

Guide to Microsoft Volume Licensing



Guide to Microsoft Volume Licensing

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Guide to Microsoft Volume Licensing

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 support available 24 hours a day, seven days a week (24×7); 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 are 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

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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 5 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 Company-wide and Non-Company-wide options.
- ▶ **Open Value Subscription** is for customers who want to subscribe to, rather than acquire, Microsoft product licenses. Available in select countries or 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** is a Volume Licensing program for large organizations that want to subscribe to—rather than purchase—Microsoft software licenses. This program provides advantages similar to those of 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, in which 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.

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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 countries or regions, government organizations can also participate in the Open Value for Government and Open Value Subscription for Government programs. In some countries or 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 2013 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 8.1 Pro 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 acquire upgrade licenses only 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 www.microsoft.com/licensing/about-licensing/product-licensing.aspx.

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 2012 R2 Standard edition operating system license permits a running instance in up to two virtual operating system environments, plus one host instance on the physical device solely to manage the virtual instances at a time on the licensed server. With some products, such as Windows Server 2012 R2 Datacenter edition, any number of instances can run simultaneously. Both Windows Server 2012 R2 Standard and Datacenter editions require that each physical processor be licensed on the licensed server in addition to every virtual instance running at any given time on Windows Server 2012 R2 Standard.

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. You can also use the Windows Server 2012 CAL to access a server running Windows Server 2012 R2. CALs permit access to servers licensed by the same entity. They do not permit access to another entity’s licensed servers.

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Licensing Microsoft Cloud Services

In addition to traditional on-premises software licenses, Microsoft offers subscriptions to cloud services through the Microsoft Online Subscription Program. 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

For organizations with more than 250 PCs, we recommend that you add Microsoft Online Services through a Volume Licensing program such as the Enterprise Agreement. See [Chapter 2 Choosing a Volume Licensing Program for Your Organization](#) for more details. Smaller organizations should choose the Microsoft Online Subscription Program (MOSP) at www.microsoft.com/online.

Microsoft Payment Solutions

Microsoft Payment Solutions 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 Payment Solutions 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/regions around the world to offer world-class financing solutions under the Microsoft Payment Solutions program. 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.

Microsoft Payment Solutions 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 you 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 Payment Solutions 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 Payment Solutions home page at www.microsoft.com/financing for more details.

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Chapter 2: Choosing a Volume Licensing Program for Your Commercial Organization

Microsoft offers a variety of programs to help businesses of all sizes 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:

- ▶ 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.

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Microsoft Open Programs

Organizations with fewer than 250 PCs

Open Program offerings are a convenient and simple way for corporate, academic, charity¹, and government² organizations with at least 5 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).

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 from which to choose.

Company-wide Option (5 Qualified Devices Minimum)

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 desktop operating system, Microsoft Office suites, and CAL suites, plus additional software products selected in your agreement that include the following platform product options:

- ▶ Desktop operating system: Windows Pro Upgrade and Windows Enterprise Upgrade
- ▶ Microsoft Office suite: Microsoft Office Professional Plus
- ▶ CAL suites: Microsoft Core CAL Suite, Windows Small Business Server CAL Suite, and Enterprise CAL Suite

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

Non-Company-wide Option (5 Qualified Devices Minimum)

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.

¹Not available for charitable organizations in all countries/regions. Check with your reseller regarding current availability.

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

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Open Value Subscription (5 Qualified Devices Minimum)

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 (desktop operating systems, Microsoft Office suites, and CAL suites) 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.

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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 suites, Microsoft Project, Microsoft Visio drawing and diagramming software, and the Microsoft Visual Studio development system.

The **systems** pool includes the Windows operating system upgrades such as Windows 8.1 Pro and Windows 8.1 Enterprise.

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

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

- ▶ Microsoft Office Professional Plus is worth 4 points.
- ▶ Windows Server Standard is worth 15 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, refer to the Product List at www.microsoft.com/licensing/about-licensing/product-licensing.aspx.

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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 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 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 in the following table.

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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 is worth 2 points, Microsoft Online Services Subscription is worth 1 point, and Windows Server 2012 R2 Standard 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 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.

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

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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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Microsoft Enterprise Agreement

For larger organizations that want to standardize their IT.

The Enterprise Agreement (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.

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 can choose to either purchase your software licenses via the EA or subscribe to licenses via the Enterprise Subscription Agreement. With the Enterprise Subscription Agreement 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 8.1 Pro 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 Enterprise Upgrade
- ▶ Microsoft Office Professional Plus
- ▶ Core Client Access License Suite

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.

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The following enterprise products are included in the Enterprise Desktop:

- ▶ Windows Enterprise Upgrade
- ▶ Microsoft Office Professional Plus
- ▶ Enterprise CAL Suite

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

Server & Cloud Enrollment

The Server & Cloud Enrollment (SCE) is an enrollment under the Enterprise Agreement that replaces the Enrollment for Application Platform (EAP) and the Enrollment for Core Infrastructure (ECI). For customers that commit to standardizing broadly on Microsoft Server and Cloud technologies, SCE provides a range of benefits including new cloud-optimized licensing options, simplified license management, and the best pricing and terms. This includes discounts of up to 15 percent on Licenses with Software Assurance (L&SA) and 5 percent on Software Assurance, the best Windows Azure pricing and terms. Additional benefits such as full cloud management and unlimited support are also available.

How the SCE works:

1. Select from one or more of the available components you want to enroll into:
 - ▶ Core Infrastructure (Windows Server & System Center)
 - ▶ Application Platform (SQL Server, BizTalk Server & SharePoint Server)
 - ▶ Developer Platform (Visual Studio)
 - ▶ Windows Azure
2. Identify the installed base for each component in which you are enrolling. The installed base includes:
 - ▶ Any existing licenses deployed with Software Assurance
 - ▶ Any existing licenses deployed without Software Assurance
 - ▶ New licenses that are being purchased at signing
3. Ensure full Software Assurance coverage. The SCE requires full Software Assurance coverage of your installed base. This can be achieved by:
 - ▶ Renewing SA on existing licenses current with SA

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- ▶ Adding Subscription SKUs or new Licenses with Software Assurance for existing deployments that are not current with SA
4. Ensure full System Center coverage for Windows Server. The SCE requires full System Center coverage for Windows Server. This means your entire Windows Server installed base must also be licensed with System Center.

After you are enrolled in the SCE, you receive benefits including:

- ▶ Ability to run the latest version of all products enrolled
- ▶ Subscription licensing options
- ▶ 15 percent L&SA discounts and 5 percent SA discounts for the components enrolled (not including Azure)
- ▶ An additional 5 percent off Windows Azure pricing (when enrolling in any of the other three components)
- ▶ Full cloud management benefit when enrolling into the Core Infrastructure component
- ▶ Unlimited Support for qualifying customers

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 Enterprise Subscription Agreement (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:

- ▶ **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.

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- ▶ **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 over 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 (EA) software products while maintaining Software Assurance coverage on a given product. For further details, please refer to the *EA Program Guide*, available from the Volume Licensing website at www.microsoft.com/licensing/licensing-options/enterprise.aspx.

How to Determine On-Premises 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 that 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 Embedded 8.1 Industry or Windows Embedded POSReady 2009).

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 from 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.

Guide to Microsoft Volume Licensing

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 or more

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 the price they would have paid when licensing through a Select License Agreement.

- ▶ Windows Enterprise Upgrade
- ▶ Microsoft Office Professional Plus
- ▶ Core CAL Suite or Enterprise CAL Suite

New customers who enroll in the full Professional or Enterprise Platform (the Windows Enterprise operating system upgrade, Office Professional Plus, 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.

Guide to Microsoft Volume Licensing

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 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.

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, ESA, 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.

Tip...

With your Enterprise Agreement, you can license the full breadth of Microsoft Online Services as they become available.

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 8.1 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.

Guide to Microsoft Volume Licensing

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 depending on 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 subscriptions, 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.

Guide to Microsoft Volume Licensing

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		

¹Original equipment manufacturer (OEM)

²Full-package product (FPP)

³Online Services refer to applications hosted at Microsoft Data Centers with client applications that may or may not be installed locally.

⁴License-only purchases (that is, without Software Assurance) must be paid up front.

⁵Additional media must be obtained separately at a cost.

Guide to Microsoft Volume Licensing

Taking the Next Step

- ▶ Microsoft License Advisor (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 share your quote securely with a Microsoft reseller.
- ▶ 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 www.microsoft.com/licensing/worldwide.aspx.

Guide to Microsoft Volume Licensing

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.

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 country or region. You also can review the eligibility requirements at the Volume Licensing website at 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.

US Federal Civilian Agencies

Microsoft offers preferred pricing to US 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 www.microsoft.com/industry/government/howtobuy/federal/default.aspx.

To learn more about programs for US federal government departments and agencies, visit 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.

Guide to Microsoft Volume 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 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.

Guide to Microsoft Volume Licensing

Midsized and Large Government Organizations

For midsized 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.

Guide to Microsoft Volume Licensing

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	EA for Government	EA Subscription 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				

¹OEM

²FPP

³Online 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.

⁴Not available in some countries/regions. Contact your reseller to check current availability.

Note: Additional programs exist for government partners in certain countries/regions where Standard Indirect forms are not used.

Guide to Microsoft Volume Licensing

Taking the Next Step

- ▶ Microsoft License Advisor (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 share your quote securely with a Microsoft reseller.
- ▶ 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

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

Worldwide

Organizations outside of the United States should contact the local Microsoft office. Find contact information at 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 www.microsoft.com/industry/publicsector/government/default.msp.
- ▶ Discover more about what Volume Licensing can do for your organization at www.microsoft.com/licensing.
- ▶ Review a list of the products that are available under Microsoft Volume Licensing at www.microsoft.com/licensing/about-licensing/product-licensing.aspx#tab=2.
- ▶ View the government eligibility requirements at www.microsoftvolumelicensing.com/userights/DocumentSearch.aspx?Mode=3&DocumentTypeId=6.

Guide to Microsoft Volume Licensing

Chapter 4: Choosing a Volume Licensing Program for 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.
- ▶ **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 country or region, contact your Microsoft subsidiary or software reseller.

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

Guide to Microsoft Volume Licensing

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 country or region and if you qualify. Eligibility definitions are available at the Volume Licensing website at www.microsoftvolumelicensing.com/userights.

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 from the Open License for Charities webpage at www.microsoft.com/licensing/licensing-options/charity-resellers.aspx.
- ▶ Discover more about what Volume Licensing can do for your organization at www.microsoft.com/licensing.
- ▶ Learn how to request a software donation for your charitable organization at www.microsoft.com/about/corporatecitizenship/en-us/nonprofits/whos-eligible/.

Guide to Microsoft Volume Licensing

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.

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. In addition, 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.

Guide to Microsoft Volume Licensing

Helping your institution get the most value from your software investment, Select Plus for Academic benefits includes 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 that gives you 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) because Software Assurance is automatically prorated to your third affiliate account anniversary, eliminating the need to track multiple Software Assurance coverage expiration dates.

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.

Guide to Microsoft Volume Licensing

Student Licensing

With the following options, 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).

With the **Student Advantage** benefit, when you license Office 365 ProPlus or Office Professional Plus organization-wide for all of your faculty and staff employees through the EES program, you qualify for no-cost Office 365 ProPlus subscription licenses for your students through the EES Student Option.

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, use the AER Finder tool at the Microsoft Education website at 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 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 use the software only 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 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 membership is 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 www.dreamspark.com.

Guide to Microsoft Volume Licensing

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 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.

Taking the Next Step

- ▶ Visit www.microsoft.com/licensing/licensing-options/for-industries.aspx#tab=2 to learn more about your options.
- ▶ Microsoft License Advisor (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 share your quote securely with a Microsoft reseller.
- ▶ 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 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 at www.microsoft.com/worldwide or visit your regional Microsoft Licensing website at www.microsoft.com/licensing/worldwide.aspx.

Guide to Microsoft Volume Licensing

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 that are 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 that 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.

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; 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, 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.

Guide to Microsoft Volume Licensing

- ▶ **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://mspartner.microsoft.com/en/us/Pages/Solutions/isv-royalty-licensing-distributors.aspx>).

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

Guide to Microsoft Volume Licensing

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.

Tip...

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

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.

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.

Guide to Microsoft Volume Licensing

- ▶ **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 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/40191733>. You must also join the Microsoft Hosting Community (via the same website). For information on how to join the Microsoft Partner Network, view <https://mspartner.microsoft.com/en/us/Pages/Membership/enroll.aspx>.
- ▶ **Designate a licensed products reseller.**
Work with an 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 US\$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 www.microsoftvolumelicensing.com/userights/DocumentSearch.aspx?Mode=3&DocumentTypeId=2.

Additional SPLA Requirements:

1. **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 an SPLA.
2. **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 an SPLA reseller: www.microsoft.com/hosting/en/us/licensing/splahowto.aspx.

Guide to Microsoft Volume Licensing

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.

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.

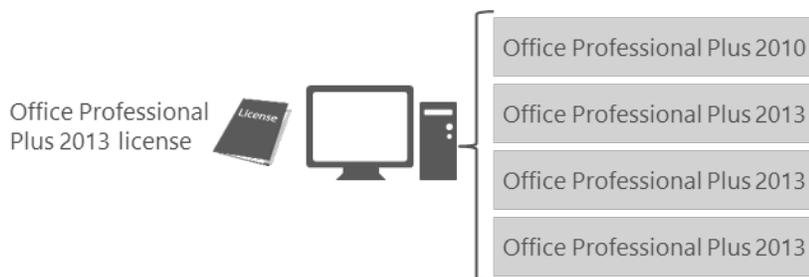


Figure 1: You can install more than one copy on the licensed device. You can access copies of the software installed on a network device only from a device that has a license for the software.

Guide to Microsoft Volume Licensing

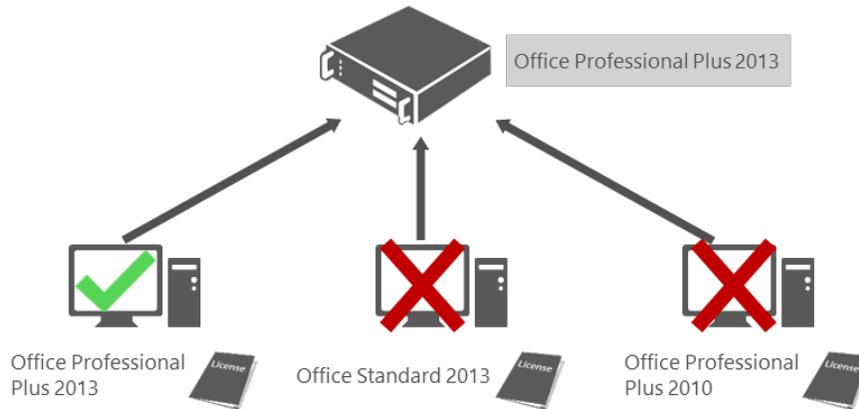


Figure 2: The device you use to access software remotely must be licensed for the same or higher edition, but not a lesser edition.

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 acquire upgrade licenses only 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 provided in the Product List, which you can find at www.microsoft.com/licensing/about-licensing/product-licensing-overview.aspx.

If you acquire Software Assurance, you have the right to run up to four additional copies or instances on the device.

Guide to Microsoft Volume Licensing

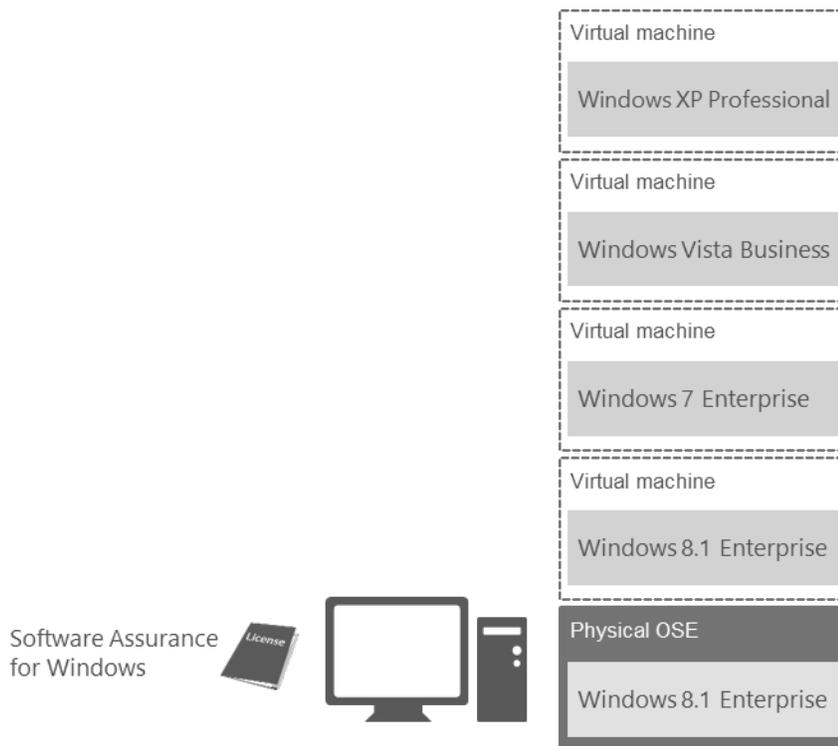


Figure 3: A device with active Software Assurance may have Windows 8.1 Enterprise running in the physical operating system environment and a mix of Windows editions and versions running in four virtual operating system environments all on the same physical device.

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.

Guide to Microsoft Volume Licensing

- ▶ **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.microsoftonline.com.

Servers—Operating Systems—Processor License + CAL + 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 2012 R2 Standard edition license permits up to two OSEs at a time on the licensed server. With some products, such as Windows Server 2012 R2 Datacenter edition, you can run any number of instances at the same time.

Operating System	Permitted Instances on a Single Server (Physical OSE + Virtual OSEs)
Windows Server 2012 R2 Standard	1* + 2
Windows Server 2012 R2 Datacenter	1+ Unlimited

*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.

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

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.

Guide to Microsoft Volume Licensing

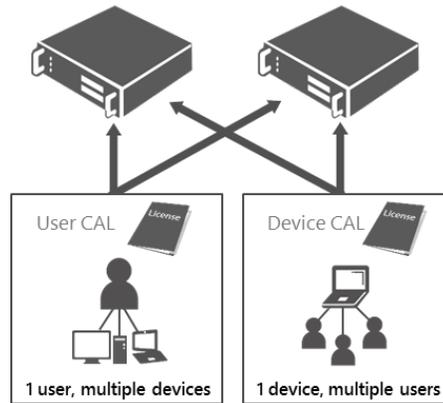


Figure 5: CAL assignment based on user or device.

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.

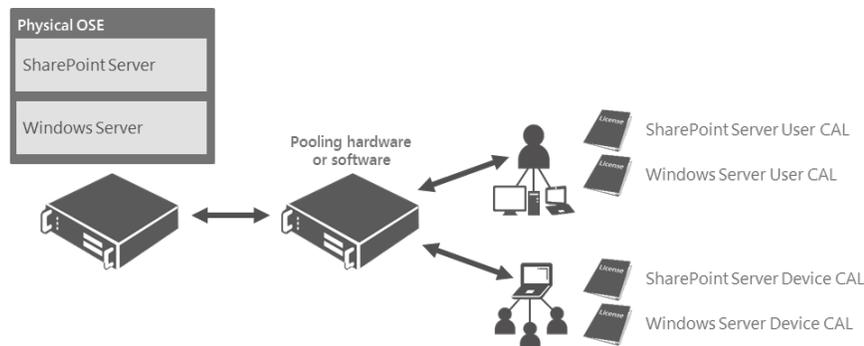


Figure 6: Multiplexing: Users and devices can indirectly access the Windows or SharePoint Server software as shown in the diagram. Indirectly accessing the server software does not negate the requirement for a CAL. In the example, each user and/or device on the right is required to have a Windows Server 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-specific 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.

Guide to Microsoft Volume Licensing

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 R2 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.

Guide to Microsoft Volume Licensing

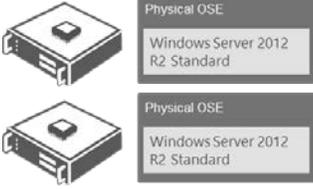
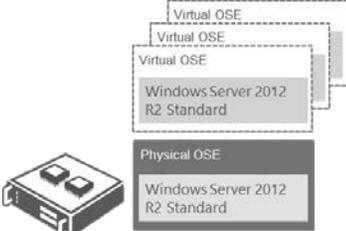
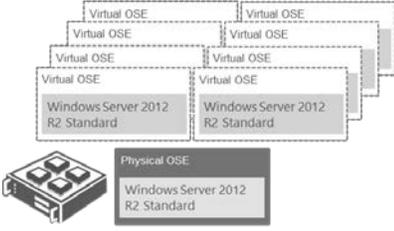
Server Configuration	Standard Server MLs Required	Datacenter Server MLs Required	Rationale
2 one-processor servers, non-virtualized 	2	2	A one-processor server requires at least one Server ML. A single Server ML cannot be used to license 2 one-processor servers.
1 four-processor server, non-virtualized 	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.

Figure 7: Examples of server ML requirements.

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).

Guide to Microsoft Volume Licensing



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.

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.

Guide to Microsoft Volume Licensing

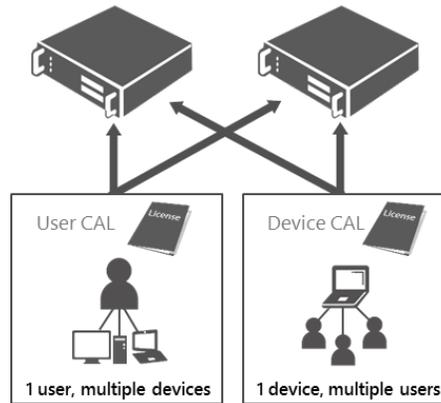


Figure 10: CAL assignment based on user or device.

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 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

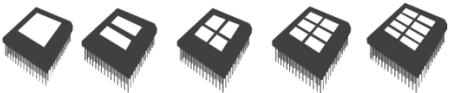
Licensing by Physical Cores on a Server

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 in the [SQL Server Core Factor Table](#) (PDF, 173 KB).

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.

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

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 in the [SQL Server Core Factor Table](#) (PDF, 173 KB) with a minimum requirement of four licenses.

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.

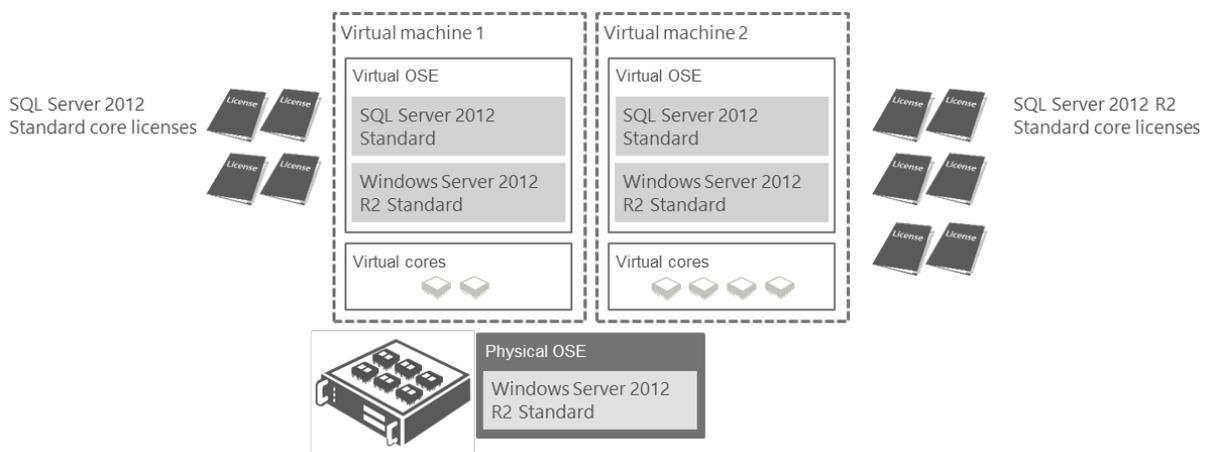


Figure 14: Per Core—Individual Virtual Machines. To license a virtual machine with core licenses, purchase a core license for each virtual core (virtual thread) allocated to the virtual machine (minimum of four core licenses per virtual machine). In the example below, virtual machine 1 requires four core licenses as it has four virtual cores, and virtual machine 2 requires six core licenses as it has six virtual cores.

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 Server 2012 R2 Essentials Web Server 2008 R2 and Microsoft Dynamics CRM Workgroup Server 2013 Search Server 2010.

Guide to Microsoft Volume Licensing

Find the most current Product Use Rights document at the Volume Licensing website at 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](#) has licensing terms, conditions, and supplemental information relevant to using products licensed through Microsoft Volume Licensing programs. The following information is available from the site:

- ▶ **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 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) 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.

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You can find the Microsoft Volume Licensing Service Center online 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 get other news from Microsoft related to your licensed products by visiting the Microsoft Volume Licensing fulfillment information site at www.microsoft.com/licensing/existing-customers/fulfillment.aspx.

Software Asset Management

A Software Asset Management plan 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 www.microsoft.com/resources/sam/default.aspx.

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 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 the deal is processed, the Online Customer Portal (OCP) sends an activation email to you.
- ▶ The activation email 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 Microsoft account (formerly Windows Live ID) in advance to avoid migration issues (versus customer’s personal Microsoft account).
- ▶ You receive the activation email and must activate by using a Microsoft account.
- ▶ Deal processing and generating an activation email should take approximately 48 hours. If you do not receive the activation email, 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.

Guide to Microsoft Volume Licensing

Chapter 8: Microsoft Software Assurance for Volume Licensing

Microsoft Software Assurance for Volume Licensing helps boost organizational productivity with support available 24 hours a day, seven days a week (24×7), 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 through 24×7 phone and web support, plus access to the TechNet community of experts.
- ▶ Access to exclusive products, such as Microsoft Desktop Optimization Pack to help you efficiently manage PCs, while helping to reduce security risks.

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, visit the Software Assurance website at www.microsoft.com/licensing/software-assurance/default.aspx.

Available Benefits

New Products

- ▶ **New Product Versions.** Provides new software version releases so you have access to the latest technology.
- ▶ **Step-Up Licensing.** 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 a low cost.
- ▶ **Microsoft Desktop Optimization Pack (MDOP).** MDOP is an optional subscription add-on that enables businesses to virtualize the operating system applications, and the user experience; manage Windows features, and restore user productivity after a system issue.

Deployment

- ▶ **Planning Services.** Get in-depth planning assistance from qualified Microsoft partners or Microsoft Services to help you plan on-premises, cloud-based, or hybrid software deployments.
- ▶ **License Mobility.** Deploy certain server application licenses purchased under your Volume Licensing agreement in an Authorized Mobility Partner's data center.

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.

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- ▶ **Windows Virtual Desktop Access (VDA) Rights.** Access virtual desktop environments from Software Assurance-covered PCs, and allows the PCs users to access their virtual desktops remotely from third-party devices such as personal PCs and hotel kiosks.
- ▶ **Windows To Go Use Rights.** Run a fully manageable corporate desktop running Windows 8.1 Enterprise edition on a bootable USB stick on any licensed device.
- ▶ **Roaming Use Rights for Windows.** Allows the primary user any licensed device to access a virtual instance of Windows running in the datacenter (VDI) or Windows To Go from non-corporate devices such as personally owned or hotel business center PCs while away from the office.
- ▶ **Roaming Use Rights for Office, Project, and Visio.** Remotely access software on your virtual desktops from third-party devices such as home PCs and Internet kiosks.
- ▶ **Windows Companion Subscription License (CSL).** The Windows CSL is an optional subscription add-on that grants the primary user of a licensed device the rights to access a corporate desktop through either a VDI or Windows To Go on up to four devices capable of leveraging these technologies. Devices eligible for licensed use include any type of personally owned device as well as corporate-owned non-x86 devices.
- ▶ **Windows RT Companion VDA Rights.** Windows RT Companion VDA Rights provide the primary user of a licensed device with rights to access a corporate desktop through a VDI from a corporate-owned companion Windows 8.1 RT or Windows RT device with no additional Windows license required.
- ▶ **Enterprise Sideloading of Windows 8.1 Apps.** Receive the use rights required to enable deployment of touch-optimized Windows 8.1 apps directly to devices within an organization instead of having to install them through the public Windows Store.
- ▶ **Windows Thin PC.** A smaller footprint version of Windows 7 that enables organizations to repurpose existing PCs as thin clients, thereby reducing the need for new thin client hardware. This benefit applies only to devices licensed with Software Assurance for Windows.
- ▶ **Microsoft Office Multi-Language Pack.** Enables IT to deploy a single Office image with support for 37 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.
- ▶ **E-Learning.** Offers self-paced, interactive training for users and IT professionals. Delivered over the Internet or an intranet, these courses can help lower your overall training costs and help employees become more efficient with Microsoft products.
- ▶ **Extended Hotfix Support.** Waives the annual fees and required sign-up periods associated with Extended Hotfix Support Account (EHSA).
- ▶ **Home Use Program.** Provides employees with the latest version of Microsoft Office for their home computer, via low-cost download.
- ▶ **TechNet Benefits through Software Assurance.** Gives IT staff access to experts, technical information, plus beta and final versions of products for testing and evaluation.

Support

- ▶ **24x7 Problem Resolution Support.** Provides around-the-clock phone and web incident support for Microsoft server and desktop products.

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- ▶ **System Center Advisor.** Helps organizations assess their server configurations to proactively avoid problems, reduce downtime, and improve performance.
- ▶ **Extended Hotfix Support.** Provides specific product fixes on a per customer incident basis, beyond the standard product support.

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.
- ▶ **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. To verify current benefits, refer to the Microsoft Volume Licensing Product List at www.microsoft.com/licensing/about-licensing/product-licensing-overview.aspx.

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. Software Assurance is automatically prorated to your third affiliate account anniversary, eliminating the need to track multiple Software Assurance coverage expiration dates. 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.

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Taking the Next Step

Learn more about Software Assurance at the Software Assurance website at 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 <http://pinpoint.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 www.microsoft.com/worldwide.

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