Infor SyteLine Licensing

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Chapter 1:   Infor SyteLine Licensing

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Note: This document applies to Infor SyteLine 9.00 and above.

You may already have had some discussions with your sales representatives about licensing. This document explains the different types of licensing available with SyteLine.

Your License Document

You need a license document to apply your licenses. Infor provides this document in the form of a *.txt file when you purchase an Infor product. The file contains, in an encrypted format, all the information needed to apply your licenses to each application database. However, you must determine what license modules you need, and how many licenses you need for each module, before the license document can be provided.

License Modules and Tokens

Infor SyteLine includes these license modules:

Module	Access Capabilities	Session Type
SyteLineAPS	Allows you to use the APS Mode form to enable APS Finite (CTP)	Full client
SyteLineATT	Allows you to use FASView and FASMail tools (separately installed)	Full client
SyteLineAutomation	Used for IDO Access, Microsoft Outlook integration, Microsoft Project integration	IDO
SyteLineCCI	Allows you to access the Credit Card Interface forms and related buttons and fields	Full client
SyteLineCN	Allows access to the China Localization forms	Full client

Module	Access Capabilities	Session Type
SyteLineConfig	Allows you to run BuyDesign and access forms and fields relating to that product	Full client
SyteLineCRM	Allows you to enter CRM information, including estimates and orders, in SyteLine	Full client
SyteLineDev	Allows access to IDO editing forms and SQL Table/Column editing forms	Full client
SyteLineEntity	Allows access to all GL Entity forms (functions); some administrative forms such as the replication rules	Full client
SyteLineFSP	Allows access to all SyteLine Service forms, as well as related fields and buttons on other forms	Full client
SyteLineFSP_DC	Allows access to a few forms to allow users to enter Material and Labor transactions for a service order. This license is intended for technicians who need limited access	Full client
SyteLineFSP_MS	Allows a SyteLineFSP_MS user access to most of the forms in an additional site. Users with this license must have a matching SyteLineFSP license in their "Home" site	Full client
SyteLineFSPM	Allows access to all Plant Maintenance forms and related fields and buttons on other forms	Full client
SyteLineFSPM_MS	Allows a Plant Maintenance user to access Plant Maintenance-related forms in an additional site. Users with this license must have a matching SyteLineFSPM license in their "Home" site	Full client
SyteLineInquiry	Allows access to all query forms, report options forms, and Item Availability form. (Not available to new customers)	Full client
SyteLineIOF	Allows access to the Instant Order Fulfillment forms (separately installed)	Full client
SyteLineJP	Allows access to all Japan Localization forms	Full client
SyteLineMobile	Allows access to all forms that are used by a mobile device	Web form only
SyteLineMobileMultisite	Allows access to all forms that are used by a mobile device in a multi-site environment	Web form only
SyteLineMX	Allows access to all Mexico Localization forms	Full client
SyteLineOfficeIntegration	Allows you to display custom SyteLine forms such as the Sales Contacts (Office) form from inside Microsoft Office	Web form only

Module	Access Capabilities	Session Type
SyteLinePortals	Allows your customer or vendor using a portal to access IDOs	IDO
SyteLinePortals_MS	Allows your customer or vendor using a portal in a multi-site environment to access IDOs. If the portal provides access to multiple sites, assign the user a SyteLinePortals license in the primary site and a SyteLinePortals_MS license in any other site that is exposed on the portal.	IDO
SyteLinePP	Allows access to the Printing Industry Pack forms	Full client
SyteLineRFQ	Allows access to the Request for Quote forms (separately installed)	Full client
SyteLineTax	Allows access to the Tax Interface forms, as well as related fields and buttons on other forms	Full client
SyteLineTH	Allows access to the Thailand Localization forms.	Full client
SyteLineTrans	Allows access to all standard SyteLine forms.	Full client
SyteLineTransMultiSite	Allows access to all standard SyteLine forms. For users who require access to multiple sites. Assign a SytelineTrans license in the user's "home" site and a SytelineTransMultiSite license in any other sites where access is required for that user.	Full client
SLSITrans	Allows access to the Infor SyteLine Enterprise Financials interface database and forms.	Full client
SyteLineWB	Allows access to Workbenches and DataViews forms and features.	Full client
QCS_Customer	Allows access to QCS forms, which let you track quality information for items being shipped to and returned from customers (separately installed)	Full client
QCS_Enterprise	Allows access to QCS forms, which let you track quality information for business enterprise activities that are not directly linked to an item (separately installed)	Full client
QCS_In_Process	Allows access to QCS forms, which let you track quality information for manufactured items (separately installed)	Full client
QCS_Supplier	Allows access to QCS forms, which let you track quality information for purchased items (separately installed)	Full client

The modules and session types are explained in more detail later in this section.

Tokens

Each module that you purchase has a certain number of "tokens" available for users to consume, based on the number of licenses you purchased for that module. Generally, each user who logs into SyteLine consumes one or more tokens. (There are some exceptions to this rule, as discussed later.) License token consumption occurs when a user logs into the system, and the token is not released until the user logs out.

License Administration in SyteLine

License administration is performed using these SyteLine forms:

- License Management: This form indicates the dates when the license begins and ends, which modules are licensed, and how many licensed users you have. This form is where you apply the license to stay current.
- Licensed Modules: This form lists the modules for which your company is licensed for the current site.
- User Modules: Use this form to associate user names with license modules.
- License Modules Per User Connection: This form lists the license module names associated with each current user connection. Connected users consume user licenses (tokens) based on the license module to which that user has been assigned, and the session type under which they are logging in (see "Licensing by Session Type" on page 9).
- License Module Concurrent User Counts: This form lists all the license module names that are currently associated with a user connection, as well as the total number of users who are consuming a license on each module. Use this form to monitor whether your purchased license count is appropriate for the number of concurrent logins at peak times.
- Session Management: Use this form to view current user sessions, and to delete user sessions when necessary. This form also includes a column to indicate the session type.
- Sites/Entities: If this form indicates that intranet licensing is being used, licenses can only be assigned at the master site for the intranet.
- Optional Modules: This form lists the optional modules that are available by site. A system administrator must use this form to enable the base SyteLine features of optional modules for a site, after the modules are licensed. See "Licensing and Enabling Optional Modules" on page 11.

For more information about using any of these forms, see the online help.

Associating Users with Modules

The system administrator associates each user with one or more license modules. When an administrator associates a user with a module, the administrator is granting that user the license rights to use resources contained in that module. For online users, the licensed resources are the forms they run. For WebService and other automated sessions, the licensed resources are IDOs.

License rights are separate from security rights. Just because you grant a user license rights to a resource does not mean that user has security rights to access the resource. Security rights are controlled separately, by assigning users to groups and/or by allowing certain types of access (read, delete, execute, etc.) to specific objects. For more information about permissions, see the online help topic "Assigning Users to Groups."

Depending on whether you have chosen named or concurrent licensing, SyteLine consumes the license tokens in different ways.

Named Users vs. Concurrent Logins

A *named user* license links one user login to one license (through the User Modules form). For example, if you plan to have three users (bobw, jeanp, and miker) running SyteLine, you would request three SyteLine named licenses.

Named license users are only allowed one active login to a SyteLine site, and that login consumes a license. If you try to log in a subsequent time as a named user who still holds an active session, SyteLine requires the active session to be released. However, there is an exception to this: the special Multi-Session user that is provided as part of the license. This special user is described on page 8.

With named user licensing, when you associate a user with a license module, SyteLine verifies that there are remaining tokens for the module not yet associated with a user. A license module token is consumed at the time the user is assigned to that module. If a license module assignment is later removed from a user, that license module token is returned to the pool of available tokens. When the user logs in and attempts to access a form or IDO, SyteLine verifies that the user is associated with at least one license module containing the resource.

In a multiple sites per database environment, each named user can log in once per shared site, which counts as one license token against each module to which that user is assigned.

With *concurrent login* licensing, licenses are assigned to users, but the license check does not occur until users log in. If the number of users logged into a site with a particular license module is equal to the license number limit, and another user tries to log in, the site does not allow that user to log in. Using our example above, if you had two concurrent SyteLine licenses, you could assign that license to three users (bobw, jeanp, and miker). However, only two of them could use the SyteLine license token at a time. The reverse is also true - for example, miker is assigned concurrent licenses for SyteLine and SyteLineFSP - so he could be working in both functional areas while he is logged in.

Under concurrent licenses, a user can log into a certain site multiple times, as long as the total number of license tokens currently consumed in SyteLine for any module that applies to that user is less than the licensing limit for that module in that site. (A module applies to a user if that module is

assigned to that user and has the same session type as the user's connection - or has a session type of Undefined. For more information about session types, see "Licensing by Session Type" on page 9.)

With concurrent login licensing, you can associate as many users as you want with a module in a site, regardless of how many tokens you have purchased for the module. When a user logs in, SyteLine verifies that there are remaining tokens for each of the modules/session types that apply to that user, and then consumes a token (which reduces the available tokens) for each of those modules for the duration of that user's session. License module tokens consumed during a user's session are returned to the available pool when the user logs off.

Licensing in a Multiple Sites per Database Environment

For a multiple sites per database environment, see the information under "Intranet Licensing" on page 10. The requirements are similar: one license document applies to all sites and named vs. concurrent limits are enforced across all sites. In an intranet licensed environment or a multiple sites per database environment, if a named license user is logged into one site, the user can log into additional sites without having to relinquish the existing session. However, the user cannot have multiple login instances in the same site; the user must relinquish the current session to start another one.

In a one site per database environment where intranet licensing is not used, each site has its own license document and keeps track of its own tokens. Each site has no knowledge of any logins on any other site. If a user is defined in multiple sites and is logged into more than one site, whether concurrent or named, that user uses a license token for each of those logins in each site. (For information about intranet licensing, see "Intranet Licensing" on page 10.)

For one site, all the licenses must be specified as either named or concurrent - you cannot mix them.

System Users with Special Licensing

The following are special cases:

- SA User: The "sa" user doesn't require licensing. By default, that user has the ability to open any form and run any process in the site. The "sa" user should be reserved for system administration tasks and should not be used to run multi-site processes. Only one instance of the "sa" user can be logged in at any time, even under a concurrent license.
- Multi-Session (Concurrent) SL_Internal User: All SyteLine customers are given a multi-session user named SL_Internal. This capability is designed for WebService automation scenarios, where an application that is accessing the IDO layer may have multiple threads that process simultaneously, with each thread sharing the same configured SL_Internal user.

  Under a named user license, each standard user is only allowed one session per site. The multi-session SL_Internal user gives an administrator one user that can have multiple concurrent sessions. Under a concurrent license, all users except "sa" can have multiple concurrent sessions. Therefore SL_Internal provides no real significance in a concurrent license environment.

When the SL_Internal user is assigned to a license module, the tokens consumed are the number of concurrent sessions defined for that user. In other words, if the SL_Internal user is defined by the license to allow seven concurrent sessions, assigning that user to a module consumes seven license tokens for that module. Multi-session users and their concurrent session limits are defined in the license document generated by the vendor. You cannot create or modify a user to be a multi-session user.

- Infor ION: ION uses a direct connection to the application when retrieving BODs, so no license token is required.
- Infor Framework services: Framework services such as the Replicator use service sessions to connect to the application. The service session does not consume a license.

Licensing by Session Type

SyteLine allows named and concurrent licensing based on session type. Among other benefits, this feature allows named users to be logged in multiple times using different types of sessions, but only consume license modules for the appropriate type of session.

Here are some examples of the types of sessions under which a user can log in:

- When users log in from a smart client on a computer, it is a "full client" session, and they can access both forms and IDOs.
- When users log in through the SyteLine Microsoft add-in or through a SyteLine portal, it is an "IDO" session, because they access SyteLine IDOs rather than forms.
- When a user logs in from a mobile device, it is generally a "Web form only" session (that is, through a URL that includes the specification "formonly"). The "Web form only" session type also applies to forms displayed through our Microsoft Office Integration (for example, the Sales Contacts (Office) form defined in the "SyteLineOfficeIntegration" license module).

We have associated one of the following session types with each license module, as indicated in the chart on page 3:

- Full client: Used for a fully trusted client where form licensing grants permission to the form and all of the IDOs used by that form. This includes smart clients and Web clients where the Web rendering is not in form-only mode.
- Web form only: Used for Web clients in form-only mode.
- IDO: Used for programmatic (automation) access to the framework IDOs and their methods.
- Undefined: No session type is defined. You should see this only if an orphaned connection record still exists from the time before version 8.02.10 or later was applied.
- Additionally, there is a Service session type that is not associated with any module. The Service session type is used by framework utilities such as TaskMan. Under a service session, access to licensed form and IDO resources is granted without consuming any license tokens.

Verifying the License at User Login

When license checks are made during user logins, only license modules whose session type specification matches the user's current session type are considered.

If the module is associated with a session type, then a license token is only consumed for that module if the module's session type matches the user's connection session type. For example, the user **twilson** is assigned both a SyteLineTrans license (where the session type is defined as "full client") and a SyteLineMobile license (where the session type is defined as "Web form only"). When twilson logs in from his mobile device in Web form only mode, only the SyteLineMobile license is consumed. When twilson logs in using the smart client on his laptop, only the SyteLineTrans license is consumed.

Verifying the License at Runtime

After the user has successfully logged in, runtime license checks are made to determine if a certain object (form or IDO) is available to that user, based on the user's licensing and session type. Again, only modules matching the user's current session type are considered.

Otherwise, the session type is considered. Continuing our example from above, the user twilson tries to open a form that is assigned to the SyteLineTrans module but not to the SyteLineMobile module. Twilson can open the form if he is logged in from his smart client, but not if he is logged in from his mobile device.

Intranet Licensing

You can choose to set up an intranet with a master site that controls licensing for other sites on the intranet. This consolidates license administration and validation at the master site. One license document applied on the master site can service all of the sites enabled for intranet licensing on that intranet. All named user and concurrent login license checks at each of the participating sites are redirected to the master site for validation.

You can choose which sites on the intranet will use intranet licensing, through a check box on the Sites/Entities form.

You can use the Intranet Shared User Tables feature, which requires Intranet Licensing, to create and administer all users for the intranet from the master site. If you select Intranet Licensing but you do not use the Intranet Shared User Tables feature, users must be created at each participating site, and all users from all participating sites must be created at the master site as well.

A *named* user is allowed one login at each participating site on the intranet. If a named user tries to log into the same site that he is already logged into, the system requires the user to cancel the existing session first.

A user with a *concurrent* license can log in as many times on as many sites as needed, up to the license limit. Each of those concurrent logins consumes a license token.

Intranet licensing requires reliable connectivity between all participating sites. If connectivity between an intranet licensing site and its master site goes down, then all subsequent license checks will fail until connectivity is restored, so users will not be able to log in at non-master sites.

After intranet licensing has been turned on for a site, you should not turn it off without good reason. If you do, you must apply license documents to each site where you turn it off. In addition, custom objects at that site may then have incomplete licensing, if the site is not either the master site or the site at which the objects were originally created, because the appropriate licensing records for the object will not exist in the application database at that site.

License information is not replicated and no tables need to be shared specifically for intranet licensing. (However, the sites on the intranet must replicate the Site Admin category, in order to recognize the master site.) Information about how many sites are logged on using a particular license is stored in the SiteConnectionInformation table, which is kept up-to-date only at the master site.

The Session Management form reflects only the sessions for the local site. If the current site is enabled for intranet licensing, the License Modules per User Connection form shows license module use across all participating sites.

The License Management and User Modules forms are disabled at participating sites other than the master site.

Licensing and Enabling Optional Modules

The optional modules that are listed in the SyteLine Explorer are installed automatically with SyteLine. However, each module must be licensed and enabled before it can be used in a site.

Forms that are part of an optional module (that is, forms that are not included in base SyteLine) can only be opened by a user when:

- The license module has been applied to the database.
- The current user is licensed for the module.

There often are also buttons or fields related to a module that appear on base SyteLine forms, or back-end SyteLine logic that is related to a module. For example, a Pay with Credit Card button on the Customer Orders form is used only with the Credit Card Interface. These base SyteLine features of the module are handled on a site-by-site basis; you can enable them for one site in a database but not for other sites in the same database.

Use the Optional Modules form to enable the features for a specific optional module at a specific SyteLine site:

- When a module is shown as **Disabled** on this form for a site, fields and buttons related to that module are not displayed (in some cases) or are displayed but not enabled (in other cases) when any user is logged into that site. In addition, none of the back-end business logic related to that module is executed for the site.

  If a module is licensed for a database, but disabled for a particular site in that database, the site administrator should ensure that authorizations are set so that users cannot access forms which are part of the optional module.

- When a module is shown as **Enabled** on this form, any fields or buttons related to that module are displayed on base SyteLine forms, and back-end business logic related to that module is executed. However, fields or buttons are enabled only for users who are assigned the appropriate license. So in our example, the Pay with Credit Card button would be enabled only when all of these are true for the SyteLineCCI license module:
    - The license module has been applied to the database.
    - On the Optional Modules form, the license module is enabled for the site.
    - The current user is licensed for the module.

More About the License Modules

SyteLineTrans Module

Most users will be assigned a SyteLineTrans license, which provides access to most forms in SyteLine. (You can then limit individual user's access by setting up group and user authorizations.) This license module is always assigned the session type Full client**.**

Users with this license can access, edit and delete data or transactions. They cannot access, for example, the Planning Mode form, which is used to set up APS. This form is part of a separate application module and is licensed accordingly.

SyteLineTransMultiSite Module

Both SyteLineTrans and SyteLineTransMultiSite licenses allow access to most forms in the database, as described above. The SytelineTransMultiSite module is the preferred option for named users in a multi-site environment because it costs less but has the same functionality as the SyteLineTrans license. (This license module does not apply in a concurrent licensing environment.) If named users require access to multiple sites, they should be assigned a SytelineTrans license in their "home" site and a SytelineTransMultiSite license in any other sites where access is required. This license module is always assigned the session type Full client.

SyteLineTrans and SyteLineTransMultiSite license prices are calculated on a per user basis. The SyteLineTransMultiSite license applies only to the core product and does not include any optional modules.

SyteLineTransMultiSite Calculation Matrix

The sample matrix below calculates the number of multi-site users required. In this example, 3 users from Site A also need access to Site B, and 5 users from Site A need access to Site C. The total

required for Site A is 8 SyteLineTransMultiSite users. In total, 17 SyteLineTransMultiSite users are required to manage the inter-site access requirements for this sample multi-site system.

	Site A	Site B	Site C	Total
Users/Site A	N/A	3	5	8
Users/Site B	2	N/A	4	6
Users/Site C	1	2	N/A	3
Total	3	5	9	17

SyteLineAPS Module

You license SyteLine APS per user, per site. You will need as many APS licenses as you have transactional users in each site. Although the APS license provides access to only a few additional UI features, such as the APS Mode flag and the ATP/CTP switch, in reality having an APS license provides value-add to all SyteLine users. Standard SyteLine includes available to promise (ATP) and Inifinite capabilities, as well as MRP. A SyteLineAPS license adds Capable to Promise (CTP) and Finite capabilities.

This license module is always assigned the session type Full client.

Access to the Analyzer Planning and Scheduling forms is part of the basic SyteLineTrans license and is not controlled by the APS license.

SyteLineATT Module

With this license, you can use FASView and FASMail tools to view external files from within the system, and to send e-mails to external recipients with documents attached to specific fields. This module is separately installed.

This license module is always assigned the session type Full client.

SyteLineAutomation Module

This license allows other applications to connect to SyteLine through the IDO layer.If you have an Infor application such as APS that is connecting to SyteLine, you do not need an additional SyteLine Automation license.

However, integrations to external applications such as the SyteLine SharePoint IDO web parts and the SyteLine Outlook add-in require the SyteLineAutomation license module in order to log in to SyteLine and collect data. Infor allows you to request automation licenses equal to the number of SyteLineTrans licenses your company buys. For example, if your company buys 100 SyteLineTrans licenses, you can request up to 100 SyteLineAutomation user licenses.

If you plan to have custom applications connecting to SyteLine through the IDO layer, you may need to buy additional SyteLineAutomation licenses in order to have enough licenses for each application connection. This license module is always assigned the session type IDO.

For more information, see "Licensing for Automation Sessions" on page 20.

SyteLineCCI Module

Use this license module to allow users to open the Credit Card Interface forms and to see and use fields and buttons on other forms that are specific to the Credit Card Interface. This license module is always assigned the session type Full client.

SyteLineCN Module

Use this license module to allow users to open the China Localization forms. This license module is always assigned the session type Full client.

SyteLineConfig Module

BuyDesign uses this module to license per user, per site. If this product is required, you will need as many SyteLineConfig licenses as you have transactional users in each site. This license provides access to all the configuration functions (limited, however, by the user's authorizations). This license module is always assigned the session type Full client.

SyteLineCRM Module

Use this license module to allow users to enter CRM information, including orders and estimates, in SyteLine. The license provides access to certain SyteLine forms used for order entry, estimates, item availability, shipping, RMAs, and so on.

This license module does not allow users to configure products; that requires a SyteLineConfig and full SyteLineTransaction license, as described above.

SyteLineDev Module

Request this license if you plan to create or customize IDOs or SQL tables. This module allows the use of SyteLine forms that start with the prefix "IDO" or "SQL" that are used for development. This license module is always assigned the session type Full client.

SyteLineEntity Module

This license module enables users to run all forms appropriate to the entity - such as General Ledger and other financial functions - and prevents them from running non-entity SyteLine forms. In a site where the site type is "entity," all users except a system administrator should be limited to this license. (Entity users also should be set up to belong only to the Entity Forms default authorization group, which limits the forms they can see and the actions they can take.) This license module is always assigned the session type Full client.

SyteLineFSP Module

Use this license module to allow users to open the SyteLine Service forms and to see and use fields and buttons on other forms that are specific to Service. This license module is always assigned the session type Full client.

SyteLineFSP_DC Module

The SyteLineFSP_DC license module allows limited SyteLine access for service technicians who just need to use these forms:

- Service Order Labor Data Collection, to log labor transactions against a service order.
- Service Order Material Data Collection, to log material expenses against a service order.
- Partner Console, to log labor transactions by clocking on and off operations that are assigned to them, and to see their work queue.

Technicians can import data into these forms using a keyboard or a barcode Wedge reader implemented in a connected (online) mode.This license module is always assigned the session type Full client.

SyteLineFSP_MS Module

Use this license module to allow a SyteLineFSP user to access most of the SyteLine Service forms in an additional site. Users with this license must have a matching SyteLineFSP license in their "Home" site. This license module is always assigned the session type Full client.

SyteLineFSPM Module

Use this license module to allow users access to all Plant Maintenance forms and related fields and buttons on other forms. This license module is always assigned the session type Full client.

SyteLineFSPM_MS Module

Use this license module to allow a Plant Maintenance user access to Plant Maintenance-related forms in an additional site. Users with this license must have a matching SyteLineFSPM license in their "Home" site. This license module is always assigned the session type Full client.

SyteLineInquiry Module

You can use the SyteLineInquiry license for occasional or management users who only need to view information or to run reports. If the user has the appropriate authorization, this license provides access to query and reports forms, as well as the Item Availability form. This license module is always assigned the session type Full client.

New customers for SL version 8 cannot purchase this license. However, existing customers who already own SyteLineInquiry licenses can continue to use them with version 8 and can purchase additional copies.

SyteLineIOF Module

With this license, you can use the Instant Order Fulfillment module for order entry and pick/pack. This module is separately installed.

This license module is always assigned the session type Full client.

SyteLineJP Module

Use this license module to allow users to open the Japan Localization forms. This license module is always assigned the session type Full client.

SyteLineMobile Module

Request this module for users who want to receive alerts and access SyteLine from their mobile devices. This license module is always assigned the session type Web form only. Each mobile user is assigned a mobile default home page (small SyteLine form) that displays when the user logs in from a mobile device.

SyteLineMobile license prices are calculated on a per user basis.

SyteLineMobileMultisite Module

For SyteLine Mobile, this module is similar to the SyteLineTransMultiSite module, in that you need a SyteLineMobile license for each mobile device used in its "home" site, and a SyteLineMobileMultisite license for each other site where that mobile device might be used. This license module is always assigned the session type Web form only.

SyteLineMobileMultisite license prices are calculated on a per user basis.

SyteLineOfficeIntegration Module

This module allows you to display custom SyteLine forms inside Microsoft Office modules. For example, if you have this license, and if the SyteLine Outlook add-in is enabled, you can view the Sales Contacts (Office) form from the Contacts tab of Microsoft Outlook.

You license SyteLineOfficeIntegration per user, per site. You will need as many SyteLineOfficeIntegration licenses as you have transactional users plus CRM users in each site.

This license module is always assigned the session type Web form only.

SyteLineMX Module

Use this license module to allow users to open the Mexico Localization forms. This license module is always assigned the session type Full client.

SyteLinePortals Module

Request this named license module for your customers who you want to allow to access SyteLine IDOs through a SharePoint portal. This license module is always assigned the session type **IDO**. Each portal user must have a user ID assigned in SyteLine. The administrator must map that user ID to the customer number, so that predefined row-level authorizations will prevent the customers from seeing anything beyond their own data. User creation and mapping is done through the portal User Account Management utility. When business-to-customer (B2C) portal users create their own login accounts, the SyteLine user IDs and customer numbers are assigned automatically.

SyteLinePortal license prices are calculated on a per user basis.

Note: For both SyteLinePortals and SyteLinePortals_MS users, verify that your Microsoft Server, Microsoft SQL Server and Microsoft SharePoint licenses are correct for the type of user and data you are planning to expose.

SyteLinePortals_MS Module

For the SyteLine Portal, this module is similar to the SyteLineTransMultiSite module, in that you need a SyteLinePortals license for each portal user ID that is assigned to the primary site (that is, the site in which orders are entered), and a SyteLinePortals_MS license for any other site that is exposed on the portal. The user needs a SyteLinePortals_MS license to access data from the other sites.

If users are shared through the Intranet Shared User Tables form (which requires Intranet Licensing to be turned on), then you do not need to specify a SyteLinePortals_MS license for the user; you only need to specify the SyteLinePortals license for the user at the master site. In this case, the master site *must* be the primary site.

When business-to-customer (B2C) users create their own portal accounts, the appropriate SyteLinePortals and SyteLinePortals_MS licenses are automatically assigned to the new account.

SyteLinePortals_MS license prices are calculated on a per user basis. This license module is always assigned the session type IDO.

SyteLinePP Module

Use this license module to allow users to open the Printing Industry Pack forms and to see and use fields and buttons on other forms that are specific to the Printing Industry Pack. This license module is always assigned the session type Full client.

SyteLineRFQ Module

Use this license module to allow users to use RFQ forms to request a quotation from a supplier. You can record responses about lead time, quote quantities, and price breaks for each RFQ. RFQs can be tied to any Requisition Line Item, which can be cross-referenced from different sources in SyteLine. This module is separately installed and is always assigned the session type Full client.

SyteLineTax Module

Use this license module to allow users to open the Tax Interface forms and to see and use fields and buttons on other forms that are specific to the Tax Interface. This license module is always assigned the session type Full client.

SyteLineTH Module

Use this license module to allow users to open the Thailand Localization forms. This license module is always assigned the session type Full client.

SyteLineWB Module

Use this license module to allow users to open the Workbenches forms and to see and use fields and buttons on other forms that are specific to the Workbenches. This license module is always assigned the session type Full client.

SLSITrans Licensing

The license module SLSITrans is used to access all of the forms in the Infor SyteLine Enterprise Financials interface. This license module is always assigned the session type Full client. Note that this interface has a separate App and Forms database, as well as a separate user interface. The Enterprise Financials database is specified in the licensing. For example, your database server might have databases like these:

MyDBServer
    SLSite1_App
    SLSite2_App
    SLSI_App

The system generates three different license documents, with the correct database server and database names provided: one for each SyteLine site, and another one for the interface application.

QCS_Customer

Allows access to QCS forms, which let you track quality information for items being shipped to and returned from customers. This module is separately installed and is always assigned the session type Full client.

QCS_Enterprise

Allows access to QCS forms, which let youtrack quality information for business enterprise activities that are not directly linked to an item. In order for a First Article receiver to be created, both QCS_Enterprise and QCS Supplier must be installed and licensed.

This module is separately installed and is always assigned the session type Full client.

QCS_In_Process

Allows access to QCS forms, which let you track quality information for manufactured items. This module is separately installed and is always assigned the session type Full client.

QCS_Supplier

Allows access to QCS forms, which let you track quality information for purchased items. This module is separately installed and is always assigned the session type Full client.

Infor BI for SyteLine Licensing

If you plan to use Infor BI for SyteLine, you must have the BI platform and ImportMaster licenses.

Licensing Custom Forms and IDOs

If you add custom forms, copy/extend existing forms, create new IDOs, or extend existing IDOs, they are licensed using the following information in the license document and the ModuleMembers table:

● New custom IDOs that do not extend other IDOs are automatically assigned to the CustomerIDOs internal module member and associated with the SyteLineAutomation license module.

● *Imported or extended* IDOs are automatically assigned to the CopiedExtendedIDOs internal module member and associated with the license module(s) of the base IDO which it extends. If the base IDO belongs to more than one license module, then a CopiedExtendedIDOs ModuleMember record will be created for each license module to which the base IDO belonged.

● *New* custom forms are automatically assigned to the CustomerForms internal module member and associated with the SyteLineTrans, SyteLineTransMultiSite SyteLineMobile, and SyteLineMobileMultisite license documents.

● *Copied* forms (which belong to the CopiedForms internal module member) inherit the license module assignments of the source form from which they were copied. Thus, if you copied the CustomerOrders form to some new name (and changed it for your purposes), it would belong to all the same license modules the original CustomerOrders form belonged to.

● A new form that extends an existing form is automatically assigned to the license modules to which the existing form belonged.

 Be aware that, if you have multiple application databases pointing to the same forms database, you must copy the form licensing information to each application database, using FormSync.

Licensing for Automation Sessions

Multi-session users are defined in your license document and are created when the license document is applied. Currently the only available multi-session user in a named user environment is the SL_Internal user. The SL_Internal user is designed for automation sessions where multiple threads of the calling application may overlap. For example, a web application can call the SyteLine IDOWebService to query data to present. When making a call to the IDO Web Service, the web

application supplies a specific user ID, password, and configuration. The web application can have multiple threads executing simultaneously, so it requires multiple concurrent SyteLine sessions.

Automation sessions can be established using the following technologies and Office productivity tools. Each of these options exposes the same underlying IDO Request interface, as described in the document *Integrating IDOs with External Applications*. The licensing implications of these options vary, as described here:

- SOAP WebService - These calls are synchronous, consuming a license token during the processing.
- COM - These calls are synchronous, consuming a license token during the processing.
- XML - SyteLine utility/web servers provide both synchronous and asynchronous URLs. The calling process must format an IDORequest XML document, and then decide whether to use the synchronous route or asynchronous route:
  - For the synchronous route, an automation session is established for the user specified in the XML, consuming a license that is assigned to that user. (Often this user is assigned a SyteLineAutomation license, because SyteLineAutomation is the only license module that contains all the SyteLine IDOs plus customer-created ones.) The synchronous route allows the calling application to receive the results of the request.
  - For the asynchronous route, although security is checked for the user specified in the XML, no licensing consumption occurs. The processing is performed by the framework service ReplQListener. XMLs processed this way require a valid user, but that user does not need to take licensing into account, only security.
- SharePoint IDO WebParts - You configure your SharePoint site with a SyteLine user, password, and configuration. This user must be assigned the SyteLineAutomation license module. Since connections are short-lived, you may be able to be able to use a standard user you create for this purpose. For higher levels of usage where sessions can overlap, you can use the SL_Internal multi-session user.
- Microsoft Outlook or Project add-in - Each user configures the add-in in Outlook or Project with a SyteLine user, password, and configuration. This user must be assigned the SyteLineAutomation license module and must be assigned the appropriate IDO permissions in SyteLine, as described in the *Infor SyteLine Microsoft Office Integration User Guide.* Connections to SyteLine to synchronize data are short-lived. In addition, the SyteLineOfficeIntegration license is needed if the user plans to include custom SyteLine forms inside Microsoft Office modules.
- Excel add-in - If you use the drill-down functionality and choose to have the data displayed in a SyteLine form, and a separate SyteLine session is open at the same time, you must have a multi-session license. If you do not have a multi-session license, you can still operate in this scenario if you have two user IDs, one for SyteLine and the other to use in the drilldown from Excel.

Multi-Site Licensing Example

An example of a multi-site environment and the appropriate licenses is provided below. This example consists of:

- An environment with 2 sites (Site A and Site B) and one entity, all in separate application databases

- 20 Transaction users, 10 at Site A and 10 at Site B
- 5 Inquiry users, 3 at Site A and 2 at Site B
- 5 Multi-Site Transaction users from Site A with access to Site B
- 4 Multi-Site Transaction users from Site B with access to Site A
- 3 Entity users with access to the Entity database

Licensed Module	Site A	Site B	Entity
SyteLineTrans	10	10	0
SyteLineInquiry	3	2	0
SyteLineEntity	0	0	3
SyteLineTransMultiSite	4	5	0

These users would each have a User record and would be associated with the appropriate modules for access to the licensed applications. The individual licenses could be set up as follows:

Site & Users	License Types			
	Trans	Inquiry	Entity	Trans MS
Site A Users				
Transaction users (users # 1-10)	X			
Multi-Site Transaction users (users # 1-4)				X
Inquiry users (Inquiry users # 1-5)		X		
Site B Users				
Transaction users (users # 1-10)	X			
Multi-Site Transaction users (users # 6-10)				
Inquiry users (Inquiry users # 1-2)		X		
Entity Users				
Entity users (Entity users # 1-3)			X	

Portal Customizations

You can customize the Customer and Vendor portals by modifying standard scripting delivered with our Web Parts or by creating new scripting for new or existing Web Parts. If you plan to create new

scripts, you must have at least one SyteLine Developer License. If you do not have this license, your new scripts will not function properly in the portals.

Crystal Reports Licensing

Previous versions of SyteLine included a Crystal Reports OEM license key consisting of five Concurrent Processing Licenses (CPL). This allows you to run five instances of report executions simultaneously. If you used a previous version of SyteLine and you plan to continue to use any custom Crystal reports that you have created, those reports were written with tools you already own and the existing licensing still applies. Crystal Reports 2008 and prior versions are still supported for backward compatibility with any custom reports you might have in your system.

Microsoft SSRS Licensing

If you install SSRS on a SQL database server, no additional SSRS licensing is required. If you install SSRS on a different server, you must have an additional Microsoft SQL license for that server.

Licensing Demo and Pilot Databases

You can request license keys for demo or pilot databases from Infor Customer Service, using the standard request form.

Demo Database Licensing

Each demo database requires a license key specific to the database and the server on which the database resides. Thus, there is no way to provide a generic license to enable the use of the demo database by more than one person.

These restrictions and notes apply to Demo Database license keys:

- Licenses are valid for 90 days.
- There is a fixed user count of 10 for any user-based module.
- All products managed by the license key generation are available.
- The names of the databases are fixed at demo01 - demo10.
- In the Customer Service form, you must include your SQL Server ID and App Database (demo1 - demo10).

Pilot Database Licensing

So that you can make copies of your production systems for piloting, testing or development work, you can ask Customer Service to generate a new production database license key based on the old production key, with the following constraints:

- The licenses that are created are valid indefinitely.
- The database name of the pilot database must be the same name as the production database with a "_plt1", "_plt2" or "_plt3" appended to the end of the name.
- The number of users allowed for user-based modules is limited to 10 users, or 20 percent of the production database license count, whichever is greater.

How to Request a License

First, review the information in this guide and decide what types of licenses and how many of each license you need. Then use this worksheet to fill in the information that Infor requires in order to generate your license document. If you are performing a multi-site implementation, we recommend that you also read the *Multi-Site Planning Guide* before you request your licenses.

Fill Out the License Worksheet

Make a copy of this table, which includes the fields that display on the online request form (described later), and fill in the appropriate information for each license you need to request. You will need to request one license per database server.

General Information	Your Answer	Notes
License Type		Specify either: ● Infor SyteLine 9.0 Concurrent or ● Infor SyteLine 9.0 Named
Support ID		Online form supplies this information automatically
Customer Name		Online form supplies this information automatically
Customer Region		Specify one of these: ● Americas ● Europe, Middle East and Africa ● Asia Pacific ANZ

General Information	Your Answer	Notes
Contact Name		Specify the name of the person that Infor should contact if we have questions
Contact Email		Specify the e-mail address of the person that Infor should contact if we have questions

Database Information	Your Answer	Notes
SQL Server ID		Specify the SQL Server instance ID. This is case-sensitive and must exactly match your server ID. For Cloud users, this information is supplied by the Cloud administrator.
App Database Name		Specify the SyteLine application database name to which this license will be applied. This is case-sensitive and must exactly match your database name. For Cloud users, this information is supplied by the Cloud administrator.
DB Type		This is always set to Site. (An entity is a type of site, not a database type.)
Temporary Key		Specify whether this is a temporary key (**Yes** or **No**). Temporary keys are generally used for testing purposes.

User Licenses	Specify the number of each type of license you want	Notes
SyteLine Automation		SyteLineAutomation
SyteLine CRM		SyteLineCRM
Entity Users		SyteLineEntity
Field Service		SyteLineFSP
Field Service Multi Site		SyteLineFSP_MS
Field Service Data Collection		SyteLineFSP_DC
Inquiry Users		SyteLineInquiry
LABR-TRAK ADMIN		See LABR-TRAK documentation

User Licenses	Specify the number of each type of license you want	Notes
LABR-TRAK Multi Site		See LABR-TRAK documentation
Plant Maintenance		SyteLineFSPM
Plant Maintenance Multi Site		SyteLineFSPM_MS
SyteLine Developer		SyteLineDev
SyteLine ERP Transaction Users		SyteLineTrans
SyteLine ERP Transaction Multi-Site Users		SyteLineTransMultiSite
SyteLine Mobile		SyteLineMobile
SyteLine Mobile Multi Site		SyteLineMobileMultiSite
SyteLine Office Integration		SyteLineOfficeIntegration. User count should equal the total of Transaction + CRM users
SyteLine Portals		SyteLinePortals
SyteLine Portals Multi Site		SyteLinePortals_MS
SyteLine SI Trans		SunSystems integration

Module Licenses	Specify the number of each type of license you want	Notes
Advanced Planning & Scheduling		SyteLineAPS
Configuration		SyteLineConfig
Configurator/ BuyDesign		See BuyDesign documentation
Credit Card Interface		SyteLineCCI
China Localization		SyteLineCN
DOC-TRAK		See DOC-TRAK documentation
EDI		SyteLineEDI
FASView		SyteLineATT
Forecasting		See BTA documentation
Instant Order Fulfillment		SyteLineIOF

Module Licenses	Specify the number of each type of license you want	Notes
Japan Localization		SyteLineJP
Mexico Localization		SyteLineMX
Printing Industry Pack		SyteLinePP
QCS Customer		QCS_Customer
QCS Enterprise		QCS_Enterprise
QCS IN PROCESS		QCS_In_Process
QCS SUPPLIER		QCS_Supplier
Request for quote		SyteLineRFQ
RSVP Universal Shipping System		See RSVP documentation
SytePlan		See BTA documentation
Tax Interface		SyteLineTax
Thailand Localization		SyteLineTH
Work Benches		SyteLineWB

Notes Area	Your Notes	Description
Notes		To request license modules that do not display on this form, add a note specifying the license modules you want to include.

Request the License on Infor Xtreme Support

After you have filled in the license worksheet(s), log in to Infor Xtreme Support (http://www.infor.com/inforxtreme) and follow these steps to request a license:

1 From the Support Resources menu, select **Request a Software Key.**

2 Select **Infor SyteLine 9 License Request**.

3 Fill in the fields with the values from your worksheet and click **Submit**.

4 License keys are emailed to you in 4 to 6 business days.

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