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## IBM Passport Advantage Glossary

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Passport Advantage (PA) and Passport Advantage Express (PAE) are IBM's license, Software Subscription and Support (S&S), SaaS, and Appliance acquisition programs.

This document contains descriptions of commonly used terms for the Passport Advantage programs. Note that what follows is for information only - legal definitions are contained within the respective contractual documents.

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### A-C

**Academic Volume Option** - The attachment to the IBM International Passport Advantage Agreement (IPAA) used for eligible educational institutions.

**Additional Site (PA only)** - Any defined entity, such as a physical location or organizational unit, e.g., a department, division, subsidiary or cost center, of your Enterprise that makes purchases under the applicable IPAA. Additional Sites receive Proof of Entitlements specific to their purchases, but receive pricing based on the overall Enterprise RSVP Level.

**Administration Contact** - The Administration Contact is the person who is responsible for the day-to-day management of your Passport Advantage or Passport Advantage Express Site's relationship with IBM and for the detailed management of the access to Passport Advantage Online by various parties associated with using and maintaining IBM products acquired under your Passport Advantage or Passport Advantage Express Site.

**Anniversary (PA only)** - The first day of the month that follows the month in which IBM accepts the initial order unless IBM accepts the initial order on the first day of a month, in which case the Anniversary is that day. The Anniversary is that day and month of each year thereafter.

**Authorized Additional Site Schedule (AASS, PA only)** - List of all sites of the Enterprise which the Originating Site authorizes in advance to enroll under their IPAA.

**Authorized Caller/User** - A person within a customer's site who is authorized to contact IBM Support. Authorized Caller/Users are identified by the Primary or Secondary Site Technical Contact on the Electronic Service Request (ESR) tool.

**Automatic Annual S&S Renewal** - Expiring S&S is automatically renewed to the next anniversary under the agreement terms and at the renewal charges then in effect unless, prior to the expiration date, IBM receives, either directly from you or through your reseller, as applicable, (a) your written authorization (e.g., order form, order letter, purchase order) to renew your expiring S&S; OR, (b) your written notification that you do not want to renew. If IBM does not receive such notice by the expiration date, you agree to pay such renewal charges. For legal and other reasons, Autorenewal is not applicable to customers in some

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countries; the countries are shown in the “Country Unique Terms” section of the Passport Advantage and Passport Advantage Express Agreements.

**Automatic Renewal of Fixed Term Licenses** - Expiring Fixed Term Licenses are automatically renewed for the same duration as the expiring term under the agreement terms and at the renewal charges then in effect for such program licenses unless, prior to the expiration date, IBM receives, either directly from you or through your reseller, as applicable, (a) your written authorization (e.g., order form, order letter, purchase order) to renew your expiring Fixed Term Licenses; or, (b) your written notification that you do not want to renew. If IBM does not receive such notice prior to the expiration date, you agree to pay such renewal charges. For legal and other reasons, Autorenewal is not applicable to customers in some countries; the countries are shown in the “Country Unique Terms” section of the Passport Advantage and Passport Advantage Express Agreements.

**Automatic Renewal of Selected Support** - Expiring Selected Support is automatically renewed for the same duration as the expiring term under the agreement terms and at the renewal charges then in effect for such program licenses unless, prior to the expiration date, IBM receives, either directly from you or through your reseller, as applicable, (a) your written authorization (e.g., order form, order letter, purchase order) to renew your expiring Fixed Term Licenses; or, (b) your written notification that you do not want to renew. If IBM does not receive such notice prior to the expiration date, you agree to pay such renewal charges. For legal and other reasons, Autorenewal is not applicable to customers in some countries; the countries are shown in the “Country Unique Terms” section of the Passport Advantage and Passport Advantage Express Agreements.

**Business Partner** - A company participating in the Passport Advantage Program either as a Reseller or Distributor.

**CEO Product Categories** - Special product offerings which provide per-user licensing, including S&S, of a group of associated products. Licensed users may use any or all of the functionality provided by the products included in the CEO Product Category.

**Compliance** - Use of products in a manner consistent with their terms and conditions.

**Co-term (PA only)** - To have all active S&S at a Site terminate/renew on the same date - the Anniversary. This is usually achieved by using pro-rated S&S renewal to synchronize the coverage.

**Distributor** - A company that distributes IBM products and establishes accounts with resellers to sell IBM products. Distributors have a direct business relationship with IBM.

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### D-H

**Eligible Product** - A product available through Passport Advantage.

**Enrollment (PA only)** - The process of completing and submitting the Passport Advantage Enrollment Form, registering the customer's details, and issuing the customer's Passport Advantage Agreement and Site numbers.

**Effective Date** - The date which IBM accepts the customer's initial order under their PA/PAE agreement. This will only be the same as the Anniversary if IBM accepts the initial order on the first day of a month.

**Enterprise (general)** - An Enterprise includes the customer and any legal entity that, by more than 50%, owns, is owned by, or is under common ownership with the customer's legal entity.

**Enterprise (PA only)** - All sites eligible to participate in the same Passport Advantage agreement. An Enterprise includes the customer and any legal entity that, by more than 50%, owns, is owned by, or is under common ownership with the Originating Site.

### Fixed Term Licensing

As an option, IBM licenses certain Programs for a specified period, usually 12 months. "Fixed Term" means that the duration of the license is the limited term specified by IBM in the Program's PoE, beginning;

- (a) on the date that your order is accepted by IBM;
- (b) on the calendar day following the expiration of a prior Fixed Term; or
- (c) on the calendar day following the Anniversary date, as applicable.

S&S is included with each Fixed Term license and is in effect until the Fixed Term expires.

**Government Option** - The attachment to the IBM International Passport Advantage Agreement (IPAA) used for eligible government agencies.

### I-N

**IBM Customer Number (ICN)** - The number that IBM uses to identify a customer entity for various administrative purposes, including billing. This is different than the Passport Advantage Agreement and Site Numbers. Each PA/PAE Site will have an assigned IBM Customer Number.

**Initial Order** - The first order received from a customer under their IPAA or PAE Site. For PA, the initial order sets the agreement's Anniversary and initial RSVP Level.

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**International Passport Advantage Agreement (IPAA)** is the IBM Agreement which governs the Passport Advantage relationship between the customer and IBM.

**International Passport Advantage Express Agreement (IPAEA)** is the IBM Agreement which governs Passport Advantage Express transactions between the customer and IBM.

**International Program License Agreement (IPLA)** - The base license agreement IBM uses to license distributed software worldwide. Where licenses are obtained under PA/PAE, the IPLA terms are incorporated by reference and are in some respects modified and/or overridden.

### O-P

**Originating Site (PA only)** - The customer Site that makes the initial enrollment and by doing so agrees to the terms of the IPAA for itself and for any other Additional Sites that enroll under the Originating Site's Passport Advantage Agreement. The enrollment is done by completing and submitting a Passport Advantage Enrollment Form - subject to each country's legal requirements, this may or may not require the form to be signed. The Originating Site is not necessarily the main corporate site. The Originating Site is the legal entity that is authorized to execute and administer the IPAA on behalf of its Enterprise.

**Passport Advantage** - IBM's license, S&S, SaaS, and Appliance acquisition offering designed for larger organizations including those that are multi-site and/or multinational.

**Passport Advantage Agreement and Site Number (PA only)** - The numbers assigned to a customer Site by IBM. It allows IBM and the customer to authorize and track eligible product acquisitions. The Passport Advantage Agreement and Site Number is in two parts: the Passport Advantage Agreement Number (which identifies the agreement, but not a specific Site) and the Passport Advantage Site Number (which identifies the Site participating under the designated agreement number). The complete Passport Advantage Agreement and Site Number should be quoted on all communications.

The Passport Advantage number takes the form: 11234-1234456, where:

**11234** is the Agreement Number, and

**1234456** is the Site Number

**Passport Advantage Enrollment Forms** - Forms used to enroll sites and to change contact information.

**Passport Advantage Express** - IBM's license, S&S, SaaS, and Appliance acquisition offering designed for medium sized organizations or for larger organizations implementing a departmental solution.

**Passport Advantage Express Site Number (PA only)** - The number assigned to a customer Site by IBM. It allows IBM and the customer to authorize and track eligible product acquisitions. The Passport Advantage Express Site Number should be quoted on all communications.

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**Passport Advantage Online for customers** - A set of tools for account maintenance by Passport Advantage and Passport Advantage Express customers.

**Passport Advantage Online for resellers** - A set of tools for Business Partners who sell using PA/PAE.

**Relational/evergreen Agreement (PA only)** - An agreement with no fixed expiration. Passport Advantage is an Agreement of this type.

**Points (PA only)** - Under Passport Advantage, each Eligible Product, including CEO Product Categories, is assigned Suggested Volume Price (“SVP”) points. The point value is calculated based on the undiscounted price and is used to determine the Agreement’s Relationship SVP (RSVP).

**Primary Contact** - The Primary Contact is the person who is entering into the Passport Advantage or Passport Advantage Express contractual relationship with IBM on behalf of their company. It is this person that IBM will communicate directly with on such matters as Agreement modification, etc.

**Proof of Entitlement (POE)** - IBM specifies a Eligible Product’s level of authorized use in a Proof of Entitlement (called “PoE”). Examples of the measure of the level of authorized use include, but are not limited to, the number of copies, processors, or users. This PoE, supported by your matching invoice or receipt, is evidence of your level of authorized use. The Proof of Entitlement contains:

**The customer’s:**

- Passport Advantage Agreement and Site Number or Passport Advantage Express Site Number
- IBM Customer Number
- Anniversary date
- RSVP Level

**The order’s:**

- SVP Level
- Points value
- Reference Date and Number

**And for each product in the order:**

- Product Part Number and description
- Number of licenses ordered
- Points Value
- S&S Coverage dates

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## IBM Passport Advantage Glossary

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### Q-Z

**Reseller** - A Business Partner who resells IBM distributed SW direct to end-users.

**RSVP Level (PA only)** - The entitled price level, at any given time, that is determined by the customer's purchase volume under Passport Advantage.

**Relevelling (PA only)** – The term used to describe the review of the customer's RSVP Level after each purchase and at their Anniversary. Relevelling can cause the customer's entitled price level to improve, to stay the same, or to decline, depending on transaction volume.

**Site Technical Contact** - The Site Technical Contact is the focal point for all support-related matters for the Passport Advantage or Passport Advantage Express Site and will manage access by individuals to the Electronic Service Request (ESR) tool.

**Software Subscription and Support (S&S)** - Consists of both software product upgrades and technical support. Product upgrades: The right to install and use, the most current commercially available version, release, or update, should any be made available, while S&S is in effect. Technical support: Support for software during normal business hours, with extended 24-hour, seven-days-a-week support for critical, "Sev 1", problems.

**S&S Coverage Period** - The period during which S&S is in effect for a given Site. Unless otherwise stated on a PoE, S&S coverage begins on the date of acquisition and ends on the last day of the corresponding month in the following year, unless the date of acquisition is the first day of the month, in which case coverage ends on the last day of the month, 12 months from the date of acquisition. For S&S renewal the coverage period is 12 full months or, for PA only, a pro-rated period of less than 12 full months depending on when S&S expired in relation to the Anniversary.

**S&S Reinstatement** - The coverage that a customer would have to acquire for any product for which the customer wishes to reestablish S&S after a lapse of S&S coverage. S&S Reinstatement is priced significantly higher than one year of S&S renewal.

**Special Bid** - A process used when IBM offers the customer special pricing for an order.

**Suggested Volume Prices (SVP)** - The prices assigned to Eligible Products

**Welcome Package** - A package that is sent to every new Site when it enrolls in PA/PAE. It includes the Site's Passport Advantage Agreement and Site number or Passport Advantage Express Site number, instructions for accessing Passport Advantage Online, and information about the PA/PAE programs.