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Microsoft® Select Plus For Academic Program Guide

Microsoft | Volume Licensing

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Academic Volume Licensing Overview

For education customers who license software in quantity and manage software across multiple computers, Microsoft Volume Licensing programs may provide the most cost-effective way to acquire licenses.

Microsoft offers both "subscription" and "transactional" volume licensing programs for education customers.

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, even if the number of computers or users grows, you remain fully licensed throughout the designated term, and you only need to report increases on your Full-time Equivalent (FTE) employees on your annual order.

Microsoft has two subscription licensing programs for education customers. Campus Agreement is for higher education institutions and offers the simplicity of counting people instead of computers. School Agreement is for K-12 schools and preschools and makes it easy to license all of a school's eligible PCs by counting them just once per year.

Subscription licensing offers many benefits, including:
- **Easy compliance**. Because all of your institution's computers and users are covered throughout the subscription term, it's easy to be sure that your institution is fully licensed for the products you've selected.
- **Low administration**. Subscription licensing eliminates the need to track licenses for the selected products on every computer. This is especially helpful for managing software assets in a decentralized environment.
- **Current technology**. Subscription licensing allows your licensed users to run the most current version of the software products included in your subscription.
- **Simple budgeting and purchasing**. One annual payment covers all of the products you have selected for the year.
- **Excellent value**. By standardizing on a platform of products, you may reduce your total IT costs while helping to increase productivity and access to current technology. Software Assurance Membership (SAM) is included with your license coverage at no additional charge. You also receive one complimentary membership to the MSDN® Academic Alliance program.

Transactional Licensing
With transactional volume licensing programs, you acquire perpetual software licenses (meaning your institution has a perpetual, everlasting license) while eliminating the costs and packaging of retail software.

Microsoft has three transactional volume licensing programs for education customers: Microsoft Open License for Academic, Microsoft Select License for Academic (not available for new customers after July 1, 2011) and Microsoft Select Plus for Academic.

Open License for Academic
Open License for Academic is a widely accessible and cost-effective way for small education institutions to license Microsoft software, starting with as few as five licenses. You simply determine the number of software licenses your institution wishes to acquire and place the order with an authorized reseller. You also have the option to include Software Assurance with your licenses. After obtaining licenses, you can order installation

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media from a Microsoft-approved fulfillment source for a fee. License confirmations are distributed electronically and posted on a secure Internet site.

Select Plus for Academic Overview and Benefits

When it comes to licensing software and getting the most value from software investments, customers have asked for a Microsoft Volume Licensing solution that offers more flexibility, better asset management, and a way to balance growing technology needs with predictable costs.

Driven by customer research, Select Plus for Academic is for large education customers or aggregate groups (such as educational consortia) that want to acquire their software licenses and services at any affiliate level—such as a site or department—while realizing advantages as one institution.

Helping your institution get the most value from your software investment, Select Plus for Academic benefits includes:

Accessible, flexible purchasing
Select Plus for Academic uses a single, institution-wide agreement that supports both centralized and decentralized purchasing of licenses on an as-needed basis. Like the Campus and School Agreement, the Select Plus for Academic agreement has no specific end date and simplifies budgeting for short- and long-term IT needs.

Better manageability
With Select Plus for Academic, you will have far fewer agreements to track and manage. Because all affiliate purchases are tied to their own unique customer IDs, you will have a clear view of your entire license and software asset portfolio—either in a comprehensive report containing all affiliates or an individual report with the ability to drill down into a specific affiliate. New self-service tools also make it easier for you to register and access all the information you need about your agreement. And there is no need to renegotiate and renew agreements every three years with Select Plus for Academic.

Better returns with Software Assurance
Select Plus for Academic helps you maximize your return on investment (ROI) by giving you a full prorated value of your coverage when you acquire Microsoft Software Assurance, regardless of the timing of your purchase. Software Assurance is a comprehensive maintenance offering that helps you deploy, manage, and migrate software. It combines the latest software with 24 hour a day phone support, partner services, and the latest IT tools to help your institution increase productivity, accelerate performance, and realize a greater return on your software investment.

Select Plus for Academic Features

Beyond reducing the price that institutions pay for software licenses over full packaged product prices, Select Plus for Academic offers many other opportunities to help maximize the value institutions receive by participating in the program. Benefits include:

Reduced licensing complexity through:
- **Simplified licensing agreements**. Institutions are provided with a single agreement. This agreement has no specific end date, eliminating the need to renegotiate and renew every three years.

- **Affiliate purchasing**. Select Plus for Academic purchases are associated to a unique customer ID per affiliate. All purchases are tied to a single agreement and Lead Affiliate customer ID that allows organization-wide reporting or detailed affiliate level reporting.

Improved asset management with:
- **License management**. Enhanced self-service, online tools give customers and partners better management capabilities.
- **Downgrade rights**. Institutions can now standardize on versions. Downgrade rights offer the right to license the latest software version available, yet still run an earlier version.

Added value by offering ways to:
- **Realize more value from Software Assurance**. Institutions receive a full value for their benefits with proration of coverage to the purchase month, providing between 25 and 36 months of coverage.
- **Make a seamless transition**. The transition from Select License for Academic to Select Plus for Academic is simple, can be done on your timeline, and provides for seamless coverage for your Software Assurance investments.

Increased flexibility by:
- **Cross-language use rights**. These rights can help enhance an institution's appeal and effectiveness across geographic and cultural boundaries by ensuring that faculty, staff, and students from different countries can easily communicate. Note that you may not license in one language and deploy that licensed product in another language with a higher value.
- **Training and evaluation software licenses**. Save money on software training and evaluate new or unlicensed products by receiving license for:
    - 20 copies per software title for use in a dedicated training facility.
    - 10 copies per software title for a 60-day evaluation.
- **Re-Imaging rights**. Providing added convenience during product rollouts, these rights allow the use of certain licensed product media for copying of software onto multiple devices from one standard image.
- **Secondary use rights**. These rights can help increase productivity by allowing primary users of a licensed desktop computer to share the same application license with a portable computer (for work-related purposes only).
- **Home Use Program**. A benefit of Microsoft Software Assurance, the Home Use Program helps maximize productivity and flexibility by providing employees with Microsoft Office for home use. For each copy of Microsoft Office you license, the primary user of the computer may also run a second copy from either a laptop or desktop computer that he or she owns or leases. *Please note*: The software may be used only for work-related purposes as long as you have an active agreement. The Home Use Program does not apply to students unless the student is also an employee.

Please note: For complete details, reference the Select Plus for Academic agreement.

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Software Assurance with Select Plus for Academic

Microsoft Software Assurance for Volume Licensing helps boost productivity across your organization by enabling you to get the most out of your Microsoft software with 24x7 support, deployment planning services, end-user and technical training, and the latest software releases and unique technologies, all in one cost-effective program.

With Select Plus for Academic, you have the option to include Software Assurance with your software licenses. When you add Software Assurance, Microsoft will prorate your coverage to your third affiliate anniversary so you only pay for the coverage you are using, providing greater value for your Software Assurance coverage.

For information about Software Assurance benefits for academic institutions, please visit www.microsoft.com/softwareassurance.

Purchase Options for Software Assurance
The Spread Payments benefit for Software Assurance offers a more flexible way to manage technology expenditures by allowing you to spread payments annually over the term of the Software Assurance coverage. Select Plus for Academic offers both Affiliate Anniversary billing (similar to Agreement Anniversary billing) that allows you to spread payments annually, and Order Anniversary billing that allows you to spread payments over full-year increments. This can help reduce initial up-front costs and provide annual budget predictability.

You may also acquire Software Assurance on its own when:
- System or server software product licenses are acquired through retail full-packaged product (FPP) or from an original equipment manufacturer (OEM). There is a 90-day enrollment period during which time Software Assurance may be added to these purchases.
- Microsoft Office 2010 or newer version licenses are acquired through an OEM. Again there is a 90-day enrollment period during which time Software Assurance may be added to these purchases. The versions must be identical.

Microsoft Financing
The Microsoft Financing program helps customers by providing one financing resource for all their IT needs, including software, services, or your product offerings. For organizations that already license software from Microsoft, flexible payment options are convenient and allow them to spread out the costs of the software during an extended period of time, thus preserving cash resources.

Go to www.microsoft.com/financing for more information.

Extending Software Assurance Coverage
It is easy to continue the benefits enjoyed through Software Assurance after the initial term ends. Because Select Plus for Academic is an ongoing agreement that does not expire, Software Assurance may be extended through the existing agreement. When extending multiple Software Assurance licenses that were acquired through Select Plus for Academic at different times, the coverage period is adjusted to a common date, and the prices prorated to reflect the coverage period, in order to simplify management and facilitate annual budgeting cycles.

To ensure that upgrade protection remains uninterrupted through Software Assurance, you may extend Software Assurance coverage through your authorized reseller.

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If Software Assurance acquired under another program is about to expire, it may be renewed into your Select Plus for Academic agreement by working with your authorized reseller to obtain Software Assurance coverage under your Select Plus for Academic agreement.

In cases where Software Assurance coverage lapses, new License and Software Assurance purchases are required before Software Assurance may be acquired again.

To learn more about Software Assurance, visit www.microsoft.com/softwareassurance.

Student Select Plus

The Student Select Plus program provides Select Plus for Academic customers the ability to acquire licenses and media for a core selection of products and transfer them to students. These orders are placed using a Student Affiliate Registration form under the Select Plus for Academic agreement. *Please note:* Software Assurance is not available for licenses acquired through Student Select Plus.

As of March 31, 2012, institutions with existing Student Select and Student Select Plus enrollments can continue to offer products such as Project and Visio through the end of the agreement's term. However, no new enrollments will be accepted as of this date. All faculty offerings under Academic Select – including Microsoft Office Professional Plus, Office for Mac Standard and Microsoft Windows 8 Professional Upgrade - will remain unchanged.

As of April 1, 2012, students will no longer be able to purchase Office, Windows Upgrade, or Expression Studio licenses via the Student Select or Student Select Plus enrollments. However, there are other purchase options available for students to get Office, Windows, and Expression Studio, both retail and Volume Licensing. Institutions can enroll in the student option for either the Enrollment for Education Solutions (EES) or Open Value Subscription Agreement for Education Solutions (OVS-ES). Students can purchase retail academic versions at several retail locations or via the Microsoft Store at www.microsoftstore.com. Organizations should review www.microsoft.com/education/en-us/buy/Pages/index.aspx for all alternative options.

Select Plus for Academic Agreement Structure

The Microsoft Volume Licensing agreement structure makes it easier to negotiate the terms and conditions of multiple agreements. A Select Plus for Academic agreement has two components: (1) the agreement itself; and (2) the Select Plus affiliate registration form.

Select Plus for Academic Agreement. This agreement enrolls your institution in the Volume Licensing program so that you can license products and services at volume discount prices for education.

The Select Plus for Academic affiliate registration form. This one-page form identifies buying affiliates—such as individual campuses, departments, or members of an educational consortium or other aggregate group—within your organization and registers them in the program. As a result, they can acquire software licenses and services under the Select Plus for Academic agreement. The Large Account Reseller (LAR) that works directly with the affiliate is also identified on the affiliate registration form. Having a separate Select Plus for Academic agreement and Select Plus for Academic affiliate registration structure allows greater flexibility for registered affiliates, while providing a single, institution-wide licensing agreement with improved reporting and

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management. Although purchasing is conducted independently, all licenses are managed under one master agreement.

Affiliate Structure for Select Plus for Academic Agreements

With Select Plus for Academic, a single customer agreement and Lead Affiliate ID is established with the public customer number (PCN) of an institution's lead affiliate. The PCN is associated with the PCNs of any number of affiliates, linking them to the same agreement. This framework helps streamline purchasing, Software Assurance benefit delivery, and licensing reporting.

A Select Plus for Academic affiliate registration cannot be initiated without a Select Plus for Academic agreement.

Licensing Scenarios with Select Plus for Academic

The following scenarios can help you determine when Select Plus for Academic is right for your institution.

Scenario One:	With Select Plus for Academic:
A large university has multiple sites that purchase licenses for each department. The institution has signed a Campus Agreement to standardize the IT infrastructure with each affiliate purchasing licenses using a separate Select License agreement to support unique IT needs. This situation can create a few possible problems: • Purchasing can get out of control. • No easy way exists to accurately track and manage licensed assets. • Renewing multiple agreements occurs at different times, increasing administrative overhead. • Managing the procurement process takes time and can be costly.	The Campus Agreement remains the optimal way to standardize the desktop environment, and Select Plus is a great way to consolidate purchases across affiliates to take advantage of volume pricing and improved asset management. The university has a single, institution-wide agreement that does not have to be renegotiated and renewed. This enables: • Affiliate-level purchasing under a single master agreement. • A single Lead Affiliate ID to provide institution-wide purchase benefits and asset reporting. • License purchasing at both centralized and decentralized procurement locations. • Easy tracking and reporting on all licensed product assets across the institution—all the way to the affiliate level. • The new Microsoft Licensing Statement to combine all of your institution's software assets, including numbers for affiliates, in one report. • An institution-wide asset view to help determine how to efficiently deploy newly licensed products.

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Scenario Two:	With Select Plus for Academic:
A university's School of Architecture needs to buy multiple servers for a student services initiative that is scheduled to launch next semester. This situation creates a few problems: - The affiliate does not have time to negotiate a new contract. However, they do want to make sure that they receive the best price. - While the affiliate does not have the time to go to the top levels of the University for sign-off, they want the price advantage of being part of the institution. - They are under a tight deadline and are unsure that they can deploy the new servers soon enough.	The customer can purchase the server licenses through their Microsoft partner using a one-page affiliate registration form that is associated with a single institutional agreement. This means: - The affiliate's purchases count toward the institution's volume purchase requirements. - Because they have the software, they can either deploy or download and access the Volume Licensing Keys at the Microsoft Volume Licensing Service Center and launch the project without costly delays. - The university is satisfied because the affiliate got the best price and did not have to waste valuable time and money getting bids and negotiating their own agreement.

How to Get Started

Select Plus for Academic is offered through Large Account Resellers (LARs) that can help you evaluate your institution's needs to make the right choice. For more information about worldwide reseller locations, please refer to the reseller locator tool at http://pinpoint.microsoft.com/en-US/SelectCulture.aspx.

Select Plus Academic Pricing

Select Plus for Academic provides a single, special price level for qualifying academic institutions, which is set at a much more affordable level compared to commercial pricing. This pricing is the same as is offered through Select License for Academic. To verify your eligibility, please review the Qualified Education User Definition at www.microsoft.com/education/ww/buy/pages/volume-licensing.aspx.

To locate your regional Microsoft Volume Licensing website, go to www.microsoft.com/licensing/index/worldwide.mspx.

Establishing Price Levels for Select Plus Academic

Like Select License for Academic, Select Plus for Academic categorizes software products into three distinct product pools: applications, systems, and servers.

- **Applications.** Examples of Microsoft applications include Microsoft Office Professional 2013, Microsoft Lync 2013 client, and Microsoft Office Project 2013.
- **Systems.** An example of a Microsoft desktop computer operating system software program is Windows operating system upgrades such as Windows 8 Professional.
- **Servers.** Examples of Microsoft server software programs include the Windows Server operating system, Microsoft Exchange Server, Microsoft SQL Server database software, and associated Client Access Licenses (CALs).

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Each software product carries a point value. For example, Office Professional 2013 is worth 2 points, Microsoft Online Services Subscription is 1 point, and Windows Server Standard 2008 R2 is 15 points. The Software Assurance component of License & Software Assurance is worth half the total point value of its accompanying license annually. For example, if Office Professional 2013 is worth 2 points, Software Assurance is worth 1 point for each year it is maintained during the term of the Select Plus for Academic agreement, for a total of 3 points during the three-year term of the coverage (prorated between 25 and 36 months).

You can acquire points for each product pool with these three options:
- Acquire new Licenses.
- Acquire License & Software Assurance.
- Renew Software Assurance for products already covered with Licenses & Software Assurance from a previous order or where Software Assurance is purchased based on the eligibility rules.

The points you earn apply to all your affiliates registered under the agreement. For more information and to see a full product point list, please visit www.microsoftvolumelicensing.com/userights/PL.aspx.

Example Product List and Points

Applications Pool	Points	Systems Pool	Points	Servers Pool	Points
Office Professional Edition 2013	2	Windows 8 Professional Upgrade Edition	2	Windows Server 2012 Standard Edition	15
Lync 2013 client	1			Microsoft Online Services Subscription	1
Office Project 2013	1				

If you have an active Campus and School Agreement, you automatically meet the annual point minimums. Otherwise, you must meet the point minimums for each subsequent annual compliance check. If you purchase fewer than 500 annual points in a product pool for a given year, your account will be put on hold for that pool until you reach the 500-point level again. An order for the minimum annual points automatically reactivates the product pool, with no need to sign new forms or renegotiate the agreement terms.

How to Qualify for Select Plus for Academic

You can begin purchasing software licenses with Select Plus for Academic if you satisfy one of the following three qualifications:

Option 1. Qualify with an existing Campus and School Agreement.
When you associate your Select Plus agreement with an active Campus and School Agreement, you are **not** required to meet an annual minimum purchase quantity under Select Plus for Academic. When the associated licensed term for the active Campus or School enrollment under your qualifying Campus and School Agreement expires and is not renewed, you can still use your Select Plus for Academic agreement until the agreement anniversary date, at which time a compliance check of your organization's purchase history determines your ability to continue to purchase under your agreement.

Option 2. Qualify with a Volume Licensing agreement other than Campus and School Agreement.
If you have an existing Volume Licensing agreement other than a Campus and School Agreement (such as a Select License for Academic agreement), and have acquired 500 points or more over the past 12 months under that Volume Licensing agreement, you may qualify to start purchasing under a Select Plus for Academic agreement. To continue purchasing under a given product pool after your next agreement anniversary, you are

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required to reach an annual minimum of 500 points for that product pool. In general, if you have passed your most recent compliance check in the Select Program, you would be given the corresponding price level in Select Plus.

Option 3. Qualify as a new customer with a minimum purchase of 500 points.
If you do not qualify through an existing Volume Licensing agreement, you may start a Select Plus for Academic agreement by meeting the minimum purchase requirements during your first year. For each pool, in your first year of your Select Plus for Academic agreement you must meet a minimum of 500 points to continue purchasing in that pool. You can purchase under a single pool; however, if you purchase under multiple pools, you must qualify under each pool. To continue purchasing under a given product pool, you are required to reach an annual minimum of 500 points for that product pool.

Product Fulfillment

Media can be web-based downloads of Microsoft Volume Licensing Products from the Microsoft Volume Licensing Service Center, materials such as a CD-ROM or DVD for a licensed software product, and may also include printed materials such as a user's guide or product manual.

Digital by Choice
Through the Digital by Choice initiative, you have the option to access your licensed software digitally, instead of receiving physical media. By choosing this option, you help Microsoft in our efforts to reduce our carbon footprint by eliminating the need for discs, packaging, and shipping.

Please note: This is the default choice for all Volume Licensing programs (with the exception of the Microsoft ISV Royalty Licensing Program and Services Provider License Agreement). If you require physical media, you must complete a media order form. Your registered affiliates may choose their own media delivery preference (digital or physical). Registered affiliates that have chosen the physical media option will be shipped media for the specific products they order.

Volume Licensing Product Fulfillment Kits
If you choose to receive physical media for your licensed software, media kits are customized according to the languages specified on the Select Plus for Academic media form. Media is sent at no charge only for the licensed products ordered. The Welcome Kit and Update Kits are automatically provided to the contacts specified on the Select Plus for Academic agreement. Use the Product Fulfillment User's Guide website to help you manage the media kit. You can access these site features from the Microsoft Volume Licensing Service Center (VLSC) at https://www.microsoft.com/licensing/servicecenter/. You can also download the products from VLSC, or order additional media via your designated LAR.

Making Copies
With Select Plus for Academic, you can immediately reproduce and use Microsoft licensed products, as long as licenses are ordered for all copies of the deployed licensed products by the end of the month in which they were installed.

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Microsoft Volume Licensing Service Center

The Microsoft Volume Licensing Service Center (VLSC) makes it easy to manage your Volume Licensing agreements, download licensed products, and access product keys for your software—all in one place. Use VLSC to view your Microsoft License Statement, an easy-to-use report that provides a real-time calculation of Volume Licensing entitlements across agreements. You can also quickly identify and activate Software Assurance benefits. You can access the VLSC at https://www.microsoft.com/licensing/servicecenter/default.aspx.

Additional Resources

Microsoft offers detailed information about the Select Plus for Academic program and other Volume Licensing programs on the Microsoft Volume Licensing website at www.microsoft.com/licensing.

Qualified Education User definitions:
www.microsoft.com/education/ww/buy/pages/volume-licensing.aspx

To learn more about Software Assurance for academic institutions:
www.microsoft.com/licensing/software-assurance/default.aspx

Volume Licensing for Academic institutions:
www.microsoft.com/licensing/licensing-options/for-industries.aspx#tab=2

Microsoft Volume Licensing Service Center:
https://www.microsoft.com/licensing/servicecenter/default.aspx

Need help with Volume Licensing and product information? Call Now — Talk to a Microsoft Certified Licensing Sales Expert 08456 580 580

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