



## Quick Guide

### **SAM** makes business sense.

By taking a proactive role in software management you can assure you're getting the most out of your software assets.

#### 1. Learn about licensing basics

This document contains information on software licensing. Additional information can be found on the Microsoft Licensing site (<http://www.microsoft.com/licensing>).

#### 2. Inventory your software

You can analyze which software titles you're using on your company's PCs and workstations by performing a manual inventory or by using a tool to generate software inventory reports. You can find more information on these tools in the Microsoft Software Inventory and Asset Management Tools Catalog (<http://www.microsoft.com/resources/sam/sit>).

#### 3. Match licenses with software

Find the licensing documentation for each software title you have discovered during the software inventory process. More information is available in this document to help you determine what to look for.

#### 4. Review your policies and procedures

Does your company have existing policies outlining software use and acquisition procedures?

If so, review them to assure they are still applicable. If you have no current policies, now is a good time to write them. Contact your license management services provider for a sample template or help developing policies and procedures.

#### 5. Implement a software asset management plan

Once you've worked with your software provider to obtain the appropriate number of licenses for your software, put a plan in place to keep the process moving forward.



## Retail Product

**Company Size**  
Less than 5 PCs

**Customer Types**  
Home, Corporate, Academic

### Most likely customers

Customers with small-volume software needs

### How the program works

Purchase in single-unit quantities at retail outlets.

### Benefits

Quick and easy

### Where to buy?

Retail outlets and Microsoft resellers

### How can I tell if it's genuine Microsoft product?

Certificate of Authenticity (COA) on box top and CD with edge-to-edge hologram for Microsoft Office and Microsoft Windows desktop operating system products

### Where should I look for the terms of my agreement with Microsoft?

End User License Agreement (EULA) included online within the software product

### What records should I keep to assess license compliance?

COA, EULA, media, purchase invoice and receipt

For more information go to <http://www.howtotell.com>



## Software preinstalled on new PCs - OEM Product

**Company Size**  
Any

**Customer Types**  
Home, Corporate

### Most likely customers

Customers purchasing new PCs

### How the program works

When you purchase a new PC, make sure it comes preinstalled with an operating system such as Microsoft Windows. Note that full operating systems are only available via the OEM and Retail programs and not via volume licensing.

### Benefits

Easy and convenient

### Where to buy?

Available only with new PC hardware

### How can I tell if it's genuine Microsoft product?

Look for a Certificate of Authenticity (COA) affixed to the PC. You may also receive a software program CD that will be marked with either the PC manufacturer's brand or a hologram. For more information please go to <http://www.howtotell.com>.

### Where should I look for the terms of my agreement with Microsoft?

An End User License Agreement (EULA) is included online within the software product. The agreement is between the PC manufacturer and end-user.

### What records should I keep to assess license compliance?

COA, EULA, media, PC purchase invoice and receipt

For more information go to <http://www.howtotell.com>



## Open License 6.0

**Company Size**  
5 or more PCs

**Customer Types**  
Corporate, Academic, Charity, Government

### Most likely customers

Customers wanting an easy, one-time transaction process.

### How the program works

You determine the number and type of software you need, place an order with a participating reseller, and obtain the licenses you need. You may then install software by ordering media directly from Microsoft.

### Benefits

Easy to use and understand, offers volume discounts with minimum license requirements

### Where to buy?

Any Microsoft reseller

### How can I tell if it's genuine Microsoft product?

Log on to the eOpen website (<https://eopen.microsoft.com>) for your record of product acquisitions.

### Where should I look for the terms of my agreement with Microsoft?

Your Microsoft Open License agreement is available on the eOpen website (<https://eopen.microsoft.com>).

### What records should I keep to assess license compliance?

Your order confirmation is posted on the eOpen website (<https://eopen.microsoft.com>). You'll need your Open License authorization number(s) to verify your order confirmations.



## Select License 6.0

**Company Size**  
250 or more PCs

**Customer Types**  
Corporate, Academic, Government

### Most likely customers

Organizations with mixed Microsoft license requirements, decentralized purchasing, and the ability to forecast purchases.

### How the program works

After you have signed your Select License agreement, you'll receive Microsoft software CDs based on the product pools you've selected. On a monthly basis, submit an order to your Large Account Reseller (LAR) for the number of units of Microsoft software you've installed during the past month. The LAR will pass the order on to Microsoft.

### Benefits

Greater discount levels, larger volume forecasts.

### Where to buy?

Microsoft Large Account Resellers (LARs)

### How can I tell if it's genuine Microsoft product?

Log on to the Microsoft Volume Licensing Services website (<http://licensing.microsoft.com>) for a record of your order confirmations.

### Where should I look for the terms of my agreement with Microsoft?

Your signed Select License agreement with Microsoft and Product Use Rights Attachment.

### What records should I keep to assess license compliance?

Order confirmation information is available at the Microsoft Volume Licensing Services site (<http://licensing.microsoft.com>). Refer to your Select License agreement for additional proof of license requirements.

**Microsoft Enterprise Agreement** and **Microsoft Enterprise Subscription Agreement** are other licensing options available to large organizations.