# Enterprise Agreement

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# Enterprise Agreement Program Guide
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# Enterprise Agreement Program Guide

Use this guide to learn more about your Microsoft Enterprise Agreement.

## The Microsoft Enterprise Agreement

The Microsoft Enterprise Agreement (EA) provides you with the best overall pricing based on your organization's size, the benefits of Software Assurance, as well as simplified licensing management via your organization-wide agreement. And as more companies implement cloud services, the EA provides a seamless way to license both on-premises software and cloud services all in the same agreement. With a single agreement, you gain the flexibility to choose software and cloud services for different user types and deployment scenarios, optimize your technology spend to fit your IT and user needs, and streamline software compliance and asset management across all of your Microsoft purchases.

## How the Enterprise Agreement Works

The Enterprise Agreement is appropriate for your organization if you have more than 250 PCs, devices and/or users and want to license software and cloud services for your organization for a minimum, three-year period. Regardless of size, as an EA customer you will sign a Microsoft Business and Services Agreement and, at your choosing, one or more Enrollments.

### Purchasing through Enrollments

Enrollments are designed to help your organization license Microsoft solutions, delivered via on-premises licenses and/or cloud services. They can be a very cost-effective way to purchase software and solutions to address key organizational objectives such as standardizing on PC and device technologies, building secure and well managed datacenters or helping your IT staff build, manage and maintain up-to-date application platform structures. While they do focus on different aspects of IT, the enrollment agreement structure allows for the easy addition of new products, services and licensing options to better support future licensing and deployment scenarios.

When comparing these Enrollments, you'll see they typically differ based on key purchasing terms such as available products and services, minimum purchases, pricing, purchase timelines and other benefits. Through these Enrollments the EA:

▶ Allows you to equip new users, devices and server equipment with software and cloud services you are already using and then account for these changes once a year through an annual reconciliation process known as True-up.

▶ Offers significant savings on top of the EA's volume pricing levels.

▶ Includes Software Assurance benefits that you can use to enable hybrid/cloud deployments and employee-owned device options, plan deployments, ready your users for new software, and support Microsoft products and services without incurring additional costs.

▶ Offers Subscription Program options for products offered through the Enterprise Enrollment and Enrollment for Core Infrastructure.

#### Enterprise Enrollment
The Enterprise Enrollment enhances manageability and cost savings when equipping your entire organization with the latest versions of the Windows operating system, Office Professional Plus and/or Client Access License (CAL) Suites to connect users/devices to Microsoft Server products.

Moreover, the Enterprise Enrollment lets you choose whether to run PC and device software and/or cloud services across your organization, with the ability to license both on-premises software and online services such as Office 365 and Windows Intune. You also have the

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The Enterprise Agreement gives you the flexibility to purchase software and cloud services for different user types, while retaining the best overall pricing based on your organization's size.

flexibility to maintain a mix of on-premises and online services to suit user needs, and can transition from on-premises licensing to equivalent Online Services as business priorities change. Such organization-wide implementations help you reduce device and user management and support costs, and provide additional pricing advantages above the EA's standard volume pricing levels.

## Enrollment for Application Platform

The Enrollment for Application Platform (EAP) is a flexible and cost-effective option for updating and deploying Microsoft Application Platform products across your organizations. You can license any one or more of the following products under the EAP: SQL Server, BizTalk Server, SharePoint Server, and Visual Studio, and receive attractive upgrade provisions and product savings when you do so.

## Enrollment for Core Infrastructure

Enrollment for Core Infrastructure (ECI) lets you acquire and manage Microsoft's core infrastructure products under a single agreement. Based on your virtualization needs, you choose whether to license the Core Infrastructure Suite (CIS) Datacenter or Standard Edition, or a mix of both. These core infrastructure suites offer a cost-efficient way to license the Windows Server operating system, and Microsoft System Center server management together with a single processor-based license.

## Enrollment for Windows Azure

Enrollment for Windows Azure (EWA) lets you subscribe to and manage your Windows Azure services under a single agreement. You choose how you use Windows Azure services, which are sold under consumption-based, per-unit billing models. Volume pricing discounts are available and are based on your annual monetary commitment level.

It is importance to note that you may subscribe to Windows Azure services as Additional Online Services through other Enrollments, with the same purchase commitments and pricing as with EWA. As such, you may decide to add Windows Azure to an existing Enrollment to help streamline agreement management and synchronize annual reviews and/or renewal timelines. The EWA, as intended, is an ideal licensing agreement for customers wanting to purchase Windows Azure services outside existing EA Enrollments.

## Enterprise Subscription Program Options

For the Enterprise Enrollment, Enrollment for Core Infrastructure and Enrollment for Windows Azure, the EA provides a subscription program option. This option offers a lower initial cost based on a three-year subscription, and the ability to increase or decrease subscription counts on an annual basis. This ability to grow or downsize subscription counts can be attractive, especially if you expect significant fluctuations in workforce size and IT requirements. However, unlike a standard Enterprise Agreement Enrollment where you retain perpetual use rights for the licenses you purchase, with these subscription programs you gain access to Microsoft software only for as long as you maintain your subscription. If you decide not to renew, you relinquish your rights to run the software, unless of course you choose to acquire your licenses through the program's "buy out" option.

**Note:** The subscription program option is not available for Enrollment for Application Platform.

**Note:** Subscription licenses for cloud services are not perpetual under any circumstance unless specified otherwise in the Microsoft Product List and Product Use Rights documents.

Microsoft

# Enterprise Agreement Program Guide

With your Enterprise Agreement you can license the full breadth of Microsoft Online Services.

**Office 365** offers cloud versions of Microsoft's most trusted communications and collaboration products with the latest version of the Office suite.

**Windows Intune** helps you manage and secure PCs anywhere with cloud services.

**Microsoft Dynamics CRM Online** offers flexible sales, marketing and service solutions that integrate with other Microsoft products, plus customization and partner offerings.

**Windows Azure** is an open and flexible cloud platform that enables you to quickly build, deploy and manage applications across a global network of Microsoft-managed datacenters.

## Software Assurance

Microsoft Software Assurance offers you 24×7 support, deployment planning services, training, and the latest software releases and unique technologies—all through one program. You can improve end-user productivity with online training and home use licenses to help enhance skills and accelerate familiarity with Microsoft software. To help your IT staff efficiently implement and manage Microsoft products and services, Software Assurance provides technical training and access to new software releases when they become available, plus access to unique technologies found in the Windows Enterprise Edition operating system and the Microsoft Desktop Optimization Pack. In addition, Software Assurance supports a greater variety of cloud and hybrid deployment options with extended license rights that let you deploy existing server application licenses in shared datacenters. Finally, newer benefits for Windows 8 enable access to Windows desktop environments from more devices to support bring-your-own-device scenarios and worker preferences. *(See Appendix B for a descriptive listing of Software Assurance benefits.)*

## Available Software and Cloud Services

Through your Enterprise Agreement you can choose to order software licenses and cloud services separately, or purchase groups of products such as Desktop Platforms and Core Infrastructure Suites and receive additional savings over purchasing these products separately.

You will also see a distinction made between Enterprise Products that are available with an organization-wide purchase commitment, versus Additional Products and Enterprise Online Services that usually do not require such a commitment.

The complete list of Enterprise Products is available on the [Microsoft Product List](#).

### Enterprise Products and Platforms

Enterprise Products include on-premises licenses for Microsoft core PC and device products, namely Windows Enterprise Edition operating system, premium edition Office suite, and applicable Client Access Licenses in the form of CAL Suites. With the Enterprise Agreement, Enterprise Products must be licensed on an organization-wide basis and may be ordered as separate products, or in groups of products known as Desktop Platforms.

**Desktop Platforms**

The **Professional** Desktop Platform includes:

- Windows Pro/Windows Enterprise upgrade, and
- Office Professional Plus, and
- **Core** Client Access License (CAL) Suite

The **Enterprise** Desktop Platform includes:

- Windows Pro/Windows Enterprise upgrade, and
- Office Professional Plus, and
- **Enterprise** Core Access License CAL Suite

**Note:** All Windows operating system licenses provided under the Enterprise Agreement are upgrade licenses. This means you'll need a base Windows operating system (OS) license on those devices for which you plan to use a Windows upgrade license. You can choose to upgrade to Windows Pro or Windows Enterprise operating system.

**Note:** With either Desktop Platform you may add the Microsoft Desktop Optimization Pack (MDOP) to help streamline deployment and device management.

### Application Platform Products

Application Platform products, including SQL Server, Visual Studio, SharePoint, and BizTalk Server provide a set of integrated tools and technologies to support the rapid development of new applications and help you make significant gains in productivity while decreasing total cost. You may license these products and relevant Client Access License (CALs) through the Enrollment for Application Platform and receive attractive upgrade provisions and product savings when you do so.

### Core Infrastructure Suites

Core Infrastructure Suites align the licensing for Windows Server and System Center server management together with a simplified, processor-based licensing model. Through the Enrollment for Core Infrastructure, you choose whether to license the Core Infrastructure Suite Datacenter or Standard Edition, or a mix of both based on your private cloud processor counts and virtualization requirements.

### Additional Products

A broad selection of Microsoft products and services are available as Additional Products. They may be added initially or at any point during the term of your Enterprise Agreement, allowing you to more easily build and maintain departments or divisions with specific needs and still enjoy volume pricing advantages and an annualized payment option. Additional Products may include device-based licenses, user-based licenses, cloud services, professional services and other licenses that support your IT environment such as CALs. *(For more detailed information about CALs and their use in Enterprise IT environments see Appendix B: A Detailed Look at Client Access Licenses and Microsoft CAL Suites.)*

### Commitment on Use Rights

Commitment on Use Rights provides you with the added security of knowing exactly what the use rights are for the products you license under your Enterprise Agreement Enrollment(s). While Microsoft may change Use Rights from time to time, these changes will not impact your Use Rights that are in effect at the time you purchase products via your EA. In other words, as an EA customer you may exercise the Use Rights that were in place at the time of your initial purchase, or if you prefer to do so, you may exercise newer Use Rights which Microsoft may modify following your original order.

## Cloud Services

With respect to your Enterprise Agreement, cloud services will typically fall into two classes, Enterprise Online Services or Additional Online Services. These may be added to your EA using the standard purchasing process, or as in the case of Office 365 and Windows Intune, by transitioning users from Enterprise Products to comparable Enterprise Online Services.

### Enterprise Online Services

These are services that are designated as Enterprise Online Services in the [Microsoft Product List](). These typically fall in line with existing on-premises Enterprise Products so that the two may be thought of as equivalents when satisfying organization-wide licensing commitments and establishing volume pricing levels.

With the EA you can move select on-premises licenses (Enterprise Products) to comparable cloud services (Enterprise Online Services) over the life of the EA. As an example, you might move workers to cloud services in one division or one department at a time. To support this move, transition rules have been established to help you move users to Office 365 and Windows Intune services, and help assure that you do not pay twice for similar capabilities.

Finally, if at a future date you wish to move users back to on-premises software purchased through your Enterprise Enrollment, you may do so under the program's guidelines.

### Additional Online Services

These are services that are designated as Additional Online Services in the [Microsoft Product List](). Additional Online Services include an array of cloud platform and services which you may purchase through your Enrollments as needed, similar to how you purchase Additional Products through your Enrollments today.

With Dynamics CRM Online, organizations get a full-featured CRM application designed to improve marketing effectiveness, boost sales, and enrich customer service interactions on a per-user subscription bases.

With Window Azure you have an open and flexible cloud platform that enables you to quickly build, deploy and manage applications across a global network of Microsoft-managed datacenters. As such, Windows Azure offers a range of cloud computing, data management and networking services which utilize consumption-based, per-unit billing models. When purchase through your EA, volume pricing discounts are available and apply to both your initial annual monetary commitment level and any additional Windows Azure service capacities you may add throughout your EA.

## Support and Consulting Services

### Premier Support Services

The EA allows you to add a variety of Microsoft Premier Support offerings to provide the optimum level of pro-active and reactive support for your chosen Microsoft solutions. Premier Support complements your EA with support that maps to your purchasing decisions and may be managed as part of your overall agreement.

### Enterprise Strategy Services

The Microsoft Enterprise Strategy Program (ESP) provides you with a dedicated Microsoft Enterprise Architect who will focus on business impact and value by optimizing the use of technology throughout your EA. In addition to supplying access to Microsoft-internal knowledge base and numerous other resources, ESP provides a programmatic approach to help enable business transformation, advance technology thought leadership, foster innovation, and maximize the value of Microsoft products and services.

# Enterprise Agreement Program Details

## Pricing

### Volume Licensing Pricing Principles

The annual price-per-license budgeting feature of the Enterprise Agreement is predictable, so you can forecast software technology costs up to three years in advance. A payment (based on your initial order) is due each year on the anniversary of your EA Enrollment. Should you add additional hardware/users during your agreement, the per-license costs remain the same or may be lower given the program's volume pricing levels.

### Enrollments and Pricing

At the onset of your Enrollment pricing is based on a tiered volume discount structure, meaning the greater the size of your purchase commitment the less you will pay for an individual license. In a similar fashion, you may qualify for lower, per-unit prices should you add additional

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Microsoft Payment Solutions help you get the technology you need with the budget you have.

Windows Azure service capacities over and above your initial commitments. *(See Appendix A for an at-a-glance comparison of EA Enrollment options.)*

## Flexible Payments
**Spread Payments**

Payments for products and services purchased at signing may be spread over three annual payments mapping to your yearly agreement anniversary. This is a benefit of the EA's Software Assurance coverage and is offered as an optional payment term with no cost-of-money fees.

**Payment Solutions**

Microsoft Payment Solutions helps you expand your IT purchasing power and improve cash flow with easy, flexible, and affordable payment plans. You can apply Payment Solutions to all EA purchases and match payments to align with your business requirements.

Payment Solutions offer:

▶ Flexible Payment Structures: Set-up monthly, quarterly or semi-annual payment structures, or arrange to ramp up or defer payments.

▶ Services Payment Solutions: Payment solutions for a wide range of Microsoft services such as Premier Support.

▶ Total Solution Financing: Payment solutions for complete software, services and hardware solutions including non-Microsoft products.

**Note:** Microsoft offers Payment Solutions to credit approved customers in specific countries with third-party financing providers under the Microsoft Financing program. Learn more about Microsoft Payment Solutions at [www.microsoft.com/financing](www.microsoft.com/financing).

## Agreement Anniversary: Annual Reconciliation

Over the life of your EA, you can equip additional hardware, devices, or users with software and online services you've already licensed, and then account for these changes through an annual reconciliation process known as True-Up. If you have an Enrollment with an Enterprise Subscription program this process is known as an Annual Order, through which you can increase or decrease your license subscription counts.

Once a year, you are asked to reconcile your EA licenses to account for the total number of licenses you've added in the previous 12 months. This effort culminates in an order you place (or an Update Statement you submit) that reconciles all the qualified devices, users, and processor units added or used by your organization over the course of the year. Your annual reconciliation order (or Update Statement) is due 60-30 days prior to your Enrollment anniversary, which helps Microsoft ensure you're taking advantage of allowable license transitions or license reductions before issuing your annual invoice. *(See the Enterprise Agreement True-up Guide for more information.)*

**Windows Azure**

A notable exception to this annual True-up model occurs with Windows Azure. At the start of your Windows Azure subscription term, your initial annual monetary commitment serves as a "baseline" of sorts. Should your actual usage surpass that amount, you will be invoiced for any overage on a quarterly basis. However, you may increase your commitment level at any time during your subscription term to help realign your monetary commitment to projected use volumes. This not only offers the advantage of fostering payment predictability, but may lower your costs as Windows Azure rates associated with your annual monetary commitment

(Commitment Rates) are lower than the standard Windows Azure Consumption Rates. *(Learn more about Windows Azure pricing and payment terms in the [Microsoft Product List](#).)*

## Renewing Enrollments

While Microsoft and customers often talk about renewing an EA, technically renewal decisions are made for individual Enrollments. Your EA may contain several Enrollments such as the Enterprise Enrollment, Enrollment for Core Infrastructure (ECI), or Enrollment for Application Platform (EAP).

### Options for Renewing your Enrollments

At the end of your three-year Enrollment term, you'll have the option to renew for another three-year cycle. Beyond your initial three-year agreement, renewal pricing for on-premises software licenses is based on Software Assurance only—a moderate percentage of Enterprise Pricing for on-premises licenses.

If you have an Enrollment with an Enterprise Subscription Program this renewal differs in that renewal pricing for on-premises software licenses is based on License plus Software Assurance. Furthermore, a buyout option exists for customers who want to retain perpetual rights to previously licensed on-premises software.

If you have an Enrollment for Windows Azure, you may choose to renew this Enrollment for a 12-month term or arrange to have it end at the same time as your other Enrollment(s).

As with the annual reconciliation process, it is important to work with your Microsoft Account Representative or Partner to submit your renewal order 30-days before your agreement term ends in order to avoid losing valuable licensing rights, continuity of cloud services and other benefits.

# Managing your Enterprise Agreement

## Adding Products and Cloud Services

Throughout your Enterprise Agreement term you may adjust your Microsoft on-premises software and cloud services licenses in two ways:

- ▶ If you add new users or devices, you can equip them with software and cloud services you are already using and then account for these changes at your next agreement anniversary through an annual reconciliation process known as True-up.

- ▶ If you want new products or cloud services, you can order these through your Microsoft Reseller at any time during your agreement.

## Software Asset Management

Software Asset Management (SAM) is an industry best practice that helps you control costs and optimize software investments across your organization. Administered through an ongoing plan, SAM makes it easier to identify what you have, where it's running, and whether redundancy may exist. Microsoft offers several resources that you may use to establish or improve your SAM practices.

The Microsoft SAM site provides a SAM optimization kit, links to several SAM self-service tools to assist with deployment discovery and a list of Microsoft Certified SAM Partners whom you can contact directly, should you wish to have experts help you devise and implement a Software Asset Management plan. (*See [Microsoft Software Asset Management website](#) for more details.*)

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Use the Volume Licensing Service Center to access all of your licensing information, download product and manage Microsoft Online Services.

**Tracking CALs**

The Microsoft Assessment Planning (MAP) Toolkit features an IT-based Software Usage Tracker functionality which provides usage reports for the following server products: Windows Server, Exchange Server, SQL Server, SharePoint Server, and System Center Configuration Manager.

This automated software asset management-related functionality is designed to be used by Microsoft Volume Licensing customers. The Software Usage Tracker provides you with a view of your actual server usage, which can be valuable for comparing with your purchased CALs, or for True-up and agreement renewal discussions. *(Learn more about CALs in Appendix C: A Detailed Look at Client Access Licenses and Microsoft CAL Suites. Learn more about MAP Toolkit at* *www.microsoft.com/map.)*

## Product Fulfillment VLSC

The Volume Licensing Service Center (VLSC) is the primary location for Microsoft Volume Licensing customers to view licensing information, download Microsoft software and manage Volume Licensing benefits and subscriptions.

The VLSC licensing dashboard includes a notification area for site alerts, a Volume Licensing news and announcements section, and links to key tasks. VLSC helps you manage your Enterprise Agreement purchases with:

► Licensing information composed of the Licensing Summary and the Relationship Summary.

o Licensing Summary. You can use VLSC to view current and past Microsoft License Statements across programs and agreements.

o Relationship Summary. VLSC includes a report that shows all Volume Licensing agreements associated to a user's profile. You can also view further details about offerings, contacts, licenses, and purchase orders. The Relationship Summary provides a consolidated summary of all Volume Licensing IDs associated with the user's Windows Live ID when accessing VLSC.

► Downloads. Accelerated download speeds and a simple, secure user interface make it easier and safer for you to use VLSC to find the right product, based on your licensing entitlements.

► Product Keys. VLSC makes it easier for you to request product keys for the Windows operating system, enables retrieval of volume license keys for all Microsoft licensed products, and provides access to technical support.

► Software Assurance Benefits Summary. You can view the Software Assurance benefits available across all agreements associated to a user's profile. The Software Assurance Benefits Summary includes the total eligible quantity of benefits across all agreements, benefits that have not yet been used, and benefits that have not yet been activated.

► Online Services. Access details about Microsoft Online Services subscriptions and how to manage them.

► Subscriptions. Access details and management tools for Microsoft Developer Network (MSDN) and TechNet subscriptions.

► Help. Access information about the VLSC site, an FAQ, and contact details for the Support Center.

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## Managing Cloud Services

While management processes may be modified to accommodate future cloud service offerings, currently there are three principle ways to manage Microsoft cloud services:

▶ Use the Microsoft Account for Organizations Portal to administer your Office 365, Windows Intune, and Dynamics CRM subscriptions. This consolidated portal lets you view your online services subscription licenses as well as provision and manage individual user accounts and administrative privileges (for example manage domain re-delegation, directory synchronization, and single sign-on).

▶ Similarly, you may use the Windows Azure Enterprise Portal to manage your accounts, configure rules and settings for various Windows Azure services, and generate reports.

▶ Use Microsoft System Center to manage both public and private Microsoft cloud implementations. System Center's comprehensive management capabilities enable it to monitor and manage your entire IT infrastructure stack from traditional physical servers, virtualized servers, virtual machines, running workloads and all the way up to service-based cloud components.

## Using Software Assurance

Whether you want to download the latest Windows Enterprise Edition software, get 24x7 Problem Resolution Support or give employees access to Office training, you will need to claim your benefits through the Volume Licensing Service Center (VLSC).

Once you are signed into VLSC, you will follow different steps depending on the specific benefit you want to use. Instructions for claiming and using each benefit are posted on the Software Assurance Web site. *(See the [Software Assurance website](#) for more details.)*

## Getting Premier Support

Premier Support provides annually allocated support through the term of your EA Enrollment. There is no concept of a True-up for Premier Support but rather additional hours are purchased, as needed, to supplement your particular level of Service. Using Premier Support is a matter of contacting your assigned Microsoft Services Representative(s).

## Getting Enterprise Strategy Services

Enterprise Strategy Program (ESP) provide access to an annually allocated Microsoft Enterprise Architect, and other services throughout the term of your EA, as described in the [Microsoft Product List](#). There are three different service offering (Connect, Foundation, and Portfolio) but no concept of a True-up for ESP. Instead, additional capacity may be purchased through a Capacity Add-On option.

## Making use of Payment Solutions

Microsoft Payment Solutions may be used at any point during the life of your agreement. Whether you are initiating a new EA, renewing an existing EA, reconciling annual growth via True-ups, or purchasing additional products, services or hardware, Microsoft Payment Solutions can help you acquire your desired IT solution while accommodating your business requirements.

To learn more about Payment Solutions contact your preferred Microsoft Reseller or Representative.

## Resources

### Online Management Tools and Information

Designated members of your organization gain access to the following online tools to use and manage aspects of your Enterprise Agreement.

▶ Volume Licensing Service Center (https://www.microsoft.com/Licensing/servicecenter/default.aspx). Use the Volume Licensing Service Center to download licensed products, access product keys, and manage your Volume Licensing agreements and license acquisition activity—all in one online location.

▶ Software Assurance Benefits (www.microsoft.com/softwareassurance). Most benefits can be accessed through the Volume Licensing Service Center. The Software Assurance Web site provides everything you need to know to get started.

**Note:** When you subscribe to Microsoft cloud services you gain access to online administration and monitoring tools. See *Managing Cloud Services* on previous page.

### Buying, Renewing or Adding to the Enterprise Agreement

To buy, renew, or add products and services to your Enterprise Agreement, contact your Microsoft Authorized Enterprise Software Advisor (ESA) or Microsoft Authorized Large Account Reseller (LAR).

- In the United States, call (800) 426-9400, or find an authorized reseller.
- In Canada, call the Microsoft Resource Centre at (877) 568-2495.

**Academic, Government and Charitable Organizations**

Contact your Microsoft Reseller to buy, renew or add products and services to your Enterprise Agreement.

If you are affiliated with an academic, government or charitable organization there are additional Volume Licensing programs available to you, which may include additional partner and pricing advantages. Visit the Microsoft Volume Licensing website for more information.

**Worldwide**

For information about Volume Licensing offerings available in your area, find the Microsoft Volume Licensing website for your country/region.

### Where to Learn More

Microsoft Worldwide Volume Licensing www.microsoft.com/licensing

Microsoft Online Services www.microsoft.com/licensing/onlineservices

Software Assurance www.microsoft.com/softwareassurance

Microsoft Volume Licensing Service Center www.microsoft.com/licensing/existing-customers/manage-my-agreements.aspx

Microsoft Financing www.microsoft.com/licensing/how-to-buy/financing.aspx

# Enterprise Agreement Program Guide

## Appendix A: Comparing Enrollments

Below is a comparison between the Enterprise Enrollment, Enrollment for Application Platform, Enrollment for Core Infrastructure and Enrollment for Windows Azure.

| Enterprise Agreement | Products | Program Mechanics |
|---|---|---|
| Enterprise Enrollment | ・ CAL Suites<br>・ Office Professional Plus<br>・ Windows OS<br>・ Additional Products and Online Services | ・ Yearly True-up<br>・ Three-year term<br>・ Cover all desktop PCs (except with certain Online Services)<br>・ Additional products (available)<br>・ Ability to Transition from on-premises to equivalent Online Services<br>・ Software Assurance required |
| Enrollment for Application Platform | ・ SQL Server<br>・ BizTalk Server<br>・ Visual Studio<br>・ SharePoint Server | ・ Yearly- or three-year True up options<br>・ Three-year term<br>・ Minimum initial purchase required<br>・ Software Assurance required:<br>　o License and Software Assurance (L&SA) on all new licenses<br>　o Defer License cost for any units not currently covered by Software Assurance at signing<br>・ No Subscription Program Option available |
| Enrollment for Core Infrastructure | ・ Datacenter and Standard Server Suites:<br>・ Windows Server<br>・ System Center | ・ Yearly True-up<br>・ Three-year term<br>・ Minimum initial purchase required<br>・ Choose from two suite editions<br>・ Per-processor licensing<br>・ Software Assurance required |
| Enrollment for Windows Azure* | ・ Windows Azure Services | ・ One-year and coterminous subscription options**<br>・ Three-year term<br>・ Minimum initial purchase required<br>・ No Software Assurance |

* Windows Azure services may be purchased as Additional Online Services through other Enrollments with the same purchase commitments and pricing as with the Enrollment for Windows Azure.

**Coterminous subscription option means you can arrange to have your Enrollment for Windows Azure end at the same time as your other Enrollment(s) are scheduled to end.

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# Appendix B: Enterprise Agreement Structure

### Enterprise Agreement Structure

The structure of the Enterprise Agreement consists of three components: the Microsoft Business and Services Agreement (MBSA), Enterprise Agreement, and any Enterprise Agreement Enrollment(s). The MBSA covers multiple Microsoft Volume Licensing programs including the Enterprise Agreement and also Services terms. The Enterprise Agreement governs all Enrollments signed under the EA. Each Enrollment then contains terms which apply only to the specific offers available under that Enrollment, as well as outlines ordering, billing and pricing terms. The purpose of this agreement structure is to simplify the license agreement process by allowing general governing contract terms to be signed once, without the need to re-negotiate terms when you choose to purchase additional licenses through your Enrollment(s).
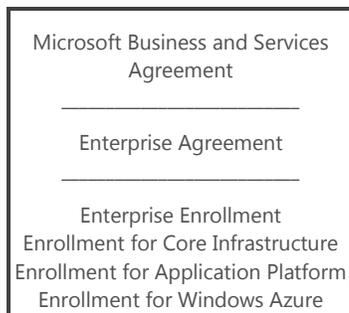
#### Agreement Components

A Microsoft Business and Services Agreement is required. This is a master agreement that defines contract terms common to Microsoft Volume Licensing and Services agreement. The MBSA needs to be signed only once with, or prior to, your Enterprise Agreement.

The Enterprise Agreement defines the license terms which apply to all Enrollments. The Enterprise Agreement Enrollments establish the basic information that your organization can use to buy product licenses under the Enterprise Agreement. They define purchasing requirements, ordering rules, billing options and pricing terms. Additionally, they define purchase details like the term of the licensing arrangement, products, and whether or not the Enrollment requires an organization-wide purchase commitment. They also identify the Enrolled Affiliate, included Affiliates, specific Enrollment contacts, and the Enterprise Software Advisor (ESA) or Large Account Reseller (LAR).

#### Additional Documents

The Microsoft Licensing Product Use Rights (PUR) document, which is updated regularly, has additional details regarding use rights for specific Microsoft licensed products acquired through Volume Licensing programs. Updated monthly, the Microsoft Product List for Volume Licensing provides information about Microsoft software and Online Services licensed through Microsoft Volume Licensing programs. *(For a copy of the current Products Use Rights or Microsoft Product List documents, please go to www.microsoft.com/licensing/about-licensing/product-licensing.aspx.)*

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| Microsoft Business and Services Agreement |
| :---: |
| _____ |
| Enterprise Agreement |
| _____ |
| Enterprise Enrollment |
| Enrollment for Core Infrastructure |
| Enrollment for Application Platform |
| Enrollment for Windows Azure |

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## Appendix C: Client Access License Suites

A Client Access License (CAL) is a license granting access to certain Microsoft server software. CALs are used in conjunction with Microsoft Server software licenses to allow users and devices to access and utilize the services of that server software. When licensing CALs, keep the following in mind:

- Microsoft offers two Client Access License (CAL) Suites, the Core CAL Suite (Core CAL) and the Enterprise CAL Suite (ECAL), which provide access rights to a number of server products and online services. When you license CAL Suites through your EA, you do so on a company-wide basis.

- The Enterprise CAL Suite includes all of the components of the Core CAL Suite, along with other CAL Suite components. *(See chart below for CAL Suite components). ***

- You can acquire the Enterprise CAL Suites upfront or as a "Step-up" from the Core CAL Suite. Also, customers acquiring CAL Suites through an EA have Software Assurance, so you can update your CAL licenses as you update your Server products to help ensure proper licensing alignment.****

- Microsoft continues to offer both a per-user and a per-device licensing model when purchasing CALs.

  o With the User CAL, you purchase a CAL for every user who accesses the server to use services such as file storage or printing, regardless of the number of devices they use for that access. Purchasing a User CAL might make more sense if your company employees need to have roaming access to the corporate network using multiple devices, or from unknown devices, or you simply have more devices than users in your organization.

  o With a Device CAL, you purchase a CAL for every device that accesses your server, regardless of the number of users who use that device to access the server. Device CALs may make more economic and administrative sense if your company has workers who share devices, for example, on different work shifts.



*\*CAL Suites component are updated to support features and functionalities of new Microsoft server products and services. Refer to [www.microsoft.com/calsuites](www.microsoft.com/calsuites) for the latest CAL Suite product and licensing information.*

*\*\*Note: When licensing CALs the CAL must be the same or higher version of the server software, meaning if you upgraded to Windows Server 2012, you need to license 2012 Windows Server CAL.*

## Appendix D: Summary of Software Assurance Benefits

The table below offers a summary of available Software Assurance benefits for on-premises software organized by type: *New Products*, *Deployment*, *Training*, *Support*, and *Specialized Benefits*. These benefits can vary depending on the volume and type of licenses (e.g. Windows, Server, or Office) you have purchased under your Enterprise Agreement.

| Benefit | Description | Entitlement Summary |
|---|---|---|
| **New Products** | | |
| New Product Versions | Provides new software version releases so you have access to the latest technology. | Every license covered under Software Assurance may be upgraded to the newest version. |
| Step-Up Licensing Availability | Enables you to migrate your software from a lower-level edition to a higher-level edition, such as Office Standard to Office Professional Plus, at a low cost. | To get a Step-up license, you need a license for the qualifying, lower-level product. For current details, refer to the Microsoft Product List at http://www.microsoft.com/licensing/productlist/. |
| Microsoft Desktop Optimization Pack (MDOP) | Provides a suite of innovative technologies including virtualization, policy control, and diagnostics and recovery tools. | You may subscribe to MDOP when you have active Software Assurance coverage for the Windows desktop operating system.* |
| Windows 8 Enterprise | Offers premium features designed to help meet the mobile productivity, security, manageability, and virtualization needs of today's large organizations. | You are eligible for this benefit when you have active Software Assurance coverage for the Windows desktop operating system, which gives you the option to use Windows 8 Enterprise in place of Windows 8 Pro on that Software Assurance-covered device.* |
| **Deployment** | | |
| Planning Services | Provides structured planning services from Microsoft partners to enable efficient deployments of Microsoft application, system and server products, and cloud services. | You receive a number of Planning Services days based on the number of qualifying Office Application, CAL Suite and Server products with Software Assurance coverage. |
| License Mobility Through Software Assurance | Enables you to deploy certain server application licenses on-premises or in the cloud by assigning your existing licenses to an authorized service provider's server farm. | You may utilize License Mobility when you carry Software Assurance on eligible server application products. |
| Windows Virtual Desktop Access Rights | Allows a licensed device to access up to four virtual instances of Windows running on a server, run up to four virtual instances of Windows locally on the licensed device, remotely access one physical instance of Windows running on a server from the licensed device, and run up to two physical instances of Windows. | You may utilize Windows VDA Rights when you have active Software Assurance coverage for the Windows desktop operating system.* |
| Windows Companion Subscription License | Allows the primary user of the licensed device to access a corporate desktop through VDI or run Windows To Go on up to four personally-owned devices or corporate-owned non x86/64 devices when at work. | You may subscribe to Windows CSL when you have active Software Assurance coverage for the Windows desktop operating system.* |

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| Windows RT Companion VDA Rights | Allows a corporate-owned Windows RT companion device to access a Windows virtual instance running in the data center. | Allows a corporate-owned Windows RT companion device to access a Windows virtual instance running in the data center. |
| Windows To Go Use Rights | Enables IT administrators to provide users with a bootable corporate Windows image that can include line of business apps, settings, and corporate data on a compatible USB storage device. | You may utilize Windows To Go Rights on any device with active Software Assurance coverage for Windows desktop operating system.* |
| Windows Roaming Use Rights | Allows the primary user of the licensed device to access a corporate desktop either remotely through a VDI or via Windows To Go from non-corporate devices such as personally-owned PCs. | You may utilize Windows Roaming Use Rights when you have active Software Assurance coverage for the Windows desktop operating system.* |
| Windows Thin PC | Helps you lower the end point cost for VDI by providing an enterprise ready platform to repurpose existing PCs as thin clients. | You may utilize Windows Thin PC when you have active Software Assurance coverage for the Windows desktop operating system.* |
| Office Roaming Use Rights | Allows the primary user of a licensed device to remotely access Office, Project, and/or Visio via a virtual environment from a third-party device such as a home or contractor-owned PC. | You may utilize Office Roaming Use Rights when you carry Software Assurance for Office, Project, and/or Visio on qualified devices. |
| Enterprise Sideloading of Windows 8 Apps | Gives you the necessary use rights and product keys required to deploy Windows 8 apps directly to devices within your organizations as opposed to being installed through the public Windows Store. | You may utilize the necessary use rights and product keys when you have active Software Assurance coverage for the Windows desktop operating system.* |
| TechNet Benefits through Software Assurance | Gives IT staff access to experts, technical information, plus beta and final versions of products for testing and evaluation. | For each eligible server product with Software Assurance one person within your organization gains access to TechNet's Online Concierge Chat and Managed Forums. You also receive a single complimentary subscription to TechNet Professional Subscription. |
| Microsoft Office Multi-Language Pack | Enables IT to deploy a single Office image with support for 37 languages. | You may use the latest version of the Office Multi-Language Pack for the Office system products you have with Software Assurance. |
| **Training** | | |
| Training Vouchers | Provides in-depth technical classroom training for IT professionals and developers. | You receive a number of Training Days based on the number of qualifying Office and/or Windows operating system licenses covered with Software Assurance. |
| E-Learning | Offers self-paced interactive training designed for end-users, delivered via Internet or Intranet. | For every qualifying license (such as Office Word or Windows OS) covered by Software Assurance, one person in your organization may access E-Learning courses for that product. |
| Home Use Program | Provides employees with the latest version of Microsoft Office for their home computer, via low-cost download. | For each Office application license you have covered with Software Assurance, a user of the licensed PC or device may acquire, at low cost, one copy of that product for use at home. |

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| Support | | |
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| 24x7 Problem Resolution Support | Provides around-the-clock phone and web incident support for Microsoft server and desktop products. | Except for Open License Program, when you have at least one server license covered with SA you get one complimentary phone support incident, plus unlimited web support for eligible server products covered with SA. You are also eligible for an additional phone support incident for every US$200K spent on system and application SA, and for every US$20K spent on server and Client Access License SA. |
| Extended Hotfix Support | Provides specific product fixes on a per customer incident basis, beyond the standard product support. | While annual fees normally charged as part of an Extended Support agreement are waived, to receive this benefit you must have SA coverage for the related product pool and a Premier Support Agreement in place. |
| **Specialized Benefits** | | |
| Cold Backups for Disaster Recovery | Provides licensing for servers used as offline ("cold") backups for disaster recovery purposes. | For each qualifying Server license you have with Software Assurance and related CALs, you may run one instance of the software on a "cold" server for disaster recovery purposes. |
| Enterprise Source Licensing Program | Provides access to Microsoft Windows source code for internal development and support. | To receive this benefit you must have SA coverage for all of your purchases under the systems product pool and have at least 1,500 desktops covered with SA. |
| Spread Payments | Payment for License and Software Assurance may be spread across three equal, annual sums. | Available on all Volume Licensing programs, except Open License. |

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