Licensing Guide for Customers

License Mobility through Microsoft Software Assurance



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Chapter 1: Introduction to cloud services

This guide gives you an overview of Microsoft License Mobility through Software Assurance, which is available as a Software Assurance benefit, and outlines the detailed requirements and steps to use this benefit. License Mobility through Software Assurance gives Microsoft Volume Licensing customers the flexibility to deploy certain server applications with active Software Assurance either on premises or in the cloud.

Cloud adoption and customer needs

Today, organizations are taking advantage of the cloud for parts or their entire data center and IT management needs.

- ▶ Using shared cloud infrastructure to substitute their on-premises physical infrastructure: "Infrastructure as a Service (IaaS)"
- ▶ Using the cloud as a server platform for building a new generation of cloud applications: "Platform as a Service (PaaS)"
- Consuming entire software workloads as finished services running in the cloud: "Software as a Service (SaaS)"

IT as a Service: Concepts and benefits

Collectively, IaaS, PaaS, and SaaS models can be viewed as "'IT as a Service (ITaaS)" and point to the fundamental paradigm shift that cloud computing has on IT management. With ITaaS, your business and its IT operations can do the following:

- Increase agility. In many cases, front-line business managers and users can initiate and provision IT resources (servers, applications, storage resources, and more) without requiring IT intervention. Via simple, user–appropriate interfaces, your organization can spin up resources with basic configuration options while IT policies manage the rest in the background.
- Simplify IT use for your organization. Not only do users want more control, but today's tough business environment demands it. People in your organization must be able to consume IT services as easily as they consume personal services on the web—and cloud computing can help them do that. This self-service model does not completely cover all the requirements that a dedicated IT staff is hired to fulfill, but it can significantly decrease the burden of many rote day-to-day tasks, and allow your IT staff to devote more of its expertise to expanding your organization's IT capabilities and competitiveness.
- Help speed up key business processes. For example, if your company employs in-house developers, it can now spin up new development and test servers without being a bottleneck. You can design new environments for specific testing scenarios by the very people doing the testing, thus increasing development speed. Also, your IT department can ensure that virtual server sprawl does not become a problem simply by initiating virtualization policy using the same virtualization management tools it uses today.

It is also clear that in addition to embracing the cloud, most organizations may also want to continue to maintain on-premises infrastructure. In this hybrid IT environment, you might prefer to treat the cloud as an extension of your on-premises infrastructure, and expect the flexibility to seamlessly move your applications across both environments. Of course, you can also expect to preserve your existing investments.

In responding to these customer needs, Microsoft offers 'License Mobility through Software Assurance' which gives Microsoft Volume Licensing customers the flexibility to deploy certain server applications with active Software Assurance either on-premises or in the cloud. As a result, customers can deploy existing licenses to the cloud, and take advantage of the lowest cost infrastructure. With this Software Assurance benefit you do not need to purchase new licenses and no associated mobility fees exist.

Licensing models: Past and present

Before Microsoft License Mobility through Software Assurance, you had to license software for your on-premises use through Volume Licensing (VL) programs such as the Microsoft Enterprise Agreement (EA), Microsoft Select Plus* and Microsoft Open License. You would typically deploy such licenses on your premises, but could also deploy the licenses in service provider data centers, as long as the hardware and applications remained dedicated to your organization.

On the other hand, service providers needed to license Microsoft software under the Microsoft Services Provider License Agreement (SPLA) in order to offer "shared software services." Such services could range from IaaS to SaaS. In either case, the hardware in the

service provider data center would be used to run a service that could be consumed by multiple customers via shared hardware. Similarly, in the SaaS environment, customers would also share the application.

Figure 1 depicts these deployment options, prior to License Mobility through Software Assurance. Under these options, customers could not deploy their Volume Licensing server application software on shared hardware in service provider data centers.

*Effective July 1, 2016, in markets where the Microsoft Products and Services Agreement (MPSA) is available, Microsoft will stop accepting new orders and Software Assurance renewals through existing commercial Select Plus agreements at your next agreement anniversary date. This retirement does not apply to government and academic Select Plus agreements. More information is at <u>www.microsoft.com/selectfag</u>.

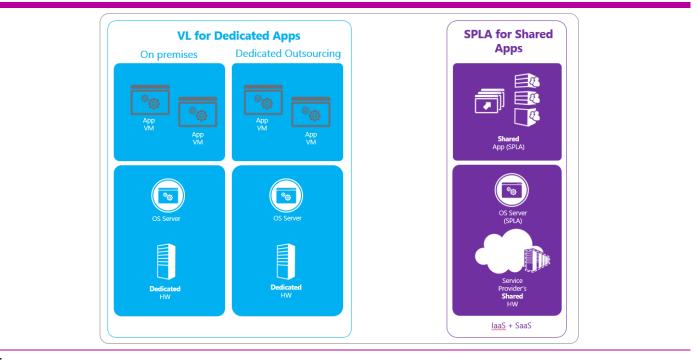


Figure 1

Figure 1 Key VL = Volume Licensing SPLA = Services Provider License Agreement App VM = Server Application Virtual Machine OS = Operating System H/W = Hardware

However, the value proposition of cloud computing is based on using economies of scale by offering shared infrastructure or shared software services. As noted above, licenses acquired under Volume Licensing programs required dedicated hardware and therefore could not be used in a shared cloud environment. As a result, you could not repurpose your existing licenses when moving applications to the cloud. Microsoft recognized this challenge and wanted to support greater licensing flexibility to help you increase the value of your Microsoft software investments.

Chapter 2: License Mobility through Software Assurance

Understanding Microsoft License Mobility through Software Assurance

To address the above mentioned needs, Microsoft introduced License Mobility through Software Assurance. With License Mobility through Software Assurance, as a Microsoft Volume Licensing customer with active Software Assurance, you can deploy certain application servers in a service provider's shared hardware infrastructure. A service provider is an organization that provides software services, such as hosting services, to other organizations. See Chapter 4 for more information on choosing a service provider or Microsoft Azure as an Authorized Mobility Partner. The application instance (virtual instance) must be dedicated for your organization's use. This would be the typical use in an IaaS cloud scenario, and is described pictorially in Figure 2 below.

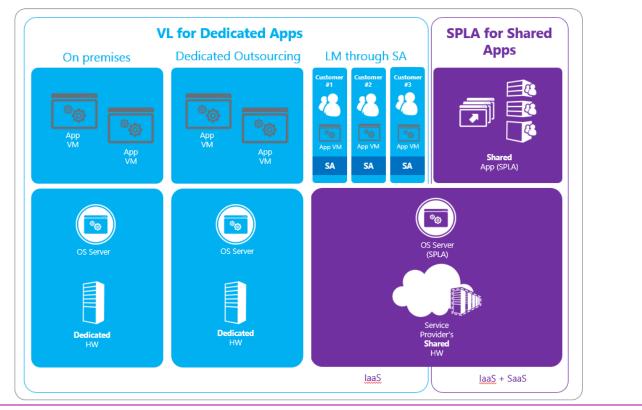


Figure 2: License Mobility through Software Assurance customer implementation (IaaS)

In the small blue boxes, Customer #1 through Customer #3 depict virtual instances dedicated to each individual customer, though running on shared hardware infrastructure. With License Mobility through Software Assurance, the application server licenses running in those virtual instances could be licensed under each individual customer's Volume Licensing agreement as long as:

- > You do not share the application with other customers, and
- The on-premises instance is no longer running.

Examples of some of the "application servers" that are eligible for License Mobility through Software Assurance are Microsoft SQL Server database software, Microsoft Lync Server, Microsoft Dynamics CRM Server, Microsoft System Center, Microsoft Exchange Server, and Microsoft SharePoint Server. However, the underlying Windows Server operating system needs to be licensed by the service provider via SPLA, and consumed by you as part of the infrastructure as a service. In other words, license mobility is not applicable to Windows Server.

The application server licenses would continue to be licensed through your Volume Licensing agreement, and all Volume Licensing license terms would apply. You would need to maintain Client Access Licenses (CALs) with active Software Assurance where applicable, and you can use such CALs to access the server instances running in the service provider's data center and on the remaining licensed on-premises instances that were not migrated or deactivated as part of the migration.

The service provider partner with whom your organization wants to deploy such licenses needs to be an authorized License Mobility through Software Assurance partner (hereafter referred to as "Authorized Mobility Partner"), Microsoft Azure may also act as an Authorized Mobility Partner. You can find detailed requirements for the partner authorization process at www.microsoft.com/licensing/software-assurance/license-mobility.aspx#tab=3.

To illustrate how this works, Figure 3 includes an example for a hypothetical customer, Contoso.

Contoso is running all of its Volume Licensing workloads on premises today. The company has been considering cloud services for future projects. Since hearing of License Mobility through Software Assurance, it determined several application workloads are available it can now run in the cloud using its current Microsoft Volume License licenses. One workload uses Exchange Server.

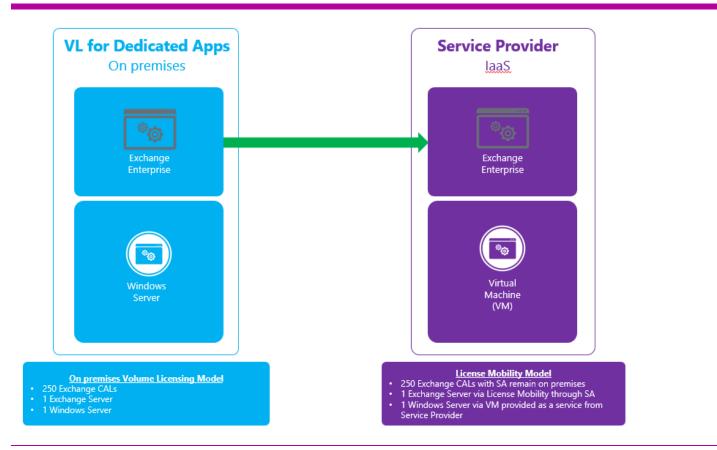


Figure 3: License Mobility through Software Assurance example customer for illustration

Contoso has identified its Authorized Mobility Partner and has acquired Windows Server virtual machines through this service provider's laaS offering. Contoso can now deploy its Exchange Server Volume License instances from its on-premises servers to the virtual machines running in their Authorized Mobility Partner's hosted environment and turn off its on-premises Exchange Server software.

Contoso can mobilize its Exchange Server with active Software Assurance licenses to its Authorized Mobility Partner's environment (the Exchange Server instance must be dedicated to Contoso) while leaving its Exchange Server CAL instances on premises and obtaining its Windows Server operating system via its Authorized Mobility Partner's infrastructure.

Benefits

In summary, the benefits of License Mobility through Software Assurance include the following:

Flexibility:

- Increase flexibility to deploy workloads in a variety of cloud environments
- Provide enhanced security and flexibility over nondedicated instances
- Move application server workloads to an Authorized Mobility Partner's laaS offering without additional licensing. Microsoft Azure may also act as an Authorized Mobility Partner

Cost effectiveness:

- Take advantage of existing licensing investments when deploying to the cloud
- Capitalize on a lower-cost service provider infrastructure platform
- Enjoy further benefits of Software Assurance
- Get the advantages of the Authorized Mobility Partner's value added services

Manageability:

- Use existing license agreements to adopt the cloud
- Avoid additional licensing cost for hosted application server workloads

Chapter 3: Eligibility

License eligibility

If you are a Microsoft Volume Licensing customer with eligible application server licenses that are covered by active Software Assurance, you can elect to use License Mobility through Software Assurance. Eligible Volume Licensing programs include the Enterprise Agreement, Microsoft Enterprise Subscription Agreement (EAS), and Microsoft Open Value Agreement, where Software Assurance is included, and other Volume Licensing programs where Software Assurance is an option, such as the Microsoft Open License Agreement or the Select Plus* Agreement. Where applicable, you need to maintain appropriate CALs with Software Assurance in your Volume Licensing agreement to access the application servers. More information is available on the Microsoft Volume Licensing Software Assurance page at www.microsoft.com/licensing/software-assurance/license-mobility.aspx.

*Effective July 1, 2016, in markets where the MPSA is available, Microsoft will stop accepting new orders and Software Assurance renewals through existing commercial Select Plus agreements at your next agreement anniversary date. This retirement does not apply to government and academic Select Plus agreements. More information is at www.microsoft.com/selectfaq.

Eligible application server licenses with Software Assurance are granted License Mobility through Software Assurance rights through the <u>Product Terms</u>. During the verification process Microsoft confirms whether you have licenses that meet the eligibility criteria for License Mobility through Software Assurance. Those criteria are described in the Product Terms, where you can find information about permitted use and requirements in the Software Assurance appendix.

The following are key requirements for using License Mobility through Software Assurance with your eligible Volume Licensing products.

- Software licenses must be purchased with the Software Assurance benefit as part of your license agreement to be eligible for License Mobility.
- License Mobility through Software Assurance: only applies to eligible products as per the Product Terms.
- All products that are currently eligible for "License Mobility within Server Farms" and covered by Software Assurance are eligible for "License Mobility through Software Assurance."
- Other products can also be granted License Mobility through Software Assurance benefits as identified in Software Assurance Benefit Appendix of the Product Terms. Dynamics ERP products, while they are not available through Microsoft Volume Licensing and are not licensed online, have mobility rules that allow for similar use as License Mobility through Software Assurance when deploying in shared environments.
- Windows Server, the Windows client operating system, and desktop application products are NOT included in License Mobility through Software Assurance.

Active Software Assurance coverage is required on all eligible licenses including software used to run and access your licensed software, such as server licenses, processors licenses, CALs, , and server management licenses require active Software Assurance coverage.

Rights to run licensed software and manage instances on shared third-party servers expire with the expiration of the Software Assurance coverage on those licenses.

- Customers can exercise License Mobility through Software Assurance rights only with Authorized Mobility Partners. A list of Authorized Mobility Partners is available at <u>www.microsoft.com/licensing/software-assurance/license-mobility.asp</u>. This list is updated monthly as additional partners become authorized to participate. Microsoft Azure is also considered an Authorized Mobility Partner. If your desired partner is not on the list, please refer them to the Steps for Partners process at <u>www.microsoft.com/licensing/software-assurance/license-mobility.aspx</u>.
- You need to contain instance(s) of software within a single cloud server farm at Microsoft Azure or the Authorized Mobility Partner's data center. Authorized Mobility Partners that are running your eligible licensed instances of software via License Mobility through Software Assurance can reassign your licenses within a single cloud server farm. A server farm is a single data center or two data centers each physically located either in time zones not more than four hours apart, or within the EU or EFTA as defined in the Product Terms.
- You need to maintain eligible licenses on Microsoft Azure or the Authorized Mobility Partner's shared servers for a minimum period of 90 days. After the 90-day period, you can move the licensed software back to your premise or to another Authorized Mobility Partner's server farm.
- You need to complete the License Mobility verification process. Find more detailed information of the verification process in Chapter 4.

Chapter 4: Deployment and license verification

Recognizing that you and Authorized Mobility Partners want to maintain license compliance, Microsoft will have implemented a customer license verification process to be eligible for License Mobility.

As a customer using License Mobility through Software Assurance, you must complete a license verification process. Microsoft will then verify that you have eligible licenses with active Software Assurance. Microsoft also confirms to you and to the Authorized Mobility Partner that you have completed this verification process. You can deploy your application server software prior to completing the verification process. You are responsible for managing true-ups and renewals as required under your Volume Licensing agreement. In addition, you must submit a new verification form when you renew your agreement and when you deploy any previously unverified products.

How to verify your licenses

You will need to determine the eligible licenses on your Volume Licensing agreement, work with an Authorized Mobility Partner, and send a verification form to Microsoft covering details of the licenses to be used in the cloud.

1. Determine eligible licenses

Typically, the IT or procurement department in your organization can access the Microsoft licensing agreement details. The Microsoft Volume Licensing Service Center (VLSC) tool gives you a view of your Microsoft License Statement (MLS). You can log on to VLSC to view current license entitlement on the Enrollment Details page, which displays the estimated license entitlement. See Figure 4.

					🔞 R	elationship Summary FA
	Enrollment ID : 1234567 Parent Program : Select 6 987654321 MBSA : N/A echnet Administration : <u>click here</u> e MSDN Subscriptions : <u>click here</u>	Start I End I	Status : Active Start Date : 2009-01-28 End Date : 2012-01-31 Renewal Date : 2015-01-31		Organization : Fabrikam, Inc. Location : Your Town, USA	
		Offerings	Contacts	Licenses	Product Keys	Order Confirmations
			rsion for this Enrollm		/	pad all license informatio
License Pool 🔺			Version Effect		Downie Unresolved Quartity	Active SA Quantity
License Pool A Applications					/	
	Product Family >		Version Effect	ctive Quantity	Unresolved Quantity	Active SA Quantity
Applications	Product Family ► Expression Studio		Version Effect	ctive Quantity 3	Unresolved Quartity	Active SA Quantity
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Applications Applications Applications Applications Applications Applications Servers	Product Family Expression Studio Expression Studio Lync MapPoint MapPoint OneNote Project BizTalk Server - Developer		Version Effect 2.0 2010 2011 2011 2010 2010 2010 2010 2010 2010 2010 2010	ctive Quantity 3 374 8 1 3 1 3 3	Unresolved Que dity 0 22 0 102 0 0 0	Active SA Quantity 0 374 30 0 104 0 3

Figure 4: Volume Licensing Service Center Enrollment Details.

2. Choose an authorized partner

You need to choose a service provider who is an Authorized Mobility Partner as listed at the Microsoft website at <u>www.microsoft.com/licensing/software-assurance/license-mobility.aspx#tab=2</u>. Partners need to meet certain criteria to be authorized, and you can find details for this at the Microsoft website at <u>www.microsoft.com/licensing/software-assurance/license-mobility.aspx#tab=3</u>.

3. Submit a License Mobility Verification Form to Microsoft

After you select an Authorized Mobility Partner, you need to complete and submit a license verification form available at <u>www.microsoftvolumelicensing.com/DocumentSearch.aspx</u>. This form requires you to include basic details about the licenses from your Volume Licensing agreement, which is used for License Mobility through Software Assurance, and is required by Microsoft to verify eligibility for this benefit. See Figure 5.

Volume License Agreement Programs	Agreement	Enrollment	Software Assurance	
(Select program name)	Number*	Number(s)*	Expiration Date(s)*	
<choose agreement=""></choose>				
Open License Programs	Authorization	License	Software Assurance	
(complete for Open License programs only)	Number*	Number(s)*	Expiration Date(s)*	
<choose agreement=""></choose>				
Open Value Programs	Agreement	Software Assurance		
(complete for Open Value programs only)	Number*	Expiration Date(s)*		
<choose agreement=""></choose>				
Select Plus Program	Public Customer	Software Ass		
(complete for Select Plus program only)	Number*	Expiration Da		
<choose agreement=""></choose>				

Figure 5: License Mobility Verification Form, agreement information

The form lists products that are eligible for license mobility, and you indicate which you are deploying with your Authorized Mobility Partner. Once you submit the form to Microsoft through your channel partner, you can deploy the licenses with the Authorized Mobility Partner, without waiting for Microsoft to finish the verification process. See Figure 6.

Product	Edition	Selected for Verification	Quantity to Deploy	Verified (MSFT Only)					
Exchange Server									
ExchangeServer	Standard			Yes No					
	Enterprise			Yes No					
ExchangeServer Standard for Small Business				Yes No					
Lync Server	1								
Lync Server	Standard			Yes No					
	Enterprise			Yes No					
Microsoft Dynamics	1								
Microsoft Dynamics CRM Server	1			Yes No					
SharePoint Server	1								
SharePoint Server	Standard			Yes No					
	Enterprise			Yes No					
SharePoint Server for Internet Sites	Standard		1.00	Yes No					
	Enterprise		1000	Yes No					
SQL Server	1								
SQL Server	Standard			Yes No					
(Per Processor)	Enterprise		1000	Yes No					
	Datacenter		1 3.2	Yes No					
SQL Server (Server/CAL)	Standard			Yes No					
	Enterprise			Yes No					
	Datacenter			Yes No					

Figure 6: License Verification Form, sample of eligible products list

You are expected to understand the terms for License Mobility through Software Assurance and, therefore, to use licenses in compliance with the terms. However, if the verification fails with Microsoft, you must follow the steps outlined below.

4. Microsoft verification

Microsoft verifies that the licenses you move to the cloud are eligible per the terms of License Mobility through Software Assurance and informs you and the Authorized Mobility Partner of this status. If the verification fails for whatever reason, you will be notified of the reason on the returned verification form. If your verification is rejected, you can choose to take any one of the following steps:

- 1. Acquire appropriate licenses as required for License Mobility through Software Assurance via Volume Licensing and resubmit the form.
- 2. Acquire use rights to that software from the Authorized Mobility Partner (who would in turn use the SPLA program).
- 3. Discontinue use of the licenses in the Authorized Mobility Partner's environment.

Deployment

You must assign licenses to your Authorized Mobility Partner's data center for a minimum of 90 days, after which you can move your licensed software back to your local servers or to another Authorized Mobility Partner's shared servers. You must run instances running under a particular license in a single server farm as defined in the Product Terms. You can move them to another server farm, but not on a short-term basis (90 days or less). See Figure 7.

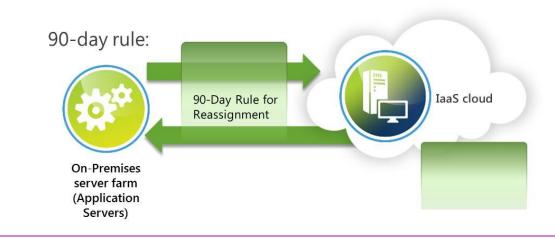


Figure 7: 90 day deployment rule

Resubmitting the verification form

You will be required to resubmit the license verification form to Microsoft in the following situations:

- 1. At renewal of Software Assurance on the Volume Licensing agreement: As per the terms of License Mobility through Software Assurance, you must maintain Software Assurance on your licenses deployed in the cloud. At the renewal of an annuity agreement, you must resubmit the license verification form to Microsoft.
- 2. On adding new products to the cloud deployment: After having deployed and verified a set of products upfront, if you choose to also deploy other products, you must submit a new verification form.
- 3. On changing partner: If you change the Authorized Mobility Partner with whom you are deploying the licenses, you must submit a new verification form.

Chapter 5: Microsoft Software Assurance

About Microsoft Software Assurance

Microsoft Software Assurance is a comprehensive maintenance offering. It offers a broad range of benefits that help you get the most out of your software license purchases. These benefits are available throughout the software management life cycle, so you can access them when you need them.

All Enterprise Agreements, Enterprise Subscription Agreements, and Open Value Agreements (including Open Value Subscription) for commercial and government customers include Software Assurance. Microsoft Select Plus Agreements* and Open License Agreements for commercial and government customers can choose to include Software Assurance. Software Assurance is for on-premises software to help you boost productivity across your organization with new software versions, deployment planning, 24x7 phone and web support, training and unique technologies such as Windows 7 Enterprise Edition and the Microsoft Desktop Optimization Pack (MDOP).

Software Assurance benefits contribute to the return on your technology investment by helping you with budget predictability and improved productivity. And Software Assurance can help you lower the operating expenses for employee development, deployment, and support costs. This program also offers other advantages, depending on how you activate and use the benefits.

While Software Assurance benefits are designed for on-premises software licenses, you can use the Software Assurance Deployment Planning Services to develop plans to move users to online services, in addition to planning for on-premises deployments.

For information about Software Assurance benefits, please visit the Software Assurance website at www.microsoft.com/licensing/software-assurance/default.aspx.

*Effective July 1, 2016, in markets where the MPSA is available, Microsoft will stop accepting new orders and Software Assurance renewals through existing commercial Select Plus agreements at your next agreement anniversary date. This retirement does not apply to government and academic Select Plus agreements. More information is at www.microsoft.com/selectfaq.

Software Assurance renewal

To ensure the continued benefits provided by Software Assurance, you must renew all Software Assurance covered products within 30 days of the enrollment expiration.

Chapter 6: Next steps and resources

License Mobility through Software Assurance gives you the flexibility to adopt the cloud on your own terms while preserving existing licensing investments. The verification process was designed with you and your partners in mind to support compliance to the offering terms. As your organization identifies the best way to adopt the cloud, consider taking advantage of this new Software Assurance benefit.

Contact an Authorized Mobility Partner to get started. You can find the list of Authorized Mobility Partners at <u>https://www.microsoft.com/licensing/software-assurance/license-mobility.aspx</u>. The list is updated monthly.

Additional resources and tools

Microsoft provides a number of tools and resources to help partners keep up to date on product licensing. The Microsoft Licensing website (<u>www.microsoft.com/licensing</u>) has licensing terms, conditions, and supplemental information relevant to using products licensed through Microsoft Volume Licensing programs, and is where you can find the following:

- Microsoft Software Assurance Benefits. You can find an overview of all Software Assurance benefits at www.microsoft.com/licensing/software-assurance/default.aspx.
- Microsoft Terms. Replacing both the Product Use Rights and the Product List, Product Terms—together with the program agreement—contains all the terms and conditions for how you purchase licenses for software and online services through Microsoft Volume Licensing programs, with the exception of the Microsoft Online Subscription and Cloud Solution Provider programs. Available at https://www.microsoft.com/en-us/licensing/product-licensing/products.aspx#PT.
- Volume Licensing Support Documents. Offers additional information, such as government qualifiers, qualified educational user definitions, language options, and currency tables. Available at <u>www.microsoftvolumelicensing.com/DocumentSearch.aspx</u>.
- Microsoft Technical Limitations. Summarizes technical limitations included in some of our products, such as how many processors can use a specific server product at one time.
- Worldwide Contact Information. Helps customers get answers to product licensing questions.

In addition, Microsoft Volume Licensing briefs provide information on specific licensing topics, such as Multi-Lingual User Interface (MUI) Language Packs for Windows, Downgrade Rights Chart, and Work at Home (WAH) Licenses.

New topics are added regularly, and each document is available for download. You can find the licensing briefs at www.microsoft.com/licensing/about-licensing/volume-licensing-briefs.aspx.

Appendix 1: Glossary

Client Access License (CAL)

A proprietary software license to allow clients to connect to a company's server software and use the software's services.

Cloud Computing

Per Gartner, cloud computing is "a style of computing where scalable and elastic IT-related capabilities are provided 'as a service' to customers using Internet technologies."

Instance

Instance means an image of software that is created by executing the software's setup or install procedure. An instance of software can also be created by duplicating an existing instance. References to software include "instances" of the software.

Licensed Server

Licensed Server means the single server (see "Server") to which a license is assigned. For purposes of this definition, a hardware partition or blade is considered to be a separate server.

On-premises software

Software installed and run on computers on the premises of the person or organization using the software, rather than at a remote data center via cloud computing.

Server

A physical hardware system capable of running server software.

Server farm

A server farm consists of up to two data centers, each physically located either in a time zone that is within four hours of the local time zone of the other [Coordinated Universal Time (UTC) and not Daylight Standard Time (DST)], and/or within the European Union (EU) and/or European Free Trade Association (EFTA).

Service Provider

Service providers offer a variety of software services to customers such as access to third-party software, business transaction services, and line-of-business (LOB) applications. Service providers offer customers direct or indirect access to Microsoft server licensed products ("products") or software services that interact with Microsoft products.

Services Provider License Agreement (SPLA)

With the Services Provider License Agreement, service providers and independent software vendors (ISVs) can license Microsoft products on a monthly basis, during a three-year agreement term, to host software services and applications to their customers.

Software Services

Software services are services that a service provider delivers to its customers that make products available and that display, run, access, or otherwise interact with Microsoft products.

User

The single person to whom a license is assigned.

Virtual machine / virtual processor

A processor in a virtual (or otherwise emulated) hardware system. Solely for licensing purposes, a virtual processor is considered to have the same number of threads and cores as each physical processor on the underlying physical hardware system.

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