

# Symantec Policy for Using Enterprise Flex Funds for Install Base License Transfer



## Scope:

This "Using Enterprise Flex Funds for Install Base License Transfer Policy" ("Policy") is effective as of August 6, 2008 ("Effective Date"). Symantec reserves the right to amend this Policy periodically and will post updates at <http://www.symantec.com/business/products/policies/index.jsp>. This Policy documents the requirements and process for allowing you to perform the same license transfers permitted in Enterprise Flex (**Eflex**) Standard deals (i.e. Platform transfers, Tier transfer, and Cross-grades) on your Install Base (IB) licenses using your Eflex Funds.

## Policy:

### Engagement:

- During contract negotiation, you must request the ability to use Enterprise Flex funds to perform License Transfers on existing Install Base licenses.
- In the Eflex contract, you must identify the specific Install Base licenses eligible to be transferred/managed with your new Eflex funds.

### Restrictions:

- You can only use Eflex funds to perform transfers of existing Install Base licenses where both the original products, tiers, operating system and the replacement products, tiers, operating system and/or cross-grades are available for deployment under your new Site License.
- Your Eflex contract mandates\* Install Base renewal during deployment period + provides pricing for a grey year (out year).
  - Install Base renewal must be for Essential Support and not Basic Maintenance.
  - \* Install Base grey year is initially optional and becomes mandatory if You exercise the option to purchase site license grey year for that product pool.
- You must co-terminate your Install Base Essential Support with the new Eflex deployment term (per above) plus the grey year (out year).

### Execution:

- You are allowed one balance adjustment per quarter related to Install Base License Transfers.
- During the deployment period, You will pull the new "replacement" licenses from the License Portal, at the desired destination tier/operating system/crossgrade.
- Your assigned Symantec Enterprise Customer Advocate will provide you with a License Transfer Worksheet. You must complete this worksheet to document the existing Install Base licenses to be replaced by those licenses you pulled in the step above.
- Once a quarter, You will submit your completed License Transfer Worksheet to your assigned Symantec Enterprise Customer Advocate.
- Symantec's Enterprise Customer Advocate Team will handle the processing of the License Transfer Worksheet and any subsequent Site License balance adjustment.

## Related Information:

Click [here](#) for information on Symantec's Enterprise Options licensing program.

### Definitions:

Capitalized terms that are not defined in this Policy or your Licensing Program, will have the following meanings.

- a) **“Site Licenses”** means a Symantec Enterprise License transaction providing flexible deployment rights for a defined product set, over a defined period of time, in exchange for defined fees. Enterprise Flexible is a type of Site License.
- b) **“Enterprise Flex (EFlex)”** refers to Symantec Enterprise Flex Licensing Program. Also referred to as Site License.
- c) **“Grey Year”** refers to the year immediately following the end of the contract period. For example, year 4 of a 3 year contract.
- d) **“Install Base”** refers to Symantec’s records of those licenses that You are entitled to deploy.
- e) **“We,” “we” or “our” or “Symantec”** means Symantec Corporation or its subsidiaries.
- f) **“You,” “you” or “your”** means you as the customer, the company, or the legal entity that has obtained the Symantec product copy.