



Infor ERP SyteLine

Licensing

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Infor ERP SyteLine Licensing

NOTE: This document applies to Infor ERP SyteLine 8.02.10 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 ERP 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 site. 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 ERP SyteLine includes these license modules:

Module	Access Capabilities	Session Type
SyteLineAPS	APS Mode form to enable APS	Full client
SyteLineConfig	Allows you to run BuyDesign and access forms and fields relating to that product	Full client
SyteLineCRM	Allows users to enter CRM information, including estimates and orders, in SyteLine. This license can also be used by SyteLine customers who run Epiphany CRM	Full client
SyteLineDev	Maintenance forms used for development of IDOs and for customization of SQL tables and columns.	Full client
SyteLineEntity	All G/L Entity forms (functions); some administrative forms such as the replication rules	Full client
SyteLineInquiry	All Query forms, all Report Options forms, and Item Availability. (Not available to new customers)	Full client
SyteLineTrans	All standard SyteLine forms	Full client
SyteLineTransMultiSite	The SytelineTransMultiSite module is 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 ERP SyteLine Enterprise Financials interface database and forms	Full client
SyteLineAutomation	IDO Access, Microsoft Outlook integration, Microsoft Project integration	IDO
SyteLineDC	No SyteLine forms; only IDO access for data collection transactions	IDO
SyteLineDC_MS	The SyteLineDC_MS module is for data collection users who require access to multiple sites. Assign a SyteLineDC license in the "home" site and a SyteLineDC_MS license in any other sites where access is required	IDO
SyteLinePortals	All IDOs that are accessed by your customer or vendor using a SharePoint portal	IDO
SyteLinePortals_MS	All IDOs that are accessed by your customer or vendor using a SharePoint portal in a multi-site environment	IDO
SyteLineMobile	All forms that are accessed by a mobile device	Web form only
SyteLineMobileMultisite	All forms that are accessed by a mobile device in a multi-site environment	Web form only

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 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 7).
- 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.

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 Infor ERP SyteLine, you would request three Infor ERP SyteLine named licenses.

Named license users are only allowed one active login to SyteLine. If you try to log in a subsequent time as a named user who still holds an active session, SyteLine will require 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 7.

With named user licensing, when you associate a user with a license module, Infor ERP 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.

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 in with a particular license module is equal to the license number limit, and another user tries to log in, the system does not allow that user to log in. Using our example above, if you had two concurrent Infor ERP 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 Infor ERP SyteLine and SyteLineDC - so he could be working in both functional areas while he is logged in.

Under concurrent licenses, a user can log in 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. (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 7.)

With concurrent login licensing, you can associate as many users as you want with a module, 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.

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. 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.

If you have a Data Collection license, you get one additional SL_Internal user session, because Data Collection requires the SL_Internal user.

When the SL_Internal user is assigned to a license module, the tokens consumed are the number of concurrent session 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 limit are defined in the license document generated by the vendor. You cannot create or modify a user to be a multi-session user.

Licensing by Session Type

Infor ERP 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 customer 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").

We have associated one of the following session types with each license module, as indicated in the chart on page 4:

- **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. Intranet licensing does not apply to any *entities* on the intranet. Each entity must be licensed separately, using a SyteLineEntity license.

You can use the Intranet Shared User Tables feature to create and administer all users for the intranet from the master site. If you do not use this 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, in order to use Intranet Licensing. A named user can only be logged into one participating site on the intranet.

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.

Once 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.

More About the License Modules

SyteLineTrans Module

Most users will be assigned a **SyteLineTrans** license, which provides access to most forms in Infor ERP 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 multi-site users because it costs less but has the same functionality as the SyteLineTrans license. If 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 are named user licenses.

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 Infinite 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.

SyteLineAutomation Module

This license allows other applications to connect to Infor ERP 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 50% of the number of SyteLineTrans licenses your company buys. For example, if your company buys 100 SyteLineTrans licenses, you can request up to 50 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 14.

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 also allows Epiphany CRM users to enter orders and estimates in SyteLine. The Epiphany CRM license type will be the same as the Infor ERP SyteLine and SyteLine CRM license type. For each Epiphany CRM license, you receive one SyteLine CRM license. This license module is always assigned the session type **Full client**.

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

SyteLineDC Module

Request licenses for each site where Data Collection will be used. You need a SyteLineDC license for each data collection *device* used within that site. This license is *not* based on the number of users. This license module is always assigned the session type **IDO**.

Infor only supports single session access to web-based Data Collection. If you try to use the same user ID for more than one session in web-based data collection, you might be able to log on, but errors will occur when you navigate between fields and transactions are committed to the database. Data entered will be lost.

SyteLineDC_MS Module

For Data Collection, this module is similar to the SyteLineTransMultiSite module, in that you need a SyteLineDC license for each data collection device used in its "home" site, and a SyteLineDC_MS license for each other site where that data collection device might be used. This license module is always assigned the session type **IDO**.

SyteLineDC_MS licenses are named user licenses.

SyteLineDevModule

Request licenses for each site where development of IDOs or customization of SQL tables will be performed. This module allows the use of SyteLine forms that start with the prefix "IDO" or "SQL" that are used for custom development. This license module is always assigned the session type **Full client**.

SyteLineEntity Module

This license module should be applied to each entity database. It 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 an entity database, 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**.

When you request licensing for an entity database, you are only allowed to select SyteLineEntity licenses (SyteLineAutomation is included automatically). Other license modules are not allowed for an entity.

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.

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 licenses are named user licenses.

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 licenses are named user licenses.

SyteLinePortals Module

Request this license module for your customers who you want to allow to access SyteLine IDOs through a SharePoint customer 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.

SyteLinePortal licenses are named user licenses.

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 assigned to the "home site" (that is, the site to which the user generally connects via a portal URL), and a SyteLinePortals_MS license for any other site to which that portal user might log in via a portal URL.

SyteLinePortal_MS licenses are named user licenses. This license module is always assigned the session type **IDO**.

SLSITrans Licensing

The license module SLSITrans is used to access all of the forms in the Infor ERP 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.

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 assigned to the CustomerIDOs internal module member and associated with the SyteLineAutomation license module.
- *Imported or extended* IDOs will be 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 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.

For more information, see the section on custom form/IDO licensing in *Modifying Infor ERP SyteLine*. 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 ReplQLListener. 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 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.
- 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 appropriate integration guide. Connections to SyteLine to synchronize data are short-lived.
- Excel add-in - The Excel add-in has two connection modes; a direct connection, and connection via IDO Web Service. The direct connection has no licensing implications. Users connecting via the IDO Web Service must be assigned the SyteLineAutomation license module and the appropriate IDO permissions in SyteLine, as described in the *Excel-Based Toolset for Financial Reporting Guide*.
- Web-based Inbox application - If a user accesses the Web-based Inbox application, the session is a standard IDO automation session, and the user must be assigned an IDO SessionType license module such as SyteLineAutomation.

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.
- 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
- 10 Data Collection users, 5 at Site A and 5 at Site B

Licensed Module	Site A	Site B	Entity
SyteLineTrans	10	10	0
SyteLineInquiry	3	2	0
SyteLineDC	5	5	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	DC	Entity	TransMS
Site A Users					
Transaction users (users # 1-10)	X				
Multi-Site Transaction users (users # 1-4)					X
Data Collection users (DC users # 1-5)			X		
Inquiry users (Inquiry users # 1-5)		X			
Site B Users					
Transaction users (users # 1-10)	X				
Multi-Site Transaction users (users # 6-10)					
Data Collection users (DC users # 1-4)			X		
Inquiry users (Inquiry users # 1-2)		X			
Entity Users					
Entity users (Entity users # 1-3)				X	

Crystal Reports Licensing

When you purchase Infor ERP SyteLine, it includes a Crystal Reports OEM license key consisting of five Concurrent Processing Licenses (CPL). This allows you to run five instances of report executions simultaneously. At first glance, this may not seem sufficient for a multi-user system.

However, each time Infor ERP SyteLine uses RunReport to execute a Crystal Report, the request execution places the request into an internal queue. Then, according to the number of concurrent processes allowed by the CPL, the Crystal Reports runtime processes the execution requests in the queue. There are a predefined number of attempts to process queued requests before failing the request; at that point the Crystal Reports runtime notifies RunReport about the failed API execution due to licensing.

Within Infor ERP SyteLine, RunReport handles the preprocessing before actually executing the report:

- Loads the requested Crystal Reports file.
- Sets logon information for the requested report and subreports, if any.
- Substitutes string objects in formula, if any.
- Prepares report parameter values.

The actual report execution is usually short-lived, so it is rare for Crystal Reports to run out of CPL. This is only likely to happen if you run many long-running reports at once. We believe that the current license agreement will suffice in most cases. If your use of reports increases so that you start receiving exception errors relating to licensing, you may want to set the Maximum Concurrent Tasks (on the Intranets form, for all tasks, or on the Background Task Definition form, for specific tasks) to limit the number of report requests that can run at one time. If that does not solve the problem, contact Infor support.

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.

The following 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, App Database (demo1 - demo10) and Database Type (entity or site).

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: <ul style="list-style-type: none"> ■ Infor ERP SyteLine 8.0 Concurrent or ■ Infor ERP SyteLine 8.0 Named
Support ID		Online form supplies this information automatically
Customer Name		Online form supplies this information automatically
Customer Region		Specify one of these: <ul style="list-style-type: none"> ■ Americas ■ Europe, Middle East and Africa ■ Asia Pacific ANZ
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.
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.
DB Type		Specify whether this application database is a site or an entity database.
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
Transaction Users		SyteLineTrans
Inquiry Users		SyteLineInquiry
ERP Multi Site		SyteLineTransMultiSite
Data Collection Users		SyteLineDC
Data Collection Users Multi Site		SyteLineDC_MS
Entity Users		SyteLineEntity
Field Service Plus		See Field Service documentation
Field Service Plus Multi Site		See Field Service documentation
Field Service Plus Data Collection		See Field Service documentation
LABR-TRAK ADMIN		See LABR-TRAK documentation
LABR-TRAK Multi Site		See LABR-TRAK documentation
SL8 Developer		SyteLineDev

Module Licenses	Specify the number of each type of license you want	Notes
Advanced Planning & Scheduling		SyteLineAPS
Configuration		SyteLineConfig
Configurator/ BuyDesign		See BuyDesign documentation
DOC-TRAK		See DOC-TRAK documentation
EDI		SyteLineEDI
Forecasting		See BTA documentation
Plant Maintenance		See Single Source documentation
QCS Customer		See RSVP documentation
QCS Enterprise		See RSVP documentation
QCS IN PROCESS		See RSVP documentation
QCS SUPPLIER		See RSVP documentation
Request for quote		See Single Source documentation
RSVP Universal Shipping System		See RSVP documentation
Single Source FASView		See Single Source documentation
Single Source Instant Order Fulfillment		See Single Source documentation
Single Source Outside Process Management		See Single Source documentation
Single Source Point of Sale		See Single Source documentation
Single Source RMA Extension		See Single Source documentation
Single Source Tax Interface		See Single Source documentation
Work Benches		See Single Source documentation

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 Infor365

After you have filled in the license worksheet(s), log in to Infor365 and follow these steps to request a license:

1. From the Resources menu in the left pane, select **Request a software license key**.
2. On the next page, select **Infor ERP SyteLine 7 and 8 License Request**.
3. Fill in the fields with the values from your worksheet and click **Submit**.
4. License keys are e-mailed to you in 4 to 6 business days.

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