform Works:

1. Select the products you want:
    - One or more products with minimum initial purchase requirement.
    - Establish your initial footprint based on your current install base.
    - 100 percent Software Assurance coverage on footprint for included products.
2. Receive the latest version of products:
    - Included products only.
    - Price of license deferred indefinitely on units not covered by Software Assurance on your initial footprint, as long as you remain in the program.
3. Deploy unlimited incremental units:
    - New incremental units receive price savings on license cost.
    - True up annually or at the end of your three-year term.
4. Choose the best True Up option:
    - One-Year True Up (incremental licenses purchased annually receive price savings).
    - Three-Year True Up (fixed payments with growth and Premium Edition mix built in).

ENROLLMENT FOR CORE INFRASTRUCTURE

The Enrollment for Core Infrastructure is a cost-effective way to license the Windows Server operating system, Microsoft System Center server management, and Microsoft Forefront Client Security together in a simple per-processor license. It is the ideal solution for acquiring the foundation for a protected, well-managed IT infrastructure because it provides you with the server platform, server management, and server protection you need to deliver more efficient, reliable, and flexible data center services. You can save 20 percent off purchasing the product licenses individually with the ECI. It also provides management and security at only 10 to 34 percent more than the Windows Server stand-alone price.

Three Core Infrastructure Server Suites are available only through ECI. You can select the quantity of each suite that best meets your virtualization needs and the workloads of your IT environment.

- Core Infrastructure Server Suite Datacenter supports an unlimited number of virtualized instances.
- Core Infrastructure Server Suite Enterprise supports up to four instances on a two-processor server.
- Core Infrastructure Server Suite Standard supports only one virtualized instance per processor.

For more information on both the Enrollment for Application Platform and the Enrollment for Core Infrastructure, see the Volume Licensing website at http://www.microsoft.com/licensing/licensing-options/enterprise.aspx.

AGREEMENT STRUCTURE AND DETAILS

The EA structure offers greater flexibility for enrolled affiliates located in different countries and regions. Purchasing is independent, yet consolidated under one master program. The EA structure includes the following three components:

- **The Microsoft Business and Services Agreement** is required. This is a master agreement that defines contract terms common to Microsoft licensing, service, and support agreements. The customer signs the MBSA only once with or prior to the EA.

- **The Enterprise Agreement** defines the terms for enterprise and additional product license acquisitions, subsequent orders, True Ups, and perpetual use rights.

- **The Enterprise Agreement enrollment** establishes the basic information that your organization can use to buy product licenses under the Enterprise Agreement. It defines purchase details like the term of the licensing arrangement, products, subsidiaries, language options, and ESA (or LAR, where applicable).

TERMS

Each Enterprise Agreement enrollment has a three-year term during which all the terms and prices of products covered in the initial order remain consistent. This means you can plan and budget for software license purchases up to three years in advance, reducing annual budget restrictions and easing fiscal year spending challenges. Each enrollment has the option for either a one- or three-year renewal term.

EXTENDED PAYMENT TERMS

With Extended Payment Terms from Microsoft, you can pay for your EA on a monthly, quarterly, bi-annually, or custom payment plan. Extended Payment Terms are automatically offered to all corporate EA customers (subject to credit approval). The benefits to Extended Payment Terms include the following:

Benefits of Extended Payment Terms

- **Greater flexibility and choice:** You benefit from more flexible payment terms (monthly, quarterly, bi-annual, or customized) without having a specific arrangement with Microsoft.

- **A quick and simple process:** Extended Payment Terms are activated through a simple and short amendment to your existing EA.

- **Ease of access:** Because the Extended Payment Terms option is embedded into the EA, you can choose from a range of payment terms according to your needs when you buy.

- **The ability to get more for your money**: Payments can be structured to fit within your budget cycles, so you can afford a more comprehensive solution today and pay for it across time.

Annual Price per Desktop PC

The annual price per desktop PC feature of the Enterprise Agreement provides a predictable fixed price that you can use to forecast desktop PC technology costs up to three years in advance. A payment (based on the pre-established price per desktop PC and initial order) is due each year at the anniversary date of your Enterprise Agreement enrollment. The predetermined price paid for software licenses covered in your initial order protects you from unanticipated price increases, making it easier to stay within your software license budget.

True Up

During the time you are enrolled in the Enterprise Agreement, your business will likely grow and you will add desktop PCs. When you add desktop PCs to your EA, they immediately get the same license coverage as the desktop PCs enrolled at the beginning of the enrollment term. You just report added desktop PCs through an annual process called a "True Up" order.

True Up orders consolidate orders for additional software licenses deployed during the year under one order annually (including the third year before any renewal). Customers can also true up multiple times throughout the year as an added benefit in managing costs.

This feature is in addition to the annual True Up required each year. The annual True Up feature helps reduce time and expense by consolidating the report of multiple additional software use under one purchase order. If you do not add desktop PCs during the year, an update statement is reported to alert Microsoft not to expect a True Up order.

STEP UP

With the Step Up License, you can upgrade to a later product edition without incurring the full cost of licensing two separate editions of software products. As a result, it is possible to migrate from Standard Edition software products to Professional or Enterprise Edition software products while maintaining Software Assurance coverage on a given product. For further details, please reference the *Enterprise Agreement Program Guide* at the Volume Licensing website at http://www.microsoft.com/licensing/licensing-options/enterprise.aspx.

HOW TO DETERMINE ON-PREMISE PRICING LEVELS

The total quantity of initial qualified desktop PCs when you enroll in the EA determines the price level of your enterprise products and any additional products that you license under the corresponding product pool.

Qualified desktop PCs are the personal desktop computers, portable computers, workstations, and similar devices that are used by or for the benefit of an enrolled affiliate (including affiliates in the enterprise) and meet the minimum requirements for running any of the enterprise products included in your agreement.

Qualified desktop PCs do not include any computers dedicated to run only line-of-business (LOB) software or any system running an embedded operating system (such as Windows 9.X embedded or Windows XP embedded).

As part of your enrollment, you are responsible for reporting the number of qualified desktop PCs in your organization. This number is the quantity you indicate on the initial order at signing, along with any additional desktop PCs added throughout the term of your enrollment, which would be covered by submitting the annual True Up order. (For an explanation of True Up, see the preceding section.)

The user count may be different than the quantity of desktop PCs, but the price level is determined by the desktop PC count. For example, a customer may have 500 desktop PCs and 400 users. The price level would be A for both, but the product order would indicate 500 for the Windows or Microsoft Office product, and 400 users for the User CAL purchases.

Customers who sign an Enterprise Agreement enrollment are referred to as "Enrolled Affiliates." An enrollment is a standard option that gives global companies greater flexibility in defining their enterprise. Each enterprise must consist of entire legal entities, not partial entities such as departments, divisions, or business units. Each affiliate must be entirely "in" or entirely "out."

The following are four price levels for each of the enterprise products:

Price Level	Desktop PCs
A	250–2,399
B	2,400–5,999
C	6,000–14,999
D	15,000 plus

Microsoft also offers a Component EA that customers can use to license one or two of the three components listed below. New customers who enroll in a Component EA receive a 15 percent discount off of the price they would have paid when licensing through a Select License Agreement.

- Windows 7 Professional Upgrade
- Microsoft Office Professional Plus 2010
- Microsoft Core CAL Suite
- Microsoft Enterprise CAL Suite

New customers who enroll in the full Professional or Enterprise Platform (the Windows 7 Enterprise Edition operating system upgrade, Office Professional Plus 2010, and Core CAL Suite or Enterprise CAL Suite) potentially receive an additional 15 percent platform discount on top of their already discounted enterprise software product for eligible organizations.

Microsoft Cloud Services

Keeping pace with the expanding array of Microsoft cloud services, the Enterprise Agreement also gives you the flexibility to choose among on-premises software and online services to best suit your user needs and help you optimize your technology spend.

Microsoft delivers a comprehensive set of cloud services and enterprise applications for user productivity, customer management, communication services, and custom business applications. Microsoft cloud services that are either available today or announced for availability in 2011 include Office 365, Windows Intune software and services, the Windows Azure technology platform, and Microsoft Dynamics CRM Online.

The EA typically has two cloud services: Enterprise Online Services or Additional Online Services. You can add these to your EA by doing the following:

- Adding online services to your EA through the standard Volume Licensing purchasing process.

- Transitioning users from enterprise products to equivalent Enterprise Online Services.

ENTERPRISE ONLINE SERVICES

The formal description of an Enterprise Online Service is a service that is designated as such in the Microsoft Product List. These services are comparable to existing on-premises enterprise products and enterprise platform products, and are counted as such when satisfying organization-wide licensing commitments and establishing volume pricing levels.

With the EA, you can move your on-premises licenses to eligible Microsoft Office or Windows Online Services during the life of the EA, and maintain or increase your EA commitment. Your company-wide commitment for enterprise products is satisfied by existing enterprise products and a selection of Microsoft Office 365 and Windows Intune online services with comparable capabilities.

To make it even easier, when you choose to transition users from enterprise products to equivalent Enterprise Online Services, you do not have to pay the additional costs of these services until your next agreement anniversary, and even then you only pay going forward. No retroactive payment is required.

You can also move users back to on-premises software at a future date if you have stayed current with your EA since your initial license purchase.

> **Tip...**
>
> With your Enterprise Agreement, you can license the full breadth of Microsoft Online Services as they become available.
>
> **Microsoft Office 365**
> Microsoft Office 365 offers cloud versions of Microsoft's most trusted communications and collaboration products with the latest version of the Microsoft Office suite.
>
> **Windows Azure**
> The Windows Azure Platform is a flexible cloud–computing platform for developing custom solutions with an on-demand scalable infrastructure.
>
> **Windows Intune**
> Windows Intune helps you manage and secure PCs anywhere with cloud services and provides the best Windows experience with upgrades to Windows 7 Enterprise.
>
> **Microsoft Dynamics CRM Online**
> Microsoft Dynamics CRM Online offers flexible sales, marketing, and service solutions that integrate with other Microsoft products, plus customization and partner offerings.

Additional Online Services

With your EA, you can license the full breadth of Microsoft Online Services when they become available. Those that are available as Additional Online Services through your EA are designated as such in the Microsoft Products List. You can add these Online Services to your existing EA, EAS, or CASA by contacting your Microsoft account manager or preferred reseller.

Note: True Ups and Annual Purchases are not used for Additional Online Services. You must purchase any licenses required to cover incremental users in advance of provisioning users. Exceptions exist where online services are included as part of other licenses, or where True Ups are expressly permitted for an online service in the Microsoft Product List or PUR.

How to Determine Pricing for Online Services

Microsoft provides the most comprehensive array of cloud services available, and the list of offerings is growing. You may see differing pricing models whether you want to build your own private cloud, develop and host web-based applications, or add productivity services for users. Some, like Microsoft Dynamics CRM Online and Windows Intune are delivered as per-user or per-device subscription, while others like the Windows Azure technology platform rely on a pay-as-you-go service model.

Please contact your Microsoft account representative or preferred reseller to learn more.

Comparing Volume Licensing Programs

	Microsoft Online Subscription Program	Open License	Open Value	Open Value Subscription	Select Plus	Enterprise Agreement	Enterprise Subscription Agreement
Number of desktop PCs	5 or more	5 or more	5 or more		Any; price levels start at 500 points per pool	250 or more	
Licensing offerings	Online Service and Software +Service Subscription Licensed Offers	License, License and Software Assurance, and Software Assurance for renewals or eligible OEM[1] and FPP[2] purchases	License and Software Assurance and Software Assurance renewals		License, License and Software Assurance, and Software Assurance for renewals or eligible OEM and FPP purchases	License and Software Assurance and Software Assurance renewals	License and Software Assurance
Pricing	Varies by service/offer.	Based on desktop PCs and/or License and Software Assurance orders			Automatic-tiered pricing based on product pools	Based on desktop PCs	
Agreement term	Agreement never expires.	Two years, not renewable	Three years, renewable		Agreement never expires	Three years, renewable	
Payment options	Varies by service/offer.	Up-front payment	Annual payments or up front		Annual payments or up front[4]		
How to buy	Microsoft Online Services Customer Portal	A broad reseller channel			Microsoft Authorized Large Account Resellers only	Direct relationship with Microsoft, supported by Authorized Enterprise Software Advisors	
Product fulfillment	Provisioning and activation on the online platform and/or via download from the Volume Licensing Service Center (VLSC)	Acquired separately	Provided with initial order via download from the VLSC[5]		Provided with initial order via download from the VLSC[5]	Provided with initial order via download from the VLSC; updates are provided throughout the agreement term	
Software Assurance	Not included	Option to add	Included		Option to add	Included	
Online Services[3]	Offered	Not offered	Offered	Offered	Offered		

[1]Original equipment manufacturer (OEM)
[2]Full-package product (FPP)
[3]Online Services refer to applications hosted at Microsoft Data Centers with client applications that may or may not be installed locally.
[4]License-only purchases (i.e., without Software Assurance) must be paid up front.
[5]Additional media must be obtained separately at a cost.

Taking the Next Step

1. Microsoft License Advisor (http://www.microsoft.com/licensing/mla/) can help you prepare your licensing plan. This online tool provides Volume Licensing program comparisons and guidance, simplifies Microsoft product selection through a series of questions, and produces a downloadable report and estimated retail price (ERP) or recommended retail price (RRP) quote. Microsoft License Advisor also enables you to securely share your quote with a Microsoft reseller.

2. Volume Licensing experts, including Microsoft representatives and partners or an authorized reseller near you, can provide guidance and insight about how to acquire or renew Microsoft Volume Licenses.

UNITED STATES AND CANADA

- Find a reseller online at the Microsoft PinPoint online business marketplace website at http://pinpoint.microsoft.com/.
- Call toll-free, (800) 426-9400 in the United States or (877) 568-2495 in Canada.

WORLDWIDE

- Find Volume Licensing contacts for your country or region at http://www.microsoft.com/licensing/worldwide.aspx.

CHAPTER 3: CHOOSING A VOLUME LICENSING PROGRAM FOR YOUR GOVERNMENT ORGANIZATION

These programs are for government organizations that want to acquire software licenses and achieve volume discounts.

Microsoft Volume Licensing offers customized programs that can meet the needs of your eligible government organization. Our flexible and affordable licensing solutions are tailored to your organization's size and purchasing preference so that you can find the best program for your organization and manage your licenses with ease.

With Volume Licensing pricing, you can control spending and better serve citizens with solutions built on Microsoft technology. The eligibility requirements depend on your locale.

In this chapter...
- Worldwide Government Licensing
- United States Government Licensing
- Home Use Program for Government Employees
- Choosing the Right Option
- Comparing Volume Licensing Programs for Government
- Taking the Next Step
- More Resources

Worldwide Government Licensing

Eligible government organizations receive special government pricing with one price level. Contact your Microsoft subsidiary or reseller for pricing information.

To learn about eligibility for government organizations worldwide, contact your local Microsoft subsidiary and review the eligibility definitions for your region. You also can review the eligibility requirements at the Volume Licensing website at http://www.microsoft.com/licensing/licensing-options/for-industries.aspx.

United States Government Licensing

In the United States, Volume Licensing programs are available for state, local, regional, and federal government agencies.

U.S. Federal Civilian Agencies

Microsoft offers preferred pricing to U.S. federal civilian agencies through various resellers and contracting vehicles, such as General Services Administration (GSA) Schedules and Microsoft Volume Licensing agreements.

It is likely that your agency has a Microsoft Volume Licensing agreement—such as a Microsoft Enterprise Agreement—in place with one of the Microsoft Authorized Government Resellers, so you can license software directly from the designated reseller. You can find a list of authorized resellers in the United States at http://www.microsoft.com/industry/government/howtobuy/federal/default.aspx.

To learn more about programs for U.S. federal government departments and agencies, visit
http://www.microsoft.com/industry/government/howtobuy/

State, Local, and Regional Organizations

Most states in the United States have at least one active Microsoft Volume Licensing agreement. If you license Microsoft software for a state or local government agency, you are probably eligible to use an existing agreement to acquire the licenses you need at the best possible prices.

With the variety of agreement types offered by Microsoft Volume Licensing, you can tailor your choice to your organization's size and purchasing preference. The following are your options for eligible government organizations.

- **Microsoft Enterprise Agreement for Government.** If your state has a Microsoft Enterprise Agreement, your agency can save up to 25 percent compared to other licensing programs. You only need 250 desktop PCs to qualify. Enterprise Subscription Agreement offers the same benefits with subscription-based licensing.

- **Microsoft Select Plus for Government.** Consider a state-level Select Plus Agreement to complement an existing EA for department-level license acquisition. With Select Plus, you can choose from a wide range of Microsoft software products for your agency at volume discounts.

- **Microsoft Open License for Government**. The Open License for Government program provides simple and flexible pricing during a two-year period. It is the best option for government organizations that want easy, one-time transactions for small quantities of software licenses.

- **Microsoft Open Value for Government.** Open Value for Government is for small and midsize organizations that want simplified license management, predictable software costs, better control over their software expenditure, and spread payments.

- **Microsoft Open Value Subscription for Government**. To align more closely with government organization procurement requirements, a one-year Open Value Subscription option is available, giving government organizations the flexibility to choose from a one-year or three-year term.

To learn about programs for state, local, and regional government agencies, visit
http://www.microsoft.com/industry/government/howtobuy/state/state.aspx.

Home Use Program for Government Employees

Many government employees are entitled to use Microsoft Office System software on their home computer as part of the Microsoft Home Use Program (HUP). The HUP is a benefit of Microsoft Software Assurance that offers employees the latest version of Microsoft Office for their home computer via a low-cost download. Home use helps support flexible work environments and helps improve employee satisfaction and productivity by accelerating familiarity with the newest Microsoft Office products.

Choosing the Right Option

A variety of programs can be tailored to the size and purchasing preference of your organization.

Small and Midsize Government Organizations

For small and midsize government organizations, Microsoft Volume Licensing has three options that offer flexibility and are sized right for your organization's needs and procurement procedures: Open Value for Government, Open Value Subscription for Government, and Open License for Government.

To better align with government organization procurement requirements, a one-year Open Value Subscription option is available with Open Value Subscription for Government. This option gives government organizations the flexibility to choose from a one-year or three-year term.

Program	Description
Open License for Government	Acquire licenses from your choice of qualified resellers through an easy, one-time transaction. Software Assurance is optional.
Open Value for Government*	Offers simplified license management, predictable software costs, and spread payments. Software Assurance is included.
Open Value Subscription for Government*	Get the same benefits as Open Value for Government with lower up-front costs. This program provides access to Microsoft software licenses for the term of the agreement through subscription-based licensing. A one-year Open Value Subscription option is also available for eligible government customers.

*Not available in some countries/regions. Contact your reseller to check current availability.

Midsize and Large Government Organizations

For midsize and large government organizations, Microsoft Volume Licensing offers programs that provide a cost-effective way to simplify license management and help increase employee productivity.

Program	Description
Enterprise Agreement for Government	Standardize technology across your organization with the latest Microsoft products. Provides simplified license management with a single agreement, predictable software costs, and spread payments. Software Assurance is included.
Enterprise Subscription Agreement for Government	Get the same benefits as the Enterprise Agreement with lower up-front costs. Includes access to Microsoft software licenses only for the term of the agreement through subscription-based licensing. Software Assurance is included.
Select Plus for Government	Acquire Microsoft software licenses and services at any affiliate or department level, while realizing advantages as one organization. Select Plus offers the flexibility to acquire licenses as needed, a single agreement with no specific end date and a single Lead Affiliate customer ID to streamline account management. Software Assurance is optional.

Comparing Volume Licensing Programs for Government

	Open License for Government	Open Value for Government[4]	Open Value Subscription for Government[4]	Select Plus for Government[5]	Enterprise Agreement for Government	Enterprise Subscription Agreement for Government
Number of desktop PCs	Minimum[5]	Minimum[5]		Any; price levels start at 500 points per pool	250 or more	
Licensing offerings	License, License and Software Assurance, and Software Assurance for renewals or eligible OEM[1] and FPP[2] purchases	License and Software Assurance and Software Assurance renewals		License, License and Software Assurance, and Software Assurance for renewals or eligible OEM and FPP purchases	License and Software Assurance and Software Assurance renewals	
Pricing	Based on desktop PCs and License and Software Assurance orders			Automatic-tiered pricing based on product pools	Based on desktop PCs	
Agreement term	Two years, not renewable	Three years, renewable. One-year option for Open Value Subscription		Agreement never expires	Three years, renewable	
Payment options	Up-front payment	Annual payments or up front		Annual payments		
How to buy	A broad reseller channel			Microsoft Authorized Large Account Resellers only	Direct relationship with Microsoft, supported by Authorized Enterprise Software Advisors or indirectly through a LAR	
Product fulfillment	Acquired separately	Provided with initial order; additional media must be obtained separately at a cost		Provided with initial order; updates are provided throughout the agreement term		
Software Assurance	Option to add	Included		Option to add	Included	
Online Services[3]	Not offered	Offered				

[1]OEM
[2]FPP
[3]Online Services refer to applications hosted at Microsoft Data Centers with client bits that may or may not be installed locally. They are priced monthly and billed annually for the term of the agreement.
[4]Not available in some countries/regions. Contact your reseller to check current availability.
Note: Additional programs exist for government partners in certain countries where Standard Indirect forms are not used.

Taking the Next Step

1. Microsoft License Advisor (http://www.microsoft.com/licensing/mla/) can help you prepare your licensing plan. This online tool provides Volume Licensing program comparisons and guidance, simplifies Microsoft product selection through a series of questions, and produces a downloadable report and estimated retail price or recommended retail price quote. Microsoft License Advisor also enables you to securely share your quote with a Microsoft reseller.

2. Volume Licensing experts, including Microsoft representatives and partners or an authorized reseller, can provide guidance and insight about how to acquire or renew Microsoft Volume Licenses.

UNITED STATES AND CANADA

- Federal Agencies: http://www.microsoft.com/industry/government/howtobuy/federal/default.aspx
- Department of Defense (DoD): http://www.microsoft.com/industry/government/howtobuy/federal/DoD.aspx
- State and Local Government Customers: http://www.microsoft.com/industry/government/howtobuy/state/state.aspx

WORLDWIDE

Organizations outside of the United States should contact the local Microsoft office at http://www.microsoft.com/worldwide.

More Resources

Use these resources to learn more about Microsoft Volume Licensing for Government:

- Learn about Microsoft programs for government organizations. Visit the Microsoft in Government website at http://www.microsoft.com/industry/publicsector/government/default.mspx.
- Discover more about what Volume Licensing can do for your organization at http://www.microsoft.com/licensing/.
- Review a list of the products that are available under Microsoft Volume Licensing at http://www.microsoft.com/licensing/about-licensing/product-licensing.aspx.
- View the government eligibility requirements at http://www.microsoftvolumelicensing.com/userights/DocumentSearch.aspx?Mode=3&DocumentTypeId=6.

CHAPTER 4: CHOOSING A VOLUME LICENSING PROGRAM FOR YOUR CHARITABLE ORGANIZATION

These programs are for eligible charitable organizations that want to acquire five or more licenses.

Transactional Licensing

With transactional Volume Licensing programs, customers acquire perpetual software licenses (meaning the institution owns the licenses) while eliminating the costs and packaging of retail software.

Microsoft has one transactional Volume Licensing program for charity customers: Microsoft Open License for Charities.[4]

Open License for Charities

With the Microsoft Open License for Charities program, eligible nonprofit organizations can acquire multiple software licenses—rather than multiple software packages—at reduced prices. Your organization needs to purchase only one complete software package license and enough licenses to cover the remaining number of computers.

Open License for Charities simplifies purchasing licenses, making it easier for you to get what you want when you need it. The program also gives you the flexibility to adjust your technology solutions to meet your organization's future needs.

In geographies where a software donations program is also available, the Open License for Charities program can be a supplementary program to the Donations Program. Charitable organizations eligible for free software through the donations program can purchase software licenses at discounted prices through the Open License for Charities program.

This easy, user friendly licensing program includes benefits such as the following:
- **Simplicity.** The program is easy to understand and administer, with simple, clear terms for acquiring software licenses.

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[4]Open License for Charities is not available in all countries. Contact your local Microsoft office regarding availability.

- **Flexibility.** The program is flexible enough to meet the needs of a broad range of organizations. You can choose from a wide selection of licensed products. After an initial order of five or more licenses, you can reorder as few as one license, so you order only what you need.
- **Availability.** You can acquire Microsoft products through Open License for Charities, where available, from any approved Volume Licensing reseller.
- **Compliance.** With the VLSC, you receive license confirmation information electronically and can quickly and easily view your license purchase history—so you never have a question about which licenses you own.

How to Acquire Charity Discounts

Eligible charity organizations receive special pricing for Open License for Charities. To buy product licenses at the reduced volume license prices, and to see if Open License for Charities is available in your region, contact your Microsoft subsidiary or software reseller.

To acquire product licenses through Open License for Charities, your organization must qualify as a charitable organization. Your reseller can help you determine if Open License for Charities is available in your region and if you qualify. Eligibility definitions are available at the Volume Licensing website at http://www.microsoftvolumelicensing.com/userights/DocumentSearch.aspx?Mode=3&DocumentTypeId=19.

More Resources

Use these resources to learn more about Microsoft Volume Licensing for Charities:

- Download the list of Open License for Charities resellers in the United States. The document is available under Downloads at the Open License for Charities webpage at http://www.microsoft.com/licensing/licensing-options/charity-resellers.aspx.
- Discover more about what Volume Licensing can do for your organization at http://www.microsoft.com/licensing/.
- Learn how to request a software donation for your charitable organization; see the NGO Connection section at http://www.microsoft.com/about/corporatecitizenship/en-us/community-tools/non-profits/get-stuff/eligibility-checklist/.

CHAPTER 5: CHOOSING A VOLUME LICENSING PROGRAM FOR YOUR SCHOOL OR UNIVERSITY

These programs are for educational institutions such as schools, colleges, and universities that want to acquire five or more licenses.

For educational institutions purchasing software licenses in quantity and managing software across multiple computers, Volume Licensing programs are an effective way to reduce the total cost of software ownership.

Microsoft offers both "transactional" and "subscription" Volume Licensing programs for education customers.

In this chapter...
- Transactional Licensing
- Subscription Licensing
- How to Acquire Academic Discounts
- Taking the Next Step

Transactional Licensing

With transactional Volume Licensing programs, customers acquire perpetual software licenses (meaning the institution owns the licenses) while eliminating the costs and packaging of retail software.

Microsoft has two transactional Volume Licensing programs for education customers: Microsoft Open License for Academic and Microsoft Select License for Academic.

Open License for Academic

Open License for Academic is a widely accessible and cost-effective way for education institutions of all sizes to easily license Microsoft software, starting with as few as five licenses.

You simply determine the number of software licenses your institution wants to acquire and place the order with an Authorized Education Reseller (AER). After obtaining your licenses, you can order media from a Microsoft approved fulfillment source, eliminating bulky boxes and the associated expense. License confirmations are distributed electronically and posted on a secure site on the Internet.

This easy, user friendly licensing program includes benefits such as the following:

- **Flexibility.** Get exactly what your institution needs—as many or as few licenses as you want. This program also gives you a wide choice of some of the best Microsoft software products. And you can begin with an order of only five licenses; then you can order as few as one license at a time at your convenience.
- **Availability.** With Open License for Academic, getting your preferred Microsoft software is as easy as finding an AER.

- **Compliance.** Quickly and easily view your license purchase history by using the VLSC. Open License for Academic provides you with simple tools, so you always know exactly what licenses you currently own.

Select License for Academic also offers the Student Select program, which gives you the option of purchasing licenses and media for limited products and transferring them to your students. These orders are placed using a special Student Select Enrollment under the Academic Select License Agreement.

Select Plus for Academic

Select Plus for Academic is for midsize and large education customers or aggregate groups (such as educational consortia) that want to purchase their software licenses and services at the affiliate level—such as site or department—yet have the same advantages that come from purchasing as a single institution.

Helping your institution get the most value from your software investment, Select Plus for Academic benefits include the following:

- **Accessible, flexible purchasing.** Select Plus for Academic uses a single, institution-wide agreement that supports both centralized and decentralized purchasing of licensed products on an as-needed basis. Like the Campus and School Agreement, the Select Plus for Academic Agreement has no specific end date and simplifies budgeting for short- and long-term IT needs.

- **Better manageability.** With Select Plus for Academic, you have fewer agreements to track and manage. Because all affiliate purchases are tied to their own unique customer IDs, you have a clear view of your entire license and software asset portfolio—either in a comprehensive report containing all affiliates or an individual report with the ability to drill down into a specific affiliate.

- **Better returns with Software Assurance.** Select Plus for Academic helps you maximize your return on investment (ROI) by giving you the choice of adding a full 36 months of Software Assurance to the licenses you purchased—without proration or regard to purchase timing.

Subscription Licensing

Microsoft has two subscription licensing offerings for education customers, the Enrollment for Education Solutions and the School Enrollment. Both offer a subset of products, including specific application, system, and Client Access License products, designated by Microsoft as "desktop platform products," which are licensed on an organization-wide basis.

To get started with your subscription, you place an order for desktop platform products in a quantity that is equal to your organization-wide count of full-time equivalent (FTE) employees or students (for Enrollment for Education Solutions) or PCs (for School Enrollment). For products licensed organization wide, even if the number of devices or users grows, you remain fully licensed throughout the designated

term, and you only need to report an increase in the number of your FTE employees or students or PCs on your annual order.

All products licensed through either subscription offering include Software Assurance, a comprehensive maintenance offering that helps you maximize your software investment.

- The **Enrollment for Education Solutions (EES)** is available to both primary/secondary and higher education institutions and offers the simplicity of counting people and the flexibility to order additional products in any quantity as needed.

- The **School Enrollment** is for primary/secondary schools and preschools and offers the simplicity of licensing all products organization-wide with an annual count of your institution's PCs.

Subscription licensing offers many benefits, including the following:

- **Easy compliance.** Because all of your computers and users are covered throughout the subscription term based on an annual count of your FTE employees or students (EES) or PCs (School Enrollment), it is easy to ensure that your institution is fully licensed for the products you selected organization-wide.

- **Low administration.** Subscription licensing eliminates the need to track licenses for the selected products on every computer, which can be especially helpful for managing software assets in a decentralized environment.

- **Simple budgeting and purchasing.** One annual payment covers all of the products you have selected for the year.

- **Current technology.** With subscription licensing, your licensed users can run the most current version of the software products included in the subscription.

- **Value.** By standardizing on a platform of products, you reduce your total cost of software ownership while helping to increase productivity and access to current technology. In addition, Software Assurance is included with your licenses. This provides additional support resources, tools, and E-Learning courses.

- **Student Licensing.** It is easy to provide your students with the software they need. Through the Student Option, you can license your students for use of one or more of the available EES or School Enrollment application, system, or CAL products on a personally-owned computer or an institution-owned computer designated for a student's exclusive use (a portable computer checked out to a student for the school year, for example).

How to Acquire Academic Discounts

Microsoft Authorized Education Resellers are specially trained and authorized to sell academic edition software products and licenses to qualified educational users. To find an AER in the United States or Canada, visit the AER Finder tool at the Microsoft Education website at

http://www.microsoft.com/education/en-us/buy/licensing/Pages/resellers.aspx. For educational institutions outside of North America, contact your local Microsoft office or visit your regional Microsoft Licensing website. Visit the Microsoft Worldwide website at http://www.microsoft.com/worldwide/ to locate your regional website.

Work at Home

Educational institutions that have acquired licenses through Microsoft Academic Volume Licensing programs can grant to their faculty and staff the right to use a second copy of a limited selection of products on either a home or portable computer.

Open License for Academic and Select Plus for Academic Work at Home Licenses

For each copy of Microsoft Office you license, the primary user of the computer on or from which the product is run can also run a second copy from either a laptop or desktop computer that he or she owns or leases. The user can only use the software while the agreement is active.

Enrollment for Education Solutions and School Enrollment Work at Home Licenses

Work at Home (WAH) licenses for EES and School Enrollment customers are available for all application, system, and CAL products at no extra cost. These limited rights permit using licensed products on a personally owned computer for work-related purposes only. You can extend these rights to your faculty and staff members only for licensed products for which you have institutional licenses through your enrollment.

MSDN Academic Alliance Membership

With an EES or School Enrollment, your institution is eligible to receive an organization-wide, free online subscription of DreamSpark technology for instructional use by your teachers and students in your classrooms and labs. DreamSpark enables you to outfit your labs with the latest Microsoft developer, design, and server tools to support personal or in-class learning for your students and educators. With a DreamSpark membership, students get the professional-level developer and designer tools they would

> ### Rhode Island Society of Technology Educators…
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> To train students to achieve technology proficiency, Rhode Island Public Schools must acquire the latest software. In response, smaller school districts in the state formed the Rhode Island Society of Technology Educators (RISTE) and, with the help of TechTeam Government Solutions, set up a School Agreement with Microsoft to qualify for volume prices on software licenses. Through that agreement, RISTE members get a volume price on software licenses and the flexibility of annual payments. They achieve additional value with Microsoft Core CALs and Enterprise CAL Suites, which offer access to multiple products through a single license. As a result, RISTE members have simplified license management, reduced licensing costs, gained faster access to new technologies, improved collaboration and accessibility, and gained more value for their software dollar.
>
> For more information:
>
> http://www.microsoft.com/casestudies/Case_Study_Detail.aspx?CaseStudyID=4000001668

use to build real sites, apps, and games for the Xbox LIVE online game system and Xbox 360 video game and entertainment system, Kinect sensor, Microsoft Windows Phone, and more. DreamSpark enables students to get a head start on a career or do better in class.

This complimentary memberships are not provided through the Open License for Academic or Select License for Academic programs. To enroll in an MSDN Academic Alliance program, please visit the Microsoft DreamSpark website at http://www.dreamspark.com/.

Student Licensing

All the Microsoft academic licensing programs (except Open License for Academic) offer a way to pass savings on to students.

Select Plus for Academic offers Student Select Plus through which customers can purchase licenses and media for a limited selection of products and transfer them to students. These orders are placed using an an affiliate enrollment under the Select Plus for Academic Agreement.

The EES and School Enrollment programs offer a Student Option. With this option, students are licensed to use selected products on a personally-owned computer or an institution-owned computer designated for the student's exclusive use.

The following is an overview of the Volume Licensing programs available to educational institutions.

	Enrollment for Education Solutions (EES)	School Enrollment	Open License for Academic	Select Plus for Academic
Customer profile	All qualifying academic customers looking for a simple, cost-effective subscription licensing agreement.	K–12 schools and districts and preschools looking for a simple, flexible subscription licensing agreement.	Academic institutions of any size that want easy, one-time transactions and the flexibility of acquiring licenses in small quantities.	Midsize to large organizations that want the pricing advantage of multiple affiliates and a non-expiring agreement.
Available products	View the current Microsoft Volume Licensing Product List at http://www.microsoft.com/licensing/userights/			
Agreement term	One or three years	One or three years	Two years from the time of initial order	No agreement expiration
Software Assurance benefits	Software Assurance is included, which provides product updates and upgrades, Home Use Program, support resources and tools, E-Learning courses, and more.	Software Assurance is included, which provides product updates and upgrades, Home Use Program, support resources and tools, E-Learning courses, and more.	Include Software Assurance with license purchases and receive product upgrades released during the agreement term and E-Learning courses.	Option to add 26 months of Software Assurance with no proration. Include Software Assurance with individual license purchases and receive product upgrades released during the agreement term and E-Learning courses. Include Software Assurance Membership on a product pool and receive additional benefits.
Student licensing	Student Option licenses all students to use products on their personal computers.	Student Option licenses a specific number of students to use products on their personal computers.	Not currently available.	Student licenses available through Student Select Plus.
How to buy	Through an Authorized Education Reseller or Large Account Reseller*	Through an Authorized Education Reseller	Through an Authorized Education Reseller	Through a Large Account Reseller

*You can obtain subscription licenses through the Enrollment for Education Solutions in the following one of two ways, depending on the size of your organization:

1. Customers with as few as five FTE employees or students (if choosing the Student Option) can license through an AER by signing the simplified Open Value Subscription Agreement for Education Solutions (OVS-ES), online eAgreement.

2. Larger customers with a minimum of 1,000 FTE employees (or students if choosing the Student Option) can also license through a LAR by signing the Campus and School Agreement and the Enrollment for Education Solutions.

Taking the Next Step

1. Visit http://www.microsoft.com/education/en-us/buy/Pages/licensingOption.aspx to learn more about your options.

2. Microsoft License Advisor (http://www.microsoft.com/licensing/mla/) can help you prepare your licensing plan. This online tool provides Volume Licensing program comparisons and guidance, simplifies Microsoft product selection through a series of questions, and produces a downloadable report and estimated retail price or recommended retail price quote. Microsoft License Advisor also enables you to securely share your quote with a Microsoft reseller.

3. Volume Licensing experts, including Microsoft representatives and partners or an authorized reseller near you, can provide guidance and insight about how to acquire or renew Microsoft Volume Licenses.

UNITED STATES AND CANADA

- Find an AER or LAR online at http://www.microsoft.com/education/en-us/buy/licensing/Pages/resellers.aspx.

- Call toll-free at (800) 426-9400 in the United States or (877) 568-2495 in Canada.

WORLDWIDE

- For educational institutions outside of North America, contact your local Microsoft office, http://www.microsoft.com/worldwide, or visit your regional Microsoft Licensing website at http://www.microsoft.com/licensing/worldwide.aspx.

CHAPTER 6: MICROSOFT VOLUME LICENSING PROGRAMS FOR SOFTWARE AND SERVICE PARTNERS

Microsoft offers special licensing programs for independent software vendors (ISVs) and service providers that want to integrate Microsoft software into their own solutions and/or services.

The Independent Software Vendor Royalty Licensing Program is for ISVs interested in integrating Microsoft software products into their solutions. Similarly, the Services Provider License Agreement (SPLA) Program, which includes both SPLA and SPLA Essentials options, is for service providers who want to license Microsoft products so that they can provide software services to their customers. Both the ISV and SPLA programs offer enrollees benefits, including opportunities for cost reduction and the means for extending sales options.

In this chapter...

- ISV Royalty Licensing Program
- Services Provider License Agreement
- Resources

Partner Type	Description
ISV	ISVs are organizations that exclusively develop software or software solutions instead of being part of a computer system or being a hardware manufacturer; and at least 30 percent of the company's overall revenue comes from the sales of licenses of that solution.
Service Provider	Service Providers offer a variety of services to their customers, including direct or indirect access to Microsoft licensed products, such as hosted websites or LOB applications; software services that interact with Microsoft products where the partner, not the customer, is the licensee; facilitating a customer's business, including business transactions with third parties, through software services that interact with Microsoft products; and access to and use of any application, Microsoft or otherwise, with the application running on a server and interacting with a Microsoft product.

ISV Royalty Licensing Program

The Microsoft ISV Royalty Licensing Program is a worldwide software licensing program for all solutions partner segments. The program gives ISVs a convenient way to license Microsoft products and integrate them into a unified software business application, which can then be replicated and distributed fully licensed.

The ISV Royalty Licensing Program provides access to a wide range of Microsoft products. Get the most recent ISV Royalty Product List (updated quarterly) from your authorized ISV Royalty Licensing Program distributor to see the wide selection of Microsoft products available for the ISV Royalty Licensing Program (does not include desktop PC operating systems, server operating systems, and online services).

Program Enrollment Requirements

To enroll in the ISV Royalty Licensing Program, your organization must meet eligibility requirements by doing the following:

- **Develop a Unified Solution.** Your value-added Unified Solution uses Microsoft products and adds significant and primary functionality and is distributed through a tangible medium.

- **Designate a licensed products distributor.** Work with an authorized ISV Royalty Licensing Program distributor to complete the ISV Royalty License and Distribution Agreement.

- **Provide technical support.** You are responsible for providing technical product support to your users for the Microsoft products included in the Unified Solution.

- **Comply with the Microsoft license terms.** Incorporate any applicable Microsoft license terms into the user agreement for the Unified Solution.

- **Sign agreements.** Complete the ISV Royalty License and Distribution Agreement, MBSA, and signature form. To obtain these documents, contact a distributor (listed at https://partner.microsoft.com/global/40128511).

Learn more about the ISV Royalty Licensing Program at the Microsoft Volume Licensing website at http://www.microsoft.com/licensing/licensing-options/isv-program.aspx.

Software Vendor Saves Up to 50 Percent on Costs with the ISV Royalty Licensing Program

Epicor Software Corporation is a Microsoft Gold Certified Partner that has built a global business supplying companies in more than 140 countries with a wide range of solutions for tasks such as supply chain management (SCM), professional services automation, enterprise resource planning (ERP), retail management, and IT services. To help enhance its offerings, Epicor participates in the Microsoft ISV Royalty Licensing Program, which allows ISVs to embed Microsoft products into unified solutions. An example is Epicor Portal, which incorporates Microsoft software that is fully supported by Epicor. Through participation in the program, Epicor can provide its customers with compelling solutions that allow Epicor to attract greater numbers of new customers and support existing customers.

To read the full story, visit

Services Provider License Agreement

With the Services Provider License Agreement, a service provider organization can license Microsoft products on a monthly subscription basis for a three-year agreement term. The organization can then use these products to provide software services and hosted applications to its customers. The SPLA may be right for you if you have one of the following business scenarios:

- Your organization provides your customers with direct or indirect access to Microsoft licensed products such as hosted websites or LOB applications through Microsoft server products.
- Your organization offers your customers software services that interact with Microsoft licensed products. In this scenario, you, not the customer, are the licensee.
- Your organization facilitates your customer's business, including business transactions with third parties, through software services that interact with Microsoft products.
- Your organization provides your customers with access to, and use of, any application, Microsoft or otherwise, and the application is running on a server and interacts with a Microsoft product on that server.

Software Services

For service providers, software services are online services that you provide to your customers to make licensed products available to them. These software services display, run, access, or otherwise interact with Microsoft licensed products. You provide software services from one or more data centers through the Internet, a telephony network, or a private network on a rental, subscription, or services basis, whether or not the service provider receives a fee. The SPLA makes offering software services easier because you are the licensee, not the customer.

> **Tip...**
>
> The Services Provider License Agreement is the only program that gives you the right to license Microsoft products for commercial hosting.

Program Benefits

The SPLA offers the following benefits:

- **Deliver a customized service.** Flexibility to deliver tailored IT services to your customers through a dedicated or shared hosting environment. Increase the value of your services by managing software use rights for your customers.

- **Pay as you go with no up-front costs.** Pay only for the products that you made available to your customers the previous month. No start-up costs, monthly sales requirements, or long-term commitments exist.

- **Access the most current product versions.** Give your customers the most current and capable Microsoft platform. Download your products at no charge through the VLSC instead of ordering physical media.

- **Try before you buy.** Test and evaluate products internally before offering them to your customers as a service.

- **Receive prior version rights.** Rights to prior product versions to support a seamless transition for developers and ISVs to move to the SPLA and have a hosted business model.

- **Outsource data center services.** Install Microsoft products on servers under the day-to-day management and control of an outsourcing company. That company can then perform data center administration, testing, and maintenance support services on your behalf.

- **Install at customer facilities.** Install Microsoft products on devices you own or lease and that are located on your customer's premises.

- **Offer demonstrations and evaluations.** You can have up to 50 active user IDs for service/product demos and give your customers a free 60-day trial period.

- **Receive additional price savings.** With the Extended Term License, you can license select products for three years at a savings over standard pricing—with no minimum purchase.

- **Include your affiliates.** Include affiliates under a single agreement.

- **Expand your reach to academic institutions.** Expand your business with specific price offerings available to your academic customers through the SPLA.

Program Requirements

The following are the primary requirements to participate in the SPLA. See the SPLA Program Guide at the Microsoft Volume Licensing website at http://www.microsoft.com/licensing/licensing-options/spla-program.aspx#tab=3 for complete program requirements.

- **Enroll in the Microsoft Partner Network (MPN).**
  You must be a member of the Microsoft Partner Network. If you are not a member, learn how to enroll at the Volume Licensing website at
  https://partner.microsoft.com/global/licensing/licensingprograms/ltvolumelicensing/40032508.
  You must also join the Microsoft Hosting Community (visit the same Volume Licensing website).
  For information on how to join the Microsoft Partner Network, view
  https://partner.microsoft.com/global/40014052.

- **Designate a licensed products reseller.**
  Work with a SPLA reseller to complete the SPLA (and MBSA if applicable).

- **Provide monthly reporting on software licenses.**
  Submit either a monthly use report or zero use report to your SPLA reseller (or to Microsoft for direct agreements) on all licenses that you made available to your customers. You also must include the customer name and address if the customer generated more than U.S. $1,000 per month in revenue to Microsoft.

- **Submit monthly invoice payment.** You will be invoiced monthly by either your reseller or Microsoft, depending on your agreement type, based on the number of licenses reported in your monthly use report. You are responsible for submitting your payment by the agreed date.
- **Comply with the Services Provider Use Rights (SPUR).**
  The SPUR describes the PUR for products licensed under the SPLA. The SPUR specifies use rights and conditions that apply to a customer's use of the licensed products. Microsoft may revise the SPUR at any time. The SPUR is updated quarterly and is located at the Volume Licensing website at
  http://www.microsoftvolumelicensing.com/userights/DocumentSearch.aspx?Mode=3&DocumentTypeId=2.

Additional SPLA Requirements:

- **Sign an MBSA.**
  - Service providers that have an existing MBSA via another Volume Licensing agreement (Enterprise Agreement, Enterprise Subscription Agreement, Select Plus, Select License, or ISV Royalty) should work with their account manager and/or reseller to provide their MBSA number and link the MBSA to their SPLA.
  - Service providers without an existing MBSA are required to sign on the next time they sign a SPLA.
- **Submit monthly invoice payment.**
  - **Extended Term License:** The Extended Term License stock-keeping units (SKUs) are billed in three annual installments, and no additional reporting is required for the duration of the agreement. The first installment is due at agreement signing, with the balance billed on the first and second agreement anniversaries.

Resources

- Find a SPLA reseller at:
  http://www.microsoft.com/serviceproviders/licensing/howto.mspx#SPLAReseller

CHAPTER 7: USING PRODUCTS LICENSED THROUGH A MICROSOFT VOLUME LICENSING PROGRAM

Software products licensed through a Microsoft Volume Licensing program are subject to Product Use Rights (PUR), which govern the use of the software.

Microsoft does not sell its products to customers. Instead, customers purchase the right to use the product in a specific manner. This is called a product license. All product licenses come with agreements that define and govern how you can use the software.

When a product license is purchased through a Microsoft Volume Licensing program, its use is governed by the PUR document, together with the Microsoft Volume Licensing program agreement.

In this chapter...

- Product Licensing Models
- Resources and Tools
- Managing Your Licenses
- Microsoft Volume Licensing Service Center
- Product Activation—Volume Activation
- Cloud Services

The PUR document contains the product-specific terms and conditions that govern how Microsoft products can be used in the Volume Licensing programs. It is the equivalent of the Software License Terms (formerly known as the End User License Agreement or EULA), that you receive when acquiring a retail product. Much of the wording is common to both the Software License Terms and the PUR. This document is updated quarterly. The PUR that is in effect as of the beginning of the licensed period for a particular product version applies to the use of that product version throughout the licensed period. The use rights for a particular product version lock when a customer first orders a product. If a new version is released, use of the new version is governed by the most current PUR as of the time of that release.

Product Licensing Models

Different products use different licensing models. A desktop PC program, such as Microsoft Office, is licensed differently than a server product, such as Windows Server. Each of Microsoft's nine licensing model categories is listed below with a brief description of the associated licensing model.

DESKTOP PC APPLICATIONS—PER-DEVICE LICENSE

You must acquire a license for each device using the software (locally or remotely via a network). You can install any number of copies and any prior version on the device or on a network device to support that use. You can also install those copies on the host operating system or in a virtual hardware system.

Figure 1

You can install more than one copy on the licensed device. You can access copies of the software installed on a network device only from a device that has a license for the software.

Figure 2

The device you use to remotely access software must be licensed for the same or higher edition, but not a lesser edition.
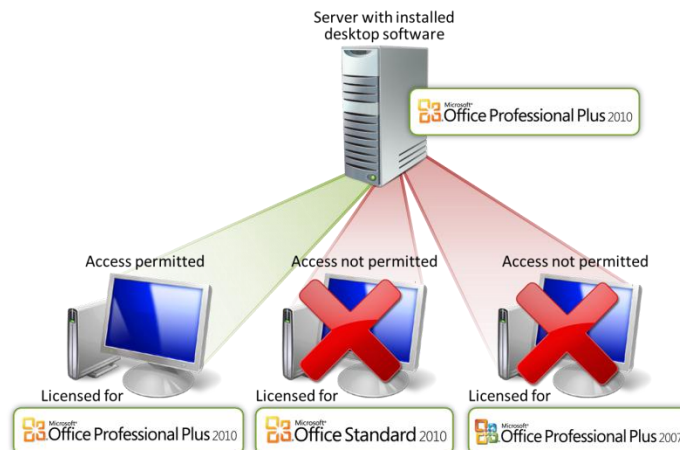
DESKTOP PC OPERATING SYSTEMS—PER-COPY, PER-DEVICE LICENSE

You must acquire a license for each device on or from which you access or use the software (locally and remotely). You can install only one copy on the device. You can install that copy on the host operating system or in a virtual (or otherwise emulated) hardware system. In Volume Licensing, the desktop PC operating system license is an "upgrade license." You can only acquire upgrade licenses for devices for which you have already licensed a "qualifying operating system." A list of "qualifying operating systems" that qualify for an upgrade license is contained in the Product List, which you can find at http://www.microsoft.com/licensing/about-licensing/product-licensing-overview.aspx.

If you acquire Software Assurance, you have the right to use Windows 7 Enterprise Edition on the device instead of Windows 7 Professional. This also permits you to run up to four additional copies or instances on the device.

Figure 3
A device with active Software Assurance may have Windows 7 Enterprise running in the physical operating system environment and a mix of Windows editions and versions running in four virtual operating system environments all on the same physical device.
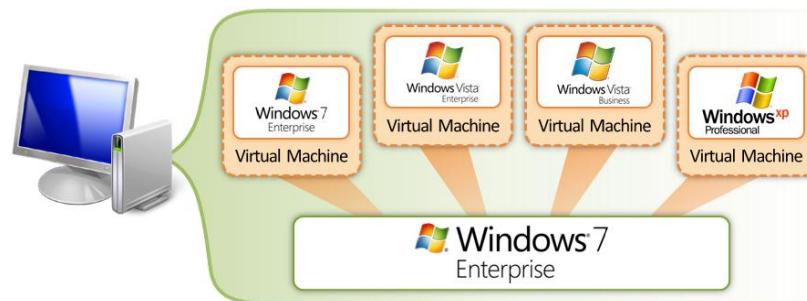
DEVELOPER TOOLS—PER-USER LICENSE

You must acquire a license for each user you permit to access or use the software. You can install any number of copies on any number of devices for access and use by one user to design, develop, test, and demonstrate programs. Only licensed users can access the software.

ONLINE SERVICES—USER OR DEVICE SUBSCRIPTION LICENSE, SERVICES SUBSCRIPTION LICENSE, OR ADD-ON SUBSCRIPTION LICENSE

For organizations with more than five users, Microsoft offers a new way to quickly subscribe to and use Microsoft Online Services (OLS). Microsoft delivers its software as a service for both consumers (with the Windows Live network of Internet services) and for businesses (with Online Services). Organizations with

as few as five users can subscribe and use Microsoft OLS. Because Online Services are subscription-based, customers pay per user per month or per user per year. With the new Microsoft Online Subscription Program (MOSP), customers can quickly subscribe online, rapidly deploy services, and manage their licenses using an online management tool.

Licensing under the Online Services model includes one or more of the following:

- **User Subscription License or Device Subscription License (USL or DSL).** For offerings that require these, USLs and DSLs are needed for each user or device that accesses the online service.

- **Services Subscription License (SSL).** For offerings that require these, this license applies to the entire organization's use of the online service. User, Device, or Add-on SLs may also be required, depending on the service offering.

- **Add-On Subscription License (Add-on SL).** This license sometimes is used instead of or in addition to USLs, DSLs, and SSLs. Its purpose varies. For example, it can apply to a specified number of consumed units, such as gigabytes of storage, or it can apply to a single server accessed by external users. Add-on subscription licenses are not always required.

If you have Enterprise Agreements or Campus and School Agreements, Microsoft recommends that you purchase Online Services through your existing Volume Licensing agreement to obtain optimized price advantages for volume purchases.

If you purchase through Microsoft Open License, Open Value, Select License, and Select Plus, Microsoft recommends that you evaluate and determine how subscribing to Microsoft Online Services can support your IT strategy. For more information, visit the Microsoft Online Services site at www.microsoft.com/online. Transactions can be made via the Microsoft Online Services Customer Portal (MOCP) at https://mocp.microsoftonline.com/.

SERVERS—OPERATING SYSTEMS—SERVER LICENSE PLUS CAL PLUS OPTIONAL EXTERNAL CONNECTOR

With most products, you must acquire a license for each running instance of the server software you run on a server. You can run that instance in a physical or virtual operating system environment (OSE). By exception to the licensing model, some products provide broader use rights. For example, a Windows Server 2008 R2 Enterprise license permits a running instance in up to four virtual OSEs at a time on the licensed server. With some products, such as Windows Server 2008 R2 Datacenter, you can run any number of instances at the same time as long as you license each physical processor on the licensed server.

Figure 4
The number of permitted instances for each operating system license.

Operating System	Permitted instances in physical and virtual OSEs on a single server
Windows Server 2008 R2 Standard	1* + 1
Windows Server 2008 R2 Enterprise	1* + 4
Windows Server 2008 R2 Datacenter	1+ Unlimited
Windows Small Business Server 2008 Standard	1* or 1
Windows Server 2003 for Small Business	1* or 1

If running the maximum allowed instances, the instance in the physical OSE can only be used to run hardware virtualization software, provide hardware virtualization services, or run software to manage and service OSEs on the licensed server.

Except as outlined in the PUR, all server operating system products require a CAL for each user or device that accesses the server software. Device CALs and User CALs are two types of CALs:

- **Device CAL.** Licenses a device for use by any user to access instances of the server software.
- **User CAL.** Licenses one user to use any device to access instances of the server software.

CALs are version-specific. They must be the same version or later than the server software being accessed. CALs permit access to servers licensed by the same entity. They do not permit access to another entity's licensed servers.

Figure 5
*CAL assignment based on user or device.*
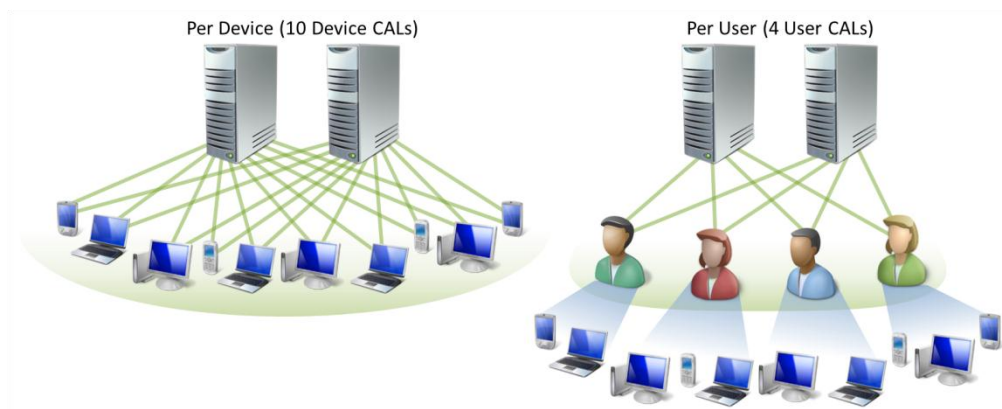
You can deploy network architectures that use hardware or software to reduce the number of devices or users that **directly** access the software on a server. This is referred to as multiplexing or pooling. This does

not reduce the number of CALs required to access or use the server software. A CAL is required for each device or user that is connected to the multiplexing or pooling software or hardware front end.

Figure 6
Multiplexing: Users and devices can indirectly access the Windows or SharePoint Server software as shown in the diagram below. Indirectly accessing the server software does not negate the requirement for a CAL. In the example below, each user and/or device on the right is required to have a Windows Server CAL and a SharePoint Server CAL.
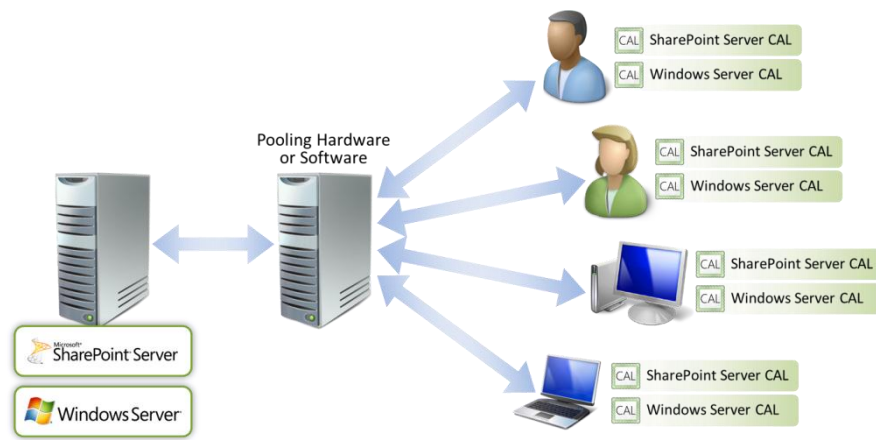
An External Connector (EC) license is an alternative to CALs for each server that external users access. External users are users who are not employees or on-site contractors. An EC license assigned to a server permits access by any number of external users, as long as that access is for the benefit of the licensee and not the external user. Each physical server that external users access requires only one EC license regardless of the number of instances running. The right to run instances of the server software is licensed separately; the EC, like the CAL, simply permits access. EC licenses, like CALs, are version- and functionality-specific. They must be the same version or later than the server software being accessed. The decision whether to acquire CALs or an EC is primarily a financial one.

SERVERS—MANAGEMENT SERVERS—MANAGEMENT LICENSE (SERVER OR CLIENT)

Under the Management Servers licensing model, you must acquire and assign the appropriate Management License (ML) for the device or OSE that will be managed. Included with the ML are the rights to run the corresponding Management Server Software. Separate Management Server software licenses are NOT required.

Two categories of MLs are available: server and client. The category of ML required depends on the operating system software running within an OSE. OSEs running server operating system software require server MLs. OSEs running any other operating system software require client MLs.

Licenses Required for Managed Servers

One type of server ML is available: OSE. An OSE server ML permits you to use the Management Server Software to manage the number of OSEs corresponding to its edition. All of the server MLs you assign to a server must be of the same edition.

Note: Microsoft System Center 2012 Standard and Datacenter editions provide the same Management Server Software components.
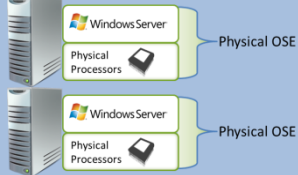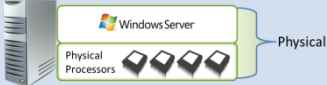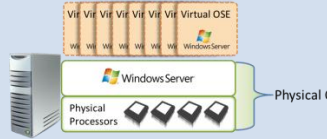
Standard Edition Server MLs: The number of OSE server MLs you need depends on the number of physical processors there are on the server on which the managed OSEs run and the number of OSEs you manage on that server. You must calculate the licenses you need based on each, as described below, and acquire and assign to your server the greater number of licenses.

- **Counting licenses based on processors:** Each license covers up to two physical processors, so you must count the number of physical processors on the server, divide that number by two, and round up to the nearest whole number.
- **Counting licenses based on managed OSEs:** Each license permits you to manage up to two OSEs, so you must count the number of OSEs you manage on the server, divide that number by two, and round up to the nearest whole number. An exception to this rule is when the physical OSE on your server is being used solely to run hardware virtualization software, provide hardware virtualization services, and run software to manage and service OSEs on that device. In that case, you only count the number of virtual OSEs you manage on the server, divide that number by two, and round up to the nearest whole number.

Datacenter Edition Server MLs: The number of OSE server MLs you need depends on the number of physical processors there are on the server on which your managed OSEs run. Each license covers up to two physical processors, so you must count the number of physical processors on the server, divide that number by two, round up to the nearest whole number, and acquire and assign that number of licenses to your server.

Provided you acquire and assign to your server the required number of Datacenter edition server MLs, as described above, you can manage any number of OSEs on that server.

Figure 7
Examples of server ML requirements.

Server Configuration		Standard Server MLs Required	Datacenter Server MLs Required	Rationale
2 one-processor servers, non-virtualized		2	2	• A one-processor server requires at least one Server ML. • A single Server ML cannot be used to license two one-processor servers.
1 four-processor server, non-virtualized		2	2	• Two licenses are required because each Server ML covers up to two physical processors.
1 two-processor server and three virtual OSEs		2	1	• Because one Standard Server ML supports two virtual OSEs, two licenses are needed to manage three virtual OSEs. • Because one Datacenter Server ML supports unlimited OSEs, only one license is needed to run three virtual OSEs.
1 four-processor server and eight virtual OSEs		4	2	• Because one Standard Server ML supports two virtual OSEs, four licenses are needed to manage eight virtual OSEs. • Because one Datacenter Server ML supports unlimited virtual OSEs, two licenses are needed to cover four processors.

Licenses Required for Non-Servers (Clients)

Two types of client MLs are available: one for managed OSEs and one for users. You can choose either type or a combination of both.

- **OSE Client MLs:** Each OSE client ML permits you to use the Management Server Software to manage one OSE. Any number of users can use that OSE. Provided you acquire and assign OSE client MLs to your device as described here, you can manage the OSEs on that device (one OSE per license).

  Figure 8
  One OSE client ML permits managing an OSE used by any number of users.

- **User Client MLs:** Each user client ML permits you to use the Management Server Software to manage one user's OSE. Users can use those OSEs on any number of devices. Provided you acquire and assign a user client ML to your user as described here, you can manage all of the OSEs used by that user. If

you have more than one user using an OSE, and you are not licensed by an OSE, you must assign a user client ML to each of the users.

Figure 9
One user client ML permits managing any number of OSEs used by the licensed user.

In some cases, a third type of client ML is available. The Enterprise CAL Suite and Core CAL Suite and their respective CAL Suite Bridges are device client MLs. A device client ML permits you to use the Management Server Software to manage the OSEs on a device. Any number of users can use these OSEs. Provided you acquire and assign a device client ML to your device as described here, you can manage all of the OSEs on that device. Please refer to the Product-Specific License Terms section in the PUR for which products permit management

## SERVERS—SERVER/CAL—SERVER LICENSE PLUS CAL PLUS OPTIONAL EXTERNAL CONNECTOR

With most products, you must acquire a license for each instance of the server software you run on a server. You can run that instance in a physical or virtual OSE. By exception to the licensing model, some products provide broader use rights. For example, a Windows Server 2008 Enterprise license permits a running instance in up to four virtual OSEs at a time on the licensed server. With some products, such as Windows Server 2008 Datacenter, you can run any number of instances simultaneously as long as you license each physical processor on the licensed server.

Except as outlined in the PUR, all server/CAL products require a CAL for each user or device that accesses any instance of the server software. Two types of CALs are Device CALs and User CALs.

- **Device CAL.** Licenses a device for use by any user to access instances of the server software on licensed servers.
- **User CAL.** Licenses one user to use any device to access instances of the server software on licensed servers.

CALs are version- and functionality-specific. They must be the same version or later than the server software being accessed.

You can deploy network architectures that use hardware or software to reduce the number of devices or users that **directly** access the software on a server. This is referred to as multiplexing or pooling. This does not reduce the number of CALs required to access or use the server software. A CAL is required for each device or user that is connected to the multiplexing or pooling software or hardware front end.

Figure 10
CAL assignment based on user or device.
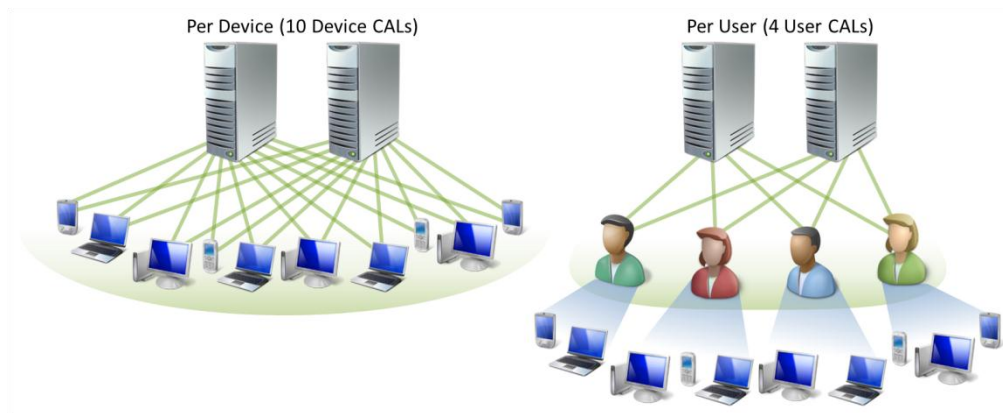
An EC license is an alternative to CALs for each server that external users can access. External users are users who are not employees or on-site contractors. An EC license assigned to a server permits access by any number of external users, as long as that access is for the benefit of the licensee and not the external user. Each physical server that external users access requires only one EC license regardless of the number of instances running. The right to run instances of the server software is licensed separately; the EC, like the CAL, simply permits access. EC licenses, like CALs, are version- and functionality-specific. They must be the same version or later than the server software being accessed. The decision whether to acquire CALs or an EC is primarily a financial one.

SERVERS—PER PROCESSOR—PROCESSOR LICENSE

You must acquire a license for each processor on a server that the software uses. For software running in physical OSEs, you must license each physical processor. For software running in virtual OSEs, you need to license only the virtual processors the software uses. You do not need CALs or EC licenses because per-processor licensing allows any number of users to access the software from any number of devices.

You can run any number of instances in licensed physical or virtual OSEs.

Figure 11

Per Processor—Physical Operating System Environment. For software running in physical operating system environments, you must license each physical processor. This scenario requires four Microsoft BizTalk Server Standard Processor licenses.

Figure 12

Per Processor—Virtual Operating System Environments. For software running in virtual operating system environments, you need to license only the virtual processors the software uses. This scenario requires two BizTalk Server Standard Processor licenses.
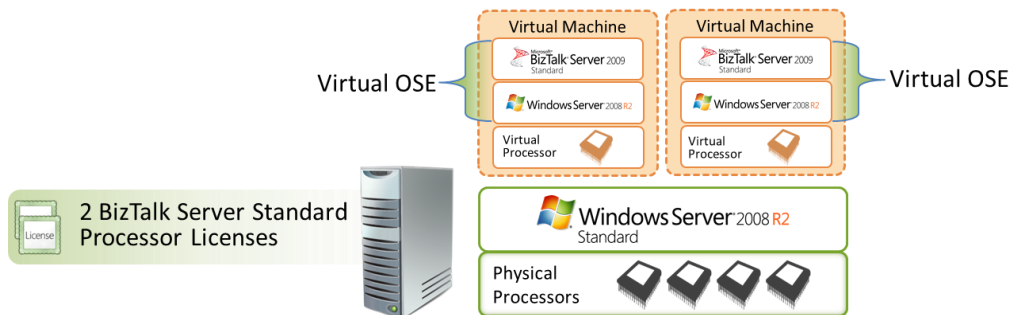
Servers—Per Core—Core License

You must have the appropriate number of core licenses for the server. You have two licensing options:

1. Physical Cores on a Server

2. Individual Virtual Operating System Environment

Licensing By Physical Cores on a Server

You can license based on all of the physical cores on the server. If you choose this option, the number of licenses required equals the number of physical cores on the server multiplied by the applicable core factor located at http://go.microsoft.com/fwlink/?LinkID=229882.

With the Enterprise Edition, for each server to which you have assigned the required number of licenses, you can run on the licensed server any number of instances of the server software in a number of physical and/or virtual OSEs equal to the number of licenses assigned to that server. Thereafter, for each additional

license that you assign to the licensed server, you can run instances of the server software in an additional OSE on that licensed server.

With the Standard Edition, for each server to which you have assigned the required number of licenses, you can run on the licensed server any number of instances of the server software in the physical OSE.

Figure 13
Per Core—Physical Cores on a Server. The number of licenses required equals the number of physical cores on the server multiplied by the applicable core factor located at http://go.microsoft.com/fwlink/?LinkID=229882, with a minimum requirement of four licenses.

| PHYSICAL CORES IN THE PROCESSOR:	1	2	4	6	8
CORE LICENSES REQUIRED:	4	4	4	6	8

Licensing By Individual Virtual Operating System Environment

You can license based on the virtual OSEs within the server in which you run the server software. If you choose this option, for each virtual OSE in which you run the server software, you need a number of licenses equal to the number of virtual cores in the virtual OSE, subject to a minimum requirement of four licenses per virtual OSE. In addition, if any of these virtual cores is at any time mapped to more than one hardware thread, you need a license for each additional hardware thread mapped to that virtual core. Those licenses count toward the minimum requirement of four licenses per virtual OSE.

For each virtual OSE for which you have assigned the required number of licenses, you have the right to run any number of instances of the server software in that virtual OSE.

Figure 14
Per Core—Individual Virtual OSE. To license a virtual machine with core licenses, purchase a core license for each virtual core (virtual thread) allocated to the virtual machine (minimum of four core licenses per virtual machine). In the example below, VM1 requires four core licenses as it has four virtual cores, and VM2 requires six core licenses as it has six virtual cores.

	VM1	VM2
VIRTUAL PROCESSORS IN THE VM:	4	6
CORE LICENSES REQUIRED:	4	6
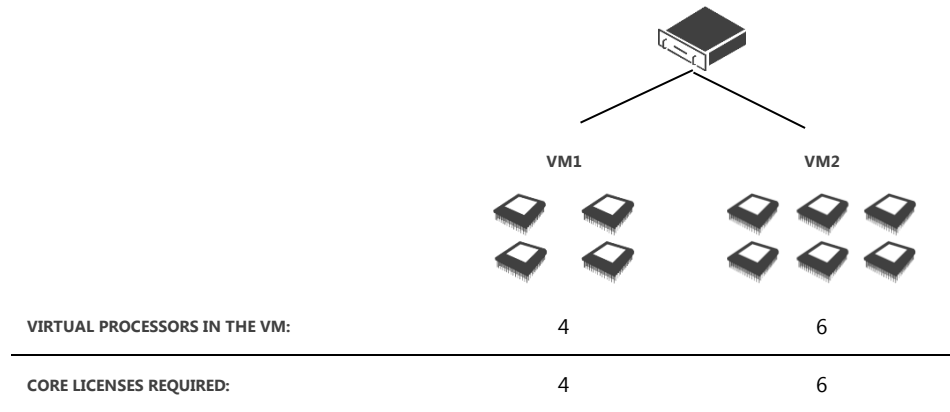
Servers—Specialty Servers—Server License

You must acquire a license for each instance of the server software you run on a server. You can run that instance in a physical or virtual operating system environment. By exception, some products provide more specific use rights. Examples of specialty servers include Windows Web Server 2008 R2 and Microsoft Search Server 2010.

Find the most current Product Use Rights document at the Volume Licensing website at http://www.microsoft.com/licensing/about-licensing/product-licensing.aspx.

Resources and Tools

Microsoft provides a number of tools and resources to help customers keep up-to-date on product licensing. The Microsoft Licensing website (http://www.microsoft.com/licensing/) has licensing terms, conditions, and supplemental information relevant to using products licensed through Microsoft Volume Licensing programs, where you can find the following:

- **Microsoft Product List:** Produced every month to provide the most current information about Microsoft software and Online Services licensed through Microsoft Volume Licensing programs.

- **Microsoft Product Use Rights:** Produced quarterly and provides information about the use rights for products currently offered under Microsoft Volume Licensing programs.

- **Volume Licensing Support Documents:** Offers additional information, such as government qualifiers, qualified educational user definitions, language options, and currency tables.

- **Microsoft Technical Limitations:** Summarizes technical limitations included in some of Microsoft's products, such as how many processors can use a specific server product at one time.

- **Worldwide Contact Information:** Helps customers get answers to product licensing questions.

In addition, Microsoft Volume Licensing briefs provide information on specific licensing topics, such as Multi-Lingual User Interface (MUI) Language Packs for Windows, Downgrade Rights Chart, and Work at Home Licenses.

New topics are added regularly, and each document is available for download. You can find the licensing briefs at the Volume Licensing website at http://www.microsoft.com/licensing/about-licensing/volume-licensing-briefs.aspx.

Managing Your Licenses

Microsoft provides a variety of online reporting services and tools that help you track and manage your Microsoft software assets.

ON-PREMISES

Microsoft Volume Licensing Service Center

The Microsoft Volume Licensing Service Center (VLSC) site provides a convenient and secure online solution for Volume Licensing customers to manage licensing agreements, enrollments, and purchases easily. With this online tool, you can manage your licenses for Open License, Open Value, Select License, Select Plus, and Enterprise Agreements. From the VLSC site, you can do the following:

- Calculate current Microsoft License Statements to view an easy-to-understand, comprehensive license summary across programs and agreements.

- View license purchases and licenses purchased to date, including expired agreements.

- View and request Microsoft Volume Licensing Product Keys (VLKs) and download licensed products based on your Volume Licensing entitlements.

- Activate and use Microsoft Software Assurance benefits.

- Manage access rights for internal staff and Software Assurance administrators.

When you enter into your Microsoft Volume Licensing agreement, the contact person you designate receives an invitation and directions for accessing the online tool. A valid email address is required when you sign the agreement to validate your VLSC account on first log on.

You can find the Microsoft Volume Licensing Service Center at the VLSC website at https://www.microsoft.com/licensing/servicecenter/.

How to Find Fulfillment Information

Stay informed about the latest product availability and updates available, access to prior versions, and other news from Microsoft related to your licensed products by visiting the Microsoft Volume Licensing fulfillment information site at http://www.microsoft.com/licensing/existing-customers/fulfillment.aspx.

Asset Management

A Software Asset Management plan that can help your organization get control of spending, save money, and stay ahead of the competition.

Learn more at the Microsoft Software Asset Management website at http://www.microsoft.com/resources/sam/default.mspx.

Product Activation—Volume Activation

To try to reduce software piracy and to make sure that all Microsoft customers receive the product quality that they expect, Microsoft includes Product Activation technology in several Microsoft licensed products that are sold through original equipment manufacturers (OEMs), retail, and Volume Licensing channels. To license the Windows operating system, Volume Licensing customers must use a type of activation called Volume Activation. These keys bypass product activation.

You can find more details at the Volume Licensing website at http://www.microsoft.com/licensing/existing-customers/product-activation.aspx.

CLOUD SERVICES

Activation of Online Services through Volume Licensing

A key difference between Online Services and on-premises Microsoft products is that Online Services reside remotely with Microsoft as the service provider and must be "activated" before they can be used.

Through the Microsoft Online Subscription Program:

- You activate through the Microsoft Online Customer Portal.
- Notification is sent to you confirming that the service is activated.
- You manage services via the Microsoft Online Administration Center (MOAC).

Through an Enterprise Agreement, Enrollment for Education Solutions, or School Enrollment:

- After the Channel Price Sheet (CPS) is signed, the Microsoft Regional Operations Center (ROC) processes the deal in the same way that on-premises software contracts are handled.
- After it is processed, the Online Customer Portal (OCP) sends an activation mail to you.
- The activation mail is sent to your organization's designated Online Services Administrator email address (same address as on your enrollment within the EA).
- When promoting a trial, use this Windows Live ID in advance to avoid migration issues (versus customer's personal Windows Live ID).
- You receive the activation mail and must activate using a Windows Live ID.
  - Deal processing and generating an activation mail should take approximately 48 hours. If you do not receive the activation mail, you or your reseller partner should contact the ROC.
- Your organization can begin using the service at any time after you have activated your service.

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CHAPTER 8: MICROSOFT SOFTWARE ASSURANCE FOR VOLUME LICENSING

Microsoft Software Assurance for Volume Licensing helps boost organizational productivity with 24 hours a day, seven days a week (24×7) support, deployment planning services, user and technical training, and the latest Microsoft software releases and unique technologies, all in one cost-effective program.

With Software Assurance, you get access to the latest software updates and other important resources and tools, such as the following:

- New product versions that help lower the costs of software acquisition by giving you discounts on upgrades and simplifying software licensing, budgeting, and administration.
- Deployment planning that gives you on-site, expert guidance and tools so that you can efficiently deploy and implement new software.
- Comprehensive training options to help reduce the costs of training IT staff or users while helping them become more efficient with Microsoft products.
- Support benefits to help maximize uptime via 24×7 phone and web support, plus access to the TechNet community of experts.
- Access to exclusive products, such as Windows 7 Enterprise and Microsoft Desktop Optimization Pack to help you efficiently manage PCs, while helping to reduce security risks.

In this chapter...

- Software Assurance Benefit Eligibility
- Available Benefits
- Getting Software Assurance
- Taking the Next Step

Software Assurance Benefit Eligibility

Eligibility for individual Software Assurance benefits may vary depending on your Volume Licensing agreement type and/or geography. The benefits are designed to support and are based on your organization's on-premises software license purchases.

For benefit eligibility information for commercial and government organizations, please visit the Software Assurance website at http://www.microsoft.com/licensing/software-assurance/default.aspx.

Available Benefits

NEW PRODUCTS

New Version Rights. Provides new software version releases so that you have access to, and licenses for, the latest technology.

Step Up License Availability. Enables you to migrate your software from a lower-level edition to a higher-level edition, such as Office Standard to Office Professional Plus, at an incremental cost avoiding full license charges.

Microsoft Desktop Optimization Pack (MDOP). Available exclusively to Software Assurance customers as an add-on subscription, MDOP employs six innovative technologies to improve desktop management that includes application virtualization, asset management, and desktop diagnostic tools.

Windows 7 Enterprise. Available exclusively to Software Assurance customers, Windows 7 Enterprise operating system offers additional valuable features to help you protect sensitive data, improve application compatibility, and simplify IT management and deployment.

DEPLOYMENT

Planning Services. Provides structured planning services from Microsoft partners to help you lower the cost and complexity of deploying new software and to help you maximize the value of your existing software. Service offerings include the following:

- Desktop Deployment Planning Services

- SharePoint Deployment Planning Services

- Exchange Deployment Planning Services

- Business Value Planning Services

TechNet Benefits for Software Assurance. Provide your IT staff with fast and convenient online access to Online Concierge Chat, Managed Forums, and additional IT resources that it needs to efficiently plan, deploy, and support Microsoft products.

Home Use Program. Offers employees the latest version of Microsoft Office for their home computer via a low-cost download. Home use helps you support flexible work environments and helps improve employee satisfaction and productivity by accelerating familiarity with the newest Microsoft Office products.

Windows Virtual Desktop Access (VDA). Windows Virtual Desktop Access lets you access virtual desktop environments from Software Assurance-covered PCs, and allows the PC's user to remotely access their virtual desktops from third-party devices such as personal PCs and hotel kiosks. This benefit can help

> **Tip...**
>
> Planning Services are typically used during the planning stages of a deployment or implementation project. They can be used at any time to help you identify, unlock, and capture greater business value from your existing Microsoft investments.

you extend the value of your virtual desktop environment by deploying your desktops anywhere, locally or in the data center, and expand user productivity with increased flexibility to access virtual desktops outside of the work environment.

Roaming Use Rights for Office, Project, and Visio. Roaming Use Rights for Office, Project, and Visio allow users with Software Assurance on Office, Project, or Visio to remotely access their software on their virtual desktops from third-party devices such as home PCs and Internet kiosks. This benefit can help expand user productivity with increased flexibility to access Office, Project, and Visio outside of the work environment and enhance the value of your virtual desktop environment.

Microsoft Office Multi-Language Pack. Enables IT to standardize and simplify deployment with a single Microsoft Office 2010 suite image, while supporting individuals who create or edit content in multiple languages.

TRAINING

Training Vouchers. Receive instructor-led technical training provided by Microsoft Certified Partners for Learning Solutions (CPLS). Using official Microsoft Learning courseware, this training can help IT professionals and developers sharpen their technical skills and prepare for deploying new software.

> ### Boosting Productivity with the Home Use Program, a Benefit of Software Assurance
>
> CH2M HILL Corporation is one of the 100 best places to work, according to *Fortune Magazine*. And it is constantly looking for ways to enhance that reputation.
>
> One important addition to its employee benefit program is its ability to offer employees the latest versions of Microsoft Office software—the same software they use on the job—for their home desktop PCs, for just the cost of materials, shipping, and handling.
>
> CH2M HILL gets that benefit as part of the Microsoft Home Use Program included with its Microsoft Software Assurance for Volume Licensing benefits. Employees have saved some U.S. $250,000 thanks to the Home Use Program, and their productivity is up—a typical employee reports a 10 percent increase. Meanwhile, calls to the help desk are down.
>
> To read the full story, visit http://download.microsoft.com/download/6/5/1/6519291d-5fad-4666-9b4f-c9b943a09b1c/SACaseCH2MHILLHUP.doc.

E-Learning. Offers self-paced, interactive training for users and IT professionals. Delivered via the Internet or intranet, these courses can help lower your overall training costs and help employees become more efficient with Microsoft products.

24×7 Problem Resolution Support. Gives you around the clock help for business-critical issues with 24 hours a day, 7 days a week phone support for all Microsoft server products, Windows, and the Microsoft Office System.

Extended Hotfix Support. Lets you waive the annual fees and required sign-up periods associated with Extended Hotfix Support Account (EHSA).

SPECIALIZED BENEFITS

"Cold" Backups for Disaster Recovery. Provides licensing for servers used as offline ("cold") backups to help you improve system availability and protect mission-critical solutions from outages caused by production server downtime.

Windows Fundamentals for Legacy PCs. Available exclusively to Microsoft Software Assurance customers, this solution allows you to continue using earlier "legacy" PCs, while improving their management and security with a small-footprint, Windows-based operating system solution. This solution works with the Microsoft Remote Desktop Connection client or third-party clients for application access.

Enterprise Source Licensing Program. Offers you access to Windows source code for internal development and support if you have 1,500 or more desktop PCs.

Spread Payments. You can spread payments for Volume Licensing and Software Assurance across three annual sums, helping you reduce your initial costs and simplify budget requirements without interest or other costs.

Note: Benefits are subject to change. Please refer to the Microsoft Volume Licensing Product List at http://www.microsoft.com/licensing/about-licensing/product-licensing-overview.aspx to verify the current benefits.

Getting Software Assurance

Regardless of whether you choose to add Software Assurance to your Volume Licensing purchase or it is included with your Volume Licensing program, you can begin using your benefits immediately and throughout the term of your license agreement. The following sections offer additional guidance for our more popular Volume Licensing programs.

MICROSOFT OPEN PROGRAMS AND SOFTWARE ASSURANCE

If you choose to purchase Software Assurance, we recommend purchasing an Open Value Agreement instead of an Open License Agreement because Open Value comes with Software Assurance.

MICROSOFT SELECT PLUS AND SOFTWARE ASSURANCE

With Select Plus, you can choose to include Software Assurance with your software purchases. And with Select Plus, we have eliminated proration based on purchase timing. As a result, you get a full 36 months of Software Assurance no matter when you purchase. To extend existing Software Assurance, you simply place a renewal order within 30 days of the expiring Software Assurance term.

Because Select Plus is an ongoing agreement that does not expire, Software Assurance can be renewed through the existing agreement. When renewing multiple Software Assurance agreements that were purchased through Select Plus at different times, the coverage period is adjusted to a common date, and

the prices prorated to reflect the coverage period, to simplify renewals and facilitate annual budgeting cycles.

MICROSOFT ENTERPRISE AGREEMENT AND SOFTWARE ASSURANCE

The Enterprise Agreement includes Microsoft Software Assurance for Volume Licensing, a comprehensive offering that helps you extend the value of your software investment. More than just maintenance, Software Assurance is a complete solution that delivers both software and services to bring more value to your business. Software Assurance combines a broad range of benefits into one program to help organizations deploy, manage, and migrate software.

Taking the Next Step

Learn more about Software Assurance at the Software Assurance website at http://www.microsoft.com/sa/. Your preferred Microsoft Volume Licensing reseller can help you acquire Software Assurance, which you can order through any Microsoft Volume Licensing program.
Use the following contact information to find a Microsoft Volume Licensing reseller:

- In the United States, call (800) 426-9400 or visit https://solutionfinder.microsoft.com/.

- In Canada, call the Microsoft Resource Centre at (877) 568-2495.

- Outside the United States or Canada, contact your local Microsoft subsidiary. To locate your local subsidiary, visit http://www.microsoft.com/worldwide/.

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