Brief

Step-up Licenses September 2010

**Corporate and Academic ♦ Open Value License ♦ Select License ♦ Select Plus ♦**

**Enterprise Agreement ♦ Academic Select License**

# Summary

Volume Licensing customers with Software Assurance may migrate from a lower edition to a higher edition software product while maintaining their Software Assurance coverage on a given product. (See below for complete details about maintaining Software Assurance Coverage in Step-up scenarios.) The Step-up License makes it easier for you to move from a lower level edition to a higher level edition without incurring the full cost of licensing two separate editions of the software. This licensing brief presents the possible Step-ups and explains the Step-up rules.

**What’s New in this Brief**

* This brief replaces a previous version published in May 2010.
* Significant changes in this new version include:
  + Updated product name for Lync Server (formerly Office Communications Server)

**Details**

**Step-up License Availability as of May 2010\***

|  |  |
| --- | --- |
| Step Up From | Step Up To |
| BizTalk® Server Branch | BizTalk® Server Standard |
| BizTalk® Server Branch | BizTalk® Server Enterprise |
| BizTalk® Server Standard | BizTalk® Server Enterprise |
| Commerce Server Standard | Commerce Server Enterprise |
| Core CAL Suite | Enterprise CAL Suite |
| Desktop Campus w/ Core CAL | Desktop Campus w/ ECAL |
| Desktop School w/ Core CAL | Desktop School w/ ECAL |
| Dynamics CRM Workgroup Server | Dynamics CRM Professional Server |
| Dynamics CRM Professional Server | Dynamics CRM Enterprise Server |
| Exchange Server Standard | Exchange Server Enterprise |
| Internet Security & Acceleration (ISA) Standard Server | Internet Security & Acceleration (ISA) Enterprise Server |
| Lync Server Standard | Lync Server Enterprise |
| Project Standard | Project Professional |
| Office Standard | Office Professional Plus |
| Visio® Standard | Visio® Professional |
| Visio® Professional | Visio® Premium |
| Professional Desktop | Enterprise Desktop |
| SQL Server ™ Workgroup | SQL Server ™ Standard |
| SQL Server ™ Standard | SQL Server ™ Enterprise |
| System Center Configuration Manager Standard Server Management License | System Center Configuration Manager Enterprise Server Management License |
| System Center Configuration Manager Enterprise Server Management License | System Center Server Management Suite Enterprise |
| System Center Data Protection Manager Standard Server Management License | System Center Data Protection Manager Enterprise Server Management License |
| System Center Data Protection Manager Enterprise Server Management License | System Center Server Management Suite Enterprise |
| System Center Operations Manager Standard Server Management License | System Center Operations Manager Enterprise Server Management License |
| System Center Operations Manager Enterprise Server Management License | System Center Server Management Suite Enterprise |
| System Center Server Management Suite Standard | System Center Server Management Suite Enterprise |
| System Center Server Management Suite Enterprise | System Center Server Management Suite Datacenter |
| System Center Service Manager Server Management License | System Center Server Management Suite Enterprise |
| System Center Virtual Machine Manager 2008 Enterprise Server Management License | System Center Server Management Suite Enterprise |
| Visual Studio Professional with MSDN | Visual Studio Premium with MSDN |
| Visual Studio Premium with MSDN | Visual Studio Ultimate with MSDN |
| Visual Studio Test Professional with MSDN | Visual Studio Ultimate with MSDN |
| Windows® Essential Business Server CAL Suite | Windows EBS CAL Suite for Premium Users or Devices |
| Windows® Essential Business Server Standard | Windows® Essential Business Server Premium |
| Windows® Server™ Standard | Windows® Server™ Enterprise |
| Windows® Server™ Standard | Windows® Server™ Datacenter |
| Windows® Server™ Enterprise | Windows® Server™ Datacenter |
| Windows® Server™ Enterprise without Hyper-V | Windows® Server™ Datacenter without Hyper-V |
| Windows® Server™ Standard without Hyper-V | Windows® Server™ Enterprise without Hyper-V |
| Windows® Server™ Standard without Hyper-V | Windows® Server™ Datacenter without Hyper-V |
| Windows® Small Business Server CAL Suite | Windows SBS CAL Suite for Premium Users or Devices |
| Windows® Small Business Server Standard | Windows® Small Business Server Premium |

***\*****Please note: This list represents the available Volume Licensing Step-up licenses.*

*This list is subject to change.*

**Qualification to Obtain the Step-up License**

To obtain a Step-up license to a higher level edition of a product, you need:

* A lower level edition license and active Software Assurance in Open License Value, Select License, Select Plus, or Enterprise Agreement.

**Step-up License for Renewing Customers**

Enterprise Agreement, Select Plus, Select License and Open License Value customers have the option to acquire a Step-up License on or after the renewal of their previous agreements.

On renewal:

Open License Value, Select Plus and Select License customers need:

* Active Software Assurance for the lower level license originally acquired, and
* Three years remaining “SA Step-up” license for the higher level edition.

Enterprise Agreement customers need:

* Active Software Assurance for the lower level license originally acquired, and
* Added-at-signing “SA Step-up” license for the higher level edition.

For an existing agreement:

Enterprise Agreement, Select License, Select Plus, and Open License Value customers need to have:

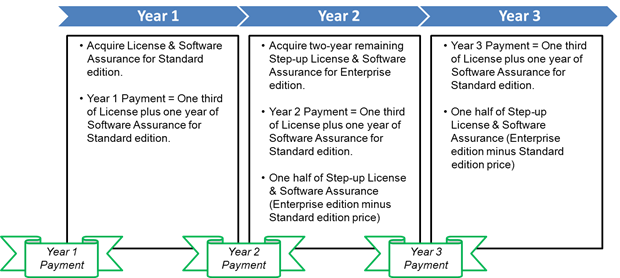
* Active Software Assurance for the lower level license they currently have, and
* One-, two-, or three-years remaining “SA Step-up” license for the higher level edition.

**Step-up License Pricing**

The Step-up License price is the difference between the License and Software Assurance (L&SA) price of the higher level and lower level editions of the software. For Select License, Select Plus, Open License Value, and Enterprise Agreement with Added-at-signing customers, the Step-up License price is spread out in equal annual payments for the remainder of the agreement term. For Enterprise Agreement customers who acquired a Step-up License after the renewal, the price is paid at the time of acquisition of the license as with all additional software license acquisitions.

**Step-up License Pricing Example**

This example shows the calculation and annual payments of the Step-up License acquired in the second year of an existing Select License, Select Plus (or Open License Value) agreement.



* The original Standard edition payments continue after the acquisition of the Step-up License until the end of the agreement term (annual payment of one third of license plus one year of Software Assurance).
* The Step-up License simply adds the price difference and spreads that price throughout the remaining years of the agreement term.
* The price of the Step-up License corresponds to the remaining years left in the agreement term.
* Note: for Select Plus the agreement is evergreen and pricing is based on the months remaining on the lower edition product you are stepping up. You pay the difference in the price of the License between the two products and the difference in the price of the monthly Software Assurance between the two products multiplied by the number of months that remain on the lower edition product.

# Frequently Asked Questions

1. **Can I acquire the Step-up License if I licensed the Standard edition software under a previous agreement and renewed Software Assurance on a current agreement?**

Yes. If you have active Software Assurance on the Standard edition software license, then you may acquire the Step-up License.

1. **Can I renew Software Assurance on the higher level edition software license acquired through the Step-up License?**

Yes. The License and Software Assurance for the higher level edition software license are both acquired under the Step-up License offering. When that Software Assurance coverage expires, you may renew coverage on the higher level edition you stepped up to.

1. **How does the Step-up License work in an Enterprise Agreement during a True-up?**

The same rules for True-up apply. On acquiring the Step-up License, your underlying Standard edition software license is considered replaced by the higher level edition software license. Eligible customers may then True-up on additional copies of the higher level edition software during the remaining term of their agreement.