# Infor CloudSuite Industrial Licensing

Infor CloudSuite 9.00.x

# Contents

# Chapter 1: Infor CloudSuite Industrial Licensing

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**Note:** This document applies to Infor CloudSuite Industrial 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 Infor CloudSuite.

## 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 CloudSuite Industrial includes these license modules:

| Module | Access Capabilities | Session Type |
|---|---|---|
| EmployeeSelfService | Allows you to use the Employee Self Service IDOs and forms in the web client | Full client, Web form only |
| 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 |

| Module | Access Capabilities | Session Type |
|--------|---------------------|--------------|
| 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 |
| 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 Infor CloudSuite | 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 Infor CloudSuite 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 |
| SyteLineMO | Allows access to all Molding Pack forms and related fields and buttons on other forms. | Full client |
| SyteLineMobile | Allows access to all forms that are used by a mobile device | Web form only |

| Module | Access Capabilities | Session Type |
|---|---|---|
| SyteLineMobile_MS | 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 Infor CloudSuite forms such as the Sales Contacts (Office) form from inside Microsoft Office | Web form only |
| 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 Infor CloudSuite forms. | Full client |
| SyteLineTransMultiSite | Allows access to all standard Infor CloudSuite 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 CloudSuite Industrial 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 |

| Module | Access Capabilities | Session Type |
|---|---|---|
| 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 Infor CloudSuite 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 Infor CloudSuite

License administration is performed using these Infor CloudSuite 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 Infor CloudSuite features of optional modules for a site, after the modules are licensed. See "Licensing and Enabling Optional Modules" on page 12.

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, Infor CloudSuite 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 Infor CloudSuite, you would request three Infor CloudSuite named licenses.

Named license users are only allowed one active login to an Infor CloudSuite 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, Infor CloudSuite 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 9.

With named user licensing, when you associate a user with a license module, Infor CloudSuite 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, Infor CloudSuite 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 Infor CloudSuite licenses, you could assign that license to three users (bobw, jeanp, and miker). However, only two of them could use the Infor CloudSuite license token at a time. The reverse is also true - for example, miker is assigned concurrent licenses for Infor CloudSuite 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 Infor CloudSuite 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, Infor CloudSuite 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 11. 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 11.)

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 Infor CloudSuite 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

Infor CloudSuite 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 Infor CloudSuite Microsoft add-in or through an Infor CloudSuite portal, it is an "IDO" session, because they access Infor CloudSuite 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 Infor CloudSuite Explorer are installed automatically with Infor CloudSuite. 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 Infor CloudSuite) 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 Infor CloudSuite forms, or back-end Infor CloudSuite 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 Infor CloudSuite 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 Infor CloudSuite 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 Infor CloudSuite 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 Infor CloudSuite. (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 |

# EmployeeSelfService Module

Use this license module to allow users to open the Employee Self Service forms, and use associated IDOs, in the web client. This license module is always assigned the session types Full client and Web Form Only. The forms in this module are designed for use in the Web client (web form only mode); however, full client access is available for use when you want to customize these forms.

# SyteLineAPS Module

You license Infor CloudSuite 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 Infor CloudSuite users. Standard Infor CloudSuite 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 Infor CloudSuite through the IDO layer.If you have an Infor application such as APS that is connecting to Infor CloudSuite, you do not need an additional Infor CloudSuite Automation license.

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

If you plan to have custom applications connecting to Infor CloudSuite 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.

# 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 Infor CloudSuite. The license provides access to certain Infor CloudSuite 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 Infor CloudSuite 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 Infor CloudSuite 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 Infor CloudSuite 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 Infor CloudSuite 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 Infor CloudSuite 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.

# SyteLineMO Module

Use this license module to allow users to open the Molding Industry Pack forms and to see and use fields and buttons on other forms that are specific to the Molding Industry Pack. 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 Infor CloudSuite 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 Infor CloudSuite form) that displays when the user logs in from a mobile device.

SyteLineMobile license prices are calculated on a per user basis.

# SyteLineMobile_MS Module

For Infor CloudSuite 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 SyteLineMobile_MS license for each other site where that mobile device might be used. This license module is always assigned the session type Web form only.

SyteLineMobile_MS license prices are calculated on a per user basis.

# SyteLineOfficeIntegration Module

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

You license Infor CloudSuiteOfficeIntegration per user, per site. You will need as many Infor CloudSuiteOfficeIntegration 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 Infor CloudSuite 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 Infor CloudSuite. 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 Infor CloudSuite 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 Infor CloudSuite 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 Infor CloudSuite. 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 CloudSuite Industrial 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 Infor CloudSuite 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 Infor CloudSuite Licensing

If you plan to use Infor BI for Infor CloudSuite, 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 SyteLineMobile_MS 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 Infor CloudSuite 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 Infor CloudSuite 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 - Infor CloudSuite 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 Infor CloudSuite 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 an Infor CloudSuite 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 an Infor CloudSuite user, password, and configuration. This user must be assigned the SyteLineAutomation license module and must be assigned the appropriate IDO permissions in Infor CloudSuite, as described in the *Infor CloudSuite Industrial Microsoft Office Integration User Guide.* Connections to Infor CloudSuite to synchronize data are short-lived. In addition, the

SyteLineOfficeIntegration license is needed if the user plans to include custom Infor CloudSuite forms inside Microsoft Office modules.

● Excel add-in - If you use the drill-down functionality and choose to have the data displayed in an Infor CloudSuite form, and a separate Infor CloudSuite 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 Infor CloudSuite 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 | | | | |

| Site & Users | License Types | | | |
| --- | --- | --- | --- | --- |
| | **Trans** | **Inquiry** | **Entity** | **Trans MS** |
| 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 Infor CloudSuite 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 Infor CloudSuite 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 Infor CloudSuite 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

Demo and pilot databases must be licensed and must meet the requirements in the Infor Non-Production Server Licensing Policy. Contact your Infor representative for a copy of this policy.

You can request license keys for demo or pilot databases through Infor Xtreme, using the Key Request link. See "Request the License on Infor Xtreme Support" on page 28.

## 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 Key Request, you must include your Server Name and Host Name (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 and fill in the appropriate information for each license key you need to request. You will need to request one license key per database server.

| User Licenses | Specify the number of each type of license you want | Notes |
|---|---|---|
| Additional Automation | | SyteLineAutomation |
| Country Pack China | | SyteLineCN |
| Country Pack Japan | | SyteLineJP |
| Country Pack Mexico | | SyteLineMX |
| Country Pack Thailand | | SyteLineTH |
| Credit Card Interface | | SyteLineCCI |
| CRM | | SyteLineCRM |
| CRM Multi Site | | SyteLineCRM_MS |
| Developer User | | SyteLineDev |
| Entity Users | | SyteLineEntity |
| Inquiry Users | | SyteLineInquiry |
| Mobile | | SyteLineMobile |
| Mobile Multi Site | | SyteLineMobile_MS |
| Office Integration | | SyteLineOfficeIntegration. User count should equal the total of Transaction + CRM users |
| Plant Maintenance | | SyteLineFSPM |
| Plant Maintenance Multi Site | | SyteLineFSPM_MS |
| Portals | | SyteLinePortals |
| Portals Multi Site | | SyteLinePortals_MS |
| Service | | SyteLineFSP |
| Service Multi Site | | SyteLineFSP_MS |
| Service Data Collection | | SyteLineFSP_DC |
| Shop-Trak Admin | | See Shop-Trak documentation |
| Shop-Trak Admin Multi Site | | See Shop-Trakdocumentation |
| Sun Interface | | SunSystems integration |
| Transaction Users | | SyteLineTrans |
| Transaction Users Multi Site | | SyteLineTransMultiSite |

| Module Licenses | Specify the number of each type of license you want | Notes |
|---|---|---|
| APS Transaction User | | SyteLineAPS |
| Configuration | | SyteLineConfig |
| Doc-Trak | | See DOC-TRAK documentation |
| FASView | | SyteLineATT |
| Forecasting | | See BTA documentation |
| Industry Pack Molding | | SyteLineMO |
| Industry Pack Printing | | SyteLinePP |
| Quality Customer | | QCS_Customer |
| Quality Enterprise | | QCS_Enterprise |
| Quality In-Process | | QCS_In_Process |
| Quality Supplier | | QCS_Supplier |
| Request for quote | | SyteLineRFQ |
| SytePlan | | See BTA documentation |
| Tax Interface | | SyteLineTax |
| Workbench Suite | | SyteLineWB |

| Environment Information | Your Answer | Notes |
|---|---|---|
| Host Name | | Specify the 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. |
| Server Name | | 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. |

| Additional Information | Your Notes | Description |
|---|---|---|
| | | To request license modules that do not display on the request form, add a note specifying the license modules you want to include and the number of users. |
| | | Specify "**multi-site**" here if you want to include a matching number of multi-site licenses for each module that has a multi-site option. For example, if you specify 50 users for SyteLineTrans, you will also get 50 users for SyteLineTransMultiSite. |
| | | If you only want multi-site users for a certain module, or if you want a different number of multi-site users than regular users for a module, specify that information here. |
| | | **Note:** Multi-site licenses can only be assigned to named users. |
| | | Specify "**configuration**" here if you want to include a PCM Configurator license. |

## 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 > Key Request**.

2    Click **Browse** and specify your customer ID.

3    Select your product line (**CloudSuite, Business or Industrial**).

4    Specify the **Key Request Reason**: whether the license key is **Permanent** or **Temporary**. Temporary keys are generally used for testing purposes. Demonstration/evaluation is intended only for sales purposes.

5    Specify the rest of your contact information and click **Next**.

6    Specify the license **Key Length** (number of months, 1 year, or **Permanent**) and the **Key Start Date** if different from the current date.

7    The form lists the modules you are entitled to, based on the SKU. Use the information from your User Licenses and Module Licenses worksheets (above) to select the modules and specify the user count for each module. To include a module in the license key, change **No Key Required** to **Yes, Key Required**. Confirm the release number.

If all modules require renewal, you can use the **Select All Keys** option. The user count and release version must be confirmed.

**Note:** The form does not list multi-site modules. See the Additional Information worksheet for information on specifying multi-site users.

8   Click **Next** and specify environment details from your Environment Information worksheet (above). These details are used to generate your key, so please ensure that they reflect the environment where you will install the new key.

9   In the **Additional Information** field, provide any clarification on your request that you believe is important. For example, you can specify requests for multi-site users or Configuration licenses here. See the Additional Information worksheet (above).

If you want to attach a file with some relevant information, click **Attach** and follow the instructions to upload the file.

10   Carefully review the information before you click **Submit**.

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