



Apteco

Technical Guide

Helping you to get the most out of the
Apteco Marketing Suite™

Apteco Licensing Guide
D029TIX002 – Q1 2020

Licensing the Apteco Marketing Suite

D029T1X002 - Q1 2020

Revision Tracking Sheet

This manual may be revised periodically to incorporate new or updated information.

Note:

While every effort has been made to keep the information up to date, there may be changes to the locations for the Microsoft .Net files, if in doubt contact your support department.

Listed below is the revision date of each page (if applicable):

Page Revision

All pages D029T1X002 - Q1 2020

Section 7 – Note related to Q1 2020 release of FastStats Designer

Contents

1	New Licensing Overview.....	1
1.1	Bundles (Product/feature packaging)	1
1.2	Implementation and Licence Options.....	2
1.3	Licensing Mechanism	3
1.3.1	Modules vs Bundles	4
1.3.2	Support Slots.....	6
1.4	Technical Considerations	6
1.4.1	Adding the default Email Templates.....	7
1.4.2	Testing the Connection to the Apteco Licensing Server	7
2	Installing a Licence in a New System.....	8
3	Adding and Removing Users.....	10
3.1	Adding Users to a Licence	10
3.2	Removing Users from a Licence	11
4	Installing an Updated Licence.....	12
5	Administering Partner Licences if Applicable.....	14
5.1	Enabling Admin users on a Production System	14
6	Licence Caching.....	15
6.1	What if the application server has no outbound internet connection?	15
6.1.1	Connection via the Web Server	15
6.2	Application Server and Web Server have no Outbound Connection	16
6.3	Licence Usage	16
6.3.1	Usage Data - What usage information do we capture?.....	17
6.3.2	Manually Managing the Usage Data	18
7	Licensing in FastStats Designer	19
	Appendix A: Changes to Licensing	21
	Appendix B: Troubleshooting.....	22
B.1	User Not Licensed Error	22
B.2	Error Caused by Different Versions of FastStats	23
B.3	System Startup reports “Number of records exceeded”	24

1 New Licensing Overview

1.1 Bundles (Product/feature packaging)

The Apteco Marketing Suite moved to being sold with a new licensing structure in January 2019. We now sell 6 Bundles to divide features into relevant groups – 3 for FastStats (Analyse) and 3 for PeopleStage (Campaign).

The Approved Reseller chooses the Bundle(s) to purchase.

FastStats (Analyse) Bundles

- Selector
- Analyser
- Predictor

PeopleStage (Campaign) Bundles

- Broadcaster
- Campaigner
- Orchestrator

Each Bundle includes several users. You can add extra users as required.

FastStats (Analyse)	Users	PeopleStage (Campaign)	Users
Selector	2	Broadcaster	2
Analyser	5	Campaign	5
Predictor	10	Orchestrator	10

A licensee can decide on a bundle which holds a set of features. Only one Bundle can be purchased per product, FastStats or PeopleStage. The features contained within the Bundle are available to all individual named users that are assigned with the Licence. Licences are provided on a named user basis and user accounts cannot be shared.

The features within a Bundle may change from time to time at Apteco's sole discretion but not within a current licence term.

1.2 Implementation and Licence Options

Licensing approach;

- 1 FastStats Bundle is required per customer per data centre but allows multiple databases to be created.
- 1 PeopleStage Bundle is required for each database instance.
- The bundle licence allows client access
- The Software can be hosted anywhere (on premise, cloud, at Approved Reseller)

Addons;

All standard features will be included within Bundles.

- Additional users for Analytics and campaign bundles will be charged at a flat fee which is the same across all Bundles.
- Geo postcode Boundaries and Microsoft Bing Map keys will be purchased as optional addons.

Features being added to a Bundle during a license period will become available to customers once the client is using the version containing the feature.

Note:

Apteco Orbit is our browser-based platform designed for wider use throughout an organisation and does not require a licence.

We still support older software versions and legacy licences at this point.

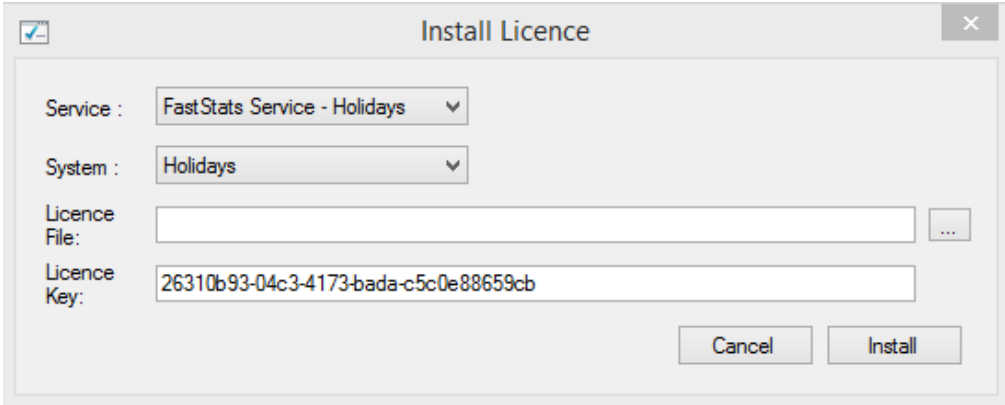
1.3 Licensing Mechanism

Value-Based Pricing (VBP) introduced with Q2 2019

The Apteco Marketing Suite introduced changes to the software licensing to move to the new Bundle Licensing - (VBP) structure. The traditional Modules licences (XML file) are still supported, and very little has changed in terms of administering licences.

Bundle licences are applied using a unique licence key. The FastStats Configurator application connects to Apteco's licensing service and automatically pulls back the licence details assuming there is an available outbound internet connection.

Example adding a licence via the Licence Key



There is no difference to the software functionality for Apteco Marketing Suite users.

For FastStats administrators running the Q2 2019 release, there are notable benefits

- Ability to add licences just by the Licence Key
- Connections to the FastStats Licensing server can automatically pick up changes to installed licences; there is no need to install a new licence
- Introduction of designated support slots simplifies the task of allocating administrators to FastStats systems

1.3.1 Modules vs Bundles

Traditionally, FastStats licences have software modules assigned to them (e.g. Base, Modelling, Cascade, PeopleStage) and the FastStats Administrator assigns users to these modules in the FastStats Configurator. A user can only use the functionality for the modules allocated to them.

With new value-based pricing, groups common software features into "bundles" which better reflect a customer's marketing activity and sophistication. Each Bundle comes with a different set of functionalities.

Note:

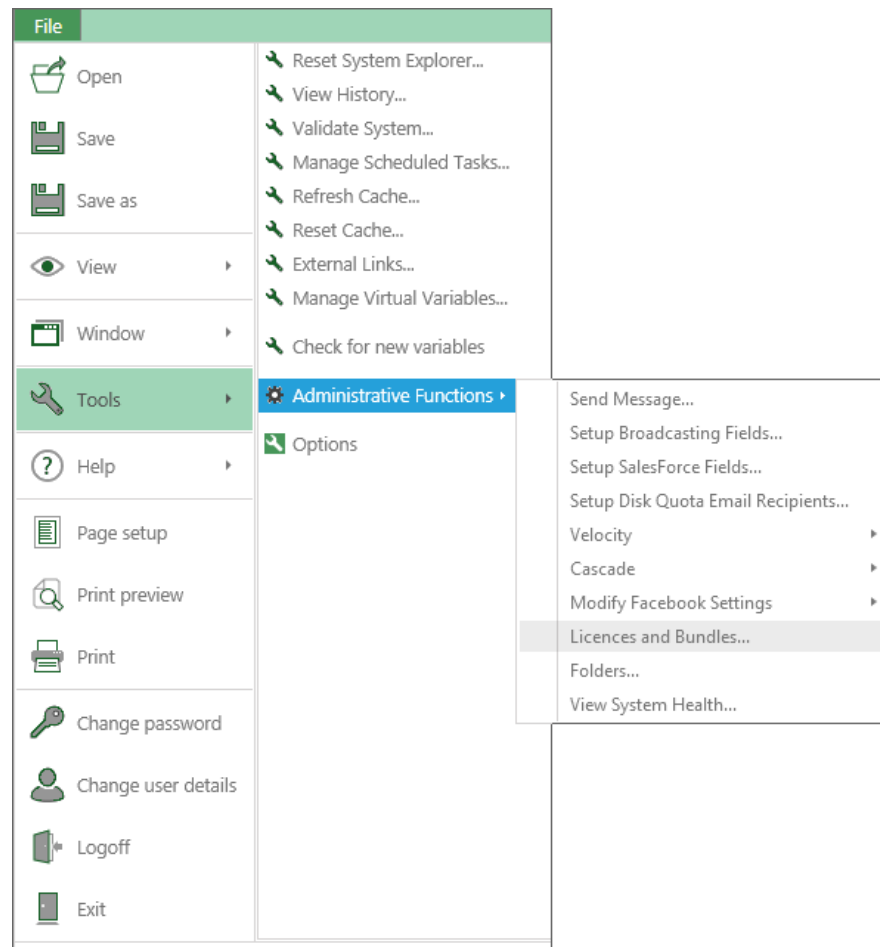
Apteco Orbit can be used by anyone in the organisation without a licence, Apteco is continually adding functionality to Orbit.

FastStats	PeopleStage	Orbit
Selector	Campaigner	No Licence required
Analyser	Orchestrator	No Licence required
Predictor	Broadcaster	

How your Licence is supplied depends on your infrastructure and how it is purchased, you might be supplied with either a new-style licence or a traditional module-based licence file.

When you are supplied a licence file from Apteco you will be given a version of the Licence stored as a .xml file and a licence key. The .xml files have been designed so that they can cope with both pricing structures and are fully backwards compatible. This means that you can still use the .xml licence files with older versions of the software (pre Q2 2019).

FastStats administrators will notice that the menu option for administering licences within FastStats has been renamed from **Licences and Modules** to **Licences and Bundles**. This change was introduced in the Q1 2019 version of the software and meant that some of the tables behind-the-scenes in the web service control database were restructured, in preparation for the changes introduced in the Q2 2019 release.

Apteco FastStats File > Tools > Administrative Functions dialogue

One key difference with the Q2 2019 release is that users are not automatically added to a bundle unless the Licence has 'unlimited' users added to a bundle.

Users can see their allocated bundles by going to Help > About > Licence within FastStats.

1.3.2 Support Slots

Added Q2 2019

One new feature of licensing which is the concept of support slots.

Any licences issued by Apteco from June 2019 onwards have support slots allocated to them. These support slots offer an easy way of allocating FastStats administrators to a licence without them counting towards any of the bundle allocations or requiring the use of a Partner licences which are being phased out. In the example below you can see that this Licence contains two support slots. If a user is assigned a support slot, they will be given all the features contained within any bundles that have been purchased by the customer.

Two SupportSlot users the Licence with Licence ID 10005

Licences and Bundles						
Licence ID	Description	Allocated	Type	Support Slots		
10005	VBP Enterprise Test Licence	5	Enterprise	2		
Username	Predictor	Orchestrator	Cascade Add	SupportSlot		
Administrator	☐	☐	☐	☒	☐	Remove
cwalker	☐	☐	☐	☒	☐	Remove
nwalker	☒	☒	☐	☐	☐	Remove
rthumwood	☒	☒	☒	☐	☐	Remove
achislett	☒	☒	☐	☐	☐	Remove
Allocated :		3	3	1	2	
Limit :					2	
Remaining :					0	

The default administrator user (User ID 1) has access to Administrative Tools such as the Users Explorer and the Licences and Modules and no other features within the Bundles.

Adding the Administrator to a Support Slot as shown above allows them access to all the features relating to the customers purchased Bundle. This allows the Administrator to use the system with the purchased feature set and fully support the system without impacting on the Bundled user count.

In order to ensure audits can be carried out if required you should create named user accounts with and assign them to Support Slots.

1.4 Technical Considerations

If the FastStats application server is running multiple FastStats Services with the Q2 2019 release (or later), then it is important that each system is using the same version of the FastStats Web Service and that the Web Service control databases are all up to date.

[See the Troubleshooting section for more information](#)

1.4.1 Adding the default Email Templates

Important

You must add the default email templates in the following areas to allow the system to send Cache/PeopleStage warning emails

1. From the FastStats Configurator > **FastStats Services** > highlight the relevant Service and Click **Properties**
2. From the System name tab > **Emails** click **Add Default Templates**
3. Ensure you complete the top section with your relevant details
4. Repeat this process for the **Web Services** System name tab Emails

FastStats Service Configuration : c:\program files\apteco\faststats service\holidays\faststats64service.exe.c...

File Systems

General Holidays

☒ Start Automatically

☒ Send Emails

Admin Email Address (to) :

Admin Email Address (from) :

SMTP Server :

SMTP Username (blank for default):

SMTP Password :

SMTP Port : 25

SMTP Retry attempts : 5

SMTP Retry delay (seconds) : 60

☐ Use SSL

☒ Log Emails

Attachment extension : .txt

Check Connection

Installed templates :

c:\faststats\Publish\Holidays\emails\admin_credit_remaining_warning.txt
 c:\faststats\Publish\Holidays\emails\delivery_fail.txt
 c:\faststats\Publish\Holidays\emails\deliveryagent_error.htm
 c:\faststats\Publish\Holidays\emails\diskquota_fail.txt
 c:\faststats\Publish\Holidays\emails\diskquota_user_fail.txt
 c:\faststats\Publish\Holidays\emails\diskquota_user_warning.txt
 c:\faststats\Publish\Holidays\emails\diskquota_warning.txt
 c:\faststats\Publish\Holidays\emails\Licensing\DataLayout.rtf
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_delivery.htm
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_delivery.txt
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_errors.htm
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_errors.txt
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_jobapproval.htm
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_jobapproval.txt
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_jobcancelled.htm
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_jobcancelled.txt
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_jobcompleted.htm
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_jobcompleted.txt
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_jobdelayed.htm
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_jobdelayed.txt
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_jobrunning.htm
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_jobrunning.txt
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_jobstarted.htm
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_jobstarted.txt
 c:\faststats\Publish\Holidays\emails\PeopleStage\admin_lockdelayed.htm

Add Default Templates

Open Template Folder

1.4.2 Testing the Connection to the Apteco Licensing Server

Enter the following URL in a browser, you should receive the following response

```
{"status":"Healthy","totalDuration":"00:00:00.0000043","entries":{}}
```

<https://licence-service-proxy.licensing.apteco.com/api/health>

2 Installing a Licence in a New System

Installing a licence with the Q2 2019 release or later can be done via the licence .xml file or the supplied Licence Key.

If you are installing a licence via the .xml file, then you must copy the file onto the FastStats application server.

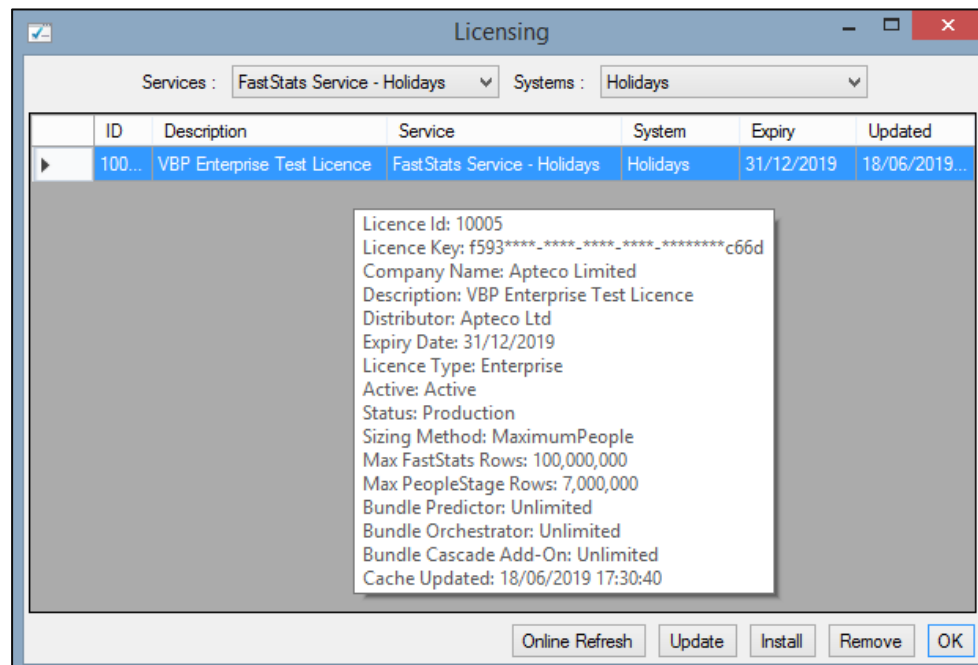
1. Run the **FastStats Configurator** on the FastStats application server
2. Choose **FastStats Services**
3. Click **Licensing**
4. Click **Install**
5. Choose the relevant FastStats Service from the **Service** dropdown
6. Choose the relevant system from the **System** dropdown
 - a. Either:
 - b. Enter the supplied **Licence Key**

Or:

- a. Click the ellipsis button to navigate to the supplied .xml file
 - b. Click **Install**
7. When the Licence is listed click **OK**

If you mouse-over any listed licences, the tooltip shows the details of the Licence.

Checking the Licence Details



If you are running the Q2 2019 release of the software (or later) and the application server has an outbound internet connection which can reach the FastStats Licensing Server (<https://licence-service-proxy.licensing.apteco.com/api> on port 443) this manual licence installation process should only need to be carried out once.

Any installed/updated licences performed with the Q2 2019 release (or later) of the FastStats Configurator means future modifications made to the Licence (for example

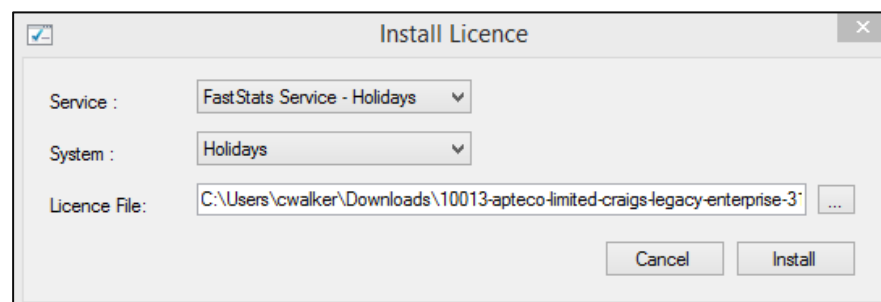
new bundles/modules added, expiry date changes, changes to volume restrictions.) are automatically be picked up without additional work for an administrator.

The **Cache Updated** entry shows the last time that the FastStats Service was able to connect to the FastStats Licensing service and validate the Licence.

If there is an outbound internet connection available, then the Licence is checked each time an administrator goes into the Licensing option and when the FastStats Service restarts.

To install a licence for the first time on systems running a software version before Q2 2019:

1. Run the **FastStats Configurator** on the FastStats application server
2. Choose **FastStats Services**
3. Click **Licensing**
4. Click **Install**
5. Choose the relevant FastStats Service from the **Service** dropdown
6. Choose the relevant system from the **System** dropdown
7. Click the ellipsis button to browse to the licence .xml file
8. Navigate to the location of the stored .xml file and then click **Open**



9. Click **Install**
10. When the Licence is listed click **OK**

3 Adding and Removing Users

3.1 Adding Users to a Licence

The Administrative Functions in FastStats allow a FastStats administrator to see which software bundles or modules are licensed and which users assigned to these bundles/modules.

The way licensing works is that the Licence allows several named users to access the system.

To see the licence allocations for software version Q1 2019 or later:

1. Log onto FastStats as an administrator with the **Users** Role
2. From the File menu choose **Tools > Administrative Functions > Licences and Bundles**

Licences and Bundles dialogue Licence with Licence ID 10005.

Licences and Bundles

Licence ID	Description	Allocated	Type	Support Slots
10005	VBP Enterprise Test Licence	5	Enterprise	2

Username	Predictor	Orchestrator	Cascade Add	SupportSlot	
Administrator	☐	☐	☐	☒	Remove
cwalker	☐	☐	☐	☒	Remove
nwalker	☒	☒	☐	☐	Remove
rthumwood	☒	☒	☒	☐	Remove
achislett	☒	☒	☐	☐	Remove

Allocated :	3	3	1	2
Limit :				2
Remaining :				0

Close

The summary rows at the bottom show the number of slots **Allocated**, the number **Remaining** and the licence **Limit**.

To add a user to a licence:

From the Users Explorer tab in FastStats, drag the user and drop it on the white gridded area within the **Licences and Bundles** dialogue.

The process is very similar for software versions before Q1 2019.

3.2 Removing Users from a Licence

You may want to remove a user from a licence or assign users to different modules/bundles.

For releases from Q1 2019 onwards:

1. Sign into Apteco FastStats as an Administrative user
2. From the File menu choose **Tools > Administrative Functions > Licences and Bundles**
3. If necessary, click the + next to the **Licence ID** to expand the list of named users
4. Deselect the licence options for the relevant user
5. To remove a user from licensing click the **Remove** button for the relevant username
6. The **Allocated** and **Remaining** figures underneath that bundle column adjusts

Licences and Bundles Dialogue

Licence ID	Description	Allocated	Type	Support Slots
10005	VBP Enterprise Test Licence	5	Enterprise	2

Username	Predictor	Orchestrator	Cascade Add	SupportSlot	
Administrator	☐	☐	☐	☒	Remove
cwalker	☐	☐	☐	☒	Remove
nwalker	☒	☒	☐	☐	Remove
rthumwood	☒	☒	☒	☐	Remove
achislett	☒	☒	☐	☐	Remove
Allocated :	3	3	1	2	
Limit :				2	
Remaining :				0	

Close

For releases before Q1 2019:

1. Sign into FastStats as an Administrative user
2. From the File menu choose **Tools > Administrative Functions > Licences and Modules**
3. If necessary, click the + next to the **Licence ID** to expand the list of named users
4. Deselect the licence options for the relevant user
5. To remove a user from a licence, click the **Remove** button for that username
6. The **Allocated** and **Remaining** figures underneath that bundle column adjusts to reflect any changes

4 Installing an Updated Licence

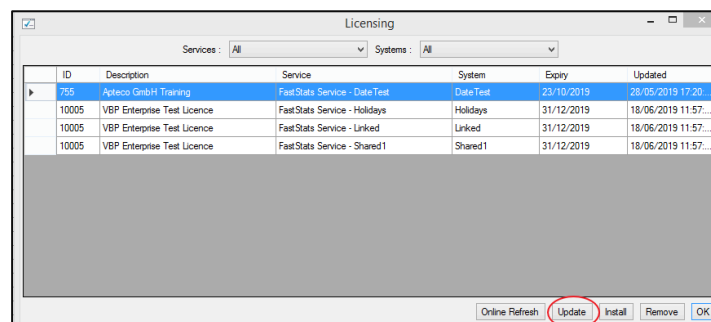
If you have been issued with an updated licence from Apteco, for instance after an annual renewal. In this case, it is advisable not to remove the currently installed Licence before installing the new one. Administrators should instead use the Update option.

Note:

With releases before the Q1 2019 release, removing a licence also removes user configuration settings that you might have specified, for example, the assignment of users to functionality within the software. For systems running the Q1 2019 release or later, you can safely use the Remove option to uninstall an existing licence.

To update a licence file via a supplied .xml file:

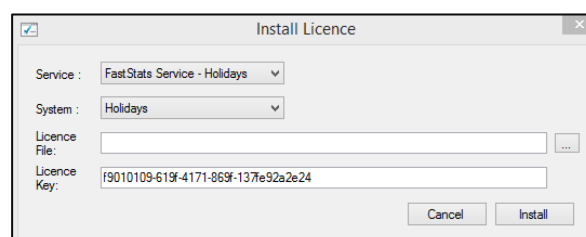
1. Log onto the FastStats application server which runs the FastStats Service(s)
2. Run the **FastStats Configurator**
3. Choose **FastStats Services**
4. Click **Licensing**
5. Highlight the relevant system name
6. Click **Update**



7. Browse to the supplied .xml file and click **Open**
8. The **Updated** date changes to reflect the new Licence
9. Click **OK**

To update a licence via a Licence Key (only with the Q2 2019 release or later) :

1. Log onto the FastStats application server which runs the FastStats Service(s)
2. Run the FastStats Configurator
3. Choose **FastStats Services**
4. Click **Licensing**
5. Highlight the relevant system name
6. Click **Update**
7. Enter the licence key into the **Licence Key** textbox



- Click **Install**
- The added Licence is then listed
- The **Updated** date changes to reflect the new Licence
- Click **OK**

Note:

If you are running the Q2 2019 release of the software (or later) and the application server has an outbound internet connection which can reach the FastStats Licensing Server (<https://licence-service-proxy.licensing.apteco.com/api> on port 443) then this manual licence update process should only need to be carried out once.

Any installed/updated licences performed with the Q2 2019 release (or later) of the FastStats Configurator means future modifications made to the Licence (for example new bundles/modules added, expiry date changes, changes to volume restrictions.) are automatically be picked up without additional work for an administrator.

If you mouse-over any listed licences, the tooltip shows the details of the Licence.

The **Cache Updated** entry shows the last time that the FastStats Service was able to connect to the FastStats Licensing service and validate the Licence.

If there is an outbound internet connection available, then the Licence is checked each time an administrator goes into the Licensing option and when the FastStats Service restarts.

Licence details showing Cache Updated 18/06/2019

The screenshot displays the 'Licensing' window in the PeopleSoft PeopleTools interface. The window has a title bar with standard Windows controls (minimize, maximize, close) and a menu icon. Below the title bar, there are two dropdown menus: 'Services : All' and 'Systems : All'. The main area contains a table with the following columns: ID, Description, Service, System, Expiry, and Updated. The table lists several licenses, with the one having ID '10005' and Description 'VBP Enterprise Test Licence' selected. A context menu is open over this selected row, displaying detailed information about the license, including its ID, key, company name, description, distributor, expiry date, type, active status, and various limits. At the bottom of the context menu are buttons for 'Online Refresh', 'Update', 'Install', 'Remove', and 'OK'.

ID	Description	Service	System	Expiry	Updated
755	Apteco GmbH Training	FastStats Service - DateTest	DateTest	23/10/2019	28/05/2019 17:20:...
10005	VBP Enterprise Test Licence	FastStats Service - Holidays	Holidays	31/12/2019	18/06/2019 11:57:...
10005	VBP Enterprise Test Licence	FastStats Service - Linked	Linked	31/12/2019	18/06/2019 11:57:...
10005	VBP Enterprise Test Licence	FastStats Service - Shared1	Shared1	31/12/2019	18/06/2019 11:57:...

Context Menu Details:

- License Id: 10005
- License Key: f593****_****_****_****_****c66d
- Company Name: Apteco Limited
- Description: VBP Enterprise Test Licence
- Distributor: Apteco Ltd
- Expiry Date: 31/12/2019
- License Type: Enterprise
- Active: Active
- Status: Production
- Sizing Method: MaximumPeople
- Max FastStats Rows: 100,000,000
- Max PeopleStage Rows: 7,000,000
- Bundle Predictor: Unlimited
- Bundle Orchestrator: Unlimited
- Bundle Cascade Add-On: Unlimited
- Cache Updated: 18/06/2019 11:57:25

Buttons: Online Refresh, Update, Install, Remove, OK

You can force contacting the licensing server to update the licence details by clicking the **Online Refresh** button.

IMPORTANT

If you are updating a licence with a reduced number of users, then you should reduce the allocations within the FastStats Administrative tools before you update the Licence.

5 Administering Partner Licences if Applicable

5.1 Enabling Admin users on a Production System

The partner licence is for non-production use only, demos, administration.

We are moving away from issuing partner licences in favour of support slots on versions of the software from Q2 19 onwards. If there is a requirement to continue to issue a Partner licence, we will assess each request individually.

Any previous instances of the Holidays system you had for demos we have made the process easier for you. We can provide you with a fully licenced, full functionality Amazon Web Services instance of your own Holidays demo system. This system is configured with FastStats, PeopleStage and Orbit and you can add training users to conduct training sessions to these systems if required.

If we do issue you with a Partner licence it will be at a reduced count of 100,000 records. This has caused failures in some systems to start by exceeding the licence count as it is choosing the wrong Licence to start the system.

We now issue lower volume licences to allow partners to add administrative users to systems, but these licences must not be used to build systems or to run production FastStats systems, as the database volume restricted to 100k records. This volume does not affect the user's ability to administer high volume systems.

6 Licence Caching

The changes to licensing introduced in the Q3 2019 release introduced the concept of Licence caching. Licence caching controls how regularly FastStats checks the validity of the licences applied to your FastStats systems.

If you have an outbound internet connection and can reach the Apteco licensing server (<https://licence-service-proxy.licensing.apteco.com/api> on port 443), then the licensing periodically checks with Apteco and maintains a cached version of the Licence.

Each Licence has a cache period determined within it (for example 2 months). The cached value specifies the maximum duration the system can run without having had a successful licence validation check. If the FastStats Service has not detected a valid cached licence within this period, then warnings are reported in the FastStats Service log file. There is a grace period of 2 weeks. If the system does not get a cache update within this grace period, then the FastStats prevents the Service starting and reports this in the FastStats Service log file.

When is the Licence Cache updated?

FastStats attempts to refresh its licence cache when:

- An administrator clicks the Licensing button within the FastStats Configurator
- The FastStats Service restarts
- You deploy a new FastStats system and the FastStats Service restarts
- You run a FastStats Designer build with the Licence in question.
- An Apteco Marketing Suite client (FastStats, PeopleStage, Orbit) attempts a login.

Note:

The Apteco Marketing Suite client only attempts to refresh the licence cache if it has been more than 12 hours since the licence cache was last updated. In this case, it contacts the Apteco Licensing server from the Web Server rather than the application server.

6.1 What if the application server has no outbound internet connection?

You can set up the Apteco Marketing Suite software in a configuration where the application server does not have an outbound internet connection.

Note:

We recommend you avoid this method as it means that there is more manual processing involved in installing and managing your FastStats licences.

6.1.1 Connection via the Web Server

If the FastStats setup has a separate web server which hosts the FastStats WebService and this can reach the Apteco licensing server (<https://licence-service->

proxy.licensing.apteco.com/api on port 443), then it is still possible for the cached Licence to be updated and for Apteco to receive licence usage information.

As described in the section *Licence Caching*, the licence cache is updated when users attempt to log into one of the Apteco Marketing Suite clients (FastStats, PeopleStage, Orbit).

In this scenario (application server does not have internet, but the web server does have access) then the original installation of a licence requires you to have the Licence .lic.xml file supplied via the Apteco administration team, i.e. you cannot install a licence by providing the Licence Key only. If you have the .lic.xml file then you can put this onto the application server, choose the **Licensing** option in the FastStats Configurator, click **Install** and navigate to the supplied .lic.xml file in the traditional manner.

6.2 Application Server and Web Server have no Outbound Connection

In the scenario where both the application server and web server cannot reach the Apteco licensing server (i.e. there is no outbound connection to (<https://licence-service-proxy.licensing.apteco.com/api> on port 443) then the FastStats administrator must manually administer the licences of your FastStats system(s).

The Apteco administration team must supply licence files (.lic.xml files) periodically as determined by the Cache Duration within your Licence (i.e. if the CacheDuration value is 2 months then you need to obtain licence files every 2 months). The licences must be updated via the FastStats Configurator manually.

The administrator must also periodically supply Apteco with licensing usage data.

See section [Manually Managing the Usage Data](#) for further information on this.

6.3 Licence Usage

One of the improvements to the Licensing work introduced in the Q3 2019 release is that Apteco can now automatically capture usage information for each system.

We automatically send Usage information to Apteco on two types of event:

1. FastStats32Service startup - whenever the FastStats Service restarts
2. PeopleStageStart – when an FS Service restarts that contains a PeopleStage configuration, database connection strings.

The usage information is stored within the web service control database within the LicenceUsage table.

When the usage information is successfully submitted to Apteco then those LicenceUsage records are removed from the LicenceUsage table.

The above example shows two usage entries for the Holidays system with Licence Id 3010012:

	Id	UsageData	DateCaptured	LicenceId	SystemName
1	8	{"UsageDataJson":"","Id":8,"LicenceId":"3010012","Syst...	2019-10-16 09:44:00.0000000	3010012	holidays
2	9	{"UsageDataJson":"","Id":9,"LicenceId":"3010012","Syst...	2019-10-16 13:11:55.0000000	3010012	holidays

The UsageData is a json representation of the usage data collected for that system.

6.3.1 Usage Data - What usage information do we capture?

For a PeopleStageStart Event, we capture the following information:

LicenceId of 3010012

SystemName is hashed f3871f925c53c3a43248571014758a812b406bfb

EventName of PeopleStageStart

HardwareId shows a hashed hardwareId of the application server (my machine in this example)

FastStatsRecords which is set to null (this is not captured on a PeopleStageStart event)

PeopleStageRecords set to 2924293 in my case

DateCaptured is 2019-10-16T09:44:00Z

UsageJsonSignature – a signature of the Usage entry to prevent it being tampered with.

PreviousRecordJsonSignature is set to null – (this is used to check discrepancies between the UsageJsonSignature of the last time we captured it and to guard against it being tampered with. It also guards against Usage records being removed from the LicenceUsage table)

For a FastStats32ServiceStart event we capture the following information:

Same as PeopleStageStart event with LicenceId, SystemName hashed, HardwareId, DateCaptured, PreviousJsonSignature, UsageJsonSignature

EventName of FastStats32ServiceStart

FastStatsRecord is number of records in People table. 1156533 in my case.

PeopleStageRecords is null because we don't check for this for this event.

UserId 2 in this case. This is the UserId as shown in the Users table for this user.

Username: hashed username e.g. 8ec410a5ed54bfe4e0898df6ec9dc3802fb05ae9

Email: hashed email address e.g. 5f06da074f2e9b48f2d1565484eb8fd9e26bf768

BundleInstances: [1002, 1005] contains the Bundle IDs of any bundles for which that user is assigned.

If a connection to the licensing server is established, then the usage data is sent before the generation of the CDS files during the FastStats Service start-up:

This is reported in the FastStats Service log file as:

16/10/2019 14:37:24	Verbose	holidays			FastStatsJob	0	295,749	696,452		Integrity Check : Variable reference check OK.
16/10/2019 14:37:24	Verbose				Send Licence Usage ...		295,941	697,128		LicenceManager: Begin sending licence usage records
16/10/2019 14:37:25	Verbose				Service		296,325	697,204		LicenceManager: Finished sending licence usage records

If a connection to our licensing server cannot be established, then the FastStats Service will show a warning like this on start-up:

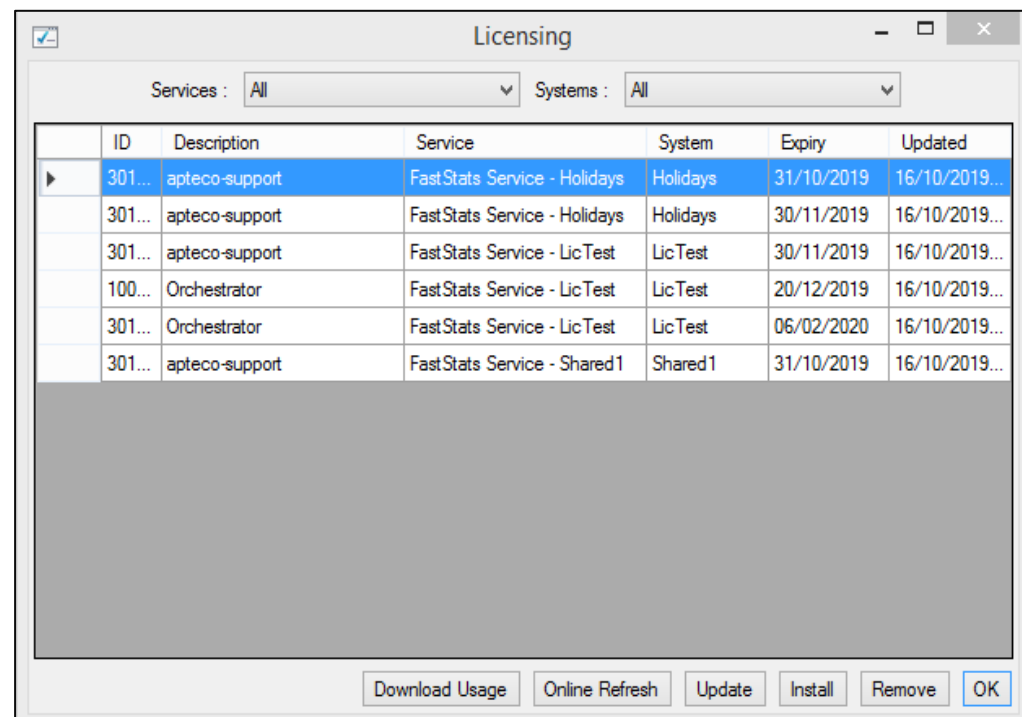
Startup	38,470	360,896		The Cascade database is 5,656 Kb in size
Service	39,958	360,968		Licence Manager: Retrieved 2 licences from the cache
Service	41,484	361,076		Licence Manager:Error refreshing licences for holidays with exception An error occured while sending the request.
Service	41,604	361,076		Licence Manager: System .Net. Http.HttpRequestException: An error occurred while sending the request. --> System.Net.WebException: The remote name could not be resolved: "licence-service-proxy.licensingtest.apteco.com. bbroken"
Service	41,708	361,076		Licence Manager: Refreshed 0 licences from the licence service
Service	41,788	361,076		Licence Manager: Found active registered licence: (3010012) apteco-support

6.3.2 Manually Managing the Usage Data

In the scenario where neither the application server nor the web server has the ability to reach the Apteco licensing server (i.e. there is no outbound connection to (<https://licence-service-proxy.licensing.apteco.com/api> on port 443) then the FastStats administrator must manually supply the usage data in accordance with the cache period for that Licence (typically every 2 months).

The Licensing tab in the FastStats Configurator contains a manual option to download usage data named **Download Usage**

Licensing dialogue



The **Download Usage** button downloads a zipped copy of the usage data (a .json file).

Email the usage file to <mailto:licensing@apteco.com>. It would help if the subject stated 'Usage data for licence <licence ID>' where <licence ID> is the ID of the Licence for which the usage data has been collected.

Upon receipt of this usage data, the Apteco administration team will manually upload the usage data and re-supply a new .lic.xml file. This resupplied licence file will contain a new CacheUntilDate and will, therefore, reset the period for which we need to collect usage information from this system.

7 Licensing in FastStats Designer

In order to install a licence for use with FastStats Designer:

- Open the design in FastStats Designer
- Click on System Configuration
- Click the Licence tab

If you have been supplied with a lic.xml file then click the **Licence File** radio button and use the **Browse** button to browse to the file.

The details of the Licence should be shown in the Licence Details section:

The screenshot shows the 'Licence' tab in the FastStats Designer interface. The left-hand panel has 'System Configuration' selected. The main area has tabs for 'View', 'Build', 'Extract', 'Licence' (active), 'Advanced', 'Environment', 'Notes', and 'Credentials'. Below the tabs, a message states: 'A licence can be specified either by a file or by entering a Licence Key :'. There are two radio buttons: 'Licence File' (selected) and 'Licence Key'. The 'Licence File' button is followed by a text box containing 'D:\FastStats\Licences\10003-apteco-ltd-broadcaster-20122019.lic.xml' and a 'Browse' button. The 'Licence Key' button is followed by a text box with asterisks and a 'Check' button. Below this, the 'Licence Details' section is displayed as a table:

Licence Details	
Type	Enterprise
Id	10003
Method	People based
Company	Apteco Ltd
Distributor	Apteco Ltd
Size restriction	10,000,000 record(s)
Expiry date	20/12/2019

Alternatively, if you have been supplied a licence key then tick the **Licence Key** radio button and enter the supplied key in the textbox.

If you use a Licence Key then the build server will need access to Apteco's licensing server (<https://licence-service-proxy.licensing.apteco.com/api> on port 443).

Note:

The Q1 2020 release of FastStats Designer no longer requires a valid licence in order to build a FastStats system. Instead, the licensing validation is handled by the FastStats Service during deployment. From the Q1 2020 release and in later releases, the only requirement for specifying details of a licence file on the **Licence** tab within FastStats Designer is if the administrator wishes to open the built system in FastStats Local in order to check it. If you do use the **FastStats System > Open System in FastStats** option to check your builds then Apteco recommends that you still specify a valid licence file in FastStats Designer.

If your system is using a people-based licence, you will need to designate which table is the people table for licensing purposes. To do this:

1. Open the design in FastStats Designer
2. Click on **Table Relationships** in the left-hand panel
3. Right-click on the relevant table header and choose **Properties**

The screenshot shows a dialog box titled "Properties for table Accounts". It contains the following settings:

- Build Options:**
 - ☒ Include in build
 - ☒ Run auto discovery
 - ☐ Use parallel build process
 - ☐ Auto exclude if no data found
- Table Options:**
 - ☒ Master table
 - ☐ Default table
 - ☒ People table (Licensing)
 - ☐ Contact table (PeopleStage)
 - ☐ Response table (PeopleStage)
- Descriptions:**
 - Singular Display Name : Accounts
 - Plural Display Name : Accounts

Buttons: OK, Cancel

4. Select the **People table (Licensing)** option
5. If you are using PeopleStage with this system then tick the **Contact table (PeopleStage)** as well.
6. Click **OK**

Appendix A: Changes to Licensing

The Q3 2019 release introduced checks for the number of unique reference numbers contained within the StateHistory table of the PeopleStage database.

A query runs whenever the FastStats service restarts to check the number of distinct AgentURNs in the StateHistory table.

If this query returns a higher value than the Number of PeopleStage records stated in the Licence, then the following warning is shown in the FastStats Service log at start-up:

Error	Service	188,584	733,360	PeopleStage licence has been exceeded: the licence is for 250,000 records and we now have 2,924,293 unique records in the StateHistory table
Verbose	Service	188,696	733,372	Sending Email

Note:

It is worth ensuring you add the latest default templates to the Email Templates within the FastStats Service configuration. The Q3 2019 release introduced a 'licence_alert.txt' file which is used to inform the administrator of issues with licensing.

If the emails have been configured in the FastStats Service and the default templates have been added, then the administrator will receive an email informing them that the PeopleStage record limit has been exceeded.

To add the default templates:

- (1) Run the **FastStats Configurator**
- (2) Choose **FastStats Services**
- (3) Highlight the relevant system and click **Properties**
- (4) Click the system name tab across the top
- (5) Click **Emails** in the left-hand panel
- (6) Click **Add Default Templates**

Appendix B:Troubleshooting

B.1 User Not Licensed Error

The example below shows three users added to the list of named users.

Licences and Bundles									
Licence ID	Description	Allocated		Type					
1701	Jon Test Licence 2	3		Enterprise					
Username	Base	Mapping	Cascade	DiscovererM	WebLinkPro	ExcelsiorDeveloper	ExcelsiorViewer		
Administrator	☒	☐	☐	☐	☐	☐	☐	Remove	
User 3	☒	☒	☒	☒	☒	☒	☒	Remove	
User 4	☒	☒	☐	☐	☐	☐	☐	Remove	
Allocated :		3	2	1	1	1	1		
Limit :		5	2	1	1	1	1		
Remaining :		2	0	0	0	0	0		

If a fourth user tried to log into the system at this point, then they would receive a Base module not licensed message.

Login credentials

Username:

JohnDoe

Password:

Add new user...

Reset password...

System:

Holidays

Base module not licensed

Login

Options >>

Enterprise

Local

To allow this user to log on, the Administrator would need to:

- Choose **Administrative Functions > Licences and Bundles** from the Tools menu
- If necessary, click the + next to the Licence to expand the list of named users
- Untick the licence options for one of the existing users
- Drag and drop the new user from the **Users Explorer** onto the white area of the **Licences and Bundles** dialogue

Licence ID	Description	Allocated	Type
1701	Jon Test Licence 2	4	Enterprise

Username	Base	Mapping	Cascade	DiscovererM	WebLinkPro	ExcelsiorDev	ExcelsiorVie	
Administrator	☒	☐	☐	☐	☐	☐	☐	Remove
User 3	☒	☒	☒	☒	☒	☒	☒	Remove
User 4	☒	☒	☐	☐	☐	☐	☐	Remove
JohnDoe	☒	☒	☒	☒	☒	☒	☒	Remove
Allocated :		4	2	1	1	1	1	
Limit :		5	2	1	1	1	1	
Remaining :		1	0	0	0	0	0	

7. Click **Close** when finished

B.2 Error Caused by Different Versions of FastStats

If the FastStats application server is running multiple FastStats Services with the Q2 2019 release (or later), then it is important that each system is using the same version of the FastStats Web Service and that the Web Service control databases are all up to date.

Clicking the Licensing option within the FastStats Services section of the FastStats Configurator forces the FastStats Configurator to check all the Web Service control databases referenced in the Web Service configuration.

Any databases which do not contain the new licensing tables display on a pop-up dialogue box.

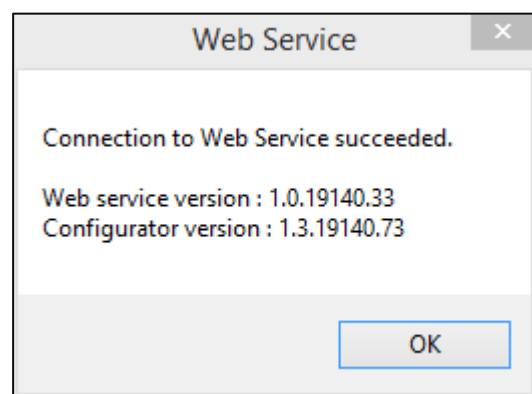
A typical error might be:

LicenceManager: Error retrieving licences for <system name> with exception Invalid object name: LicensedSystems

To resolve these issues, you must use the Database Management section of the FastStats Configurator to run the update database scripts for any systems reporting errors.

To check the version of the FastStats Web Service:

11. Run the **FastStats Configurator** on the application server
12. Choose **FastStats Services**
13. Highlight the relevant system and click **Properties**
14. Click the system name tab
15. Click **Web Server** in the left-hand panel
16. Click the **Test** button



B.3 System Startup reports “Number of records exceeded”

If a partner/admin licence has been applied to a system and updated you need to check it appears last in the sequence.

Example

Licences previously applied to the FastStats service in the following sequence

Licence Number	Licence Type	Volume
123	Partner Licence	Unlimited
786	Enterprise Licence	5 million

The Enterprise licence should also be used to build the system in FastStats Designer, and this is limited to 5 million records using the enterprise licence in this example.

Once the 5 million FastStats System is built and deployed, the unlimited partner licence is chosen as it was the first one added to the service and the service starts.

With the new partner licence set to a lower limit, you must ensure this **is not chosen**. In this example the 100k Licence is updated, and therefore the start-up sequence is as follows

Licence Number	Licence Type	Volume
123	Partner Licence	100k
786	Enterprise Licence	5 million

Note:

This time once the 5 million System deploys the 100k Partner licence is chosen as it is the first one in the sequence and the service **fails** to start.

To avoid this correctly apply a renewed partner licence is as follows.

1. Remove the existing partner licence from the Service
2. Add the new partner licence to the Service
3. Activate the new Licence as the existing activation response is discarded after the removal
4. A prompt shows that the Licence needs activating by a certain date
5. If the Licence shows as active, you can safely ignore the activation date
6. The activation is a one-off action.
7. Log into FastStats and use **File > Administrative Tools > Licences and Modules** to drag the partner support, admin users, back onto the partner licence
8. Confirm that the licences are in this sequence.

Licence Number	Licence Type	Volume
786	Enterprise Licence	5 million
123	Partner Licence	100k

9. Restart the FastStats service. The Service starts and chooses the 5 million production licence to start the service as it is now first in the list.

For customer service and technical support visit:

www.apteco.com/support

T: +44 (0)1926 407 595 (Support Desk)

Note: If you have purchased the Apteco Marketing Suite™ via one of our partners then they are your first line of support.

Apteco GmbH

Schaumainkai 87
60596 Frankfurt am Main
Germany
T: +49 (0) 69 25 66 97 0 – 0
support@apteco.de
www.apteco.de

Apteco Australia Pty Ltd

Level 2
99 Macquarie Street
Sydney NSW 2000
Australia
T: +61 (0) 2 8355 2524
www.apteco.com.au

Apteco Benelux

Stationsplein 45, Unit 4.004
3013 AK, Rotterdam
The Netherlands
T: +31 (0) 10 80 80 875
Email: support@apteco.nl
www.apteco.nl

Head Office

Apteco UK

Tink-a-Tank House
21 Jury Street
Warwick
CV34 4EH, UK

T: +44 (0) 1926 407565
E: support@apteco.com
W: www.apteco.com

© 2020 Apteco Ltd. All rights reserved.

This publication is for informational purposes only. While every effort has been made to ensure accuracy, this publication shall not be read to include any warranty or guarantee, express or implied, including about the products or services described or their use or applicability.

Apteco Ltd. reserves the right to modify or improve the designs or specifications of its solutions at any time without notice.



Apteco

Apteco

INSIGHT INTO ACTION