

# Microsoft Enterprise Agreement

Program Guide

**Microsoft** | Volume Licensing



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## Enterprise Agreement Introduction

The Enterprise Agreement offers simplicity in today's complex business software environment. Designed for businesses that implement enterprise-wide standards to enhance business productivity, the Enterprise Agreement provides a framework for making software license acquisitions and management easier for businesses with as few as 250 desktop PCs. If you would like more information regarding Volume Licensing offerings designed for a government organization or academic institution, please visit: [www.microsoft.com/licensing](http://www.microsoft.com/licensing)

## Enterprise Agreement Benefits

### Minimize Cost, Maximize Value

The Enterprise Agreement helps you reduce the cost of IT computing and get the most out of your software investments through benefits, including:

- The right tools and resources that can help your IT staff and employees be more productive.
- Upgrade rights to the latest technology through Software Assurance.
- The ability to standardize your IT choices across the enterprise, so you can tap into the latest technology at a substantial savings.
- Spread payments during a three-year term helps to streamline your budgeting process, giving you the flexibility you need to improve your bottom line. You can also license additional software product licensing as needed at the original order price covered under your agreement terms.
- Software Assurance benefits that offer a broad range of tools, services, and solutions to help you get the most out of your software investments.

### More Value by Design

Reduce the time spent managing your software licenses. With the Enterprise Agreement, you can do the following:

- Eliminate the need to count individual licenses; you just count the number of desktop PCs, making it easier to manage and track licenses.
- Streamline the procurement process; you only need to place one order annually.
- Make administration and budgeting processes easier by centrally tracking purchases and managing licenses with online management tools.
- Centralize your purchasing so that you can share software products and extended benefits with qualified affiliates.

### A Program that Keeps Pace with Your Business

With the Enterprise Agreement, you can be confident that your IT infrastructure can adapt and grow with your evolving business needs through benefits such as the following:

- Access to the latest technology—Microsoft® Office Professional Plus 2007, Microsoft Office Enterprise 2007, the Windows Vista™ Enterprise Edition, Core Client Access License (CAL) Suite, and Enterprise CAL Suite.

- The software, tools, and resources you need to build and maintain a responsive and flexible IT infrastructure.
- The opportunity to evaluate any software product for 60 days before you commit.
- The ability to license additional software products under the terms of your original agreement to help you respond rapidly to changing business needs while keeping costs predictable.
- Software Assurance facilitates simple migration of software products, such as Office Professional Plus 2007 to Office Enterprise 2007 by providing access to a Step Up License. This allows for the upgrade of the License & Software Assurance portion to the higher edition, eliminating the need to license two separate software editions to benefit from the upgrade edition. For more details on how you can maximize your investment with Software Assurance benefits, go to <http://www.microsoft.com/licensing/programs/sa/default.aspx>

## Enterprise Agreement Overview

If your business has a minimum of 250 desktops and you want to license 100 percent of your qualified desktops for a three-year period, you can initiate an Enterprise Agreement. The Enterprise Agreement offers:

- Software Assurance; a powerful combination of benefits that include new version rights, the Home Use Program, and many other advantages, including support, tools, and training. Your company can gain the flexibility it needs to help keep your business edge.
- Volume pricing and the rights to the latest Microsoft enterprise software products, including Microsoft Office Professional Plus 2007, Microsoft Office Enterprise 2007, the Windows Vista Enterprise Edition, Microsoft Core Client Access License, and Microsoft Enterprise Client Access License.
- Additional products with a broad selection of Microsoft business software products. Examples of products offered as additional products include Microsoft Office Visio® 2007 drawing and diagramming software, Microsoft Office Project, Windows® servers, and Exchange servers.
- A predictable, annual price per desktop for enterprise products based on the initial number of desktops enrolled.
- An annual True Up so that businesses can run software on desktops as they are acquired, then pay a predetermined price for the software licenses annually for the remaining term of the enrollment.
- Equal, annual payments for a three-year enrollment term, with a renewal option of one year or three years.
- Step Ups allow you to migrate your software license, giving you the flexibility to upgrade software as your company needs increase over time.

## Enterprise Agreement Program Features

### Enterprise Products

The Enterprise Agreement offers businesses access to the most recent releases of the Desktop Professional Platform products. The Enterprise Agreement Desktop Platform products are:

- Microsoft Windows Vista Enterprise Edition
- Microsoft Office Professional Plus 2007 and/or Microsoft Office Enterprise 2007
- Microsoft Core Client Access License Suite or Enterprise Client Access License Suite

### Why consider enrolling in the full desktop platforms?

Businesses benefit from building both simplicity and flexibility into their information technology infrastructure. For many companies, the first step toward achieving this is to adopt the Microsoft platform as the core of its software infrastructure.

The Professional and Enterprise Platforms offer products that are integrated and optimized. Microsoft software products are optimized to work seamlessly together. For example, a common programming model is used to improve information sharing between applications.

The full platform leverages a consistent interface for users, developers, and administrators that help improve productivity and reduce costs. Common commands, menus, windows, and interchangeable models should improve training and development. In addition, strong vendor and developer support offered by both Microsoft and our partners for business applications will help increase business flexibility.

New customers who enroll in the Professional or Enterprise Platform (the Windows Vista Enterprise Edition operating system upgrade, Office Professional Plus 2007 and/or Office Enterprise 2007, and Core CAL Suite or Enterprise CAL Suite) receive a 15 percent platform discount on top of their already discounted enterprise software product.

### Additional Products

A broad selection of software titles are available as additional products. They provide the same License & Software Assurance coverage as enterprise products, but do not require an enterprise-wide commitment. For products licensed at signing, payments can be spread throughout three years in the same way that enterprise product payments are annualized. Spreading the cost of software licenses throughout three years can help businesses to refocus critical IT budget and provide a predictable framework for budgeting purposes. Also, additional products at signing will have corresponding pricing for the use of the True Up ordering process, consolidating ordering annually.

Examples of software products available as additional products include Office Visio, Microsoft Project, and Windows servers and Exchange servers. A complete list of additional products is available on the Microsoft Product List at <http://www.microsoftvolumelicensing.com/userights/PL.aspx>

To learn more about Product Use Rights, visit <http://www.microsoftvolumelicensing.com/userights/PUR.aspx>

## Software Assurance Benefits

The Enterprise Agreement includes Software Assurance, Microsoft’s enhanced maintenance program that helps you get the most out of your software investments. Access to valuable benefits such as training, deployment planning, software upgrades, and product support can help you increase the productivity of your entire organization.

Here are details on Software Assurance benefits throughout each phase of software management.

Stage	Benefit	Description
Planning Stage	New Version Rights	With Software Assurance, you receive new versions of licensed software released during the term of your agreement to deploy at your own pace as they become available. You can reduce the costs associated with acquiring new version releases and immediately take advantage of the latest technology.
	Spread Payments	You can make payments annually, instead of making one up-front payment. This helps you to reduce initial costs and forecast annual software budget requirements up to three years in advance.
Deployment Stage	Packaged Services: Information Work Solution Services	These one- to three-day partner-managed workshops help IT teams learn how desktop applications assist support deployment, security, and infrastructure business goals like project prioritization. You also learn how to implement high-value projects in the IT environment to maintain or accelerate productivity. Workshops include Information Work Business Value Discovery and Information Work Architectural Design Session.
	Microsoft Windows Preinstallation Environment (WinPE)	This is a tool based on the Windows Server® 2003 operating system and the Windows XP Professional operating system that allows IT staff to build custom solutions that speed up deployment through automation, so they spend less time and effort keeping desktops updated. WinPE can run Windows setup, scripts, and imaging applications.
Using Stage	Training Vouchers	You will receive training vouchers for training on select courses from Microsoft Certified Partners for Learning Solutions (CPLS), the premier authorized training channel for delivering learning products and services on Microsoft technology. Taking training from Microsoft CPLSs helps you prepare for deployment, enable smoother migration, and stay up-to-date with the latest Microsoft technologies, giving you the competitive advantage you need.
	eLearning Courses	Microsoft’s eLearning provides your employees access to individual, on-demand Microsoft software courses. eLearning can be delivered online or offline and includes simulations, hands-on exercises, and learning assessments.
	Home Use Program	The Home Use Program increases employee productivity and maximizes the value of your Microsoft Office investment because with it, your employees can use Office desktop programs for work or personal needs.
	Microsoft Windows Vista Enterprise Edition	The Windows Vista Enterprise Edition is optimized for large organizations and includes features such as data protection that safeguard lost or stolen PCs, application compatibility, and the ability to deploy a single image in multiple locations around the world (per availability of Windows Vista), helping you to lower your deployment and management costs.

	Microsoft Virtual PC Express	Migrate legacy applications during an operating system upgrade in a safe, protected way. Microsoft Virtual PC Express supports a single instance of a virtual operating system (in comparison, Virtual PC 2004 supports multiple instances). Virtual PC Express will be made available to our Software Assurance customers in early 2006, ahead of the Windows Vista Enterprise Edition.
	Microsoft Employee Purchase Program	The Microsoft Employee Purchase Program gives your employees significant discounts off the retail pricing of Microsoft's most popular productivity and consumer products. Using the same software at home and at work provides employees flexibility, and great consumer products offer fun and excitement. This program is a valuable addition to your organization's work/life initiatives. Employees can order discounted products directly through a password-protected Microsoft-hosted e-commerce site.
<b>Maintenance Stage</b>	24 X 7 Problem Resolution Support	With Software Assurance, you can be continuously connected with Microsoft for your support needs. You can select the right level of help when you need it with business-critical 24 hours a day, 7 days a week phone support for all Microsoft server products, Windows, and the 2007 Microsoft Office system, in addition to unlimited Web support.
	Unlimited Web Support	Complement your business-critical 24 hours a day, 7 days a week phone support with unlimited Web support during business hours, and decide which level of support is best for the issue. This helps you lower your total cost of support and ownership through time and gives you a choice for how to use your direct connection to Microsoft.
	TechNet Plus Subscription with Two Support Calls/Year	IT professionals have access to TechNet Plus subscription media, featuring resources such as the Microsoft Knowledge Base, software updates, utilities, technical training, and how-to articles to help them succeed. They also have access to additional premium TechNet Plus benefits, including evaluation software without time limits, pre-release versions of Microsoft products, two technical support incidents per year, and TechNet Plus Subscriber Online Services. IT professionals can also access TechNet Managed Newsgroups with more than 100 IT-related newsgroups, where they can post technical questions and are guaranteed responses by the next business day.
	"Cold" Backups for Disaster Recovery	Customers with Software Assurance for Microsoft server software, as well as related Client Access Licenses, are eligible for complimentary "cold backup" server licenses for disaster recovery.
	Corporate Error Reporting	Corporate Error Reporting (CER) gives you a clear and easy way to monitor and review error information so you can control deployment of fixes and resolutions. It provides the ability for applications and the operating system to collect and report on crashes in the system.
<b>Transition</b>	Extended Life-cycle Hotfix Support	Enter into Extended Hotfix Support Account (EHSA) as hotfix issues arise. Annual fees and required sign-up periods associated with EHSA are waived for Software Assurance customers, increasing peace of mind and reducing support costs. A Premier or Essential Support agreement is a pre-requisite for eligibility.

For more information about Software Assurance benefits, please visit:  
<http://www.microsoft.com/licensing/programs/sa>

## Software Assurance Renewal

To ensure the continued benefits provided by Software Assurance, all Software Assurance covered products must be renewed within 30 days of an Enterprise Agreement enrollment expiration. If transitioning from a pre-6.0 Enterprise Agreement enrollment, see the Product List for timeframes to enroll those products covered under that Enterprise enrollment.

To learn more about the Product List and Product Use Rights, visit:

### Product List

<http://www.microsoftvolumelicensing.com/userights/PL.aspx>

### Product Use Rights

<http://www.microsoftvolumelicensing.com/userights/PUR.aspx>

To learn more about Software Assurance, visit <http://www.microsoft.com/licensing/programs/sa/>.

## Agreement Term

Each Enterprise Agreement enrollment term has a three-year term providing you with a defined amount of time that the terms and prices of your purchasing relationship with Microsoft will remain consistent for all products covered in the initial order. This gives you the ability to plan and budget for software license purchases up to three years in advance, reducing annual budget restrictions and easing fiscal year spending challenges. Each enrollment has the option for either a one- or three-year renewal term.

## Annual Price per Desktop

The annual price per desktop feature of the Enterprise Agreement provides a predictable budgeting framework that you can use to forecast desktop technology costs up to three years in advance. A payment (based on the pre-established price per desktop and initial order), is due each year at the anniversary date of your Enterprise Agreement enrollment. Because you pay for your software licenses once annually, the costs normally associated with software license acquisition are reduced. In most cases, the number of software license purchase orders made annually is reduced from hundreds to two or three total. The predetermined price paid for software licenses covered in your initial order protects you from unanticipated price increases, making it easier to stay within your software budget.

## True Up

During the time you are enrolled in the Enterprise Agreement enrollment, it is likely that your business will grow and you will add desktop PCs. When you add desktop PCs, they immediately get the same license coverage as the desktop PCs enrolled at the beginning of the agreement term. You just report added desktop PCs through an annual process, called a “True Up” order. True Up orders consolidate orders for additional software licenses run during the year under one order annually (including the third year before any renewal). Customers have the additional option of truing-up multiple times throughout the year as an added benefit in managing costs. This feature is in addition to the annual True Up required each year.

The annual True Up feature helps reduce time and expense by consolidating the report of multiple additional software use under one purchase order.



If there are no desktop PCs added during the year, an update statement is reported to alert Microsoft not to expect a True Up order.

## Step Up

With an Enterprise Agreement, it is possible to migrate from Standard Edition software products to Professional or Enterprise Edition software products while maintaining Software Assurance coverage on a given product. The Step-up License is available to make it easier to upgrade from a Standard to Enterprise Edition without incurring the full cost of licensing two separate editions of software products.

### Qualification to Obtain the Step-up License

To obtain the Enterprise Edition Step-up License for server software, Microsoft Project, and Microsoft Office Visio, you will need an Enterprise Agreement that includes a Standard Edition License for the software.

### Step-up License Pricing

The Step-up License price is the difference between the License and Software Assurance price of the Enterprise Edition software products and the Standard Edition software products. For a new Enterprise Enrollment, the step-up price is spread out in equal annual billings for the duration of the customer's enrollment term. For Enterprise Enrollment customers who step up part way through the enrollment term, the billing is paid at the time the step-up is acquired.

### Additional Value-Adds

Take advantage of these additional features in the Enterprise Agreement to help boost the value received by participating in the program:

Commitment on Use Rights provide Enterprise Agreement customers the security of knowing exactly what the use rights are for the products they license under their Enterprise Agreement enrollment. Microsoft agrees not to change Product Use Rights for any version of a product after it becomes available. Furthermore, we make a commitment that we will not change use rights for enterprise products during the term of an enrollment to be more restrictive or to the customers' detriment (this commitment does not relate to new features and functionality).

Training and Evaluation Licenses helps your budget for software training and evaluation purposes go farther by offering a limited number of complimentary training and evaluation copies of any product.

- 20 copies per software title for use in a dedicated training facility, and
- 10 copies per software title for a 60-day evaluation

Downgrade Rights provide businesses with version standardization considerations and the flexibility necessary to purchase a license for the latest software version available, but run a previous version.

Re-Imaging Rights allow the use of certain software media for re-imaging to provide added convenience during product rollouts.

Secondary Use Rights allow employees to be more productive by sharing the same application license for any additional software product on a work PC as well as a portable PC for work-related purposes only.

**NOTE:** For full details, please reference the Enterprise Agreement at [www.microsoft.com/licensing](http://www.microsoft.com/licensing).

## Agreement Structure

The laborious process of negotiating terms and conditions common to multiple agreements is streamlined through Microsoft's Volume Licensing agreement structure.

A perpetual Microsoft Business and Services Agreement (MBSA) define general terms and conditions common to the Enterprise Agreement and Microsoft Services. A separate license or agreement services work order is signed to cover the specific terms of the Enterprise Agreement or Services programs. This structure allows for flexible contract maintenance in the renewing of contracts and licensing Microsoft software products. A key benefit to this structure is that the contract terms common to Microsoft licensing, service, and support agreements are signed once.

Microsoft Business and Services Agreement is a perpetual agreement between the customer and Microsoft. It contains high-level terms and conditions that are applicable to all agreements signed under it. Terms and conditions such as use and ownership, confidentiality, warranties, and others can be found in the MBSA. It must be signed either with or prior to the Enterprise Agreement.

The Enterprise Agreement defines the terms for enterprise and additional product license acquisitions, subsequent orders, True Ups, and perpetual rights.

The Enterprise Agreement enrollment establishes the basic information that your business can use to buy product licenses under the Enterprise Agreement. It defines purchase details like the term of the licensing arrangement, products, subsidiaries, language options, and Enterprise Software Advisor (or Large Account Reseller, where applicable).

An Enterprise Agreement cannot be initiated without an MBSA, and an Enterprise Agreement enrollment cannot be initiated without an Enterprise Agreement.

## Price Levels

The total quantity of initial qualified desktop PCs determines the price level of enterprise products.

## Qualified Desktops and Qualified Users

The total quantity of qualified desktop PCs when you enroll in the Enterprise Agreement determines the price level of enterprise products and any additional products under the corresponding product pool. As part of your enrollment, you are responsible for reporting the number of qualified desktops in your enterprise. This number is the quantity you indicate on the

initial order at signing, along with any additional desktop PCs added throughout the term of your enrollment, which would be covered by submitting the annual True Up order. (For an explanation of True Up, see the preceding section.)

Qualified desktop PCs are the personal desktop computers, portable computers, workstations, and similar devices that are used by or for the benefit of an enrolled affiliate (including affiliates in the enterprise) and meet the minimum requirements for running any of the enterprise products included in your agreement.

The user count may be different than the quantity of the desktop PC, but the price level is determined by the desktop PC count. For example, a customer may have 500 desktop PCs and 400 users. The price level would be A for both, but the product order would indicate 500 for the windows or office product, and 400 users for the user CAL purchases.

Customers who sign an Enterprise Agreement enrollment are referred to as an “enrolled affiliate.” An enrollment is a standard option giving global companies greater flexibility in defining their enterprise. Each enterprise must consist of entire legal entities, not partial entities such as departments, divisions, or business units. Each affiliate must be entirely “in” or entirely “out.”

Qualified desktop PCs do not include any computers dedicated to run only line-of-business software or any system running an embedded operating system (e.g., Windows 9.x embedded or Windows XP embedded).

There are four price levels for each of the enterprise products (both desktop & user based pricing).

Level	Desktop PC's
A	250-2,399
B	2,400-5,999
C	6,000-14,999
D	15,000+

If you are renewing your Enterprise Agreement then you may sign a renewal Enterprise Agreement for only the Software Assurance portion of their licenses.

## Placing an Enterprise Agreement Order

Contact Microsoft to find a Microsoft Authorized Enterprise Software Advisor (ESA) or a Microsoft Authorized Large Account Reseller (LAR) to assist you with acquiring licenses under the Enterprise Agreement. For the Microsoft ESA or LAR nearest you, please refer to: <http://www.microsoft.com/products/info/render.aspx?view=22&type=mdp&content=22/licensing>

## Product Fulfillment

Customized according to the languages and products selected on the Enterprise Agreement enrollment, the Welcome Kit and subsequent Update Kits offer convenience and access to a broad range of business software titles. The Welcome Kits and Update Kits are automatically provided to the contacts specified on each Enterprise Agreement enrollment. Additional media kits may be ordered from your reseller for an additional charge. Download capability is also available.

## Ordering Media and Documentation

Use the Media Kit User's Guide Web site to manage the Media kit. Access these site features via the link on: <http://licensing.microsoft.com/>

## Groupings and Color Codes

Product pools (applications, systems, and servers) are divided into seven groupings and are color coded to make them easier to organize. The following chart shows the groups and colors.

Pool	Group	Color Code	Examples
Applications	Microsoft Office Family	Blue	Microsoft Office suites and individual applications such as Microsoft Project, Microsoft Visio® drawing and diagramming software, etc.
	Developer Tools	Gold	Microsoft Visual Studio® development system, SQL Server™ Developer Edition, Office Developer, etc.
	Training and Learning	Purple	Microsoft Press® titles (Step by Step, Mastering, etc.), Microsoft Encarta® multimedia encyclopedia, etc.
	Products for Macintosh	Olive	Microsoft Office suites and individual applications for Macintosh
Systems	Windows Client: Business	Green	Windows NT® Workstation, Windows® 2000 Professional, Windows® XP Professional
Servers	Server Applications	Red	SNA Server, Proxy Server, Site Server, Office Live Server, SharePoint® Portal Server, SQL Server, etc.
	Windows Servers	Aqua	Windows 2000 Servers, Windows NT Servers, and Microsoft Exchange Server

## Microsoft Volume Licensing Services Tracking Tool

Online tracking through Microsoft Volume Licensing Services (MVLS) makes managing your licenses easier. MVLS license management tool is a password-protected Web site that lets you view your license agreements and status, online records, and other license information and Software Assurance benefits. You can access the MVLS site at: <http://licensing.microsoft.com>

## Agreement Renewal

The initial term of the Enterprise Agreement enrollment is three years. At the end of the third year, the Enterprise Agreement enrollment may be renewed one time for one or three years. Renewal pricing for existing desktops is based on Software Assurance only. Contact your Enterprise Software Advisor or Large Account Reseller for additional information.

## Additional Resources

Microsoft offers a variety of information about the Enterprise Agreement and other Volume Licensing programs on the Microsoft Volume Licensing Web site at <http://www.microsoft.com/licensing>

## Glossary

### **Affiliate**

A company or legal entity that owns and controls, is owned and controlled by, or is under common ownership and control with, the customer signing an MBSA.

**Effective Date** The agreement or enrollment start date.

### **Enterprise Agreement (EA)**

Enterprise Agreement refers to Microsoft's Volume Licensing offering that gives customers that want to license one or more of Microsoft's platform products across their enterprise the means to ensure that their entire enterprise will be licensed.

### **Enterprise Software Advisor (ESA)**

An entity authorized by Microsoft and engaged by an enrolled affiliate to provide Enterprise Agreement pre and post-sales assistance.

### **Enrollment**

A Microsoft document that allows qualifying affiliates to sign up for enterprise enrollment under an existing Enterprise Agreement and acquire licenses for Microsoft products.

### **License**

Any one of those offerings identified in the Product List located at <http://www.microsoftvolumelicensing.com/userights/PL.aspx> (including standard licenses and upgrades for desktop operating systems) that provides the right to run the version of the product for which it is ordered.

### **License & Software Assurance**

Combines the License and Software Assurance under a single stock-keeping unit (SKU).

### **Microsoft**

The contracting Microsoft affiliate under a Microsoft Business and Services Agreement, Enterprise Agreement, or enrollments and its affiliates.

### **Pools**

Microsoft products available through volume licensing programs are categorized as applications, systems, or servers products. Prices are established according to the volume levels acquired in each category or "pool," also referred to as the applications pool, systems pool, and servers pool.

### **Product List**

A document that identifies the Microsoft products that are available or may be available under the volume licensing programs and any product-specific conditions or limitations on the acquisition of licenses for those products.

### **Renewal Period**

The one- or three-year period after the expiration of the original term of the Enterprise Agreement enrollment.

## **Software Assurance**

Provides the right to run the latest version of licensed product and the ability to spread payments annually. Also includes tools, support, training, and other benefits.

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