

Licensing Guide

Microsoft Open Programs



Microsoft Open Programs Licensing Guide

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Microsoft Open Programs Licensing Guide

Microsoft Open Programs Overview

Small and midsize organizations looking for a cost-effective way to purchase software licenses can rely on Microsoft Open Programs, which include Open Value and Open License. The Open programs are a convenient and simple way for organizations with at least five desktop PCs to acquire the latest Microsoft technology. The Microsoft Open Programs are for corporate, academic, charity, and government organizations that want to make a minimum initial purchase of five software licenses. With features such as a customizable platform and volume discounts for minimal up-front purchases, Open programs give you value and flexibility in a convenient Microsoft Volume Licensing program.

Benefits

The Open Programs offer many benefits, including:

Licensing Simplicity. Place an order and start using licensed products immediately. The flexible pay as you go model helps eliminate the need for forecasting. After you place your order in Open License, you receive a single authorization identification number that you can reuse and share with qualified affiliates. Good for the entire two-year agreement, this identification number helps reduce procurement costs and simplifies the purchasing process.

Licensing Flexibility. Open Value gives you a single platform option, which allows you to choose components from the Windows Desktop Operating System Upgrade, Microsoft Office, and Client Access Licenses (CAL) under a single platform, rather than being required to choose between the Small Business or Desktop Professional platform.

You can also choose the latest offerings in midsize IT solutions from Microsoft with Windows Essential Business Server. If your organization requires enterprise solutions, latest version of Microsoft Office Professional Plus, Enterprise CAL, and Microsoft Desktop Optimization Pack (MDOP) are available.

Licensing Convenience. You will have fast, convenient access to Microsoft licensed products through a broad worldwide reseller channel.

Licensing Manageability. Online tracking tools make managing licenses easy and convenient. With the Volume Licensing Service Center (VLSC), you can easily view licensing information, download Microsoft software, and manage Volume Licensing benefits and subscriptions from one convenient online location.

Licensing Affordability. Stretch software procurement budgets further than retail purchase options. With a simple one-time transaction, you can pay for what you need when you need it, giving you the flexibility to manage your software needs. Greater cost savings are available in Open License for commercial and eligible government customers who require a larger initial up-front order of 500-plus points in one or more product pools (applications, systems, and/or servers).

Purchase Online Services. Open Programs customers can now purchase limited Microsoft Online Services in the same way as on-premises software. Geographic restrictions apply.

Open Value. Customers can now take advantage of improved volume pricing for 250 or more desktop PCs combined with an additional price level. (Commercial only; does not apply to Open Value for Government, Academic, or Charity.)

The Open Program Family

Microsoft recognizes that small and midsize organizations have a variety of license acquisition needs. Open Value and Open License share many of the same program features, but give you different license purchasing options. These options ensure that you are getting a program that fits your specific needs.

Microsoft Volume Licensing Options

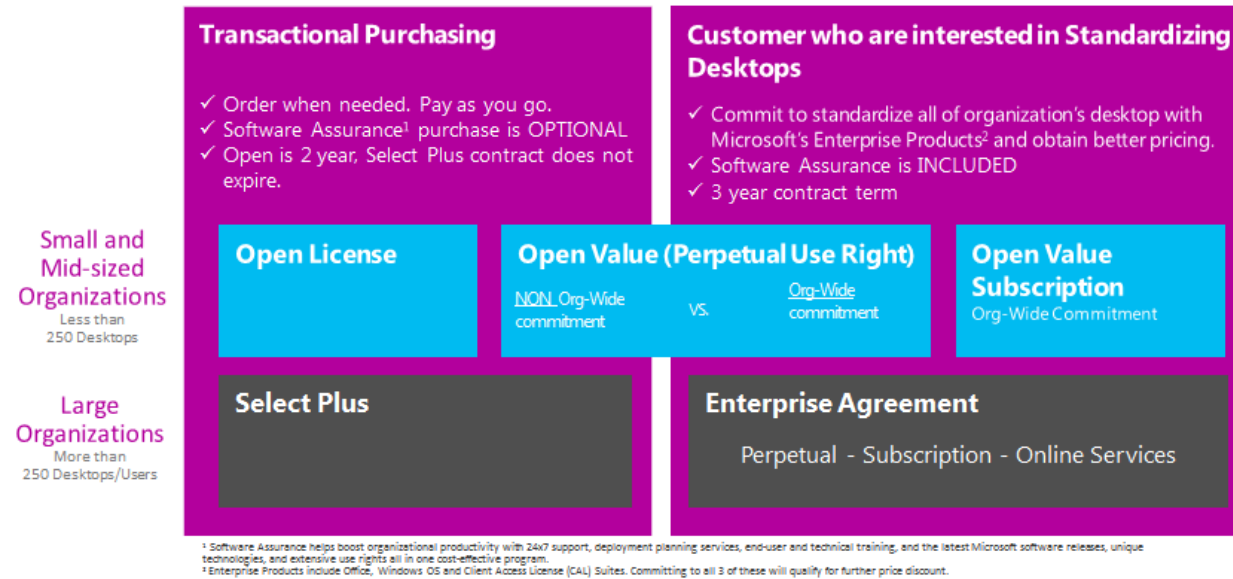


Image 1: Options for Microsoft Volume Licensing customers.

Open Value

Open Value is the recommended program if you have a small to midsize organization with five or more desktop PCs and want to simplify license management, manage software costs, and get better control over your investment. Open Value includes Software Assurance, helps you get the most out of your software spending through each phase of software management. In addition, access to valuable benefits such as training, deployment planning, software upgrades, and product support help you boost the productivity of your entire organization.

Open Value Organization-Wide Option

Open Value Organization-Wide offers commercial and government organizations additional savings opportunities to organizations that want to standardize all their desktop PCs on one or more Microsoft enterprise products. This program includes discounts on organization-wide deployment, so you get the best deal for your software license purchases.

By choosing Open Value Organization-Wide, you receive the rights to the latest Microsoft licensed products with a single platform option. With the single platform option, you can customize your desktop PC as you choose components from the Windows operating system, Microsoft Office, and CAL product pools, plus additional software products selected in your agreement that include the latest version of following platform product options:

- ▶ **Microsoft Office:** Microsoft Office Professional Plus
- ▶ **Operating Systems:** Windows Professional Plus Upgrade
- ▶ **Client Access License (CAL) Suites:** The Enterprise CAL Suite or Core CAL Suite

Open Value Subscription Option

Similar to the Organization-Wide option, the Subscription option allows you to pay a single price per desktop PC to deploy Microsoft technology as the standard across your organization. Open Value Subscription provides the lowest up-front costs of the Open Program

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options with the flexibility to reduce the total licensing costs in years when the desktop PC count declines. This option gives your organization the rights to run the software throughout your organization only during the term of the agreement with Microsoft. You also have the ability to add the single platform option to an Open Value Subscription agreement.

For Government customers: A one-year Open Value Subscription option is available for eligible government customers. This option better aligns with government procurement requirements by giving you the flexibility to choose from a one-year or three-year term. The up-to-date (UTD) discount is not available for the one-year option, and you must have purchased Open Value Subscription for a continued period of three or more years at the time of buyout.

Note: Open Value for Government is not available in all regions. Please contact your Microsoft reseller for availability in your country.

Open License

Open License is a good choice if you are a corporate, academic, charitable, or government organization that wants to pay as you go. Because you pay for licenses as you need them, you get maximum flexibility to grow with your organization's increasing and changing business needs. You must have a minimum initial purchase of five software licenses for an Open License agreement, but you can acquire additional licensed products through Open License in any quantity at any time during the two-year agreement term. Online Services such as Office 365 do not have a minimum order requirement. Software Assurance can be purchased at the time of the license purchase, but the benefits terminate with the expiration of agreement Authorization Number. In order to maximize the benefit period of Software Assurance, Open License customers can order Software Assurance as a new order (not as an additional purchase under existing Authorization Number).

Open License also offers a volume discount with an additional price break for larger purchases. This additional price point is offered to commercial organizations that purchase 500 points or more in a single product pool. Online Services purchases will count toward volume price levels.

Program Offerings for Eligible Government, Academic, and Charity Organizations

Eligible public and private organizations may receive special pricing levels.

Government

Qualified government organizations are eligible for special government pricing with Open Value or

Open License for Government. You can access government eligibility requirements at: <http://www.microsoft.com/licensing/licensing-options/for-industries.aspx#tab=1>.

Academic

Microsoft is committed to providing licensing solutions for education customers. Learn more about licensing options for education customers, including Open License for Academic at <http://www.microsoft.com/licensing/licensing-options/for-industries.aspx#tab=2>.

Charity

Eligible charity organizations may qualify for Open License for Charities pricing. You can access charity eligibility requirements at <http://www.microsoft.com/licensing/licensing-options/for-industries.aspx#tab=4>.

Open License for Charities is not available in all regions. Check with your reseller for availability in your country.

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Software Assurance

Microsoft Software Assurance for Volume Licensing helps boost productivity across your organization by enabling you to get the most out of your Microsoft software with 24x7 support, deployment planning services, end-user and technical training, and the latest software releases and unique technologies, all in one cost-effective program. Improve end-user productivity with online training and home-use licenses to help enhance skills and accelerate familiarity with Microsoft software. To help IT staff efficiently manage your Microsoft technology, Software Assurance provides new software releases as they become available, provides access to unique desktop technologies including Windows Enterprise and the Microsoft Desktop Optimization Pack, 24x7 phone and web support, technical classroom training, and deployment planning services.

For access to these benefits, purchasing an Open Value Agreement, which includes Software Assurance, is recommended. Software Assurance purchase is optional with Open License. Software Assurance benefits available¹ through Open Programs are listed below. For details on each benefit and for the latest benefit list, please visit <http://www.microsoft.com/softwareassurance>.

Benefit	Open Value Non-Organization-Wide	Open Value Organization-Wide or Open Value Subscription	Open License
New Product Versions	X	X	X
Spread Payments	X	X	
Microsoft SharePoint Server Deployment Planning Services	X	X	
Desktop Deployment Planning Services	X	X	
Microsoft Desktop Optimization Pack (MDOP) for Software Assurance	X	X	X
IT Training	X	X	
E-Learning Courses	X	X	X
Home Use Program (HUP)	X	X	X
Windows Enterprise Edition	X	X	X
24x7 Problem Resolution Support	X	X	X
TechNet Subscription through Software Assurance	X	X	
"Cold" Backups for Disaster Recovery	X	X	X
Extended Hotfix Support (Server Only) ¹	X	X	X

¹Benefits as of December 2012. See www.microsoft.com/sa for the most recent benefits list.

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License Mobility	X	X	X
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¹SERVER: 90-day enrollment not required. Annual contract fee for Microsoft Exchange Server, Microsoft Operations Manager, Microsoft Systems Management Server, Microsoft SQL Server, and Windows Server 2008 is included as part of the Software Assurance program. DESKTOP: Not eligible.

Acquiring Software Assurance

Software Assurance coverage is included for the entire term of an Open Value agreement, so if you want these benefits, we recommend this option.

You may also purchase Software Assurance with an Open License Agreement for the remaining balance of the term of the Open License Authorization number. Software Assurance must always be paid for in two-year increments, regardless of when it was purchased. In cases where time has passed after the initiation of an Open License, it may be better to acquire a new Open License authorization number to receive the most value from your Software Assurance purchase.

Software Assurance may also be purchased on its own if system or server software products are purchased through retail full-packaged product (FPP) or from an original equipment manufacturer (OEM). There is a 90-day period during which time Software Assurance may be added to these purchases

Open Programs Comparison Chart

	Open Value	Open License	OEM	FPP
Initial Purchase	Five Desktop to start contract with Organization-wide option. Five licenses for Non-organization option. One license for MBS products, MSDN, TechNet, and other products designated in the Product List.	Five licenses. Some products, including Office 365, have minimum purchase of one. To qualify for additional price discount, the initial order must have 500-point minimum within a specific product pool (applications, systems, and servers); each license carries a point value.	One license with a complete system.	One unit.
Single Agreement for Multiple Entities	Yes ¹	Yes ¹	Not applicable	Not applicable
Reordering	Yes, until three years after the agreement was entered into.	Yes, until two years after authorization number was created. Possible to place new order with a new authorization number with no time restriction.	Not applicable	Not applicable
Product Portfolio	Nearly all business-oriented products.	Nearly all business-oriented products.	Limited ²	Nearly all consumer-oriented products.
Software Assurance	Included	Optional	Add through Open Value or Open License ³	Add through Open Value or Open License ⁴
Downgrade Rights	Yes	Yes	No, with a few	No, with a few

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			exceptions.	exceptions ⁵
Subscription of on-premises software	Optional	No	No	No
Online Services ⁶	Limited availability	Limited availability	No	Limited availability

¹Limited to affiliates within the same defined region. For more details, refer to <http://www.microsoft.com/licensing/licensing-options/open-regional.aspx>.

²Products available through an OEM license are Windows Vista, Windows Server 2008, Windows Small Business Server, and several Microsoft Office products.

³Software Assurance can be added to OEM licenses for up to 90 days after licenses acquisition.

⁴Software Assurance can be added to full packaged product licenses for desktop PC operating systems and server products for up to 90 days after licenses acquisition.

⁵For example, Windows Vista can be downgraded, but the 2007 Microsoft Office system cannot.

⁶Geographic limitations exist. Offer for government, academic and charitable organizations timing may vary. Please refer to Online Service Use Right for detail.

	Open Value	Open License	OEM	FPP
Spread Payments	Yes, optional ⁹	No	No	No
Price Protection	Yes for Open Value Subscriptions. No for Open Value, but spread out payment will ensure subsequent year's order price. ¹⁰	No	No	No
Standardization Benefits	Yes, reduced pricing, price protection, and additional Software Assurance benefits.	No	No	No
Install Before You Order	No	No	No	No
Web-based License Management	Yes	Yes	No	No
Media Includes	Yes, also for new versions Default media delivery method is the free online download.	No Products are available for free online download.	Recovery media included depending on hardware vendor.	Yes
Product Activation	No	Yes	Yes ¹¹	Yes

⁹Unlike Open Value, Open Value Subscription only offers annual spread payments.

¹⁰Open Value Subscription provides price protection for all products ordered during the term of the agreement. In Open Value, additional quantity purchased will be priced at the list price, however, spread out payment option is available where all future annual payments are priced the same as the initial order.

¹¹In most cases, your hardware vendor completes Product Activation for you as part of the installation procedure.

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License Management

Managing software licenses is easier than ever with our online tools. The following are descriptions of the services we provide.

Microsoft Volume Licensing Service Center (VLSC)

The Microsoft Volume Licensing Service Center (VLSC) is where you can easily manage all your Volume Licensing agreements, download licensed products, and access product keys for your software. The site features your customized Microsoft License Statement, an easy-to-use report that provides a real-time calculation of Volume Licensing entitlements across agreements. You can also use it to quickly identify and activate Software Assurance benefits. Access the Microsoft Volume Licensing Service Center at <https://www.microsoft.com/licensing/servicecenter/home.aspx>.

Please note that a Windows Live ID is required to log into the VLSC.

Placing an Order

If you are interested in volume pricing through the Microsoft Open program, locate a reseller near you. To find a Microsoft reseller, call (800) 426-9400 in the United States or (877) 568-2495 in Canada. Outside the United States or Canada, please see <https://solutionfinder.microsoft.com/> to find a reseller.

Placing an Order for Online Services

Microsoft Hosted Online Services such as Office 365 Midsized Business will be available in Open Programs. Upon placement of order, customer and reseller will receive email information of how to activate Online Services. The Online Service Subscription term will be independent of Volume Licensing Agreement. For more detail, please refer to the [Online Services Use Rights](#).

Making Copies

After your Open Value or Open License Agreement has been initiated, you may run the exact number of copies of product for which you are licensed. Use legally acquired downloads or media kits to install licensed products across multiple workstations or servers, which may reduce the volume of media per desktop PC maintained as a result of retail software license purchases.

Additional Resources

For additional information on Open Programs: <http://www.microsoft.com/licensing/programs/open/default.aspx>

For information about Microsoft Volume Licensing Programs:

<http://www.microsoft.com/licensing/>

To learn more about Software Assurance:

<http://www.microsoft.com/softwareassurance>

Microsoft Product Use Rights:

<http://www.microsoft.com/licensing/about-licensing/product-licensing.aspx#tab=1>

For a list of available licensed products through Microsoft Volume Licensing:

<http://www.microsoftvolumelicensing.com/userights/PL.aspx>

Volume Licensing for Government organizations:

<http://www.microsoft.com/licensing/licensing-options/for-industries.aspx>

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Volume Licensing for Academic organizations:

<http://www.microsoft.com/licensing/licensing-options/for-industries.aspx#tab=2>

Volume Licensing for Charitable organizations:

<http://www.microsoft.com/licensing/licensing-options/for-industries.aspx#tab=4>

To determine the right Volume Licensing program for your organization, use Microsoft License Advisor at:

<http://mla.microsoft.com/default.aspx>

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Appendix

Determining the Licenses You Need

A software product license can be broken into five main elements: product pool, product, version, edition, and product type.

Product Pool

Microsoft software programs fall under one of the following three product pools:

Applications: Examples of Microsoft applications include the Office suites, Microsoft Visio drawing and diagramming software, and Microsoft Project. Developer tools and utilities such as Microsoft Visual Studio development system are also part of the Microsoft applications pool.

Systems: An example of Microsoft desktop PC operating system software programs is Windows Professional Upgrade.

Servers: Examples of Microsoft server software programs are Microsoft Exchange Server, Microsoft SQL Server database software, Windows Server operating system and Office 365 Subscriptions.

Product

The product software is, for example, Microsoft Office, Visual Studio, Windows, or SQL Server.

Version

Versions differentiate various releases of the product (e.g., Microsoft Office 2013 and Microsoft Office 2010).

Edition

The edition specifies the level of features and/or applications included in a product (e.g., Microsoft Office Standard 2013 includes Microsoft Word 2013, Microsoft Excel 2013 spreadsheet software, Microsoft Outlook 2013 messaging and collaboration client, and Microsoft PowerPoint 2013 presentation graphics program where Microsoft Office Professional 2013 includes Word 2013, Excel 2013, Outlook 2013 with Business Contact Manager, PowerPoint 2013, Microsoft Access 2013 database software, and Microsoft Publisher 2013.

Product Type

License: Provides the right to run a specific version of the product ordered (for example, Microsoft Office Professional 2013). The Open License and Open Value programs provide perpetual use rights. Customers with Software Assurance will have perpetual use rights to the latest product version available at the time the contract expires. Open Value Subscription provides use rights for the latest products version for the duration of the agreement's term.

Software Assurance

Software Assurance may be ordered for any underlying licensed product and provides the right to upgrade to and run the latest version of that product that Microsoft makes available during the covered period. Software Assurance is automatically included in the Open Value, Open Value Subscription. Purchase of Software Assurance is optional in the Open License program.

Note: Options and rules differ across products.

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