IRIS Exchequer Annual Licensing Notes

Document History

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Version** | **Status** | **Author** | **Description** | **Date** |
| 1.0 | Issued | M Higginson | Initial Version | 11/02/2009 |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

Distribution List

|  |
| --- |
| **Name** |
| Mark Roke Exchequer Product Manager |
| Paul Swift Head of Development |
|  |
|  |
|  |

# Requirement

To modify IRIS Exchequer to support annual licensing with an Annual Release Code followed by a 1 month grace period and then a read-only mode should the user not renew their license.

Fortunately some of this functionality was required for IAO so we already have some elements in place.

This annual licensing system will be for new customers only as our existing user base has a perpetual license so we will need to be able to identify which customers it applies to.

# Software Changes

## CRM

Martin will need some way to identify the type of licence the customer runs so that he can generate the correct licence type.

## Exchequer CD Licence Generator (1.5 Days)

In order for Exchequer to know which license the user has bought we will need to add a flag into the CD Licence File and ripple it through the various utilities, the installer and the Exchequer Licence File.

There is currently plenty of spare in the CD and Exchequer Licences to support a new Licence Type flag, it should be defined so that the existing licences default to a perpetual licence (0=Perpetual,1=Annual).

Whenever an upgrade is run the Licence Type in the Exchequer Licence will be overwritten with that from the CD Licence. This means that if we accidentally give out a CD Licence with the wrong licence type or a customer switches from one to another then we simply need to upgrade them with the correct licence.

## Installer – License Text (0.5 Days)

Will we need to show different license agreements for Annual and Perpetual license customers?

## Exchequer (1.75 Days)

### About Dialog (0.25 Days)

The Exchequer About dialog should be modified display the license type and probably should show the number of days remaining in their annual license.

### System Release Code Check (0.25 Days)

The Exchequer Release Code check will need to be modified to handle to 1 month grace period for Annual Licenses. This has already been done for IAO so hopefully we should be able to re-use that mechanism.

### Read-Only Notification (0.25 Days)

There is already a Read-Only notification mechanism in IAO so we should be able to re-use this mechanism.

### Read-Only Mode (1 Day)

There is already a Read-Only mechanism in IAO based on user permissions, we should be able to re-use this mechanism for Exchequer but it will probably need extended to handle the extra functionality in Exchequer.

## External Exchequer Modules

The various external Exchequer modules should also be extended to support Read-Only Mode, this should cover items such as the Importer (refuse to run), the Toolkits (return error on save), OLE (return error on save), eBusiness (prevent creation/editing of transactions), Outlook Dynamic Dashboard (prevent adding/editing of data).

## WebRel

Will this need to be aware of the annual system as well to prevent release codes being given before the customer has paid? If so then there will need to be some link from Accounts to WebRel to control it.