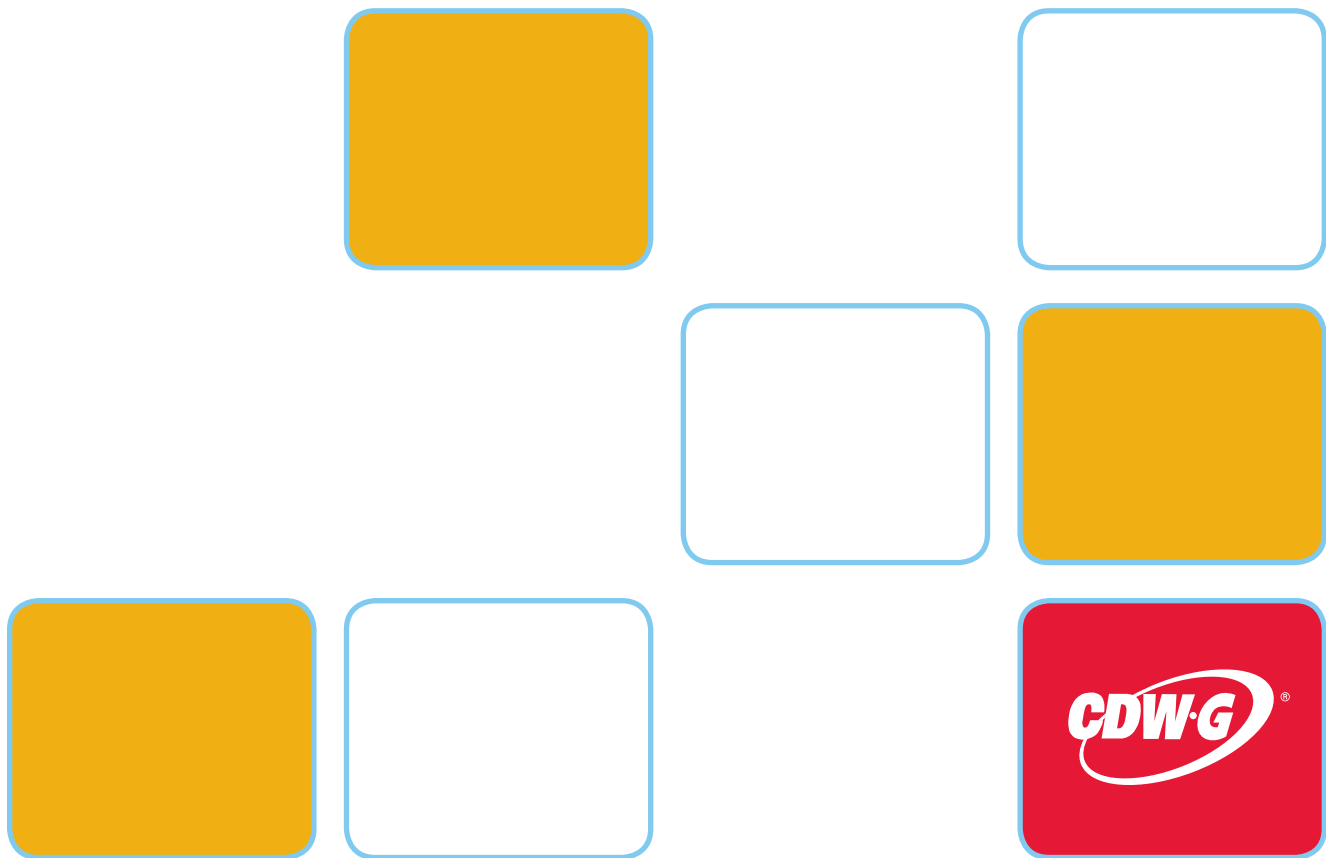




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Volume Software Licensing Reference Guide *for Education*





## Microsoft Academic License Programs

For education customers who purchase software in quantity and manage software across multiple computers, purchasing through Microsoft's various licensing programs is an effective way to reduce the total cost of software ownership. Customers meeting the criteria below are eligible to acquire Microsoft Academic Edition products in the programs indicated and are defined as qualified educational users:

- Educational institutions
- Administrative offices and Board of Education
- Teachers, faculty and students
- Higher education students
- Public libraries
- Home school programs

Microsoft academic license programs offer education customers the choice between transactional, contractual and subscription programs.

**Transactional licensing**—With transactional licensing programs, you acquire perpetual software licenses (meaning your school owns the licenses) while eliminating the costs and packaging of retail software.

- Microsoft Academic Open License

**Contractual licensing**—Contractual licensing provides volume licensing for medium and large institutions with 250 or more PCs who are able to forecast their licensing needs over a 3-year period.

- Microsoft Academic Select License

**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. Even if the numbers of PCs or users grow, you remain fully licensed throughout the designated term.

- Microsoft School Agreement
- Microsoft Campus Agreement

**Microsoft Academic License Programs**

Name of program	Microsoft Academic Open License	Microsoft Academic Select License	Microsoft School Agreement	Microsoft Campus Agreement
Type of program	Transactional	Contractual	Subscription	Subscription
Minimum purchase requirements	5 licenses	1500 points	300 points	300 points
Minimum re-order requirements	1 license	1 license	300 points	300 points
Media included	No, media must be purchased separately	Yes, media is included	Yes, media is included for desktops only	Yes, media is included for desktops only
Forecasting requirements	No	Yes	Yes	Yes
Signed contract requirements	No	Yes	Yes, subscription and Master School Agreement must be signed	Yes, subscription and Master Campus Agreement must be signed
Length of program	2 years	3 years	Annual agreement with 3-year option	Annual agreement with 3-year option
Upgrade protection	Yes, Software Assurance can be purchased	Yes, Software Assurance can be purchased	Yes, Software Assurance is included	Yes, Software Assurance is included
Technical support	Yes, Microsoft provides free Web support and fee-based phone support	Yes, technical support can be purchased separately	Yes, technical support can be purchased separately	Yes, technical support can be purchased separately

## Microsoft Academic Open License

Microsoft Academic Open License program is a flexible license program for institutions of all sizes which provides savings off retail of Microsoft software, while giving you the benefits of an innovative volume-based license program. It is an easy way to acquire and administer multiple copies of software. Plus, you will also receive license confirmations quickly and conveniently.

### Benefits:

- Easy to understand and administer with simple, clear terms for acquiring software licenses
- Flexible enough to meet the needs of a broad range of organizations; you can choose from a wide selection of products, and after an initial order of 5 or more licenses, you may re-order as few as 1 license, so you order only what you need
- Receive license information quickly with eOpen
- CDW•G Software License Tracker partner—automatically view and manage all of your Microsoft software purchases through your CDW•G extranet account; log on to learn more

### Program Details:

In order to initiate a Microsoft Academic Open License agreement, you must meet the minimum acquisition requirement of five licenses. This may include licenses in any combination.

### Ordering:

There is no minimum for re-orders, so you can submit orders for as few as one license and receive the volume discounted price established by your agreement. An authorization number is assigned by Microsoft when you initiate a new Microsoft Academic Open License agreement (or initial order). The authorization number allows Microsoft to track certain information, such as the expiration date of the 24 full calendar month term and customer type. The authorization number is used for re-orders, affiliate purchasing and license tracking.

### Deliverables:

Microsoft provides electronic delivery of Microsoft Academic Open Licenses through the eOpen Web site. eOpen is a proprietary Web-based solution that reflects Microsoft's record of your license status. The secure license site has been developed to help you manage your Microsoft Academic Open License purchases.

### eOpen Benefits:

- Immediate authorization to begin copying software and deploying software licenses
- Ability to electronically track transactions online
- Easy access to transaction history including acquisitions, re-orders and returns

- Reduction of administrative costs associated with manually tracking license certificates and software compliance
- Utilization of the Internet to take advantage of online technology

Microsoft Academic Open License comparison		
	Initial Orders Under an Academic Open License Agreement	Re-orders Under an Academic Open License Agreement
Length of program	2-year term begins with each new order on a new authorization number	Year term begins with initial order only
Online (eOpen) tracking	Set up a new log on to view licenses online	Return to eOpen using current log on to view additional licenses purchased
Parent/subsidiary and affiliate relationship	Parent or other related entity must place initial order to set price level	Parent or affiliate may use same authorization numbers for re-orders
Minimum purchase requirements	5 licenses	1 license
Upgrade protection	Full 2-year Software Assurance coverage from initial order	Length of Software Assurance coverage expires at the end of the authorization number started with the initial order

## Microsoft Academic Select License

The Microsoft Academic Select License provides volume licensing for institutions with approximately 250 or more PCs who are able to forecast their volume license needs over a 3-year period. Your school will receive a volume price level for each pool of products selected (applications, systems and /or servers). Each product within the Microsoft Academic Select License has a point value assigned to it which allows you to establish a discounted price level by meeting a minimum forecast of license acquisitions. You will receive a complimentary CD-ROM Kit containing the products covered by the agreement. Your organization may immediately reproduce and use these products based upon licenses acquired.

### Benefits:

Microsoft Academic Select License offers you a flexible, volume-based program that gives your organization a simple way to order and acquire licenses. This program is a monthly transaction model where you will receive regular confirmations of new licenses.

- Easy to understand and comply with—simply acquire and pay for the License or License & Software Assurance as needed
- Obtain software for training purposes—receive up to 20 copies for most Microsoft products
- Retain investment value—through Software Assurance, you can easily stay current with your software products
- CDW•G Software License Tracker partner—automatically view and manage all of your Microsoft software purchases through your CDW•G extranet account; log on to learn more

### Program Details:

Qualifications for Microsoft Academic Select License is determined by a forecast of the number of licenses that you plan to acquire over a 3-year term of the agreement. Each year, on the anniversary of your agreement, your license acquisition for the proceeding 12 calendar months will be reviewed to ensure it is meeting forecast requirements.

On an annual basis, Microsoft will review your actual acquisition history for the proceeding 12 months against the forecasted price level for each product pool. For the first review, Microsoft will check the acquisition history to determine whether 1/3 of the forecast was met. This process will be repeated at the 24-month milestone. If you have purchased less than the milestone quantity of the 3-year forecast, then the agreement will be terminated for the relevant product pool(s).

### Product Availability:

There are three product categories, called pools, from which you may elect to acquire software licenses—applications, systems and servers. The point minimums per product pool can be satisfied by acquiring a new License, the License & Software Assurance package or the Software Assurance part number for products previously covered with Software Assurance. There is a specific point value for each Microsoft product. In some cases, a single product license equates to more than one point. A point value of two does not mean that you will receive two separate licenses—it means you will receive two points toward the forecast requirement. You may not combine point values for licenses acquired across pools.

**Applications Pool**—consists of Microsoft products such as Microsoft Office 2003, Excel, Project, Publisher, Visual Studio and Word

**Systems Pool**—consists of the Windows Professional upgrade for Microsoft desktop operating system products such as the Microsoft Windows XP operating system

**Servers Pool**—consists of Microsoft products that run on network servers such as Microsoft Windows 2003 and server Client Access Licenses (CALs)

### Minimum points required for Microsoft Academic Select, Level A:

End of year 1—500

End of year 2—1000

End of year 3—1500

### Product pool points for Microsoft Academic Select:

#### Applications

Office 2003—2

Excel—1

Project—1

#### Systems

Windows XP Professional Upgrade—2

#### Servers

Windows 2003 Server—15

Windows 2003 Client—1

#### Ordering:

The Microsoft Academic Select program offers a variety of ways to acquire and purchase licenses.

1. Pay for licenses at the time of acquisition
2. Split payments of Software Assurance or License & Software Assurance into equal payments for the balance of the term—when you choose this option, Microsoft will break down the price of the Software Assurance or the License & Software Assurance license into payments based on when the acquisitions were made

#### Deliverables:

Upon receipt of your enrollment, Microsoft will send a CD-ROM Kit to the contact listed. The kit contains CDs with all the products offered to date by the Microsoft Academic Select License program. Enrolled affiliates will automatically receive a CD-ROM Update Kit every month until the end of the agreement.

### Microsoft School Agreement

Microsoft School Agreement is an annual, subscription licensing program specifically created to address the unique needs of primary and secondary schools and districts. With the simplicity of counting computers just once per year, Microsoft School Agreement makes it easy for you to license all of your computers, whether in a single school or throughout the entire district.

It is easy for your school to subscribe to the license coverage needed on an annual basis without the hassle of revisiting your terms and conditions each year. An umbrella agreement, called the Master School Agreement, contains the terms and conditions that dictate the use of software and has no expiration date. Once you sign the Master School Agreement, you can place an order for 12 months of license coverage by submitting a subscription order form to your CDW•G account manager.

### Benefits:

- Low administration—subscription licensing eliminates the need to track licenses for individual Microsoft School Agreement products on every computer
- Stay current on technology—with subscription licensing programs, your users are licensed to run the most current version of the software products included in your agreement, and your institution automatically receives media for products that upgrade during your agreement term
- Optional 3-year subscription which locks your current year pricing for the next 3 years

### Program Details:

Because you license all of your school's users and computers for the products selected, the Microsoft School Agreement makes it easy for administrators to know that the software use is compliant. Your students are also licensed to use the Microsoft School Agreement software in classrooms or in labs.

### Program Eligibility:

In order to purchase a Microsoft School Agreement subscription, you must meet the definition of a Qualified Educational User. In the United States, a K-12 school must be organized and operated exclusively for the purpose of teaching its students and accredited by one of the Regional Institutional Accrediting Agencies recognized by the U.S. Secretary of Education. Hospitals, healthcare systems and research laboratories do not qualify for this subscription.

### Aggregate Groups/Consortia

In order to assure that they are prepared to provide their members with the necessary information regarding the terms and conditions of their agreement, special approval from Microsoft is required for aggregate groups (such as a consortium of school districts) to enter into a Microsoft School Agreement subscription. Please call your CDW•G account manager for more details.

### Purchase Requirements:

With the Microsoft School Agreement, you have the ability to select the individual product(s) you want to license through your subscription. Pricing for desktop and CAL products is based on a count of your eligible PCs and requires institution-wide coverage of the products selected. In addition, when submitting a subscription order form, it must be for a minimum of 300 product units. The total units per order are determined by combining your desktop and CAL units with your server units. You can choose any individual product or combination of products to meet this requirement.

### Counting Eligible PCs

The Microsoft School Agreement requires an institution-wide commitment for any desktop and CAL product(s) selected. You must include all of the eligible PCs in the participating school or district.

Eligible PCs include all of the Intel Pentium machines (including similar machines with AMD Athlon and Power PC processors in Power Macs, eMacs and iMacs). You must also include any number of 486 machines or below and any Apple, UNIX or Windows Terminals on which software will be run.

Pricing level	PC number
Level A	Less than 2500
Level B	2500 or more

### Calculating Desktop and CAL Units

To determine your desktops and CAL units, multiply the total number of desktops and CAL products selected by your total number of eligible PCs. Unit values for desktops and CAL products are not weighed—each has a unit value of one.

#### Example:

3 (number of desktops and/or CAL products selected)  
X 100 (number of PCs)  
= 300 (desktops and/or CAL units)

Note: you cannot select desktop and CAL products for only a portion of the PCs included in your subscription. Pricing is set to reflect the typical use rates for each product.

### Calculating Server Units

For server products, you multiply the unit value for the server product by the number order. Each server product is assigned a unit value. Call your CDW•G account manager for details.

### Product Availability:

When placing an order, you choose the products you want to include with your agreement subscription. You can submit additional orders if you want to add products to your coverage during the licensed term. Any new subscription order form will initiate a separate subscription with its own effective start and end date.

### Student Option Licensing:

Your school can extend the benefits of the Microsoft School Agreement to its students. The Student Option allows students to use the software on a personally-owned computer or on a school-owned computer designated for a student's exclusive use.

With the Microsoft School Agreement Student Option, you license a specific number of students. This number cannot be changed over the course of the subscription. If you choose a 3-year subscription, each annual follow-up subscription order form must include at least the same number of students as in the previous years.

## Deliverables:

Upon activation of your subscription, you will automatically be shipped one complimentary product Welcome Kit containing CDs needed to deploy the Microsoft School Agreement subscription products. You are authorized to install only the products included in your specific subscription. You will also be registered for one complimentary update subscription.

## Conditions:

The Master School Agreement contains the terms and conditions and has no expiration date. The license coverage corresponding to your subscription order form has a 12-month or optional 36-month term. In addition, you may use the buy-out option to acquire perpetual licenses for only the products and quantities that you wish to continue using.

Unit Value of Server Products	
Server product	Unit value
Exchange Server Standard	15
Exchange Server Enterprise	30
SharePoint Portal Server	65
SQL Server Standard	15
SQL Server Standard Processor License	50
SQL Server Enterprise	30
SQL Server Enterprise Processor License	125
Systems Management Server	15
Windows Advanced Server	30
Windows Server	15
Host Integration Server Processor License	25
ISA Server Standard Processor License	25
ISA Server Enterprise Processor License	75
BizTalk Server Standard Processor License	50
BizTalk Server Enterprise Processor License	200

## Microsoft Campus Agreement

The Microsoft Campus Agreement is an annual subscription licensing program specially created to address the unique needs of higher educational institutions. The Microsoft Campus Agreement lets you keep your institution's technology up to speed—even on a limited budget.

It is easy for your school to subscribe to the license coverage needed on an annual basis, without the hassle of revisiting your terms and conditions each year. An umbrella agreement, called the Master Campus Agreement, contains the terms and conditions that dictate the use of software and has no expiration date. Once you sign the Master Campus Agreement, you can place an order for 12 months of license coverage by submitting a subscription order form to your CDW•G account manager.

## Benefits:

- Easy compliance—because all of your institution's computers and users are licensed for the term of the agreement, it is easy to be sure that your institution is fully licensed for the use of Microsoft Campus Agreement products you selected
- Low administration—subscription licensing eliminates the need to track licenses for individual Microsoft Campus Agreement products on every computer
- Stay current on technology—with subscription licensing programs, your users are licensed to run the most current version of the software products included in your agreement, and your institution automatically receives media for products that upgrade during your agreement term
- Optional 3-year subscription which locks your current year pricing for the next 3 years
- Can have multiple subscription order forms submitted simultaneously

## Program Details:

Since you license all of your institution's users and computers for the products selected, the Microsoft Campus Agreement makes it easy for administrators and users to know that the software use is compliant. Although you report a specific staff count when submitting your subscription order form, your institution is licensed for any new faculty and staff members employed by the institution during the 12 month term. If you include your entire institution in your Microsoft Campus Agreement, your students can use the software on computers in classrooms or in open labs.

## Program Eligibility:

In order to purchase a Microsoft Campus Agreement subscription, you must meet the definition of a Qualified Educational User. In the United States, a higher education institution must be organized and operated exclusively for the purpose of teaching its students and accredited by one of the Regional Institutional Accrediting Agencies recognized by the U.S. Secretary of Education. Hospitals, healthcare systems and research laboratories do not qualify for this subscription.

## Aggregate Groups/Consortia

In order to assure that they are prepared to provide their members with the necessary information regarding the terms and conditions of their agreement, special approval from Microsoft is required for aggregate groups (such as a consortium of independent colleges) to enter into a Microsoft Campus Agreement subscription. Please call your CDW•G account manager for more details.

## Purchase Requirements:

With the Microsoft Campus Agreement, you have the ability to select the individual product(s) you want to license through your agreement. Pricing is based on a count of your total faculty and staff

Full-Time Equivalent (FTE) and requires organization-wide coverage of the products selected.

When submitting a subscription order form, it must be for a minimum of 300 units. Total units per order are determined by multiplying the total number of products selected by your total FTE calculation. You can choose any individual product or combination of products to meet this requirement.

### Calculating Server Units

For server products, you multiply the unit value for the server product by the number order. Each server product is assigned a unit value. Call your CDW•G account manager for details.

### Product Availability:

When placing an order, you choose the products you want to include with your agreement subscription. You can submit additional orders if you want to add products to your coverage during the licensed term. Any new subscription order form will initiate a separate subscription with its own effective start and end date.

Note: you are not licensed to run additional copies of server products if you acquire additional server machines during the subscription term. You must submit a new subscription order form for any additional server products you need to license during your term.

### Student Option Licensing:

When submitting a subscription order form, you may include the Student Option. With this option, students are licensed to use a selection of products on a personally-owned computer or an institution-owned computer designated for a student's exclusive use.

With the Microsoft Campus Agreement Student Option, you license 100% of your students. If you select the Student Option, you should include all student employees in your enrollment. Student employees who are included in the Student Option coverage may be excluded from the faculty and staff FTE count. You may also exclude students who are non-knowledge workers and do not access a computer to perform their work.

Your student FTE count and the respective product selection for those students must meet the minimum of 300 units. You cannot combine your faculty, staff and student purchases to meet the minimum requirement. Both minimums must be met individually.

### Deliverables:

Upon activation of the subscription, you will automatically be shipped one complimentary product Welcome Kit containing CDs for all of the Microsoft Campus Agreement products. You are authorized to install only the products included in your specific subscription. You will also be registered for one complimentary update subscription.

### Conditions:

The Master Campus Agreement contains the terms and conditions and has no expiration date. The subscription order form has a 12-month or an optional 36-month term. If you choose the optional 3-year term and comply with the ordering requirements as described in this program, per-unit pricing will remain constant for all software products ordered during your licensed term. Note: your actual annual pricing is determined by your CDW•G account manager. For this reason, the final per-unit pricing cannot be guaranteed for years two and three of the agreement and is subject to change. Please call your CDW•G account manager to discuss the 3-year option and pricing details.

Unit Value of Server Products	
Server product	Unit value
Exchange Server Standard	15
Exchange Server Enterprise	30
SharePoint Portal Server	65
SQL Server Standard	15
SQL Server Standard Processor License	50
SQL Server Enterprise	30
SQL Server Enterprise Processor License	125
Systems Management Server	15
Windows Advanced Server	30
Windows Server	15
Host Integration Server Processor License	25
ISA Server Standard Processor License	25
ISA Server Enterprise Processor License	75
BizTalk Server Standard Processor License	50
BizTalk Server Enterprise Processor License	200

### Software Assurance

Microsoft's Software Assurance program offers additional enhancements. Software Assurance gives you the rights to run new versions of licensed software as they become available during the term of your agreement. You can reduce the costs associated with acquiring new version releases and avoid lengthy purchasing cycles, while still reaping the benefits of technology that help your organization.

The next generation of Software Assurance includes more features for the same price, including business-hour problem resolution support for covered server products, access to Managed Newsgroups and Online Concierge Chat and Microsoft's self-paced training courses. Desktop and server offerings include different features. In addition, different software licensing programs are eligible for different program benefits. If you are a Software Assurance Member (SAM), you receive extra benefits. To become a SAM, you agree to purchase Software Assurance with every license.

## Software Assurance enhancements for desktops:

### ***New Version Rights***

These rights give you access to new releases of software versions as they become available during the agreement term.

### ***Spread Payments***

You now have the ability to spread out payments annually which reduces initial investment and enables budget forecasting up to three years in advance.

### ***Home Use Program***

Users receive rights to Microsoft Office systems products to install on their home computers for both personal and work needs. Microsoft Office systems include Microsoft Office Suite, FrontPage, InfoPath, OneNote, Project, Publisher and Visio.

### ***TechNet Online Concierge Chat***

TechNet Online Concierge Chat is an assisted search session and self-help resource available through premium content Web site access. This provides the most up-to-date IT information to help facilitate software deployment.

### ***Windows Preinstallation Environment (WinPE)***

WinPE is a tool-based Microsoft Windows XP Professional utility that speeds deployment through automation so you can build custom solutions, keep desktops updated and increase productivity by running Windows setups, scripts and imaging applications.

### ***eLearning***

eLearning is self-paced desktop training for users of Microsoft software to help update their skills with the latest knowledge.

## Software Assurance enhancements for servers:

To access these enhancements, you are required to have Software Assurance on both the server product and CAL. The benefits are the same as for desktops on New Version Rights, Spread Payments, TechNet Online Concierge Chat and WinPE.

### ***TechNet Plus***

TechNet Plus provides access to Web-based support with Online Concierge, premium content, plus Managed Newsgroup Support and TechNet Plus Subscription Media. It provides extensive, up-to-date IT information, service packs, hot-fixes and more. TechNet Plus also offers monthly access to tools, utilities, drivers and articles.

### ***Extended Lifecycle Hot-fix Support***

If you are using previous versions of Microsoft products, the time frame to sign up for non-security hot-fix support has been extended from 90 days to two years. There is no need to sign an upfront contract or pay an initial fee for extended support until you determine a need.

### ***Corporate Error Reporting***

This gives you control over what data is sent to Microsoft to provide a clear and easy-to-use view of your error data. It also identifies which systems are failing and why, maps solutions to crashes, connects you to up-to-date knowledge and fixes that will give you actionable information when escalation is required.

### ***Microsoft Reliability Services***

Microsoft Reliability Services allow you to monitor the reliability of your servers to address uptime issues. Its reliability reporting evaluates historical data to provide consistent reliability measurements.

### ***eLearning***

The server version of eLearning Training is for users on Microsoft Windows Server, Exchange Server and SQL Server. It offers self-paced instructional modules that can be conveniently accessed at your own PC, even offline, so that you can keep up-to-date on your skills.

# Microsoft Licensing FAQs

## Q. What is a Client Access License (CAL)?

A. If your agency's workstations are networked, you will utilize a network server and the workstations on the network will access that server's software to perform certain functions such as file and print sharing. In order to legally access this server software, a client access license or CAL may be required. A CAL is not a software product; rather it is a license that gives you the right to access the services of the server. Due to the technical nature of server products, CAL licensing can be a complicated area. Please consult your CDW•G account manager to help you determine your organization's need for CAL licenses.

## Q. What is Per Seat licensing?

A. With Per Seat licensing, any number of licensed computers and/or devices can be used to connect to the server. However, you must purchase CALs for each client computer and/or device where access to services is needed such as file and print, or Microsoft server applications. Per Seat licensing is available for Windows Server, Exchange Server, SQL Server, Systems Management Server and SharePoint Portal Server.

## Q. What is Per User licensing?

A. Through Per User licensing, you will need a CAL for every named user accessing your server from any device. A Per User CAL may make the most sense for an organization with many roaming employees who need access to the network from unknown devices and/or employees who access the network via multiple devices.

## Q. What is Per Device licensing?

A. Through Per Device licensing, you will need a CAL for every device accessing your server. This device can be used by any user. A Per Device CAL may be most beneficial economically and administratively for an organization with multiple users for one device, such as a job application kiosk.

## Q. What is Per Processor licensing?

A. Some Microsoft server products are available Per Processor. Under the Per Processor licensing model, you acquire a Per Processor license for each processor in the server on which the software is running. A processor license includes access for an unlimited number of users to connect from either inside the local area network (LAN) or wide area network (WAN) or outside the firewall. You do not need to purchase additional server licenses or CALs.

## Q. What is Per Mailbox licensing?

A. If you are a government customer using Microsoft Exchange Server, you have the additional option of deploying licenses in Per Mailbox mode. With this model, you acquire one CAL for each unique mailbox accessing the Microsoft Exchange Server. If you choose the Per Mailbox licensing, you may not change to Per Seat licensing later. However, if you initially choose the Per Seat licensing, you may transition one time only to Per Mailbox licensing. This choice is then permanent.