

Microsoft Qualified Devices and Qualified Users

This brief applies to all Microsoft Licensing programs.

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Summary

This licensing brief provides guidance on what type of devices are a “Qualified Device” and what type of users are a “Qualified User” under applicable Microsoft Commercial Licensing agreements and enrollments, such as the Microsoft Enterprise Agreement (EA).

Details

Qualified Devices

Some Commercial Licensing agreements and enrollments, such as the Microsoft Enterprise Agreement (EA) Enrollment, provide organization-wide licensing with tiered pricing that can be based on the number of Qualified Devices. The following is the Microsoft 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 Windows Pro 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 a Managed Device. At its option, the Enrolled Affiliate may designate any device excluded above (e.g., Industry Device) that is used by or for the benefit of the Enrolled Affiliate’s Enterprise as a Qualified Device for all or a subset of Enterprise Products or Online Services the Enrolled Affiliate has selected.

Note: *Definition of Qualifying Devices as it appears in the Microsoft EA Enrollment, October 2019.*

Exclusions

As stated in the definition, certain devices can be specifically excluded, such as Industry Devices or unmanaged devices. You can choose to include any excluded devices 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), unmanaged devices (defined in full below), and servers (devices running a server operating system and used only as a server).

Industry Device

“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.

Note: *Definition of Industry Device as it appears in the Microsoft EA Enrollment, October 2019.*

Unmanaged devices - Determining Which Devices Are Not “Managed”

If Customer’s volume licensing agreement refers to the Product Terms, the Product List, or the PUR for defining managed Qualified Devices, the following terms apply. Customer “manages” any device on which it directly or indirectly controls one or more operating system environments. For example, 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 SA, Microsoft Intune (Device) or Windows Virtual Desktop Access Roaming Rights

A device that accesses a VDI under Roaming Rights only or utilizes Windows To Go on a Qualifying Third Party Device 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.

Note: *Definition of Management for Qualifying Devices, Microsoft Product Terms, November 2020*

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 managed, and therefore is a Qualified Device.

Here are some of the most common actions that classify a device as a Managed Device:

- 1) A device connecting to a VDI on-premises is always a Qualified Device.
- 2) A managed device is deemed a Qualified Device. All the items below constitute "management".
 - 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.

Qualified Users

Similar to the organization-wide licensing option for Qualified Devices, customers can choose to license Qualified Users instead of licensing Qualified Devices, or a combination of both as long as all Qualified Devices not covered by a license are only used by users covered with a user license. Some Commercial Licensing agreements and enrollments, such as the Microsoft Enterprise Agreement (EA) Enrollment, provide organization-wide licensing with tiered pricing that can be based on the number of Qualified Users. The following is the Microsoft definition of a Qualified User:

"Qualified User" means a person (e.g., employee, consultant, contingent staff) who: (1) is a user of a Qualified Device, or (2) accesses any server software requiring an Enterprise Product Client Access License or any Enterprise Online Service. It does not include a person who accesses server software or an Online Service solely under a License identified in the Qualified User exemptions in the Product Terms.

Note: Definition of Qualifying User as it appears in the Microsoft EA Enrollment, October 2019

Frequently Asked Questions

Q1: *What happens if the definition of "Management" changes in the Product Terms during my organization's enrollment term?*

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

Q2: *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?*

A: 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.

Q3: *Can a PC that is running Windows 10 but is also used as a print server be excluded from the Qualified Device count under the server exclusion?*

A: 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.

Q4: *Can Industry Devices be managed or access a VDI?*

A: Industry Devices are excluded from requirements for and are not considered Qualified Devices. However, Industry Devices that do not adhere to the Industry Device definition at any time during your agreement are Qualified Devices.

Q5: *What does Microsoft consider to be "guest" Internet access? Does connecting to guest Internet access make a device a Qualified Device?*

A: 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.

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