

How to decide which license is best for your organization

Fewer than 250 PCs

The Open License program's flexibility and low-entry requirements make it a great program for companies that have between five and 250 computers. They are generally available through retail stores, solution providers, and online vendors. There are three Open License program offerings to choose from:

- **Open Value.** For companies with as few as five desktops that would like the advantages of Software Assurance and the ability to spread payments annually. With an Open Value agreement, you can simplify license tracking, spread your payments over three years, and give your organization greater flexibility and control over the upgrade cycle.
- **Open License Volume.** For customers able to acquire 500 points in a single pool up front. This offering provides additional potential savings compared with the other Open License offerings.
- **Open License Business.** This program requires an initial acquisition of only five licenses. Software Assurance may also be added onto this agreement.

More than 250 PCs

If your organization has more than 250 computers, consider the Select License, Enterprise Agreement, or Enterprise Subscription Agreement programs, which may fit your organization's software needs and acquisition models more closely. These programs are offered through Microsoft Large Account Resellers (LAR) and Microsoft Enterprise Software Advisors (ESA).

- **Select License** is designed for companies with mixed software and acquisition requirements. Select License customers receive a volume price level for each pool of software selected (applications, systems, or servers) based on a three-year software forecast. At the end of the agreement, the customer can continue to use the software properly licensed and paid for; however, any Software Assurance that was acquired must be renewed in order to continue receiving the associated benefits.
- **Enterprise Agreement** is designed for companies that prefer to standardize their Microsoft software throughout their organization based on the Microsoft enterprise products (Microsoft Office Professional Edition 2003, Windows Professional desktop operating system upgrade, and Core Client Access License) at prices based on a three-year agreement term. At the end of the agreement, the customer can continue to use the software properly licensed and paid for; however, any Software Assurance that was acquired must be renewed in order to continue receiving the associated benefits.
- **Enterprise Subscription Agreement** is designed for companies that prefer to standardize their Microsoft software throughout their organization based on the Microsoft enterprise products (Microsoft Office Professional Edition 2003, Windows Professional desktop operating system upgrade, and Core Client Access License) at prices based on a three-year agreement term. At the end of the subscription, the rights to use the software end and the customer must either uninstall the software or renew its Enterprise Subscription enrollment.

Consolidate your Software Assurance coverage and save money

If you are a customer with multiple Microsoft licensing agreements, you may find you need to manage various Software Assurance expiration dates—we understand that at times this makes it difficult to track versions and control your budget.

You can now consolidate your Software Assurance coverage from an expiring agreement into another active volume licensing agreement. When you consolidate, there's no need to sign a new license agreement for that existing Software Assurance coverage. This allows you to reduce the overall number of agreements you must manage and track, therefore reducing the risk of allowing your Software Assurance coverage to lapse in the future.

Additional resources

Visit our Renewal Planning Center at: <http://www.microsoft.com/renew>

At the Renewal Planning Center you'll find resources to help you:

1. Get the facts about Software Assurance, including:
 - Answers to the most frequently asked questions about Software Assurance
 - Case studies detailing how other companies make maximum use of their Software Assurance benefits
2. Learn the full value of renewing your Software Assurance agreement, including:
 - Microsoft product release calendar to help you plan for scheduled upgrades
 - A downloadable copy of the latest Microsoft licensing study by Forrester Research, detailing the cost savings and productivity benefits of Software Assurance
3. Work with your license provider, including:
 - A link to help you find a license provider in your area
 - Access to the Forrester Research ROI tool you can download and use—with the help of your license provider—to find your company's return on investment

If you have any questions about the terms used in this guide, please visit:

<http://www.microsoft.com/licensing/resources/glossary.mspx>

*30-day grace periods apply to the following volume license types:

- Open Value
- Open Value Companywide
- Select License
- Select License SAM
- Enterprise Agreement
- Enterprise Agreement Subscription

*90-day grace periods apply to the following volume license types:

- Open License

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Software Assurance Renewal Planning Guide

Microsoft® Software Assurance helps your business at each stage of software management. New and enhanced Software Assurance benefits for 2006 offer you 24x7 business-critical support, improved deployment and manageability, greater cost savings, and greater technology protection. Access to valuable training, deployment planning, software upgrades, and product support benefits help you realize the full value of your software investment throughout each stage of the software lifecycle. Software Assurance can help you realize ROI faster and increase the productivity of your entire organization.

Software Assurance renewal timing

- **Your Software Assurance coverage must be renewed every two or three years, depending on your type of volume license agreement. Please reference your agreement summaries for your Software Assurance agreement renewal date. When your agreement becomes due, you have until the end of the month to renew through your license provider.**
- **You then enter a grace period of 30 or 90 days (depending on the type of volume licensing agreement you hold), during which you can renew without interrupting your Software Assurance coverage.***
- **If you do not contact your license provider and renew prior to this date, your Software Assurance benefits will lapse, and you will be required to repurchase one or more new licenses, along with new Software Assurance coverage, in order to be eligible for the benefits your company now enjoys.**

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What's the value of Software Assurance.

Microsoft Software Assurance is a practical alternative to purchasing licenses as needed. It gives your company greater control over your budget and helps make sure that you enjoy the competitive advantages that the latest technology can provide. We hope you find the following chart useful in determining the value of each benefit to your particular business.

Software Assurance Benefit	Primary Result	With this benefit...	Without this benefit...	Business Value
New Version Rights for all products available with Software Assurance benefits	Increased productivity	With this benefit: • You receive access to new versions of licensed software released during the term of your agreement to deploy at your own pace.	Without this benefit: • You must pay for each upgrade you need.	• May reduce the cost of upgrades by 20% to 30%.*
Spread Payments for Software Assurance across three years (Open Value, Select, and Enterprise Agreements)	Payment flexibility	With this benefit: • Your company is allowed to spread payments annually rather than making a single upfront payment for software. (Not available with Open license agreements.)	Without this benefit: • You must pay for software up front in one payment.	• Microsoft, in effect, finances your software purchase over the term of your license.
New in 2006! Desktop Deployment Services based on Software Assurance spend on Microsoft Office applications	•Lower cost of deployment •Increased productivity	With this benefit: •You receive one-on-one consulting services that provide a customized deployment plan for your organization. •You receive help identifying valuable business levers and prescriptive guidance for desktop software deployment and maintenance.	Without this benefit: •Deployment may be more costly and take more time, which may decrease productivity.	•Immediate savings on the cost of consulting. Receive deployment plan and guidance based on Microsoft best practices for ideal deployment results.
New in 2006! Information Work Solution Services for Open Value customers with desktop coverage	•Increased productivity •Lower cost of deployment	With this benefit: •Business value discovery workshop helps customers identify and prioritize projects to increase productivity across their organization. •Architecture Design Sessions provide guidance for infrastructure required for deployment of identified solution. •Customers learn how to use what they already own and deploy it within their system architecture.	Without this benefit: •Customers won't realize the full value of their software investment. (e.g., Many Open Value customers have all the licenses necessary to deploy the highlighted solution but don't understand the architecture required to deploy them.)	Maximize ROI in your existing Microsoft Office System software investments.
Microsoft Windows® Preinstallation Environment (WinPE) for all Windows products available with Software Assurance benefits	Provides powerful, useful tools	With this benefit: • IT professionals spend less time and effort keeping desktops updated by using automation to deploy software updates.	Without this benefit: • Desktops must be updated manually. • Your workers may not always have the latest technology on their desktops.	• Reduce the time spent on Windows installation or upgrade projects by 2–5% on average.** • Improve the quality of these projects, and reduce the costs associated with these initiatives.**
New in 2006! Microsoft Windows Vista™ Enterprise, Virtual PC Express for Microsoft Windows products available with Software Assurance benefits	Significantly lower IT costs and improve IT efficiency	With this benefit: • You can build, deploy, and manage a single hard drive image, which can be rolled out companywide. • You can protect sensitive data and intellectual property in case a portable computer gets lost, stolen, or recycled. • You have Advanced Application Compatibility with Virtual PC Express which enables customers to run legacy applications on a virtual machine.	Without this benefit: • You may incur the increased costs of managing multiple hard drive images. • Your sensitive data can be exposed if hardware is lost.	• Corporate Error Reporting may help companies avoid problems by allowing internal IT to see trends before these issues result in significant downtime.** • May reduce the number of help desk calls.**
Enhanced in 2006! Training Vouchers for Microsoft desktop products available with Software Assurance benefits	Access to classroom training at no additional charge	With this benefit: • Your organization can send employees to classroom training using Microsoft Official Courseware with your local Microsoft Certified Partner for Learning Solutions.	Without this benefit: • You may not recognize how Software Assurance can help overcome training budget constraints.	• May "get more mileage out of your training budget," reduce project timelines, and lower deployment and maintenance costs related to Microsoft software implementations or upgrades.
eLearning for Microsoft Office applications available with Software Assurance benefits	•Training is easier and more cost-effective •Lower deployment and support costs	With this benefit: • Your employees can update their skills by taking interactive tutorials and using streaming audio and video software demonstrations, hands-on exercises, and animations. • By using eLearning prior to deployment of a new version or product, customers lower the cost of deploying because end users are familiar with the product before the switch, resulting in fewer support calls.	Without this benefit: • You may have to purchase Microsoft or third-party training at an additional cost. • Employees without up-to-date skills can cause a loss of productivity.	• May reduce training budgets.** • Certain travel expense costs associated with training could be eliminated.** • Improve user productivity by helping employees become more proficient and efficient in using their licensed software. • Lower deployment and support costs.

Software Assurance Benefit	Primary Result	With this benefit...	Without this benefit...	Business Value
Home Use Program for Microsoft Office products available with Software Assurance benefits	• Increased productivity • May contribute to employee satisfaction and retention	With this benefit: • Your employees may use the same Microsoft Office software at home that you have licensed for your business.	Without this benefit: • Employees must pay full price for software they use on their home PCs. • Without the right software, employees may not be able to work at home at all, and incompatibilities between different versions can cause a loss of productivity.	• Recognized costs savings in not having to purchase additional licenses. • Organizations that allow telecommuting or flextime have experienced significantly less absenteeism and better productivity when employees have the tools to work from home.**
Employee Purchase Program for Microsoft desktop products available with Software Assurance benefits	• Increased productivity • May contribute to employee satisfaction and retention	With this benefit: • Your employees receive discounts on Microsoft products, plus the flexibility of using the same software at home and at work.	Without this benefit: • Employees must pay full price for Microsoft products.	• Offering a perk such as this may result in increased employee satisfaction and reduced attrition.
Enterprise Source Licensing Program (ESLP) for Microsoft desktop products available with Software Assurance benefits. Eligible companies must have more than 1,500 licensed desktops to qualify for this benefit.	Provides powerful, useful tools	With this benefit: • Eligible customers have access to Windows source code for internal development and support, helping maintain security and protection against viruses and other computer hazards.	Without this benefit: • You do not have access to Windows source code. • You may be more vulnerable to computer viruses. • Developers can't customize or upgrade older, unsupported versions of Windows.	• May reduce the expense of purchasing new third-party software by customizing Windows to fit the needs of your business.
Enhanced for 2006! 24/7 Problem Resolution Support for Microsoft desktop and server products available with Software Assurance benefits	Increase IT productivity and ROI for support investments	With this benefit: • Phone support available 24x7 for Microsoft products and editions eligible for Software Assurance benefits. • Phone support is based on license spend. • Server customers receive unlimited Web support. • Customers with Premier support can trade Software Assurance incidents for Premier incidents.	Without this benefit: • Support may not be available when you need it. • Increased cost and time for troubleshooting IT issues.	• May save IT labor costs. (Calculate your savings by multiplying an average labor cost per server incident by the number of server incidents per year)** • May reduce downtime and associated loss of productivity.**
Corporate Error Reporting (CER) for all desktop products available with Software Assurance benefits	Provides powerful, useful tools	With this benefit: • IT professionals can easily monitor error information and map solutions to system crashes by identifying specific failures.	Without this benefit: • It may take longer to trace the causes of crashes, resulting in greater system downtime.	• CER may help companies avoid problems by allowing internal IT to see trends before these issues result in significant downtime.** • May reduce the number of help desk calls.**
Cold Backups for Disaster Recovery for Microsoft server products available with Software Assurance benefits	Provides powerful, useful tools	With this benefit: • You will be eligible for complimentary cold backup server licenses to recover data lost in a disaster.	Without this benefit: • Your stored data is vulnerable in the event of a disaster.	• Reduce the costs associated with system downtime. • Improve employee productivity. • Improve system reliability, which can increase customer satisfaction.
TechNet Plus and TechNet Managed Newsgroups for Microsoft server products available with Software Assurance benefits	IT staff has resources available to quickly address technical issues	With this benefit: • IT professionals can access TechNet Plus Subscription content—and get answers directly from the people who made the product. • Get answers quickly for less money than other support options. • Unlimited technical support in over 100 TechNet Managed Newsgroups. • Get full-version evaluation software without time limitations. • Get two complimentary support incidents. • Receive prerelease versions of Microsoft products.	Without this benefit: • Problem resolution may take longer. • Help desk calls may increase. • Support costs may increase.	• May save up to \$999 per user per year for each TechNet subscription license.** • Problem resolution may take longer. • Users have reported timeline reductions for Microsoft installs of 5% and more.** • Other Microsoft customers have experienced a 5% to 10% decrease in problem-resolution costs for Microsoft-related software problems.**
New in 2006! Windows Fundamentals for Legacy PCs for Microsoft Windows products with Software Assurance	Increase IT efficiency by managing fewer desktop operating systems	With this benefit: • You can run a Windows-based operating system on your legacy PCs if you not in a position to purchase new hardware. • Allows a smooth migration path to the latest hardware and operating systems.	Without this benefit: • You may experience a more difficult transition of legacy operating systems and Windows XP to Windows Vista.	Because you already own a license for the latest Windows operating system, when your old hardware fails, you can replace it with new hardware without having to buy another license—saving your organization money.
Enhanced in 2006! Extended Lifecycle Hotfix Support for Microsoft desktop and server products available with Software Assurance benefits	Increased levels of support	With this benefit: • Customers with a Premier or Essential Support contract can get the support they need as software transitions from Mainstream to Extended support. • Customers do not pay for extended support until hot fixes are required.	Without this benefit: • Customers without Premier or Essentials support agreements must sign up within 90 days of the end of Mainstream support and must pay an annual fee.	• Gain five years of additional hotfix support beyond the mainstream support five-year cycle. • Improve cash flow by paying for coverage only when and if you need it.

Software Assurance by license type

Software Assurance can only be purchased at the time your software license is acquired. As you can see from the charts below, certain licenses are associated with specific Software Assurance benefits. For more detail on these benefits, see the charts on the previous two pages.

Offerings Availability

Lifecycle Stage	Benefit	Office (O), Windows (W), or Server (S) availability	Open License	Select License	Open Value	Open Value Companywide	Select License SAM, EA/EA Sub
Plan	New Version Rights	O, W, S	•	•	•	•	•
	Spread Payments	O, W, S		•	•	•	•
Deploy	Desktop Deployment Planning Services	O					•
	Information Work Solution Services	O			•	•	
	Windows Preinstallation Environment	O, W, S				•	•
Use	Windows Vista Enterprise	W	•	•	•	•	•
	Windows Vista Enterprise, Virtual PC Express	W	•	•	•	•	•
	Extended Training Vouchers 2006	O, W			•	•	•
	eLearning	O, W, S	•	•	•	•	•
	Home Use Program	O	•	•	•	•	•
	Employee Purchase Program	O				•	•
Maintain	Enterprise Source Licensing Program	O, W					•
	24x7 Problem Resolution Support	O, W, S	•	•	•	•	•
	Cold Backup for Disaster Recovery	S	•	•	•	•	•
	Corporate Error Reporting	O, W				•	•
Transition	TechNet Plus and TechNet Managed Newsgroups	S		•	•	•	•
	Windows Fundamentals for Legacy PC	W					•
	Extended Hotfix Support 2006 (Desktop)	O, W					•
	Extended Hotfix Support 2006 (Server)	S	•	•	•	•	•

Eligibility for Software Assurance benefits vary by offering and region and are subject to change. The terms and conditions of your volume license agreement and the terms and conditions under which any specific Software Assurance benefits are offered will take precedence in the case of any conflict with the information provided here. For information about the terms and conditions of your volume license, contact your Microsoft account manager or reseller.

For information on benefits related to Microsoft Dynamics CRM products, please visit: www.microsoft.com/dynamics/crm/support/serviceplans.mspx

* Laura DiDio, *Microsoft Software Assurance Upgrade Program Gains Traction and User Acceptance*, The Yankee Group, November 2003.

**Julie Giera, *Calculating The Value of Software Assurance*, Forrester Research, Inc., October 2004.