

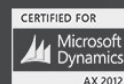


# Annata 365 License Guide

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annata

Management Solutions for the Automotive, Equipment, Rental and Fleet Industries



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## How to license

In order to license the Annata 365 products, the customer must acquire, if not already acquired, the corresponding Microsoft Dynamics 365 license.








The user number of the Annata 365 Finance & Operations (F&O) licenses must at least match the user numbers for Base users, Activity users, Device users and Team Member users of the Microsoft Dynamics 365 Finance & Operations (Finance, SCM and Project Operations) licenses the customer has.

In order to acquire the Annata 365 Finance & Operations, customers must buy the Annata 365 F&O Core license.













The user number of the Annata 365 Customer Engagement (CE) products must at least match the user number of the corresponding Microsoft CE licenses the customer has.

In order to acquire the Annata 365 for Customer Engagement, customers must buy the Annata 365 CE Core license for the relevant CE product.

Annata 365 Finance & Operations licenses available:

Annata 365 Finance & Operations - Core License	
Annata 365 F&O - Core	
 Up to 50 users included	
Annata 365 Finance & Operations – Full access license	
Annata 365 F&O – Full access	
	
Annata 365 Finance & Operations - Additional users	
Annata 365 Activity 	Annata 365 Device 
Annata 365 Team Members 	
Annata 365 Finance & Operations – External users	
Annata 365 Dealer Portal Core	Annata 365 Dealer Portal Add. users
 Up to 300 users included	

Annata 365 for Customer Engagement licenses available:

Annata 365 Customer Engagement - Core License			
<b>Annata 365 Sales - Core</b>  Up to 50 users included	<b>Annata 365 Customer Service - Core</b>  Up to 50 users included	<b>Annata 365 Field Service - Core</b>  Up to 50 users included	<b>Annata 365 Inspection - Core</b>  Up to 50 users included
Annata 365 Customer Engagement – Full access license			
<b>Annata 365 Sales - Full access</b> 	<b>Annata 365 Customer Service – Full access</b> 	<b>Annata 365 Field Service – Full access</b> 	<b>Annata 365 Inspection - Full access</b> 
Annata 365 Customer Engagement – Attach license			
<b>Annata 365 Sales Attach</b> 	<b>Annata 365 Customer Service Attach</b> 	<b>Annata 365 Field Service Attach</b> 	<b>Annata 365 Inspection Attach</b> 



### Example how to license users

The relationship between Annata licenses and Microsoft licenses is at least 1:1. The number of Annata licenses is therefore related to the number of Microsoft Dynamics 365 licenses the customer has (excluding the Attach licenses for Finance, SCM and Project Operations).

#### Customer needing access to Annata 365 for Finance & Operations

The total number of Annata 365 Finance & Operations Full access licenses needed is minimum the total number of Microsoft Dynamics 365 Finance Base, SCM Base, Project Operations Base licenses.

The total number of Annata 365 Activity licenses needed is minimum the total number of Microsoft Dynamics 365 Activity licenses.

The total number of Annata 365 Finance & Operations Device licenses needed is minimum the total number of Microsoft Dynamics 365 Device licenses.

The total number of Annata 365 Finance & Operations Team Member licenses needed is minimum the total number of Microsoft Dynamics 365 Team member licenses.

To license a user, the following license is needed from Annata:

- Annata 365 F&O Core license
  - This Core is needed for all customers regardless of the user count.
- Annata 365 F&O Full access license users
  - If total number of Dynamics 365 SCM, Finance or Project Operations Base users exceeds 50 users, then the customer must buy additional Annata 365 –Full access user licenses.

The user will need any of the below corresponding Microsoft licenses:

- Dynamics 365 Supply Chain Management – Base license OR
- Dynamics 365 Finance – Base license OR
- Dynamics 365 Project Operations OR

Depending on Annata 365 and Dynamics 365 access levels, the customer may acquire the below licenses as well:

- Annata 365 Activity users
- Annata 365 Device users
- Annata 365 Team member users

The user will need any of the below corresponding Microsoft licenses:

- Dynamics 365 Activity users
- Dynamics 365 Device users

- Dynamics 365 Team Member users

The Microsoft license will determine the access each user has to the system. Please refer to the Microsoft Dynamics 365 Licensing Guide for user license access information.

#### Customer needing access to Annata 365 Sales:

In order license a user, the following license is needed from Annata:

- Annata 365 Sales Core license
  - The Core is needed for all customers regardless of the user count.
- Annata 365 Sales Full access license users
  - If total number of Dynamics 365 Sales exceeds 50 users, then the customer must buy additional Annata 365 Sales Full access user licenses.

The user will also need either of the below corresponding Microsoft licenses

- Dynamics 365 Sales – Base license OR
- Dynamics 365 Sales – Attach license (if user already has a Base license for other product)

Here below is an example for a company with 780 users and the following Microsoft Dynamics 365 licenses for the users:

- 150 Microsoft Dynamics 365 SCM Base users
- 20 Microsoft Dynamics 365 SCM Attach users
- 30 Microsoft Dynamics 365 Finance Base users
- 50 Microsoft Dynamics 365 Project Operations Attach users
- 100 Microsoft Dynamics 365 Activity users
- 75 Microsoft Dynamics 365 Team Member users
- 50 Microsoft Dynamics 365 Sales Attach users

This company is requesting Annata 365 for Finance & Operations and Annata 365 Sales

To license the Annata 365 for Finance Operations and Sales, they need:

- 1 (one) Annata 365 F&O Core license (includes up to 50 F&O Full access users)
- 130 Annata 365 F&O Full access user license  
Total 180 Annata 365 F&O Full access licenses (based on the 150 Dynamics 365 SCM Base and 30 Microsoft Dynamics 365 Finance Base users)
- 100 Annata 365 Activity users
- 75 Annata 365 Team Member users
- One Annata 365 Sales Core license (includes up to 50 Full access Sales users)

## License Requirements for Internal Users

### User SL

User SL means that the licenses are assigned on a named user basis, so each user requires a separate User SL named user subscription. Individual that has a User SL can access the service through multiple devices, but the User SL cannot be shared between users.

There are two types of User SL.

- **Full user**  
These users have full access<sup>1</sup> to the system and are licensed with the Annata 365 Finance & Operations user license.
- **Additional users**  
These users need limited access to the system to execute light tasks, such as consuming data and reports, register time and expenses etc.

### Device SL

The Device SL is licensed per device. Each Device SL permits one Device, used by any user, to access specific Menu Items in the Server Software to perform a defined set of white-listed tasks. This means multiple users can access a single device with individual logins without having User SL assigned to them. Device in this context is e.g. a shared computer on a workshop floor.

## Initial license purchase

Initial license purchase for new customers depends on the products being acquired.

- **Annata 365 for Finance & Operations:**  
1 (one) Annata 365 F&O Core license (includes up to 50 F&O Full access users)
- **Any of the Annata 365 Customer Engagement products (Sales, Customer Service, Field Service, Inspection etc.):**  
1 (one) Annata 365 CE Core license (includes up to 50 Full access users)
- **Annata 365 Dealer Portal:**  
1 (one) Annata Dealer Portal Core license (includes up to 300 users)

## License Requirements for External Users

External users are not employees, contractors, or agents of the customer or its affiliates (i.e. a separate company, an independent contractor). External users are end customers and third-party users of the organization or its affiliates and do not require SLs to access Annata 365 unless they are using functionality specifically designed for these external users like Annata 365 Dealer Portal users.

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<sup>1</sup> The level of access a user has to the system is determined by the Microsoft license assigned to that user.

Annata 365 customers have the option to license Annata 365 Dealer Portal to provide limited access to business processes or internal data for external users. In addition, external users may include off-site vendors not on an employee-like relationship with the organization or its affiliates (e.g. IT help desk support vendors serving multiple customer organizations).

However, external user access does not extend to the customer or the customer's affiliate's contractors, vendors, or agents providing business processes on the customer's behalf or using Annata 365 to manage any portions of their business (e.g. accounting, payroll, HR, telemarketing, data recording, social media marketing, etc.). In this sense, the customer may not use Annata 365 to provide business process outsourcing services to its clients.

### Multiplexing

Multiplexing is the use of a hardware, software or any other manual mechanism the Licensee uses to: (i) pool connections; (ii) reroute information; (iii) reduce the number of Devices or users that directly or indirectly access or use the Software; or (iv) reduce the number of Devices or users the Software directly manages, (sometimes referred to as "multiplexing" or "pooling"), does not reduce the number of Licenses (SLs) the Licensee is required to have.

The Annata 365 Customer Engagement products are designed to either work as a standalone product, or to work and interact seamlessly with Annata 365 Finance & Operations, sending and receiving data between the applications.

Customers that have Annata 365 Customer Engagement products and Annata 365 Finance & Operations products must make sure that users are properly licensed for both products.

## Annata 365 Subscriptions

Users can be licensed with either business applications license or additional user license.

### Annata 365 Applications

Application subscriptions are named user subscriptions where a user is licensed only for one individual application. Below is a list of Annata 365 business applications.

- Annata 365 Finance & Operations
- Annata 365 Sales
- Annata 365 Customer Service
- Annata 365 Field Service
- Annata 365 Inspection

### Annata 365 Additional users (Activity, Team Members and Device users)

As previously mentioned, the additional users are not subjected to the base and attach model. Additional users have limited access to the Annata Finance & Operations applications.





**Team Member user:**

Team member users will only have full read access to Annata 365 Finance & Operations data and can register hours to work orders.

**Activity user:**

Activity users have more access than the Team Member users and can approve activity related transactions. Create or edit the items related to warehousing, receiving, shipping, orders, vendor maintenance and budgets.

## Annata 365 product licensing

The application needed is based on users need, the business processes the user must have access to and execute, the data the user consumes and puts into the system.

As stated before, for all the Annata 365 products, the corresponding Microsoft product and license is needed by the user.

### Annata 365 Finance & Operations

Annata 365 Finance & Operations offers one Core application license and then three types of additional named user licenses; the Annata 365 Finance & Operations Full access user license, the Activity user license and Team Member user license. License types required are defined by **Menu Items** within the application.

**Menu Item** is an object that allows users to execute any of the following actions within the ERP solution (i) display or view a form, subform or URL (Uniform Resource Locator) in a browser application; (ii) run a task that triggers a system class, function, workflow or web-action initiated by a user; or (iii) cause an output in the ERP solution or a separate Device. The Menu Item objects can be run in two (2) modes: read-only (view data) or maintain (update, add, delete or authorize data). If a user or Device performs tasks that execute Menu Items corresponding to an Access License type that has greater functionality than the Access License the Licensee purchased, then the Licensee needs to step up his Access License to the higher Access License type that corresponds to the Menu Item the Licensee executed. In case of doubt about the description of the tasks performed by each Access License type or discrepancies between the tasks a user is entitled to perform and the Menu Items effectively executed, the list of Menu Items executed by each user dictates the Access License type the Licensee must license. The Licensee may use a combination of Device and user Access License. For additional information about Access Licenses please see: <http://annata.net/customers/SLTAddendumAnnataDynamics365>.

Each user Access License shall correspond to the highest type of user Access License based on the user's combined usage of the Microsoft Dynamics and the Software as further stipulated in the Menu Items.

**Access Licenses.** The Licensee must acquire and assign an Access License to each named user or Device that accesses the Licensee's Instances of the Server Software directly or indirectly.

- The Licensee's Access License permit access to the Licensee's Instances of earlier, but not later versions of the Server Software. If the Licensee is accessing Instances of an earlier version, the Licensee may also use an Access License corresponding to that version.
- The Licensee's user Access License inherits the rights attributed to lower level user Access License. The Software user Access License draws on a corresponding Microsoft Dynamics Access License.

### **Types of Access Licenses.**

There are two (2) types of Access Licenses: one for Devices and one for named users corresponding to the Access License types in Microsoft Dynamics; and one additional Access License type specifically for the Software, e.g. the 365 external dealer Access License.

### **User SLs for Subscription License and Security Roles**

The User SLs hierarchy is based on the requirements set forth in the Menu Item in a combination with security roles.

The security role assigned to a user determines if the user has access to relevant Menu Items and functionalities. Security roles within the Finance & Operations application provide package of solution functionality and access rights needed by the users to perform tasks relevant to them.

Customer can assign multiple security roles to a single user, the highest user SL type required covers all the user rights.

Activity and Team Member use rights are included in the full license (Annata 365 Core for Finance & Operations).

The User SLs are:

Full users SL:

- Full access SL (previously Enterprise or Operations SL)

Additional user SL:

- Activity SL
- Team member SL



### **Annata 365 for Finance & Operations Full access user**

Users requiring full access to the Annata 365 Finance & Operations business application must be licensed with the Annata 365 Finance & Operations Full access license. Corresponding Microsoft licenses are needed as described before.

### **Annata 365 Activity user**

The Annata 365 Activity license is a user licenses that grants limited access to the Annata 365 Finance & Operations business application. There is no base or attach licenses available for these users. This license is intended for light users that do not require full access to the system. Corresponding Microsoft licenses are needed.

### **Annata 365 Team Member user**

The Annata 365 Team Member license is a user licenses that grants limited access to the Annata 365 Finance & Operations business application. It is intended for users that require only read access to the system, and basic functionality such as time and expense registration. This license is intended for light users as described before. Corresponding Microsoft licenses are needed.

### **Annata 365 Device user**

The Device license is not licensed to an individual, but to a device, such as shared workshop computer, warehouse computer etc. The Device license does not grant full access to the system. Corresponding Microsoft licenses are needed.

### **Annata 365 Power Platform and Customer Engagement**

Annata 365 Power Platform and Customer Engagement currently offers 4 applications, Sales, Field Service, Customer Service and Inspection. These applications can be used as such, or in combination with Annata 365 Finance & Operations.

If these applications are to be used with the Annata 365 Finance & Operations products, then applicable Annata 365 Finance & Operations license may be needed, depending on how the applications are setup and used.

### **Annata 365 Sales**

This license is required for users who need access to the Annata 365 Sales application. The Dynamics 365 Sales application license from Microsoft is needed as well. If a user already has Annata 365 Finance & Operations Full access license then an Annata 365 Sales Attach user license is sufficient.

### **Annata 365 Field Service**

This license is required for users who need access to the Annata 365 Field Service application. The Dynamics 365 Field Service application license from Microsoft is needed as well. If a user already has Annata 365 Finance & Operations Full access license then an Annata 365 Field Service Attach user license is sufficient.



### Annata 365 Customer Service

This license is required for users who need access to the Annata 365 Customer Service application. The Dynamics 365 Customer Service application license from Microsoft is needed as well. If a user already has Annata 365 Finance & Operations Full access license then an Annata 365 Customer Service Attach user license is sufficient.

### Annata 365 Inspection

This license is required for users who need access to the Annata 365 Inspection application. Any D365 CE or Power Platform license from Microsoft is needed as well. If a user already has Annata 365 Finance & Operations Full access license then an Annata 365 Inspection Attach user license is sufficient.

### Annata 365 Dealer Portal

This license is required for external users who need access to the Annata 365 Dealer Portal. If the user is an internal user, the appropriate Annata 365 Finance & Operations license is needed. A separate Azure subscription from Microsoft is needed.

Annata 365 Dealer Portal provides certain set of functionalities through a web interface that integrates with the Annata 365 Finance & Operations solution. The portal enables dealers to create, monitor, and maintain transactions like parts orders, device orders and warranty claims directly within the manufacturers or importers solution. Transactions related to devices are based on those that already exist in the manufacturer or importer system.