



THE TRUE-UP GUIDE

> Simplifying the process

Your Enterprise Agreement (EA) with Microsoft enables you to use additional licenses for any product covered by your EA. Once a year we ask that you align your EA with the number of total licenses you've added in the previous 12 months. This is the True-Up process—a census of all the qualified desktops, users, and processors added to your organization over the course of the year. It's a way to actively manage your assets—to determine what you have, what you're missing, and what you need to add to increase efficiencies as your organization continues to grow. This document is designed to simplify and streamline the True-Up process by taking you through it step-by-step.

The True-Up process timeline

Here are a few milestones to be aware of over the next 60 days.

❑ Sixty days before your agreement expires

Your True-Up process begins with a review of your software and hardware purchases and a recap of your license growth and changes. If you need assistance with your license purchase information, you can contact your reseller or software advisor. You may also check the Microsoft® Volume Licensing Site (MVLS) at www.licensing.microsoft.com. Once you have determined what you have actually deployed, you should contact your reseller or software advisor to review any changes to the licensed products included in your EA. They may follow up with you to consult about any new products that may make sense for your business.

❑ Thirty days before

Your reseller will complete your standard order to reflect the final products in the EA and the final licensing amount.

❑ Right before

Your reseller will contact you to help ensure your order is moving forward on schedule.

❑ When your True-Up process is due

Once your reseller has received your finalized order, he or she will perform a quality assurance review and then place the order with Microsoft.

❑ Following your True-Up process

After your order is placed, you will receive confirmation of your True-Up order from Microsoft.

About your Enterprise Agreement

Your Microsoft Enterprise Agreement (EA) offers your organization a cost-effective way to acquire the latest Microsoft technology to help standardize your IT infrastructure and simplify license management. If you have Software Assurance as part of your EA, you have the added advantage of a comprehensive maintenance offering that combines the latest software with 24/7 phone support, training, and IT tools that can help you deploy, manage, and migrate software. Additionally, your EA can help reduce the time you spend managing your software licenses by streamlining the procurement process; with your EA, you only need to place one order a year.

Your EA has a three-year term, with the option to renew after each cycle. As part of the agreement, for every year of the EA, your company is required to perform a True-Up exercise to inventory the number of servers running Microsoft software, CPUs, desktops, and underlying OS licenses that have been added during the previous 12 months.

You may place any number of True-Up orders throughout the calendar year, but at least one must be placed in each year of the EA cycle, no later than 15 calendar days after the anniversary of the EA enrollment date.

If you did not use any additional EA products within the calendar year, you are still responsible for submitting a zero-usage True-Up order. Conversely, if you start using Microsoft products during the previous 12 months that aren't included in your EA, you will need to talk with your reseller or software advisor about placing a new order to have these products added to your EA.

Your business is growing—how does that affect your EA?

Your organization is unique, and its systems, applications, and services are tailored to meet your enterprise requirements. As a result, there are a myriad of configurations of servers/CALs, management servers, operating systems, and desktop applications that may be in use at any one time. Given this situation, it is possible that your system configuration will change over the course of the EA license cycle, resulting in an increase in some licensed products. The True-Up process will address the changes in specific product licenses as well as overall number of licenses for operating systems.

These systems and services vary by each customer, so there is not one typical scenario that is followed. Some sample questions you should ask to help identify possible areas of growth and change are:

1. Did our PC or employee base grow this year?
2. Did we make any acquisitions?
3. Did we increase the number of our servers? Did we cluster any of them? Did we set any of them for warm or hot disaster recovery?
4. Did we roll out any desktop applications, such as Microsoft Office Project, Microsoft Office Visio®, Microsoft Office OneNote®, or Microsoft MapPoint®?
5. Did we put into production any piloted products or applications?
6. Are we using a software asset management system to provide data for the True-Up?

True-Up in three steps

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To determine your True-Up, you must first inventory your desktops, servers, and underlying operating systems. There are two different ways to accomplish this:

- An **automated process** conducted by a software inventory tool. You can use Microsoft Desktop Optimization Pack, Systems Management Server, System Center Essentials, or another asset inventory tool to create a complete inventory of the applications running in your organization.
- A **semi-manual or fully manual** process conducted by you and your staff. Be sure to determine the date all your applications were put into service and include the actual number of servers, processors (CPUs), desktops, underlying OS licenses, and CALs. The manual process can be streamlined, but it does require a more hands-on collaboration with your reseller or software advisor.

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Next, review your Microsoft License Statement (MLS), an easy-to-read online statement that allows you to see exactly what you are licensed for and determine what agreements you can consolidate. You can view or download your statement by visiting www.MicrosoftLicenseStatement.com. If you received your True-Up notice via e-mail or mail, you can use your Customer ID and Access Codes to obtain your organization's MLS.

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Lastly, compare your MLS to your total inventory. If you find you have deployed more licenses than you have licensed on your EA, you must submit a True-Up for the difference. Your reseller can work with you to review the results of your inventory report and MLS, and adjust EA licenses as necessary. Take into consideration both your hardware purchases and overall licensing use throughout the True-Up order timeframe.

What systems need to be inventoried?

All devices included in your EA must be inventoried as part of the True-Up process—including all servers, personal computers (desktops, laptops, and terminals), and mobile devices (PDAs and cell phones) that use Microsoft-licensed software.

In addition to hardware, all Microsoft application software must be reviewed. The application systems listed on the following page are representative of EA application components that may be covered in your EA and are thus possibly part of the True-Up exercise.

Furthermore, you also need to inventory the number of User CALs and Device CALs within your enterprise. User CALs provide a many-to-one relationship and allow multiple users to use a single device to access software (e.g., call center terminals, airport kiosks, and so on). Device CALs provide the familiar one-to-one relationship for a device to access software. Windows Server® 2003 R2 allows a server to be set to accept either of these CALs, but not both at the same time—so it is very important to inventory and review this information during your True-Up process.

Which application systems may be covered in your EA?*

Microsoft Servers – Servers/CAL

- Microsoft Exchange Server 2007
- Microsoft Exchange Server 2007 Unified Messaging
- Microsoft Office Live Communications Server 2005
- Microsoft Office Communications Server 2007
- Microsoft Office Project Server 2007
- Microsoft Office Project Portfolio Server 2007
- Microsoft Office SharePoint® Server 2007
- Microsoft SQL Server™ 2005
- Microsoft Visual Studio® 2005 Team Foundation Server
- Microsoft Core CAL Suite
- Microsoft Enterprise CAL Suite
- Microsoft ProClarity® Analytics Server
- Microsoft Forefront™ Security for Exchange Server
- Microsoft Forefront Security for SharePoint
- Microsoft BizTalk® Server
- Microsoft Virtual Server 2005
- Windows Server 2003
- Windows Server 2008
- Microsoft Internet Security and Acceleration Server 2006
- Microsoft Office Business Scorecard Manager Server

Microsoft Servers – Management Servers

- Microsoft System Center Operations Manager
- Microsoft System Center Data Protection Manager (DPM) 2006
- Microsoft System Center Configuration Manager

Microsoft Operating Systems

- Windows® XP
- Windows Vista®

Microsoft Desktop Applications

- Microsoft Office Professional Enterprise 2007
- Microsoft Office Standard 2007
- Microsoft Office OneNote 2007
- Microsoft Office Communicator
- Microsoft Office Groove® 2007
- Microsoft Office PowerPoint® 2007
- Microsoft Office Word 2007
- Microsoft Office Excel® 2007
- Microsoft Office Outlook® 2007
- Microsoft Office Project Professional 2007
- Microsoft Office Project 2007
- Microsoft Office Visio Professional 2007
- Microsoft Office Visio Standard 2007
- Microsoft Visual Studio 2005 Professional Edition
- Microsoft Office Access™ 2007
- Microsoft Office InfoPath® 2007
- Microsoft Office Small Business Accounting 2006
- Microsoft Office Publisher 2007
- Microsoft Office SharePoint Designer 2007

*Consult your EA for the full list of products you need to True-Up for.

Smart strategy—use this year to prepare for next

Once you've completed your True-Up process, you should retain a copy of your inventory in order to use it in the future. This is especially important if you do not have Microsoft Desktop Optimization Pack, Systems Management Server, System Center Essentials, or another asset inventory tool, and must use a manual inventory process. Any amount of time you can save now may be appreciated later.

We also recommend that you consider performing interim quarterly inventories of your licensed IT infrastructure, in order to reduce the time it will take to perform your annual True-Up.

Questions? Comments?

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