

# Licensing for Academic Institutions

## Volume Licensing

### ELIGIBILITY

In order to be eligible for Academic Volume Licensing, an organization must be a **Qualified Educational User**. This does not mean that Academic Volume licensing applies only to schools, but it does vary by geography. Find a complete list here: <http://www.microsoft.com/education/ww/buy/pages/volume-licensing.aspx>

### ACADEMIC VOLUME LICENSING OPTIONS

	Perpetual			Non-Perpetual	
Primary and Secondary Schools	Open	Open Value Non-Company	Open Value Company Wide	Schools Agreement Enrollment ✓ All PCs ✓ SA included	OVS: Education Solutions ✓ All FTEs ✓ SA included
Universities and Colleges	Select Plus	Academic Open	Academic Select Plus	Enterprise Agreement ✓ All PCs ✓ SA included	Enrollment for Education Solutions ✓ All FTEs ✓ SA included

■ can be sold by AERs    ■ can be sold by EdLARs only

### ACADEMIC SELECT PLUS

- ▶ Perpetual licenses
- ▶ Evergreen agreement
- ▶ Aimed at institutions with 250+ PCs
- ▶ One price level based on points and pools
- ▶ 500 point purchase per year per chosen pool required
- ▶ Software Assurance (SA) optional
- ▶ If purchased, SA is always 36 months
- ▶ Institution receives media and updates for all products in chosen product pools
- ▶ Available through EdLAR (Educational Large Account Reseller) channel

### ACADEMIC OPEN

- ▶ Perpetual licenses
- ▶ 5 licenses to begin agreement
- ▶ 150 points to qualify for Open Level C, otherwise Open No Level
- ▶ 2 year agreement
- ▶ Two price levels based on points and pools
- ▶ SA optional
- ▶ Media purchased separately
- ▶ Available through AER (Authorized Educational Reseller) channel

### Similarities with Commercial Open and Commercial Select Plus:

- ▶ As with the commercial counterpart, institutions purchasing through an Academic Open agreement need to split their software requirements into the different pools (Systems, Applications and Servers) and then tally the points within each pool to find their price level. Software Assurance points are calculated at half the License points per year
- ▶ At the end of the agreement, institutions have the same options as those available with commercial Open and Select Plus agreements

### Working at Home

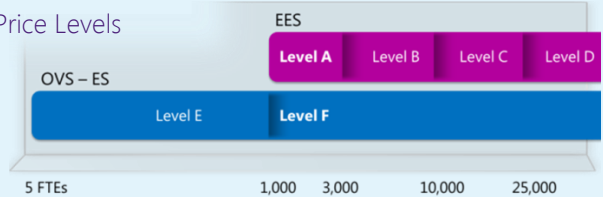
- ▶ Work at Home Rights
  - Faculty and staff are licensed to use application, system, and CAL products on a personally owned computer for institution-related purposes
  - All employees included in the FTE count receive these rights
- ▶ Home Use Program
  - Faculty and staff can get Microsoft Desktop Application software to use on their home computer for both work and personal use at a nominal cost

**Institutions are not permitted to provide software for the same title to any individual faculty or staff member via both HUP and WAH**

### OVS-ES AND EES

OVS-ES (Open Value Subscription: Education Solutions) and EES (Enrollment for Education Solutions) are subscription licensing programs.

#### Price Levels

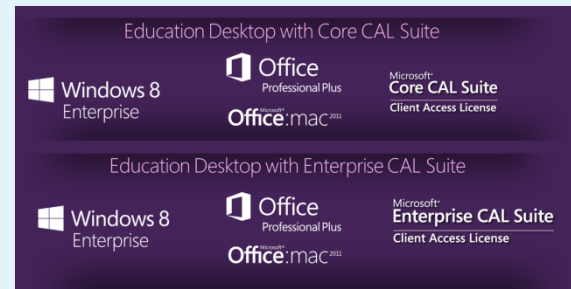


#### FTEs

- ▶ Full Time Equivalents
  - Institutions count FTEs to license their chosen products
  - Minimum of 5 FTEs where FTEs are calculated as: (full-time faculty) + (part-time faculty ÷ 3) + (full-time staff) + (part-time staff ÷ 2)
- ▶ Optional exclusion
  - Employees such as maintenance, groundsmen, and cafeteria staff may be excluded from the FTE count if they do not use institutional devices

#### Enterprise Wide Products

- ▶ Desktop Platform Products must be licensed enterprise wide and may be licensed individually or as the Desktop Platforms:



- CAL Suite Components are not Desktop Platform Products, but must be licensed enterprise wide

#### Additional Products

Products listed as Additional Products can be purchased in any quantities. Some Additional Products are available at an advantageous price point if taken enterprise-wide

#### Student Option

Institutions can use this option to license students to use a selection of products on a personally-owned or an institution-owned computer designated for a student's exclusive use.

- ▶ Eligibility
  - 5 Student FTEs (OVS-ES) or 1,000 Student FTEs (EES)
  - Students must be enrolled in the educational institution
- ▶ Process
  - 100% of students in a department or institution must be licensed
  - Calculating total Student FTE count: all full time students + one third of part time students
  - Products do not have to match those chosen for faculty and staff
  - EES only: Those students that are included and that graduate during the licensed term are granted perpetual use rights to the licensed products

## SCHOOL ENROLLMENT

- ▶ Primary and Secondary schools
- ▶ Institution-wide commitment based on PCs
- ▶ All faculty and staff and students are licensed to use the software on institution-owned devices
- ▶ Minimum of 50 points required
- ▶ 2 price levels:  
Level A = minimum varies by geography;  
Level B = 2500+ PCs
- ▶ Non-perpetual licenses
- ▶ 1 or 3 year agreement
- ▶ Annual payment and reporting
- ▶ Software Assurance included
- ▶ Available through AER channel



## Desktop Platforms

There are two Desktop Platforms available to institutions that enroll in a School Enrollment:

- ▶ **School Desktop with Core CAL Suite:**  
Windows 8 Enterprise, Microsoft® Office Professional Plus (or Office for Mac) and Core CAL Suite
- ▶ **School Desktop with Enterprise CAL Suite:**  
Windows 8 Enterprise, Microsoft® Office Professional Plus (or Office for Mac) and Enterprise CAL Suite

## Student Option

Institutions can use this option to license students to use a selection of products on a personally-owned or an institution-owned computer designated for a student's exclusive use.

- ▶ Eligibility
  - Minimum program units apply which vary by geography
  - Students must be enrolled in the educational institution
- ▶ Process
  - Institution chooses number of students to be licensed on signing of the initial agreement
  - Products do not have to match those chosen for faculty and staff
  - Those students that are included and that graduate during the licensed term must de-install the software

## Price Level Calculations

### STEP 1: Calculate Desktop Units

#### First...

1. Calculate the total number of PCs

$$\begin{array}{|c|} \hline 100\% \text{ of all Pentium} \\ \hline \text{III, iMac G3,} \\ \hline \text{equivalent or better} \\ \hline \text{machines} \\ \hline \end{array} + \begin{array}{|c|} \hline \text{Number of other} \\ \hline \text{computers using the} \\ \hline \text{software} \\ \hline \end{array} = \begin{array}{|c|} \hline \text{Total number} \\ \hline \text{of PCs} \\ \hline \end{array}$$

#### And then...

2. Choose products (each usually with a unit of 1) and multiply by PC count

### STEP 2: Calculate Server Units

Multiply unit value (from the Product List) by the number ordered

### STEP 3: Calculate Total Units

Sum the desktop and server units to find the total unit count

## Additional Products

Application, System and CAL products cannot be selected for only a portion of the PCs included in a School Enrollment. For example, a school that has 100 PCs must purchase 100 Project Professional licenses, even if only a portion of the PCs will run this product

## Working at Home

- ▶ Work at Home Rights
  - Faculty and staff are licensed to use application, system, and CAL products on a personally owned computer for institution-related purposes
  - The primary user of the licensed school computer receives these rights
- ▶ Home Use Program
  - Faculty and staff can get Microsoft Desktop Application software to use on their home computer for both work and personal use at a nominal cost

Institutions are not permitted to provide software for the same title to any individual faculty or staff member via both HUP and WAH

## MICROSOFT IT ACADEMY

The Microsoft IT Academy Program subscription offers educational establishments extensive benefits and the opportunity to deliver Microsoft's IT Training and Qualifications to their Students, Staff and wider community.



## ACADEMIC FPP

- ▶ Perpetual licenses
- ▶ Version upgrades available
- ▶ No signed agreement required
- ▶ No Software Assurance available
- ▶ EULA, media and manual included in box
- ▶ Available through AER (Authorized Educational Reseller) channel or retailers



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