

# The EA Renewal Guide

A Microsoft® Enterprise Agreement (EA) offers your organization a cost-effective way to acquire the latest Microsoft technology, help standardize your IT infrastructure, and simplify license management. Work with your reseller or Microsoft account team to fully assess your company's business needs to prepare for renewal. The enclosed Summary of Agreements and the information in this guide will help you get started.

If you have questions at any time, feel free to get in touch with your reseller or Microsoft account team for assistance. You will find their latest contact information listed on your Summary of Agreements. You can also visit [www.microsoft.com/ea/renew](http://www.microsoft.com/ea/renew) or call (866) 230-0560.

## The renewal process checklist.

Understand your current business environment and upcoming needs so you and your reseller or Microsoft account team can identify the best solutions to meet those needs. Consider the following types of questions for both the immediate and long term:

- What is your company's virtualization strategy? Are you properly licensed for Microsoft products in a virtualized environment?
- What Microsoft products and versions is your company currently using?
- What are your deployment plans for the next three years?
- What kind of growth has your company experienced so far, and what kind of growth are you expecting for the next three years?
- What kind of financing works best for your organization? Are budgets stable, and do you expect them to remain that way?

Obtain an accurate count of the licenses in your environment as part of your annual True-Up (see the enclosed True-Up Guide for more details):

- The number of servers in your organization
- The number of CPUs in each server
- The number of computers in your organization
- The number of qualifying underlying operating system licenses on computers within your organization

Review the enclosed Summary of Agreements to determine if your current licensing meets your immediate and future needs or if you need additional software and solutions.

Work with your reseller or Microsoft account team to complete the renewal process by incorporating the products and services you will need into a comprehensive EA.

- Your reseller or Microsoft account team can identify the Volume Licensing options that meet your organization's needs best and help you see the greatest value from your investment.

# Your Enterprise Agreement

## The benefits include:

- Volume pricing and the rights to the latest Microsoft products covered by your agreement
- Amortized payments over a three-year term, with the option to renew with Microsoft Software Assurance (SA) only
- Locked-in pricing during the EA term, making it easy to budget for growth and other changes in your environment
- A fixed, annual price per computer for Enterprise products based on the initial number of computers enrolled
- Centralized purchasing for your organization, including qualified affiliates worldwide
- IT standardization across the entire organization
- Microsoft Services Essential Support, which can help give your IT staff more time to concentrate on optimizing information technology to support your business solutions
- Software Assurance benefits, including the Windows Vista® Enterprise operating system, Training Vouchers, Packaged Services, e-learning, the Home Use Program, 24x7 phone and Web support, Extended Hotfix Support, and New Version Rights

## How it works.

### Core requirements

An EA may be a good choice for your organization if you have 250 desktops or more, and you would like to license 100 percent of those qualified desktops on at least one of the three core desktop products.

### Core EA components: the desktop platform

- Windows Vista Enterprise
- Microsoft Office Professional Plus 2007 or Microsoft Office Enterprise 2007
- Microsoft Core Client Access License (CAL) Suite or Enterprise CAL Suite

You have the choice to include all three or any combination of the three desktop platform products in our EA. When you adopt the full Microsoft desktop platform as the core of your software infrastructure, you build simplicity and flexibility into your IT infrastructure.

### Additional products

A broad selection of software products is available in addition to the three core EA components. Adding one or more of these products to your EA gives you the same license and Software Assurance coverage as the core Enterprise products, without the enterprisewide commitment. Payments can be spread over three years in the same way, and these products are also eligible for True-Up consolidated annual ordering. Examples of additional products include Microsoft Office Visio®, Microsoft Office Project, the Windows Server® operating system, and Microsoft Exchange Server.

### Enrollment period

Each EA enrollment has a three-year term, which locks in the conditions and prices of your purchasing agreement for that amount of time. Each enrollment has the option for either a one- or three-year renewal term.

### True-Up

During the term of your EA, your business is likely to grow, so you'll need more desktop computers. As part of your EA, new desktops get the same license coverage as the computers enrolled at the beginning of the agreement term—and you are required to report the additional desktops through an annual True-Up order, including the third year before renewal. The True-Up system reduces paperwork and the effort required to keep your licensing up-to-date. For more information on the True-Up process, please refer to the enclosed True-Up Guide.

### Financing options

Microsoft Financing helps you get the technology you need, when you need it. We offer financial options for software, services, and hardware, helping make IT solutions more affordable through predictable payments that are evenly spread over the life of the investment. Let us help optimize your budget and free up your corporate credit lines for other investments. There are no hefty down payments or additional fees—just smart solutions that make excellent business sense.

## Taking advantage of Software Assurance.

An EA includes Software Assurance, the comprehensive maintenance program from Microsoft. SA benefits received under an EA, such as deployment planning, IT staff and user training, and product support, can help you increase worker productivity, accelerate organizational performance, and increase the value of your software investment. As a Microsoft SA customer, you are eligible to upgrade to new versions of licensed software made available during your term of SA coverage.

### **Get the most out of your current EA.**

The SA benefits statement included in this kit summarizes the benefits included in your current EA and highlights those you have not yet activated or consumed. It's not too late to take advantage of your remaining benefits. They can save you a considerable amount on your IT budget!

**Note:** To ensure continued SA benefit coverage, all SA-covered products must be renewed within 30 days of your EA enrollment expiration.

## Stepping up.

A Step-Up license makes it possible to migrate from Standard Edition software products to the Professional or Enterprise version, while maintaining SA coverage and without incurring the full cost of licensing two separate editions. To obtain the Enterprise Edition Step-Up license for Windows Server, Office Project, or Office Visio, you must have an EA that includes the Standard Edition of the product you want to upgrade.

### **Step-Up license pricing**

The Step-Up license price is the difference between the license and SA price of the version you are stepping up to and the license and SA price of the edition you currently own. For a new EA enrollment, the Step-Up price will be divided into equal annual billings for the duration of your enrollment term. If you decide to step up part way through your term, the amount will be billed at the time you acquire the new Step-Up license.

## Adding value.

### **Training and evaluation licenses**

Make your software training and evaluation budgets go further with the training and evaluation licenses included with your EA:

- Twenty copies per software title for use in a dedicated training facility
- Ten copies per software title for a 60-day evaluation

### **Downgrade rights**

When you have version standardization considerations, downgrade rights offer the flexibility necessary to purchase a license for the latest product version available, but run a previous version.

### **Reimaging rights**

Reimage using designated software media for added convenience during product rollouts.

### **Secondary use rights**

Help employees be more productive by allowing them to share the same application license for any additional software product on two computers (for business purposes only).

## Understanding CALs

### When are CALs required?

Each computer or user accessing Microsoft server software must be granted that right through a client-side license, or CAL. For example, if you deploy Exchange Server, each user accessing e-mail on the server must have a licensed copy of Microsoft Office Outlook® and also the appropriate CAL.

### What CAL Suites does Microsoft offer?

The Microsoft CAL Suite portfolio includes the Core CAL Suite, which covers basic server functionality, and the Enterprise CAL Suite, which adds capabilities such as unified communications, Web-based forms, spreadsheet publishing, presence and instant messaging, Web conferencing, client monitoring, and security. If you currently use Windows Server or Exchange Server, you may benefit from purchasing the Core CAL Suite as a first step in standardizing your core infrastructure capabilities. If you have two or more Enterprise CAL products in your three-to-five-year IT plan, it may make sense for your company to purchase that suite.

### What is the difference between User and Device CALs?

You have the choice to license your Microsoft servers "per device" or "per user." Per-user licensing means you need a license for each user accessing the server. Per-device licensing means you need a CAL for each device accessing the server in question.

### Can I use multiplexing to reduce the number of CALs I need?

Multiplexing does not change the number of Microsoft CALs required, no matter how many multiplexing devices are between the user or device and the server. Any user or device accessing the server, files, data, or content provided by the server through an automated process requires a CAL. When information is delivered manually from one person to another, such as through e-mail or a hard-copy printout, a CAL is not required for the person receiving the information.

### Can I use a Standard CAL to access an Enterprise edition of the server?

Yes. Customers can use Standard and Enterprise CALs with either the Standard or Enterprise editions of a server. A Standard CAL provides core functionality for either edition of the server, while an Enterprise CAL offers expanded features and functionality, whatever the server edition you have purchased.

### What is the difference between "per server" and "per processor" licensing?

With per-server licensing, a specified number of User or Device CALs are associated with a particular server. The number of devices that can legally access that server simultaneously is limited in per-server licensing to the number of CALs purchased for that particular server. For example, if you license Microsoft SQL Server® in per-server licensing mode, purchasing 50 CALs for it will allow up to 50 unique devices to be connected to it simultaneously. CALs in per-server deployments are not permanently associated with a specific device, so if you add another SQL Server licensed in per-server mode, separate SQL Server CALs will be required to access it.

The per-processor licensing model eliminates the CAL requirement, and is optimized for organizations building business-to-business, business-to-consumer, and business-to-employee Web-based applications. Under this structure, you acquire a separate per-processor license for each processor on the server running the server software. A per-processor license includes access for an unlimited number of users who may connect with the server from outside the local area network, the wide area network, or the firewall. There is no need to purchase additional server licenses, CALs, or External Connector licenses.

### When do I need an External Connector license?

An External Connector license grants access to a server to an unlimited number of external users, such as business affiliates, suppliers, customers, retirees, or alumni. This license eliminates the need for individual CALs and is available for select Microsoft server products.

### Does Microsoft offer a CAL Suite that includes SQL Server?

No. Currently, you can add a SQL Server CAL to either the Core CAL Suite or the Enterprise CAL Suite. As technology and business needs evolve, we anticipate adding offerings both inside and outside of our CAL Suites.

### Are CALs perpetual?

Yes. When your EA expires, you will have perpetual licenses for the latest version (or any prior version) of the User or Device CALs covered in your enrollment. CALs that were upgraded during the term of your enrollment will remain at the same version number they were at the expiration of your agreement.

### How do I license external access for SQL Server?

Use the per-processor licensing model described previously.

### What is the difference between an Enterprise CAL and a Standard CAL?

An Enterprise CAL grants full access to server features, while a Standard CAL grants access to a limited list of server functions.

## Exclusive access to Windows Vista Enterprise with Software Assurance

Activating your Windows Vista Enterprise benefit can help you lower IT costs and risks. Gain the ability to protect lost, stolen, or recycled computers, run UNIX applications in a native subsystem, and deploy a single image worldwide. Get data protection with Windows® BitLocker™ Drive Encryption; application migration from and interoperability with UNIX, with the Subsystem for UNIX-based Applications; and worldwide deployment, with the Multilanguage User Interface.

**Please note:** Only customers who have Software Assurance on a Windows Client have access to Windows Vista Enterprise. Follow these important steps to activate this benefit:

1. Visit <https://licensing.microsoft.com>.
2. Download Windows Vista Enterprise, and choose your preferred format for the media kit.
3. Use your Windows Vista Volume Activation, Multiple Activation Key, or Key Management Service key to activate the software. For more information, visit [www.microsoft.com/licensing/resources/vol/default.aspx](http://www.microsoft.com/licensing/resources/vol/default.aspx).

For assistance, visit [www.microsoft.com/activatesa](http://www.microsoft.com/activatesa).