

Microsoft 365 Unattended License licensing guidance

Summary

This guide explains how to license bots that access the Windows Desktop OS, Microsoft 365 Apps, or other components of Microsoft 365 E3/A3 to perform Robotic Process Automation.

Understanding Robotic Process Automation and bots

Robotic Process Automation (RPA) refers to when an application (or set of applications) captures data and/or manipulates applications to perform tasks. A bot is a computer program that executes the steps in an RPA process. RPA is the action and process performed by the bot, whereas the bot is the entity executing said actions. Bots are often utilized to assist a person to execute automation and repetitive tasks and cannot be utilized to reduce the number licenses that would typically be required for device or software use.

Bots can interface with applications through the UI the same way a user does. Such bots are “trained” by their users by being “shown” how to complete a task and typically follow logical rules such as “if/then” rules while reading and writing to databases. Bots also work with and drive existing applications by opening emails and attachments or inputting data into forms.

You will find slight variations across the industry on bot definitions. Microsoft has its own definitions to provide clarity to customers for their specific needs and the potential software licensing implications when implementing RPA. When we look at Microsoft’s view into licensing Robotic Process Automation solutions, we follow the same general outlines as the broader industry definitions. “Robotic Process Automation”, “RPA” or “bots” means an application, or any set of applications used to capture data and manipulate applications to perform repetitive tasks.

We also classify bots into two distinct categories – *Attended* and *Unattended*. Below are examples of Attended and Unattended bots.

“Attended bot” - An Attended bot assists a person to execute automation on the person’s local and/or remote workstations. It operates concurrently with the person on the same workstation/s to accomplish repetitive tasks and is triggered by explicit actions of that person. Examples include:

- Cutting pasting information from one screen to another
- The user triggering an action to auto-update a customer’s contact information
- The user clicking a keyboard key combination in order to send a meeting invite for the next available time to a specified colleague

“Unattended bot” – Any bot that doesn’t conform to the definition of “Attended bot” should be considered an “Unattended bot.” Examples include:

- Running SQL queries and inputting data into forms
- Sending Excel reports at midnight through an automated process
- Having an application use Microsoft Word to automatically open submitted files and extract data to a CRM application

Examples of Robotic Process Automation

The following examples highlight methods for accomplishing the same task with and without an RPA solution:

Example 1: Message forwarding. A user receives a message from corporate and needs to send to multiple people in the organization.

- **With Attended RPA:** If there is a macro that allows the user to click a button and send the message to all parties.
- **With Unattended RPA:** If there is a macro that runs autonomously by recognizing the mail and sends the message to all parties without the user performing any action.
- **Without RPA:** If the user manually sends the message to all parties.

Example 2: Web and screen scraping. RPA can be used to scrape web sites and screens for specific information (stock, news, media, content, etc.), consolidate it, and present it to the end user.

- **With Attended RPA:** A macro allows the user to click a button and specified content on the site or screen is captured and consolidated.
- **With Unattended RPA:** A macro autonomously scans for specified content on the site or screen and captures and consolidates it.
- **Without RPA:** A user manually scans the site or screen to physically capture and consolidate the content.

Example 3: Incoming customer email responses. Where an organization traditionally has a team that handles the first line of support to respond to customer inquiries, an RPA solution can be implemented tied to keywords or phrases with “canned” answers or links to relevant information.

- **With Attended RPA:** A macro allows the user to trigger sending a pre-determined answer to the customer.
- **With Unattended RPA:** A macro automatically responds to customer emails with canned answers based on key words in the submission.
- **Without RPA:** A user manually reads and chooses the appropriate pre-determined answer to respond to the customer.

Example 4: Onboarding new employees. An RPA solution can assist new employees with finding pertinent information and getting set up in their organizational system for a smooth onboarding process.

- **With Attended RPA:** A macro that managers can trigger to provide pertinent information to a new employee.
- **With Unattended RPA:** A macro that recognizes when a new employee has started and automatically sends them pertinent information.
- **Without RPA:** A manager manually sends pertinent information to their new employee after they start.

Example 5: Forms or data processing. An RPA triggers a macro to read information and write to systems instead of manual data entry.

- **With Attended RPA:** A macro that is triggered by the user to assist them in writing data into a system.
- **With Unattended RPA:** A macro that runs overnight autonomously reading a data source and writing to a new backup system.
- **Without RPA:** A user manually reads information and physically writes it another system.

Example 6: Data transfer. Managing data transfer or backups with an RPA solution with source, destination, and credential information.

- **With Attended RPA:** A macro that triggered by the user reads data and transfers to another source destination.
- **With Unattended RPA:** A macro that runs autonomously, logs in with credentials, and processes data backup without user guidance.
- **Without RPA:** A user manually processes the data transfer and backups to another destination.

Licensing requirements for unattended bots

Any Unattended bot that accesses Windows desktop OS or Microsoft 365 Apps must be licensed with Microsoft 365 - Unattended License. Unattended bots may not create or replicate activities or workflows on behalf of an unlicensed user or device. Each Microsoft 365 - Unattended License allows an unattended bot to use Microsoft 365 E3/A3 (including Microsoft 365 Apps) on a single physical or virtual Operating System Environment (OSE) for RPA. [View related Product Terms](#) for details on requirements and restrictions.

Example scenarios

Scenario 1 - Finance Data Capture & Entry

A finance department receives invoices attached to Outlook email messages. The department would like to automate the process of capturing data from the invoices and entering the information in a legacy procurement system. The automation will occur without an employee's involvement across 5 virtual machines (VMs) in order to accommodate the anticipated volume of 10,000 invoices/month.

Licensing Solution: 1x Power Automate per flow plan, 5x Power Automate unattended RPA add-on, and 5x Microsoft 365 – Unattended License

Rationale: This scenario is setting up an RPA solution that is automated (unattended) and accessing an Microsoft 365 app (Outlook) and running on 5 machines. Due to the Microsoft 365 Apps requirement, the Microsoft 365 - Unattended License (x5) is required for each machine. In addition to this, each machine also requires the Power Automate unattended RPA add-on (x5). Finally, the Power Automate unattended RPA add-on also has a prerequisite of the Power Automate per flow plan (x1).

Scenario 2 - HR Reporting

An HR department has 10 users that send Excel reports daily. Each user will create a 3rd party bot that runs autonomously at midnight and distribute these reports. The automation will occur without employee involvement on each user's desktop

Licensing Solution: 10x Microsoft 365 – Unattended License

Rationale: This scenario is setting up an RPA solution that is running autonomously (unattended) and accessing a Microsoft 365 app (Excel). Since this solution is not utilizing Microsoft's Power Platform, the bot does not require any additional licenses.

Frequently Asked Questions

See [FAQ](#) page.

This content is for informational purposes only. **MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, ON THIS PAGE.** This information is provided to help guide your authorized use of products you license; it is not your agreement. Your use of products licensed under your volume license agreement is governed by the terms and conditions of that agreement. In the case of any conflict between this information and your agreement, the terms and conditions of your agreement control.