

Select Plus for Academic

Licensing guidance

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Microsoft Volume Licensing for academic institutions

For academic customers who license software in quantity and manage software across multiple devices, Microsoft Volume Licensing agreements is a cost-effective way to acquire licenses. Microsoft offers both “subscription” and “transactional” volume licensing agreements for academic institutions, including the Enrollment for Education Solutions, Select Plus for Academic agreement, Open License for Academic agreement, and Open Value for Education Solutions agreement. This guide covers the Select Plus for Academic agreement.

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. Microsoft Select Plus for Academic is for large academic institutions that want to acquire their software licenses and services at any affiliate level, while realizing advantages as one organization.

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

Accessible, flexible purchasing

- Select Plus for Academic uses a single, organization-wide agreement that supports both centralized and decentralized purchasing of licensed products on an as-needed basis. The agreement never expires and allows for consistent, predictable pricing that simplifies budgeting for short- and long-term projects.

Better manageability

- With Select Plus for Academic, you’ll have far fewer agreements to track and manage. Because all affiliate purchases are tied to their own unique customer IDs, you’ll 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. Self-service tools also make it easier for you to register and access all the information you need about your agreement. In addition, there is no need to renegotiate and renew agreements every three years with Select Plus for Academic.

Better returns with Software Assurance

- 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 organization increase business productivity, accelerate performance, and realize a greater return on your software investment. Select Plus for Academic helps you maximize your return on investment by giving you prorated value of your coverage when you acquire Microsoft Software Assurance, regardless of the timing of your purchase. Software Assurance is automatically prorated to your third affiliate account anniversary, eliminating the need to track multiple Software Assurance coverage expiration dates.

Select Plus for Academic features

Beyond reducing the price that organizations pay for software licenses over full packaged product prices, Select Plus for Academic offers many other opportunities to help maximize the value organizations receive when you purchase through the agreement. Benefits include:

Reduced purchasing complexity through:

- Simplified purchasing agreements. Institutions are provided with a single agreement that supports both centralized and decentralized purchasing of licenses on an as-needed basis. This agreement has no specific end date, eliminating the need to renegotiate and renew every three years and simplifying budgeting for short- and long-term IT needs.
- Affiliate purchasing. Select Plus for Academic purchases are associated to a unique customer ID per affiliate. You will have a clear view of your entire license and software asset portfolio, as 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. Self-service tools also make it easy to register and access all the information you need about your agreement.
- Downgrade rights. Organizations can now standardize on versions. Downgrade rights offer the right to license the latest software version available, yet still run a previous 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 third affiliate account anniversary, providing between 25 and 36 months of coverage.

Increased flexibility by:

- Cross-language use rights. These rights can help enhance an institution's global presence by ensuring that staff located in 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.
- 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).

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

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 benefits like the Microsoft Workplace Discount Program, 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 more 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 (similar to Agreement Anniversary) that allows you to spread payments annually and Order Anniversary

that allows you to spread payments over full-year increments. This can help reduce initial upfront costs and provide annual budget predictability.

Software Assurance may also be purchased on its own when:

- System or server software product licenses are purchased 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 2013 or newer version licenses are purchased 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.

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 orders that were purchased through Select Plus for Academic at contrasting 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 by placing a renewal order by the expiration date of your Software Assurance term.

If Software Assurance purchased under another agreement 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.

Select Plus for Academic agreement structure

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

Select Plus for Academic agreement. This enrolls your organization in the volume licensing agreement so that you can purchase products and services at volume discount prices for academic institutions.

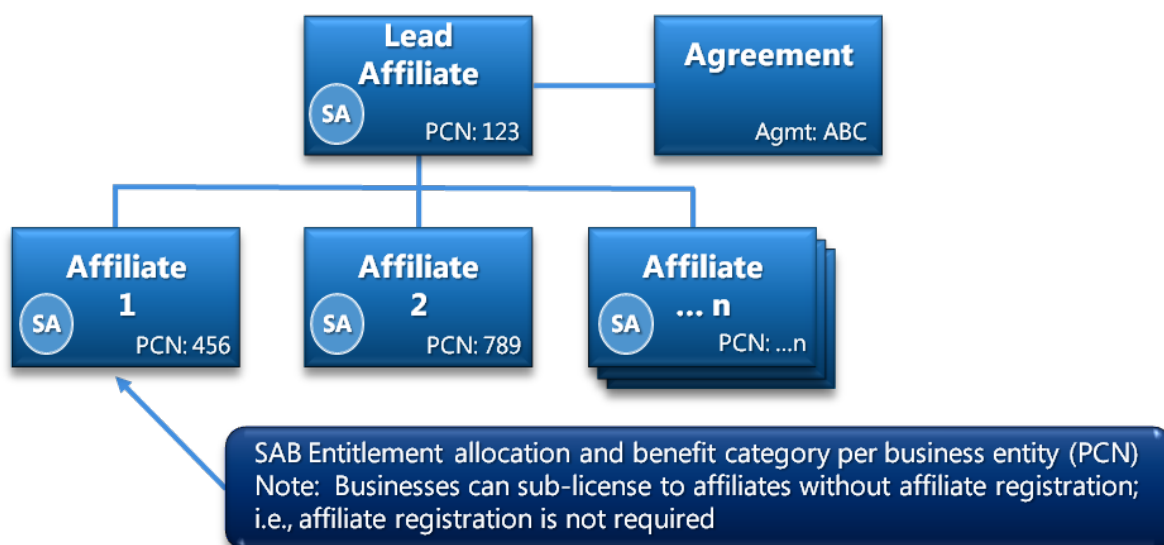
The Select Plus for Academic affiliate registration form. This one-page form identifies buying affiliates—such as individual campuses, departments, or members of an educational consortium or other aggregate group—within your organization and registers them in the program. As a result, they can acquire software licenses and services under the Select Plus for Academic agreement. The Licensing Solution Provider 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 located in different countries and regions, while providing a single, organization-wide purchasing agreement with improved reporting and 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 agreement and Lead Affiliate customer ID is established with the public customer number (PCN) of an organization'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 agreement cannot be initiated without an MBSA, and a Select Plus for Academic affiliate registration cannot be initiated without a Select Plus for Academic agreement.

Figure 1. Select Plus for Academic affiliate structure



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

A large university has multiple sites that purchase licenses for each department. The institution has signed a Campus Agreement with an Enrollment for Education Solutions 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.
- Decentralized purchasing can cause fragmentation, so there is 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.

With Select Plus for Academic

The Enrollment for Education Solutions remains the optimal way to standardize the desktop environment and Select Plus for Academic is a great way to consolidate purchases across affiliates to take advantage of volume pricing and improved asset management.

The university has a single, organization-wide agreement that does not have to be renegotiated and renewed. This gives them:

- Affiliate-level purchasing under a single master agreement.
- A single Lead Affiliate customer ID to provide organization- wide purchase benefits and asset reporting.
- Licensed product purchasing at both centralized and decentralized procurement locations.
- A single price level for all volume purchases with automatic, tiered volume discounting.
- Easy tracking and reporting on all software license assets across the organization—all the way to the affiliate level.
- The Microsoft Licensing Statement to combine all of the organization's software assets, including numbers for affiliates, in one report.

An organization-wide asset view to help determine how to efficiently deploy newly licensed products.

Scenario two

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 they get 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

With Select Plus for Academic

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 M365 admin center and launch the project without costly delays.

The university is satisfied because the affiliate got the best price and did not have spend time and money getting bids and negotiating their own agreement.

How to get started

Select Plus for Academic is offered through the Licensing Solution Provider channel that can help you evaluate your institution's needs to make the right choice. You can find a local partner at <https://appsource.microsoft.com/en-us/marketplace/partner-dir>.

Select Plus for Academic pricing

Eligible academic institutions receive special pricing, typically set at price level (Level A).

Academic eligibility definitions vary by region. Academic eligibility requirements are available at <https://www.microsoft.com/licensing/docs>.

To find your regional Microsoft Volume Licensing website, go to <https://www.microsoft.com/en-us/licensing/worldwide>.

Product pools and points

Select Plus for Academic categorizes software products into three distinct product pools: applications, systems, and servers. While there is one price level for eligible academic institutions, you must still purchase a minimum of 500 points per pool to maintain an active agreement.

Applications. Examples of Microsoft applications include Microsoft LTSC Office Professional Plus, Microsoft Skype for Business, Visio LTSC Professional 2024, and Microsoft Outlook.

- **Systems.** An example of a Microsoft desktop computer operating system software program is Windows operating system upgrades such as Windows Pro.
- **Servers.** Examples of Microsoft server software programs include the Windows Server Essentials, Exchange Server, System Center Endpoint Protection 1606, and associated Client Access Licenses (CALs).

Each software product carries a point value. For example, Office Professional Plus is worth 2 points, a Microsoft Online Services Subscription is 1 point, and Windows Server Essentials is 5 points. The Software Assurance component of License & Software Assurance is worth the delta between the total point value of the License and Software Assurance half the total point value of its accompanying license annually. For example, if Office Professional Plus is worth 2 points and the License plus Software Assurance is 4 points, Software Assurance is worth 21 points for each year it is maintained during the term of the Select Plus 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.

Your organization will automatically move to a lower price level whenever one of these events occurs:

- You increase the amount you spend through your Select Plus for Academic agreement and purchase enough points to take you to the next price level.
- You associate your Select Plus for Academic agreement with an existing Enterprise Agreement, Campus and School Agreement, or Select License agreement that has a lower price level.

The points you earn apply to all your affiliates registered under the agreement.

For more information and to see a full product point list by software category, please visit <https://www.microsoft.com/licensing/terms/productoffering/software>.

Annual point minimum

If you purchase below the annual 500-point minimum in a product pool during any 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.

Purchases made under your Select Plus for Academic agreement by registered affiliates are aggregated and continuously factored into point minimums per pool to maintain purchasing ability. Product pools are reviewed every year on the agreement anniversary date.

If your Select Plus for Academic agreement is associated with an active Campus and School Agreement, you do not need to comply with annual point minimums. However, if your Select Plus for Academic agreement has been associated with a Select License or other volume licensing agreement to set the initial price level, you must meet the point minimums for each subsequent annual compliance check.

How to qualify for Select Plus for Academic

There are three ways you can qualify for a Select Plus for Academic agreement:

- **Option 1.** Qualify with an existing enrollment under a Campus and School Agreement. When you associate your Select Plus for Academic agreement with an active enrollment under a qualifying Campus and School Agreement contract, you are not required to meet an annual minimum purchase quantity under Select Plus for Academic. When the associated enrollment under the Campus and School Agreement expires and is not renewed, you can still receive the corresponding price level on Select Plus for Academic until the Select Plus for Academic agreement anniversary date, at which time a compliance check of your institution's purchase history determines your ability to continue to purchase under your Select Plus for Academic 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, 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 required to reach an annual minimum of 500 points for that product pool.

- **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 reach an annual minimum of 500 points under each pool. You are subject to annual compliance checks.

Additional resources

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

To learn more about Software Assurance:

www.microsoft.com/softwareassurance

Qualified Education User definitions:

<https://www.microsoft.com/licensing/docs>

Volume licensing for academic institutions:

<http://www.microsoft.com/en-us/licensing/licensing-programs/licensing-for-industries.aspx#tab=2>

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