

Microsoft Open License

Program Guide

Microsoft | Volume Licensing



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Understanding Your Licensing Options

There are several ways to acquire Microsoft® software licenses, depending on your business needs and the number of licenses required. Microsoft Volume Licensing programs, such as Open License, may be the right choice for your organization if you need multiple copies of Microsoft software products and want to take advantage of the additional benefits offered.

Typically, customers acquire Microsoft software in one of three ways:

1. **Full Packaged Product (FPP)**—Licenses for boxed, shrink-wrapped software that are purchased through retail outlets in small quantities.
2. **Original Equipment Manufacturer (OEM) or System Builder**—Computer manufacturers can preinstall Microsoft software and provide legal licenses.
3. **Volume Licensing**—If you are getting more than five copies of Microsoft software, volume licensing can provide potential savings, flexible license acquisition, ease of deployment, and payment options. Microsoft Open Business and Open Value are the Volume Licensing programs for small and midsize organizations.

Microsoft Open License Overview

The Microsoft Open License program was designed for corporate, academic, charity, and government organizations that want to make a minimum initial purchase of five software licenses. The Open License program gives small and midsize businesses a convenient and simple way to acquire the latest Microsoft technology.

Volume discounts for minimal up-front purchases are available through a broad worldwide reseller channel. Acquiring additional software products through Open License may be made in any quantity, at any time during a two-year period, giving you the flexibility to deploy what you want when you want it.

Managing software licenses is made easy through our online services, such as eOpen and Microsoft Volume Licensing Services (MVLS). These online tools offer an easy, online way for you to electronically manage your license orders, purchase history, track compliance, and receive order confirmation. eOpen is available for Open Business and Open Volume while MVLS is offered with Open Value. Managing your licenses through online services helps you to reduce the time you spend tracking paper copies of software licenses, simplifying license management.

Benefits

The Open License program offers many benefits, including:

- **Licensing Simplicity.** Place an order and start using software immediately through a flexible pay as you go model, helping to eliminate the need for forecasting. Once an order is placed, a single authorization identification number is issued that can be reused and shared with qualified affiliates for the duration of the two-year agreement helping to reduce procurement costs and simplify the purchasing process.

- **Licensing Affordability.** Stretch software procurement budgets farther in comparison to retail purchase options. With a simple one-time transaction, you can pay for what you need when you need it, giving you the flexibility to manage your software needs.
- **Licensing Flexibility.** Easy access to the latest Microsoft technology is made available through a broad worldwide reseller channel helping ensure that you have convenient and fast access to thousands of business software titles.
- **Licensing Value.** Manage licenses easily and conveniently through online tracking tools. With the online tool eOpen, you can electronically manage your license orders, review purchase history, download volume license keys for software product installation, track compliance, and receive order confirmation information.

The Open License Program Family

Microsoft Open License recognizes that small and medium organizations have a variety of acquisition needs. Open Value, Open Business, and Open Volume share many of the same program features, but give you different purchasing options, helping to ensure the right fit for your business needs.

Open Value

Open Value is the recommended program if you are a small to midsize organization with five or more desktop PCs and want simplified license management, better management of software costs, and better control over your investment. Open Value offers the advantages of Software Assurance, Microsoft's enhanced maintenance program that helps you get the most out of your software investments through each phase of software management. Access to valuable benefits such as training, deployment planning, software upgrades, and product support help you increase the productivity of your entire organization.

Open Business

Open Business is a good choice if you have a corporate, academic, charitable, or government organization and want a minimum initial purchase of five software licenses. This program is ideal if you prefer to pay as you go ensuring maximum flexibility to grow with an organization's increasing and changing business needs.

Open Volume

If you are a small- or medium-sized business that wants to boost your up-front purchase to receive a deeper savings for your organization, then Open Volume is the right choice for you. Open Volume uses product pools and points to establish the entry minimum for discount price levels. Similar to Open Business, an Authorization number is issued the first time you place an order and is used when placing future orders under a two-year price level.

Open Volume incorporates product pools and points to determine Open Volume eligibility. Software products are grouped into three separate product pools; applications pool, systems pool, and server pool. Product pools group similar Microsoft software products to achieve deeper volume pricing discounts. The applications pool includes products such as Microsoft Office, Microsoft Project, Microsoft Visio® drawing and diagramming software, and the Microsoft Visual Studio® development system. The systems pool contains Microsoft Windows® operating system upgrades such as Windows XP Professional Edition. Examples of products offered

within the server pool include the Windows SQL Server® Standard Edition operating system and Microsoft Exchange Server.

Each software product carries a point value. For example, the Office Professional Edition is worth two points and Windows Server is worth 15 points. The Software Assurance component of License & Software Assurance is worth one half the total point value of its accompanying license annually. For example, if Office is worth two points, Software Assurance is worth one point for each year it is maintained during the term of the Open License agreement.

If you are purchasing larger volumes of Microsoft software licenses, Open Volume with product pools and points may be the best Open License solution for you. If you choose Open Volume, you should determine the software product mix and license quantity you plan to purchase to determine the applicable product pool and price level. If your purchases within a single product pool total more than 500 points (150 in Europe, the Middle East, and Africa), you should initiate an Open Volume order.

Reorders for Open Volume are a minimum of one point and must be made within the same product pool as the original Open License agreement. Microsoft assigns a separate authorization number for each product pool where licenses are purchased.

Other Program Benefits

Software Assurance

Software Assurance can help you get the most out of your software investment by giving you access to valuable benefits such as training, deployment planning, software upgrades, and software product support, which can help you increase the productivity of your entire organization.

If you choose to purchase Software Assurance, we recommend purchasing an Open Value Agreement and not an Open Business or Open Volume agreement. Open Value comes with Software Assurance, Microsoft’s enhanced maintenance program that helps you get the most out of your software investment.

The details on Software Assurance benefits throughout each phase of software management are described below.

Stage	Benefit	Description
Plan	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 lets you reduce initial costs and forecast annual software budget requirements up to three years in advance.

Deploy	Packaged Services: Information Work Solution Services	One- to three-day, partner-managed workshops teach IT teams how desktop applications can help support deployment, security, and infrastructure business goals such as project prioritization or 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)	A tool based on Microsoft Windows Server 2003 and Windows XP Professional that allows IT staff to build custom solutions that speed up deployment through automation. With this tool, the staff can spend less time and effort keeping desktops updated. Windows PE can run Windows setup, scripts, and imaging applications.
Use	Training Vouchers	You receive training vouchers for training on select courses from Microsoft Certified Partners for Learning Solutions (CPLSs), 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	Microsoft's eLearning gives 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 by enabling your employees to use Office desktop programs for work or personal needs.
	Windows Vista Enterprise	Lower your deployment and management costs. the Microsoft Windows Vista™ Enterprise Edition operating system 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)
	Virtual PC Express	Migrate legacy applications during an operating system upgrade in a safe, protected way. 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 calendar 2006, ahead of the Windows Vista Enterprise Edition.
	Microsoft Employee Purchase Program	The Microsoft Employee Purchase Program gives your employees significant discounts off retail pricing on 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 ecommerce site.

Maintain	24 Hours a Day, 7 Days a Week Problem Resolution Support	Software Assurance enables you to 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, Microsoft Windows, and the 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 of 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 (CALs), are eligible for complimentary "cold backup" server licenses for disaster recovery.
Transition	Extended Life-cycle Hotfix Support	Enter into the 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.

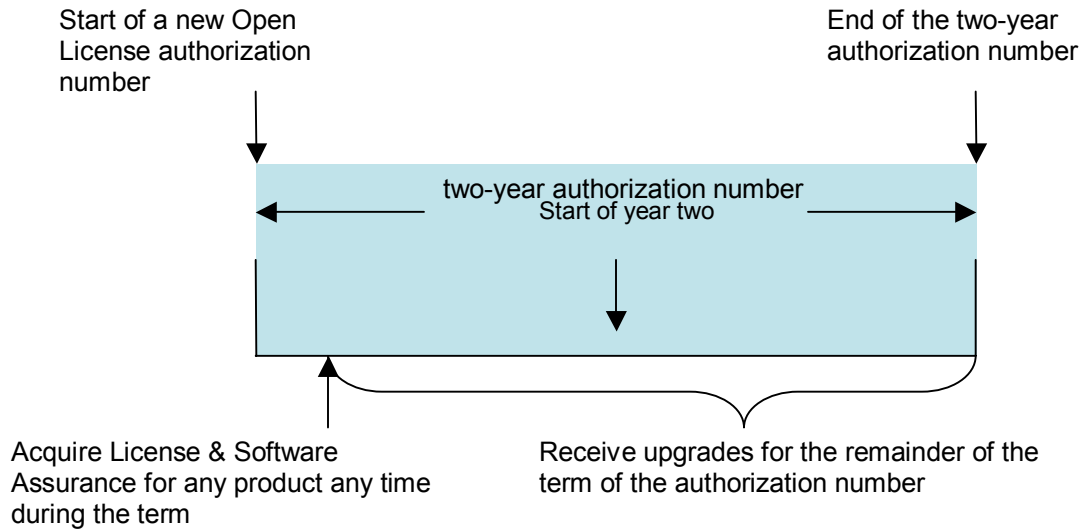
For more details, see the Software Assurance Benefits Guide at <http://www.microsoft.com/openvalue>.

Purchasing Software Assurance

You may purchase Software Assurance with the license through Licenses & Software Assurance. Software Assurance coverage runs for the term of your Open Value agreement or the remaining balance of the term of the Open License Authorization number. Software Assurance must always be paid for in two-year increments, regardless of when it was purchased. In cases where time has passed after the initiation of an Open License, it may be advantageous for you to open a new Open License to receive the most value from your Software Assurance purchase.

There is a period of 90 days from the purchase of a full packaged product license in retail or from the purchase of a license from an original equipment manufacturer to enroll that product in Software Assurance.

Additionally, Office System Licenses purchased through an OEM may be enrolled in Software Assurance within 90 days of the license purchase date. All other application product licenses purchased in retail or from an OEM may not be enrolled in Software Assurance.



Open License Program Comparison Chart

	Open Value	Open Business	Open Volume	OEM	FPP
Initial purchase	Five licenses ¹ One license for MBS products	Five licenses	500-point minimum within a specific product pool (applications, systems, and servers) on initial order; each license carries a point value	One license with a complete system	1 unit
Single agreement for multiple entities	Yes ²	No	No	Not applicable	Not applicable
Reordering	Yes, until three years after the agreement was entered into	Yes, until two years after the agreement was entered into	Yes, until two years after the agreement was entered into	Not applicable	Not applicable

¹ A license is either a license with Software Assurance or only Software Assurance. Buying Software Assurance without a license can be done when you want to renew Software Assurance that has been purchased through a previous agreement or when you want to add Software Assurance to an OEM license.

² Limited to entities in the same region.

Product portfolio	Nearly all business-oriented products	Nearly all business-oriented products	Nearly all business-oriented products	Limited ³	Nearly all business-oriented products
Software Assurance	Included	Optional	Optional	Add through Open Value or Open Business ⁴	Add through Open Value or Open Business ⁵
Downgrade rights	Yes	Yes	Yes	No, with a few exceptions	No, with a few exceptions ⁶
Subscription	Optional ⁷	No	No	No	No
Spread payments	Yes, optional ⁸	No	No	No	No
Price protection	Yes ⁹	No	No	No	No
Standardization benefits	Yes, reduced pricing, price protection, and additional Software Assurance benefits	No		No	No
Install before you order	Yes, monthly ordering	No		No	No
Web-based license management	Yes	Yes		No	No
Media includes	Yes, also for new versions	No		Yes	Recovery media included depending on hardware vendor
Product Activation	No	No		Yes	Yes ¹⁰

³ Products available through an OEM license are Microsoft Windows XP, Microsoft Windows Server, Windows Small Business Server, and several Microsoft Office products.

⁴ Software Assurance can be added to OEM licenses for up to 90 days after licenses acquisition.

⁵ Software Assurance can be added to full packaged product licenses for desktop operating systems and server products for up to 90 days after licenses acquisition.

⁶ For example, Windows XP Professional can be downgraded, but Office 2003 cannot.

⁷ Not available in North America.

⁸ Open Value Subscription only offers annual spread payments.

⁹ Price protection is provided for subsequent payments. Open Value Companywide also provides price protection for subsequent orders for companywide products. Price protection applies to list prices and not promotional prices. Open Value Subscription provides price protection for all previously ordered products.

¹⁰ In most cases, your hardware vendor will complete Product Activation for you as part of the installation procedure.

eOpen

Managing software licenses is made easy through our online services, such as eOpen. eOpen is an online tool that helps you to electronically manage your license orders, purchase history, track compliance, and receive order confirmation, giving you the flexibility to manage licenses more effectively. eOpen offers benefits that include:

- Online access to license agreement and Product Use Rights
- Easy access to transaction history, including acquisitions, reorders, and returns
- Access to Volume License Product Keys to install your software products
- Online updates of license contact information
- Reduction of administrative costs associated with manually tracking license certificates and software compliance

When Microsoft processes an Open License order, the authorization number and license number are created and posted to eOpen within 24 hours reflecting the updated license status. Once you have placed an order, access to the following information will be available, including:

- Authorization number
- License number
- Name and address of purchaser
- Date of initial order
- Expiration of authorization number (last day to reorder)
- Products and quantity ordered

Microsoft Volume Licensing Services (MVLS) Tracking Tool

With Open Value, you can easily and conveniently track and manage your licenses online through Microsoft Volume Licensing Services (MVLS). 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>

Placing an Order

If you are interested in volume pricing through the Microsoft Open License program, locate a reseller near you. To find a Microsoft reseller near you, call (800) 426-9400 in the United States or (877) 568-2495 in Canada. Outside the United States or Canada, please contact your local Microsoft subsidiary. See Microsoft licensing sites worldwide.

You can review the Open License terms and conditions and pricing and payment terms with the reseller during the sales process. After an Open License is initiated, Microsoft validates and processes your order, creating a unique authorization number that authenticates an initial license order.

Microsoft provides electronic delivery of Open Licenses in most countries. This is done through the eOpen Web site located at <https://eopen.microsoft.com>, where information pertaining to the Open License can be viewed online. An Open License Authorization number and a license number corresponding to that authorization number are required to access this secure Web site.

Making Copies

Following the initiation of the Open License, the exact number of copies of product licensed through the Open License program may be run. Use legally acquired media kits to install licensed software across multiple workstations or servers, which may reduce the volume of media per desktop maintained as a result of retail software license purchases.

Additional Resources

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

Appendix A

What Is a Software License?

Acquiring software licenses through Volume Licensing is different than acquiring retail boxed software licenses. A retail software license is usually sold in a box and contains media (floppy disk, CD-ROM, or DVD format), a user's guide, access to product support, and Microsoft Software License Terms, formerly known as the End User License Agreement or EULA. The Software License Terms dictate how the software may and may not be used.

Software acquired through volume licensing is a software license only. A software license provides the right to run a Microsoft software product. A license acquired through Volume Licensing does not include an individual disk, CD-ROM, DVD, user's guide, or product support.

Savings above retail boxed software prices can be realized by participating in Microsoft's volume licensing programs. By acquiring software licenses through Volume Licensing, customers only pay for the software license and have the option to acquire media (or supplemental media in the case of Open Value), documentation, and product support separately as needed at less cost.

There are three basic steps required to acquire a software license:

1. Determine the licenses needed.
2. Decide the best purchase option.
3. Determine where to purchase.

Determining the Licenses You Need

A software product license can be broken into five main elements: product pool, product, version, edition, and product type.

Product Pool

Microsoft software programs fall under one of the following three product pools:

1. **Applications:** Examples of Microsoft applications include Office, Visio, and Project. Developer tools and utilities, such as Visual Studio are also part of the Microsoft applications pool.
2. **Systems:** Examples of Microsoft desktop operating system software programs are Microsoft Windows 2000 Professional.
3. **Servers:** Examples of Microsoft server software programs are Microsoft Exchange 2000 Server, Microsoft SQL Server™ 2000, and Windows 2000 Server.

Product

The product software is for example, Microsoft Office, Visual Studio, Windows 2000, or SQL Server.

Version

Differentiates between various releases of the product (e.g., Microsoft Office 97 and Microsoft Office 2000)

Edition

Specifies the level of features and/or applications included in a product (e.g., Microsoft Office 2000 Standard Edition includes Microsoft Word, Microsoft Excel® spreadsheet software, Microsoft Outlook® messaging and collaboration client, and PowerPoint® presentation graphics program where Office 2000 Professional includes Word, Excel, Outlook, PowerPoint, Publisher, Microsoft Small Business Tools, and Microsoft Access).

Product Type

License: Provides the right to run a specific version of the product ordered. For example, Microsoft Office XP Professional Edition.

Software Assurance

Software Assurance may be ordered for any underlying licensed product and provides the right to upgrade to, and run, the latest version of that product that Microsoft makes available during the covered period. Software Assurance is automatically included in the Open Value, Open Value Subscription, Enterprise Agreement (EA), and Enterprise Subscription Agreement (ESA) programs.

Note: Options and rules differ across products.

Deciding the Best Purchase Option and Where to Purchase**Original Equipment Manufacturer (OEM)**

You may license products through an original equipment manufacturer. These are products (e.g., Windows 2000 Professional operating system) that come installed when you purchase a new computer.

Full Packaged Product Retail

Licenses for product that come in physical, shrink-wrapped boxes can be purchased in a local retail store or any local software retailer.

Volume Licensing for Organizations

If you require multiple software licenses, you could potentially save a significant amount off the FPP price of Microsoft software licenses by purchasing your software through a Volume Licensing program such as Open License.

Glossary

Affiliates

A company or legal entity, which owns, is owned by, or is under common ownership with, the customer. Ownership is defined as more than 50 percent ownership. Qualifying affiliate means an owned affiliate located within a single region.

Agreement number

The unique number assigned to the customer by Microsoft after receiving an initial order in a Microsoft Volume Licensing program. Within Open Value, this number allows reorders for three years from the initial signing date.

Client Access License (CAL)

A license that authorizes a user to access Microsoft server products and perform certain functions such as file and print sharing or access services such as e-mail. In general, a single CAL is required for each user or device accessing a server, depending on how the server has been licensed and configured.

Core CAL

The Microsoft Core CAL, only available through volume licensing, offers a convenient way to license basic server components across desktop computers. The Microsoft Core CAL includes CALs for Microsoft Windows Server, Exchange Server, Systems Management Server (which is called a Configuration Management License or CML), and Microsoft SharePoint® Portal Server.

Company-wide option

The Company-wide option provides additional savings within Open Value for organizations that want to standardize on one or two enterprise products or all three enterprise products as a group with the Desktop Professional Platform or Small Business Desktop Platform. The minimum desktop requirement is five desktop PCs.

Customer

The company or entity signing an Open Value agreement.

Effective date

The licensing agreement start date. Typically this is the date the contracting Microsoft Affiliate accepts the agreement.

Microsoft Software License Terms

Each Microsoft software product includes Microsoft Software License Terms, formerly known as the End-User License Agreement (EULA). The Microsoft Software License Terms cover your use of the licensed product as governed by the terms of your agreement and the product use rights specific to such products.

Estimated retail price (ERP)

A common term for the suggested, estimated price a manufacturer puts on its products for sale in a retail business.

Full packaged product (FPP)

Physical, shrink-wrapped boxes, with one license per box, offered by software retailers. FPP is for those who are looking to acquire a small number of software licenses quickly. When upgrading to a new computer, you may transfer FPP licenses to new hardware no more than one time.

License

Any one of those offerings identified in the Microsoft Product List (including standard licenses, and upgrades for desktop operating systems) that provide the right to run a specific version of the software product ordered.

License & Software Assurance

Combines a License and Software Assurance within a single offering.

Media

Materials such as a floppy disk or CD-ROM disc for a licensed software product. May also include printed materials such as a user's guide or product manual.

Microsoft Volume License Services (MVLS)

Microsoft Volume License Services is a password-protected Web site that serves as a license management tool for customers. It displays a customer's license status, Software Assurance benefits entitlements, agreement numbers, online records, and other license information.

Non-companywide option

An Open Value option that allows you to pay annually for licenses and upgrade rights on some of your company's desktop PCs or servers.

Original equipment manufacturer (OEM)

OEM software licenses are acquired when you buy a computer with software legally preinstalled. If you have ever purchased a computer from the store with Microsoft Windows or Office installed, you have acquired a license for OEM or System Builder software. OEM licenses may be used only on the computer that the software was preinstalled on.

Open Business

A Microsoft Volume Licensing program for small and midsize organizations that provides discounts over the estimated retail price based on the size of the initial order. The minimum initial order is five licenses.

Subscription option

An Open Value option that allows customers to subscribe through annual payments for the use of Microsoft software, with the ability to make a final buyout payment to own the licenses.

Open Value

A Microsoft Volume Licensing program for small and midsize organizations that want the advantages of the latest software and other Software Assurance benefits, and the ability to spread payments annually.

Product list

The statement published by Microsoft from time to time that identifies the products available under a volume licensing program and any product-specific conditions or limitations on the acquisition of licenses for the product.

Product Use Rights (PUR)

Use of any product that is licensed by Microsoft is governed by Product Use Rights specific to each product and version.

Qualified desktops

Qualified desktops are personal computers and similar devices that are used for the general benefit of an enterprise. Qualified desktops do not include computers and systems dedicated to specialized purposes, such as computers designated as a server-only and systems that are exclusively for line-of-business software, such as an accounting program used by an accountant, or systems running an embedded operating system.

Reseller

An authorized entity that offers Microsoft product licenses to customers.

Software Assurance

Microsoft's enhanced maintenance program that provides the right to run the latest version of licensed product and the ability to spread payments annually. Includes additional benefits such as tools, support, and training.

Territory

The country in which the customer is located. If the customer is located in the European Union (EU) or European Free Trade Associate (EFTA), the territory is the entire EU/EFTA.

True up/true down

The process of adjusting a customer's report in volume licensing for the number of qualified desktops in an organization. With Open Value, customers can install software first and pay later. The Open Value subscription option lets customers "true up" or "true down" annually with their year-end report and make payment adjustments up or down accordingly. With Open Value companywide and non-companywide (perpetual) options, customers can true up monthly, but cannot true down.

Windows Small Business Server 2003 CAL

Similar to the Microsoft Core CAL, the Microsoft Windows Small Business Server 2003 CAL provides customers with access rights to Microsoft Windows Small Business Server 2003 servers for users or devices (or both).

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