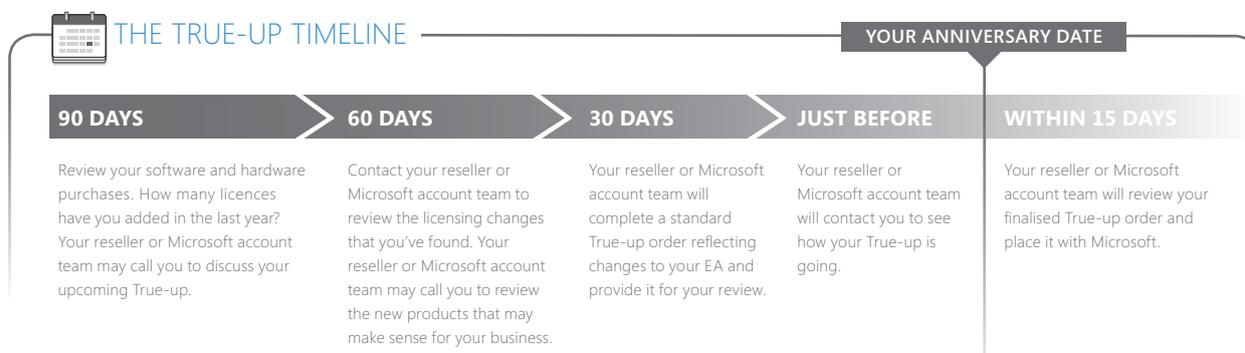**Microsoft**®

The True-up Guide

Helping you through the process.

With an Enterprise Agreement (EA) from Microsoft, you get the flexibility that you need to help grow your business — without stopping to purchase incremental licences every time you need them. Then, once a year, you are required to align your EA with the total number of licences that you've added in the previous 12 months. This is the True-up process: an inventory of all the qualified desktops, users and processors that have been added to your organisation over the course of the year, along with any additional product use requiring a licence from Microsoft. It gives you a chance to ensure that you are managing and tracking your licences efficiently. When you know what software you have and what you are actually using, you get a better picture of your business to help you to plan for the future.

This guide is designed as a single point of reference to help you simplify and streamline the True-up process. If you have questions at any time, you can contact your reseller or Microsoft account team for assistance. You will find their latest contact information listed on your Summary of Agreements. You can also visit **www.microsoft.com/licensing**.

THE TRUE-UP TIMELINE

YOUR ANNIVERSARY DATE

90 DAYS	60 DAYS	30 DAYS	JUST BEFORE	WITHIN 15 DAYS
Review your software and hardware purchases. How many licences have you added in the last year? Your reseller or Microsoft account team may call you to discuss your upcoming True-up.	Contact your reseller or Microsoft account team to review the licensing changes that you've found. Your reseller or Microsoft account team may call you to review the new products that may make sense for your business.	Your reseller or Microsoft account team will complete a standard True-up order reflecting changes to your EA and provide it for your review.	Your reseller or Microsoft account team will contact you to see how your True-up is going.	Your reseller or Microsoft account team will review your finalised True-up order and place it with Microsoft.

UPON TRUE-UP COMPLETION
Your purchase history and licence summary will be updated and available for viewing via the Volume Licensing Service Centre website at **www.microsoft.com/licensing/servicecenter**.

Need help?
Contact your reseller or Microsoft account team. Or check the Microsoft Volume Licensing Services website at **www.microsoft.com/licensing**.

About your Enterprise Agreement.

A Microsoft EA offers your organisation a cost-effective way to acquire the latest Microsoft technology to help standardise your IT infrastructure and simplify licence management. Because you need to place only one order per year, your EA can also streamline the procurement process and reduce the time spent managing your software licences.

Your EA has a three-year term, with the option to be renewed after each cycle. As part of the EA, your company is required to perform an annual True-up inventory to identify the number of qualified desktops and users, servers, CPUs, computers and other devices running Microsoft software and to take into account any licences that may have been added during the previous 12 months. This inventory is required at the end of each of the three years of the agreement.

While you may place any number of orders throughout the calendar year, the annual True-up order must be submitted in the period between 60 days prior to and 15 days after the anniversary of the EA enrolment date.

If you have not used any additional EA products within the calendar year, you are still responsible for submitting an Update Statement (zero-usage order), which must be signed by an authorised signatory within your organisation. However, if you have started using Microsoft products that are not included in your EA, you will need to talk with your reseller or Microsoft account team about placing a new order to have these products added to your EA.

Your business is changing — how does that affect your EA?

Your organisation is unique and its systems, applications and services are tailored to meet your enterprise requirements. As a result, an enterprise has many different configurations of servers, Client Access Licences (CALs), management servers, operating systems and desktop computer applications that may be in use at any one time. Because of this, your system configuration may change over the course of the EA licence cycle and result in an increase in some licensed products. The True-up process provides a simple, effective way to account for any increase in licensed products and to ensure that your licensing is current and accurate.

These systems and services vary with each customer, so a number of licensing scenarios can apply. We suggest that you ask the following kinds of questions to help to identify possible areas of growth and change:

- ☐ Did our computer or employee (user) base grow this year?

- ☐ Did we make any acquisitions?

- ☐ Did we increase the number of our servers? Did we cluster any servers?
  Did we set any of them for warm or hot disaster recovery?

- ☐ Have we deployed any virtualised server or desktop environments?

- ☐ Did we roll out any desktop applications, such as Microsoft Office Project, Microsoft Office Visio, Microsoft Office OneNote or Microsoft MapPoint?

- ☐ Did we put into production any piloted products or applications?

- ☐ Are we using Microsoft Systems Management Server to provide data for the True-up?

- ☐ Do we have an effective Software Asset Management (SAM) programme in place?

Methods for inventorying EA licences.

Multiple product categories are licensed under the EA agreement, depending on the licensing offers that you have chosen, all of which need to be reconciled as part of the annual True-up:

• Enterprise Products: This is the core product set under your EA, which is licensed according to the total Qualified User or Qualified Desktop count for your organisation.

• Additional Products: This list includes any product other than an Enterprise Product that you have chosen to license under your EA Enrolment. Product licensing requirements vary according to the product.

• Application Platform products: This core product set is under your Enrolment for Application Platform. Inventory timing requirements depend upon your chosen True-up option.

• Core Infrastructure products: This core product set is under your Enrolment for Core Infrastructure.

It is important that the inventory addresses all of these categories as they apply to your organisation. Because of the differences in how the products are licensed, an organisation could have growth in the use of Additional Products, even in a year where the desktop or user count remained unchanged. Understanding the software assets within your organisation can help you to maintain control of your business and optimise your resources to match your business strategy. Accurately tracking your software inventory will provide benefits far beyond the annual True-up process with Microsoft. Although the complexities of managing software across an organisation can be challenging, there are some consistent methods that can provide structure to inventorying your EA licences.

Your company's inventory approach will depend on your system set up. Here are three different methods for inventorying EA licences:

GET HELP FROM A SAM PARTNER.

Consulting with a Microsoft SAM partner can help you to assess your software environment and build a customised process to conduct True-ups quickly, accurately and in a repeatable way. Microsoft SAM partners are experts in Software Asset Management processes, discovery tools and Microsoft licensing. A cost-effective SAM engagement gives you the data that you need to complete your True-up and a customised plan for managing software assets and future True-up reviews.

Your Microsoft account team can help to connect you with a SAM partner and get you started with a SAM engagement for your True-up.

USE AUTOMATED TOOLS AND PROCESSES.

You may already use a software inventory tool to help to manage your software assets and this tool is useful during the True-up process. A SAM partner can work with your existing tools or help you to identify new ones that can help you to streamline your True-up inventory.

Microsoft Systems Management Server is a self-monitoring system that makes it easy to compare inventory over any number of years. It can help you to automate device discovery and collect hardware and software inventory from servers, mobile devices and terminal-based clients to produce a standard inventory report.

Your reseller or Microsoft account team should work with you to review the results of your inventory report and adjust EA licences as necessary. Consider both your hardware purchases and overall licensing usage throughout the True-up time frame.

TAKE A MANUAL INVENTORY.

Enlist your staff in helping you to take an inventory of your environment and to document all servers, computers (desktops, laptops and terminals) and mobile devices that use Microsoft-licensed software. If you are participating in a SAM engagement, your SAM partner can help you to identify ways to streamline this process, depending upon your unique set up and needs.

Get started on your True-up!

What systems need to be inventoried?

During your True-up process, the following elements should be inventoried:

✓ Devices, including all servers, computers (desktops, laptops and terminals), and mobile devices that use Microsoft-licensed software. You must document the number of the devices and the service date.

✓ The number of qualifying, underlying operating system (OS) licences on desktops, including the type of OS and service date.

✓ All Microsoft application software. The application systems listed to the right are representative of the EA application components that your EA may cover and are thus possibly part of the True-up exercise. Note: This is a partial list for reference only. For the most current product list, go to **www.microsoft.com/licensing/about-licensing/product-licensing.aspx#tab=2**.

✓ The number of User CALs and Device CALs within your enterprise. User CALs provide a many-to-one relationship and allow multiple users to use a single device to access software (for call centre terminals and airport kiosks, for example). Device CALs provide the familiar one-to-one relationship for a device to access software. Windows Server 2003 R2 allows you to set a server to accept either of these CALs, but not both at the same time, so it is very important to inventory and review this information during your True-up process.

Looking forwards: Best practices.

Perform a SAM review.

Your annual True-up event is an ideal time to perform a Software Asset Management review. SAM is a set of industry best practices that can help you to control costs, improve compliance and security and anticipate future software needs as your company grows. Visit **www.microsoft.com/sam** for tips and tools to help you to perform a software inventory. Additionally, Microsoft has hundreds of accredited SAM partners that are able to provide cost-effective True-up assistance. To learn more or find a SAM partner near you, go to **www.microsoft.com/sam** and click on the Partner tab.

Use this year to prepare for next year.

After you complete the True-up process, you should retain a copy of your inventory to use in the future. This copy is especially important if you are completing the process manually. We also recommend that you consider performing interim quarterly inventories of your licensed IT infrastructure in order to reduce the time it takes to perform the annual True-up exercise. An established SAM strategy can help to streamline this process.

Resources and Support.

• If you need more information, please visit **www.microsoft.com/licensing**.

• For additional questions regarding Microsoft Volume Licensing Services or Software Assurance benefits, please contact your reseller or Microsoft account team or call your local Volume Licensing Service Centre support number, which you can find at **www.microsoft.com/licensing/servicecenter/Help/Contact.aspx**.

• For more information on Software Asset Management, please visit **www.microsoft.com/sam** to download a SAM Optimisation Kit or to find an accredited SAM partner.

Microsoft Servers

- BizTalk Server Branch, Standard and Enterprise Editions
- Commerce Server Standard and Enterprise Editions
- Dynamics CRM Professional and Enterprise Servers
- Dynamics CRM Workgroup Server
- Exchange Server Standard and Enterprise
- FAST Search Server for SharePoint
- Forefront Threat Management Gateway Standard and Enterprise Editions
- Forefront Unified Access Gateway
- Groove Server
- Identity Lifecycle Manager (ILM)
- Office Communications Server Standard and Enterprise Editions
- Project Server
- Search Server
- SharePoint Server
- SharePoint Server for Internet Sites Enterprise
- SQL Server Enterprise, Small Business Edition, Standard, Workgroup and Web
- System Centre Configuration Manager
- System Centre Data Protection Manager
- System Centre Essentials
- System Centre Operations Manager
- System Centre Reporting Manager
- System Centre Virtual Machine Manager
- System Centre Virtual Machine Manager Workgroup Edition
- Virtual Earth Server
- Virtual Server Standard and Enterprise Editions
- Visual Studio Team Foundation Server
- Visual Studio Team Lab Management
- Windows HPC Server
- Windows Server HPC Edition
- Windows Server HPC Edition without Hyper-V
- Windows Server Standard, Enterprise and Datacentre
- Windows Web Server

Microsoft Operating Systems*

- Windows 7 Professional
- Windows 7 Enterprise

Microsoft Desktop Applications

- Microsoft Office Professional Plus**
- Microsoft Office Project Professional
- Microsoft Office Project Standard
- Microsoft Office Visio Professional
- Microsoft Office Visio Standard

* Note: Windows desktop operating system upgrade licences offered through the EA are not full licences, and require a qualifying, underlying operating system licence for each Qualified Desktop on which the upgrade licence is deployed. True-up for Windows OS upgrade is based upon Qualified Desktop count.

**True-up for Office Professional Plus is based upon Qualified Desktop count.