

Are Your People Ready to Create Winning Content?

Collaborative Content Creation with the 2007 Microsoft Office System

White Paper

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Contents

Executive Summary	1
Introduction	2
The New World of Work: Impeding Efficient Content Creation	2
The Document Creation Lifecycle: Context Is Key.....	3
The Microsoft Office System: Streamlining Content Creation	4
Conception and Idea Gathering	4
Creation and Revision	6
Workflow, Publishing, and Retrieval	7
Scenario 1: A Mutual Funds Company Uses Microsoft Office to Respond to an RFP	9
Scenario 2: A Marketing Department Coordinates Vendors Using Microsoft Office.....	10
Scenario 3: Microsoft Office Helps a Government Agency Create New Policy	11
Scenario 4: Four Students Use Microsoft Office to Write a Joint Term Paper	12
Conclusion	13

Executive Summary

More than ever, collaboration is critical to business success. In particular, the ability to collaboratively create new content—whether a sales proposal, a market analysis, a new government policy or a clinical trial report—is vital to organizations across dozens of industries. Organizations need to give employees tools that enable them to find information and subject matter experts, collect raw material, author and iterate new documents, conduct workflows, and share final documents for retrieval by others across the organization. But as the work environment has become global, decentralized and virtualized, this process is not as easy as it once was. Today, the “office” is no longer just a room or building. It can be any place that information is created, shared, and stored—or any location that workers collaborate with partners, customers, and each other. As a result, information workers often lack the ever-present connectivity to the information, collaboration tools and people they require to create new content effectively.

Organizations have long relied on Microsoft® Office as the tool of choice for content creation—a trend that continues even now. The purpose of this white paper is to demonstrate how the 2007 Microsoft Office system goes well beyond content authoring by enabling information workers to simplify and streamline the entire content creation process in today’s global workplace. Specifically, Microsoft Office Enterprise 2007, Windows SharePoint Services and Microsoft Office SharePoint® Server 2007 provide integrated desktop tools and centralized services for finding and capturing ideas and concepts, drafting and revising documents, conducting workflows, and sharing final assets broadly within and across the organization.

For more information on Microsoft Office, please visit:

<http://www.microsoft.com/office/>

For more information on Microsoft Office Enterprise 2007, please visit:

<http://www.microsoft.com/office/suites/enterprise>

For more information on Microsoft Office SharePoint Server 2007, please visit:

<http://www.microsoft.com/office/sharepointserver>

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Introduction

In today's new world of work, collaboration is a key driver of business goals. It has been shown that the companies who collaborate most effectively are the most successful. In fact, collaboration is twice as significant as a company's aggressiveness in pursuing new market opportunities and five times as significant as the external market environment.¹

Collaboration can take many forms, from highly unstructured activities like brainstorming and meetings to more structured processes, such as workflows and issue tracking. For the majority of organizations, however, most collaborative efforts center on creating new content, such as new product designs, business proposals, sales forecasts, and press releases. As a result, information—typically in the form of documents—is the currency that most organizations now exchange, and creating meaningful, compelling documents can represent the difference between success and failure. According to research firm Forrester, managing documents is a critical issue for all organizations today—and every department within an enterprise eventually turns toward the IT department for help.²

Organizations today must supply information workers with the tools required to navigate the complexities of the global marketplace and swiftly surmount the challenges that can impede effective, collaborative content creation. Throughout this document, we will demonstrate how Microsoft® Office Enterprise 2007, Windows SharePoint® Services, and Office SharePoint Server 2007 provide information workers with an integrated collaborative environment to effectively create new content in the new world of work. We will also provide real-world business scenarios that demonstrate how the various desktop tools and centralized services provided with the 2007 Office system can be used in concert to simplify and streamline content creation.

The New World of Work: Impeding Efficient Content Creation

Organizations are faced with a rapidly changing work environment, in which traditional barriers of geography and organization are breaking down. These shifts in how people work can erode productivity, and hinder the creation of effective content. Specific challenges include:

1. **Geographically-dispersed workgroups.** Teams working together to produce content are rarely in the same geographical location. For instance, a sales team creating a proposal may never meet face-to-face. As a result, it may take longer to complete documents, possibly resulting in lost opportunities.
2. **Cross-organizational teamwork.** Third parties—including customers, partners and suppliers—are often a key component of the content creation process. For instance, developing marketing materials requires close collaboration with various vendors, such as public relations, advertising and branding firms. But they may not all have access to the same information and tools, leading to missed deadlines and delays, along with eroded revenue and profits.
3. **Mobility.** In the past, “mobility” meant literally working while on the go. But now, a mobile worker can be defined as anyone who works occasionally from somewhere other than his or her primary office location, such as a customer or partner office or even at home. Employees at many organizations today work at locations other than their primary office. Unfortunately, productivity can be lost when workers cannot easily connect to the corporate network to utilize content creation and collaboration tools.

¹ “Meetings Around the World: The Impact of Collaboration on Business Performance,” *Frost & Sullivan* (sponsored by Verizon Business and Microsoft)

² McNabb, Kyle, “How to Drive Document Management Adoption,” *Forrester*, September 7, 2006.

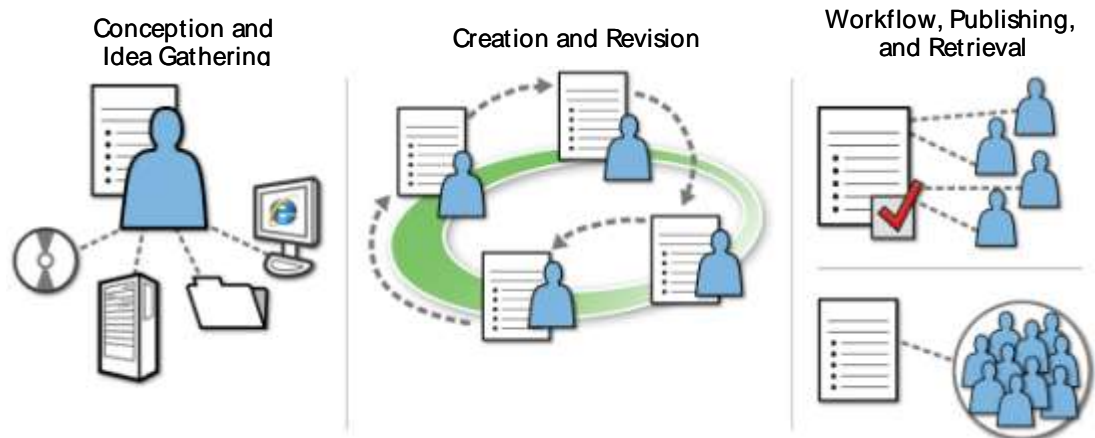
4. **Information overload.** As if the decentralized workplace weren't difficult enough, individuals and teams also contend with an ever-increasing volume of information each day. As a result, workers often spend more time searching for an e-mail thread or the latest version of a file, taking time away from producing high-quality content.

The Document Creation Lifecycle: Context Is Key

Today, it is not enough merely to create documents and make them available to others. Information presented without the appropriate framework can be meaningless. Providing the right context for creating and distributing documents is essential for delivering high value materials to the right audience. Each phase of the document creation lifecycle may require different tools for employees to be most effective

To better understand the key behaviors behind successful content creation, it is useful to divide the process into the following three distinct phases:

- 1) **Conception and Idea Gathering.** During this initial phase of content creation, people search for, gather, and organize pieces of information that will eventually make up the document. As the most unstructured part of the process, workers mainly need tools that will allow them to find, capture, and organize their notes, research, and ideas. They also need tools to help them locate and contact subject matter experts.
- 2) **Creation and Revision.** In the content creation and revision stage, workers require powerful authoring tools to quickly and easily turn their raw material into compelling documents. Then they need self-service collaboration tools to pull together the right teams of people to share the documents, gather feedback, exchange ideas, and integrate the content in a dynamic way.
- 3) **Workflow, Publishing, and Retrieval.** After documents reach the point where they are near final, they typically need to go through appropriate review cycles, be published to the department or organization as a whole, and shared in ways that allow them to be easily discovered and retrieved later.



The Microsoft Office System: Streamlining Content Creation

The 2007 Microsoft Office system enables information workers to collaborate dynamically and effectively from any location to conceive, author, iterate, approve, and share content in the new world of work. Together, Office Enterprise 2007, Windows SharePoint Services, and Office SharePoint Server 2007 provide the essential mix of desktop software programs and centralized services to streamline content creation. Capabilities include:

- Robust, contextual search capabilities and rich information gathering tools that allow individuals to quickly and easily find, collect, and organize the raw material that drives new content.
- A complete suite of enhanced document authoring programs that enable individuals to create compelling documents, presentations, spreadsheets, and other materials.
- Collaboration software that allows teams to work together inside collaborative workspaces to share, revise, and publish documents dynamically and effectively.
- Centralized team and departmental web sites to host near-final documents, initiate structured workflows, and share completed assets broadly as part of the corporate record.
- Unified synchronous and asynchronous communications capabilities embedded within the tools that drive all phases of content creation.

In the next section, we will take a closer look at how the specific tools and capabilities in Office Enterprise 2007, Windows SharePoint Services and Office SharePoint Server 2007 work together to streamline each phase of the content creation process.

Conception and Idea Gathering

In the conception and idea gathering phase, information workers compile information, conduct brainstorming sessions, and generally create a plan of attack. Information in this stage tends to be highly unstructured, taking the form of notes, Web clippings, audio interviews, and other documents. In addition, while collaboration at this stage is important, it is generally conducted on a one-to-one basis or between small teams.

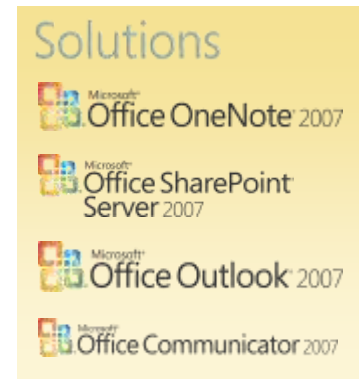
Challenges

When it comes to conception and idea gathering, individuals are tasked with finding and distilling vast quantities of information and then assimilating, organizing, and (in some cases) sharing the results. All workers face challenges when it comes to quickly and easily searching for relevant content and subject matter experts across the organization. Within a global enterprise with multiple offices and systems, it can become even more challenging. Furthermore, people tend to have highly personal ways of gathering information for later use in creating a document. For instance, one person might collect information using e-mail, while another might collate information using a word processing program. These disparate ways of organizing information can lead to a disorganized mass of notes that does not make sense to others and is difficult to share.



2007 Office System Solutions

Multiple Microsoft Office System programs, technologies and services aid in this vital first phase of content creation. Microsoft Office SharePoint Server 2007 helps individuals locate relevant content and subject matter experts, while Microsoft Office OneNote 2007 provides a flexible, digital notebook for gathering, organizing, and searching notes, ideas and information. Microsoft Office Outlook 2007 and Microsoft Office Communicator 2007 provide unified communications services that enable users to connect with others quickly and easily to help them locate and share information.



Powerful Information Search

Finding the right information and subject matter experts can be one of the most challenging aspects of this critical first phase. Office SharePoint Server 2007 and Windows SharePoint Services v3.0 simplify the process by providing powerful new features, including:

- My Sites to store, present, view, and manage content, information, and applications in a controlled fashion so that others can discover and gather information easily.
- Support for wikis—or user-editable Web sites -- that enables workers to search information on specific topics.
- Robust enterprise search, which incorporates people and business data along with documents, My Sites, and other Windows SharePoint Services team sites, to give users more comprehensive results as they are searching for unstructured information.
- Knowledge Network, which automates the discovery and sharing of undocumented knowledge and relationships across the enterprise.
- Contextual user presence awareness to support quick conversations that help identify and communicate with subject matter experts.

Flexible Organization & Sharing

Microsoft Office OneNote 2007 provides a flexible, digital notebook to collect, organize and share all relevant data in a single location. OneNote 2007 provides a wide range of new, powerful features, which include the following:

- The ability to gather a wide variety of information—such as freeform notes, images, documents, files from other Microsoft Office programs, and rich media like audio—in one convenient location
- Powerful search capabilities across text, images, and audio so users can find what they are looking for quickly, eliminating the need to sift through multiple documents or through e-mail file folders
- Two-way synchronization of tasks between Office Outlook 2007 and Office OneNote 2007 so users can keep track of designated tasks they designate as they gather information
- The ability to create a shared notebook, which allows multiple users to contribute to the notebook regardless of whether they are online or offline. All information collected offline is synchronized with the other users' copies of the notebook upon reconnection
- Full integration between with other Microsoft Office programs, so that notes can be easily shared between applications, or with others

Creation and Revision

During the creation and revision phase of the content creation lifecycle, the intangible ideas of the previous phase start to take shape. Users begin drafting documents in their authoring application of choice. Then, they must collaborate dynamically with others to hone, refine, and iterate the documents in real time.

Challenges

In today's global work environment, authoring documents and collaborating effectively with others to hone and revise them can be very difficult. To begin with, information workers need simplified authoring tools that allow them to discover all key features required to create high-quality documents. Then, the collaboration challenges set in. With file sizes increasing all the time, minutes and hours of productivity can be lost as teams struggle to effectively exchange large files. In addition, information workers who need to work off site occasionally or permanently often lack connectivity to centralized file-sharing tools. Finally, cross-office or cross-organizational teams often cannot easily share information because they lack access to the same systems.

2007 Office System Solutions

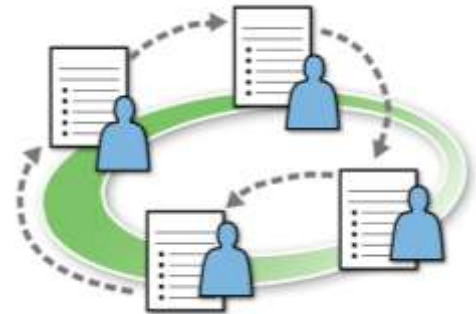
The new Microsoft Office Enterprise 2007 suite and Microsoft Office Live Meeting streamline the document creation and collaboration process. Microsoft Office Enterprise 2007 provides enhanced document authoring programs with a simplified user interface and rich new authoring capabilities. Additionally, Office Enterprise includes new team collaboration capabilities with Office Groove 2007, and enhanced communications capabilities with Office Outlook 2007 and Office Communicator 2007. Finally, Microsoft Office Live Meeting enables distributed teams to edit and collaborate on documents in real time, no matter where they are.

Powerful Document Creation

The 2007 Microsoft Office system authoring programs—including Office Word 2007, Office Excel 2007, Office PowerPoint 2007 and Office Visio 2007—offer many new features that simplify the creation of compelling documents. Some highlights include the following:

- A new interface that makes it easier for people deliver better results faster—including contextual tabs that remove all menu choices that aren't relevant and galleries that allow people to quickly and easily change the look of documents.
- New SmartArt Diagrams that allow users to extend the capabilities of Microsoft Office PowerPoint 2007 by easily creating strong and dynamic relationship, workflow, or hierarchy diagrams.
- Excel Services, which dynamically renders an Office Excel 2007 spreadsheet as HTML so others can access a spreadsheet stored Office SharePoint Server 2007 within any Web browser.
- PowerPoint Slide Libraries, enabled when using Office SharePoint Server 2007, to make it easy to build a presentation from pre-created slides.
- Expanded spreadsheet support, which eliminates the need to work within multiple Microsoft Office Excel 2007 spreadsheets or other applications to analyze large amounts of information.

Creation and Revision



- Building Blocks in Microsoft Office Word 2007 to enable users to add frequently-used content to documents with a click of the mouse, reducing the time spent seeking and entering standard text.

Dynamic Sharing and Revision

Microsoft Office Enterprise 2007 includes new capabilities for sharing and revising documents among small teams with the addition of Office Groove 2007. A new product in the 2007 Office system, Office Groove 2007 is a collaboration software program that enables teams to work together dynamically and effectively inside collaborative workspaces from any location. With Office Groove 2007, document changes are automatically synchronized between team members so that everyone has the most current file versions. Anyone can join an Office Groove 2007 workspace -- even people on different networks or at different organizations -- which means that contractors or vendors can be included in the content creation process in a natural way. Plus, embedded discussion and chat tools make it easy to get contextual feedback from team members without leaving the team workspace. In addition to the core capabilities of Office Groove 2007, there are also new features in the latest release that improve the content creation process including:

- One-click document synchronization and publishing from Groove workspaces to SharePoint document libraries.
- Integration with Office Communicator 2007 to foster rich discussions right from a Groove workspace.
- Support for 28 languages, enabling teams to create documents across geographical and linguistic boundaries.

Real Time Document Reviewing and Editing

Microsoft Office Live Meeting enables online collaboration with team members in real time—no matter where in the world people are located. With just a PC and Internet connection, people can conduct the following tasks:

- Share, review, and edit any printable document
- Collaborate effectively with features such as a whiteboard, chat, and the ability to view live Web pages

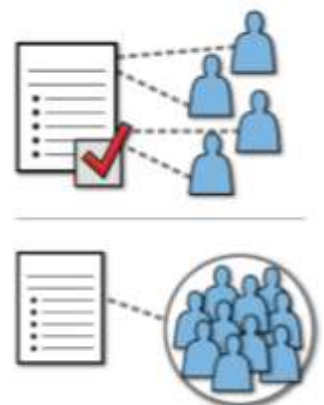
Workflow, Publishing, and Retrieval

After documents reach the “nearly final” stage, they often need to undergo a structured review workflow. For instance, executives or legal teams may need to review the document or multiple people may need to add their comments before final publication. And then, of course, there is the question of how to publish completed, approved content so it can be easily searched, discovered and retrieved by other members of the department or organization at large.

Challenges

Today, many people simply e-mail documents to the appropriate person for approval—a process that wastes time, requires follow-up e-mails and calls, and is prone to error. Publishing and storing completed documents can be similarly disorganized; many organizations store their final versions in simple file folders on a personal computer or server. With growing amounts of information, users may not be aware these resources are available to them and they have no ways to find them. Even if they know the documents exist,

Workflow, Publishing, and Retrieval



navigating to the appropriate place can be time-consuming and difficult. And in today's global workplace, it is clear that businesses need effective document workflow, storage, and retrieval both within and across organizational boundaries.

2007 Office System Solutions

Microsoft provides a robust document storage, management, publishing and retrieval solution based on Windows SharePoint Services v3.0 and Office SharePoint Server 2007. This solution provides a comprehensive set of centralized tools and capabilities to manage and control document sharing, workflow, publishing, discovery, and retrieval. In addition, Office Outlook 2007 and Office Communicator 2007 streamline document workflows and provide mobile access to the data found in these repositories.

Robust Document Sharing, Storage and Management

Office SharePoint Server 2007 and Windows SharePoint Services combine to create a complete document storage and management environment. New features include the following:

- Single-location storage and organization of all business documents and content with Office SharePoint Server 2007.
- Easy creation of a team or departmental workspace for teams to share and organize documents—within the organization and over the extranet—using Windows SharePoint Services.
- Integration between Windows SharePoint Services and Office SharePoint Server 2007 to offer enterprise-wide functionality for records management, search, workflows, portals, and personalized sites³.
- Default Office SharePoint Server 2007 repository settings that can be modified to add workflow, define retention policies, and add new templates and content types.

Powerful Document Versioning and Workflow

Controlling versions and permissions of documents is greatly simplified with the following features:

- Robust Windows SharePoint Services document storage environment with document storage, recycle bin item retrieval, and version-control features built in to team sites.
- Enhanced document management capabilities in Windows SharePoint Services to ensure the integrity of documents—such as the option to activate required document checkout before editing, the ability to view revisions to documents and restore to previous versions, and the control to set document-level and item-level security.
- Better support for accessing SharePoint document libraries while on the go with offline access in Office Outlook 2007.
- Ability to manage workflows from within Office Outlook 2007.



³ Some features require the purchase of the Enterprise CAL, which consists of the basic Core CAL (Windows Server™, Microsoft Exchange Server, Office SharePoint Portal Server and Systems Management Server), as well as enterprise data searching, spreadsheet publishing, Web-based form creation and unified messaging.

Scenario 1: A Mutual Funds Company Uses Microsoft Office to Respond to an RFP

A. Datum Corporation is a large mutual funds company that serves the needs of communities around the United States. Michelle, the regional sales director, has just received a request for proposal (RFP) from a local teacher's union to devise a strategy and roadmap for investing teacher pensions. Because this is a pilot program that could go national, she needs to put a lot of thought into her proposal and gather feedback from a number of team members.

Michelle's first step is to conduct a search of existing Office SharePoint Server 2007 content to see if a similar proposal has ever been created. She doesn't find a single proposal that meets all her requirements, but she does find several that each have similar components. Using Office OneNote 2007, she aggregates these documents along with Website research.

Next, she needs to collaborate with six of her colleagues. She wants to see if anyone has similar experience—and then to see what they recommend. But every last person with whom she needs to meet is on the road. With the Microsoft Office system, it's no problem. First, she uses the enhanced calendar mapping capabilities of Office Outlook 2007 to find a time that works for everyone. On the scheduled day, the team meets virtually, using the enhanced voice and screen sharing capabilities of Office Communicator 2007 to meet virtually.

After the call, Michelle creates an Office Groove 2007 workspace, to which she adds all the documents associated with the RFP and her notes from the meeting. Then, she invites the team to begin developing the proposal.

Fortunately, lots of their work is already done for them. With new SharePoint Files tool, they can import the company's proposal template along with key best practices from the team's Windows SharePoint Services team site directly into the Office Groove 2007 workspace. As a result, the team doesn't need to waste any time recreating documents. Over the next few weeks, the team collaboratively creates the proposal in Office Groove 2007—even though they are frequently on the road. Automatic synchronization keeps everyone on the same page, and the Discussion tool provides a single place for everyone to log their feedback.

Finally, the proposal is finished. With just a few clicks, Michelle publishes the final proposal to her team's Windows SharePoint Services site and initiates a workflow to get executive and legal approval. The executives and attorneys are notified with an e-mail message in Office Outlook 2007 when it is their turn to review the proposal, and can submit their review right from Office Word 2007.

Within three days, Michelle has full approval on the proposal. Her team submits the proposal—and lands the client. Finally, the completed proposal is indexed by SharePoint Server 2007, so other A. Datum employees developing similar proposals can find it easily.

Scenario 2: A Marketing Department Coordinates Vendors Using Microsoft Office

Fabrikam, Inc. is a large manufacturing company with hundreds of product lines—which means that the company’s multiple product marketing departments must create and maintain thousands of marketing documents, including brochures, product manuals, advertisements and other materials. To make matters more complicated, each of these product managers deals with multiple vendors who must be able to work with one another as well as with the company. As a result, Fabrikam’s marketing teams need a way to share information and collaborate effectively with multiple vendors simultaneously.

When a new product is launched, the product marketing department must create new content with the aid of its vendors. Product managers schedule a kickoff meeting using Office Outlook 2007. For each project, they set up an Office OneNote 2007 shared notebook to capture raw ideas.

After the individual components of a campaign have been decided, it is time for the vendors to start working on the documents. The department sets up an Office Groove 2007 workspace to store information and collaborate on deliverables. The document reviews are all posted in the workspace so that everyone has access to the most recent document. And using Groove, vendors can work with one another in a single collaborative space, rather than sending e-mail files back and forth. And when the marketing department wants to go through changes line by line, it’s easy; they simply schedule a Live Meeting so that all participants can view the documents and changes in real time.

Fabrikam also schedules weekly status meetings to make sure the project is running smoothly. The marketing department and its vendors meet virtually using Communicator 2007. With the enhanced screen and voice features, it’s like meeting in person—even though each company is located in a different city.

Finally, as each document is finished, it is automatically uploaded into Office SharePoint 2007, where it goes through internal executive and legal review cycles. Then, when each piece is approved, it is placed into another SharePoint document library marked “final.”

Scenario 3: Microsoft Office Helps a Government Agency Create New Policy

Contoso is a government contractor who is creating a new regional energy policy. As the energy policy is being created, Contoso must gather input from natural gas and electricity companies at each stage to ensure that the policy is feasible.

Both the natural gas and electricity companies already use Windows SharePoint Services to manage their documents. Contoso sets up an Office Groove 2007 workspace, inviting teams from both the gas and electric companies. A representative from each of these agencies searches their SharePoint libraries and uploads relevant policy documents into the workspace. This cross-organizational structure not only enables effective document sharing and collaboration, but ensures that Contoso has instant access to the information needed to build the new energy policy.

Review cycles are greatly simplified with Live Meeting. Every time substantive revisions are made, the team schedules a Live Meeting with the gas and electric company teams to go through changes in real time. Each entity can review the document live, making edits or additions as required. As a result, Contoso is assured that the policy is workable. This process also streamlines what can be a cumbersome review cycle.

After the new policy document has been reviewed and approved, it is uploaded directly into the SharePoint directories at each utility company, where they can use it to create the appropriate materials and internal changes.

Scenario 4: Four Students Use Microsoft Office to Write a Joint Term Paper

At the School of Fine Art, four students are busy writing a joint term paper on the subliminal effects of art in advertising. The project will span an entire semester. They need to work together using their laptop PCs to research, plan, and write the paper—which entails managing large amounts of data, centralizing the research of multiple team members, and collaborating on the development of multiple chapters simultaneously.

The first step is to set up a shared Office OneNote 2007 notebook. By using a shared notebook, they have a centralized repository of information so everyone has access to complete data. Each team member uses OneNote to collect class lecture notes, online research, and recorded voice interviews with design professionals. They also collect design examples, which they will eventually use to illustrate their paper.

Then it is time to get organized. The team sets up weekly status meetings, which are set up and managed using Office Outlook 2007. They also create task lists in Office Outlook 2007 to help them stay on schedule.

After the information gathering and research phase is complete, the team shifts into writing mode. They set up an Office Groove 2007 workspace so they can work together dynamically on the paper even though they are rarely together in the same place—and also to ensure they are all using the most current documents. And because there's no confusion about drafts, they're done in record time.

After the paper is finished, the team posts the final paper to the class Windows SharePoint Services team site, where the professor will access the paper to grade it. And they don't even need to log in to check whether the paper has been graded because they get an alert in Office Groove 2007 when the grade is posted. Naturally, they get an A. Finally, the team shares the paper with the rest of the department by publishing it to Office SharePoint Server 2007 directly from Office Groove 2007.

Conclusion

More than ever, organizations need new, improved ways to create, review, and manage their content. This type of collaboration is one of the most pressing business needs today—and it will continue to grow as companies continue to operate in an increasingly global (not to mention mobile) world.

Office Enterprise 2007 gives organizations the technology they need to manage every step of the content creation lifecycle. From the communication of Outlook 2007 and Communicator 2007 to the shared workspaces of Groove 2007—and on to the complete document workflow and storage found in SharePoint Server 2007 and Windows SharePoint Services—the Microsoft 2007 Office system gives organizations the collaborative technologies they need to navigate the new world of work with ease

This is a preliminary document and may be changed substantially prior to final commercial release of the software described herein.

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