

The SAM Spotlight

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Microsoft Server Licensing 101

What you need to know about licensing Microsoft server products

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Over the years, Microsoft has made frequent changes to the way server products are licensed. While many of these changes were made in response to customer feedback, keeping track of licensing options and their terms can be confusing.

This is the first of a two-part series that will help clarify licensing requirements for Microsoft's server products.

Whether you purchase these products through one of the volume licensing programs, "shrink-wrap", or OEM, the concepts hold true. They would not, however, apply to subscription programs like Microsoft's Service Provider Licensing (SPLA).

CAL Who?

Microsoft uses two distinct models for licensing server products. The first is the "server/CAL" model. The second is the "per processor" model, which will be discussed in the next issue. With the exception of SQL, each server product

is sold under one model or the other. SQL is available under both models, and factors for determining which model to use when purchasing SQL will also be discussed in the next issue.

The server/CAL model requires that you purchase one server license for each device that runs a server application or operating system. To give clients the right to access the server product, you also need to acquire a client access license, or "CAL", for each device or user that accesses the server software. Windows Server and Exchange Server are examples of products sold under this model.

CALs are still required even when a device or user does not *directly* access the server product. A common scenario that we frequently encounter with our clients is when Microsoft SQL Server supports a financial or ERP application. Although end users may not directly access the SQL Server, you still need SQL CALs, because the financial application is accessing and retrieving data from the SQL Server. Microsoft defines this as "multiplexing", or "pooling". This rule applies to all server products, not just SQL.

Decisions, Decisions...

For most products, Microsoft now offers two types of CALs: "User CALs" and "Device CALs". A User CAL is assigned to an individual and is best suited for situations where one person uses more than one device to access servers, for example, both a laptop and a Blackberry. On the other hand, a Device CAL is assigned to a specific device. This option is more appropriate when devices are shared, such as with shift workers in a hospital or call center.

The price of the two CALs is equal, so the decision as to which kind to use should be based

strictly on which makes the most sense for your environment. For example, you would not want to purchase Device CALS for a person who uses both a desktop and laptop, since you would need two of them to be in compliance when one User CAL would have sufficed.

Most of the volume license programs allow you to mix the two types of CALs. The best practice, however, is to standardize on one type and only make exceptions when warranted. This reduces the administrative burden of tracking CAL deployments.

For example, one of my clients has hundreds of desktops that are shared by employees in a call center. They also have hundreds of desktops that are individually assigned to users. Finally, they have a small group of employees that use both a laptop and a mobile device. I recommended that they standardize on Device CALs and only purchase User CALs for those with multiple devices. By contrast, if most or all of your users have one device dedicated to their sole use, I recommend standardizing on User CALs, since this offers more flexibility for future events. For example, should mobile devices eventually be issued to some of your employees who currently do not have them, you would not incur an additional CAL requirement, since the User CAL has already provided them with the licenses they need.

Be Sure to be Sure

It is important to keep in mind that once you purchase CALs they cannot be switched from one type to the other, so you need to decide carefully before buying. The only time you can switch User CALs for Device CALs (or vice versa) is when you renew their Software Assurance. Software Assurance, or "SA", is a program offered by Microsoft that provides upgrade

protection, tech support and other benefits. When ordering CALs, be sure to specify which type you want - don't leave it to your reseller to make the selection for you. Since the price is the same, your sales representative may not pay close attention to this detail. Ideally, your purchase order should specify your choice, both by name and Microsoft part number (for example, Windows Server 2003 User CAL, MS# R18-01855). When you receive the order confirmation, you should verify that it was fulfilled correctly.

When a CAL isn't a CAL

There are server products that have access right licenses that go by a name other than Client Access License. A primary example is Microsoft System Center Operations Manager (formerly known as "MOM"), which uses Operations Management Licenses, or "OMLs". The concept is basically the same; each client device requires an OML to interact with the server.

One Size does NOT Fit All

Microsoft has recently added a new concept to the CAL model. Some server products, most notably Exchange Server 2007, now have Standard CALs and Enterprise CALs. The first point to emphasize is that Enterprise CALs are obtained in *addition* to Standard CALs. In other words, every Exchange user (or device) requires an Exchange Standard CAL; if your users need the added functionality offered in an Enterprise CAL, you would need that CAL as well. The determining factor for whether or not an Enterprise CAL is needed is the way in which Exchange Server 2007 is used. With Exchange, it is primarily needed if the new Unified Messaging or Compliance functionalities are going to be used (see

www.microsoft.com/exchange.

Therefore, it is possible that one organization could run Exchange Standard and need both the Standard and Enterprise CALs while another could run Exchange Enterprise and only need the Standard CALs. These principles apply to most of Microsoft's other v2007 server products. The requirement for the Enterprise CAL will vary, depending on each organization's needs.

But Wait - There's More!

The last concern regarding the server/CAL model is the potential need for External Connector Licenses. You need to have licenses for any "External Users" who access your servers. External Users are defined as people who are not your employees, contractors, or agents of your organization. One External Connector License allows an unlimited number of External Users to access a server product running on one server. If the number of External Users can be quantified, you have the option to purchase CALs instead of an External Connector License. Windows Server and Exchange Server are examples of products that are frequently used in a manner that requires an External Connector License.

Always carefully determine your license requirements before making a purchase. This can be a complex topic; refer to Microsoft's Product User Rights on Microsoft's volume licensing website [here](#) for further guidance.

Part two of this series will discuss Microsoft's Per Processor licensing model and other factors that can affect Microsoft server licensing.

"We think in generalities, but we live in detail."

-Alfred North Whitehead

Compliance Manager

A brief overview of ManageSoft's Inventory Tool solution

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One of the most important aspects of a successful Software Asset Management program is the appropriate use of software management tools, according to the IT Infrastructure Library (ITIL). The ITIL Best Practice for Software Asset Management (SAM) goes on to list the categories of tools required to most effectively manage software assets. They recommend implementing tools that can perform asset inventory, hardware and software discovery, license and contract management, software deployment, and software usage monitoring. Having the right software management tools is an important component of effective Software Asset Management.

One such tool is Compliance Manager from ManageSoft. This Boston-based publisher provides a wide range of useful management tools, from those that ease software deployment and patch management, to others that simplify license compliance and IT asset tracking.

Compliance Manager includes numerous practical features, such as: automated hardware and software discovery (via network scans and other methods), reconciliation of installations to licenses, software usage monitoring, and others. One particularly noteworthy feature is

the Executive Dashboard that can provide a quick summary view of software license compliance.

Compliance Manager uses its own Application Recognition Library to match software executables and metadata discovered to licensable entities. ManageSoft provides integration with other applications by creating "connectors" between them and Compliance Manager. Such connected applications could include ManageSoft's Deployment Manager, Microsoft's SMS, or other financial and/or purchasing applications. Once in place, the connectors provide the data necessary for license and contract management automatically, eliminating the need for laborious manual data input.

Finally, ManageSoft provides a number of services to help customers quickly utilize the full range of Compliance Manager's features. These services include installation assistance, live training via an innovative web interface, and an assessment with recommendations to improve Software Asset Management practices.

Overall, Compliance Manager is an excellent software management tool with strong support from its publisher.

Sources:

Best Practice Guide for Software Asset Management, U.K. Office of Government Commerce, 2003

Industry News

"Server Virtualization: Figuring out costs, ROI and chargeback." Jan Stafford, SearchServerVirtualization.com [More](#)

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