eAgreements User Guide: Open Value Programs



MICROSOFT® VOLUME LICENSING
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About eAgreements

Microsoft eAgreements is an online tool for Microsoft Partners that automates the electronic creation, assembly, signature, and activation of Volume Licensing agreements. Microsoft eAgreements helps you reduce data-input errors and agreement cycle times so you have more time to spend on other sales activities.



About this User Guide

This eAgreements User Guide demonstrates the creation, assembly, signature, and execution of Open Value (OV) and Open Value Subscription (OVS) agreements.

For information on using eAgreements with other volume licensing programs, see the other guide titled *eAgreements User Guide: Open Value Programs*.

Note: There may be some minor differences between the live eAgreements tool and the screenshots in this guide.

The eAgreements site

The eAgreements tool is online at https://eagreements.microsoft.com/AgreementWeb/Login.aspx

Sign in and create an Open Value Agreement

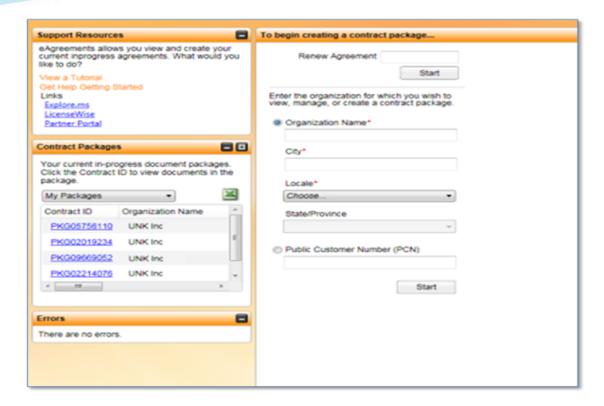
Microsoft Partners can sign into the eAgreements application using their **Partner Domain Account, Microsoft Account** or **Windows Live ID**, depending on their role.

Sign in at: https://eagreements.microsoft.com/AgreementWeb/Login.aspx

- 1. After you sign in, open the **Organization Search** page and create a new contract package (Open Value Agreement), so you can begin using eAgreements.
- 2. In the section labeled **To begin creating a contract package**, do one of the following:
 - Enter the **Organization Name** and **City** in their respective fields. Select the **Country** from the **Country** drop-down list box. Enter the **State** or **Province** in the **State/Province** field.

OR

• Enter enter the **Public Customer Number (PCN)** in the **Public Customer Number (PCN)** field.

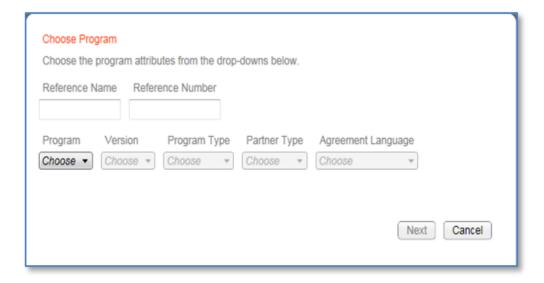


- 3. Select the desired organization from the list.
- 4. Click **Add Program** to begin creating a new agreement.

Choose Program Attributes

The Choose Program page opens.

1. Enter a **Reference Name** and **Reference Number** of your choice.



Note: The **Reference Name** and **Reference Number** are identifiers used as eAgreements tracking reference numbers for the Partner. Partners can use these numbers to search for an Agreement Package within eAgreements.

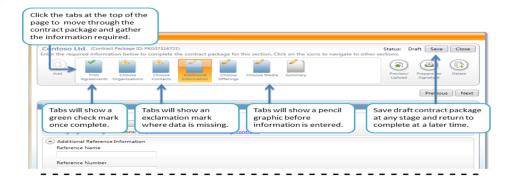
- 2. Choose **Select** from the **Program** drop-down list box.
- 3. Choose the required **Version** of the agreement program from the **Version** drop-down list box.
- 4. Select the correct **Program Type** from the **Program Type** drop-down list box.

Selecting **Program Type** automatically populates the **Partner Type** and **Agreement Language** fields. Countries with more than one partner type for a program will have to choose these fields. To create a new contract with the chosen company, create a new contract is selected here.

- 5. Verify the **Partner Type**.
- 6. Select the correct language for the agreement from the **Agreement Language** dropdown list box.
- 7. Click **Next**.

Creating an Agreement (Contract Package)

After you select a new company and decide on the type of agreement to create, you must complete the **Contract Package**. Click the icons at the top of the *Contact Package* page to move through the tabs to gather the information required to complete a contract package. Partner information is pre-populated.



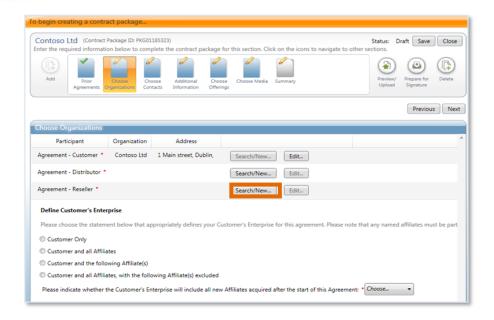
Prior Agreements

1. Within the Prior Agreements tab select **Yes** or **No** to confirm whether the new agreement you are creating is part of an SA Renewal.

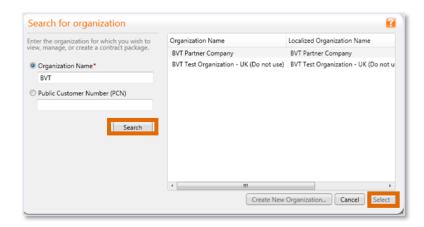


Choose Organizations

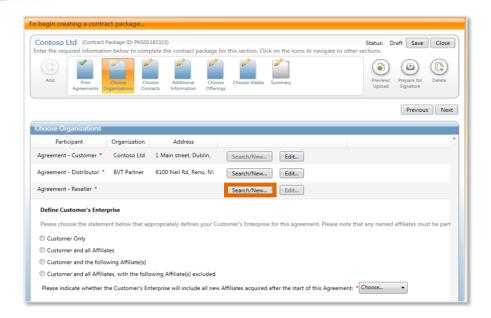
- 1. Click the **Choose Organizations** tab.
- 2. Click **Search/New** to add details of the Distributor associated to contract package.



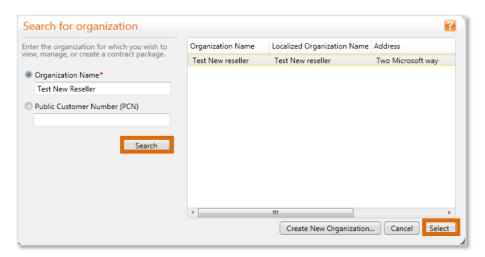
- 3. Enter the Distributor's Organization Name or Public Customer Number.
- 4. Click **Search**.
- 5. Click on the required organization and click Select.



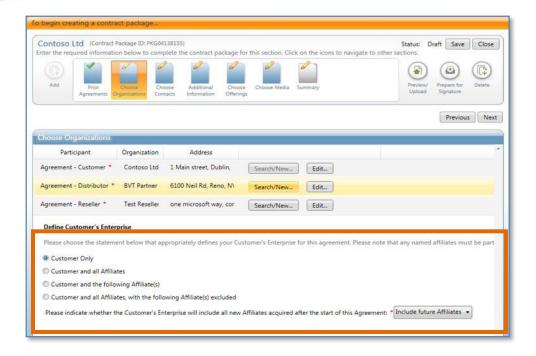
6. Click **Search/New** to add details of the Reseller associated to contract package.



- 7. Enter the Reseller's **Organization Name** or **Public Customer Number**.
- 8. Click Search.
- 9. Click on the required organization and click Select.



10. Choose from the options to define the customer's enterprise and affiliates.



Note: An affiliate is a company that is more than 50% owned by the parent company. Options available here include selecting –

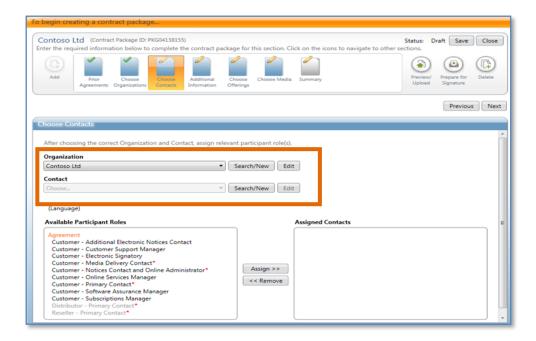
- The customer organization only.
- The customer organization and all affiliate organizations
- The customer organization and the following affiliates in which case the contract package creator will select each affiliate, which **should be** included.
- The customer organization and all affiliates with the following affiliates excluded in which case the contract package creator will select each affiliate, which **should not be** included.

Finally, the contract package creator should determine whether the customer's organization would include all new Affiliates acquired after the start of the Agreement, which is being created.

Choose Contacts

- 1. To assign Participant Roles as Agreement Contacts click the **Choose Contacts** tab.
- 2. Select the Customer organization from the **Organization** drop-down list box to view the available contacts for that organization. Use the **Contact** drop-down list box to choose the appropriate contacts within the organization.

Note: Contacts can be added at this time by clicking **Search/New** next to the **Contact** dropdown list box and details for an existing contact can be updated by clicking **Edit**.



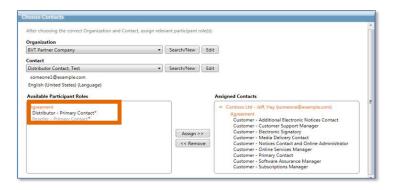
The red asterisks indicate required contact roles assigned to a contract in the **Available Participant Roles** field.

3. Select any or all of the items in the **Available Participant Roles** box.

Note: Press and hold the <Ctrl> key to choose multiple Participant Roles or press and hold the <Shift> key to choose a range of Participant Roles.

When the Customer Organization is selected in the **Organization** drop-down list, the **Reseller Primary Contact** and **Distributor Primary Contact** roles are grayed out and unavailable for attachment to the Customer contact.

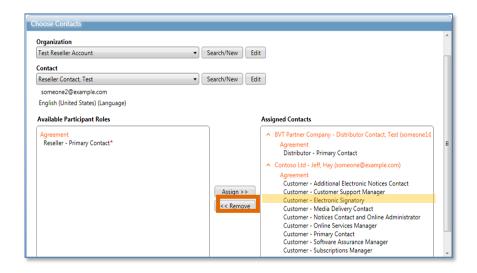
- 4. Click **Assign** to move Participant Roles to the **Assigned Contacts** field. This action assigns the participant to those roles in the contract. Repeat these two steps until all required contacts/roles are assigned.
- 5. Select the Distributor **Organization** and **Contact** from the drop down lists.



- 6. Choose the roles associated with the Distributor contact from the **Available Participant Roles** field and click **Assign**.
- 7. Select the Reseller **Organization** and **Contact** from the drop down lists.
- 8. Choose the roles associated with the Reseller contact from the **Available Participant Roles** field and click **Assign**.

Before moving on to complete the **Additional Information** section, verify that all of the roles are assigned. Also, verify that the **Contact** field shows the contact desired. If any of the roles need to be removed from assignment or another contact needs to be chosen, it should be done at this point in the process to avoid having to return later. It is especially important to select an electronic signatory if you intend to have the Contract Package signed electronically.

- 1. Select the **role** to remove.
- 2. Click **Remove**.



Additional Information

The **Additional Information** tab allows you to add any miscellaneous information require to the Contract Package. The example below is the Additional Information page a user would see during the creation of Open Value Agreements.

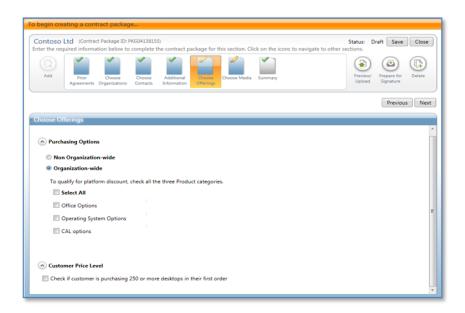
- 1. Select the **Additional Information** tab.
- Choose Language Option (applicable to Customers in EMEA only) and enter Additional Reference Information as needed.

Choose Offerings

The Choose Offerings tab allows you to select from various purchasing options and determine the Customer price level.

- 1. Select the **Choose Offerings** tab.
- 2. Choose from the **Purchasing Options** and **Customer Price Level** options as required.

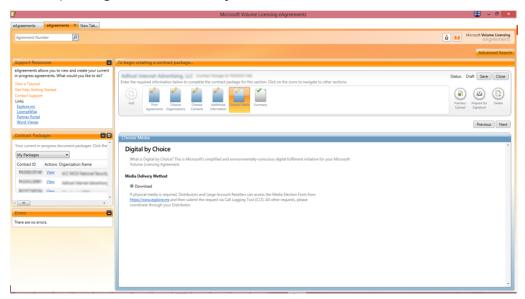
Note: The purchasing options and customer price level options may differ slightly from the screen below depending on whether you are creating a contract package for the Open Value or Open Value Subscription program.



Choose Media

What is Digital by Choice? This is Microsoft's simplified and environmentally conscious digital fulfilment initiative for your Microsoft Volume Licensing Agreement. This initiative allows your organization to choose the best method to receive software. To simplify the experience and reduce the environmental impact of production and shipment of media, choose the **Digital by Choice** download method.

On the navigation menu, click **Choose Media**. The **Download** option is preselected. No other action is required; go to the **Summary** section.

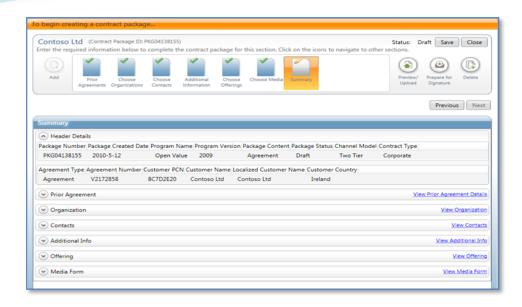


Summary

The **Summary** section gives the agreement creator a page on which to view the agreement content.

1. Select the **Summary** tab.

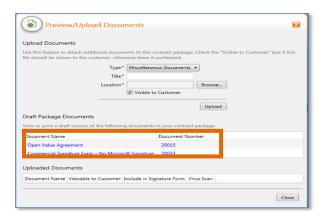
View each area within the summary by clicking on the headers on the left. In addition, an area can be revisited by clicking the links on the right.



Preview/Upload and Preparing for Signature

Before submitting the Contract Package for signature, contract package documents can be reviewed and additional miscellaneous documents can be attached if required.

- 1. Click **Preview/Upload**.
- 2. Click on the document name to review/print each draft document in .pdf format.



Note: Contracts printed from preview/upload at this stage are not final. Physical versions should not be sent for customer signature.

3. To attach any additional documents enter a title for the document.

- 4. Click **Browse** to locate the document for attaching.
- 5. Choose whether the document should be visible to the customer when signing.

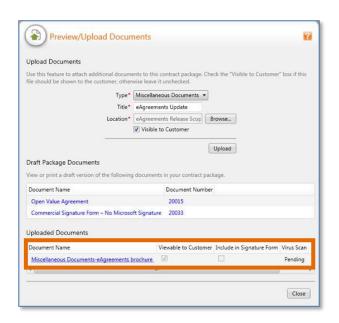
In the case of Open Value or Open Value Subscription, Partners or Resellers may choose to attach additional documentation (e.g. sales/marketing information) that they would like to send to the customer for informational purposes, which will not be taken into account by the processing team at the Regional Operations Center (ROC) when processing the agreement. Additional forms should not be included.

The Visible to Customer check box determines whether a miscellaneous document will be visible to the Customer when signing. If there are reasons that the customer should not see the document, DO NOT select this choice. The option chosen for each document listed in the Uploaded Documents section.

6. Click **Upload**.

Repeat as necessary until all miscellaneous documents required are attached. Each document will appear in the **Uploaded Documents** section.

7. Click **Close** once complete.



Note: It is also possible to remove any *Uploaded Documents* that were uploaded in error. To do this select the document and click the **Remove** button.

Prepare for Signature

There are two submission for signature options. You can submit for either electronic or physical signature. This section explains both.

Electronic Signature

1. Click Prepare for Signature

The prepare to send dialog box opens

- 2. Verify the **Electronic Signatory**.
- 3. Enter any **CC** or **BCC** e-mail addresses.
- 4. Click **Send**.



Note: Choose **Electronic Signature** to submit this contract package for signature electronically. An email is sent to the specified signatory requesting their signature. The Distributor and Reseller contacts listed during the package creation will receive a copy of the invitation email by default.

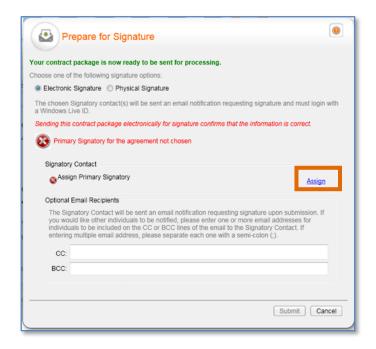
5. Click **OK** to acknowledge confirmation of submitted package.



Physical Signature

1. Click **Prepare for Signature**

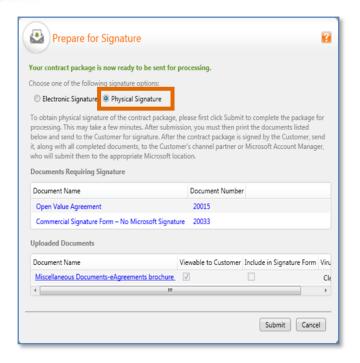
If you did not include an electronic signatory when you assigned contacts, you will receive a warning when attempting to prepare you agreement package for signature. If this preparation requires an electronic signature, return to the **Choose Contacts** section and assign electronic signatories. Alternately, click **Assign** to assign one from the *Prepare for Signature* screen.



- 2. To proceed with the physical signature option select **Physical Signature**.
- 3. Click the **Document Name** to review the desired document.

Note: Prior to submitting the contract package all documents will have a 'Draft' watermark. Documents with this watermark cannot be accepted at the Regional Operations Center for processing. Once the package is submitted successfully, the watermark on the documents is updated to 'Physically

Submitted'. Ensure all documents have this watermark before sending for Customer signature.



- 4. Use Adobe Reader to review the documents.
- 5. Click **Submit** when you have completed reviewing.

When the submission process has completed a confirmation dialog will open.

6. Click OK.

You must now print all documents included in the contract package to send to the customer for signature.

1. Click the **Document Name** to open and print each desired document.

Note: All documents will now have a 'Physically Submitted' watermark rather than 'Draft' watermark.

- 2. Click Print.
- 3. Send printed package to Customer for signature.

Note: It is important that the date of the physically signed agreement is not earlier than the agreement submitted date, or it will be invalid and the Regional Operations Center will reject it.

Withdrawal of Submission

Where a contract package is created within eAgreements, it is possible to withdraw submission of the package to make further edits should this be required. Once a package is submitted, the **Withdraw** button becomes visible. By withdrawing the package, its status returns to draft. Any edits should be completed and package resubmitted for Customer signature. Note, that once withdrawn, the previous version of the contract is void.

1. Click **Withdraw** to withdraw the agreement.



2. Click Yes to confirm the withdrawal.

When complete, there are two indicators that the package has been withdrawn:

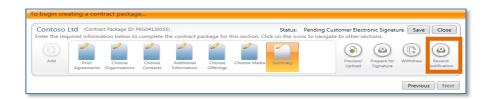
- 1. The **Withdraw** button has reverted to the **Delete** button.
- 2. The status has changed from Pending Customer Signature to Draft



Resend the Notification

It is possible to resend the Submission Notification emails.

1. Click Resend Notification.



The *Resend Email Notification* dialog box opens. You can resend to the electronic signatory you originally sent to and add an additional recipient.

- 2. Enter the Additional Recipients email address.
- 3. Enter any necessary comments.
- 4. Click Send.
- 5. Click **OK**.

Extending an Open Value Agreement

Users have the option of extending an existing Open Value Agreement in order to extend their Licensing coverage without having to create a new agreement. This can be done sixty days prior and up to thirty days after the agreement expiration.

On the Organization Search page, use the following steps to extend an Open Value Agreement.

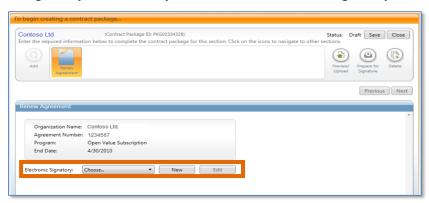
- Enter the number of the Master Agreement you want to extend in the Renew Agreement field.
- 2. Click Start.
- 3. A pop-up screen appears to show that this agreement is eligible for extension. Select the appropriate language from the **Language** drop-down list box.

Note: The pop-up can also show that the agreement is eligible to be renewed.

- 4. Select Extend existing agreement.
- 5. Choose from the **Language** drop down list.
- 6. Click Continue.



- 7. Select the appropriate signatory from the **Signatory** drop-down list box.
- 8. Click **New** to add a new signatory where required. Complete the contact details for the signatory. Alternatively, click Edit to amend the signatory's details.



9. Click **Preview and Upload** and attach any documents required.



10. Click **Prepare for Signature** and follow the directions for signature as explained in Prepare for Signature.

Renewing an Open Value Agreement

Users can renew an existing Open Value Agreement into a new Open Value agreement. This can be done sixty days prior to and up to thirty days after the agreement expiration. The tool also allows out of grace renewals. Regional Operations Centers have the empowerment to approve exceptions up to 120 days after renewal date. If a renewal is required later than 120 days, contact your subsidiary for approval (special deal). The special deal number should then be included in the CLT log requesting that the new agreement be set up as a renewal and backdated to ensure no gap in coverage.

On the Organization Search page, use the following steps to extend an Open Value Agreement.

- Enter the number of the Master Agreement you want to extend in the Renew Agreement field.
- 2. Click Start.
- 3. A pop-up screen appears to show that this agreement is eligible for renewal.

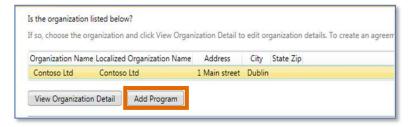
Note: The pop-up may also show that the agreement is eligible to be extended.

- 4. Select Renew into a New Agreement.
- 5. Click Continue



The organization appears on the Organization Search page

- 6. Select the organization name.
- 7. Click Add Program.

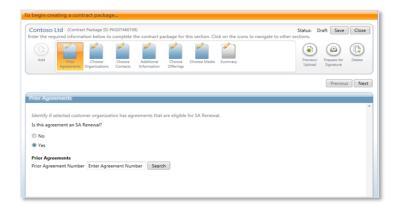


- 8. Configure your program choices on the **Choose Program** dialog box.
- 9. Click **Next**.

This action brings the user to the *Prior Agreements* page.

10. Choose **Yes** or **No** to indicate whether the Customer organization has agreements that are eligible for Software Assurance by selecting the appropriate media button.

You may add additional prior agreements simply by entering additional prior agreements in the Prior Agreement Number field and clicking Search. Additional prior agreements will appear in the Selected Prior Agreements table.



11. Click the **Choose Organizations** tab to continue building what essentially is a new Open Value Agreement. Continue the package creation process for as described in the Open Value Agreement section.

Accepting and Signing the Agreement

When a contract package is created and submitted for electronic signature an e-mail is sent to the Customer signatory. This instructs them to complete the agreement process by clicking the *Accept and Sign* link, logging into the eAgreements web site and electronically accepting the agreement.



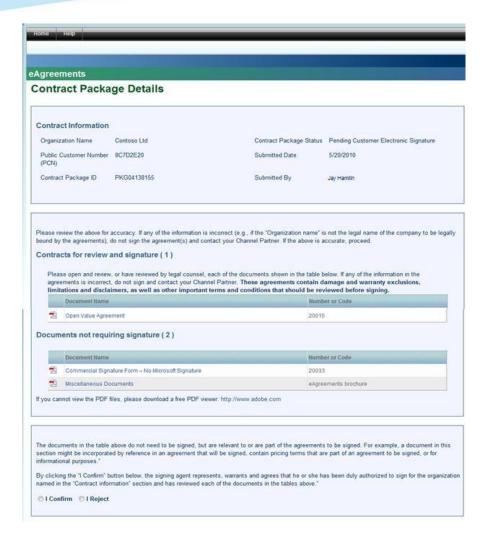
- 1. Click on the link in the notification email to open the eAgreements Website.
- 2. Sign in with your **Microsoft Account.**

Note: It is also possible to create a Microsoft Account at this stage if you do not already have one.

Unlike eAgreements for OV, with the new eAgreements tool, customers can now sign multiple contract packages associated to the same organization using a single Microsoft Account.

On signing in, the Contract Package view opens.

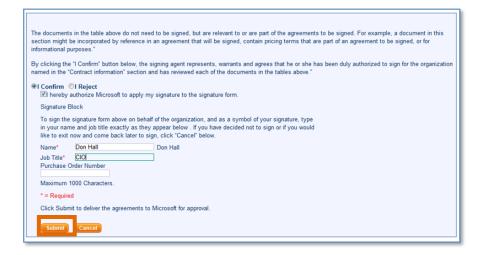
- 3. Click the **Document** Name to view the contents of each document.
- 4. Review the agreement.



Accepting

To sign the contract package, review the documents and acknowledge your review by completing the following steps:

- 5. Click I Confirm.
- 6. Select I hereby authorize Microsoft to apply my signature to the signature form.
- 7. Enter your **Name** exactly as it appears on the form.
- 8. Enter your Job Title.
- 9. Click Submit.

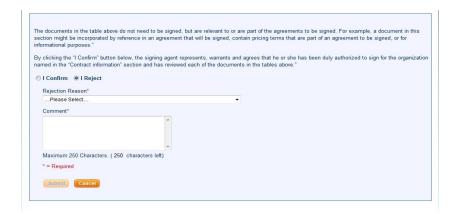


Upon submission, the document package is routed to Microsoft for final processing. Barring any activation issues, the contract package will be activated in eAgreements. An email notification sent to the Distributor and Reseller to advise when the package is active. The Customer will receive a welcome letter. Once an order is placed, if requested media will be shipped.

Rejecting

Signers also have the ability to reject their Contract Package. To reject a contract package, click **I Reject** and specify the **Rejection Reason**, and provide additional details in the **Comment** section. The entire package is routed back to the Agreement Creator, who can review your comments, edit the document package, and resubmit as needed.

Note: If you want copies of any of the documents in your package, you must save and/or print them <u>before</u> you reject the package. Once rejected, the document package will disappear from your view, as it will no longer be in an active status for you.



Summary

This eAgreements User Guide has demonstrated how to use the eAgreements tool to create and manage agreements for the **Open Value** and **Open Value Subscription** programs. The guide demonstrates the creation, assembly, signature, and execution of these agreements.

By automating the complexities of setting up and signing an agreement, the eAgreements tool can help reduce data input errors and cycles times, thus improving the Partner and Customer experience with the agreement process.

Note: For information on using eAgreements with Enterprise Agreements, Select Plus, Service Provider License (SPLA), Enrollent for Education Solutions (EES) and other programs, see the other guide titled **eAgreements User Guide:** All **Programs**.