

Licensing Guide

School Enrollment



Microsoft School Enrollment Licensing Guide

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Introduction

This guide provides information to help you understand the Microsoft School Enrollment licensing offering and to deploy and manage your software licenses. It is provided for informational purposes only. Your licensed product use is governed by the terms of your licensing agreement. The Microsoft [Volume Licensing Product Terms](#) document, which is updated regularly, provides additional details regarding current use rights for specific Microsoft products acquired through Volume Licensing programs.

Academic Volume Licensing Overview

For education customers who license software in 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 “transactional” Volume Licensing programs for education customers. Learn about [licensing options for educational institutions](#).

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. For application, system, and Client Access License (CAL) products, you remain fully licensed throughout the designated term—even if the number of devices or users grows. You also only need to report increases to your number of devices or full-time equivalent (FTE) employees on your annual order.

Enrollment for Education Solutions (EES) is for primary/secondary and higher education institutions and offers the simplicity of counting people instead of devices. The EES School Enrollment and the Open Value Subscription for Education Solutions agreement are for K–12 primary/secondary schools and preschools and makes it easy to license all of a school’s eligible PCs by counting them just once per year. The School Enrollment is explained in detail in this guide.

Transactional Licensing

With transactional Volume Licensing programs, you acquire perpetual software licenses (meaning your licenses never expire) while eliminating the costs and packaging of retail software.

Microsoft has two transactional Volume Licensing programs for education customers: Microsoft Open License for Academic and Microsoft Select Plus for Academic.

School Enrollment Benefits

Subscription licensing through the School Enrollment offers many benefits, including:

- ▶ **Easy compliance.** Because all of your institution’s devices and users are covered throughout the subscription term, it is easy to ensure that your institution is fully licensed for the products you have selected.
- ▶ **Low administration.** Subscription licensing eliminates the need to track licenses for the selected products on every device, which is especially helpful for managing software assets in a decentralized environment.
- ▶ **Current technology.** Subscription licensing allows your licensed users to run the newest versions of the software products included in your subscription.
- ▶ **Simple budgeting and purchasing.** One annual payment covers all the products you have selected for the year.
- ▶ **Excellent value.** By standardizing on a platform of products, you can reduce your total IT costs while helping to boost productivity and access to current technology. Software Assurance is included with your license coverage at no additional charge.

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School Enrollment Details

Simple Compliance and Administration

Because you license most of the non-server products selected in your subscription for use on all of the institution-owned or leased devices within the school(s), School Enrollment makes it easy for administrators and users to know that their product use is compliant with licensing requirements. Although you report a specific PC count when submitting your order, any new PCs you add during the subscription year are licensed to use the School Enrollment products.

Your students can use the licensed products on devices in classrooms or open-access labs. To license your students to use the product on personally owned machine or on a school-owned machine designated for an individual student's exclusive use, your school may enroll in the Student Option (see [The Student Option](#) section below).

Purchasing School Enrollment Coverage

School Enrollment coverage is available through any Microsoft Authorized Education Partner (AEP). AEPs are authorized to sell Microsoft Academic Edition products and volume licenses to qualified education users. To participate in School Enrollment or any of our other academic licensing programs, or to obtain current pricing, please contact an AEP. To find an AEP in the United States or Canada, visit the [Microsoft Partner Center](#). For other regions, visit your regional Microsoft Volume Licensing website. Locate your [regional Microsoft Volume Licensing website](#).

Counting Eligible PCs

School Enrollment requires an institution-wide commitment for any application, system, and CAL products selected. To that end, you must include all of the eligible PCs in the participating school(s) or district. You must also include any additional machines within your institution on which any of the software will be run.

Program Eligibility

K–12 schools (including the administrative offices or boards of education of qualifying schools) and preschools can participate in the School Enrollment program if they meet the specific eligibility requirements. Download the [Qualified Education User Definition](#) for your location to verify eligibility.

Hospitals, healthcare systems, and research laboratories are not qualified to participate in the School Enrollment program.

Aggregate Groups/Consortia

Special approval from Microsoft is required for aggregate groups (such a consortium of school districts) to enter into a School Enrollment. Contact your Microsoft representative or AEP for more information.

Term

You can choose a one-year or three-year licensed term when completing the subscription enrollment. In either case, you submit an annual order with your reseller specifying the licensed product selections for the year.

One-Year Subscription Option

This option provides you with temporary license coverage for 12 months. At the end of the licensed term, you can extend the coverage for another 12 months by submitting an extension order through your reseller. You must place the extension order before the expiration of your current licensed term. With your extension order, you need to include an updated PC count, any changes to your product selections, and a new Student Option count (if you chose the Student Option).

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Three-Year Subscription Option

You can also choose to subscribe for a three-year licensed term. If you choose the three-year option and comply with the ordering requirements identified below, Microsoft does not increase the per-unit pricing to your distributor for your anniversary orders above the prices for the initial licensed product order.

Note: Your reseller determines your actual annual pricing. For this reason, Microsoft cannot guarantee that your per-unit pricing for years two and three does not change. You can discuss pricing details with your reseller.

By choosing the three-year subscription option, in addition to your initial order, you agree to submit an anniversary order prior to (or on) the first and second anniversaries of the effective date of your subscription enrollment. If you do not submit an order, your subscription enrollment will be terminated.

Your anniversary orders must be for at least the same quantity of all software ordered in the first year. For example, your anniversary order would include 250 PCs even if the total number of eligible PCs for Year 2 decreases from 250 to 245. If your number of eligible PCs increases for Year 2, but decreases for Year 3, your Year 3 anniversary order can reflect that decrease in PCs, but the decrease must not fall below the number of PCs included on your Year 1 order.

If the number of eligible PCs increases, you must include those PCs on your anniversary order. For example, if your total number of eligible PCs increases from 250 to 300 during the first year, you must include 300 PCs on the anniversary order for any application, system, or CAL products.

If you selected the Student Option in your original order, you can also increase, but not decrease, the number of students included in your Student Option.

The individual license prices we charge your distributor for all additional PCs and/or students is consistent with the prices charged for your original order.

When you submit your anniversary order, you can also order any software product that was not part of your initial order. The price that Microsoft charges your distributor for products not ordered previously is the current price on our price lists. Microsoft does not increase this price for the remainder of the licensed term.

Additional Orders

Whether you choose the one-year or three-year subscription, you can place licensed product orders with your reseller at any time during the year after your initial order. When you place an additional order, you are charged a prorated price based on the number of months remaining in your 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 pay for nine months (.75 times the annual per-product price). If you order a product at month nine, you pay for six months (.5 times the annual per-product price).

When placing an additional order for Online Services, you are charged a prorated price based on the number of months remaining in your School Enrollment term, with a minimum price of one month's subscription. For example, if you order Office 365 ProPlus during month nine, you are charged for four months (one full month for the remaining days in month nine, plus the three months remaining in the term).

Product Availability

You can order subscription licenses for a wide selection of Microsoft software through the School Enrollment program. Refer to the Microsoft Volume Licensing [Product Terms](#) for a complete list of currently available products.

School Enrollment Desktop Packages

If you prefer to license your devices and users for a standard set of desktop PC licensed products, Microsoft provides the following "Desktop" packages, which offer a discounted price on the cost of licensing the products individually.

The **Education Desktop** package includes:

- ▶ Windows Education Upgrade
- ▶ Microsoft Office Professional Plus and Microsoft Office for Mac
- ▶ Microsoft Core CAL Suite

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The **Education Desktop with Microsoft Enterprise CAL** Suite includes:

- ▶ Windows Education Upgrade
- ▶ Microsoft Office Professional Plus and Microsoft Office for Mac
- ▶ Microsoft Enterprise CAL Suite

Windows student use benefit

When you license Windows Education Upgrade for all of your faculty/staff FTE employees, organization-wide, you are eligible for corresponding subscription licenses for students within the same defined organization at no additional charge. See the [Special Use Rights](#) section of this document for more details.

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 Education. These licenses fulfill your requirement for a full qualifying operating system. After you have acquired the full operating system license, you are then eligible to license those PCs for Windows Education Upgrade through your School Enrollment. Learn about [software licensing and the risks of software piracy](#).

Minimum Order Requirement

You can select the individual product(s) you want to license through your School Enrollment. Pricing for application, system, and CAL products is based on a count of your eligible PCs and requires institution-wide coverage of the products selected.

Your first order under a School Enrollment must be for a minimum number of units.* You determine the total units covered under your subscription enrollment by combining your application, system, and CAL units with your server units. You can choose any individual product or combination of products to meet this requirement.

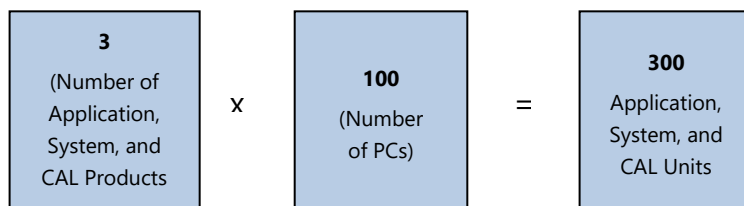
*Minimum units may vary by geography. Contact your reseller to verify minimum requirements for your location.

Calculating Units for Application, System, and CAL Products

To determine your application, system, and CAL units, multiply the total number of application, system, and CAL products selected by your total number of eligible PCs. Unit values for application, system, and CAL products are not weighted—each has a unit value of 1. (Refer to the Volume Licensing [Product Terms](#) to verify unit values for individual products.)

Note: You cannot select application, system, and CAL products for only a portion of the PCs included in your subscription. For instance, if your subscription is for 100 PCs, then the application, system, and CAL products you select are for all 100 PCs—even if only a portion of those PCs run a particular product—in order to meet the 300-unit minimum (US minimum). We realize that not all products are used at the same rate. Pricing is set to reflect the typical use rates for each product. For instance, the per-PC price for Microsoft Project is based on the assumption that it is used on fewer PCs than some of the other products.

For example, a school licensing 100 eligible PCs for Windows Education Upgrades, Microsoft Office, and Core CAL would calculate their application, system, and CAL units as follows:

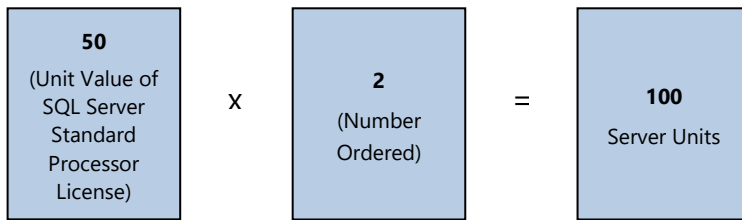


Calculating Units for Server Products

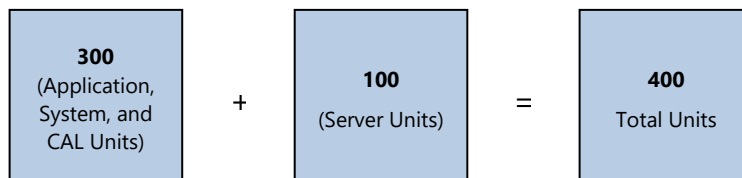
For server products, you multiply the unit value for the server product by the number ordered. Each server product is assigned a unit value, which is published in the Volume Licensing [Product Terms](#).

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If the same school as in the example above orders two Microsoft SQL Server Standard Processor Licenses, they would calculate their server units like this:



By combining their application, system, and CAL units with their server units, they reach a total of 400 units, exceeding the 300-unit minimum requirement.



Tiered Pricing

Some application and system products are offered at tiered pricing levels, depending on the total number of PCs included under your subscription enrollment. In these instances, pricing levels are determined as follows:

<i>NUMBER OF PCS</i>	<i>PRICING LEVEL</i>
Fewer than 2,500	Level A
2,500 or more	Level B

Contact your partner for specific pricing for the appropriate level for your institution.

Licensing Microsoft Online Services through your School Enrollment

You can license Microsoft Online Services, such as Office 365 ProPlus, through your School Enrollment. However, the licensing model for these services differs from other School Enrollment offerings. Following are the unique licensing rules that apply to these two suites and their components when licensed through School Enrollment.

User-Based Licensing

Unlike the PC count used to license PCs school-wide for application, system, or CAL products under School Enrollment, Online Services require one User Subscription License for each individual who accesses any of the services. As a result, you can license any number of users instead of the entire institution.

Note: Because Online Services licensing is not based on your PC count, new users are not automatically licensed for the services (as they are for your application, system, and CAL products). You must order an additional User Subscription License for each additional user who accesses the service.

License Term

All Microsoft Online Services licensed through the School Enrollment have the same expiration date as the School enrollment under which it is licensed. When adding Online Services midterm, the USL is prorated to the month. The minimum term length for the services is one month.

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School Enrollment Documents

When licensing Microsoft software through School Enrollment, it is important that you review and understand the specific use rights granted by your license coverage.

Below is an overview of three important documents that detail those rights—the Microsoft Campus and School Agreement (CASA), the Microsoft School Subscription Enrollment, and the Microsoft Volume Licensing Product Terms.

Microsoft Campus and School Agreement

The Microsoft Campus and School Agreement contains an overview of the program and general terms and conditions. The Campus and School Agreement has no expiration date. Once this agreement is in place, you do not have to sign another one when renewing your annual coverage.

Microsoft School Subscription Enrollment

The Microsoft School Subscription Enrollment provides contact information, lists the participating schools, and enrolls you in the Student Option. This document also specifies the licensed period (one or three years) and the total eligible PC count that you cover in the first annual order.

Note: The same entity that signs the Campus and School Agreement must sign all school subscription enrollments under that agreement.

Microsoft Volume Licensing Product Terms

The [Product Terms](#) document contains the product-specific terms and conditions that govern how Microsoft products can be used in the Volume Licensing programs. It is the equivalent of the End User License Agreement (EULA) that you would receive when purchasing a retail licensed product. The Product Terms provides monthly information about Microsoft licensed product and Online Services licensed through Microsoft Volume Licensing programs, including the availability of new software and products offered through Microsoft Volume Licensing.

Special Use Rights

Student Use Benefit

When you license certain products for all of your faculty/staff FTE employees, organization-wide, you are eligible to order corresponding subscription licenses for students within the same defined organization at no additional charge. To receive this benefit, order the no-cost licenses for Office 365 ProPlus. To receive the Windows Education Upgrade for students benefit, go to [Windows 10 Education](#).

The following products qualify for the student use benefit:

Buy Org-wide Faculty/Staff Licenses for:	Get No-cost Student Licenses for:
Office Professional Plus, Office 365 ProPlus, or Office 365 Education E5	Office 365 ProPlus
Windows 10 Education Upgrade	Windows 10 Education Upgrade

Software Assurance Home Use Program

As a School Enrollment customer, you can give your faculty and staff members access to the Microsoft Office system desktop PC programs to use on their personally owned devices through the Home Use Program (HUP). As a benefit of Microsoft Software Assurance (see the [Software Assurance](#) section below), HUP provides a low-cost way for your users to purchase home-use licenses and be more productive on the same software they use at work when they use it at home. It can also help reduce your support calls because these users can access Microsoft Support. Providing the HUP licensed product is easy for the institution, because the institution does not have to handle the distribution of the software. After your Software

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Assurance benefits administrator activates the benefit, individual faculty and staff members can order and pay for shipping of their licensed product online.

Learn more about the [Software Assurance Home Use Program](#).

Software Assurance

School Enrollment includes Microsoft Software Assurance for Volume Licensing, a single cost-effective program that can help boost productivity across your organization through 24 hours a day, seven days a week (24/7) support, deployment planning services, user and technical training, and the latest software releases and unique technologies. It is also an excellent way to help improve user productivity with online training and home use licenses that help enhance skills and accelerate familiarity with Microsoft software. To help IT staff efficiently manage your Microsoft technology, Software Assurance provides new software releases as they become available, provides access to unique desktop technologies, including Windows Education, 24/7 phone and web support, technical classroom training, and deployment planning services.

Note: Software Assurance benefits are subject to change. Refer to the [Product Terms](#) to verify current benefits.

All licenses acquired through your School Enrollment are automatically covered under Software Assurance. See the [Software Assurance overview](#) to find out which benefits your institution is entitled to.

Microsoft Imagine Academy

The Microsoft Imagine Academy is an annual subscription program designed for accredited academic institutions worldwide. Imagine Academy is a complete technology education solution connecting staff, teachers, students, employers and local communities through leading-edge technology skills development that leads to certification. With a full curriculum for teaching technology courses and learning tools that help students achieve success, Imagine Academy enables you to offer training not only on fundamental technology skills, but also technical courses for your students, faculty plus staff who are interested in pursuing a career in IT after graduation. Imagine Academy membership is open to all institutions qualifying for Microsoft licensing academic agreements, and you can easily add an Imagine Academy subscription and Microsoft Certifications through your School Enrollment.

Learn more about [Imagine Academy](#).

The Student Option

The School Enrollment Student Option provides a convenient and cost-effective way for you to license your students to use selected products on a personally owned device or a school-owned device designated for the student's exclusive use (for example, a laptop checked out to a student for the school year).

With the Student Option, you license a specific number of students. This number cannot be changed during the course of the licensed period. If you choose the three-year subscription, each anniversary order must include at least the same number of students as in the Year 1 order.

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

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

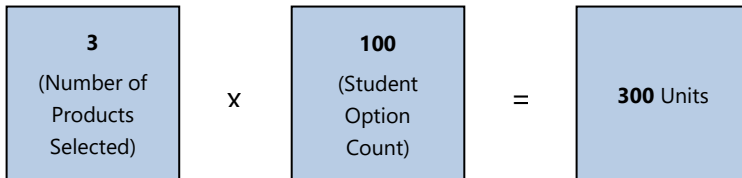
Note: When licensing Online Services for your students, you are not required to license 100 percent of your students. Each individual student who accesses any of the services is required to have a User Subscription License.

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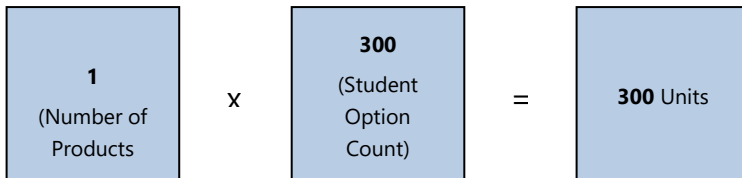
Minimum Order Requirement for Student Option

Your student count and the respective product selection for those students must meet the minimum requirement of 300 units.

For example, a school that enrolls 100 students in the Student Option for three products meets the minimum requirement of 300 units.



Similarly, another school that enrolls 300 students in the Student Option could meet the minimum requirement by selecting just one product.



You cannot combine your faculty/staff and student license purchases to meet the 300-unit minimum. You must meet both minimums individually (300 units for the faculty/staff and 300 units for the Student Option).

Student Product Selection

You can choose any of the School Enrollment application, system, or CAL products for your students. The products selected do not have to match those selected for your institution devices.

Student Use Rights

The terms of your licensing agreement govern your student licensed product use. The [Product Terms](#), which are published quarterly, provide additional details regarding current use rights for specific Microsoft products acquired through a licensing agreement.

Students are only licensed to use the product during the licensed period. These licenses are temporary (meaning the student does not **own** the license). On leaving the school or expiration of the subscription enrollment, students are required to remove the licensed product. Your school is responsible for communicating the appropriate use rights to students when distributing the licensed product.

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

Renewing Your School Enrollment Coverage

If you chose the one-year license term on your subscription enrollment, you can renew your School Enrollment coverage by submitting an extension order through your reseller before the expiration of your licensed term. This order extends the licensed term for an additional year. With your extension order, you include an updated device count, any changes to your product selections and a new Student Option count (if you chose this option on your subscription enrollment). Extension orders are subject to the 300-unit minimum order size.

If you chose the three-year licensed term on your subscription enrollment, then you renew your School Enrollment coverage by submitting an anniversary order through your reseller before the first and second anniversaries of the effective date of

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your subscription enrollment. If you are at the end of your three-year licensed term, you must complete a new subscription enrollment to continue to be licensed under your School Enrollment.

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

Purchase perpetual licenses using the Buy-out option

1. You can purchase perpetual licenses for the products and quantities you want to continue using by acquiring “buy-out” licenses offered under the program. Some limitations apply, as outlined in the [School Enrollment Details](#) section of this document.

Remove the software

If you do not submit a new extension order (one-year option) or anniversary order (three-year option), sign a new subscription enrollment, or exercise the Buy-out option, you are required to remove all products from every device, and your school must revert to using the product that you had licenses for prior to the start of your School Subscription Enrollment.

Combination

You can choose a combination of the choices listed above.

For example, you want an additional 12 months of School Enrollment 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 subscription. 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 machines.

Additional Resources

Locating an Authorized Education Partner (AEP)

To find an AEP in the United States or Canada, use our search tool at <https://partnercenter.microsoft.com/pcv/search>.

Outside of the United States and Canada, find the local Microsoft site at <http://www.microsoft.com/worldwide/>.

Software Assurance

Learn more about the Software Assurance benefits you receive as a School Enrollment customer at <http://www.microsoft.com/softwareassurance/>.

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>.

Volume Licensing for Education Customers

If you have further questions about School Enrollment or other discounted purchasing options for education customers, please visit our website at <https://www.microsoft.com/en-us/education/buy-license/overview-of-how-to-buy/default.aspx> or contact a reseller.

Microsoft Imagine Academy

Find out more about the opportunities for students, faculty, and staff through the Microsoft Imagine Academy at <https://imagineacademy.microsoft.com>.