



IBM Software Partner Academy Program

Telefonkonferenz am 03.04.2009

„Grundsätze der IBM SW-Lizenzierung“

- User Value Units –

Das benutzerorientierte Lizenz-Modell für IBM Software-Produkte

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Was ist “Value Unit” Pricing?

- Alle IBM Content Management und FileNet Produkte werden migriert und werden als **User Value Units (UVU)** vertrieben.
- Eine Value Unit ist ein
 - „*Measurement based on user population or resource usage*“
 - „**Based on usage need**, not specific user licenses“
- Enthält einen **kumulierten Discount**
 - Je größer das Nutzungsvolumen, je kleiner ist der Prozentsatz der Value Units, der lizenziert werden muss.
- Der Preis wird durch Multiplikation der Value Units mit dem Listenpreis ermittelt.



User Value Unit (UVU) Licensing



User Value Unit (UVU) Licensing

- **Authorized** User Value Unit (AUVU)
 - Für selektive Lizenzierung von internen Benutzern oder Benutzern, die im Auftrag des Unternehmens tätig sind (z.B. *Agents, Contractors, Brokers, Dealers, etc.*).
 - Ersetzt Named, Concurrent und eBusiness User Lizenzierung.



Typische AUVU Produkte (nicht vollständig oder exklusiv!)

- IBM FileNet Business Process Manager Authorized
- IBM FileNet Business Process Manager Add-On Authorized
- IBM FileNet Compliance Framework Authorized
- IBM FileNet Content Manager Authorized
- IBM FileNet Image Manager Active Edition Authorized
- IBM FileNet Image Manager Active Edition Add-On Authorized
- IBM FileNet Records Manager Authorized
- IBM FileNet Records Manager Add-On Authorized
- IBM FileNet eForms for P8 Authorized
- IBM Records Manager Authorized
- IBM FileNet Business Process Framework Authorized
- IBM FileNet App Connector for SAP R/3-J2EE Authorized
- IBM FileNet Business Activity Monitor Authorized
- IBM FileNet Connector for SharePoint Authorized
- IBM FileNet Connector for MS Visio Authorized
- IBM FileNet Image Services Authorized
- IBM FileNet Content Services Authorized
- IBM FileNet eProcess Services Authorized
- IBM FileNet Report Manager Authorized

User Value Unit (UVU) Licensing

- Authorized User Value Unit (AUVU)
- **Employee** User Value Unit (EUVU)
 - Zur kollektiven Lizenzierung aller Mitarbeiter und Personen, die im Auftrag des Unternehmens tätig sind.
 - Ersetzt ELA Employee Lizenzierung



Typische EUVU Produkte *(nicht vollständig oder exklusiv!)*

- IBM FileNet Business Process Manager Employee
- IBM FileNet Business Process Manager Add-On Employee
- IBM FileNet Compliance Framework Employee
- IBM FileNet Content Manager Employee
- IBM FileNet Image Manager Active Edition Employee
- IBM FileNet Image Manager Active Edition Add-On Employee
- IBM FileNet Records Manager Employee
- IBM FileNet Records Manager Add-On Employee
- IBM FileNet eForms for P8 Employee
- IBM FileNet Email Manager Employee
- IBM FileNet Business Process Framework Employee
- IBM Records Manager Employee
- IBM FileNet App Connector for SAP R/3-J2EE Employee
- IBM FileNet Business Activity Monitor Employee
- IBM FileNet System Monitor Employee
- IBM FileNet Connector for SharePoint Employee
- IBM FileNet Connector for MS Visio Employee
- IBM FileNet CFS for Image Svcs Employee
- IBM FileNet CFS for Content Svcs Employee
- IBM FileNet Image Services Employee
- IBM FileNet Content Services Employee
- IBM FileNet eProcess Services Employee
- IBM FileNet Report Manager Employee

User Value Unit (UVU) Licensing

- Authorized User Value Unit (AUVU)
- Employee User Value Unit (EUVU)
- **External** User Value Unit (XUVU)
 - Zur Lizenzierung von externen Benutzern
 - Ersetzt External User Lizenzierung



Typische XUVU Produkte (nicht vollständig oder exklusiv!)

- IBM FileNet Business Process Manager External
- IBM FileNet Business Process Manager Add-On External
- IBM FileNet Compliance Framework External
- IBM FileNet Content Manager External
- IBM FileNet Image Manager Active Edition External
- IBM FileNet Image Manager Active Edition Add-On External
- IBM FileNet Records Manager External
- IBM FileNet Records Manager Add-On External
- IBM FileNet Image Services External
- IBM FileNet Content Services External
- IBM FileNet Application Connector for SAP R/3-J2EE External
- IBM FileNet eForms for P8 External
- IBM FileNet eProcess Services External
- IBM FileNet Connector for SharePoint External
- IBM FileNet Report Manager External
- IBM Records Manager External

User Value Unit (UVU) Licensing



- Authorized User Value Unit (AUVU)
- Employee User Value Unit (EUVU)
- External User Value Unit (XUVU)
- **Custodian** User Value Unit (CUVU)
 - Zur Lizenzierung der Benutzerrollen E-Mail zu einer beliebigen Zeit durch den Benutzer ersetzt werden kann.
 - Ersetzt External User Lizenzierung.

Withdrawn and Replaced by AUVU!

Derzeit einziges CUVU Produkt (Stand Februar 2009)

- eDiscovery Manager
- (more to come)

Withdrawn and Replaced by AUVU!

User Value Unit (UVU) Licensing



- **Authorized User Value Unit (AUVU)**
 - Für selektive Lizenzierung von internen Benutzern
 - Ersetzt Named, Concurrent und eBusiness User Lizenzierung

- **Employee User Value Unit (EUVU)**
 - Zur kollektiven Lizenzierung aller Mitarbeiter und Personen, die im Auftrag des Unternehmens tätig sind
 - Ersetzt ELA Employee Lizenzierung

- **External User Value Unit (XUVU)**
 - Zur Lizenzierung von externen Benutzern
 - Ersetzt External User Lizenzierung

- **Custodian User Value Unit (CUVU)**
 - Zur Lizenzierung der Benutzer, deren E-Mail Adressen einer beliebigen Zeit durchsucht werden können
 - Ersetzt External User Lizenzierung

Proof of Entitlement

- SW Produkte können mehrere Lizenzformen haben!
- Mischlizenzierung ist erlaubt!

Withdrawn and Replaced by AUVU!

User Value Unit (UVU) Licensing

- "Authorized User" - An individual (named or unnamed) within or outside of the customer enterprise permitted to access the ECM software and components in any manner directly or indirectly through any means.
- Model has a built-in volume discount and lower per unit price point.
- Replaces Named, Conc, eBus User Licenses for internal users.



Authorized User Value Unit (AUVU) License Conversion Table - FINAL

Cumulative Volume Level	Minimum Authorized	Maximum Authorized	User Value Units per Authorized	# of Authorized Users in Level	Max UVUs for Each Level	Cumulative UVUs at Each Level	Cumulative Vol Disc	UVU per User at Level Max
1	1	20	1.00000	20	20	20.000	0.0%	1.000
2	21	50	0.83333	30	25	45.000	10.0%	0.900
3	51	100	0.80000	50	40	85.000	15.0%	0.850
4	101	250	0.76666	150	115	200.000	20.0%	0.800
5	251	500	0.60000	250	150	350.000	30.0%	0.700
6	501	1,000	0.50000	500	250	600.000	40.0%	0.600
7	1,001	5,000	0.47500	4,000	1,900	2,500.000	50.0%	0.500
8	5,001	10,000	0.40000	5,000	2,000	4,500.000	55.0%	0.450
9	10,001	25,000	0.36666	15,000	5,500	10,000.000	60.0%	0.400
10	25,001	10,000,000	0.33333	9,975,000	3,324,967	3,334,967.000	66.7%	0.333

User Value Unit (UVU) Licensing

1	2	3	4	5	6	7	8	9
Cumulative Volume Level	Minimum Authorized	Maximum Authorized	User Value Units per Authorized	# of Authorized Users in Level	Max UVUs for Each Level	Cumulative UVUs at Each Level	Cumulative Vol Disc	UVU per User at Level Max
1	1	20	1.00000	20	20	20.000	0.0%	1.000
2	21	50	0.83333	30	25	45.000	10.0%	0.900
3	51	100	0.80000	50	40	85.000	15.0%	0.850
4	101	250	0.76666	150	115	200.000	20.0%	0.800
5	251	500	0.60000	250	150	350.000	30.0%	0.700
6	501	1,000	0.50000	500	250	600.000	40.0%	0.600
7	1,001	5,000	0.47500	4,000	1,900	2,500.000	50.0%	0.500
8	5,001	10,000	0.40000	5,000	2,000	4,500.000	55.0%	0.450
9	10,001	25,000	0.36666	15,000	5,500	10,000.000	60.0%	0.400
10	25,001	10,000,000	0.33333	9,975,000	3,324,967	3,334,967.000	66.7%	0.333

- 1 Cumulative volume levels: you must fill up each level before going on to the next
- 2 Minimum # of users in each level
- 3 Maximum # of users in each level
- 4 # of User Value Units required for each user in each level
- 5 Total number of users in each level
- 6 # of UVUs required for the # of users in each level (#5)
- 7 Cumulative # of UVUs required to license the maximum # of users authorized by each level
- 8 Equivalent cumulative volume discount when licensing the maximum # of users authorized by each level
- 9 Effective # of UVUs required for each user in each level



User Value Unit (UVU) Licensing



- CM Authorized UVU = \$750 (Lic + SS&S 12 mo)
- Der Kunde möchte 110 Authorized Users

Cumulative Volume Level	Minimum Authorized	Maximum Authorized	User Value Units per Authorized	# of Authorized Users in Level	Max UVUs for Each Level	Cumulative UVUs at Each Level	Cumulative Vol Disc	UVU per User at Level Max
1	1	20	1.00000	20	20	20.000	0.0%	1.000
2	21	50	0.83333	30	25	45.000	10.0%	0.900
3	51	100	0.80000	50	40	85.000	15.0%	0.850
4	101	250	0.76666	150	115	200.000	20.0%	0.800
5	251	500	0.60000	250	150	350.000	30.0%	0.700
6	501	1,000	0.50000	500	250	600.000	40.0%	0.600
7	1,001	5,000	0.47500	4,000	1,900	2,500.000	50.0%	0.500
8	5,001	10,000	0.40000	5,000	2,000	4,500.000	55.0%	0.450
9	10,001	25,000	0.36666	15,000	5,500	10,000.000	60.0%	0.400
10	25,001	10,000,000	0.33333	9,975,000	3,324,967	3,334,967.000	66.7%	0.333



- Die ersten 20 Benutzer brauchen 1 Authorized UVU je Benutzer im Level 1, also
- Die nächsten 30 Benutzer brauchen 0,8333 Authorized UVU je Benutzer im Level 2, also
- Die nächsten 50 Benutzer brauchen 0,8 Authorized UVU je Benutzer im Level 3, also
- Die restlichen 10 Benutzer brauchen 0,7666 Authorized UVU je Benutzer im Level 4, also

$$20 * 1,000 =$$

$$30 * 0,8333 =$$

$$50 * 0,8000 =$$

$$10 * 0,7666 =$$

UVUs

20
25
40
8
93

- Eine Summe von 93 AUVU ist erforderlich um die Menge von 110 autorisierten Benutzern zu lizenzieren. (Das VU Conversion Tool berechnet das automatisch)
- PA Listenpreis = 93 AUVUs * \$750 = \$69.750
- PPA Preise enthalten immer Software Subscription & Support (SS&S)
- Zusätzlicher Preisnachlass kann auf den Gesamtpreis gewährt werden

Resource (RVU) Licensing

- Berechtigungen hängen von einer definierten Messgröße ab
 - **Terabyte Resource Value Unit (TRVU)**
 - *Perpetual licenses to store up to a defined number of Terabytes of content on Image Services storage devices and supported P8 Fixed File Stores.*
 - Doppelte Kapazität für High Availability, Disaster Recovery oder Backup erfordern keine zusätzlichen TRVU Lizenzen.



Typische TRVU Produkte (nicht vollständig oder exklusiv!)

- IBM FileNet IS Connector to Non-FileNet Optical
- IBM FileNet IS Connector to IBM DR550 Storage & Retrieval
- IBM FileNet IS Connector to Magnetic Storage & Retrieval
- IBM FileNet IS Connector to Centera Storage & Retrieval
- IBM FileNet IS Connector to SnapLock Storage & Retrieval
- IBM FileNet IS Connector to Sun 5x20 CAS Storage & Retrieval
- IBM FileNet P8 Connector to Centera Storage & Retrieval
- IBM FileNet P8 Connector to IBM DR550 Storage & Retrieval
- IBM FileNet P8 Connector to SnapLock Storage & Retrieval
- IBM FileNet IS Integral SDS Connector to Centera
- IBM FileNet IS Integral SDS Connector to HCAP
- IBM FileNet IS Integral SDS Connector to IBM DR550
- IBM FileNet IS Integral SDS Connector to SnapLock
- IBM FileNet IS Integral SDS Connector to Sun 5x20 CAS

Resource (RVU) Licensing

- Berechtigungen hängen von einer definierten Messgröße ab
 - Terabyte Resource Value Unit (TRVU)
 - **Pages Per Month** Resource Value Unit (PRVU)
 - *Specific to use of Capture Advanced Document Recognition systems*
 - Lizenzen, um eine fest definierte Anzahl von Seiten monatlich maximal zu verarbeiten



Typische PRVU Produkte (nicht vollständig oder exklusiv!)

- IBM FileNet Capture ADR-Fixed Form
- IBM FileNet Capture ADR-Free Form
- IBM FileNet Capture ADR-Fixed & Free Form
- IBM FileNet Capture ADR-Bank Verification
- IBM FileNet Capture ADR-Postal Validation
- IBM FileNet Capture ADR-Statistics & Reporting
- IBM FileNet Capture ADR-Classification & Separation

Resource (RVU) Licensing

- Berechtigungen hängen von einer definierten Messgröße ab
 - Terabyte Resource Value Unit (TRVU)
 - Pages Per Month Resource Value Unit (PRVU)
 - **Processor-based** Value Units (PVU)
 - Lizenz für jeden Prozessorkern, auf dem die SW genutzt wird



Das 'License Conversion Table Tool'



VU Tables with Calculators-FINAL3.xls [Compatibility Mode] - Microsoft Excel

Cumulative Volume Level	Minimum Authorized	Maximum Authorized	User Value Units per Authorized	# of Authorized Users in Level	Max UVUs for Each Level	Cumulative UVUs at Each Level	Cumulative Vol Disc	UVU per User at Level Max
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3	51	100	0.80000	50	40	85	15.0%	0.850
4	101	250	0.76666	150	115	200	20.0%	0.800
5	251	500	0.60000	250	150	350	30.0%	0.700
6	501	1,000	0.50000	500	250	600	40.0%	0.600
7	1,001	5,000	0.47500	4,000	1,900	2,500	50.0%	0.500
8	5,001	10,000	0.40000	5,000	2,000	4,500	55.0%	0.450
9	10,001	25,000	0.36666	15,000	5,500	10,000	60.0%	0.400
10	25,001	10,000,000	0.33333	9,975,000	3,324,967	3,334,967	66.7%	0.333

There is no concurrency ratio offered since we already have built in volume discounts and lower prices.

Cumulative # of Authorized Users desired: <-input total # of Authorized Users desired, including users previously licensed
 Cumulative # of AUVUs required: <-this is the # of Authorized UVUs required to license 1,000 Authorized Users

SUBTRACT

of AUVUs previously purchased: <-input # of Authorized UVUs the customer previously purchased here
 # of Authorized Users previously licensed: <-this is the # of Authorized Users already licensed via 200 Authorized UVUs

EQUAL

of new Authorized Users to license: <-this is the # of new Authorized Users that need to be licensed
 # of AUVUs required for 750 new Authorized Users: <-this is the # of Authorized UVUs the customer needs to purchase now

Volume Level	Explanation	AUVUs
1	First 20 users, each require 1.00000 Authorized UVU so 20 * 1.00000 = 20 AUVUs	20
2	Next 30 users, each require 0.83333 Authorized UVU so 30 * 0.83333 = 25 AUVUs	25
3	Next 50 users, each require 0.80000 Authorized UVU so 50 * 0.80000 = 40 AUVUs	40
4	Next 150 users, each require 0.76666 Authorized UVU so 150 * 0.76666 = 115 AUVUs	115
5	Next 250 users, each require 0.60000 Authorized UVU so 250 * 0.60000 = 150 AUVUs	150
6	Next 500 users, each require 0.50000 Authorized UVU so 500 * 0.50000 = 250 AUVUs	250
Total AUVUs		600

Definitions:

- "Authorized User" means an individual (named or unnamed) within or outside of your Enterprise permitted to access the Program or any Program component in any manner directly or indirectly (e.g., via a multiplexing program, device, or application server) through any means.
- "Enterprise" means any legal entity that at all times (i) is your own or have under Your common control by a factor of fifty percent (50%) or more and (ii) that is the

AUVU EUVU XUVU CUVU TRVU PRVU



- **IBM Passport Advantage Sub-Capacity Licensing Website:**
<http://www-306.ibm.com/software/lotus/passportadvantage/subcaplicensing.html>

- **IBM License Metric Tool**
<http://www-306.ibm.com/software/tivoli/products/license-metric-tool/>
<http://www-01.ibm.com/software/lotus/passportadvantage/ibmlicensemetrictool.html>

- **Tivoli License Compliance Manager (distributed systems)**
<http://www-306.ibm.com/software/tivoli/products/license-mgr/>



IBM Software Partner Academy Program

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Vielen Dank für Ihre Aufmerksamkeit!