Volume Licensing brief

What are "Qualified Devices"?

Microsoft

This brief applies to the following commercial and government programs: The Microsoft Enterprise Agreement (Microsoft Enterprise Enrollment, Microsoft Enterprise Subscription Enrollment, and Microsoft IDP Enrollment), Microsoft Open Value, and Microsoft Open Value Subscription.

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Summary

This licensing brief can help you determine whether certain devices fit the definition of a "Qualified Device" under applicable Microsoft Volume Licensing agreements and enrollments, such as the Microsoft Enterprise Agreement (EA). The Qualified Device definition was revised in October 2012 and clarifies what a Qualified Device is and what "managing" a device means. The revised language only applies to customers who sign agreements or enrollments after October 1, 2012. However, the new language does not change licensing policies or terms, and customers with earlier agreements or enrollments can still refer to them to help guide them and easily determine what devices are included as qualified devices.

What's New in This Brief

This brief, published April 2014, replaces a previous version published November 2013. Changes include the following:

▶ A clarifying question regarding Industry Devices was added to the Frequently Asked Questions section.

Details

Intent of October 2012 Changes

For applicable Volume Licensing agreements and enrollments, the definition of Qualified Devices was revised October 2012. The revision is not intended to change the licensing policies or terms, but to clarify definitions and help customers easily determine what devices are included. For instance, many devices, such as smartphones and tablets, were previously excluded specifically because they had an embedded operating system. Because many of these same or similar devices

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no longer have an embedded operating system, the definition is now revised to exclude devices that are not "capable of running an instance of the Windows Professional operating system locally (in a physical or virtual operating system environment)." The definitions of Industry Devices and servers have not changed, nor has the policy of allowing customers to exclude such devices.

Qualified Devices

Some Volume Licensing agreements and enrollments, such as the Microsoft Enterprise Enrollment, provide organization-wide licensing with tiered pricing that can be based on the number of Qualified Devices. The following is the revised definition of a Qualified Device:

"Qualified Device" means any device that is used by or for the benefit of Enrolled Affiliate's Enterprise and is: (1) a personal desktop computer, portable computer, workstation, or similar device capable of running an instance of Windows Professional locally (in a physical or virtual operating system environment) or (2) a device used to access a virtual desktop infrastructure ("VDI"). Qualified Devices do not include any device that is: (1) designated as a server and not used as a personal computer, (2) an Industry Device, or (3) not managed (as defined in the Product List at the start of the applicable initial or renewal term of the Enrollment) as part of Enrolled Affiliate's Enterprise. At its option, the Enrolled Affiliate may designate any device that is used by or for the benefit of the Enrolled Affiliate's Enterprise (e.g., Industry Device) as a Qualified Device for all or a subset of Enterprise Products or Online Services the Enrolled Affiliate has selected.

Definition of Qualifying Devices as it appears in the Microsoft Enterprise Enrollment, October 2012. (Refer to your licensing agreement for the specific definition.)

Exclusions

As stated in the previous definition, certain devices are specifically excluded. You can choose to include any devices such as Qualified Devices for all or a subset of the enterprise products or online services you select. Including these devices can be advantageous because you can license these additional devices under your enrollment to gain potential discounts and other benefits versus licensing them through a separate agreement.

It is easy to determine some of the devices that are excluded, particularly Industry Devices (defined in full below) and servers (devices running a server operating system and used only as a server).

"Industry Device" (also known as line of business device) means any device that: (1) is not useable in its deployed configuration as a general purpose personal computing device (e.g., personal computer), a multi-function server, or a commercially viable substitute for one of these systems; and (2) only employs an industry or task-specific software program (e.g., a computer-aided design program used by an architect or a point of sale program) ("Industry Program"). The device may include features and functions derived from Microsoft software or third-party software. If the device performs desktop functions (e.g., email, word processing, spreadsheets, database, network or Internet browsing, or scheduling, or personal finance), then the desktop functions: (1) may only be used for the purpose of supporting the Industry Program functionality; and (2) must be technically integrated with the Industry Program or employ technically enforced policies or architecture to operate only when used with the Industry Program functionality.

Definition of Industry Device

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Another category of excluded devices—devices that are not managed—warrants further explanation and consideration.

Determining Which Devices Are Not "Managed"

Determining which devices are not managed requires understanding what specifically constitutes managing a device. The definition of "Management for Qualified Devices" in the Microsoft Volume Licensing Product List can help you understand this. The following is the definition as of October 2012:

A Volume Licensing customer "manages" any device on which it directly or indirectly controls one or more operating system environments. For example, a Volume Licensing customer manages any device:

▶ *it allows to join its domain, OR*

▶ *it authenticates as a requirement to use applications while on its premises, OR*

▶ *it installs agents on (e.g., anti-virus, antimalware or other agents mandated by the customer's policy), OR*

▶ *to which it directly or indirectly applies and enforces* *group policies, OR*

▶ *on which it solicits or receives data about, and, configures, or gives instructions to hardware or software that is directly or indirectly associated with an operating system environment, OR*

▶ *it allows to access a virtual desktop infrastructure (VDI) outside of Windows Software Assurance, Windows Intune or Windows Virtual Desktop Access Roaming Rights* [1].

A device that accesses a VDI under Roaming Rights only or utilizes Windows To Go on a Qualifying Third Party Device[2] off the customer's premises only, and is not managed for other purposes as described here, is not considered "managed" for purposes of this definition.

*A Volume Licensing customer who checks for up to date OS software or virus/security updates, and only notifies the user if they are not up to date, is not "enforcing group policy" for the purposes of this example.

Definition of Management for Qualifying Devices, Microsoft Volume Licensing Product List, October 2012
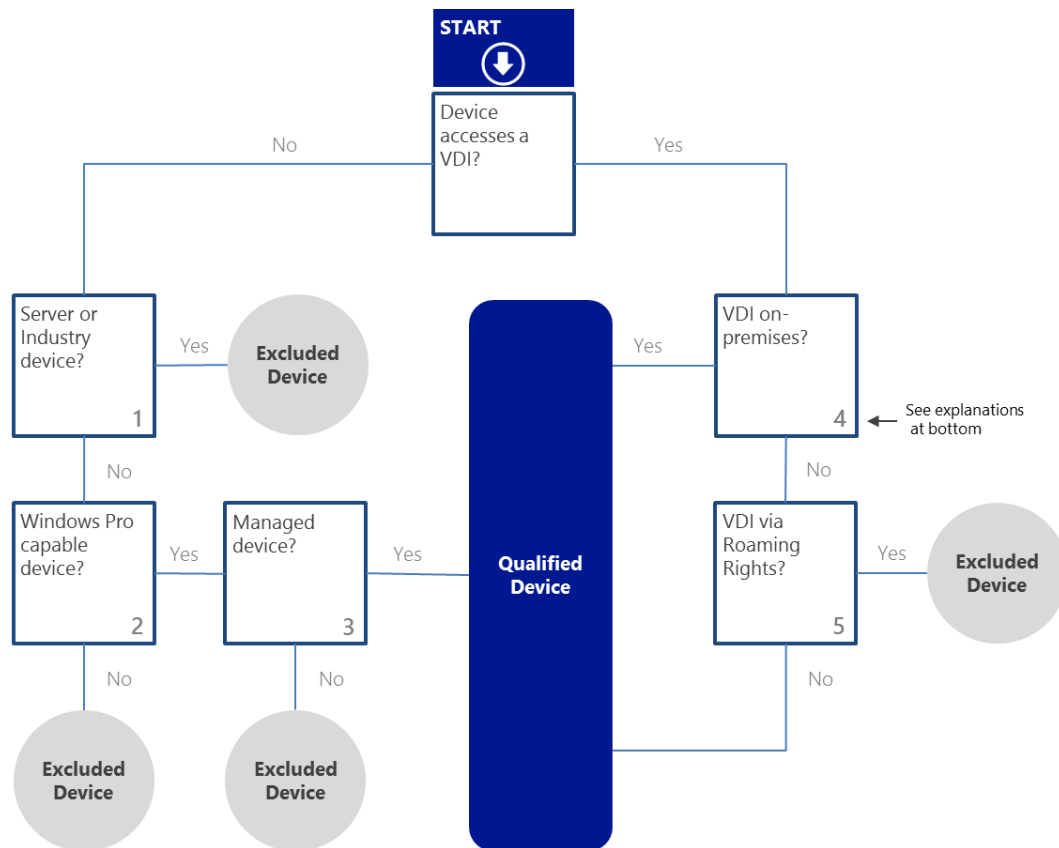
It may help you to think of the definition of the "management" list as a check list. If any of the examples of management apply to the device, such as it is domain-joined, then it is considered to be managed and, therefore, a Qualified Device.

You can also use the following decision tree to help you determine if a device is a Qualified Device.

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[1] Roaming Rights allow the primary user of any device licensed for Software Assurance for Windows, Windows Intune, or Windows VDA to access a VDI or run Windows To Go from noncorporate devices such as personally owned PCs while away from the office. For more information, refer to the Volume Licensing Reference Guide for Windows 8.1 and Windows RT 8.1.

[2] A "qualifying third-party device" is a device that is not controlled, directly or indirectly, by you or your affiliates (for example, a third-party's public kiosk). For more information, see the Product Use Rights.

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START

Device accesses a VDI?

No → Server or Industry device? **1**
- Yes → Excluded Device
- No → Windows Pro capable device? **2**
  - Yes → Managed device? **3**
    - Yes → Qualified Device
    - No → Excluded Device
  - No → Excluded Device

Yes → VDI on-premises? **4** ← See explanations at bottom
- Yes → Qualified Device
- No → VDI via Roaming Rights? **5**
  - Yes → Excluded Device
  - No → Qualified Device

Qualified Devices decision tree. Note: The full legal language is not shown in the tree for simplification purposes.

Explanations:

1. A device connecting to a VDI on-premises is always a Qualified Device.

2. Connecting to a VDI off-premises by the primary user of a separate device with Software Assurance for Windows or a Windows VDA subscription is covered under Roaming Rights. Note: Roaming Rights are allowed on qualified third-party devices.

3. Devices that do not connect to a VDI and are not capable of running Windows Professional locally (on the physical or in a local virtual machine) are not Qualified Devices.

4. Devices used as servers only (running a server operating system) and Industry Devices are not Qualified Devices.

5. All the items below constitute "management." All managed devices are Qualified Devices.

   ▶ The device joins the organization's domain.

   ▶ The device authenticates as a requirement to use applications while on-premises.

   ▶ Agents (for example, antivirus, antimalware, or other agents mandated by the organization's policy) are installed on the device.

   ▶ Windows group policies (or policies controlled by other management software) are directly or indirectly applied and enforced (excludes scanning the device and only notifying the user if it is not up-to-date).

   ▶ The organization solicits or receives data about, configures, or gives instructions to hardware or software that is directly or indirectly associated with an operating system environment.

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Frequently Asked Questions

1. **Does the revised definition of "Qualified Device" apply to my current enrollment?**

    No. The changes described here apply to enrollments signed on or after October 1, 2012. However, the new language does not change licensing policies or terms and can be referred to by customers with earlier enrollments to help guide them and easily determine what devices are included as Qualified Devices.

2. **What happens if the definition of "Management" changes in the Product List during my organization's enrollment term?**

    The current definition as of the start date of your current enrollment term remains in effect until your next renewal.

3. **What if an employee takes his or her personal computer to the IT department to have the IT department troubleshoot a problem and/or install a licensed product that the employee purchased themselves?**

    The action of an IT department installing software for personal use by the employee (and not for work use) does not make the device a Qualified Device.

4. **Can a PC that is running Windows but is used as a print server be excluded from the Qualified Device count under the server exclusion?**

    No. Unless the device is running a server operating system and being used only as a server, it is not considered a server for these purposes.

5. **Do devices that are covered by the Windows Companion Subscription License (CSL) need to be included in the Qualified Device count?**

    Yes. The CSL covers the Windows portion of the commitment for those devices. You still need to include those devices for any other product or service commitment under the EA.

6. **Can Industry Devices be managed or access a VDI?**

    Industry Devices are excluded from requirements for and are not considered Qualified Devices. However, Industry Devices that don't adhere to the Industry Device definition at any time during your agreement must be considered Qualified Devices.

7. **What does Microsoft consider to be "guest" Internet access? Does connecting to guest Internet access make a device a Qualified Device?**

    Guest Internet access is what a user expects to receive from a retail Internet access provider. Such access does not allow access to corporate resources and/or any resource that would not otherwise be provided in a public Wi-Fi hotspot and/or a home Internet connection. As long as the devices are not allowed access to corporate resources and/or any resource that would not otherwise be provided in a public Wi-Fi hotspot and/or a home Internet connection, connecting to guest Internet access would not make them Qualified Devices.

    Likewise, the act of authenticating solely for guest Internet use does not make a device a Qualified Device.

    If an agent is installed on the device, for instance, a customer updates antivirus software on the device before allowing a connection, then that action is considered managing the device and, therefore, makes it a Qualified Device. However, if an agent simply scans the device to verify that Windows and antivirus software is up to date and only notifies the user if the device is not up to date, but does not act on the device, then the scanning does not make the device a Qualified Device.