
Additional License Authorizations

For Secure Content Management
software products

Additional License Authorizations

For Secure Content Management software products

This Additional License Authorizations document (“ALA”) set forth the applicable License Options and additional specific software license terms that govern the authorized use of the software products specified below, and are part of the applicable agreement (i.e., Micro Focus End User License Agreement; and/or any separate agreement that grants Licensee a license to such products (e.g., Customer Portfolio Terms or other Master Agreement); and/or Quotation) (the “Applicable Agreement”). Capitalized terms used but not defined herein shall have the meanings set forth in the Applicable Agreement. All products below are delivered electronically, unless otherwise agreed, and as such, any inconsistent terms that are stated on a purchase order or any other document issued by Customer, are void.

Products covered

Products	Non-production software class*	Term License Non-production software class (if available)
ControlPoint	Class 1	Class 3
Content Manager (Records Manager and TRIM)	Class 1	Class 3

*Additional licenses solely for non-production use may be available as specified in the Non-Production Licensing Guide found at opentext.com/about/legal/software-licensing depending on the non-production software class specified above. Any such non-production licenses will be subject to the Non-Production Licensing Guide and the applicable License Option terms and conditions set forth in this ALA.

Definitions

Capitalized terms not otherwise defined in this ALA document are defined in the governing agreement.

Term	Definition
Administrator Named User	Means a Named User who configures the system, sets up the policies and administers the control data, such as protective markings, retention schedules, classifications etc. This role applies to both Content Manager Select and Content Manager Perpetual.
Casual Contributor Named User	Means a Named User who uses other enterprise content management systems, such as SharePoint or an ISV provided interface, but need to declare finished records into Content Manager. They will mainly use the integration with their ECM system or the web client and will not update documents through Content Manager interfaces. The Casual Contributor is only available in Content Manager Perpetual.
Concurrent user	Means the software is licensed by the amount of users that simultaneously use the software at any one point in time. The software can be installed on any number of computers, provided that the actual usage of the software does not exceed the number of licenses purchased.
CPU	Means a system that contains a single central processing unit with a single integrated circuit package with a single discrete processing core.
CPU Core or CRE	Means each individual core where a CPU may have more than one core.
Database or DB	Means a container which stores application data including table structure, stored procedures, and other functionality that runs on a Database Instance.
Database Instance	Means a software application that has the sole purpose of acting as a container that hosts and executes one of more Databases.
Device or Dev	Means an addressable entity, physical or virtual, including but not limited to router, switch, bridge, hub, server, PC, laptops, handheld device or printer that resides within the range defined for interrogation and asset tracking.

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Term	Definition
Implementation	Means an installation of the software on a single Server or installed on a cluster of Servers which work together as a single installation of the software.
Inquiry Named User	Means a named user who has search rights only with a specified set of permissions assigned by the system administrator or policy manager. An inquiry user can search for permissible content and download it for use. Inquiry users are entitled to the save search function. Inquiry users are not allowed to participate in approval workflows nor are the able to insert new content into the CM repository.
Instance	Means each Implementation of the application installed on a Server.
Integration	Means a connection between a source system such as a data feeder where the data or metadata are migrated from the source to the Content Manager software.
Internal Use	Means access and Use of the software for purposes of supporting your internal operations or functions.
Knowledge Worker Named User	Means a Named User who uses Content Manager as part of their day-to-day business processes as a document management and filing system. These Named Users will take part in workflows, add and edit documents and search for information. The user type is available only in Content Manager Perpetual.
LTU	Means License To Use.
Named Administrator User	Means a Named User who configures the system, sets up operational and administrative policies and has configurable access to all permissions in the user table.
Named Inquiry User	Means a named user who is registered on the system and is able to search and access content via search directly through the CM Select interface or through a bespoke interface, including SharePoint, SharePoint Online or Office 365. There is no user fee for a CM Select Named Inquiry User, but the users must be registered on the system to access permissible content.
Named Power User	Means a named user who actively participates in the product by creating content for retention or creating and or participating in workflows for content service purposes. The Power User permissions cover a wide range of content creation, records declaration, records management and other document management functionality included in the product. Permissions are detailed in the CM Select Permissions table.
Named User	Means a specific individual authorized by you to access the software regardless of whether they are actively using the software.
Object	Means a discrete unit of content that has its own metadata and unique set of identifiers. Objects can include any content type, including but not limited to audio, video, text, message or document. It has to be findable in search, capable of being rendered in its native format, transported or held.
Records Coordinator Named User	Means a Named User who looks after the day-to-day records management tasks for a business unit. This includes tasks such as interaction with storage providers for physical records, printing of labels and managing the review of their business unit's records that are due for destruction. Permissions include policy and action management. The user type is available only in Content Manager.
Repository	Means a set of data locations that are grouped together for the purpose of data analysis and management.
Server <i>or</i> Svr	Means any designated computer system in which an Instance or Instances of the software is installed.
Source <i>or</i> Src	Means the production database being extracted or archived from.
TB	Means terabytes which designates the amount of physical capacity that can be managed.
Term License to Use <i>or</i> Term LTU	Means a software license to use (LTU) which indicates in its license description that the license is valid for a specific period of time such as One Month (1M), One Year (1Y) etc. Term LTU's are not perpetual licenses.
Unlimited	Means without restrictions in terms of number of systems, devices or media, depending on the context.
Use	Means to install, store, load, execute and display one copy of the software.

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Software Specific License Terms

Software products with software specific license terms are described below. Software products covered by this ALA document (as listed above) and not covered in this section do not have software specific license terms.

ControlPoint

ControlPoint is licensed by TB and based on the maximum capacity under management by ControlPoint. The calculation of the TB's required is calculated by summing up the size of all the Repositories under management. If any subset of data is analyzed by two separate repositories then this data is counted only once. Repository includes the following concepts present in ControlPoint: repository, subset, repository group.

Any amount of data that has been deleted or migrated outside the analyzed Repository by the software or in a manual matter frees ControlPoint licensing capacity that can be then reused. Said freed spaced can however be reused **only** to analyze the natural growth of the same Repository. The freed up licensing capacity can therefore not be used to analyze a new set of Repositories. Under these circumstances the customer is prohibited from pointing the product to a new Repository.

If the Repository is fully deleted or migrated from the primary Source (all of the originally analyzed files are deleted or migrated to a different location) then the freed up licensing capacity can be reused for a different Repository.

Under no other circumstances does the deletion or migration of data free licensing capacity.

ControlPoint IDOL Find Add-on is licensed by concurrent users. Provides the IDOL FIND UI for exploration and analysis of data held within the CP IDOL instance. Each SKU provides access for up to 5 concurrent users within a working day. The user count is automatically reset after each 8 hour period. Up to 10 SKUs can be purchased providing concurrent access for a maximum of 50 users.

Secure Content Manager IDOL PII image Add-on 1 ingest channel is licensed by concurrent channels of the PII_Image analysis, multiple instances can be purchased to increase through put.

Secure Content Manager IDOL OCR Add-on 1 ingest channel is licensed by concurrent channels of the OCR analysis, multiple instances can be purchased to increase through put.

Secure Content Manager IDOL Speech To Text Add-on 1 ingest channel is licensed by concurrent channels of the Speech to Text analysis, multiple instances can be purchased to increase through put.

Secure Content Manager IDOL Plus Add-on Connector is licensed by number of additional connectors required. Allows selection of 1 additional connector from the list below, multiple instances can be purchased to add further connectors

- File System (all platforms)
- ODBC
- Web / HTTP
- Facebook
- Amazon
- Twitter
- LinkedIn
- YouTube
- Instagram
- Yammer
- Weibo
- Box
- Chatter
- Confluence
- Documentum
- Dropbox
- Dynamics
- Evernote
- Exchange Odata
- Exchange WS
- FTP
- Gnip
- Google Drive
- IMAP
- Jive
- Lithium
- Lotus Notes
- OneDrive
- Oracle UCM

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- POP3
 - RSS/Atom
 - Salesforce
 - SAP Netweaver
 - SharePoint Odata
 - SharePoint Remote
 - Skype for Business
 - SourceOne
 - Twitter streaming
 - Adobe Experience Manager
 - Amazon S3
 - AzureBlob
 - CMIS
 - Content Manager
 - Digital Safe
 - Documentum PLUS
 - Drupal
 - Enovia
 - Enterprise Vault
 - Exchange Odata PLUS
 - eRoom
 - FileNet P8 PLUS
 - Hadoop
 - Hubspot
 - Object Store
 - IBM Content Manager
 - IBM Seedlist
 - Jama
 - JIRA
 - MS Planner
 - MS Teams
 - Notes PLUS
 - ObjectiveQuest Archive Media
 - Service Now
 - SharePoint Odata PLUS
 - SharePoint Remote PLUS
 - Slack

Content Manager (Records Manager and TRIM)

Content Manager is available as both a Perpetual or Subscription license model.

A **perpetual** software license is a type of software license that authorizes an individual/organization to use a program indefinitely.

Subscription software is priced on a recurring basis and is an on-going subscription, in effect the software is being rented rather than owned.

Content Manager Perpetual

Content Manager Perpetual is licensed as described below.

Content Manager (CM) is sold by edition; see product specifications for more details of the functionality included in these editions. Each customer is expected to have one edition type (but may require several edition licenses depending on quantity of production environments).

1. Editions and Volume Packages

- Base Edition
 - Provides all functionality required for basic Electronic Document and Records Management (EDRMS) along with SDK and User Interfaces, plus Workflow and SharePoint modules.
- Document Management Edition
 - Provides functionality for document process automation including imaging and workflow in addition to basic EDRMS. This includes Base edition functionality along with Storage optimization, OCR and Auto-Classification.
- Advanced Records Management Edition
 - Manage large volumes of records (physical & electronic) according to the most rigorous regulations in multiple jurisdictions in addition to daily document management needs. This edition includes Base package plus Multi-Jurisdiction Retention, Space Management, Rendering, VERS, Automated Disposition, External Warehouse Modules.
- Regulatory Record Keeping Edition
 - A volume edition is more of a “records archiving” use case than EDRMS – large volume of content, small number of users. Large volumes of records added via integrated line of business applications or by Micro Focus FAS/Control Point/SDM.

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- Migration Edition (Historical Edition, no longer available for sale)
 - Only for customers who have migrated from TRIM, ARM or Meridio implementations to Content Manager 8.10. Contains Content Manager license functionality.

Each edition includes one Administrator Named User and one Records Coordinator Named User.

The **Regulatory Record Keeping Edition** is a volume edition and has below options

CM Regulatory Record Keeping Base is licensed per pack of **100 million Objects plus 10 Named Users**, and CM Record Keeping Enterprise Edition is licensed for **Unlimited objects plus 10 Named Users**

The edition license will have further additional licenses added to it:

2. Users

Any additional users must be added according to user role:

- Administrator Named User,
- Records Coordinator Named User,
- Knowledge Worker Named User,
- Casual Contributor Named User and
- Inquiry Named User.

A Named User license may not be transferred from one individual to another unless the original Named User no longer requires and is no longer permitted to access (there are no concurrent named users in Content Manager Select or Content Manager Perpetual).

3. Volume

A volume package must be purchased, accounting for the number of meta-data records managed by CM. It is licensed per pack of 500 thousand, 1 million, 3 million, 5 million, 10 million or 100 million Objects.

4. Functional Modules

Different editions include a different selection of the below modules. If a module is not included in an edition, it can be purchased at an additional cost from the list below:

- Content Manager Optical Character Recognition
- Content Manager Auto-Classification
- Content Manager Rendering.
- Content Manager Warehouse Integration
- Content Manager Policy Center

Content Manager Regulatory Record Keeping SAP Module and Content Manager SAP Integration Module. Additionally, the below modules are included in certain editions but not available at an extra cost if not already included in the edition license:

- Space Management
- Multi-Jurisdiction Retention
- Storage Optimization

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Content Manager Select

Content Manager Select is a business model allowing organizations to pay by subscription or term. In this model, customers can purchase use of the solution for any duration between one and 5 years. The licensing is built for flexibility, so although a one year minimum commitment is required, some SKUs such as user SKUs can even be sold for a monthly duration.

Content Manager Select is sold by a single edition – Content Manager Select Edition; see product specifications for an overview of the functionality included in this edition.

The key licensing metrics are

- paid users on a defined term basis,
- volume under management (the number of meta-data records managed in the system) and
- two **optional** modules that can be purchased on the same term basis.

Licensees must purchase the CM Select edition – which includes at no additional cost:

- Five Administrator Users (user package)
- 500,000 record objects (volume package)
- subscription licenses for every administrator user named registered in the system.
- the following modules that are currently available for purchase or by bundle in Content Manager Perpetual:
 - Rendering,
 - Optical Character Recognition (limited to two channels),
 - Auto-Classification,
 - Data Warehousing and
 - Advanced Disposal Processing.
 - Space Management
 - Multi-Jurisdiction Retention
 - Storage Optimization

In addition, licensees may purchase additional:

1. User types

Content Manager Select User Types are **Content Manager Select**

- Named Administrator User, (Five administrator users are included without additional charge)
- Named Power User, and
- Named Inquiry User (The Inquiry user is free of charge and unlimited)

Please see data sheet for a permissions mapping from the 3 CM Select User types to the 5 Perpetual Users.

2. Volume - Licensees are required to purchase volume modules to manage and retain objects **in excess of 500,000 objects**.

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Additional License Authorizations for the Secure Content Management software products are classified as **Functional Modules** and **Editions and Volume Packages**.

Functional Modules

Content Manager Optical Character Recognition is sold by package and is licensed per pack of 10 million Objects or for Unlimited Objects.

Content Manager Regulatory Record Keeping SAP Module per pack of 100 million Objects or for Unlimited Objects

Content Manager Rendering is licensed by Implementation.

Content Manager SAP is licensed per pack of 10 million Objects.

Content Manager Warehouse Integration is licensed per Integration.

Content Manager Policy Center – This connector allows Content Manager to directly communicate with the Iron Mountain Policy Center, allowing for retention and legal citations to be directly attached to the metadata of records objects either ingested or created in Content Manager. It is licensed by module on implementation.

Content Manager SAP Integration – This integration, licensed by module on implementation, allows organizations to actively manage records contained in SAP by re-locating records into the Content Manager Repository.

Content Manager Auto-Classification - Content Manager Auto-Classification is sold by package; each package is licensed by Implementation.

Advanced Disposal Processing – This is licensed by module for Content Manager implementations. It is a workflow tool to Create record disposal consignments, routed via guided approval and execution processes and automated review.

Space Management – This module automatically allocates warehouse spaces to items and tracks free space within warehouses. This module is not sold separately. It is part of Content Manager Select and certain editions in Content Manager perpetual.

Multi-Jurisdiction Retention – A jurisdiction is a legal entity with the power to compel an organization to retain its records in a particular manner. Supports the concept of record retention based on the jurisdiction of the record. This module is not sold separately. It is part of Content Manager Select and certain editions in Content Manager perpetual.

Storage Optimization – This module enables support for Compression, Single instancing, and tiered storage. This module is not sold separately. It is part of Content Manager Select and certain editions in Content Manager perpetual.

Production, Non-Production, and User Licenses

Content Manager Editions are class 1 licenses for production and non-production environments, meaning that both CM Perpetual and CM Select Editions are considered class 1 and entitled 6 non-production environments. The only exception to this is when CM Select is used with additional SaaS SKUs in a hosted environment, then the license becomes class 3 (meaning extra non-prod environments must be purchased).

A single class 1 edition license entitles the customer to setup a single production and 6 non-production environments. If the customer has several production environments, then they require an equal count of edition licenses.

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For example, a customer with two production instances of CM, one in America and one in Europe, would need two edition licenses of Content Manager. Similarly, a customer with only one production instance, but 12 test environments, would need to purchase two editions of Content Manager. An on-prem customer who has migrated to CM Select but still using their on-prem solution would continue to have entitlement to their 6 non-prod environments. A SaaS CM Select customer would not have this entitlement.

A production environment is defined as follows: One production environment corresponds to one "single enterprise studio implementation", in other words one configuration file is handled by one Enterprise Studio implementation. One production environment may consist of various servers or datasets So long as they are part of a single implementation.

Visitor Access: A user registered in one dataset, say production "PROD", is a "visitor" to other dataset. Visitor users are not tallied in the licence counting. When a user logs into other data sets, the workgroup server verifies that they have been registered in the "PROD" dataset before allowing access. Thus user count can be considered the "production environment" user count. This is not the case for volume, where the total volume must be added across environments. Because all non-prod environments are expected to have a low volume and user count, we would not expect this to be a significant influence on licensing requirements.

A Named User license may not be transferred from one individual to another unless the original Named User is no longer required, and is no longer permitted to access.

Additional License Terms

Term	
A.	Any licensing terms designated as being of Autonomy that may be embedded in the software are inapplicable in their entirety.
B.	Software contains software and associated specifications licensed from third parties that are confidential to, and trade secrets of, such parties. You will not take any action other than to Use it as authorized under the agreement as part of the software products and will not disclose it to third parties.
C.	You shall install and use the software as authorized in the applicable agreement only as a complete product and may not use portions of such software on a standalone basis separate from the complete software unless expressly authorized in the Supporting Material, specifications or an applicable agreement.
D.	Unless stated otherwise, you are authorized to Use one Device at a time for your Internal Use.

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