Content Manager

Regardless of your organization's size and whether you are implementing a simple document management system or a complex information governance solution, the Micro Focus Content Manager licensing model allows you to optimize your investment and satisfy your specific requirements.

Product Highlights

The Micro Focus Content Manager licensing model is designed to help you take optimal advantage of the features that you require to implement your solution, without preventing you from expanding into other areas of the product at a later stage.

Key Benefits

Broad Features and Flexible Licensing

Content Manager is an electronic document and records management system (EDRMS) that covers a broad range of use cases. In its simplest form, you can implement it as a document management system for a single business process in a single business unit. At the other end of the spectrum you can use it as a cornerstone for your enterprise information governance strategy. It integrates with line of business applications and processes across the whole organization, scaling to hundreds of millions of items under management and hundreds of thousands of users.

Licensing That Matches Your Needs

Content Manager provides a flexible, tiered licensing model that allows you to leverage the breadth of functionality and implementation options available to satisfy a wide range of use cases. As your organization's needs change over time, you have the ability to adjust your license to accommodate an increase in users and volume of records or to include additional functionality. The Content Manager licensing

model provides three areas of flexibility that you can use to fine tune the license to your particular requirements:

1. Product editions
2. User types
3. Record volumes

The typical way to approach your license configuration is to start with the product edition that best matches the use case of your planned implementation. The product edition predefines the functionality bundled into Content Manager to satisfy any one of three core use cases. Micro Focus Autonomy's extensive experience implementing electronic document and records management solutions around the world has resulted in three standard product editions: the Base edition, Advanced Document Management edition, and Advanced Records Management edition.
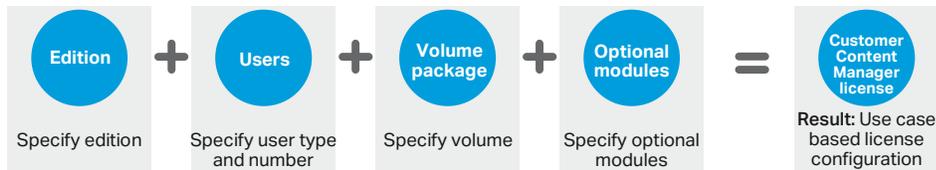
After you have selected a product edition, you can choose your combination of user types from the five available. This allows you to purchase individual seat licenses that best match each user's role, supporting the tasks they will perform and their frequency of use. Some users work at the system administrator level while others use the solution as part of their daily business process. Others may only sporadically access Content Manager to view a document. The user types allow you to optimize your investment for the functionality and level of usage you anticipate.

Key Benefits

- Offers three standard editions that support the majority of business use cases, plus six feature modules that you can add to support unique use cases

- Provides flexible, tiered licensing in standard volume packages that range from a half million to one hundred million record volumes

- Offers volume discounts and unlimited record volumes for customers with a very high number of record volumes

- Lets you configure a flexible combination of up to five types of users

- Allows you to adjust licensing to accommodate an increased number of users or record volumes, and to add new functionality

Lastly, you can determine how much information you plan to manage in Content Manager and which "volume package" you require. Today's organizations manage business documents and records from a range of sources, where the ratio of users to the volume of data under management varies significantly. You may plan to use Content Manager to interactively manage documents and records created by your staff on a day to day basis, or integrate it with line of business applications that automatically archive large volumes of records into the system with very little user intervention. Based on many years of experience and customer engagement, Autonomy has developed a volume calculator to help you determine which volume package will satisfy your requirements.

What a Content Manager License Looks Like

Edition **+** Users **+** Volume package **+** Optional modules **=** Customer Content Manager license

Specify edition — Specify user type and number — Specify volume — Specify optional modules — **Result:** Use case based license configuration

To optimize your investment in Content Manager, a Micro Focus account executive will work with you to determine the right mix of functionality, number of users and type, and data volume to be managed to best support your specific use case.

Key Features

Standard Product Editions

The following tables summarize the features included in each edition and the use cases targeted by each. All editions include the Windows and web client interfaces, as well as the software developers' kit (SDK).

Base Edition	
Standard features included	■ Electronic document management including revision and version control ■ Integration with MS Office and email applications (MS Outlook & Lotus Notes mail) ■ Electronic records management including the seamless flow of electronic documents into a finalized records state ■ Paper records management including barcode functionality and simple user requests ■ Corporate classification (categories), retention schedule, and thesaurus editors ■ Security levels, protective markings, and access controls ■ Metadata and content indexing and searching ■ Statistical and metadata reporting ■ Content Manager DataPort utility for import and export of information ■ Content Manager workflow and action tracking ■ Content Manager integration for SharePoint ■ Annotation and redaction of image files
Target use cases	■ Simple departmental electronic document and records management implementations ■ Low to medium volumes of users and documents/records under management ■ Traditional core records management requirements

Advanced Document Management Edition	
Standard features included	All features of the Base edition, plus: ■ Storage optimization, including compressions, encryption, manage-in-place, external repository, WORM and tiered storage support ■ Auto-classification to support the easy filing of automatically captured documents, for example, content coming from Micro Focus ControlPoint ■ Space management for the management of physical records in internal warehouses ■ Multi-jurisdiction retention to implement retention schedules that behave differently under different regulatory mandates, for example, across different geographies ■ Rendering to automate the creation of format renditions for redaction and archiving purposes, including the creation of Victorian Electronic Records Strategy (VERS) compliant objects ■ Advanced disposal processing to facilitate the approval and disposal processes based on record consignments ■ External warehouse integration to automatically generate and transmit orders to external storage providers, for example, Iron Mountain
Target use cases	■ The Advanced Content Manager edition is for organizations in government and regulated industries that manage large volumes of records, physical and/or electronic, against the most rigorous regulations or in multiple jurisdictions, while at the same time still providing end users access to interactively manage their documents. ■ This edition is suitable for organizations that need to comply with DoD 5015.2 or other records management standards.

Advanced Records Management Edition	
Standard features included	All features of the Base edition, plus: ■ Storage optimization, including compressions, encryption, manage-in-place, external repository, WORM and tiered storage support ■ Auto-classification to support the easy filing of automatically captured documents, e.g. content coming from ControlPoint ■ Space management for the management of physical records in internal warehouses ■ Multi-jurisdiction retention to implement retention schedules that behave differently under different regulatory mandates, for exampleacross different geographies ■ Rendering to automate the creation of format renditions for redaction and archiving purposes, including the creation of VERS compliant objects ■ Advanced disposal processing to facilitate the approval and disposal processes based on record consignments ■ External warehouse integration to automatically generate and transmit orders to external storage providers, for example, Iron Mountain
Target use cases	■ The Advanced Content Manager edition is for organizations in government and regulated industries that manage large volumes of records, physical and/or electronic, against the most rigorous regulations or in multiple jurisdictions, while at the same time still providing end users access to interactively manage their documents. ■ This edition is suitable for organizations that need to comply with DoD 5015.2 or other records management standards.

Optional Feature Modules

The product editions include a variety of features to suit the majority of use cases. If your organizations has a unique use case outside the scope of the three product editions, you can purchase additional feature modules to satisfy your requirements.

Content Manager Integration for SAP	
Target use cases	■ This module is not included in any predefined product editions. It can be purchased as an additional optional module. ■ It allows you to integrate Content Manager with your SAP solution through the SAP ArchiveLink module, supporting all the major ArchiveLink use cases.

Optical Character Recognition (OCR)	
Target use cases	■ This module is included in the Advanced Document Management edition as a standard feature. It can be purchased as an additional optional module for the Base and Advanced Records Management editions. ■ The OCR module allows Content Manager to extract text from image files and store it as a document rendition that can be indexed by Micro Focus IDOL. This allows you to make your image records searchable without relying on a third-party imaging application.

Auto-Classification	
Target use cases	■ This module is included in the Advanced Document Management and Advanced Records Management editions as a standard feature. It can be purchased as an additional optional module for the Base edition. ■ It allows records to be captured into high level entry points in your business classification and it will then automatically re-classify them into a lower level branch based on IDOL categorization. This is particularly useful if you are also purchasing ControlPoint for records auto-declaration.

Advanced Disposal Processing	
Target use cases	■ This module is included in the Advanced Records Management edition as a standard feature. It can be purchased as an additional optional module for the Base and Advanced Document Management editions. ■ It helps with the management of disposal processing by allowing you to create record disposal consignments that are then routed through a guided approval and execution process, with automated review steps along the way.

Rendering	
Target use cases	■ This module is included in the Advanced Records Management edition as a standard feature. It can be purchased as an additional optional module for the Base and Advanced Document Management editions. ■ It uses a rendering engine to create TIFF or PDF (PDF/a) renditions of electronic documents and records for the purpose of redaction and long term archiving. The module also includes the ability to create virtual Engineering Objects (VEOs) to comply with the VERS archiving standard.

External Warehouse Integration	
Target use cases	■ This module is included in the Advanced Records Management edition as a standard feature. It can be purchased as an additional optional module for the Base and Advanced Document Management editions.
	■ It will automatically process user requests for the pickup or delivery of paper records and transmit them to the external storage provider, for example, Iron Mountain. Please note that only selected storage vendors are supported, so please check suitability for your purposes before purchasing it.

User Types

For each product edition, the base license configuration includes one Administrator and one Records Coordinator user type. This is the minimum number of users any Content Manager license can have. For organizations using Content Manager to actively manage documents and records created by staff on a day-to-day basis (where staff is accessing and using Content Manager), the licensing model allows for the flexible adoption of any number and combination of user types. The following table gives an outline of the additional user type licenses that are available to configure for your Content Manager license to satisfy your implementation needs. More detailed permission tables for each user type are included in the product documentation and can be discussed with an account executive.

Records Manager/ Administrator	This user type is for the core records management team in an organization. These are the people who configure the system, set up the policies and administer the control data, such as protective markings, retention schedules, classifications, etc. These users will mainly use the Content Manager Windows client.
Records Coordinator	This user type is for the power users who look after 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. These users will use a mix of the Content Manager Windows and web client interfaces.
Knowledge Worker	This user type is for business users who use Content Manager as part of their day-to-day business processes as a document management and filing system. These users will take part in workflows, add and edit documents, search for information, and interact with customers. They will mainly use the Content Manager web client and integration with email and Office applications.
Casual Contributor	This user type is for business users who use other ECM systems, such as WorkSite or SharePoint, 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.
Inquiry User	This user type is for users who consume the information that is added to Content Manager by other users. They will search and view records, but not contribute records themselves. An example may be shop-floor workers accessing policy documents and work instructions. They will mainly use the web client or bespoke portals that leverage the SDK.
Note: While it is possible to upgrade user licenses to higher level user types, it is not possible to downgrade licenses to lower-level user types.	

Volume Packages

STANDARD VOLUME PACKAGES

At least one volume package must be purchased with any new Content Manager edition license. Different volume packages are available to mix and match to achieve the most cost-effective way to license your anticipated record volume. The volume packages are based on the number of metadata profiles and do not count document revisions or renditions separately, nor do they monitor document sizes, so they won't restrict your ability to take full advantage of Content Manager's electronic document management features.

The following records volume package sizes are available for you to choose from: five hundred thousand, one million, three million, five million, ten million and one hundred million (100M).

You can use the previously mentioned volume calculator to assist with selecting the volume package that is right for your organization.

SPECIAL VOLUME-BASED PRODUCT EDITIONS

These special product editions take into account the need for very high record volumes, such as the volumes required under some financial regulations or in very large enterprise-wide deployments. They provide either volume discounts or unlimited volumes to allow you to configure the most cost effective license possible.

Content Manager Enterprise Edition	
Inclusions	This edition includes all feature modules except for the SAP module, up to 100,000 users of the highest level user type and unlimited record volumes.
Target use cases	This edition is aimed at very large enterprises seeking to implement Content Manager as their corporate information governance platform.

Content Manager Regulatory Record Keeping Edition	
Inclusions	This edition includes the Base edition, storage optimization, multi-jurisdiction retention and advanced disposal processing, as well as 10 records manager/administrator users and management of up to 100 million records.
Target use cases	This edition is for organizations that have a regulatory mandate to capture records from their line of business applications into Content Manager in very large volumes. This usually involves integrations with line of business applications or the use of ControlPoint or Micro Focus Structured Data Manager to automatically capture and store the records.

Content Manager Regulatory Record Keeping Enterprise Edition	
Inclusions	This edition includes the Base edition, storage optimization, multi-jurisdiction retention and advanced disposal processing, as well as 10 records manager/administrator users and unlimited record volumes.
Target use cases	This edition is for organizations that have a regulatory mandate to capture records from their line of business applications into Content Manager in volumes that exceed 100 million records. This usually involves integrations with line of business applications or the use of Control Point or Structured Data Manager to automatically capture and store the records.

Edition Features Comparison

Editions	Base	Adv. DM	Adv. RM
Features			
Electronic document management including revision and version control	✔	✔	✔
Integration with MS Office and email applications (MS Outlook & Lotus Notes mail)	✔	✔	✔
Electronic records management including the seamless flow of electronic documents into a finalized records state	✔	✔	✔
Paper records management including barcode functionality and simple user requests	✔	✔	✔
Corporate classification (categories), retention schedule, and thesaurus editors	✔	✔	✔
Security levels, protective markings, and access controls	✔	✔	✔
Metadata and content indexing and searching	✔	✔	✔
Statistical and metadata reporting	✔	✔	✔
Content Manager DataPort utility for import and export of information	✔	✔	✔
Content Manager workflow and action tracking	✔	✔	✔
Content Manager integration for SharePoint	✔	✔	✔
Annotation and redaction of image files	✔	✔	✔
Storage optimization, including compression, encryption, manage-in-place, external repository, WORM and tiered storage support	X	✔	✔
Optical Character Recognition (OCR) for the extraction of textual content and subsequent indexing of image files without reliance on a scanning application	Opt.	✔	Opt.
Auto-classification to support the easy filing of automatically captured documents, for example., content coming from ControlPoint	Opt.	✔	✔
Space management for the management of physical records in internal warehouses	X	X	✔
Multi-jurisdiction retention to implement retention schedules that behave differently under different regulatory mandates, for example., across different geographies	X	X	✔
Rendering to automate the creation of format renditions for redaction and archiving purposes, including the creation of VERS compliant objects	Opt.	Opt.	✔
Advanced disposal processing to facilitate the approval and disposal processes based on record consignments	Opt.	Opt.	✔
External warehouse integration to automatically generate and transmit orders to external storage providers, for example, Iron Mountain	Opt.	Opt.	✔
Content Manager integration for SAP	Opt.	Opt.	Opt.

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