

Volume Licensing Guide

# Enrollment for Education Solutions (EES)



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# Enrollment for Education Solutions Licensing Guide

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# Enrollment for Education Solutions Licensing Guide

## Introduction

This guide can help you understand the Microsoft Volume Licensing Enrollment for Education Solutions (EES) subscription offering. It is provided for informational purposes only. Your use is governed by the terms of your Microsoft Volume Licensing Agreement and Enrollment if applicable. 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.

The Microsoft Volume Licensing Enrollment for Education Solutions offering provides qualified academic customers, of all sizes, a simplified way to acquire Microsoft software and services under a single, subscription agreement. EES provides assured coverage for desktop platform products through one annual count of employees, the ability to add additional products as needed, student licensing options, and the benefits of Microsoft Software Assurance.

You can obtain EES subscription licenses one of two ways, depending on the size of your organization.

- ▶ Customers with as few as five (5) full-time equivalent (FTE) employees or students can license through an Authorized Education Reseller (AER) by signing the simplified Open Value Subscription Agreement for Education Solutions (OVS-ES), online e-agreement.
- ▶ Larger customers with a minimum of 1,000 FTE employees or students can also license through a Licensing Solution Provider (LSP) (formerly referred to as Large Account Reseller [LAR]) by signing the Campus and School Agreement and the Enrollment for Education Solutions (CASA+EES).

For more information about these purchasing options, please see the [How to Buy](#) section in this document.

## Content Specific to Individual Contract Options

Some of the content included in this document applies only to one of the above options, and we have noted such sections in one of two ways:

1. Marked the section title with “**(CASA + EES Only)**” or “**(OVS-ES Only)**”, for example:

### **Additional Online Services (CASA + EES Only)**

When purchasing through a LSP, you may also order additional Microsoft Online Services (beyond Office 365 plans) through your EES. All Microsoft Online Services licensed through the EES have the same expiration date as the EES. When adding Online Services midterm, the User Subscription License (USL) is prorated to the month. The minimum term length for the services is one month.

### **Purchasing Office 365 through an AER (OVS-ES Only)**

If you are purchasing through an AER and you have met the minimum requirement of ordering at least one desktop platform product for a minimum of 5 FTE employees, you can order user subscription licenses (USLs) for Office 365 Plan A3 and/or Office 365 ProPlus in any quantity. USLs are user-based (not FTE-based), so you order the number of USLs equal to the number of individuals who will use the service. You can order additional USLs at any time.

2. Separated the relevant content for each contract option into a two column table, for example:

<b>OVS-ES CONTRACT OPTION</b> (FOR ORGANIZATIONS WITH FIVE OR MORE FTE EMPLOYEES)	<b>CASA + EES CONTRACTS OPTION</b> (FOR ORGANIZATIONS WITH 1000 OR MORE FTE EMPLOYEES OR STUDENTS, OR 1000 USERS LICENSE FOR A PLATFORM ONLINE SERVICE)
If your organization has five (5) FTE employees or more*, you can subscribe to the EES offer through a Microsoft Authorized Education Reseller by signing an electronic agreement (e-Agreement) called the Microsoft Open Value Subscription Agreement for Education Solutions (OVS-ES). The agreement contains general terms and conditions, program terms and definitions, and is used to provide contact information, define your organization, and enroll in the Student Option. This document also specifies the licensed	If your organization has 1,000 or more FTE employees* (or you are licensing at least one Platform Online Service for at least 1000 users), you can instead subscribe to the EES offer through a Microsoft Licensing Solution Provider (LSP).  <i>*An FTE student count (if you include the Student Option) of 1000 or more also fulfills this minimum requirement. See <a href="#">The Student Option</a> for more information.</i>

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## Academic Volume Licensing Overview

For education customers who license software in greater quantity and manage software across multiple devices, Microsoft Volume Licensing programs can provide the most cost-effective way to acquire licenses.

Microsoft offers both “subscription” and “perpetual” Volume Licensing programs for education customers. This guide covers the subscription licensing. For information on perpetual offerings, please refer to Select Plus for Academic and Open License for Academic volume licensing programs at [Microsoft.com/licensing](http://Microsoft.com/licensing).

### Subscription Licensing

With subscription licensing programs, you have the right to run a selection of products, and any upgrades or downgrades of those products, for a designated term. A subset of products, including specific application, system, and Client Access License (CAL) products, designated by Microsoft as “desktop platform products,” are licensed on an organization-wide basis. For these “desktop platform products,” you place an order for a quantity that is equal to the number of FTE employees in your organization once per year. This way even if the number of devices or users grows, you remain fully licensed throughout the designated term, and you only need to report an increase in the number of your FTE employees on your annual order.

The Enrollment for Education Solutions (EES) provides subscription licensing for primary/secondary and higher education institutions of all sizes. EES offers the simplicity of licensing desktop platform products organization-wide through an annual count of people instead of PCs/devices and the flexibility to add additional products in any quantity.

The Enrollment for Education Solutions offering is explained in detail in this guide.

*Note: The School Enrollment for primary/secondary schools also offers subscription licensing based on counting PCs.*

### Enrollment for Education Solutions (EES) Introduction

Enrollment for Education Solutions is an easy, cost-effective offer that provides qualified academic customers a simplified way to acquire Microsoft software and services under a single, subscription agreement. It offers benefits such as assured coverage for desktop platform products with one annual count of employees, the ability to easily add Additional Products in any quantity, self-service tools for simplified asset management, and immediate access to benefits such as product upgrades through Microsoft Software Assurance so that you can boost the productivity of your faculty and staff and optimize the return on your technology investments. EES offers participating institutions the benefits of the following:

- ▶ **Easy Compliance:** Through the simplicity and predictability of counting FTE employees just once per year, you can be confident you are fully covered for the desktop platform products you selected regardless of yearly fluctuations in employees or devices.
- ▶ **Customized Solutions:** Easily add Additional Products either organization-wide, department-wide, or for individual licenses at any time during your subscription term so that you can deliver the right mix of technology and services to your faculty, staff, and students.
  - A broad selection of Microsoft software products, such as Microsoft Visio drawing and diagramming software, Microsoft Project, Office 365, the Windows Server operating system, and Microsoft Exchange Server are available as additional products through EES.
  - Student Licensing options are also available and provide a convenient and cost-effective way for you to license software and services for your students so that they can collaborate easily and access the software they need.
- ▶ **Simplified Asset Management:** Self-service tools such as the Microsoft Volume Licensing Service Center (VLSC) enable you to easily track and manage your software assets and Software Assurance benefits from one convenient, online location.

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- ▶ **Cloud on Your Terms:** Free\* access to Office 365 Education A2, plus the ability to subscribe to additional Microsoft Online Services through your EES means you have the flexibility to move users back and forth between on-premises software and cloud services, match and adjust online service plans to meet your users' needs, and add and adjust Online Services as needed so you can transition to the cloud on at your pace.

\*No license fee; doesn't include deployment or support costs associated with the service.

- ▶ **Low Administration:** Subscription licensing eliminates the need to track licenses for the selected desktop platform products on every PC, which enables your IT staff to be more productive because they no longer have to track multiple licenses across the organization.
- ▶ **Lower Total Cost of Ownership (TCO):** Realize the maximum value from your licensing investment with included benefits such as access to current technology, Work at Home (WAH) rights for faculty and staff, product evaluation rights, Software Assurance for Microsoft Volume Licensing, and Microsoft Office 365 Education A2.
- ▶ **Student Advantage Benefit:** When you license Office 365 ProPlus or Office Professional Plus organization-wide for all of your faculty and staff employees, you qualify for no-cost Office 365 ProPlus subscription licenses for your students through the EES Student Option.

## Acquiring EES Coverage

Depending on the size of your organization, you can acquire EES subscription licenses through:

- ▶ A Microsoft Authorized Education Reseller (AER) (for organizations with five or more FTE employees or students)
- ▶ A Microsoft Licensing Solution Provider (LSP) (for organizations with 1,000 or more FTE employees or students and organizations ordering at least one Platform Online Service for 1000 or more users)

These resellers are authorized to sell Microsoft academic edition products and volume licenses to qualified education users. To participate in EES or any of our other academic Volume Licensing programs, or to obtain current pricing, please contact an AER or LSP.

- ▶ [Find an AER or LSP in the United States or Canada](#)
- ▶ For other regions, visit your [regional Microsoft Volume Licensing website](#)

## EES Features

### Easy Compliance and Administration

Although you report a faculty/staff FTE employee count when submitting your annual order for on-premises software, all institution-owned or leased devices are licensed to run all products you choose to license organization-wide, during the subscription year. Any new faculty or staff members added to the participating organization during the year are licensed to use the devices running the licensed products.

Your students can also use the licensed product on institution-owned or leased devices located in classrooms or open access labs within your defined organization. To license your students to run products on a device the student either personally owns or is institution-owned and is assigned to an individual student for their exclusive use, you can enroll in the Student Option (see [The Student Option](#)).

### Flexibility for On-Premise, Cloud, and Hybrid IT Environments

EES makes it easy to transition to the cloud on your terms and at your pace. By participating in EES, you are eligible to order Office 365 Education A2 at no license charge for you faculty/staff employees and students. You also have the option to order other Office 365 Education Plans at academic discounts either through your EES or the Microsoft Online Subscription Program. [Get plan details.](#)

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The following individual plans are also available:

- ▶ Exchange Online Archiving for Exchange Online
- ▶ Exchange Online Archiving for Exchange Server
- ▶ Exchange Online Plan 1 for Alumni
- ▶ Exchange Online Plan 2
- ▶ Lync Online Plan 3
- ▶ Office Professional Plus Subscription
- ▶ Office Web Apps with SharePoint Online Plan 2
- ▶ Project Pro for Office 365
- ▶ SharePoint Online Extra Storage
- ▶ Visio Pro for Office 365

**Note:** For a current list of the available plans, refer to the [Microsoft Volume Licensing Product List](#).

## Software Assurance

[Software Assurance](#) is a comprehensive maintenance offering that offers a broad range of benefits to 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. Software Assurance benefits contribute to the return on your technology investment by helping you with budget predictability, minimized downtime, and improved productivity. 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.

Software Assurance benefits are included with your subscription, which not only gives you access to Windows Enterprise, but also now enables flexible work styles by providing access to Windows instances in a variety of ways across devices. With access to the unique offerings and use rights listed below, Software Assurance for Windows provides the maximum value for your investment.

# Enrollment for Education Solutions Licensing Guide

Below is a list of Software Assurance benefits that you may be eligible for based on your EES purchases.

New Products	Deployment	Training	Specialized
<ul style="list-style-type: none"><li>▶ New Product Versions</li><li>▶ Step-Up Licensing Availability</li><li>▶ Microsoft Desktop Optimization Pack (MDOP)</li><li>▶ Windows Enterprise Edition</li></ul>	<ul style="list-style-type: none"><li>▶ License Mobility Through Software Assurance</li><li>▶ Windows Virtual Desktop Access (VDA) Rights</li><li>▶ Windows Companion Subscription License</li><li>▶ Windows RT Companion VDA Rights</li><li>▶ Windows To Go Use Rights</li><li>▶ Windows Roaming Use Rights</li><li>▶ Windows Thin PC</li><li>▶ Office Roaming Use Rights</li><li>▶ TechNet Benefits</li><li>▶ Microsoft Office Multi-Language Pack</li></ul>	<ul style="list-style-type: none"><li>▶ E-Learning</li><li>▶ Home Use Program</li></ul>	<ul style="list-style-type: none"><li>▶ Cold Backups for Disaster Recovery</li><li>▶ Spread Payments</li></ul>

With EES, Software Assurance is included with your software licenses.

For further details, refer to the following:

- ▶ [Academic Software Assurance Benefits Chart \(PDF\)](#)
- ▶ [Software Assurance Benefits Chart \(PDF\)](#)
- ▶ [Microsoft Volume Licensing Product List](#) (most current information on the benefits for which you qualify)

## Licensing Software Products for On-Premises Deployment

The typical way to get started with EES is by licensing software for on-premises deployment. To do so, you must first meet the minimum order requirement. You then have the option to acquire additional software and services for your faculty/staff employees and students.

### Minimum Requirements

To qualify for EES by purchasing licenses for on-premises software, you must meet the following minimum requirements:

1. **Meet the minimum number of FTE employees.\***

If licensing through an AER (OVS-ES contract option), you must have an organization-wide count of five (5) or more FTE employees. If licensing through a LSP (CASA+EES options), you must have an organization-wide count of 1,000 or more FTE employees. (See [below](#) to learn how to calculate your FTE employee count.)

*\*There are two alternative ways to meet this minimum requirement: through a qualifying Student Option order or a qualifying Platform Online Services order. See [The Student Option](#) and [Licensing Microsoft Online Services](#) for details.*

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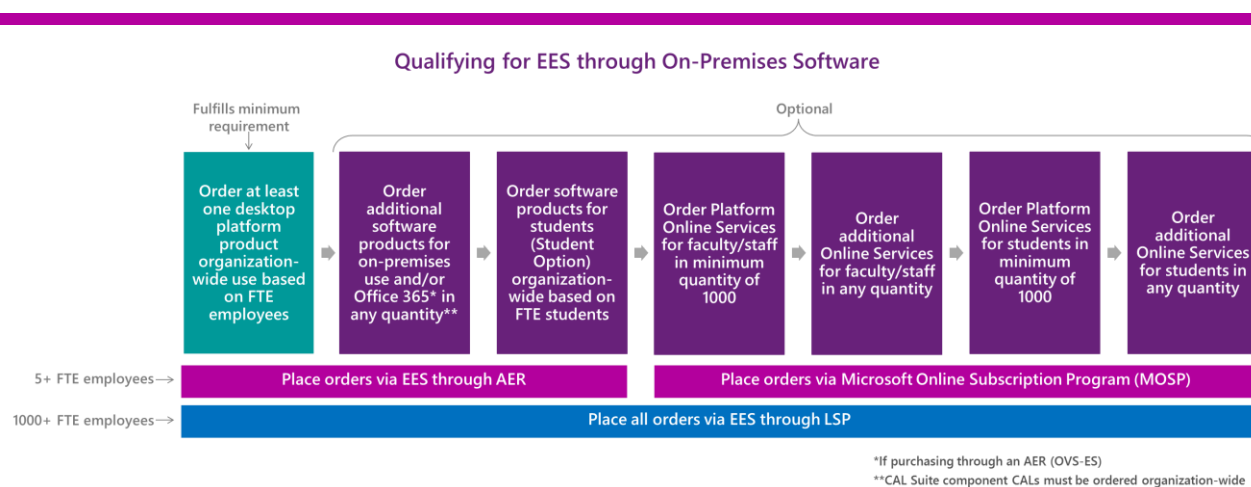
## 2. License at least one desktop platform product.

You must license at least one [desktop platform product](#) for the organization-wide FTE employee count defined in your enrollment or agreement.

You can define your “organization” as:

- ▶ Your entire institution, including all of its affiliates, departments, and school locations.
- ▶ Your institution only, including all of its departments and school locations, but not including any affiliates.
- ▶ Your institution plus named affiliates, departments, school locations, and/or clearly defined user groups.
- ▶ A selected list of departments, school locations, and/or clearly defined user groups, if your institution is a school without departments or school locations.

Refer to your contract documents for legal definitions for defining your organization.



*Qualifying for EES through on-premises software*

## EES Desktop Platform Products

EES offers you access to the most recent releases of the EES desktop platform products\*. One way to participate in EES, you start by choosing at least one of the following desktop platform products that you will license organization-wide. The EES desktop platform products are as follows:

- ▶ Windows Enterprise upgrade
- ▶ Microsoft Office Professional Plus and Office for Mac
- ▶ Office Professional Plus Subscription\*\*
- ▶ Microsoft Core CAL Suite\*\*\* (Includes Windows Server CAL, SharePoint Server Standard CAL, Exchange Server Standard CAL, System Center Configuration Manager Client Management License, System Center Endpoint Protection, and Lync Server Standard CAL.)
- ▶ Microsoft Enterprise CAL Suite\*\*\* (Includes all Core CAL Suite components plus Exchange Server Enterprise CAL with Services [includes Data Loss Prevention and Exchange Online Protection], Exchange Online Archiving, SharePoint Server Enterprise CAL, Lync Server Enterprise CAL, Windows Server Active Directory Rights Management Services CAL, and System Center Client Management Suite)
- ▶ Education Desktop with Core CAL Suite
- ▶ Education Desktop with Enterprise CAL Suite



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*\*The products listed may be replaced by successor products, which in turn will also be considered desktop platform products.*

*\*\*You must order User Subscription Licenses (USLs) for each employee in the organization on a 1:1 basis.*

*\*\*Individual CAL Suite components must be ordered organization-wide, but are not desktop platform products.*

You can select individual EES desktop platform products to license organization-wide or you can license an EES Education Desktop Platform Suite, which combines your Windows upgrade, Microsoft Office, and CAL Suite licenses into one convenient stock-keeping unit (SKU). The Education Desktop Platform Suites offer savings when compared to the cost of licensing each of the included products individually.

The EES Education Desktop platform suites include the following:

EDUCATION DESKTOP WITH CORE CAL SUITE	EDUCATION DESKTOP WITH ENTERPRISE CAL SUITE
Windows Enterprise upgrade	Windows Enterprise upgrade
Microsoft Office Professional Plus and Office for Mac	Microsoft Office Professional Plus and Office for Mac
Microsoft Core CAL Suite	Microsoft Enterprise CAL Suite

**Note:** You cannot substitute Office 365 ProPlus Subscription for Microsoft Office Professional Plus and Office for Mac in the desktop suites.

As with all software products licensed through the EES subscription offering, you can access the most recent releases and choose to deploy downgrade versions (previous versions) in place of the current licensed version. For instance, you can choose to deploy the Windows 7 Enterprise operating system instead of the Windows 8 Enterprise operating system.

For desktop platform products and certain additional products available to be licensed organization-wide, when a product is licensed organization-wide (in a quantity equal to the FTE count), all devices and all users within the organization are fully licensed to use that product in accordance with the Product Use Rights.

## Additional Software Products

For on-premises deployment, a broad selection of software is available as additional products under your EES. They provide the same License & Software Assurance coverage as desktop platform products. With the exception of Core CAL Suite or Enterprise CAL Suite component CALs (which must be licensed organization-wide based on your FTE employee count), the organization can license additional products for any quantity specified, ranging from one license to the entire FTE employee count.

Examples of software products available as additional products include Microsoft Visio, Microsoft Project, Windows Server, and Exchange Server. Examples of CALs available as additional products include the Microsoft SQL Server database software CALs and Microsoft Dynamics CRM CALs. Examples of Online Services include Microsoft Office Live Meeting and Microsoft Forefront Protection for Exchange. You can see a complete list of additional products on the [Microsoft Volume Licensing Product List](#).

When you license additional products organization-wide, the software can be deployed on any institution-owned or leased device, including the institution's labs, and can be used by any faculty, staff, or student belonging to the institution. (Not covered by the organization-wide count are student-owned devices and organization-owned devices that are assigned to an individual student.)

If you choose to license a specific number of copies of the software:

- ▶ **Desktop application licenses are device-based**, meaning for each license you acquire, you can only run the software on one device in accordance with the PUR for the specific product.
- ▶ **CALs are device- or user-based**, meaning you can choose whether to license a device (which can be used by multiple users under a single CAL), or a user (who can use multiple devices under a single CAL).\*

## CALs Licensed Organization-Wide

CALs licensed organization-wide may be assigned as User and/or Device CALs. For each CAL licensed organization-wide, you may assign it as Device CAL to each institution Qualified Desktop and as a User CAL to each faculty and staff member. All

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# Enrollment for Education Solutions Licensing Guide

CALs that are included in the Core CAL Suite or in the Enterprise CAL Suite (for example, Windows Server CAL, SharePoint CAL, Exchange CAL, and so on) must be licensed organization-wide and therefore may be assigned to a user and/or a device.

## CALs Licensed Non-Organization-Wide

CALs that are not licensed organization-wide (for example, SQL Server CAL, Microsoft Dynamics CRM CAL, etc.) may be assigned as either a Device CAL or a User CAL, in accordance with the PUR. Each Device CAL permits one device, used by any user, to access instances of the server software on your licensed servers. Each User CAL permits one user, using any device, to access instances of the server software on your licensed servers. You may use a combination of Device and User CALs.

## Server Products

When you license server products, you license a specific number of copies and you can use the software in accordance with the [PUR](#) for the specific product.

## Licensing Windows Upgrades Through EES

When you license a desktop operating system through this Microsoft Volume Licensing offering, it is important to understand that only the UPGRADE license for Windows is available—FULL operating system licenses are not offered. Prior to licensing a Windows upgrade through your EES desktop platform, you need to have a full underlying license for a qualifying operating system for each PC. (Qualifying operating systems are listed in the [Microsoft Volume Licensing Product List](#).)

You can get the necessary full Windows operating system license in the following two ways:

- ▶ **For newly manufactured PCs**, the best way to acquire that license is to have the original equipment manufacturer (OEM) preinstall Windows on the PC.
- ▶ **If the OEM has not preinstalled Windows on the PC**, then you can purchase a full Windows license through retail full-packaged product (FPP).

If you discover that you have existing PCs that lack the necessary full license for a qualifying operating system, talk to your Microsoft reseller about the Get Genuine Windows Agreement for Academic (GGWA-A). GGWA-A provides a simple, cost-effective way for you to acquire full licenses for Windows 8. These licenses fulfill your requirement for a full qualifying operating system. Once you have acquired the full operating system license, you are then eligible to license those PCs for Windows 8 Enterprise upgrade through EES. [Learn more](#).

## Counting Desktop Platform Product Licenses

EES offers the convenience of licensing desktop software products and CALs based on the number of faculty/staff (FTE) employees in the organization. Licenses for the desktop platform products and certain additional products require organization-wide coverage.

You can define your "organization" as:

- ▶ Your entire institution, including all of its affiliates, departments, and school locations.
- ▶ Your institution only, including all of its departments and school locations, but not including any affiliates.
- ▶ Your institution plus named affiliates, departments, school locations, and/or clearly defined user groups.
- ▶ A selected list of departments, school locations, and/or clearly defined user groups, if your institution is a school without departments or school locations.

## Counting Faculty/Staff Full-Time Equivalent (FTE) Employees

Use the formula below to determine the number of faculty/staff FTE employees you have. You will use this calculation when licensing desktop software and CALs.

*Note: Employees such as maintenance, grounds keeping, and cafeteria staff can be excluded from the faculty/staff FTE employee count if they do not use institutional devices.*

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For example, you have 2,000 full-time faculty, 3,000 part-time faculty, 1,000 full-time staff, and 1,000 part-time staff. The FTE employee count is calculated as follows:

**2,000 + (3000 ÷ 3) + 1,000 + (1000 ÷ 2) = 4,500 FTE employees**

In this case, your desktop platform product licenses would be based on 4,500 FTE employees.

**Note:** If you are outside the United States, the method for counting FTE employees may differ. Contact your local reseller for details.

## Licensing Microsoft Online Services

If you are purchasing through an LSP, you can order any of the available Microsoft Online Services through your EES.

If you are purchasing through an AER, you can order Office 365 Education A3 or Office 365 ProPlus through your EES. You can order additional Online Services (such as Microsoft Dynamics CRM Online and Windows Intune) separately through the [Microsoft Online Subscription Program](#).

**Note:** Refer to the [Microsoft Volume Licensing Product List](#) to confirm currently-available products and services.

### EES Platform Online Services (**CASA+EES Only**)

Platform Online Services must be ordered for a minimum of 1000 users. If you have not already met the minimum requirement for participating in EES through an order for on-premises software, you can use your order for one or more Platform Online Services to fulfill the requirement.

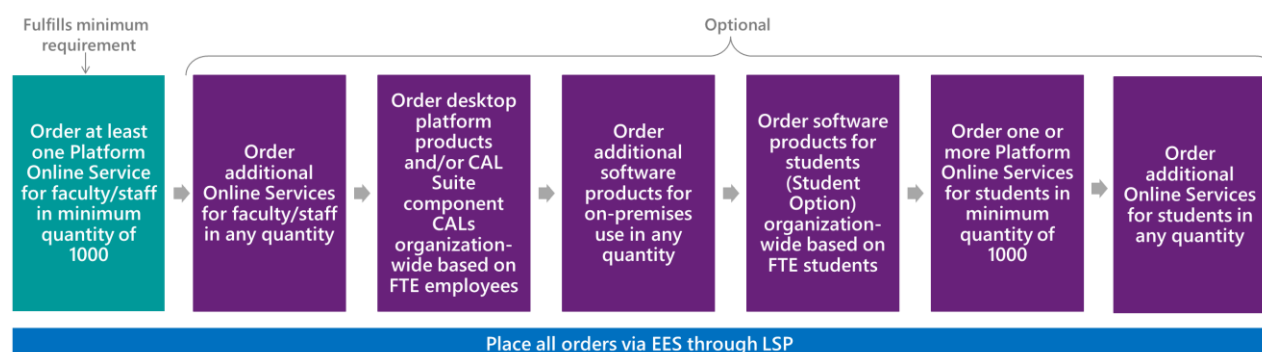
The EES Platform Online Services are as follows:

- ▶ Office 365 Education A3 (includes Exchange Online Plan 2, SharePoint Online Plan 2, Lync Online Plan 2, Office Professional Plus, and Office Web Apps)
- ▶ Office 365 Education A4 (includes everything in Plan 3 and Lync Online Plus voice)

**Note:** If you choose the Student Option, enrolling 1000 or more students in at least one Platform Online Service also fulfills this minimum requirement. See [The Student Option](#) for more information.

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## Qualifying for EES through Online Services for Faculty/Staff Employees (*CASA+EES Only*)



Qualifying for EES through Online Services for Faculty/Staff Employees

### Additional Online Services (*CASA+EES Only*)

When purchasing through an LSP, you may also order additional Microsoft Online Services (beyond Office 365 Education Plans) through your EES. All Microsoft Online Services licensed through the EES have the same expiration date as the EES. When adding Online Services midterm, the User Subscription License (USL) is prorated to the month. The minimum term length for the services is one month.

### Purchasing Office 365 Through an AER (*OVS-ES Only*)

If you are purchasing through an AER and you have met the minimum requirement of ordering at least one desktop platform product for a minimum of 5 FTE employees, you can order user subscription licenses (USLs) for Office 365 Education A3 and/or Office 365 ProPlus in any quantity. USLs are user-based (not FTE-based), so you order the number of USLs equal to the number of individuals who will use the service. You can order additional USLs at any time.

### Office 365 Add-ons (*CASA+EES Only*)

If you have licensed Office Professional Plus and/or the Core CAL Suite or Enterprise CAL Suite for on-premises deployment and you want to take advantage of the additional functionality provided by Office 365, you may do so by adding an Office 365 Add-on. In essence, these Add-ons give you credit for your existing Office Professional Plus and/or CAL Suite investments by allowing you to subscribe to Plan A3 or Plan A4 (if purchasing through a LSP) at a discounted price. The available Add-ons are as follows:

- ▶ A3 Add on from CAL/ECAL + Office Professional Plus
- ▶ A3 Add on from CAL/ECAL
- ▶ A3 Add on from Office Professional Plus
- ▶ A4 Add on from CAL/ECAL + Office Professional Plus\*
- ▶ A4 Add on from CAL/ECAL\*
- ▶ A4 Add on from Office Professional Plus\*

\*Available only when purchasing through an LSP.

## Special Use Rights

### Work at Home Rights

Your institution can offer limited Work at Home (WAH) rights to your faculty and staff members only with no additional license charge. These limited rights permit using application, system, and CAL products on a personally owned device for work-related purposes only. You can choose to extend these rights to your faculty and staff members only for licensed products for which you have institutional licenses through your EES.

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If you extend WAH rights, your institution accepts responsibility for communicating the terms and conditions to your faculty and staff members. This includes keeping accurate records of licensed product use and distribution and ensuring that your faculty and staff agree to the stated terms and conditions.

For your convenience, we have provided a [Faculty/Staff Acceptance Form](#) that you may want to have your users sign when granting WAH rights to them.

Employees who do not use institutional devices, such as maintenance, grounds keeping, and cafeteria staff are excluded from WAH rights if they were not included in the FTE employee count when placing your order.

*\*The school may incur some costs for obtaining and distributing the WAH media.*

## Distributing Media for Work at Home Use

**Electronic software distribution services** are offered by Microsoft's authorized Digital Distribution Service Provider (DDSP). The DDSP sets up a web store for you or your reseller to facilitate delivering software and any keys necessary for activating individual products to your faculty/staff for Work at Home. (You can also use this facility to distribute software to eligible students under the Student Option.) For more information, contact your reseller.

If you do not use this electronic software distribution service, you may distribute software to licensed users in the following ways:

### For All Products (Including Those that Require Activation):

Purchase and distribute one copy of each applicable CD-ROM or disk set to each authorized user. You must purchase these CDs or disk sets (known as "student media") from your reseller in minimum quantities of five (5) per title up to the number of licensed users. You cannot replicate media for Work at Home use.

*Note: Most products, including Windows and Microsoft Office suites, require activation. For those products, you can use the option above which use non-Volume Licensing media and activation keys. You CANNOT distribute Volume Licensing media and Volume License Keys (VLKs) for products that require activation to users for WAH use. [See a complete list of products that require activation.](#)*

### For Products That Do Not Require Activation:

- ▶ **Have users bring in their devices for manual installation** by you at a central location that you control using Volume Licensing media acquired from a Microsoft-approved fulfillment source.
- ▶ **Use a system of controlled short-term checkout** of applicable Volume Licensing media (acquired from a Microsoft-approved fulfillment source) solely for the purposes of individual user installation.

## Home Use Program

In addition to WAH rights, EES also provides your faculty and staff members access to the Microsoft Office system desktop PC programs to use on their personally owned PC through the Home Use Program (HUP). This is a benefit of Microsoft Software Assurance. With HUP, your faculty and staff members can get the Microsoft Office system programs to use on their home PC for both work and personal use at a nominal cost. Providing the HUP licensed product is easy for the institution, because the institution does not have to handle distributing the software. After your Software Assurance benefits administrator activates the benefit, individual faculty and staff members can order and pay for shipping of their licensed product online.

**Note:** Though Microsoft may offer both WAH and HUP rights under Software Assurance for a Product, you must choose either WAH or HUP rights for such Product.

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HUP and WAH availability by product pool:

PRODUCT POOL	HUP	WAH
Applications	X*	X*
Systems		X*
Servers		X*

*\*You cannot provide licensed product for the same title to your faculty and staff using both HUP and WAH.*

[Get information about HUP.](#)

## Multi-Language Rights

During the term of the subscription, you are granted the right to run the licensed product in any available language. This includes the right to run the Multi-Language version of Microsoft Office and its corresponding features, such as a global interface and multi-language proofing tools.

## Upgrade/Downgrade Rights

You are allowed to run any new versions of the licensed products included in your subscription coverage that are released during the licensed term. Additionally, you can run any previous version of the licensed product in place of the current version. These upgrade and downgrade rights also apply to the individual components of the licensed product.

## Product Evaluation Rights

During the term of your subscription, you can also download products for trial purposes. The evaluation bits for certain software products are available for download from the [Volume Licensing Service Center](#). After you receive the product bits, you will have 60 days to evaluate the product, after which you can place a license order or uninstall the software.

Online Services can be evaluated for a 30-day trial via the [Microsoft Online Subscription Program portal](#).

**Note:** To transfer account information from your trial to a paid subscription, you must use the same Windows Live ID for the trial account as the subscription account.

## Additional Benefits

### DreamSpark

With an EES subscription, your institution is eligible to receive an organization-wide, free online subscription of DreamSpark Standard for instructional use by your teachers and students in your classrooms and labs. DreamSpark enables you to outfit your labs with the latest Microsoft developer, design, and server tools to support personal or in-class learning for your students and educators. With a DreamSpark Standard membership, students get the professional-level developer and designer tools they would use to build real sites, apps, and games for Xbox Live/360, Kinect, Windows Phone, and more. DreamSpark enables students to get a head start on a career or do better in class.

DreamSpark Premium is also available for departments that teach Science, Technology, Engineering, or Math (STEM Departments). DreamSpark Premium makes available additional premium design, development, and server tools software as well as additional Microsoft Office applications and Windows client solely for instructional use inside the STEM Departments. DreamSpark Premium is not available for use institution-wide and additional terms and restrictions apply that are found in [DreamSpark Premium use rights](#).

Software acquired through the DreamSpark Standard subscriptions may be used for instructional purposes only and may not be used for commercial purposes or for institution's production use. [See the complete terms and conditions](#).

Information about how to activate your free DreamSpark memberships will be included in your EES welcome letter which you will receive when your enrollment is processed. [Get more information about DreamSpark](#).

# Enrollment for Education Solutions Licensing Guide

While we provide the complimentary membership to customers with an EES subscription, the DreamSpark Standard and DreamSpark Premium membership is completely separate from the EES subscription. The software licenses provided through the DreamSpark membership carry certain restrictions that EES subscription licenses do not. You can use DreamSpark licensed product only for instructional and not-for-profit research purposes within your organization. You cannot use the licensed product to run the infrastructure of your department or institution.

## Microsoft IT Academy

The Microsoft IT Academy Program is an annual subscription-based program designed for accredited academic institutions worldwide. It empowers academic institutions to help students realize their skills and career potential through relevant, high-quality and latest technology training resources. With these resources, educators can prepare their students to enter the workforce with skills that are in demand by employers. The Microsoft IT Academy Program resources are flexible, and easy to integrate into new or existing curricula. And, with today's tighter budgets, they help schools keep pace with technology and save money.

The IT Academy membership is available through the EES offering as a Services Subscription License (SSL). Rather than counting FTE employees, the SSL can be acquired to license the entire institution or department.

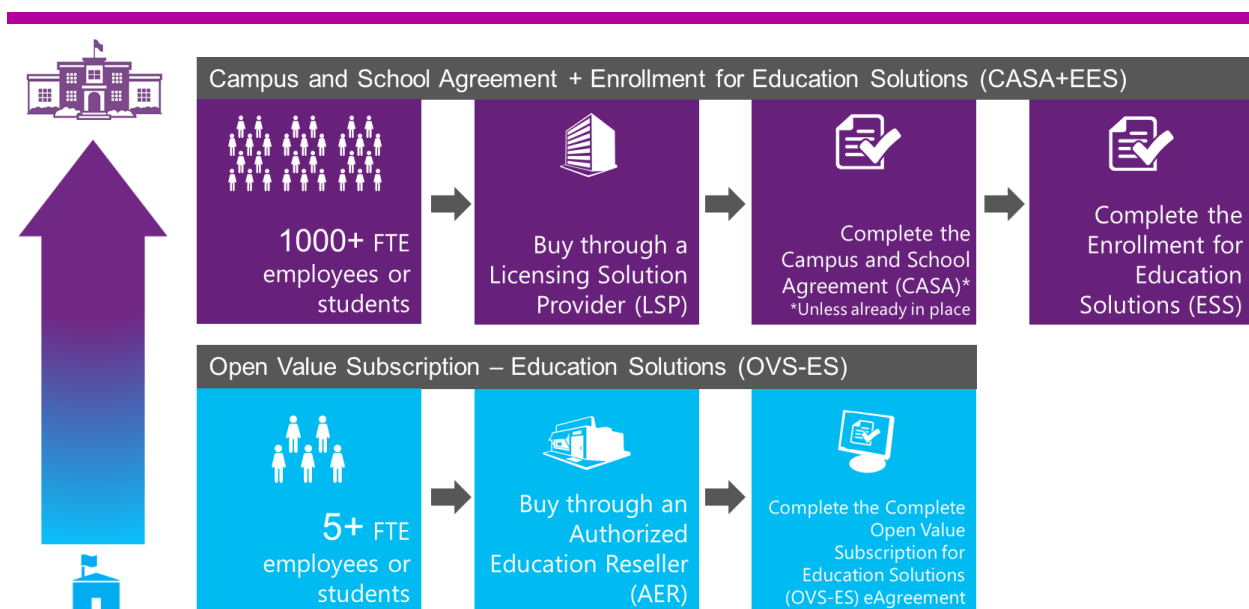
## License Term

The IT Academy membership has the same expiration date as the EES subscription under which it is licensed. When adding IT Academy mid-term, the SSL is pro-rated to the month.

[Get more information about Microsoft IT Academy.](#)

## How to Buy

You can participate in the EES offering in two ways. The best contract option for your organization depends primarily on whether you have five (5) or more FTE employees (Microsoft Open Value Subscription Agreement for Education Solutions [OVS-ES] contract) or 1,000 or more FTE employees (Campus and School Agreement plus Enrollment for Education Solutions [CASA+EES] contracts).



*How to buy depending on organization size*



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# Enrollment for Education Solutions Licensing Guide

## OVS-ES CONTRACT OPTION

(FOR ORGANIZATIONS WITH FIVE OR MORE FTE EMPLOYEES)

If your organization has five (5) FTE employees or more\*, you can subscribe to the EES offer through a Microsoft Authorized Education Reseller by signing an electronic agreement (e-Agreement) called the Microsoft Open Value Subscription Agreement for Education Solutions (OVS-ES). The agreement contains general terms and conditions, program terms and definitions, and is used to provide contact information, define your organization, and enroll in the Student Option. This document also specifies the licensed period (one or three years) and the total FTE count that you will cover in the first annual order. The OVS-ES agreement is designed for smaller academic customers to provide a simplified purchasing experience. The OVS-ES subscription offers comparable benefits to the enrollment under the Campus and School Agreement. The primary difference in the programs is that Office 365 Education A3 and Office 365 ProPlus are the only Online Service available through OVS-ES. Other You can, however, order other Online Services through the [Microsoft Online Subscription Program](#).

*\*An FTE student count (if you elect the Student Option) of five or more also fulfills this minimum requirement. See [The Student Option](#) for more information.*

[Find an AER in the United States or Canada](#), or refer to your [regional Microsoft Volume Licensing website](#) for other regions.

*Note: You will be an "Open Value Subscription" customer and will be referred to and identified as such in communications to you from Microsoft and in Microsoft tools to which you have access.*

## CASA+EES CONTRACTS OPTION

(FOR ORGANIZATIONS WITH 1000 OR MORE FTE EMPLOYEES OR STUDENTS, OR 1000 USERS LICENSE FOR A PLATFORM ONLINE SERVICE)

If your organization has 1,000 or more FTE employees\* (or you are licensing at least one Platform Online Service for at least 1000 users), you can instead subscribe to the EES offer through a Microsoft Licensing Solution Provider (LSP).

*\*An FTE student count (if you include the Student Option) of 1000 or more also fulfills this minimum requirement. See [The Student Option](#) for more information.*

Working with your LSP, you will complete and sign the following documents:

### Campus and School Agreement (CASA)

For organizations with 1,000 or more FTE employees, the EES is an enrollment under the Campus and School Agreement. This agreement contains an overview of the program and general terms and conditions, plus details on such topics as distributing software to licensed users and Work at Home rights. The Campus and School Agreement has no expiration date. After this agreement is in place, you do not have to sign another one when renewing your annual coverage. If your organization has a current Campus Enrollment or School Enrollment under a Campus and School Agreement, you do not need to sign a new CASA; you only need to sign the EES form, which will replace your previous Campus Enrollment or School Enrollment.

### Enrollment for Education Solutions

The Enrollment for Education Solutions form provides an overview of enrollment, includes additional program terms and definitions, and is used to provide contact information, define your organization, and enroll in the Student Option. This document also specifies the licensed period (one or three years) and the total FTE count (for on-premises products) that you will cover in the first annual order.

[Find an LSP in the United States or Canada](#), or refer to your [regional Microsoft Volume Licensing website](#) for other regions.

*Note: You will be a "Campus" program customer and will be referred to and identified as such in communications to you from Microsoft and in Microsoft tools to which you have access.*



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# Enrollment for Education Solutions Licensing Guide

## Additional Orders

Whether you choose the one-year or three-year option, you can place licensed product orders with your reseller at any time during the year after your initial order.

**Note (CASA+EES Only):** When you place an additional order for on-premises software through your LSP (CASA+EES contract option), you will be charged a prorated price based on the number of months remaining in the annual term, with a minimum price of 50 percent of the full annual per-product price. For instance, if you order a product at month three, you will pay for nine months (.75 x the annual per-product price). If you order a product at month nine, you will pay for six months (.5 x the annual per-product price). Proration is not available under the OVS-ES contract, therefore, customers with the OVS-ES contract will be charged the full annual per-product price when placing an additional order midterm.

When placing an additional order for Online Services through your LSP (CASA+EES contract option), you will be charged a prorated price based on the number of months remaining in your EES term, with a minimum price of one month's subscription.

## Extending or Renewing Your EES Coverage

### OVS-ES CONTRACT OPTION

(FOR ORGANIZATIONS WITH FIVE OR MORE FTE EMPLOYEES)

#### Extending Your Coverage

Your institution can extend the temporary licenses after your initial term for one additional three-year term, after which you must complete a new OVS-ES agreement to continue with the program.

With your extension order, you include an updated FTE employee count, any changes to your product selections, and a new FTE student count (if you chose the Student Option on your OVS-ES contract).

If you choose to extend the agreement, the price level will be reset at the start of the extension term based on your organization-wide count at the time that the extension order is placed. Extension orders are subject to the five FTE minimum.

#### Renewing Your Coverage

If you have already extended your coverage for one three-year term, or you want to add coverage for only one year (instead of using the three-year extension), you can do so by submitting a new OVS-ES agreement through your reseller.

### CASA+EES CONTRACT OPTION

(FOR ORGANIZATIONS WITH 1000 OR MORE FTE EMPLOYEES OR STUDENTS, OR 1000 USERS LICENSED FOR A PLATFORM ONLINE SERVICE)

#### Extending Your Coverage

If you have a one-year subscription, your institution can extend the temporary licenses after the first year for an additional one year at a time (up to five times) or for one three-year term, after which you must complete a new EES to continue with the program.

With your extension order, you include an updated FTE employee count, any changes to your product selections, and a new FTE student count (if you chose the Student Option on your EES).

If you have a three-year subscription, your institution submits an anniversary order at the end of year one and year two. At the end of year three, you can extend your EES coverage for an additional one year at a time (up to three times) or once for an additional three-year term by submitting an extension order through your reseller before the expiration of your initial EES subscription term. With your extension order, you can change orders to reflect a new FTE count, product selection, and/or new FTE student count (if you chose the Student Option on your EES). Extension orders are subject to the same EES minimum requirements as your initial EES.

If you choose to extend the enrollment, the price level will be reset at the start of the extension term based on your organization-wide count at the time that the extension order is placed.

#### Renewing Your Coverage

If you have reached the maximum number of EES extensions and you want to continue your coverage, you can do so by submitting a new one-year or three-year enrollment.

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# Enrollment for Education Solutions Licensing Guide

## Discontinuing Your Coverage

If you choose not to extend or renew your EES subscription, you have the following options at the end of your licensed period:

### 1. Purchase perpetual licenses using the Buy-out Option.

If you had three years or more of coverage, you can purchase perpetual licenses for the products and quantities you want to continue using by acquiring discounted “buy-out” licenses offered under the program.

When exercising the Buy-out Option, the following limitations apply:

- ▶ You can purchase perpetual licenses for your on-premises software through the Buy-out Option only for the product(s) covered under your EES enrollment or OVS-ES agreement.
- ▶ The Buy-out Option is not available for products licensed under the Student Option or for Online Services.
- ▶ Devices that were not covered by the subscription cannot be included. For example, if the corresponding subscription is limited to a particular department, perpetual licenses cannot be purchased through the Buy-out Option for devices outside of that department.
- ▶ You can only exercise the Buy-out Option prior to the expiration of your subscription term.
- ▶ For products licensed organization-wide, the buy-out quantity shall be at least equal to the organization-wide count, but shall not exceed the total quantity of devices covered by EES on the date of the buy-out order. For example, during the subscription term, if you have ordered licenses for 1,000 FTEs and have run software on 1,100 devices, during the buy-out, you must purchase at least 1,000 but no more than 1,100 perpetual licenses per applicable product through the Buy-out Option.
- ▶ For additional products that you have licensed non-organization wide, you must acquire perpetual licenses in the lowest total quantity of copies ordered during any of the three 12-month periods immediately preceding expiration of the enrollment or agreement.
- ▶ If you have fewer than three years of EES coverage and want to migrate to perpetual licenses, you can acquire the licenses you need through the Microsoft Volume Licensing Open for Academic or Select Plus for Academic programs.

### 2. Remove the software.

If you do not submit an extension order (after a one-year term) or anniversary order (during a three-year term), and do not sign a new EES or OVS-ES, or exercise the Buy-out Option, you are required to remove all products from every device, and your institution must revert to using the product that you had licenses for prior to the start of your EES coverage.

### 3. Choose a combination.

You can choose a combination of the choices listed above.

For example, you want an additional 12 months of EES coverage for Windows upgrade, perpetual licenses for Visual Studio, and you no longer want to use any of the other products covered under your current enrollment. To obtain this, you can submit a new order for Windows upgrade, purchase perpetual licenses for Visual Studio using the Buy-out Option, and remove the remaining products from all devices.

## Online Service Expiration or Termination

Upon expiration or termination of your online service subscription, you may contact Microsoft and tell whether to do one of the following with your data:

1. Disable your account and then delete the customer data; or
2. Retain your customer data stored in the online service in a limited function account for at least 90 days after expiration or termination of your subscription (the “retention period”) so that you may extract the data.

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# Enrollment for Education Solutions Licensing Guide

If you indicate (1), you will not be able to extract the customer data from your account. If you do not indicate (1) or (2), we will retain the customer data in accordance with (2).

Following the expiration of the retention period, we will disable your account and then delete your customer data. Cached or back-up copies will be purged within 30 days of the end of the retention period.

The online service may not support retention or extraction of software provided by you to run in the online service.

## Deploying Your EES Licensed Software

### Agreement and Order Confirmation

When your enrollment has been processed and activated, you will receive an acceptance letter from Microsoft.

**Note:** You will be referred to and identified as an “Open Value Subscription” (OVS-ES Option) or “Campus” (CASA+EES Option) customer in all communications from Microsoft.) The acceptance letter will include the effective start and end dates of your licensed period, confirmation of your distributor and reseller, and the promotion code for activating your complimentary DreamSpark membership.

With your acceptance letter, you will also receive your Open Value Subscription for Education Solutions Agreement Number (OVS-ES Option) or your Campus and School Agreement and Enrollment for Education Solutions numbers (CASA+EES Option). These numbers are very important because they are required to place orders for CDs with your reseller. You must place all CD orders with the reseller listed on your acceptance letter. If you want to change your reseller, see [Changing Your Reseller](#) in this guide.

Once an order has been processed, you will receive a letter confirming your order with details such as products ordered and agreement details in a summary table, and Microsoft will publish order confirmation information to the Microsoft Volume Licensing Service Center (VLSC). The VLSC is the single location for Microsoft Volume Licensing customers to view their licensing information, download licensed software, find the appropriate product keys, and view a Software Assurance summary. In the VLSC, customers can also view or manage Microsoft Subscriptions, including MSDN Subscriptions, TechNet Subscriptions, and Expression Subscriptions from the [VLSC](#).

You will need a Windows Live ID to access the VLSC.

**Note:** When you access tools such as VLSC, your EES information will be listed under the “Open Value Subscription” program (OVS-ES Option) or “Campus” program (CASA+EES Option).

When you accept your EES subscription order, the contact you identified will have access to the VLSC. Your order confirmation will also include any required Volume License Product Keys, part numbers for your licensed products, product descriptions, and quantities for the products you have ordered.

### Receiving Your Software

The default method for receiving your licensed software is by accessing the software digitally through the [VLSC](#). This aligns to Microsoft’s efforts to reduce our carbon footprint by eliminating the need to produce, package, and store discs.

**Digital by Choice**  **digital by choice**

Through the Digital by Choice initiative, customers have the option to access your licensed software digitally, instead of receiving physical media. By choosing this option, you help Microsoft in our efforts to reduce our carbon footprint by eliminating the need for discs, packaging, and shipping.

**Note:** This is the default choice for all Volume Licensing programs (with the exception of the Microsoft ISV Royalty Licensing Program and Services Provider License Agreement [SPLA]). If you require physical media, you must complete a media order form. Your registered affiliates can choose their own media delivery preference (digital or physical).

### Physical Media

You can order physical media for your licensed software through your reseller. Your reseller sets the cost of physical media.

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# Enrollment for Education Solutions Licensing Guide

## Volume Licensing Product Fulfillment Kits (CASA+EES Only)

If you enrolled for 1,000 or more FTE employees through a LSP (CASA+EES Option) and chose to receive physical media for your licensed software, media kits are customized according to the languages specified on the EES media form. Media is sent at no charge only for the licensed products ordered. The Welcome Kit and Update Kits are automatically provided to the contacts specified on the EES. Use the Product Fulfillment User's Guide website to help you manage the media kit. You can access these site features from the [VLSC](#). You can also download the products from VLSC or order additional media via your designated LSP.

**Note:** Customers choosing the three-year subscription option will receive a Welcome Kit at the beginning of the first year only. Likewise, customers with a one-year subscription will not receive a new Welcome Kit when they extend their subscription using an annual extension order. You can order additional Welcome Kits through your reseller. You will continue to receive media for product updates and upgrades throughout your licensed term through your Update Subscription.

Some products, such as Windows and Microsoft Office include Microsoft Product Activation technology. In order to install these products, you will need to enter a Volume License Product Key. See *Activating Your Products* below for details on finding and using your keys.

**Note:** Microsoft Learning Essentials is only available by downloading from the [VLSC](#).

## Product System Requirements

You can find detailed product information, including system requirements, in the [Microsoft Volume Licensing Product List](#).

## Activating Your Products

Windows product activation is a set of technologies enabling customers to confirm that their copy of Windows is properly licensed. Volume Activation allows enterprise customers to automate the activation process and make it transparent to users. Volume Activation applies to computers that are covered under a Volume Licensing program, and for customers using Volume Licensing media that were first introduced with Windows Vista and have since been enhanced. It is used strictly as a tool for activation, and it is not tied to license invoicing or billing.

## Activation Through Key Management Service and Multiple Activation Key

Key Management Service (KMS) allows organizations to activate computers within customer environment through an internally hosted service (KMS), and Multiple Activation Key (MAK) activates computers on a one-time basis by using the hosted activation services provided by Microsoft. Customers can use either or both key types to activate computers in their environments.

**Note:** You may not provide unsecured access to your KMS machines over an uncontrolled network such as the Internet. Microsoft may prevent further activations, deactivate, or otherwise block the key from activation or validation in the case of unauthorized use or disclosure of MAK or KMS keys. Refer to the "PROPER USE OF KMS" and "UNAUTHORIZED USE OF MAK OR KMS KEYS" sections in the [Microsoft Volume Licensing PUR](#) for specifics.

## Activation Through Microsoft Active Directory

During Active Directory-based activation, any computers connected to the domain and running Windows 8 or Windows Server 2012 (or later versions) will activate automatically during computer setup. These clients stay activated as long as they remain members of the domain and maintain periodic contact with a domain controller.

Learn more about volume activation at [www.technet.com/volumeactivation](http://www.technet.com/volumeactivation).

## Online Services

The activation process for online services depends on the online service and the program under which those online services are purchased.

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# Enrollment for Education Solutions Licensing Guide

## How to activate your Online Services purchased through EES Agreement **(CASA+EES Only)**:

You must first activate a service before you can use it. You can activate the service by using the link provided in your Activation email. Please make sure to choose the right option:

1. **Sign In:** If you have used Microsoft Online Services before and know your Microsoft Online Services ID, choose this option if you wish to retain your previous settings.
2. **Sign Up:** If you haven't used Microsoft Online Services before, select **Sign Up**.

## How to activate your Online Services purchased through OVS-ES Agreement **(OVS-ES Only)**:

1. Please obtain your Product Key from VLSC. The Online Service Activation (OSA) Keys can be found at either of the following locations from the [VLSC](#) Homepage:
  - ▶ **Download & Keys** > find the **Product/Service** name > click **Key**
  - ▶ **Licenses > Relationship Summary** > Click the **License Number** > **Product Key**
2. Copy the Keys and activate Office 365 at <http://www.office.com/setup/365>.

If you are already an Office 365 customer, choose the Sign In option to apply your product key to your existing account. If you have not used Office 365, get started with Office 365 at <http://www.office.com/setup/365>.

## Distributing Media to Faculty and Staff

Institutions that purchase subscription licenses using the EES offering can distribute the licensed product to faculty and staff for installation on covered institution devices using the following methods. You must acquire all installation media from a Microsoft-approved fulfillment source.

1. Load the licensed product on a secured site and have eligible faculty and staff download the licensed product to covered institution devices that they manage.
2. Have faculty and staff bring the licensed devices that they manage to a central location designated by the university and download from the campus network or CDs.
3. Set up a library checkout system for CDs for faculty and staff.
4. Replicate CDs for faculty and staff. (See Replication Rights below.)
5. Purchase individual CDs to distribute to your faculty and staff. You can obtain CD pricing information from your reseller.

For information on distributing media to faculty and staff members for Work at Home use, see the Special Use Rights section of this guide.

## Replication Rights

Your EES subscription allows you to acquire the quantity of media necessary to distribute the licensed product to your users for installation on covered institution devices. This includes the right to replicate media acquired from a Microsoft-approved fulfillment source. All such copies must be true and complete copies (including copyright and trademark notices).

You do not have the right to replicate media for the Student Option or WAH use. For information on acquiring and distributing media to students under the Student Option and teachers and staff under WAH rights, see the Student Option and Use Rights sections of this guide.

## Authorized Replicator

We recommend that you contact a Microsoft Authorized Replicator for assistance. The following Microsoft Authorized Replicator can assist you with CD replication:

Arvato Services Inc.  
29011 Commerce Center Drive  
Valencia, CA 91355

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# Enrollment for Education Solutions Licensing Guide

Tel: (866) 618-0020

Fax: (661) 702-2944

## Administering Software Assurance Benefits

To get the most from Software Assurance, we recommend that you assign responsibility to a Benefits Administrator who will manage your benefits and track benefits consumption at the [VLSC](#). Information on how to access the VLSC and how to receive these benefits is sent to all Software Assurance customers. You can designate a specific person as your Software Assurance benefits administrator on your EES order.

- ▶ [Find additional information about Software Assurance.](#)
- ▶ If you need help using the VLSC, please contact the Support Center at 1-866-230-0560 or [mvlshepa@msdirectservices.com](mailto:mvlshepa@msdirectservices.com) (United States and Canada only). Worldwide VLSC Support Center contact information is available on the VLSC site.

## Education Server Platform Licensing Option

If you are purchasing through the CASA+EES option, you have an additional option that simplifies server licensing. When you license one or more of the CAL Products listed in the table below organization-wide for *all* your faculty, staff, and students, and you license the corresponding Server Platform Product(s), you may run *unlimited* instances of the corresponding Server Products. This option requires licensing a minimum of 1,000 FTE employees *and* 1,000 FTE students.

Server Platform Products licensed under this licensing option may only be used by your licensed faculty, staff and students and by licensed external users using the Server Platform Products for the benefit of your institution.

CAL PRODUCT	CORRESPONDING SERVER PLATFORM PRODUCT	CORRESPONDING SERVER PRODUCTS (FOR UNLIMITED DEPLOYMENT)
SQL Server CAL	SQL Server Platform Academic	SQL Server Enterprise SQL Server Standard SQL Server Business Intelligence Microsoft BizTalk Server (all editions)
Core CAL Suite	Core Server Platform Academic	Windows Server (all editions) Microsoft SharePoint Server (all editions) Microsoft Exchange Server (all editions) Microsoft Lync Server (all editions) Windows Server External Connector
Enterprise CAL Suite	Enterprise Server Platform Academic	Microsoft System Center Datacenter Windows RMS External Connector

**Note:** The products listed may be replaced from time to time by successor products.

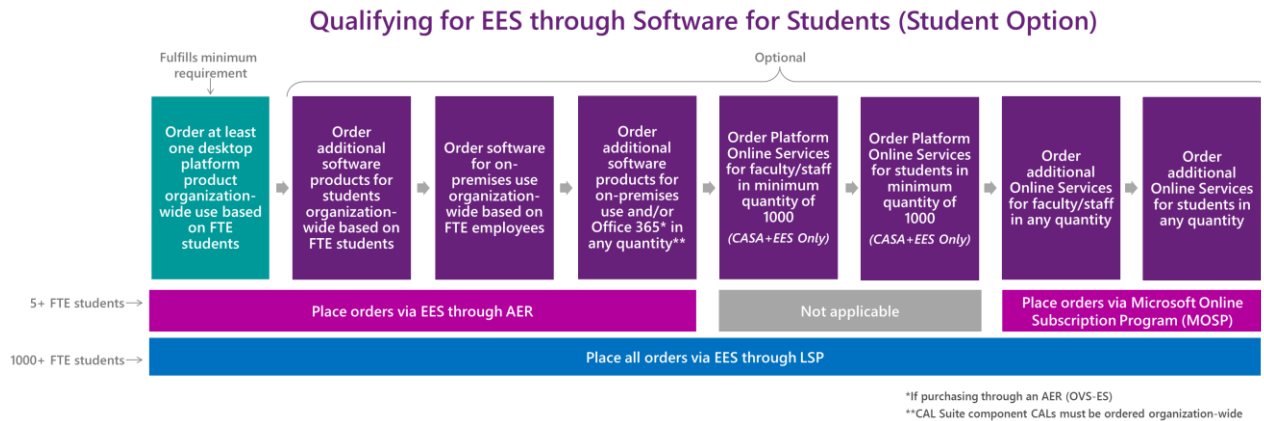
## The Student Option

The EES Student Option provides a convenient and cost-effective way for you to license selected software and services for use by your students on a personally owned device or an institution-owned device assigned to the student's exclusive use (for example, a device checked out to a student for the school year). If you choose the three-year subscription, each anniversary order must include at least the same number of student users as in the year 1 order.

# Enrollment for Education Solutions Licensing Guide

## Getting Started with the Student Option

To get started with EES Student Option, you license at least one desktop platform product or Platform Online Service for an organization-wide FTE student count of five (5) or more.



*Qualifying for EES through software for students*

## Calculating FTE Students

Use the following formula to calculate the number of FTE students in the participating organization:

$$\begin{array}{|c|} \hline \text{Full-time} \\ \text{students} \\ \hline \end{array} + \begin{array}{|c|} \hline \text{Part-time} \\ \text{students} \\ \hline \div 3 \\ \hline \end{array} = \begin{array}{|c|} \hline \text{Total FTE} \\ \text{students} \\ \hline \end{array}$$

Notes:

- ▶ If you are outside the United States, the method for counting FTE students may differ. Contact your local reseller for details.
- ▶ The Student FTE calculation is used for licensing desktop software products and CALs organization-wide for use of the licensed products on a personally owned device or an institution-owned device assigned to the student's exclusive use. It is not used for licensing Online Services. Online Services are licensed per user on a 1:1 basis.

Like with the faculty/staff subscription, you can define your "organization" for purposes of the Student Option as students within:

- ▶ Your entire institution, including all of its affiliates, departments, and school locations
- ▶ Your institution only, including all of its departments and school locations, but not including any affiliates
- ▶ Your institution plus named affiliates, departments, school locations, and/or clearly defined user groups
- ▶ A selected list of departments, school locations, and/or clearly defined user groups if your institution is a school without departments or school locations

## Desktop and CAL Products for Students

### Desktop Platform Products

As with your faculty and staff FTE employees, EES offers the convenience of licensing Student Option products based on the number of FTE students in the organization. All Desktop Platform Products licensed through Student Option require

# Enrollment for Education Solutions Licensing Guide

organization-wide coverage. EES offers you access to the most recent releases of the EES desktop platform products\* for students. The EES desktop platform products are as follows:

- ▶ Windows Enterprise upgrade
- ▶ Microsoft Office Professional Plus and Office for Mac
- ▶ Office 365 ProPlus Subscription\*\*
- ▶ Microsoft Core CAL Suite\*\*\* (Includes Windows Server CAL, SharePoint Server Standard CAL, Exchange Server Standard CAL, System Center Configuration Manager Client Management License, System Center Endpoint Protection, and Lync Server Standard CAL.)
- ▶ Microsoft Enterprise CAL Suite\*\*\* (Includes all Core CAL Suite components plus Exchange Server Enterprise CAL with Services (includes Data Loss Prevention and Exchange Online Protection), SharePoint Server Enterprise CAL, Lync Server Enterprise CAL, Windows Server Active Directory Rights Management Services CAL, and System Center Client Management Suite)
- ▶ Education Desktop with Core CAL Suite
- ▶ Education Desktop with Enterprise CAL Suite

*\*The products listed can be replaced by successor products, which in turn will also be considered desktop platform products.*

*\*\*You must order User Subscription Licenses (USLs) for each employee in the organization on a 1:1 basis.*

*\*\*\*Individual CAL Suite components must be ordered organization-wide but are not desktop platform products.*

You can select individual EES desktop platform products to license organization-wide for students, or you can license an EES Education Desktop platform suite, which combines your Windows upgrade, Microsoft Office, and CAL Suite licenses into one convenient SKU at a price that offers savings when compared to the cost of licensing those products individually.

The EES Education Desktop platform suites include:

EDUCATION DESKTOP WITH CORE CAL SUITE	EDUCATION DESKTOP WITH ENTERPRISE CAL SUITE
Windows Enterprise upgrade	Windows Enterprise upgrade
Microsoft Office Professional Plus and Office for Mac	Microsoft Office Professional Plus and Office for Mac
Microsoft Core CAL Suite	Microsoft Enterprise CAL Suite

**Note:** You cannot substitute Office 365 ProPlus Subscription for Microsoft Office Professional Plus and Office for Mac in the desktop suites.

## Price Levels

Tiered pricing is available for desktop platform products ordered under the CASA+EES contract option. These levels are as follows:

STUDENT FTE COUNT	PRICE LEVEL
1000	A
3000	B
10,000	C
25,000	D

## Notes:

- ▶ There is a single price level under CASA+EES for Online Services
- ▶ There is a single price level under the OVS-ES contract option, which is equivalent to CASA+EES Level A.



# Enrollment for Education Solutions Licensing Guide

## Additional Desktop and CAL Products for Students

A broad selection of additional products is available under the Student Option. They provide the same License & Software Assurance coverage as desktop platform products. All additional products licensed through the Student Option (at student pricing) must be licensed for the organization-wide Student FTE count. Please see the [Product List](#) for a list of products available through the Student Option (denoted by an "ST" in the product table).

**Note:** Additional products available at faculty/staff pricing (for example, those products that are not available at student pricing) can also be licensed for students in any quantity and at the published price. Please refer to the [Product List](#) for a list of additional products.

## Online Services for Students

You have following two options for Licensing Online services for students:

### 1. Student Advantage Benefit

When you license Office 365 ProPlus or Office Professional Plus for all of your faculty/staff FTE employees organization-wide, you are eligible to license Office 365 ProPlus for students within the same defined organization at no additional charge. Order the no-cost Office 365 ProPlus A for Students under the Student Option to receive this benefit.

### 2. Paid Online Services

If you do not license Office 365 ProPlus or Office Professional Plus for all of your faculty/staff FTE employees organization-wide, or you want to license students for Online Services other than Office 365 ProPlus, you have the options detailed below.

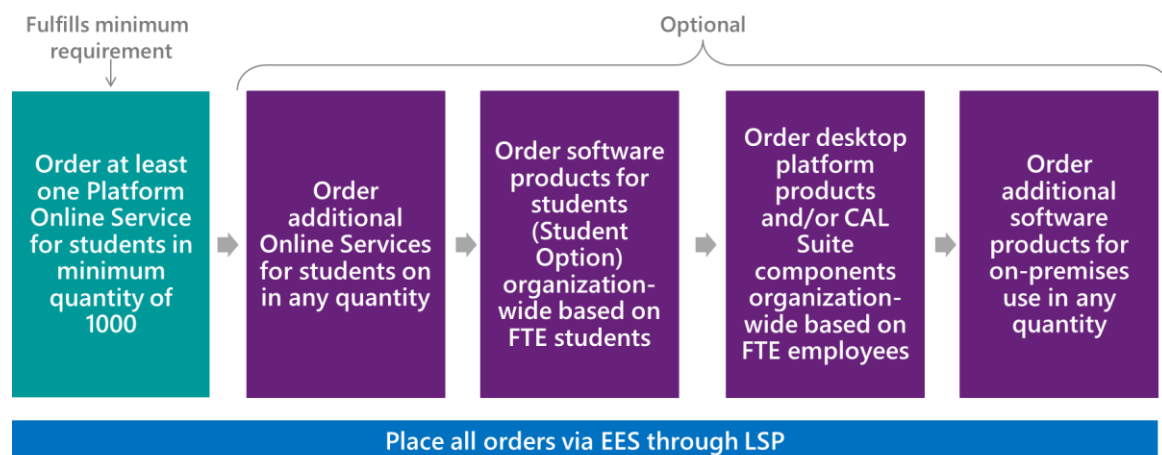
## Ordering Platform Online Services for Students (CASA+EES Only)

When you purchase through a LSP (CASA+EES contract option), you can order one or more of the following Platform Online Services for a minimum of 1000 students:

- ▶ Office 365 Education A3 (includes Exchange Online Plan 2, SharePoint Online Plan 2, Lync Online Plan 2, Office Professional Plus, and Office Web Apps)
- ▶ Office 365 Education A4 (includes everything in Plan 3 and Lync Online Plus voice)

**Note:** An order of one or more Platform Online Services for students can be used to fulfill the minimum requirement for participating in EES.

## Qualifying for EES through Online Services for Students (CASA+EES Only)



*Qualifying for EES through online services for students*

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# Enrollment for Education Solutions Licensing Guide

## Ordering Office 365 Add-Ons

If you have licensed Office Professional Plus and/or the Core CAL Suite or Enterprise CAL Suite for students, and you want to take advantage of the additional functionality provided by Office 365, may do so by adding an Office 365 Add-on. In essence, these Add-ons give you credit for your existing Office Professional Plus and/or CAL Suite investments by allowing you to subscribe to Plan A3 or Plan A4 (through LSP only) at a discounted price. You may order Office 365 Add-ons in any quantity.

The available Add-ons are as follows:

- ▶ A3 Add on from CAL/ECAL + Office Professional Plus
- ▶ A3 Add on from CAL/ECAL
- ▶ A3 Add on from Office Professional Plus
- ▶ A4 Add on from CAL/ECAL + Office Professional Plus\*
- ▶ A4 Add on from CAL/ECAL\*
- ▶ A4 Add on from Office Professional Plus\*

\*Available only when purchasing through a LSP (CASA+EES contract option).

## Ordering Office 365 for Students through OVS-ES

Under the OVS-ES contract option, you can order Office 365 Education A3, Plan A3 Add-ons, or Office 365 ProPlus for students on a per-user basis.

## Ordering Additional Online Services through CASA+EES

Beyond Office 365 Education Plans, you may also order additional Microsoft Online Services for students (such as Microsoft Dynamics CRM Online and Windows Intune) through the CASA+EES contract option. All Microsoft Online Services licensed through the CASA+EES have the same expiration date as the EES. When adding Online Services midterm, the User Subscription License (USL) is prorated to the month. The minimum term length for the services is one month. You may order these additional Online Services in any quantity.

**Note:** If you are purchasing through and AER (OVS-ES contract option), you can order additional Online Services for students separately through the [Microsoft Online Subscription Program](#).

## How to Enroll in the Student Option

How you enroll in the Student Options depends upon which EES contract option you use:

- ▶ **OVS-ES Contract Option:** Complete an OVS-ES e-agreement specifically for students. This is separate from your OVS-ES e-agreement for faculty and staff.

**Note:** You may include your student and faculty/staff on a single OVS-ES agreement if you order the same desktop platform products for students and faculty/staff.

- ▶ **CASA+EES Contract Option:** Include Student Option on the same enrollment as your faculty and staff.

**Note:** You may qualify for the CASA+EES contract option with either a faculty/staff FTE employee count of 1000 or more, an FTE student count of 1000 or more, or by subscribing to one or more Platform Online Services for at least 1000 users. You may not combine your faculty/staff and student counts to meet this minimum requirement.

## Obtaining and Distributing Student Media

To help make it simple and cost effective to provide software for your students, Microsoft provides free **electronic software distribution services** through an authorized Digital Distribution Service Provider (DDSP). The DDSP sets up a web store for you or your reseller to facilitate delivering software and any keys necessary for activating individual products to your licensed students. Free phone- and email-based activation support is also provided to students by the DDSP. For more information, contact your reseller.

If you choose to not take advantage of the free electronic software distribution service, you may distribute software to licensed users in the following ways:

### For All Products (Including Those that Require Activation):

Purchase and distribute one copy of each applicable CD-ROM or disk set to each authorized user. You must purchase these CDs or disk sets (known as "student media") from your reseller in minimum quantities of five (5) per title up to the number of licensed users. You cannot replicate media for Work at Home use. For a list of products for which CDs or disk sets are currently available, please contact your reseller.

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**Note:** Most products, including Windows desktop operating system and Microsoft Office, require activation. For those products, you can use the option above, which use non-Volume Licensing media and activation keys. You *may not* distribute Volume Licensing media and Volume License Keys (VLKs) for products that require activation to Student users or for WAH use. [Find a complete list of products that require activation.](#)

## For Products That Do Not Require Activation:

1. **Have users bring in their devices for manual installation** by you at a central location that you control using Volume Licensing media acquired from a Microsoft-approved fulfillment source.
2. **Use a system of controlled short-term checkout** of applicable Volume Licensing media (acquired from a Microsoft-approved fulfillment source) solely for the purposes of individual user installation.

## Student Use Rights

The terms of your license agreement governs your student licensed product use. The Microsoft Volume Licensing Product Use Rights, which are published quarterly, provide additional details regarding current use rights for specific Microsoft products acquired through Volume Licensing programs. For a copy of the current PUR, please go to [www.microsoft.com/licensing/about-licensing/product-licensing.aspx](http://www.microsoft.com/licensing/about-licensing/product-licensing.aspx).

Students are only licensed to use the product during the subscription term. These licenses are non-perpetual (meaning the student does not own the license). On leaving the school or expiration of the EES, students are required to remove the licensed product (unless the student has graduated). Your institution is responsible for communicating the appropriate use rights to students when distributing the licensed product.

Guidelines for facilitating compliance are outlined in the EES contracts' subscription terms and conditions. Provided that your institution follows these guidelines, you will not be held responsible for students' failure to remove the licensed product.

## Perpetual Use Rights for Graduating Students

On graduation, graduate students licensed under the Student Option can be granted perpetual use rights for the current version of the licensed products as of graduation. "Graduate" means a student has completed (i) a grade or a level in a school or an educational institution that qualifies the student for enrollment into college or university, or (ii) a diploma or degree from college or university. To transfer perpetual use rights, you must provide each graduate with a license agreement and must secure from the graduate his or her acceptance of the terms of the license agreement. On accepting the license agreement, the graduate's right to run the products identified in the license confirmation becomes perpetual. *These rights do not apply to access licenses, including CALs, or to Online Services.*

## Changing Your Reseller

If for some reason you want to change your reseller, you can select a new one. You are responsible as the customer to drive the change of reseller process from start to finish. To do so, complete, sign, and submit a Change of Channel Partner form to Microsoft. Detailed instructions are included on the form. You can [download the form for your region and language](#).

## Redistribution of Software Updates to Students

From time to time, we can make available to the general public additional or replacement code of any portion of our licensed products without a fee, which we refer to as "Software Updates." To help academic Volume Licensing customers provide a more secure technology environment, you are allowed to redistribute these Software Updates to your students even if you have not included the Student Option. With these rights, you can better manage the electronic distribution of Software Updates within your networks.

You can redistribute Software Updates to your students in the following ways:

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1. **By electronic means** provided that your method is adequately licensed and incorporates access control and security measures designed to prevent modification of the Software Updates and prevent access by the general public.
2. **By physical means** provided that you acquire authorized copies on fixed media from a Microsoft-approved fulfillment source.

**Note:** You cannot replicate the Software Updates onto CDs or other media for distribution to students.

Additional terms and limitations apply to the redistribution of Software Updates. For complete details, refer to your Campus and School Agreement or OVS-ES Agreement.

## Additional Resources

### Locating an Authorized Education Reseller (AER)

To find an AER in the United States or Canada, use our search tool at [www.microsoft.com/education/en-us/buy/licensing/Pages/resellers.aspx](http://www.microsoft.com/education/en-us/buy/licensing/Pages/resellers.aspx).

### Software Assurance

Learn more about the Software Assurance benefits you receive as an EES customer in [http://download.microsoft.com/download/0/0/3/0039F316-45CF-4083-AA6E-C35DA9D25C1B/SA\\_Customer\\_Academic\\_Benefits\\_Chart.pdf](http://download.microsoft.com/download/0/0/3/0039F316-45CF-4083-AA6E-C35DA9D25C1B/SA_Customer_Academic_Benefits_Chart.pdf).

### Microsoft Volume Licensing Service Center (VLSC)

Track licenses, access Volume License Keys, download software, and administer Software Assurance benefits at <https://www.microsoft.com/licensing/servicecenter/>.

### Microsoft DreamSpark

Find information about the DreamSpark program at <http://dreamspark.com>.

### TechNet

You can find a wealth of how-to details on evaluating, deploying, maintaining, and supporting Microsoft technology at [technet.microsoft.com/](http://technet.microsoft.com/).

### Volume Licensing for Education Customers

For a complete list of licensing options for education customers, visit our website at <http://www.microsoft.com/licensing/licensing-options/for-industries.aspx#tab=2> or contact a reseller.

### Microsoft Online Subscription Program

Learn about Online Services, including Office 365, and start a trial subscription at [www.microsoft.com/online](http://www.microsoft.com/online).

### Microsoft IT Academy

Find out more about the opportunities for students, faculty, and staff through the Microsoft IT Academy at [www.microsoft.com/education/MSITAcademy/default.aspx](http://www.microsoft.com/education/MSITAcademy/default.aspx).

### Electronic Software Distribution (ESD)

To sign up for ESD, contact your Channel Partner, who can manage this on your behalf.

## Glossary

### Academic Edition (AE)

Microsoft products available for purchase by Qualified Education Users.

### Authorized Education Reseller (AER)

Reseller that is authorized to sell licenses for Microsoft Academic Edition products and Volume Licensing programs.

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## **Buy-Out Option**

Option in EES by which customers can stop running products on a subscription basis on expiration of the enrollment and purchase perpetual licenses for products they want to continue using.

## **CAL (Client Access License)**

License permitting the user to access a Microsoft server.

## **Deploy**

Install and use the licensed products as permitted in a license agreement.

## **Downgrade**

Any version of a licensed product that was released prior to the most recent version (for example, Word 2007 is a downgrade of Word 2010).

## **DreamSpark**

Online subscription providing labs with the latest Microsoft developer, design, and server tools to support personal or in-class learning for your students and educators.

## **Fulfillment**

Process by which media is obtained.

## **EES**

The new subscription licensing offering from Microsoft available to qualified education customers with as few as five FTE. Customers with five or more FTE can acquire the EES subscription through an AER by signing the OVS-ES agreement. Customers with 1,000 or more FTE can acquire the EES subscription through a LSP by signing the CASA+EES contracts.

## **Full-time Equivalent (FTE)**

Calculation of the population size that equates a combination of full- and part-time faculty/staff or students to the equivalent number of full-time employees or students.

## **Licensing Solution Provider (LSP)**

Reseller who is qualified to sell licenses through Microsoft Select Plus, Enterprise Agreement, and CASA+EES.

## **Media**

Storage device (typically CD-ROM) that contains the files needed to install a software program.

## **Non-perpetual License**

License granting the rights to run a software program for a limited period of time.

## **Open License for Academic**

Specialized version of the Microsoft Open License program through which perpetual licenses can be purchased by academic institutions of any size through a reseller.

## **Perpetual License**

License granting the rights to run a specific version of a program for an unlimited period of time.

## **Product List**

Document published monthly that provides information about Microsoft software and Online Services licensed through Microsoft Volume Licensing programs, including product availability, point or unit values, migration paths, and Software Assurance benefits.

## **Product Use Rights (PUR)**

Part of the Microsoft license agreements that outlines the rights the customer and its users have to deploy, use, and copy specific Microsoft licensed products.

## **Qualified Education Users**

Customers who are permitted to purchase academic Volume Licensing agreements or Academic Edition products by meeting a set of criteria (see [www.microsoft.com/education/en-us/buy/Pages/eligible.aspx](http://www.microsoft.com/education/en-us/buy/Pages/eligible.aspx) for criteria in the United States).

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## **Replication**

Making a copy or copies of software media (for example, burning a CD).

## **Reseller**

Third-party vendor that sells Microsoft licenses for Microsoft products, including licenses sold through Microsoft Volume Licensing agreements.

## **Select Plus for Academic**

Specialized version of Microsoft Select Plus through which perpetual licenses can be purchased by qualifying institutions through a Licensing Solution Provider (LSP).

## **Software Assurance**

Software Assurance is an offering for Microsoft Volume Licensing customers. It provides you with the ability to spread out payments annually and gives you licensed product upgrades, support and tools, and training.

## **User Subscription License (USL)**

Licenses a user to access Microsoft Online Service.

## **Student Employee**

Student of an institution who is employed by the institution in a full- or part-time position.

## **Student Option**

Option in EES by which an institution can license its students for use of a selection of licensed products on a personally owned or leased device or an institution-owned or leased device designated for a student's exclusive use.

## **Subscription Licensing**

Licensing programs that grant the rights to use licensed products for a specified period of time (temporary licenses).

## **Temporary License**

License granting the rights to run a software program for a limited period of time.

## **Update Subscription**

Subscription service through which EES customers automatically receive CDs for new versions of the products included in the Welcome CD Kit and new products.

## **Upgrade**

A more recent version of a product (for example, Windows 8 is an upgrade of Windows 7).

## **User**

The institution and the faculty, staff, and students of the institution or institutions that are designated on the OVS-ES Agreement or EES enrollment form under the CASA agreement to run the licensed product. Users must also be Qualified Education Users (see [www.microsoft.com/education/en-us/buy/Pages/eligible.aspx](http://www.microsoft.com/education/en-us/buy/Pages/eligible.aspx) for criteria in the United States).

## **Volume Licensing Service Center (VLSC)**

Self-service tool where customers can access and manage their Microsoft software and services licenses, Software Assurance benefits, subscriptions, and product downloads.

## **Work at Home Rights**

Set of limited rights that academic institutions can offer to their faculty/staff granting permission to use certain Microsoft products on a personally owned or leased device for work-related purposes only.

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