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The Software Licensing Advisors Guide to Microsoft Software Assurance Rights

This guide summarizes Software Assurance (SA) benefits that are described in multiple Microsoft documents, particularly the Microsoft Product list, and Microsoft Product Use Rights.

How to use this guide

Each entry's name and description is followed by an indication of the main benefit pool. Microsoft divides its products into three pools:

Systems: products associated with the Windows desktop OS, e.g., Windows 8

Applications: desktop applications, such as Office, Visio, Project, and Visual Studio

Servers: server products and Client Access Licenses for servers

SAM

Certain benefits also require Software Assurance Membership (SAM). Customers who elect to take part in this program agree to purchase Software Assurance on all products within a pool. For example, electing Software Assurance in the Applications pool means the customer will order SA with all licenses for Office, Visio, and Project that they purchase.

Lists

This information is derived from two lists of SA benefits, one in the Product List and another in the Product Use Rights. These lists cover some of the same products, while certain benefits appear only in one or the other. When they describe the same benefit they do not necessarily use the same name, so we have taken the liberty of combining information from both lists under one name in many cases. The List column indicates in which lists the information can be found.

Software Licensing Advisors Guide to Software Assurance Benefits

Name	Description	Pool	SAM?	List	Prerequisites
Enterprise Source Licensing Program	Microsoft Windows source code is available for internal development or support.	Systems	Yes	PL	Customers must have Software Assurance Membership in the Systems pool, and more than 10,000 Windows desktops with SA. The ESLP is not available in all countries.
24x7 Problem Resolution Support	Product Support incidents can be used to resolve problems related to Microsoft software that is within the Mainstream support phase (typically, the first five years after release). Web support requests are unlimited in number although responses to Web requests will be provided only during business hours to a limited number of support contacts. Phone support incidents are limited but can be initiated by any employee. After-hours phone support is limited to business-critical issues. A scale on the product list can be used to determine how critical Microsoft considers an issue to be. Customers who have a Premier Support contract can convert Software Assurance incidents to Premier Support hours, based on a local incident-to-hours calculation.	Systems, Apps, Server	No	PL	This benefit is not available to academic customers. The number of incidents depend on customer spending on SA and country, depending on currency. Spending is determined per enrollment or agreement, and may not be combined across agreements or enrollments to qualify for more incidents. To be eligible for support, a server must have SA coverage, and Web support incidents require coverage on any CALs related to the server product as well. In certain cases—purchases through the Enrollment for Application Platform or the purchase of Parallel Data Warehouse through most programs—customers can get unlimited incidents if they spend at least $250,000 a year on SA on qualifying application platform products.

Clustered HPC Applications on the Windows Desktop OS	Multiple people can access a Windows desktop OS when it is used as a Cycle Harvesting node for clustered HPC (high-performance computing) applications	Systems	No	PUR	The desktop may not be used for any other multi-user purpose, such as a general file server, Web server, mail server, etc.
Cold Disaster Recovery Rights	Customers can run two servers—the production server and a cold backup server—simultaneously during disaster recovery. The cold backup server is deemed to have a second license. + The DR server must normally be turned off except for one week every 90 days for software self-testing and patch management and during disaster recovery. + The DR server may not be in the same cluster as the production server.	Server	No	PL,PUR	Cold DR rights are available for any server covered with SA

| Companion Device Licenses | Companion devices are secondary devices, such as tablets, that are licensed to remotely access Windows 8.1 Professional or Windows 8.1 Enterprise (or earlier versions) running in virtual machines in the licensee's data center. Windows to Go may also run on a Companion device. | Systems | No | PUR | Companion Subscription Licenses (CSLs) are available only for the Primary user of a PC licensed for VDA or for Windows plus SA. CSLs cost approximately $45 to $60 a year, depending on volume discounts.
Companion devices must meet one of two criteria
+ They are incapable of running Windows 8.1 Pro
+ They are capable of (or may be) running Windows 8.1 Pro but are personally owned by the primary user.
Windows-capable devices owned by the licensing organization are NOT eligible Companion devices and if they are used to access VDI they will need the appropriate Windows licenses and SA. |
| E-learning | Customers can take hosted e-learning courses or obtain content in a format compatible with common learning management systems via download or DVD | All | No | PL, PUR | Available to all customers with SA or online services subscriptions. Customers get e-learning material for a number of users equal to the number of qualifying products covered by SA or the number of Windows Intune and Office 365 subscriptions they have.
Customers with Windows Intune or SA on Windows may use courses related to the Windows client; server licenses give rights to server courses; Application licenses and Office 365 subscriptions give access to any courses. |

Extended HotFix Support	Waives the fee for an Extended Hotfix Support Agreement, which is required for hotfix support during the Extended phase of the product support life-cycle. Fees are still required for individual hotfixes.	Systems, Apps, Server, Intune	Yes	PL	A Premier or Essentials Support agreement is also required in order to use this benefit. For support for the desktop OS or Applications, customers must have SA membership in their respective pools. For server support, SA on only one server product is sufficient. Servers covered are Exchange, SQL Server, Systems Center, and Windows Server. This benefit is not available for academic customers.
Home Use Program	Access to an inexpensive (to the user) copy of Office for use at home. A second copy of the software can also be installed on a portable computer used by the employee.	Apps	No	PL	Home Use Program licenses can be obtained for the number of licenses with SA. The licenses can be used for personal use only on a home computer and if Office is licensed through the program, a second copy can be installed on a personal or a corporate-owned portable computer. The licenses are not perpetual and are terminated when an employee leaves or is terminated, or when SA coverage expires. The products available for Home Use are related to the product with SA coverage. Home Use licenses for Office Professional Plus or Office for Mac Home and Business require that the user have a PC licensed for SA on Office Standard or Professional Plus, or SA on a Mac with Office for Mac . Home Use licenses for Visio Professional and Project Standard are available for licenses of either the Standard or Professional editions of those products respectively.

License Mobility Across Server Farms	This right waives the requirement that a server may not be moved from one physical device to another less than 90 days from the previous move.	Server	No	PUR	Servers requiring SA for licensing mobility across server farms include: + Exchange 2013 + Lync 2013 + SharePoint 2013 + Office Audit and Control Management Server 2013 + SQL Server2012 (server and core licensed) + Visual Studio Team Foundation Server 2012 + BizTalk Server 2013
License Mobility through Software Assurance	Customers can run volume-licensed products on a hoster's shared servers, waiving a requirement that customer licenses may be hosted only on dedicated servers. Servers moved to a hoster's site may not be moved back to the customer or to another hoster within less than 90 days. Some use rights change. External Connectors normally cover all instances of a product running on a host server, but in hosting environments governed by this right a connector must be assigned to each OSE that requires one. Core-licensed products can use only a single virtual CPU, although the minimum of four core licenses must still be assigned to the OSE. Consult the PUR for other restrictions. Eligible hosting environments include Microsoft Azure Platform Services and License Mobility through Software Assurance Partners.	Server	No	PL, PUR	Any server that is listed in the PUR as having License Mobility is eligible for this right if it is covered by SA. In addition, SQL Server Standard and System Center products covered by SA are eligible. The Windows Server OS is not eligible for this right. The Windows Server OS on a shared server is supplied by the hoster, through the Service Providers Licensing Agreement (SPLA). Any CALs, External Connectors, and management products that the licensee uses to manage the hosted servers must also have SA. The hosted servers must be used solely by and for the licensee. A list of qualified License Mobility through Software Assurance Partners can be found at http://www.microsoft.com/licensing/software-assurance/license-mobility.aspx.

Microsoft Desktop Optimization Pack	A bundle of utilities including: + Microsoft Application Virtualization for Windows Desktops (App-V) + Microsoft Advanced Group Policy Management (AGPM) + Microsoft Diagnostics and Recovery Toolset (DART) + Microsoft Enterprise Desktop Virtualization (MED-V) + Microsoft BitLocker® Administration and Monitoring (MBAM) + Microsoft User Experience Virtualization (UE-V)	Systems, Intune	No	PL, PUR	SA on a device with Windows OS (not embedded) DART, AGPM, and UE-V may also be used on servers if the PCs within the customer's domains are licensed for MDOP. Anyone remotely accessing a PC with MDOP must either be the primary use of the PC or be using a PC that has its own MDOP license
Microsoft Desktop Optimization Pack for Software Assurance	The same products listed for the Microsoft Desktop Optimization Pack.	Systems	No	PL, PUR	This product, released in Nov. 2012, requires additional payment. It can be purchased for a PC with SA; a Virtual Desktop Access License; or a Windows Intune subscription; or a device covered by a Companion Subscription License (CSL). If MDOP has been purchased for a PC, the primary user of a that device can use MDOP on devices covered by a CSL without additional payment.
Microsoft Dynamics AX – Localization and Updates	Microsoft provides updates to the licensed software from time to time, which include revisions to remain current with applicable government tax and regulatory requirements.	Server	No	PUR	These updates may be run on Dynamics AX servers provided that the servers and all CALs are covered by SA
New Version Rights	Upgrades to new product versions released during the SA subscription period.	All	No	PL	SA can be added to perpetual licenses at the time of license purchase and they are included in most subscription licenses

Office Multi-Language Pack	The Microsoft Office Multi-Language Pack enables deployment of a single Office image with support for multiple user interface (UI) languages.	Apps, O365	No	PL	Office System licenses with SA; Office 365 E3 or E4, Office 365 Pro Plus subscription
Planning Services	Three to 10 days of deployment planning, provided by a Microsoft partner or consultant. The service is available for desktop software, SharePoint, Lync, Exchange, private and public clouds, SQL Server, and developer tools. A deployment planning engagement does not include the actual deployment. The maximum number of days that can be earned is 75 for Office and Servers, 12 for CAL Suites.	Apps, Servers	On both Apps & Servers	PL	Software Assurance Membership is required on both Applications and Servers to receive this right. Academic agreements are not eligible for this benefit. The number of days of planning services is based on points earned through product purchases. Points gained for each product with SA range from 1 to 75. Points required per engagement day is on a sliding scale, with a minimum of 200 points to earn the first day.
Remote Desktop Services Extended Rights	Remote Desktop Server User CALs can be used with a hosted Windows Server on Windows Azure or provided by License Mobility through Software Assurance Partners	Servers	No	PUR	Customers must fill out a License Mobility Validation form for any License Mobility through Software Assurance Partner. The Windows Server OSEs must be dedicated to the customer's employees. These CALs may be used by the same user to access internal RDS servers.

Roaming Use Rights for Office, Visio, and Project	The single primary user of the Licensed Device may: + Remotely access the software running on servers (e.g., in the customer's data center) from a Qualifying Third Party Device, + Run the software in a virtual OSE on a Qualifying Third Party Device, and + install and use the software on an USB drive on a Qualifying Third Party Device.	Apps	No	PUR	Requires a PC licensed for the product, with SA coverage for the product license. Roaming rights do not cover on-premises use, when the primary user is on your or your affiliates' premises. You may not run the software in the physical OSE on the third-party device under the Roaming Use Rights. A Qualified Third-Party device is defined as "a device that is not controlled, directly or indirectly, by you or your affiliates (e.g., a third party's public kiosk)."
Roaming Use Rights for VDA and Windows with SA	The single primary user of the Licensed Device may: + remotely access the software running on servers (e.g., in the customer's data center) from a Qualifying Third Party Device, + run the software in a virtual OSE on a Qualifying Third Party Device, and + install and use the software on an USB drive on a Qualifying Third Party Device, subject to the rule for Windows to Go.	Systems	No	PUR	Requires a PC licensed for the product, with SA coverage for the product license. Roaming rights do not cover on-premises use, when the primary user is on your or your affiliates' premises. You may not run the software in the physical OSE on the third-party device under the Roaming Use Rights. A Qualified Third-Party device is defined as "a device that is not controlled, directly or indirectly, by you or your affiliates (e.g., a third party's public kiosk)."

Self-Hosted Applications	Customers can build "unified solutions" in which they use Microsoft products purchased through volume licensing to build applications and deliver a paid service to customers over a network, including the Internet. For example, they may build a Web-based e-commerce site on Windows Server and SQL Server. Their application must add "significant functionality" to the unified solution, that is, they can't sell database storage or e-mail services per se, but their own application must be the "principal service" that customers are purchasing.	Server	No	PUR	Any Microsoft products designated in the PUR as eligible for self-hosting can be used in a unified solution. Software licensed through the Services Provider License Agreement or the Independent Software Vendor Royalty License and Distribution Agreement is not eligible. The core of the unified solution must be the licensee's own intellectual property. Third-party software that the licensee uses is limited to a "non-substantive" role. All software used in the unified solution must have SA coverage. The solution many not be loaded on end-user devices, but must be delivered over a network. Microsoft may amend or even cancel these terms at any time, but it will permit ongoing use of self-hosted applications under licenses acquired before the change.
SQL Server 2012 Parallel Data Warehouse Feature Updates	Microsoft may supply customers with additional features for this product between major releases.	Server	No	PUR	The SQL Server 2012 Parallel Data Warehouse must have SA in order to receive these updates.

SQL Server passive fail-over rights	For every operating system environment running SQL 2014, the customer can run up to the same number of passive fail-over instances in a separate OSE on any server in anticipation of a fail-over event. If the server is licensed per core, the fail-over environment cannot have more cores than the licensed server and if it is licensed by virtual OSE the fail-over environment cannot have more hardware threads.	Server	No	PUR	Requires SA on the licensed server, cores, and CALs. Fail-over rights are not available to software moved to third-party servers under License Mobility through Software Assurance.
Step-up License	Step-up licenses permit upgrading from a lower edition to a higher edition, such as from Office Standard to Office Professional Plus. Step-ups are also available for Biz Talk, the Core CAL Suite, Exchange, the Professional Desktop, Project, SQL Server, System Center Visio and Windows Server.	Apps, Servers	No	PL	Requires SA on the product being upgrade. The Step-up price also includes the cost of SA on the higher edition after the upgrade.

System Center Global Service Monitor	Global Service Monitor reports on availability, performance, and function of a customer's Web applications by scheduling and executing synthetic transactions against the application. The system uses global Azure points of presence to execute the transactions. Results are stored online and should be collected by System Center Operations Manager 2012 within seven days, after which they are deleted.	Server	No	PL	May be used only with Web applications running in OSEs licensed for System Center 2012 Management Licenses.
TechNet Plus Direct	TechNet SA Subscription benefits, plus: + Download full-version and beta software for evaluation purposes. + Two technical support incidents each year and a 20% discount on additional phone support incidents	Server	No	PL	One Technet Direct Plus subscription is offered per enrollment in all agreements except Open License. Academic customers require active SA coverage on at least five server licenses; in other programs SA coverage on a single server is sufficient. Use of full-version (non-time bombed) and beta software, as well as tech support benefits, are restricted to the primary subscriber and may not be shared.
TechNet SA Subscription Services	User IDs for access to managed newsgroups and access to Microsoft Knowledge Base.	Apps, Server, Systems	Yes	PL	One user ID per server covered with SA, plus additional IDs, based on quantity of App and Windows licenses purchased with SA Membership, to a maximum of 30 IDs for 15,000 licenses and up.

Training Vouchers	Vouchers for training at a Microsoft certified Learning Partner.	Apps, Systems	Either Apps or Systems	PL	The number of Training Vouchers is based on the number of qualifying licenses the customer has and the program through which they are purchased. Academic customers are not eligible for this benefit. Customers can get vouchers for as many as 2,100 days over a three-year period, and one-third of the total is available to the customer each year in a three-year agreement.
Unlimited Virtualization for SQL Server 2012 Enterprise and Biz Talk Server 2013 Enterprise	When these products, which are offered only per processor (BizTalk) or per core (SQL) are covered with SA and the appropriate number of licenses have been applied to the physical processors or cores, the customer can run any number of instances of the server software in any number of physical and/or virtual OSEs.	Server	No	PUR	To take advantage of this right, a server running BizTalk Server must be assigned a Biztalk Server 2013 Enterprise license for every physical processor. A server running SQL Server Enterprise 2012 must have a core license assigned to each physical core on the server, with a minimum of four cores.
VDI Rights for System Center Configuration Manager	The customer can use System Center Configuration Manager to manage up to four virtual client OSEs (that is, remote virtual machines running a desktop OS) if they have the appropriate licenses with SA coverage.	Server	No	PUR	"VDI qualifying licenses" for this right are System Center Configuration Manager Client Management Licenses, Core CALs, or Enterprise CALs. Although Microsoft refers to Enterprise CALs as qualifying licenses, we believe Microsoft is referring to the Enterprise CAL Suite, not to any Enterprise CAL. The CAL suites are qualifying licenses because they each contain a System Center Configuration Manager Client Management License.

Virtualization Rights for Windows Desktops	The Product list says a device with SA on the Windows Enterprise can run up to four VMs on the local PC. The PUR adds: + Access up to four instances of Windows running in a virtual machine on servers in your data center + Run two instances of the software on the physical OSE (a right most relevant to Mac users who run a Mac OS and Windows simultaneously, where the Mac OS is also considered a qualifying OS) + Instead of Windows 8.1 Enterprise, run Windows 8.1 Pro, or any earlier version of Windows 8.1 Pro, in the virtual machine.	Systems, Intune	No	PL, PUR	Add SA to any Windows OS. In a volume licensing program this may require purchasing an upgrade and adding SA. The customer can also purchase a VDA subscription. SA can also be added to a newly purchased PC within 90 days of purchase, through Select or Open licensing if it the PC is purchased before July 1, 2014. (Microsoft announced in early 2014 that after that date customers must purchase a far more expensive($295 compared with $109) upgrade to Windows Server Enterprise The Product List's description of this right is terse, covering only the right to run up to four VMs at once on the local device. The remaining rights listed here are from the PUR's description of Windows 8.1 Enterprise rights.
Windows 8.1 Enterprise (under Virtual Desktop Access)	The PUR provides a more complete list of virtualization and Windows 8.1 Enterprise rights under a VDA subscription than the Product List does. A VDA subscription permits access to four instances of Windows running in virtual machines in the customer's data center, but not on the local device. However, if the local device has a Windows 8.1 Pro or Windows 7 Pro license (without SA), the customer can run Windows 8.1 Enterprise in up to four VMs on the local device	Systems	No	PUR	Requires a VDA subscription, and local virtualization rights require a Windows 8.1 or Windows Pro license (without SA) for the local device.

| Windows 8.1 Enterprise for Windows desktop with SA | A more advanced version of Windows desktop OS that includes features such as Direct Access (streamlined VPN), Applocker (control which apps can run on a PC), Enterprise Sideloading (avoiding a requirement to load custom Windows 8.1 apps through the Microsoft store) and Branch Cache. Note that the Windows 7 version of this product also included Bitlocker and the Multi-language Interface (MUI). Both of these features have been added to Windows 8.1 Pro, so SA is not required to get those features with that version of the OS. | Systems, Intune | No | PL, PUR | SA coverage for Windows on a device gives a permanent right to deploy Windows Enterprise, even after SA expires. (Note that the PUR description of this right also includes a description of virtualization rights, which the Product List covers separately from the Enterprise right.) |
| Windows 8.1 Enterprise Sideloading | Apps designed specifically with the Windows 8.1 programming model must normally be purchased through and downloaded from the Microsoft store. Organizations that want to load such applications directly on a Windows 8.1 device can purchase sideloading keys that enable direct install or they can obtain a sideloading key by adding SA to the Windows OS and upgrading it to Windows Enterprise edition, which includes a sideloading key. | Systems, Intune | No | PL | Domain-joined devices running Windows 8.1 Enterprise edition are feature-enabled for Windows Enterprise. Sideloading keys must be purchased separately for other devices. |

Windows Companion Subscription License	The Windows Companion Subscription License confers VDI access rights on up to four devices, including tablets, phones, and personally-owned portable PCs	Systems, Intune	No	PL	The primary user of these devices must have a PC licensed for Windows and SA. The primary user must be the primary user of all the devices licensed by the CSL assigned to the primary device. Windows PCs that are owned by the licensed affiliate organization are not eligible companion devices.
Windows Thin PC	Windows Thin PC is a smaller footprint Windows-based OS that can be used on an existing PC to connect to a centralized desktop without having to buy new thin client hardware.	Systems, Intune	No	PL, PUR	The customer must have SA coverage for the Windows desktop OS, a VDA subscription or a Windows Intune (Per Device) subscription. VDA devices must have a qualified OS installed on their device to take advantage of this benefit. The PUR specifies that the customer may run only security software, management software, terminal emulation, Remote Desktop and similar technologies, a Web browser, a media player, an instant messaging client, document viewers, the NET Framework, and a Java Virtual Machine on the device.

| Windows to Go Rights for VDA and Windows with SA | Windows to Go is a bootable Windows 8.1 image that can be stored on a USB drive. When the computer boots from that drive, the user can boot into a their corporate desktop.
The rights for this product include the rights for Roaming Use Rights for VDA and Windows with SA, Windows 8.1 Enterprise for Windows desktop with SA, and Windows 8.1 Enterprise (under Virtual Desktop Access). In addition:
+ "You may create and store an instance of the software on up to two USB drives."
+ "You may run the instance stored on the USB drive on any Windows Software Assurance or Windows VDA Licensed Device." (Verbatim from the PUR) | Systems | No | PUR | The PUR seems to clearly say that creating the bootable image and running it must occur on a PC that is itself licensed for SA on Windows or a VDA subscription. The first requirement seems logical, but the second requirement (running the software) is almost universally ignored in Microsoft literature about Windows to Go. For example, http://www.microsoft.com/en-us/windows/enterprise/products-and-technologies/devices/windowstogo.aspx says it can be run on a home computer, which unlikely to fit this restriction, since SA can only be purchased through volume licensing. The link to "compatible devices" on that Web page lists only technical specifications, without identifying any licensing constraints. |
| Windows Virtual Desktop Access (VDA) | A VDA subscription gives SA virtualization and remote access rights to a device that does not have SA, or that cannot get SA on its OS. These include PCs running Windows for which it is too late to purchase SA; PCs running a non-Windows operating system; tablets, phones, or thin clients. | Systems, Intune | No | PL | A VDA subscription does not itself require SA, but is purchased for devices that do not have SA to give them SA-type rights. |