

HPRM 8.1 Licensing model explained

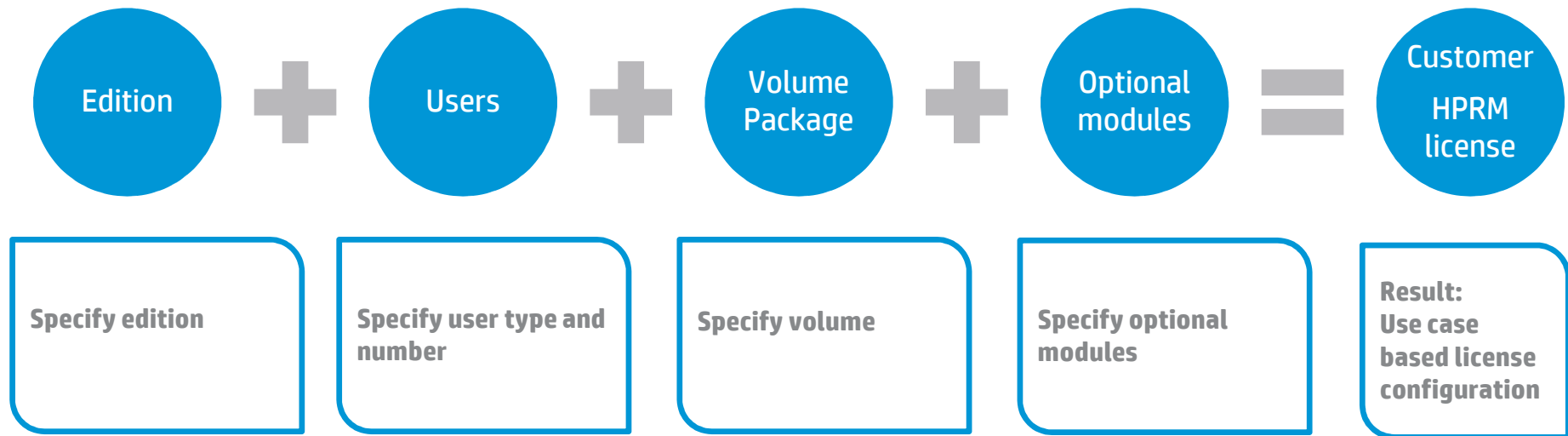


**TRIM User Group – Victoria
City of Kingston, 19 August 2014**

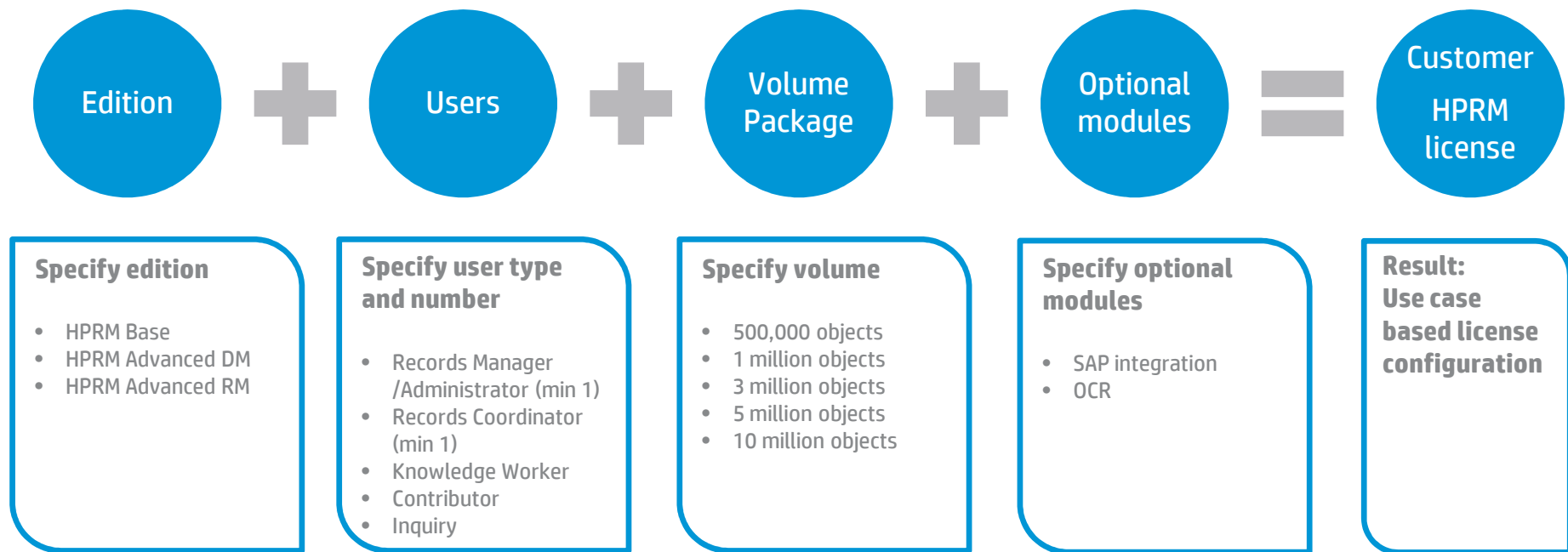
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What an HP RM8.1 license looks like



HPRM 8.1 License Editions



HPRM Base Edition

Who buys this edition and what do they get?

Target user	
Small to medium enterprise private sector	Provides all functionality required for basic Electronic Document and Records Management (EDRMS) for this user.
Inclusions	
Core document & records management	Classification plan & thesaurus Retention schedules Integration with MS Office suite of applications Mail integration MS Outlook & Lotus Notes mail Security & access controls (levels, caveats/privacy markings & access controls) Audit logs Web client HTML5 (supports laptops and mobile devices)
MS SharePoint integration	Records management & archiving of SharePoint content & sites
Workflow	Graphical workflow that supports parallel processes, decision branches, loopback, escalation and supporting documents.
Optional modules	SAP integration, OCR, Auto-classification, Advanced Disposal Processing, Rendering (includes VERS), Warehouse integration



HPRM Advanced Document Management Edition

Who buys this edition and what do they get?

Target user	
Small, medium & large enterprise, private sector	Provides functionality for document process automation including imaging and workflow in addition to basic EDRMS.
Inclusions	
Base edition	Core document & records management MS SharePoint integration Workflow
Storage optimization	Compression, Single instancing and tiered storage
OCR	
Auto-classification	
Optional modules	SAP integration, Advanced Disposal Processing & Rendering (includes VERS)



HPRM Advanced Records Management Edition

Who buys this edition and what do they get?

Target user

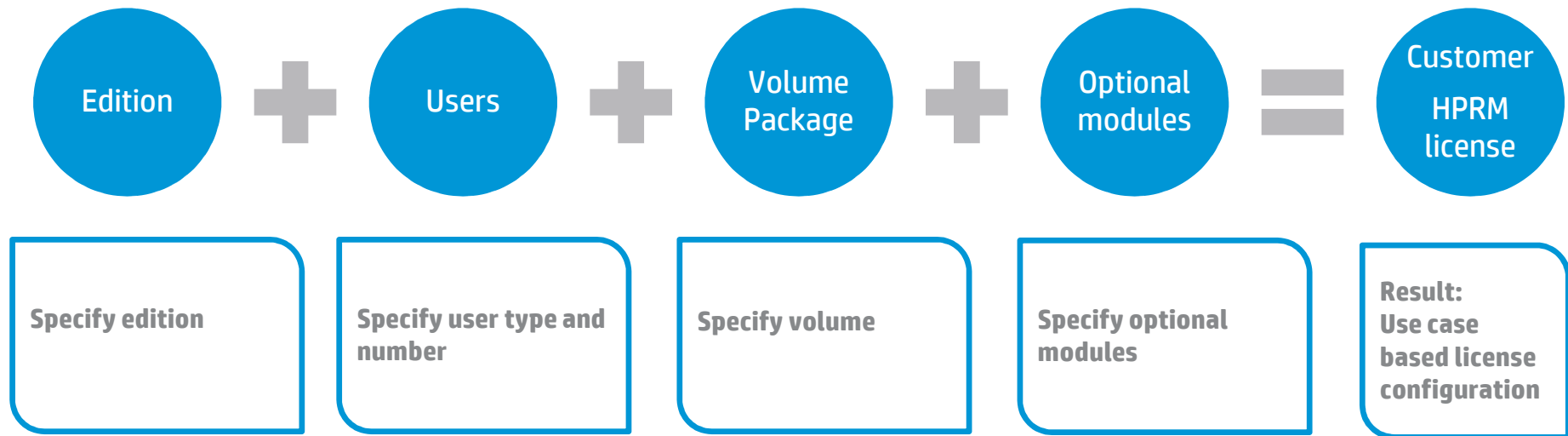
Government and regulated industry organizations	Provides functionality to manage large volumes of records (physical & electronic) according to the most rigorous regulations in multiple jurisdictions in addition to daily document management needs.
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Inclusions

Base edition	Multi-jurisdiction	Space management
Advanced disposal processing	Rendering	VERS
External Warehouse integration	Auto-classification	Storage optimization
Optional modules	SAP integration, OCR	



What a HPRM license looks like



HPRM User types

Records Manager / Administrator

- Core records management team
- Configure the system
- Set up the policies
- Administer the control data, such as protective markings, retention schedules, classifications etc.
- Mainly use the HPRM Desktop Client

Records Coordinator

- Power users
- Look after the day-to-day RM tasks for a business unit
- Tasks such as interaction with storage providers for physical records
- Printing of labels
- Managing review of the business unit's records due for destruction
- Mix of Desktop and Web Clients

Knowledge Worker

- Business users
- HPRM as part of day-to-day business processes
- Document management and filing system
- Workflow
- Document creation & editing
- Search
- Interact with customers
- Mainly use Web Client and thin email and Office integration

Contributor

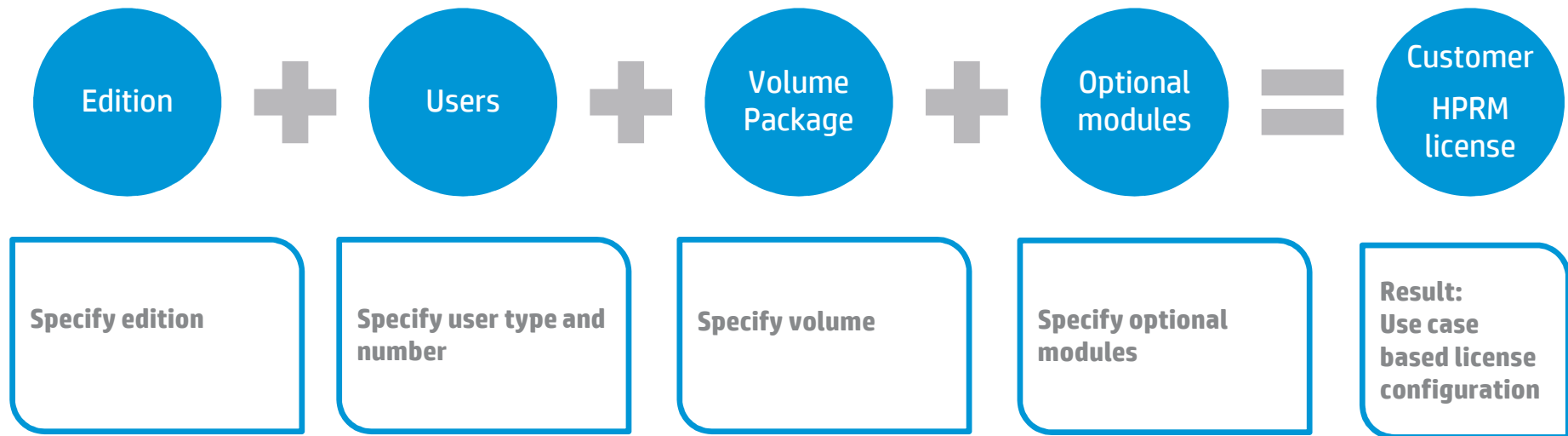
- Business users
- Use other ECM systems, such as WorkSite or MS SharePoint
- Need to declare finished records into HPRM
- Mainly use the integration with their ECM system or the web client
- Will not update documents through HPRM interfaces

Inquiry (kiosk)

- Inquiry only users
- Consume information added by other users
- Do not contribute themselves
- Search & view records
- E.g. Shop-floor workers accessing policy documents and work instructions
- Mainly use the web client or bespoke portals



What a HPRM license looks like



Volume packages

Create mandatory volume packages to provide clarity for use cases

- **HPRM cannot differentiate between content bulk loaded or ingested by users**
 - Three distinct value propositions: user, volume and user-volume
- **Five “volume packages” created to support various use cases**
- **Every (new) 8.1 implementation must include a minimum volume package of 500K objects**
- **Current product can count users and objects**

Volume Package
500,000 objects
One (1) million objects
Three (3) million objects
Five (4) million objects
Ten (10) million objects



A new 8.1 implementation

Must have:

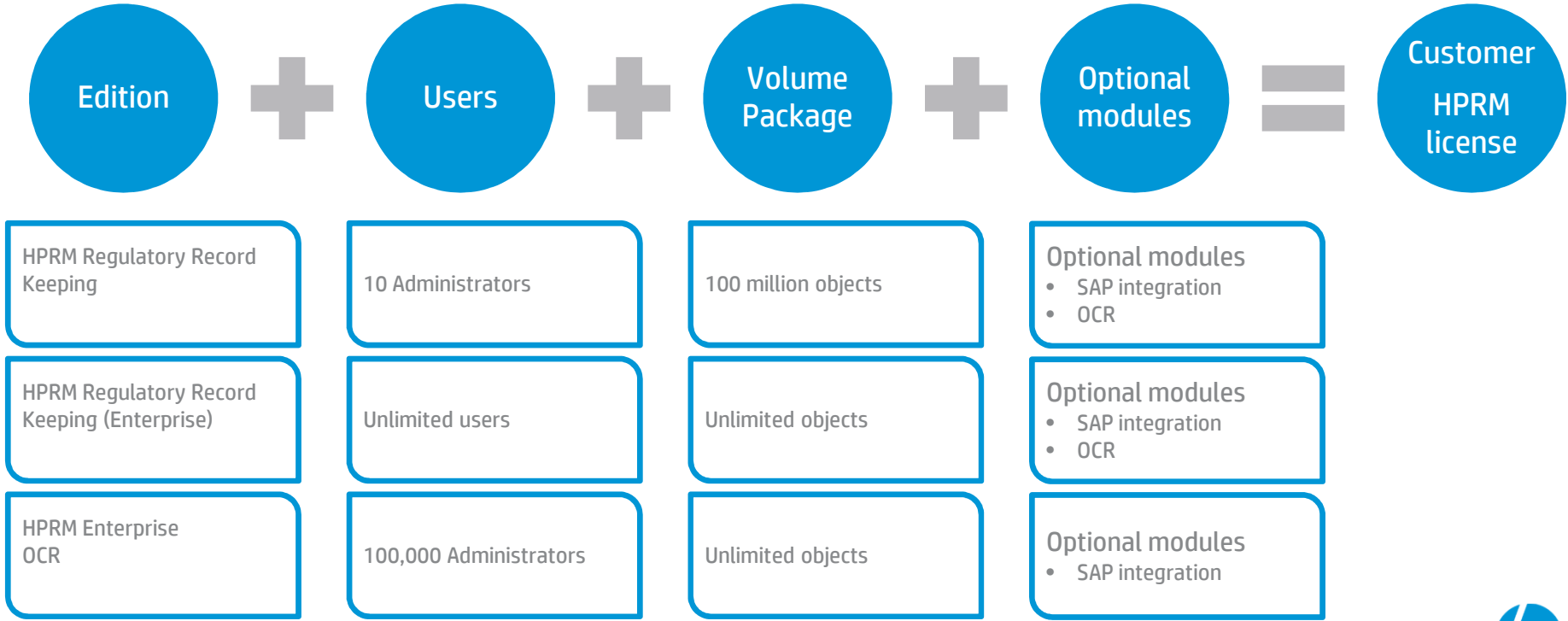
- A use case edition
- Minimum of two users (one Administrator + one Records Coordinator)
- Volume package

Optional:

- SAP Module
- ORC Module (if not included)
- Auto-Classification Module (if not included)



HPRM Volume based editions



HPRM Volume Editions

Who buys this edition and what do they get?

Target user

Large enterprise: Private sector, government or regulated industry	<p>HPRM used as more of an “records archiving” solution than an EDRMS. Large volumes of records added via integrated line of business applications or by HP ControlPoint/SDM. Day to day user interaction and document management tasks are minimal. Large volume of content as opposed to large volume of users</p>
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Inclusions

HPRM Regulatory Record Keeping	<p>Base edition, Storage Optimization, Multi-jurisdiction, Advanced Disposal Processing 10 Administrator users 100 million objects</p>
HPRM Regulatory Record Keeping Enterprise	<p>Base edition, Storage Optimization, Multi-jurisdiction, Advanced Disposal Processing Unlimited Administrator users Unlimited objects</p>
HPRM Enterprise	<p>All modules <u>except</u> SAP: Base edition, Storage Optimization, OCR, Auto-classification, Multi-jurisdiction, Space Management, Rendering, VERS, Advanced Disposal Processing, External Warehouse integration. 100,000 Administrator users Unlimited objects</p>

Optional modules

SAP integration



Migration Paths for Existing Customers

- **All current seats converted to Records Manager/Administrator license rights**
- **Maintain all rights and privileges for existing seat license**
- **When you require new users, you can purchase the user types.**
 - No option to convert existing licenses to new user types



Product Implementation

- License details are reported by the product
- Lists entitlement
- Calculates and shows current usage levels
- Seat licenses and volume licenses

Software License	
Licensed To	TRIM Research and Development
License Number	000001
Seats	
Seats Limited To	Unlimited
Seats Used	
Administrator/Records Manager	6
Records Co-ordinator	6
Knowledge Worker	4
Contributor	0
Inquiry User	5
Capacity	
Capacity Limited To	Unlimited
Capacity Used	
Total Storage	46 MB (49,081,643 bytes)
Total Records	26921
Workflow	✓ Licensed
Multiple Jurisdictions	✓ Licensed
HP Records Manager SharePoint Integration Rec...	✓ Licensed
HP Records Manager SharePoint Integration Arch...	✓ Licensed
HP Records Manager SAP ArchiveLink	✓ Licensed
Manage In Place	✓ Licensed
HP Records Manager Render	✓ Licensed
VEO Rendering	✓ Licensed
External Physical Storage Vendor Integration	✓ Licensed
OCR Image Processing	✓ Licensed



RM 8.1 Pricing Overview

1. **Create “editions” tied to user types that eliminate functional modules and focus on use case pricing that include module packages**
2. **Create different user types to accommodate changing market conditions**
3. **Simplify the number of SKUs from 185 to less than 50**
4. **Enhance volume packaging to differentiate between use cases and volume requirements**
5. **Provide an upgrade path for existing customers**

