



sage

# *Licensing guide*

Sage data management and analytics

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# Introduction

## *Sage X3 data management and analytics*

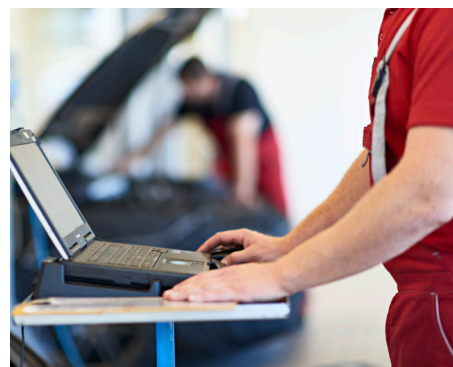
### Using this guide

Thank you for choosing Sage data management and analytics. This guide is meant to provide a basic understanding of how Sage data management and analytics is licensed for use. It is designed to help you make a more informed decision in regards to the technical or solution capabilities you are seeking and the investment choices you make in regards to the licensing of the software. The examples provided in this guide are for illustration purposes only. Sage reserves the right to review or update this document at any time without any notice. We hope you find this guide useful. If you have any questions about licensing, pricing or related topics, feel free to contact your Sage representative or certified Sage channel partner.

Sage data management and analytics is an enterprise-grade analytics platform that is tightly integrated with Sage X3 for rapid deployments of data-warehouse, analytics data model and best-in-class industry analytics. The solution comes with :

- Data manager for data extraction, modeling and transformations of data from Sage X3 as well as other business systems.
- Data visualisation that is embedded in Sage X3 in addition to access via the web or mobile devices.
- Best-in-class industry analytics.

With a firm focus on business transformation and time-to-value, Sage data management and analytics helps you reduce your risks in your pursuit to be a data-driven organisation.



# Licensing components

## *Server, named users, data sources, data models, analytics*

Sage data management and analytics licensing is designed to provide licensee with the appropriate technical and solution capabilities that best fit the licensee organisation's requirements at any given time. There are five licensing components of which three components have a dependency relationship with the two primary components—namely—Server and named user. All sets of functionality must be licensed by Server and named user components.

### Server Component

Server component entitles a licensee to deploy and use the precise set of Sage data management and analytics functionality that is required to support the organisation's data management and analytics requirements. Server components are licensed by the number of instances and is restricted by Network Domains and Server Names. A server component must be licensed together with named user component. There are essentially two types of Server Components. Sage Data Management Server and Sage Analytics Server. (Figure 1)

**Sage X3 Data Management Server**—Sage data management server is an enterprise-grade suite of functionality that is designed to support data extraction, data transformation, data pipeline, analytics data modeling and data administration functions. The Data Management Server allows users to perform extract, load and transform (ELT) process to transfer the source data to a data warehouse, hosted on SQL Server Database Engine. Tools, including filters, calculations, table relationships, unions, lookups, and SQL statements, allows a licensee to easily manipulate the source data step-by-step into the desired form. Standard transformation settings enables the licensee to control analytics specific structures such as measures, dimensions, hierarchies, etc.

**Sage X3 Analytics Server**—Sage analytics server is a suite of rich visualisation features that entitles the licensee to create and modify queries, analyse and visualise the data, produce reports, create dashboard, set-up alerts, insert rich text commentary, publish and distribute the contents. It is a light foot-print, elastic and highly scalable analytics engine.

### Named user component

A named-user (Figure 1) entitles the users to access the licensed software functionality in the Server Component and is mandatory for each Server Component. The tasks and roles of the individual will determine the requirements and the profile of the named user licensee. Named users are priced per user. A named user can be valid for one or more Server components. The different profiles of named users include:

- **Administrator**  
Receives all the permissions described for the Full Designer role below, and can also manage an organization's policy. This role differs from the System Administrator in that it is specific to the selected organization. That is, users with this role have full control to manage the roles and policy for the selected organization only. The Administrator role also doesn't have access to some application and language settings that system administrators can access.
- **Full Designer**  
Can create and design resources in every category, including background tasks, data models, events, publication rules, data sources, and model and cube servers. In addition, this role is able to license solutions and manage resource security. The only restriction is on managing organization security (granted with the Administrator role).

- **Report Designer**

Can create and design resources in the package category (dashboard, report pack, webpage, image and rich text resources), the report category (analysis report, chart, drill-through and reporting services resources) and the elements category (calculated member, function, named set, shape and slicer resources). Unable to edit events, publication rules, data models, data sources, and model and cube servers. Unable to manage background tasks or security.

- **Model Designer**

Can create and edit data models, import and export resource packages, and manage background tasks. Unable to create any non-model resources. If a data model-only license permission is in force, only this role and the Administrator role are available. See Understanding the Data Model-Only License Permission for details.

- **Analyst**

Can do all that a Consumer can do, but can also create resources in the package category (dashboard, report pack, webpage, image and rich text resources), the report category (analysis report, chart, drill-through, KPI, reporting services and scorecard resources) and the elements category (calculated member, function, named set, shape and slicer resources). The resources must be saved in the user's personal folder. Analysts can also export and import resources.

- **Consumer**

Can view existing resources (read-only access), and perform resource management tasks (copy, paste, rename, save as and delete) in their personal folder only, but is not able to create or distribute resources.

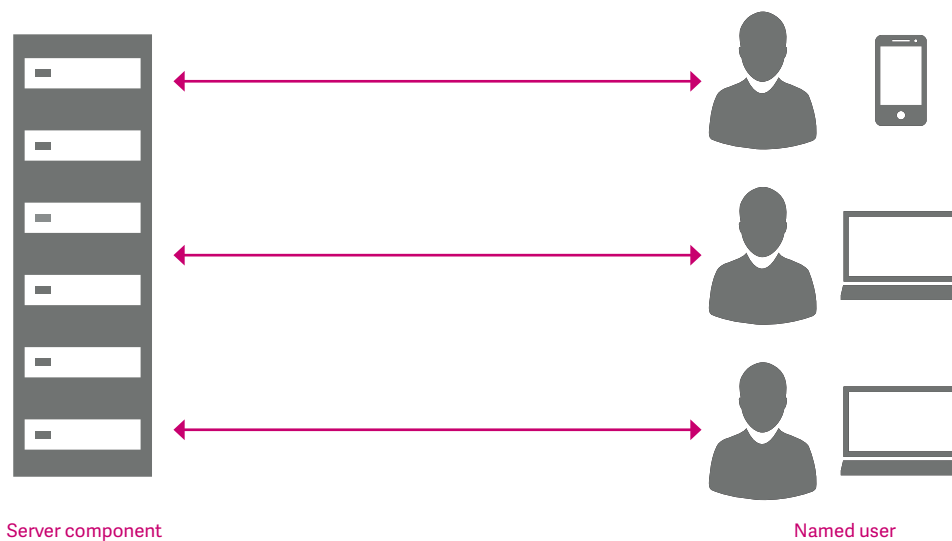


Figure 1: Server and named user components

The Server license components along with the named user license components, maintain a unidirectional control over the access to the other 3 license components – namely – Data Source, Data Models and Analytics solution(s). (Figures 2, 3 & 4)

## Data source connection component

The first step in creating a new data model is to set-up a data source connection. A data source is essentially a data repository from which data is extracted and transformed to a query optimised data model. A data source maybe a database type or instance, Microsoft Excel™ workbooks or O Data protocol compliant data services. In order to connect to a data source so as to extract, transform and load data from it for analysis purposes, the licensee must first obtain a relevant data source license. For example, each instance of Sage X3 ERP is considered an individual data source. Additionally, data source connections component can also be licensed by additional tables. For licensees of Sage X3 ERP who wish to extract transform and load data from customized tables in Sage X3 ERP, data source connections for additional or unlimited tables and data is mandatory. (Figure 2)

**Please note:**

If a licensee wishes to connect to multiple instances of Sage X3, then, the licensee must procure additional data source connections—one connection per instance of Sage X3.

Data Source connections components can be licensed by tables or database instances.

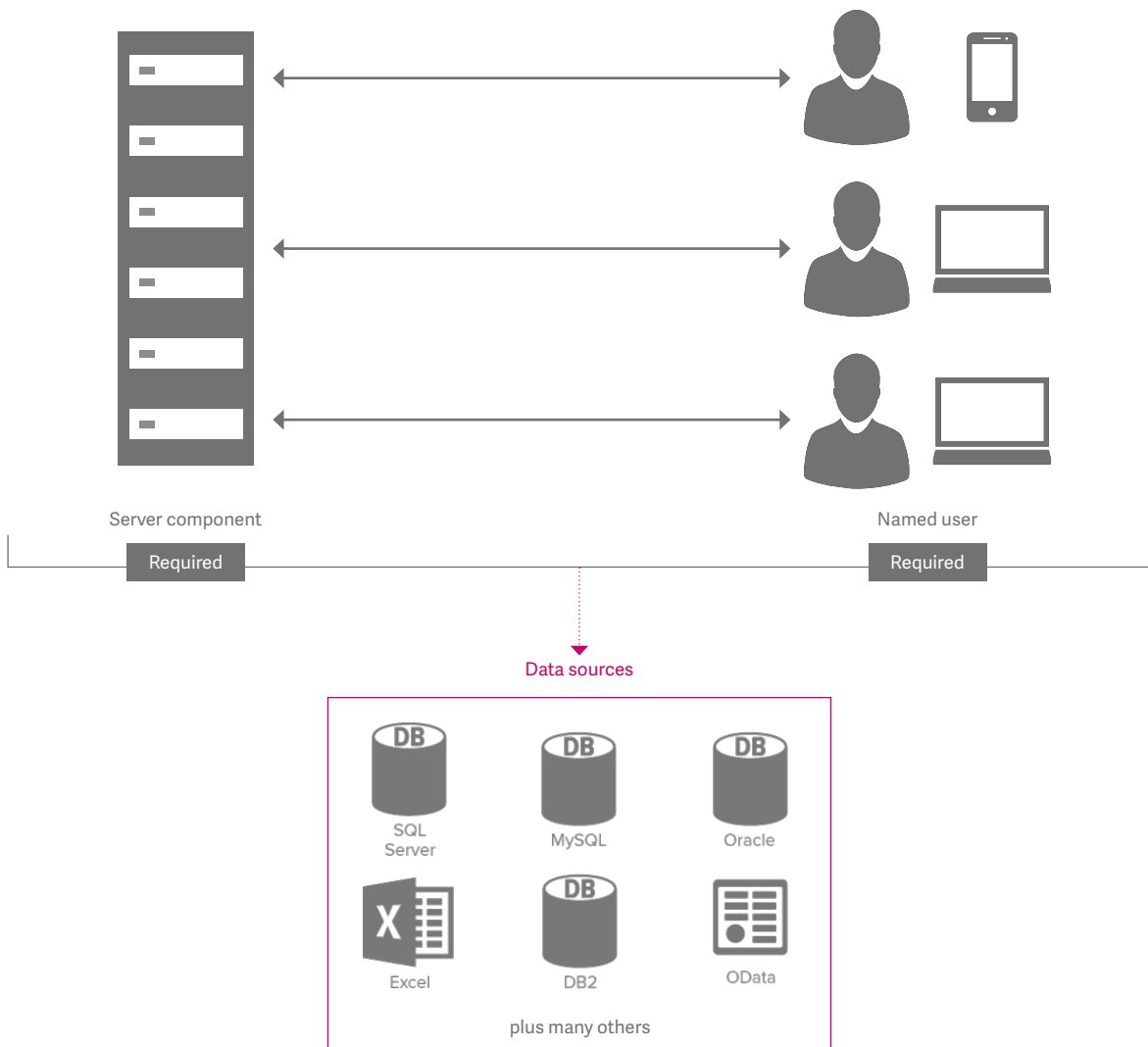


Figure 2: Data source component license

## Data model component

A Data model component refers to pre-built query optimized database model where-in the relevant data model already contains data extraction and transformation functions specific to a pre-existing data structure in a data-source. Sage X3 data model is a typical example of a data model license component. In this case, the data model consists of extraction routine and transformation pipelines that are specific to the Sage erp data, thus automating the building of relational and multi-dimensional schema for reporting and analysis purposes. The data models are fully customisable and extensible. (Figure 3)

Please note:

- A licensee with multiple instances of Sage X3 will only require to purchase Sage X3 data source connections per instance of Sage X3. One license of Sage X3 data model will apply to all Sage X3 data sources.
- The ability to customise a pre-built data model is licensed through data source license component.

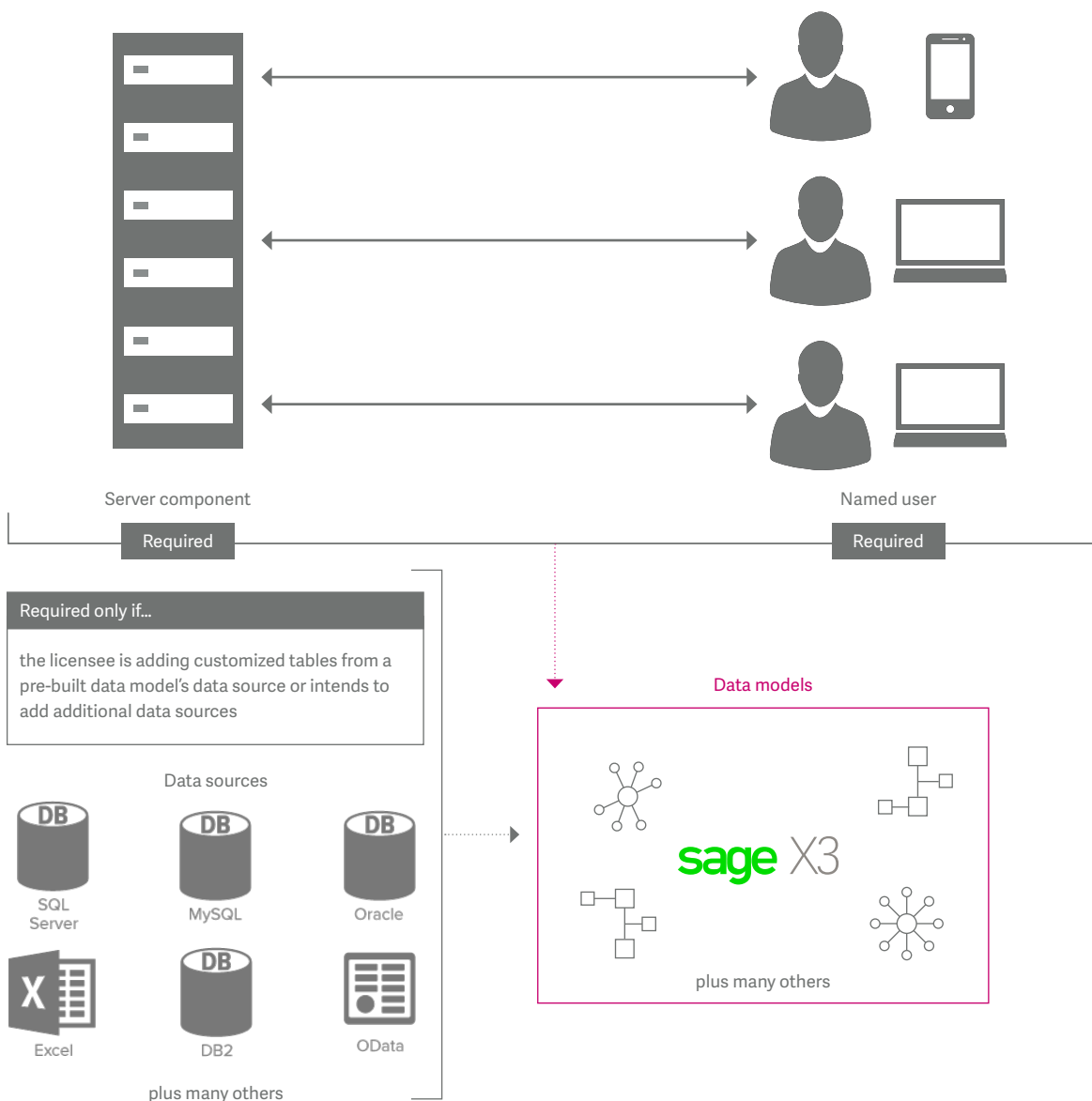


Figure 3: Licensing data models (pre-built data models)

## Analytics solutions component

An analytics solution can be thought of as a template that can be used to access pre-built best-in-class analytics specific to a pre-built data model. It is similar to a Microsoft Office template file, which makes it easy to create multiple documents based on a standard template. By using an analytics solution component, a licensee can automate the process of generating rich pre-built visualisation, reports, calculations, analysis, dashboards etc that are specific to a licensed pre-built data model. Each of these pre-built analytics resources such as reports, calculations, dashboards etc can be easily edited/ customised by end users with the appropriate levels of access. New analytics content can be created and combined with the pre-built analytics using the license entitlements under named user component. (Figure 4)

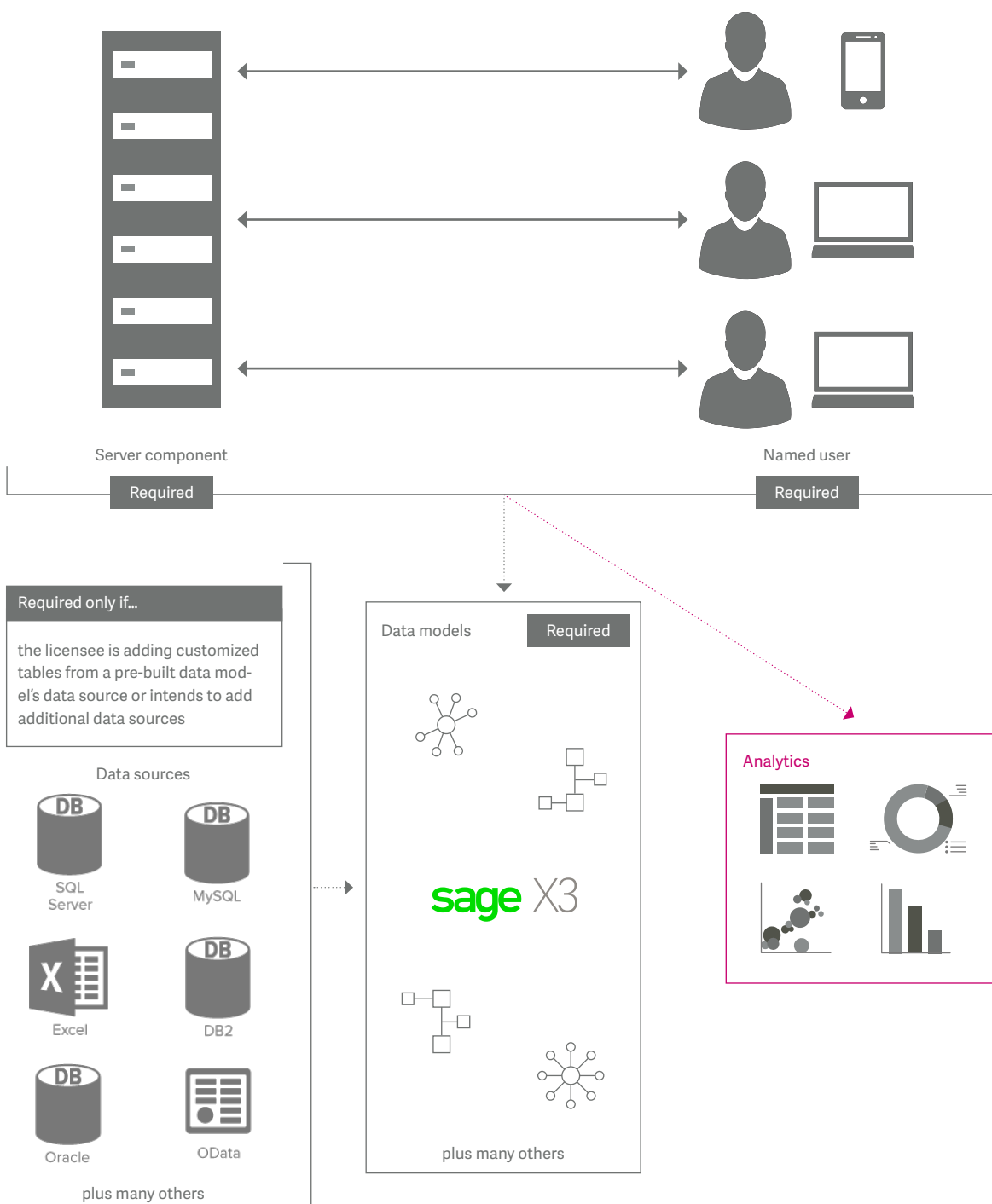


Figure 4: Licensing analytics solutions



# Types of licenses

## *Perpetual licenses and subscription licenses*

### Perpetual license

A perpetual license entitles a licensee to use a licensed Sage data management and analytics software for an unlimited period of time. A licensee pays for the license upon securing a license activation key or license file. A licensee who holds a perpetual license, must have a separate valid maintenance agreement with Sage in order to access maintenance and support services such as patches, fixes, error corrections, and upgrades. Purchase of a valid maintenance agreement is mandatory for the first year of use of license. Please note that while the license to use the software functionality is for an unlimited period when a perpetual license is purchased, maintenance agreements are valid only for a period of twelve (12) month cycles and is subject annual maintenance fees.

### Subscription license

In addition to Perpetual license type, Sage data management and analytics software is also available on an annual subscription basis. Subscription-based licenses entitles the licensee to the use of licensed Sage data management and analytics software for a specified period of time. Under a subscription license the software is installed and hosted either at a remote location maintained by Sage or at a licensee's own premises or data centre. The subscription fees for identical software functionalities will vary based on the party that hosts the software. In order to ensure uninterrupted access to the licensed software functionality, a licensee must renew their subscription agreement prior to the expiry of the then current and valid subscription agreement. The subscription agreement and the appropriate subscription fees are renewed on an annual basis. This type of license also entitles the licensee to support & maintenance services as set out in the maintenance agreement.

# License starter packages

## for Sage data management and analytics software and solution

A licensee may procure Sage data management and analytics' primary and dependent components based on the licensee's unique business circumstances and requirements. Alternatively, Sage also offers bundled starter packages that are based on typical business user scenarios. These scenarios have been devised based on user feedback and usage patterns. Licensees of bundled packages who hold a valid maintenance or subscription agreement are entitled to incrementally procure additional software functionality based on the changing business requirements. Sage reserves the right to review and update these bundle packages at any time without any prior notice. Below is a list of bundled packages that a licensee may procure.

### Sage X3 Data Management Bundle

Packaged for any Sage X3 customer who wants to have control over their data in Sage X3 by providing an analytics data management platform that provides consistent and governed data which can be analysed using any compliant visualisation and reporting applications. Sage X3 Data Management bundle.

#### Includes

- Sage Data Management Server
- 1 named user
- Sage X3 Data source
- Sage X3 Data model
- This bundle does not provide access to Sage analytics server or related functionality.

### Sage X3 Analytics Bundle—Standard Edition

If you have deployed Sage X3 and you are starting to accumulate valuable data across your business, Sage X3 Standard Analytics Bundle provides you with all you need to manage, govern and present analytics and reports to your business. It entitles you to access the Sage X3 standard database tables.

#### Includes

- Sage Data Management Server
- Sage Analytics Server
- 6 named users
- Sage X3 Data Source
- Sage X3 Data Model
- Sage X3 Analytics solution

### Sage X3 Analytics Bundle—Advanced Edition

For any Sage X3 customer who is growing fast and understands the value of data from Sage X3 in conjunction with potentially other data sources, Sage X3 Advanced Analytics Bundle provides you with a platform that can be used by 21 named users within the your organisation. It can connect to Sage X3 data source standard tables, custom tables and one additional data source so that you can provide excellent insights and outcomes that the business may take action upon.

#### Includes

- Sage Data Management Server
- Sage Analytics Server
- 21 named users
- SAGE X3 Data source
- Sage X3 Data Model
- Unlimited data tables from a single instance of Sage X3 data source
- 1 additional data source
- Sage X3 Analytics solution

### SAGE X3 Analytics Bundle—Enterprise Edition

For those Sage X3 customers that have legacy data-sources to manage, large volume of transactions, rapidly expanding as well as potentially diverse operations, large pool of users and multiple instances of Sage X3. Sage X3 Enterprise Analytics Bundle provides you with a scalable platform that can grow with your needs and truly be the solution that can differentiate you from your competitors.

#### Includes

- Sage Data Management Server
- Sage Analytics Server
- 51 named users
- Sage X3 Data Source
- Unlimited tables
- 3 Additional Data Sources
- Sage X3 Data Model
- Sage X3 Analytics Solution

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