SPLA REPORTING GUIDE

Instructions for monthly usage reporting under the Microsoft SPLA Program

- ✓ **Reporting Due Dates**- Reports are due to Insight by the 10th of every month with prior month usage.

- ✓ **Reporting Reminders**- Insight will send an automatic reporting reminder email on the 1st, 14th, and 28th of each month.

- ✓ **Pricing**-   There is no pro-rated pricing. The pricing you will see at the web page is monthly cost- per Subscriber Access license (SALs), per Processor licenses (Proc),and per Core license (Core)

- ✓ **Monthly Reporting**- You should report usage for each product you are utilizing in your configuration to deliver a service. For reporting and calculating payment, usage refers to each assigned Subscriber Access License or Core or Processor License whether or not the software is actually accessed or used.

- ✓ **Microsoft's Return Policy**-   the return policy allows 60 days to request returns/adjustments/credits for products that were misreported (i.e. over reported, product reported in error). Request made after 60 days cannot be considered/approved because it will be outside of the Microsoft compliance guidelines.

- ✓ **Service Provider User Rights (SPUR)-** Please refer to Microsoft's Service Provider User Rights (SPUR) for details on how each product is licensed, including the terms and conditions governing service provider use rights and reporting requirements:

Online SPUR Tool

Please click here to view the tool: http://www.microsoft.com/licensing/spur/products.aspx

Online SPUR At-A-Glance
- Customize a SPUR report based on ONLY the product(s) you need and require
- Individual product-level of granularity
- View Output reports online or download a custom Word .doc
- Archive record for past SPUR documents

Step-By Step Reporting

Following are step-by-step highlights of the new process for SPLA reporting. We highly encourage you to watch the video on your welcome page at https://www.insight.com/ which shows you how to submit a

SPLA monthly usage report. The instructions include steps for your first usage report as well as Tips and Tricks for repeat reporting.
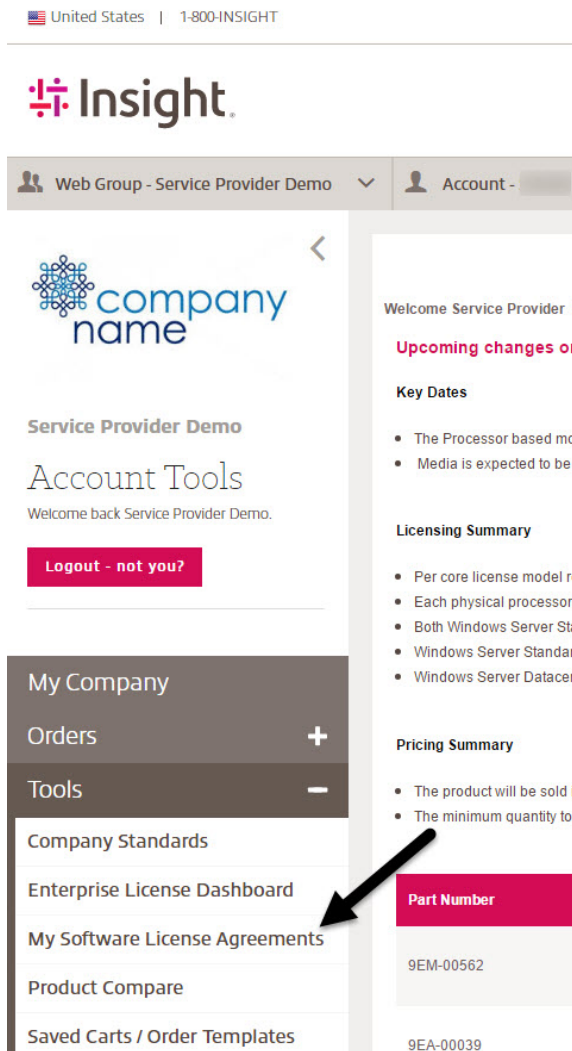
Reporting Your First Usage Report on Insight.com

There are two ways you can create your SPLA usage report for the first time, one is by browsing SPLA parts under your License Agreement and the second is by doing individual part searches using our Keyword Search box

Browsing for Parts to Report Usage

1. From the Account tools menu under Tools select **My Software License Agreements.**

2. Once on your Software License Agreements page click View Products.

3. This displays a list of all parts under the Agreement including a Zero Usage sku. If needed use the **Narrow Results** field on the left to narrow results to find specific parts.

4. If the display contains a part for which you wish to report usage click Add to Cart. A pop up displays enabling you to review the part added. From here you can continue to the cart by clicking Continue to Checkout or select Continue Shopping to return to search results to add additional parts.

Using Keyword Search to Find Parts to Report Usage

You can also find parts using the Keyword Search box located in the upper right at the top of the page. You can click the magnifying glass icon to start a search.

1. If needed use the **Narrow Results** on the left to narrow results to find specific parts.

Search field view after clicking search icon:

2. If the display contains a part for which you wish to report usage click Add to Cart. A pop up displays enabling you to review the part added. From here you can continue to the cart by clicking Continue to Checkout or you can select Continue Shopping to return to search results to add additional parts.

Adjusting Quantities and Other Cart Reporting Functions

Once in the cart you can adjust the quantities for each item and then click **"Update"** to update the total amount of all lines. Should you need to add additional parts you can use **Quick shop** to enter additional Part Numbers without leaving the cart. When ready click **Proceed to checkout** (you will still have an opportunity to review your order).

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Web Group - Service Provider Demo   ∨   👤 Account -   ∨

Cart

Continue shopping ▾   ⊠ Export as a file | ✈ Send to a colleague | 🖶 Print

Please review the contents of your cart below to ensure your order is correct. Click Proceed to checkout when you have finished shopping.

Usage Reporting

⚠ Your usage reporting is due for the following months: July. Please submit one order per missing month.

Report usage for: **July 2017**   Report zero usage for this period

Enrollment #: 987654321

Your cart 2 items				Empty cart
Item		Unit price	Qty	Total
🗑 Microsoft Windows Server Standard Edition - license & software assurance Insight Part #: P73-04837-MSPLA Mfr Part #: P73-04837		USD $14.70	74 non-shippable item	USD $1,087.80
🗑 Microsoft Windows Remote Desktop Services - license & software assurance - 1 subscriber (SAL) Insight Part #: 6WC-00002-MSPLA Mfr Part #: 6WC-00002		USD $4.19	23 non-shippable item	USD $96.37

Summary

Subtotal	USD $1,184.17
*Shipping estimate	USD $0.00
Tax estimate	USD $0.00
Total	USD **$1,184.17**

Proceed to checkout

*Shipping rates are calculated based on your default information. Other shipping rate options can be viewed and selected on the next page.

Save for later

Save as quote
Save cart contents
Save order template

Quick shop

Add items to your cart quickly. Separate part numbers by comma.

[   ] [1] **Add**

Validating and Entering Additional Required Information

Once you click **Proceed to checkout**, you are taken to a subsequent page to enter/verify the Country of Usage and the Contact Information. This information is required by the Manufacturer/Publisher. When complete click **Save & Continue**. Once on the Shipping/Billing page enter the required information and click **Review Order** and then **Place Order.**

If Country of Usage is the same for the order, click on "Copy to All Items in Cart" and the selected country of usage is added to all lines.

Screen 1

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Account -

Order and item information

Return to cart 🛒

1 Order and item information   2 Shipping/Billing   3 Place order

Continue shopping ▾

Additional information is needed. Fields denoted with * are required to process your order.

Report usage for: July 2017   Enrollment #: 987654321

Additional information

Budget Code* (format: XXXXA)

Dept Code
Select ▾

End User*

Project #

Requestor Name*

Continue

Line level information

Summary

Subtotal	USD $1,184.17
Shipping estimate	—
Tax estimate	—
Total	USD $1,184.17

Save for later

Save as quote
Save cart contents
Save order template

Screen 2

🇺🇸 United States | 1-800-INSIGHT   Favorite Links ▾ | Logout "Service Provider Demo | Cart $1,184.17▾

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Account -

Order and item information

Return to cart 🛒

1 Order and item information ———— 2 Shipping/Billing ———— 3 Place order

Continue shopping ▾

Additional information is needed. Fields denoted with * are required to process your order.

Report usage for: July 2017   Enrollment #: 987654321

Additional information   Edit

Budget Code* (format: XXXXA)	Dept Code	End User*
XXXXA		TEST USER
Project #	Requestor Name*	
	TEST USER	

Line level information   2 items require information

Item	Unit price	Qty	Total
Microsoft Windows Server Standard Edition - license & software assurance Insight Part #: P73-04837-MSPLA Mfr Part # P73-04837	USD $14.70	74 non-shippable item	USD $1,087.80

Line level information (required)   ⤢ Split into individual lines

License information   Clear | Copy to all

Country of usage*	Customer quote #	Authorization
Canada ▾		

Contact email*	Contact name*	Contact phone*
demospla@mailinator.com	Service Provider Demo	222-333-4444

Deal reg ID	License #*	PCN #
	987654321	

Summary

Subtotal	USD $1,184.17
Shipping estimate	—
Tax estimate	—
Total	USD $1,184.17

Save for later

Save as quote
Save cart contents
Save order template

Tips and Tricks for Repeat Reporting

Once you report your first usage you can leverage the previous months report as a starting point for the following month. This makes reporting very easy and streamlined. The easiest way to perform repeat ordering is to start on the **My Software License Agreements** page, and use the Report Usage feature. From here you can select **Retrieve Last Usage Report** or **Report Zero Usage.** Both of these options will load the appropriate parts into your cart for easy updating.

New Enhancement – Duplicate Order

- Once logged in, click account tools (left) then expand Orders using the + sign
- Click Order tracking/history
- Click Advanced Search
- You will find an option to change to past date(s) and then click the search button
- Select the order you want duplicated
- The order is added to the cart for updates as needed
- Place order

Select order from list and click duplicate order at top right side of screen.

Order Details

Order Details **Shipping Details**
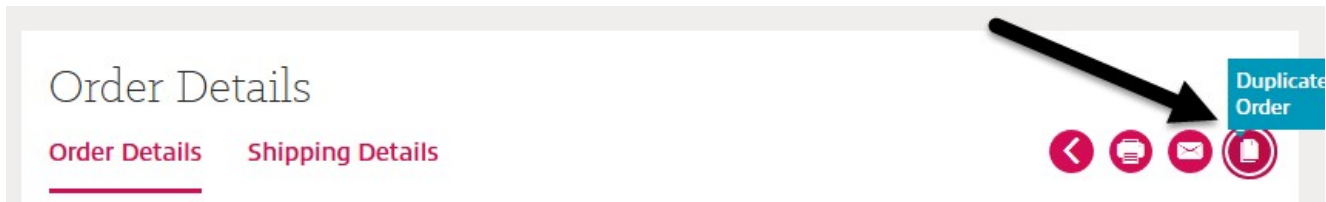
From the cart, modify quantities as necessary and check out to complete order.

SPLA Quick Check

Reporting

- o **For customers signing a New SPLA agreement -** You must report usage for the month in which your SPLA agreement is active (ex. If your agreement is activated in January you would need to begin reporting usage (each Subscriber Access License, Processor or Core License assigned) for January no later than February 10th. February's report will not be due until no later than March 10th).
- o **For ALL customers** - All usage must be reported including Zero Usage for the month. This means if you do not have any activity for a given month, you must report zero usage (you must submit a report each month regardless).

Volume License Key Codes

- o Key codes are specifically assigned to your enrollment and listed in your agreement details e-mail.

- o This Microsoft link shows what products require key codes **http://www.microsoft.com/en-us/Licensing/existing-customer/product-activation.aspx**

SPLA Media Download Guide

- o Product downloads are available through Microsoft's Volume Licensing Service Center (VLSC)

- o SPLA Partners have the ability to download products via Microsoft Volume Licensing Service Center (VLSC).

- o All SPLA partners will still need to contact the product Activation Call Center to obtain their VL keys (888-352-7140)

Cloud and Hosting Services

- o Additional Microsoft resource site providing SPLA Information Overview
- o Program Benefits
- o Resources
- o How to get started

http://www.microsoft.com/en-us/cloudandhosting

Need Help?

We appreciate your business. If you have any questions or require additional information, please contact your Insight Account Executive or the Insight SPLA Team at SPLATeamUS@insight.com for assistance.