

ReadSoft PROCESS DIRECTOR

License Installation Guide

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Legal Notice

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About licenses

Licenses are available for production and non-production clients and may have an expiry date (the license is only valid until a specified date) or a volume limit (the license is only valid for a specified number of documents).

You can activate licenses per system or per client. If you do not specify a client, the license is valid for all clients in the system.

License types

The following types of license are available. Volume limits are annual limits, which are reset every year on 1 January (only for licenses with no expiry date).

License type	Client type	Expiry date	Volume limit
1. Demo	Non-production only	No	No
2. Test	Non-production only	Yes	No
3a. Normal/Full	Production	No	Yes
3b. Normal/Full	Production	Yes	Yes

Process type licenses

You can obtain licenses for the following standard Kofax ReadSoft PROCESS DIRECTOR™ process types. You need a license for each standard ReadSoft PROCESS DIRECTOR process type that you want to use.

Process type	ID	Notes
Accounts Payable	IV	<p>For the Accounts Payable process type, you need a ReadSoft PROCESS DIRECTOR Accounts Payable (formerly INVOICE COCKPIT Suite) license. A separate license exists for ReadSoft PROCESS DIRECTOR Accounts Payable and its associated products.</p> <ul style="list-style-type: none"> • WORK CYCLE • ReadSoft EDI COCKPIT • ReadSoft Email-based Approval (formerly MOBILE APPROVAL) • ReadSoft INFO MAIL • ReadSoft WEB BOARD • Ariba integration for ReadSoft PROCESS DIRECTOR Accounts Payable (Activation license only) • Down Payments (This process type works on an Accounts Payable or Accounts Payable and ReadSoft EDI COCKPIT license.)
Customer Orders	SO	
Electronic Bank Statements	ES	
Financial Postings	FI	This license includes G/L Account Postings (FI) and FI Customer Postings (FIC).
Fixed Asset Postings	ASSET	<p>This license includes the following types of fixed asset postings.</p> <ul style="list-style-type: none"> • Asset Acquisition (AA) • Asset Retirement (AR) • Asset Transfer (AT)
Generic archiving	ARCH_BUS	
Goods Receipts	DN	
Invoice Block and Cancelation	IB	

Process type	ID	Notes
Master Data Maintenance	MD	This license includes the following types of master data. <ul style="list-style-type: none"> • Cost Center Maintenance (MD_COSTCTR) • Profit Center Maintenance (MD_PRCTR) • Vendor Master Maintenance (MD_VENDOMA) • Customer Master Maintenance (MD_CUSTMA) • G/L Account Maintenance (MD_GLACC) • Asset Master Maintenance (MD_ASSET)
Order Confirmations	OR	
Payment Advices	PA	This license works for Electronic Bank Statements too. A separate ES license is not required.
Payment Approvals	PR	
Requisitions	PO	
Umbrella Solution	UM	Activation license only. The Synchronizer program checks this license.
Workflows not assigned to a specific process	WC	See Workflow licenses .
Customer-defined process types	YZ	Customer-defined process types require only a single license for all customer-defined process types handled on a single PROCESS DIRECTOR installation.
ZUGFeRD	ZUGFERD	Activation license only.

Assign a license key for a process type

You can configure to assign a license key for a process type. This enables you to reuse an existing license key for a new process type, as well as to define and use a global license key.

1. Go to `/EBY/PDBO_VOBJ` (**expert IMG > Default system settings > Model > Object type**).
2. In change mode, in the Licenses section, use the search help to select the required object type.
3. Click the **Save** button.

Workflow licenses

You can activate workflow licenses per process type or as a separate global license independent of the process types you use. An exception is Accounts Payable. Using workflows with Accounts Payable requires a license for the [WORK CYCLE](#).

- In the case of a workflow license for a specific process type, the volume limit for workflows is usually equal to the document volume limit for the process type. However, you can specify a different volume limit for the workflow than for the process type. For example, for requisitions (PO), you can specify a document volume limit of 10,000, but a workflow volume limit of only 8,000. In this case, you can create 10,000 requisitions, but you can only send 8,000 to a workflow.
- In the case of a global workflow license (WC), the volume limit for the workflow license applies to all process types you use.
- You can combine a global workflow license with process-specific licenses. In this case, the global workflow volume limit applies only to those process types for which you have not activated a process-specific workflow license.

License counters

License counters count the number of documents that are processed in PROCESS DIRECTOR, but they are only incremented on production clients.

ReadSoft PROCESS DIRECTOR

For ReadSoft PROCESS DIRECTOR, counters are incremented in the following cases:

- A new document is created in ReadSoft PROCESS DIRECTOR, either via manual entry in the SAP GUI or the Web Application or via transfer from external sources.
- A document is sent to a workflow for the first time. If the same document is sent to other workflows, or is sent to the same workflow a second time, the counter is not incremented.

ReadSoft PROCESS DIRECTOR Accounts Payable

The following table describes how counters are implemented in the ReadSoft PROCESS DIRECTOR Accounts Payable applications:

Application	Counter	Counters checked	Counter type
PROCESS DIRECTOR Accounts Payable	Yes	PROCESS DIRECTOR Accounts Payable	Every document, except IDocs, transported into ReadSoft PROCESS DIRECTOR Accounts Payable is counted.
ReadSoft PROCESS DIRECTOR Accounts Payable Umbrella System	No	Total count of PROCESS DIRECTOR Accounts Payable and EDI COCKPIT	Activation license only.

Application	Counter	Counters checked	Counter type
ReadSoft EDI COCKPIT	Yes	EDI COCKPIT	Every IDoc transferred from ReadSoft EDI COCKPIT to ReadSoft PROCESS DIRECTOR Accounts Payable. The ReadSoft PROCESS DIRECTOR Accounts Payable counter will not increment.
ReadSoft PROCESS DIRECTOR Accounts Payable & ReadSoft EDI COCKPIT	Yes	PROCESS DIRECTOR Accounts Payable and EDI COCKPIT	Every document transferred to ReadSoft PROCESS DIRECTOR Accounts Payable, including IDocs.
WORK CYCLE	Yes	WORK CYCLE	The WORK CYCLE counter increments the first time a document is sent from ReadSoft PROCESS DIRECTOR Accounts Payable to a WORK CYCLE workflow. If you send the same document to a second workflow, the counter does not increment. Invoices created in WORK CYCLE are incremented in the PROCESS DIRECTOR Accounts Payable counter.
ReadSoft Email-based Approval (formerly MOBILE APPROVAL)	No	Total count of PROCESS DIRECTOR Accounts Payable and EDI COCKPIT	Activation license only.
ReadSoft WEB BOARD	No	Total count of PROCESS DIRECTOR and EDI COCKPIT	Activation license only. Invoices created in ReadSoft WEB BOARD are counted as ReadSoft PROCESS DIRECTOR Accounts Payable documents.
ReadSoft INFO MAIL	No	Total count of PROCESS DIRECTOR and EDI COCKPIT	Activation license only.
ReadSoft REPORTER	No	Total count of PROCESS DIRECTOR and EDI COCKPIT	Activation license only.
ReadSoft PERFORMANCE ANALYTICS	No	None. The system only checks if a valid license exists for PROCESS DIRECTOR.	Activation license only.

Note In the case of licenses with no expiry date, the license counters are reset every year on 1st January to the number of purchased documents. You can view the counters for previous years by clicking the Display counters for all years button in [/EBY/PD_LICENSES](#).

License validity

When a license for a process type has expired or the volume limit is exceeded, users cannot create new documents of this type in the SAP GUI and the ReadSoft Web Application. Transfer of documents from external sources is not interrupted, but a separate counter is incremented for these documents. When you renew the process type license, this separate counter is added to the license counter. For example, after the Customer Orders license has expired, 100 Customer Order documents are transferred to ReadSoft PROCESS DIRECTOR. You then renew the Customer Order license and 50 new Customer Orders are transferred. The total license count for Customer Orders is now 150.

When a workflow license volume limit is exceeded, no new workflows can be started. However, workflow processing is still possible for all documents that have already been sent to a workflow. For example, if a document is recalled from a workflow and then the workflow volume license is exceeded, it is still possible to send this document to a workflow again.

Note In the case of licenses with no expiry date, the volume limits are annual limits, which are reset every year on 1 January.

You can only have one active license installed per process type on one system. The license validity mechanism behaves differently depending on whether a production or non-production client is used.

- **Production client**

You can only activate normal licenses on a production client. Demo or test clients running on the same system use the normal license, because only one license can be valid on an SAP system. ReadSoft PROCESS DIRECTOR does not increment license counters in these clients.

The license expires when it exceeds the production client volume limit or passes the expiry date. If the production client license expires, ReadSoft PROCESS DIRECTOR will not also not function on the demo and test clients.

- **Non-production clients**

You can activate normal, demo and test licenses on non-production clients.

If a normal license is installed, the volume processed on the production client is taken into account. If a test license is installed, the expiration date on the production client is taken into account. If a demo license is installed, no validity and expiration date are used.

License threshold warnings

Fifteen days before the license expiration date, or when the license counter reaches the [defined](#) volume limit, threshold warning messages are displayed when ReadSoft PROCESS DIRECTOR is started. Threshold warning messages are not displayed in the Web Application.

To suppress the display of these messages in SAP, click No at the bottom of the dialog box. The messages will not be displayed again until the next threshold is reached.

Note These threshold warnings need to be configured for each desired user.

Threshold warning messages for WORK CYCLE and for applications that do not have a direct view in the SAP GUI (ReadSoft EDI COCKPIT, ReadSoft WEB BOARD and ReadSoft INFO MAIL) are displayed in ReadSoft PROCESS DIRECTOR Accounts Payable.

Once the license counter reaches 100%, ReadSoft PROCESS DIRECTOR will stop working (cannot be started) and new workflows cannot be started. However, workflow processors can continue to process their current documents.

Define license threshold warning recipients

You can define license [threshold warnings](#) only to those users who are responsible for ordering the licenses, rather than to each user who starts ReadSoft PROCESS DIRECTOR in the SAP GUI.

To define threshold warning recipients, complete the following steps.

1. In the IMG, select **Initial settings** > **Licenses** > **Manage license keys and activate process types** ([/EBY/PD_LICENSES](#)).
2. For Accounts Payable and its [associated products](#), in the IMG, select **Mandatory settings** > **Managing license key and activating product** ([/EBY / PD_LICENSES](#)).
3. Click **License threshold warning recipients**.
4. In change mode, add a new entry.
5. Enter the ID of each processor to whom license threshold warnings should be displayed. The **Complete name** field is filled when you press **Enter** or save.
6. Enter the desired threshold values.

Note All three fields (T1 [%], T2 [%], T3 [%]) need to be filled in (in ascending order), and the value in the T3 [%] field cannot exceed 99. By default, the fields are created having the values of 90, 95, and 99.

7. Click the Save  button.

Obtain and install licenses

Obtain a license

To order a license, you must provide your SAP installation number and SAP System ID. You can find this information by selecting the menu item **System > Status** in your SAP system.

You need the following information.

- **SAP System data > Installation number**
- **Database data > Name**
- **Usage data > Client** (only required if the license should be restricted to this client)

When you have placed your order, you will receive a license file in .TXT format. Your license file contains the following information.

Field	Description
License key	The license key provided by Kofax. This encrypted number validates the license.
SAP Installation Number	The SAP installation number of your system (that you provided to Kofax when you ordered the license).
SAP System ID	The SAP system ID of your system (that you provided to Kofax when you ordered the license).
Process type (not Accounts Payable)	The process type for which the license is valid.

Field	Description
Component ID (Accounts Payable only)	The ReadSoft PROCESS DIRECTOR Accounts Payable component for which the license is valid: <ul style="list-style-type: none"> • C – ReadSoft PROCESS DIRECTOR Accounts Payable • U – ReadSoft PROCESS DIRECTOR Accounts Payable Umbrella System • E – ReadSoft EDI COCKPIT • It is possible to run ReadSoft EDI COCKPIT together with ReadSoft PROCESS DIRECTOR Accounts Payable, with only a license for ReadSoft EDI COCKPIT. Requirements: 1. A valid ReadSoft EDI COCKPIT license. 2. The sum of the document counters for ReadSoft EDI COCKPIT and ReadSoft PROCESS DIRECTOR Accounts Payable must not exceed the license volume for ReadSoft EDI COCKPIT. • D – ReadSoft PROCESS DIRECTOR Accounts Payable & ReadSoft EDI COCKPIT • The volume is equal to the total documents processed by ReadSoft PROCESS DIRECTOR Accounts Payable and ReadSoft EDI COCKPIT. Adding this license removes any existing ReadSoft PROCESS DIRECTOR Accounts Payable and/or ReadSoft EDI COCKPIT licenses. • W – WORK CYCLE • I – ReadSoft INFO MAIL • B – ReadSoft WEB BOARD • M – ReadSoft Email-based Approval (formerly MOBILE APPROVAL) • T – TRAVEL EXPENSES • R – ReadSoft REPORTER
License type	The type of license: Demo, Test or Normal.
Client	The client ID, if the license applies only to a specific client.
Expiration date	The date on which the license expires.
Licensed volume/ Licensed number	The volume limit, that is, the number of documents for which the license is valid.
Workflow active (not Accounts Payable)	X indicates that the license includes the use of workflows. If this line is blank, workflows are not included.
Workflow volume (not Accounts Payable)	The volume limit for workflows, that is, the number of documents that can be sent to a workflow.

Install a license

To install a license, ReadSoft PROCESS DIRECTOR must already be installed. There are two ways to install licenses:

- [Enter license information in ReadSoft PROCESS DIRECTOR](#)
- [Transport an existing license from one system to another](#)

Enter license information in ReadSoft PROCESS DIRECTOR

To enter license information in ReadSoft PROCESS DIRECTOR, complete the following steps.

1. Go to `/EBY/PD_LICENSES`.
For Accounts Payable and its [associated products](#), go to `/COCKPIT/C46`.
2. In change mode, add a new entry.
3. Enter the license [settings](#). You can find the required information in the [license file](#) supplied to you by ReadSoft.
4. Click the Save  button.

Transport an existing license from one system to another

It is possible for a product component to have more than one license installed on the same machine. However, only one can be valid at any one time, because only one will match the SAP system (the SAP Installation Number and SAP System ID [Database Data Name]) it is installed on.

When working on an instance of ReadSoft PROCESS DIRECTOR that you wish to migrate, or transport, from one system to another, the licenses are included. This means that you can install a normal/full ReadSoft PROCESS DIRECTOR license in a demo/development system and transport it to the test/QA system, and later to the normal/production system. The normal license will only be used/valid when it matches the SAP Installation Number and SAP System ID (Database Data Name) used within the (production) system.

License settings

Manage license keys and activate process types

PROCESS DIRECTOR

`/EBY/PD_LICENSES`

PROCESS DIRECTOR

Initial Settings > Licenses

Setting	Description
Object type	The process type that is to be activated. Note For the Accounts Payable process type and its associated products, licenses are activated in / COCKPIT/C46 .
SAP Inst Number	The SAP installation number of your system (that you provided when you ordered the license).
SAP Sys ID	The SAP system ID of your system (that you provided when you ordered the license).
Client	If the license applies only to a specific client, enter the client ID here.
State	When the license has been created, an icon is displayed that indicates the license status: <ul style="list-style-type: none">  The license is valid. A license is valid when the license key is not corrupted.  The license key is invalid.  The license key is valid, but is for a different system (the SAP system ID or installation number differs from that of the current system).
License key	The license key provided. This encrypted number validates the license.
License type	The type of license: Demo, Test or Normal.
Licensed vol.	If your license has a volume limit, enter the licensed number of documents here. This field is not available for the process type WC (global workflow license). Use the field Workflow volume to enter the volume for a global workflow license.
Expiration date	If your license expires on a specific date, enter the expiration date here.
Workflow active	Activate this option if your license includes the use of workflows.
Workflow volume	Enter the number of licensed documents for workflows.

Note [License counters](#) are reset every year on 1st January to the number of purchased documents (only for licenses with no expiry date). You can view the counters for previous years by clicking the Display counters for all years button.

ReadSoft PROCESS DIRECTOR Accounts Payable

/COCKPIT/C46

Mandatory settings > Managing license key and activating product

Setting	Description
License key	The encrypted number that validates the license.
SAP installation no.	The SAP Installation number of your system.
Client	The client number of your system. Optional—only if your license is restricted to a specific client. If the Client is not provided in your license, the license is valid for all clients.
SAP System ID	The SAP System ID of your system.
License products	The ReadSoft PROCESS DIRECTOR Accounts Payable component the license is valid for: <ul style="list-style-type: none"> • C - ReadSoft PROCESS DIRECTOR Accounts Payable • E - ReadSoft EDI COCKPIT • It is possible to run ReadSoft EDI COCKPIT together with ReadSoft PROCESS DIRECTOR Accounts Payable, with only a license for ReadSoft EDI COCKPIT. Requirements: 1. A valid ReadSoft EDI COCKPIT license. 2. The sum of the document counters for ReadSoft EDI COCKPIT and ReadSoft PROCESS DIRECTOR Accounts Payable must not exceed the license volume for ReadSoft EDI COCKPIT. • D - ReadSoft PROCESS DIRECTOR Accounts Payable & ReadSoft EDI COCKPIT • The volume is equal to the total documents processed by ReadSoft PROCESS DIRECTOR Accounts Payable and ReadSoft EDI COCKPIT. Adding this license removes any existing ReadSoft PROCESS DIRECTOR Accounts Payable and/or ReadSoft EDI COCKPIT licenses. • W - WORK CYCLE • I -ReadSoft INFO MAIL • B - ReadSoft WEB BOARD • M - ReadSoft Email-based Approval (formerly MOBILE APPROVAL) • T - TRAVEL EXPENSES • R - ReadSoft REPORTER
License type	The type of license: Demo, Test or Normal.
Expiry date	The date the license expires, at which point you can no longer use the software without installing a new license.
Licensed amount	The production server volume limit for Normal licenses.

- Clicking [License threshold warning recipients](#) allows you to customize [threshold warnings](#) so that they are displayed only to those users who are responsible for ordering the licenses, rather than to each user who starts ReadSoft PROCESS DIRECTOR in the SAP GUI.

View license information

You can only view license information in the SAP GUI.

To view information about your ReadSoft PROCESS DIRECTOR licenses, complete the following step.

- Go to transaction `/EBY/PD_LIC_INFO`.

To view information about your ReadSoft PROCESS DIRECTOR Accounts Payable or WORK CYCLE license, as well as other associated products, complete the following steps.

1. In ReadSoft PROCESS DIRECTOR or WORK CYCLE, on the **Extras** menu, click **Info**.
2. Select the **Licenses** tab.