Microsoft

Enterprise Agreement
Program Guide
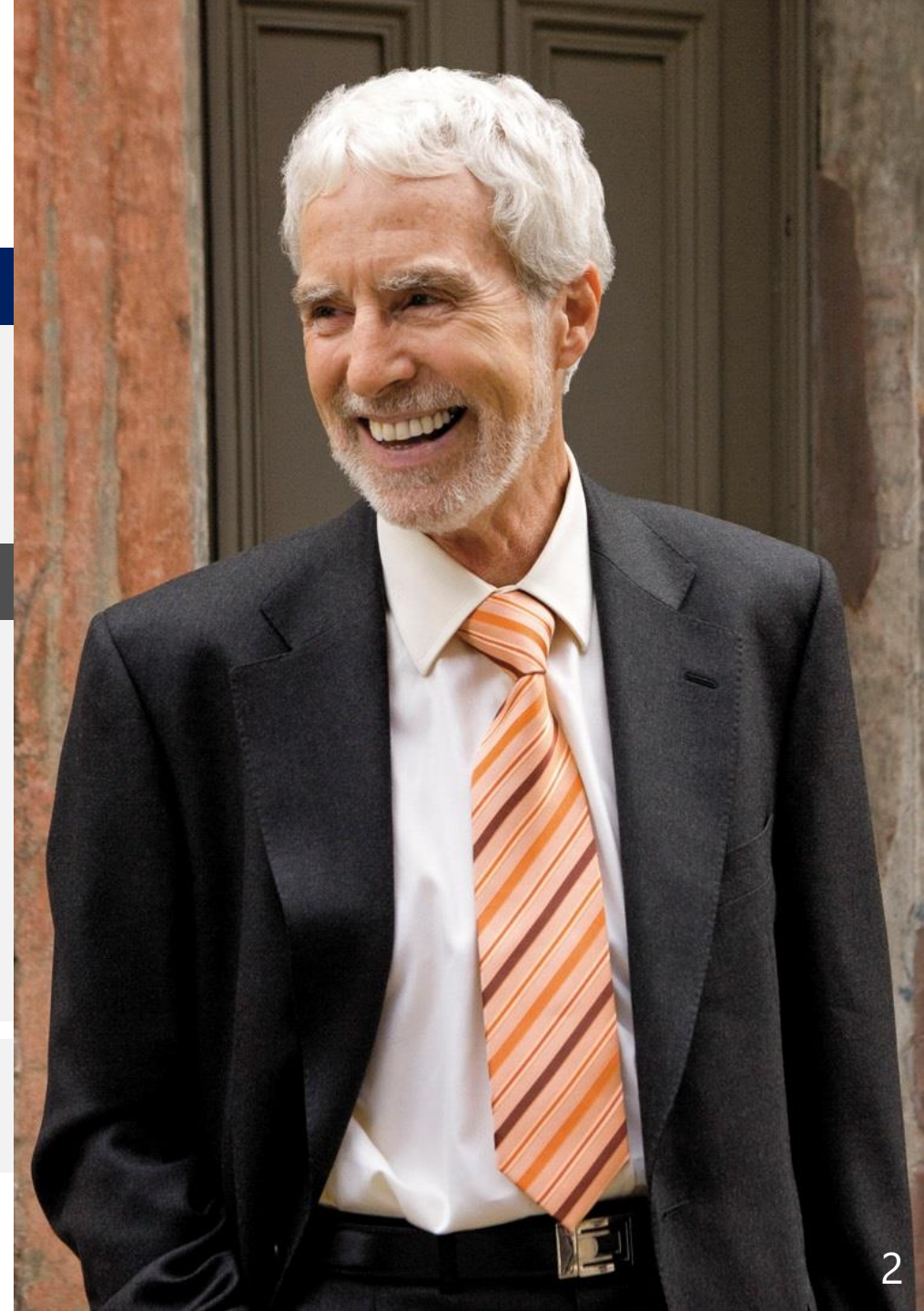Updated December 2016

Executive summary

What is this guide?

This program guide provides an in-depth overview of the Enterprise Agreement and how it works. It is designed to be an ongoing resource to customers throughout the life cycle of their Enterprise Agreement.

Who is this guide intended for?

- Customers who are considering buying an Enterprise Agreement and are looking for more details about how it works.
- Customers who have just bought an Enterprise Agreement and are looking for guidance on how to manage their agreement over the life cycle of the Enterprise Agreement .
- Customers who have an Enterprise Agreement who have specific questions about aspects
  of the agreement.

Please note: This program guide will be updated periodically.
Please check back frequently to get the latest version.

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Enterprise Agreement

The rapid pace of technological change creates both opportunities and challenges for today's organizations. This change is driving organizations around the world to make decisions about whether they will embrace the cloud as a reality today, empower the flexible work styles employees are demanding, or work on a strategy to harness the rapidly growing volume of data that is available to help drive business decisions.

Microsoft understands that technology licensing can help or hinder organizations that need the agility to respond to these technological opportunities. That is why the Microsoft Enterprise Agreement offers the best value to organizations that want a manageable volume licensing program that gives them the flexibility to buy cloud services and software licenses under one agreement in response to the changing technology landscape.

Best value

Maximize your investment in Microsoft technologies with best pricing and benefits.
- Get the best savings by deploying a common IT platform across the organization.
- Get 24x7 technical support, planning services, end-user, and technical training, as well as unique technologies with Software Assurance.
- Minimize upfront costs and budget more effectively by locking in pricing and spreading payments over three years.

Flexible

Respond to the changing technological landscape by accessing the latest versions of cloud and on-premises software.

- Meet the unique requirements of your organization based on its size and technology needs.
- Automatically access the latest software and technologies with Software Assurance.
- Choose from Microsoft cloud services, on-premises software, or a mix of both and migrate on your own terms.

Manageable

Streamline license management with a single organization-wide agreement.
- Simplify purchasing with predictable payments via a single agreement for cloud services and/or software.
- Track purchases centrally and manage licenses with online management tools.
- Manage licensing throughout the life of your agreement with the help of a Microsoft Certified Partner or representative.

Discount levels for all Enterprise Products and Enterprise Online Services

Discounts - devices / users

$

A — 2,399 and below*
B — 2,400–5,999
C — 6,000–14,999
D — 15,000 and up
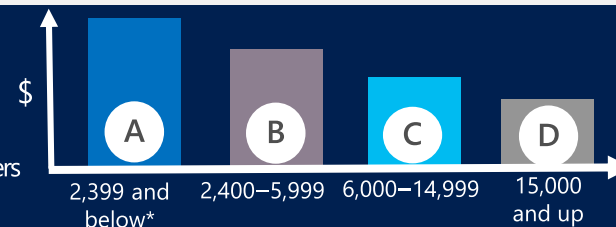
The Enterprise Agreement offers savings ranging from 15% to 45% off Select Plus pricing

*500 minimum user/device requirement is for commercial customers effective July 1, 2016. Does not apply to Server and Cloud Enrollment (SCE). The minimum requirement for public sector customers is 250 users/devices.

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Term and structure

The Enterprise Agreement is designed for organizations with at least 500* users and/or devices that want to license software and cloud services for a minimum three-year period.

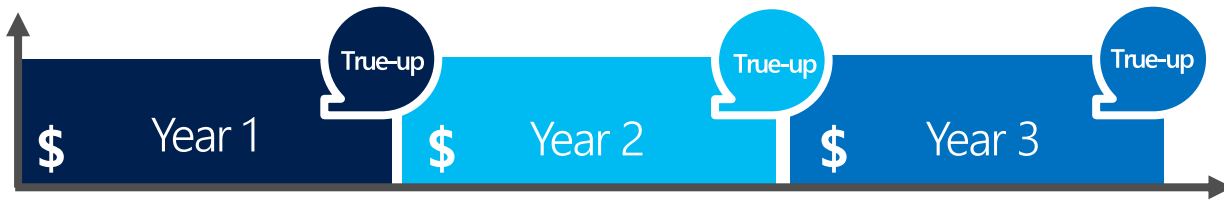True-up $ Year 1 True-up $ Year 2 True-up $ Year 3

The Enterprise Agreement is three-year agreement that allows you to forecast software technology costs up to three years in advance. You can also take advantage of greater flexibility in managing technology expenditures with the option to make three annual payments instead of one upfront payment. This option helps reduce initial costs and helps you forecast annual software budget requirements.

True-up

The True-up supports business growth by giving you the flexibility to add cloud services, software, users, and devices to the Enterprise Agreement when needed, at pre-agreed terms and pricing, without having to report or order each time. The True-up is an annual inventory of products, services, users, and devices added during the year.

Built-in savings

The program offers savings ranging from 15% to 45% as well as comprehensive Software Assurance benefits. You get additional savings and benefits if you buy one or more Enterprise Agreement Enrollments.

New product versions

With your Enterprise Agreement, you automatically gain access to new software versions of licensed products as soon as they are released, and for no additional cost through your Software Assurance benefits.

Step-up availability

With Step-ups, you can upgrade from a lower- to a higher-level edition at a low cost. Rather than pay full cost for the higher-level software edition, you pay only the pricing difference with Step-ups, and you can still take advantage of enhanced features and technologies with premium editions.

Agreement structure

Microsoft Business & Services Agreement

Enterprise Agreement

Enterprise Enrollment

Server & Cloud Enrollment

Eliminate budget constraints with Microsoft Financing

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

With Microsoft Financing, you can craft a customized payment plan to meet your needs by selecting from a range of flexible payment options, including:

Monthly, quarterly, or semi-annual spread payments: Avoid a large upfront investment by spreading low, equal, and predictable payments over 12 to 60 months.

Deferred payments: Defer making your first payment for up to 6 months, allowing you to begin deploying and benefitting from your IT investments immediately, and then pay when your budget becomes available.

Ramped payments: Manage cash flow more strategically by matching payments to staged technology deployment—paying less initially and more in the later stages of the roll-out, while ramping down legacy technology at the same time.

With Microsoft Financing, you can:

- Make software purchases through a payment structure that aligns to your budget, cash flow, or deployment schedule.
- Add new products, upgrades, True-ups, or consulting services to an existing agreement outside of normal budget cycles, at any time.
- Take advantage of total solution financing for complete software, services, and hardware solutions, including non-Microsoft products.

*500 minimum user/device requirement is for commercial customers effective July 1, 2016. Does not apply to Server and Cloud Enrollment (SCE). The minimum requirement for public sector customers is 250 users/devices.

Enterprise Agreement enrollments

Enrollments are a cost-effective way to license Microsoft solutions to meet organizational objectives and offer additional savings and benefits.

The enrollment structure includes additional built-in discounts and allows for the easy addition of new products, services, and licensing options to better support future licensing and deployment scenarios.

Enterprise Enrollment: Get the best value when you buy Microsoft end-user technologies on a per user, per device, or hybrid basis. You can also simplify license management and get true per user licensing when you add the Secure Productive Enterprise.

Server and Cloud Enrollment (SCE): Commit to one or more server and cloud technologies from Microsoft and receive best pricing, cloud-optimized licensing options, and simplified license management.

Subscription Enrollment: For companies that want to subscribe to, rather than buy, Microsoft product licenses.

The Enterprise Enrollment

The Enterprise Enrollment allows committed customers to standardize broadly on the latest versions of Office, Windows, and/or Client Access License (CAL) Suites. In return for making an enterprise-wide commitment, you receive a range of benefits, including best pricing and terms, user/device or hybrid licensing options, and simplified license management. Moreover, the Enterprise Enrollment lets you choose whether to deploy cloud services and/or on-premises software across your organization.

You also have the flexibility to maintain a mix of on-premises and online services to suit user needs, and you can move from on-premises licensing to equivalent online services such as the Secure Productive Enterprise suite as business priorities change. Such organization-wide implementations help you reduce device and user management and support costs, and they provide additional pricing advantages above the Enterprise Agreement's standard volume pricing levels. Get additional savings when you buy an Enterprise Platform and Secure Productive Enterprise suite within the Enterprise Enrollment.

Enterprise Enrollment products and platforms

Enterprise Products include on-premises licenses for Microsoft core PC and device products, namely Windows operating system, Office Professional Plus, 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 the Enterprise Platform. The Secure Productive Enterprise suite is now also available as a User Subscription License (USL) or as an Add-on to the Enterprise Platform.

Enterprise Platform
Per device/hybrid

Office Professional Plus
Enterprise CAL Suites
Windows Enterprise

Note: All Windows operating system licenses provided under the Enterprise Agreement are upgrade licenses. This means you'll need a base Windows operating system license on those devices for which you plan to use a Windows upgrade license. You can choose to upgrade to Windows Enterprise operating system.
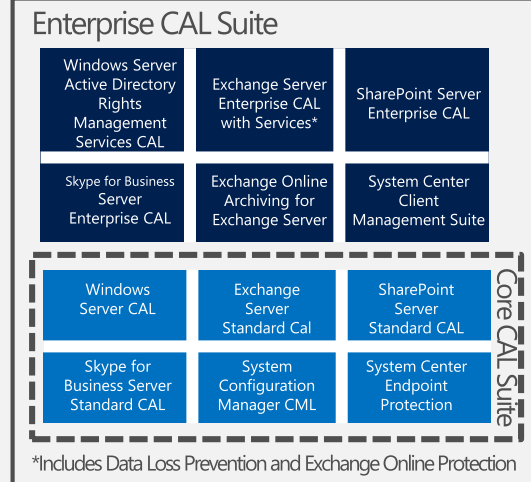**Note:** With either Desktop Platform you may add the Microsoft Desktop Optimization Pack (MDOP) to help streamline deployment and device management.

CAL Suites

A Client Access License (CAL) grants 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 you license CAL Suites through your Enterprise Agreement, you do so on an organization-wide basis.

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

Enterprise CAL Suite

Windows Server Active Directory Rights Management Services CAL	Exchange Server Enterprise CAL with Services*	SharePoint Server Enterprise CAL
Skype for Business Server Enterprise CAL	Exchange Online Archiving for Exchange Server	System Center Client Management Suite
Windows Server CAL	Exchange Server Standard Cal	SharePoint Server Standard CAL
Skype for Business Server Standard CAL	System Configuration Manager CML	System Center Endpoint Protection

Core CAL Suite

*Includes Data Loss Prevention and Exchange Online Protection

Enterprise Enrollment | **Server & Cloud Enrollment** | Subscription Enrollment

Server and Cloud Enrollment (SCE)

SCE is an enrollment under the Microsoft Enterprise Agreement that enables you to standardize broadly on one or more key server and cloud technologies from Microsoft. In exchange for making an installed-base commitment to one or more components of Server and Cloud Enrollment, you receive the best pricing and terms, plus other benefits including cloud-optimized licensing options and simplified license management.

Best value: Get the best pricing and terms for server and cloud products, including discounts on new licenses, Software Assurance, and Microsoft Azure. You get full Software Assurance benefits for all deployed licenses, including new version rights. Unlimited Problem Resolution Support is included for qualifying customers.

Flexible: SCE offers an easy on-ramp to the cloud because Microsoft Azure is automatically available when you enroll in any of the other three components and it can also be licensed standalone. Application license mobility to the cloud is available through Software Assurance. Under the Microsoft Azure Hybrid Use Benefit ("HUB"), a customer with Windows Server Licenses covered with Software Assurance may be uploaded to and use its own Windows Server image on Microsoft Azure. SCE also includes subscription-based licensing to give you more flexibility when you need to retire workloads, consolidate, or migrate to the cloud.

Manageable: Take advantage of simplified licensing management through standardization to streamline overall deployment and management. SCE also offers standardized terms, conditions, and discounts as well as a standardized management platform across on-premises and Microsoft Azure when you commit to the Core Infrastructure Suite (CIS) in SCE.

SCE components:

Core Infrastructure	Application Platform	Developer Platform	Microsoft Azure
Products CIS SKUs (Windows Server + System Center)	**Products** SQL Server	**Products** Visual Studio Enterprise Visual Studio Test Professional MSDN Platforms	**Products** All Microsoft Azure Cloud Services
Requirements CIS coverage for all Windows Servers	**Requirements** Full Software Assurance coverage	**Requirements** Full Software Assurance coverage	**Available automatically** Can also be licensed standalone

+ Access to Microsoft Azure

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 Enrollment, allowing you to more easily support 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.

Commitment on use

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). Although 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 buy products through your Enterprise Agreement.

How it works

To enroll, an installed-base—wide commitment, or a monetary commitment in the case of Microsoft Azure, is required to one or more of the four SCE components. The following are also required:

• **Enterprise Agreement:** Although you need to sign an Enterprise Agreement, an Enterprise Enrollment for Desktop is not needed to qualify.

• **Annuity coverage:** 100% Software Assurance or Subscription coverage is required on your installed base for each product family that you commit to. This includes those licenses that were not covered by Software Assurance when you entered the program.

Learn more about SCE by downloading the SCE Program Guide.

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Enterprise Enrollment   Server & Cloud Enrollment   **Subscription Enrollment**

Enterprise Agreement Subscription Enrollment

The Enterprise Agreement includes a Subscription Enrollment option for organizations that want to subscribe to, rather than buy, Microsoft product licenses.

The Subscription Enrollment provides similar advantages to those of the other Enterprise Agreement Enrollments and gives you 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 the other Enterprise Agreement Enrollments, in which you retain perpetual use rights for the licenses that you buy, with the Enterprise Subscription Enrollment 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 you choose to acquire perpetual licenses through the Enrollment's "buy out" option.

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 Enterprise Agreement by using the standard purchasing process, or as in the case of Office 365 and Microsoft Intune and Enterprise Mobility + Security, by moving users from Enterprise Products to comparable Enterprise Online Services.

Enterprise Online Services

These are services that are designated as Enterprise Online Services in the Product Terms. 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 Enterprise Agreement you can move select on-premises licenses (Enterprise Products) to comparable cloud services (Enterprise Online Services) over the life of the Enterprise Agreement. As an example, you might move workers to cloud services in one division or one department at a time. To support this move, rules have been established to help you move users to Office 365 and Enterprise Mobility + Security services, and to help ensure that you do not pay twice for similar capabilities.

Finally, if at a future date you want to move users back to on-premises software bought 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 Product Terms. Additional Online Services include an array of cloud platform and services that you can buy through your Enrollments as needed, similar to how you buy 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 basis.

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 data centers. As such, Microsoft Azure offers a range of cloud computing, data management, and networking services that utilize consumption-based, per unit billing models. When it is purchased through your Enterprise Agreement, volume pricing discounts are available and apply to both your initial annual monetary commitment level and any additional Microsoft Azure service capacities that you may add throughout your Enterprise Agreement.

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Software Assurance

Software Assurance is included with the Enterprise Agreement and provides a range of benefits to help you take full advantage of your investments in IT. A comprehensive program that includes a unique set of technologies, services, and rights to help deploy, manage, and use Microsoft products efficiently, Software Assurance keeps you up to date and ready to respond quickly to changes, new challenges, and opportunities. For details about the range of Software Assurance benefits available, visit www.microsoft.com/softwareassurance.

Key advantages of Software Assurance include:
- Rights to new software releases and cost-efficient upgrades to help reduce software and services costs.
- Structured consulting engagements to plan for deployment of new on-premises and cloud-based IT initiatives.
- Access to unique technologies and use rights to help support improved operational efficiency.
- Instructor-led technical training for IT pros and online learning for end-users to help boost productivity.
- Ways to spread payments over time to help align budgets.

Software Assurance benefits at a glance

Training
Training Vouchers
Online E-Learning
Home Use Program

Support
24x7 Problem Resolution Support
Extended Hotfix Support
System Center Global Service Monitor
Back-up for Disaster Recovery

Deployment and management	
Planning Services	Windows Enterprise Sideloading
Microsoft Desktop Optimization Pack (MDOP)	Enhanced Edition Benefits Windows/Windows Embedded
Windows Software Assurance per User Add-on	Enterprise Source Licensing Program
Windows Virtual Desktop Access Rights	License Mobility Through Software Assurance
Windows RT Companion VDA Rights	Passive Secondary Instance for SQL Server
Windows To Go Use Rights	Office Roaming Use Rights
Windows Thin PC	Microsoft Azure Hybrid Use Benefit

Support and consulting services

Premier Support Services

Gain the most benefit from your IT infrastructure by pairing your business with Microsoft Services Premier Support. Our dedicated support teams provide continuous hands-on assistance and immediate escalation for urgent issues, which speeds resolution and helps you keep your mission-critical systems up and running. We help you evaluate your IT health and provide the training and tools your teams need to "get healthy and stay healthy."

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

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

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 Enterprise Agreement. In addition to supplying access to the 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.

ESP provides you access to an annually allocated Microsoft Enterprise Architect, and other services throughout the term of your Enterprise Agreement, as described in the Product Terms. There are three different service offerings (Connect, Foundation, and Portfolio) but no concept of a True-up for ESP. Instead, additional capacity may be bought through a Capacity Add-On option.

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Managing your Enterprise Agreement

Adding cloud services & products

Throughout your Enterprise Agreement term you can 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 that 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 can 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 want to have experts help you devise and implement a Software Asset Management plan. (*See the Microsoft Software Asset Management website for more details.*)

Tracking CALs

The Microsoft Assessment Planning (MAP) Toolkit features an IT-based Software Usage Tracker functionality that 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 the MAP Toolkit.*)

Product fulfillment through the 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. The VLSC helps you manage your Enterprise Agreement purchases with licensing information through the Licensing Summary and the Relationship Summary.

- **Licensing Summary:** You can use the VLSC to view current and past Microsoft License Statements across programs and agreements.
- **Relationship Summary:** The 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 Microsoft account when accessing the VLSC.

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

Product keys: The 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) subscriptions.

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

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Managing your Enterprise Agreement

Managing cloud services

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

Cloud Services

- Use the Microsoft Account for Organizations Portal to administer your Office 365, Microsoft Intune, Enterprise Mobility + Security, 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 Microsoft Azure Enterprise Portal to manage your accounts, configure rules and settings for various Microsoft Azure services, and generate reports.
- Use Microsoft System Center to manage both public and private Microsoft cloud implementations. The comprehensive management capabilities of System Center enable it to monitor and manage your entire IT infrastructure stack from traditional physical servers, virtualized servers, virtual machines, and running workloads, all the way up to service-based cloud components.

Using Software Assurance

PLAN · DEPLOY · USE
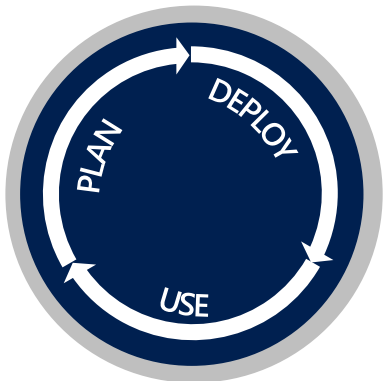
Whether you want to plan for upcoming deployments, get 24x7 support, or give employees access to training, you will need to claim your Software Assurance benefits through the Volume Licensing Service Center (VLSC).

After you are signed in to the VLSC, you will follow different steps depending on the specific benefit that you want to use. A guide for claiming and using each benefit is posted on the Software Assurance website. *(See the Software Assurance website for more details.)*

Software Assurance credit

Microsoft may choose to provide Software Assurance credit to address an overlap in Software Assurance coverage when renewing Software Assurance from one Enrollment or Registration Form, prior to expiration of that Software Assurance coverage, into a new or existing Enterprise Enrollment.

As this credit is applied in terms of a discounted price to the Software Assurance under the new order, a Customer (direct model) or Channel (indirect model) Price Sheet from Microsoft is required. Furthermore, because Software Assurance credit is not programmatic, Microsoft may choose to not provide credit at its discretion.

Requirements

- Enterprise Agreement Enrollments (perpetual licenses) only
- Microsoft must pre-approve
- You must have at least one month of credit
- Credit is applied for same products/versions only
- Credit cannot exceed 35 months
- Only Software Assurance is credited; License payments are not prorated
- No termination of original/initial Software Assurance obligations

How it works

- Microsoft-generated CPS documents pricing
- Amendment required for indirect Enterprise Agreement Enrollments
- Software Assurance prorated monthly based on new Software Assurance net price (after discounts, if any)
- All credit is applied to year 1 on a per product basis
- Any credit in excess of zero unit price year 1 is applied to year 2 and subsequently to year 3 if applicable

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Managing your Enterprise Agreement

True-up: annual reconciliation

Over the life of your Enterprise Agreement, you can equip additional hardware, devices, or users with software and online services that you've already licensed, and then account for these changes through an annual reconciliation process known as True-up. If you have an Enterprise Subscription Enrollment, 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 Enterprise Agreement licenses to account for the total number of licenses that you've added in the previous 12 months. This effort culminates in an order that you place (or an Update Statement that 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 30 to 60 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.)*

Renewing enrollments

Although Microsoft and customers often talk about renewing an Enterprise Agreement, technically, renewal decisions are made for individual Enrollments.
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 Enterprise Subscription Enrollment, 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.

Why True-up

Buy only what you need and use what you have

- When needed, buy additional quantities of software and services at pre-negotiated pricing and terms.
- Pay only for what you need rather than potentially overestimating what is needed just to be safe.
- Reduce procurement costs by issuing only one purchase order a year.
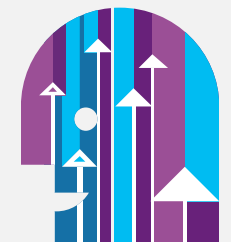
Respond to changing business needs by accessing the latest technologies from Microsoft when needed

- Respond to business growth by adding or removing* software, devices and users as needed without having to place individual purchase orders.
- Easily provision new online services as needed through License Reservation and reconcile annually.
- Optimize your licensing program and plan more strategically for future investments.

Simplify purchasing and license management through a single annual order

- Make an annual self-assessment to identify licenses and services in use and identify new needs.
- Easily manage compliance by ensuring that licensing is current and accurate each year.
- Work with your account team or Microsoft Certified Partner as they help define the best solutions for your organization and help manage your agreement.

*Available with the Enterprise Subscription Enrollment

True-up	True-up	Renew
Year 1	**Year 2**	**Year 3**	**Year 1**

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.

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 website 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 Licensing Solutions Provider (LSP).
- 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
If you are affiliated with an academic, government, or charitable organization, there are additional Volume Licensing programs available to you that 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

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GLOSSARY OF LICENSING TERMS

Add-on: An Online Service that supplements a customer's on-premises license.

Additional Product: Any Product identified as such in the Product Terms. Additional Products are not Enterprise Products and do not meet the initial commitment requirements.

Country of usage: An Enrolled Affiliate must specify the countries where Licenses will be used.

Customer: The entity that has entered into an Enterprise Agreement with Microsoft.

Customer Price Sheet (Direct Enterprise Agreement only): The written statement containing an Enrolled Affiliate's Product and Services initial order, pricing, and billing terms.

Effective Date: If an Enrolled Affiliate is renewing their Enrollment, the effective date will be the day after the prior Enrollment expires. Otherwise, the effective date will be the date an Enrollment is accepted by Microsoft.

Enrolled Affiliate: An entity, either the Customer or any one of Customer's Affiliates, that has entered into an Enrollment under the Enterprise Agreement.

Enrollment: The document that an Enrolled Affiliate submits under the Enterprise Agreement to place orders for Products and Services.

Enterprise: The Enrolled Affiliate and any Affiliates it chooses to include on its Enrollment.

Enterprise Commitment: If an Enrolled Affiliate orders any Enterprise Products, then the Enrolled Affiliate's must coverage all Qualified Users or Qualified Devices with at least one Enterprise Product or Online Service.

Enterprise Mobility + Security: A suite of Online Services consisting of Intune, Azure Active Directory Premium, Windows Server CAL, Advance Threat Analytics, Information Protection, and Cloud App Security.

Enterprise Online Service: An Online Service that satisfies the commitment requirement. Enterprise Online Services are designated in the Product Terms.

Enterprise Product: Enterprise Products must be licensed for all Qualified Devices and Qualified Users on an Enterprise-wide basis under this program. Enterprise Products are designated in the Product Terms.

Expiration Date: The date upon which the Enrollment expires.

Extended Payment Terms: Payment terms that allow for monthly, quarterly, semi-annual, or customized structured payments, as well as modified payment timing on standard payment terms. Depending on Enrolled Affiliate's location, Enrolled Affiliate may have the ability to request Extended Payment Terms for an order.

Extended Term: If Enrolled Affiliate does not renew their Enrollment prior to the Expiration Date, access to Online Services will automatically continue month-to-month.

L&SA: A License with Software Assurance for any Product ordered.

License: The right to download, install, access, and use a Product. A License may be available on a fixed-term or subscription basis. Licenses for Online Services are Subscription Licenses.

License Reduction: An Enrolled Affiliate may reduce the quantity of Subscription Licenses at the enrollment anniversary date on a prospective basis, if permitted in the Product Term.

Office 365: A suite of Online Services including Office 365 Pro Plus, Exchange, SharePoint, Skype for Business, and Yammer.

Product: All products identified on the Product Terms, such as all software, Online Services, and other web-based services, including pre-release or beta versions.

Product Selection Form: A form that documents the Enterprise Products and Enterprise Online Services the Customer is purchasing.

Qualified Device: Any device that is used by or for the benefit of an Enterprise.

Qualified User: A person (e.g., employee, consultant, contingent staff) who uses a Qualified Device, or who accesses a server using an Enterprise Product CAL or Enterprise Online Service.

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GLOSSARY OF LICENSING TERMS

QuickStart Reservation: A License Reservation for an Online Service on which a Customer has not already locked pricing and/or Customer is not cloud-ready with appropriate Online Service terms and conditions included in their agreement.

Reseller: Large account representative authorized by Microsoft to resell Licenses under the Enterprise Agreement and engaged by an Enrolled Affiliate to provide pre- and post-transaction assistance related to the Enterprise Agreement.

Reserved License: For an Online Service identified as eligible for True-ups in the Product Terms, the License reserved by Enrolled Affiliate prior to use and for which Microsoft will make the Online Service available for activation.

Secure Productive Enterprise Add-on USL: Subscription for an Online Service that supplements a customer's on premise license. It includes Enterprise Mobility + Security, Office 365, and Windows per User subscription.

Secure Productive Enterprise USL: A per user suite including Enterprise Mobility + Security, Office 365, and Windows per User subscription.

Software Advisor: An entity authorized by Microsoft and engaged by an Enrolled Affiliate to provide pre- and post-transaction assistance related to this agreement.

Software Assurance: An offering by Microsoft that provides new version rights and other benefits for Products as further described in the Product Terms.

Step-up License: Enrolled Affiliate may move to a higher edition or suite of a Product by purchasing a Step-up License.

True-up Eligible: An Enterprise Agreement customer can equip additional hardware, devices, or users with software and online services that they have already licensed, and then account for these changes through an annual reconciliation process known as True-up.

USL: User Subscription License, usually for an Online Service.

Windows per User: A Subscription License for Windows.

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ENTERPRISE AGREEMENT FREQUENTLY ASKED QUESTIONS

What is the Enterprise Agreement?
The Microsoft Enterprise Agreement offers the best value to organizations with 500* or more devices that want a manageable volume licensing program that gives them the flexibility to purchase cloud services and software licenses under one agreement in response to the changing technological landscape.

How is the Enterprise Agreement structured?
The Enterprise Agreement is a three-year agreement, which allows you to forecast software technology costs up to three years in advance.

What do I buy with an Enterprise Agreement?
With the Enterprise Agreement, you are able to purchase Microsoft end-user products and online services as well as server and cloud technologies. Take advantage of enrollments within your Enterprise Agreement:
- Enterprise Enrollment: Get the best pricing, per user/device or hybrid licensing options, and simplified license management for end-user technologies from Microsoft.
- Server and Cloud Enrollment (SCE): Get the best pricing, cloud-optimized licensing options, and simplified license management when you buy one or more server and cloud technologies from Microsoft.

How much flexibility do I have to make changes to my Enterprise Agreement during the term?
The Enterprise Agreement gives you the flexibility to add or remove** additional cloud services and software at pre-agreed terms and pricing to the agreement when needed without having to report or order each time.

How do I account for these changes?
The Annual True-up allows you to take an inventory of additional products and services used during the year without having to report or order each time.

What happens at the end of the three-year term?
At the end of the third year, you will work with Microsoft to renew your Enterprise Agreement for another three years. Renewing a Microsoft Enterprise Agreement gives you the best value while allowing you to build on existing investments, respond to a changing technological landscape, and maintain a higher level of engagement with Microsoft.

Can I sign up for an OLS-only Enterprise Agreement?
Yes, you may establish an OLS-only Enterprise Agreement with a minimum of 500 Subscription Licenses for Enterprise Online Services in a single pool.

Must I include all of my affiliates under an Enterprise Agreement, or can I select which affiliates will be part of the Enterprise Agreement for purposes of defining the enterprise?
No. When you formulate your Enterprise for purposes of an Enterprise Agreement, you define which entities will be included.

When purchasing Additional Products under an Enterprise Agreement, are there any minimum quantity requirements?
No. When you purchase Additional Products under an Enterprise Agreement, there are no minimum quantities required. You may purchase any quantity.

Can I spread payments for my initial order, or do I have to pay for the initial order all upfront?
For your initial order under your Enterprise Agreement, you have the option to pay for it all upfront or to pay for it in installments

When are my True-up orders required?
Your first two True-up orders are required 60 to 30 days prior to your Enterprise Agreement enrollment anniversary, and your final True-up order is required within 30 days of your enrollment end date.

If I currently have an Enterprise Agreement with Office, Windows, and Core CAL, and I am interested in purchasing some OLS licenses for Office 365 for one department, do I have to purchase the OLS on a organization-wide basis?
No. In this case you may purchase incremental additional OLS licenses and still maintain your initial Professional Desktop commitment.

When I renew my Enterprise Enrollment, what do I own?
After your final payment(s) has been made for your Licenses and Software Assurance, you will own perpetual licenses to the then-latest version of the software. When you renew, you will then be paying for Software Assurance-only for that license.

*500 minimum user/device requirement is for commercial customers effective July 1, 2016. Does not apply to Server and Cloud Enrollment (SCE). The minimum requirement for public sector customers is 250 users/devices.
**Available with the Enterprise Subscription Enrollment

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SERVER AND CLOUD ENROLLMENT FREQUENTLY ASKED QUESTIONS

What is the Server and Cloud Enrollment (SCE)?

The Server and Cloud Enrollment (SCE) is a licensing vehicle under the Microsoft Enterprise Agreement that enables customers to standardize on one or more Microsoft Server and Cloud technologies. To enroll in an SCE, customers make an installed-base–wide commitment to one or more components. This means committing to full Software Assurance coverage across the installed base of an SCE component.

How does SCE work?
Enrolling in SCE requires the following:
- Enterprise Agreement: Although you need to sign an Enterprise Agreement, an Enterprise Enrollment for Desktop is not needed to qualify.
- Annuity Coverage: 100% Software Assurance or Subscription coverage is required on your install base for each product family that you commit to. This includes those licenses that were not covered by Software Assurance when you entered the program.

With SCE, the following occurs:
- For licenses with continuous Software Assurance coverage, Software Assurance can be renewed upon entrance to the program at a discount.
- For the licenses that did not have Software Assurance, you can subscribe to the most current version of the product.
- For incremental licenses bought during the agreement term, you receive additional price savings on L+SA.

What does SCE mean for Enrollment for Core Infrastructure (ECI) customers?
These changes do not affect an ECI customer during the term of the Enrollment. With an installed-base–wide commitment to the Core Infrastructure Suites (CIS) through SCE, ECI customers will retain access to the best pricing, new subscription options, new Microsoft Azure benefits, and access to the latest technologies. New benefits like System Center Azure management rights and the ability to qualify for unlimited support are also included. SCE provides a 15% discount on License + Software Assurance and 5% on Software Assurance for Core Infrastructure Suite (CIS) Standard and Datacenter (SE and DC). These discounts are in addition to the discounts already provided for CIS SKUs in non-SCE programs.

Customers who only want to partially cover their environments with CIS can easily do so through other volume licensing programs, with no dedicated contracts or unit minimums. Existing ECIs can be renewed into the CIS SKU in other programs, such as Select Plus or Additional Products in the Enterprise Agreement Enterprise Enrollment.

What does this mean for Enrollment for Enterprise Platform (EAP) customers?
EAP customers can continue their installed-base–wide commitment to SQL Server, Visual Studio, BizTalk Server, and SharePoint Server in the SCE. Customers will see some small pricing changes as we standardize and simplify discounts.

If I have existing licenses without Software Assurance, how should I add those into the SCE Agreement?
For all licensed deployments of products that must be covered as part of an installed-based commitment to SCE that are not current with Software Assurance, you can choose to add them as subscription or to add them as L+SA at signing.

Can licenses without Software Assurance be added as Software Assurance only with the Software Assurance Prior L SKU?
The "Deferred License" approach through the Software Assurance Prior L SKU that was available in the EAP is being replaced in SCE with a more flexible subscription option.

How is subscription different than traditional L+SA?
Subscription options in SCE are available for the components that require an installed-base commitment. If workloads are retired or moved to the cloud, subscription license quantities can be reduced annually. Within a selected component, you can selectively choose to own/maintain perpetual units with full term commitments of three years or have some as subscription.

Can I buy a subscription for new units?
Yes, you can select whether units you add at signing of SCE or license at True-up (based on deployments) will be subscription or perpetual (L+SA). You can choose based on your individual workload requirements.

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