IBM i License Transfer Configuration and FAQ

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About this document

This document was written to help IBM and business partner sellers with configuring and ordering IBM i operating system entitlement transfers from one machine to another. It is divided into two major sections: configuration guidance and frequently asked questions. "Transfer" in this context means **permanent** transfer of the IBM i entitlements, not the temporary transfer of IBM i entitlements from a primary system to a machine with an IBM i Capacity Backup (CBU) feature, or between machines in Power Enterprise Pools or using Live Partition Mobility. If you have not already done so, please first read **the *IBM i Processor and User Transfer*** guide for a full explanation of the terms and conditions of IBM i entitlement transfer. The latest version of the *IBM i Processor and User Transfer* guide can be found on the web site "Planning - Customer Notices and Information" at http://www.ibm.com/systems/support/planning/ibmi_license.html. Refer to the section “IBM i Processor and User Transfer.”

This document combines and replaces *Frequently Asked Questions on IBM i Entitlement Transfer* and *Transferring IBM i Within PureFlex and Flex Initial Order Configurations*, and also includes IBM i license transfer configuration advice formerly found in the *Entitled Software Support (ESS) IBM i Ordering, Keys & Entitlement Scenarios Guide* (which is no longer being updated).

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Introduction

The ability to transfer IBM i operating system entitlements between machines in an enterprise has been very popular with customers since it was announced in 2010. However the process for transferring operating system entitlements is more involved than transferring other licensed programs, and the process owners have seen a number of orders with problems that could have been avoided. To help your customer's IBM i entitlement transfer go smoothly, make sure that you understand the terms and conditions and verify that all eligibility requirements are met before you propose IBM i entitlement transfer. Refer to the *IBM i Processor and User Transfer* guide found on the web site "Planning - Customer Notices and Information" at http://www.ibm.com/systems/support/planning/ibmi_license.html for more information.

IBM i entitlement transfer involves two machines which play distinct roles in the transfer process, and they are often referred to by different names in various process documents and tools. The machine which will give up IBM i license entitlements may be called the "from" system, the "base" system or the "donor" system. The machine to which the entitlements are transferred may be called the "to" system, the "receiving" system, the "proposed" system, the "target" system, the "new" system or the "replacement" system. Part of the confusion in terminology stems from the fact that you can transfer entitlements to *either* a system that already exists, i.e. that already has a serial number, *or* to a machine that is being ordered new from the plant and won't have a serial number until one is assigned during the manufacturing process. There are also some differences in configuration steps and other nuances depending on whether or not the target machine already has a serial number. **In this document, we will refer to the machine giving up IBM i license entitlements as the "donor machine," and to the machine receiving the IBM i license entitlements as either the "existing target machine" or the "new target machine." Also note "machine" can mean either a stand-alone Power server or a PureFlex, Flex or PurePower System S822 Power compute node.**

Another frequent point of confusion is the difference between the **License Management System (LMS)** and the **Entitled Systems Support (ESS)** web site. LMS is a worldwide IBM system that (among other functions) stores software entitlement records and manages software license keys for a variety of IBM software products. ESS is the user interface to LMS that customers, business partners and IBMers can use to view entitlement data stored in LMS and also access a number of software-related functions. There is a World Wide Customer Support help desk available for users of ESS; this help function is most commonly referred to as the **Key Center**.

Placing orders for IBM i entitlement transfer initiates a multistep process. In addition to the orders, there are actions that must be taken on both the donor machine and the target machine to complete the transfer. Failure to complete **all** of the transfer steps will cause problems with future software orders for one or both machines involved. See the *IBM i Processor and User Transfer* guide for a description of the complete process.

When you transfer IBM i software entitlements (or other licensed programs) from one machine to another, concurrent use of the software licenses on both machines is limited to 15 days. If you are transferring IBM i entitlements to a new target machine, the 15-day period begins when an IPL of IBM i is performed for the first time in any partition on the new machine. If you are transferring IBM i entitlements to an existing target machine, the 15-day period begins as soon as you begin migrating IBM i workload from the donor machine to the target machine; any testing on the target machine prior to actual workload movement counts as migration activities included in the 15-day period. If you need

additional time to complete the migration, temporary software licensing is required. See the topic "Temporary Licensing" for more information.

Configuring IBM i license transfer

The configuration guidance and examples in this document assume that you already know how to use the IBM Configurator for e-business (e-config) and just need to understand how to configure IBM i license transfer. Only selected screens are shown in the examples. If you need help with e-config basics, visit the IBM Configurator Community web site at https://www-304.ibm.com/connections/communities/service/html/communityview?communityUuid=a9008810-00fc-47f9-99e6-f8249bd6187a and click on the Education tab.

While IBM i license transfer terms and conditions and eligibility requirements apply worldwide and e-config implementation is consistent, inventory retrieval steps and ordering tools vary from country to country. You may need to adapt the general guidance in this document for your specific country processes.

Order components and e-config paths

IBM i entitlement transfer requires that three specific program identifiers (PIDs) be ordered (at a minimum). These orders can either be a stand-alone software transaction or combined with an order for a new machine. In either case, **all license transfer orders are placed against the system type/number of the target machine**. No orders are placed against the donor machine system type/number. The following three PIDs need to be ordered:

- **5733-NKY** specifies the quantity of processors, users and/or Application Server processors that are to be transferred from the donor machine to the target machine; it also has features which identify the machine type, plant of manufacture code and serial number of the donor machine. This order updates the LMS entitlement records by moving the existing processor, user and/or Application Server processor entitlements from the donor serial number to the target serial number and creating new reduced-quantity keys for the donor machine and new increased-quantity keys for the target machine. The increased-quantity keys are not activated or available to users in ESS until the Key Center receives proof that the reduced-quantity keys have been installed on the donor machine.

- **5722/5761/5770-SS1** shows the quantity of processors, users and/or Application Server processors that are being transferred to the target machine, bills for the license transfer charges and ships the license transfer document. If the entitlements are being transferred to an existing target machine, this order will have features which identify the machine type, plant of manufacture code and serial number of the target machine. If the entitlements are being transferred to a brand new machine, LMS will determine the machine type, plant of manufacture code and serial number of the new machine by linking the type/system number of the order.

- **5733-SPP** creates the software maintenance (SWMA) registration for the transferred processor or Application Server processor entitlements. For each IBM i processor entitlement transferred, one year of software maintenance with 9x5 support is included. Additional years of coverage and/or 24x7 support are available on most models for an extra charge. If you increase coverage

to three years, you will get 5733-SPE and 5733-SP3 instead of 5733-SPP. SWMA is not included if you are only transferring user entitlements.

There are three ways the necessary PID orders can be generated in e-config; the method to use depends on your specific situation:

The **Software Only path** is used to transfer entitlements from an existing machine to another existing machine. The Software Only path can be used for transfers from and to stand-alone Power servers, PureFlex, Flex or PurePower System S822 Power compute nodes. You must specify the serial numbers for both machines.

The **NEWSYS path** is used when you are configuring a new machine to replace an existing machine and you want to transfer software entitlements from the existing machine to the new machine. In the NEWSYS path, the base (donor) system can be a stand-alone Power server or a PureFlex, Flex or PurePower System S822 Power compute node, but the replacement (target) machine can only be a stand-alone Power server -- you cannot configure a new PurePower System or a new PureFlex or Flex Power compute node in the NEWSYS path. You only need to specify the serial number of the donor machine; the serial number of the target machine will be assigned by manufacturing when the orders are placed.

The **Initial Order path** only allows IBM i license transfer when configuring new PureFlex or Flex Power compute nodes or a PurePower System with an S822 node. The donor machine can be a stand-alone Power server or another PureFlex, Flex or PurePower System S822 Power compute node. No base inventory records for the donor machine are retrieved, however you must enter the donor machine's serial number. In the Initial Order path you can only transfer IBM i processor or user entitlements, not IBM i optional features or other licensed programs. To transfer IBM i optional features or other licensed programs to your new PureFlex, Flex or PurePower System S822 Power compute node, you need to do a second configuration using the Software Only path once the serial number of the new Power compute node is known.

To recap: if your target machine is a stand-alone Power server, you can use either the Software Only path or the NEWSYS path in e-config. If your target machine is a PureFlex, Flex or PurePower System S822 Power compute node, you can use either the Software Only path or the Initial Order path in e-config.

Start by verifying IBM i entitlement records

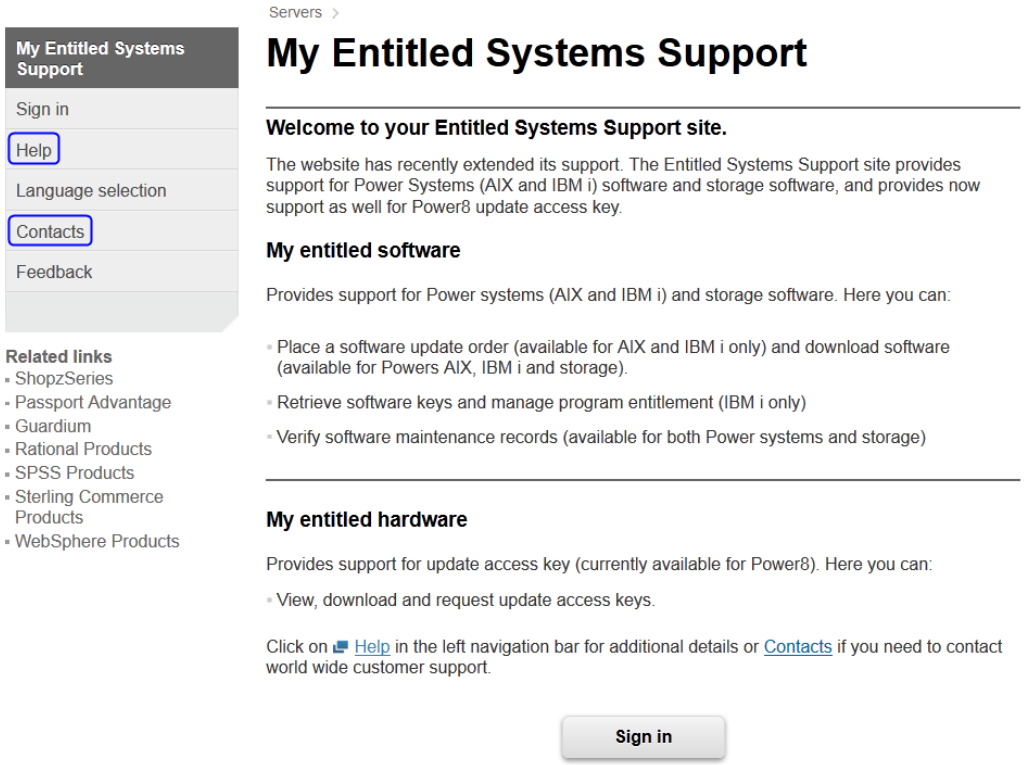
The 5733-NKY order specifying the entitlements to be transferred between the donor and target machines is processed based on **electronic Proof of Entitlement (ePOE)** records stored in LMS**.** ePOEs are created from software orders. As we have all experienced, orders can go wrong. Therefore it is vital that you verify the accuracy of the ePOEs for your existing machine(s) before beginning your configuration.

If you are configuring for a customer in a country where Inventory Services is available, you can verify IBM i software entitlement through Inventory Services. Inventory Services retrieves IBM i family software entitlement information from LMS.

If you are configuring for a customer in a country where Inventory Services is not yet available, and thus the IBM i software entitlements for a base system in e-config will come from your country inventory, it is very important that you verify the LMS entitlement records directly using ESS before configuring IBM i

license transfer. The 5733-NKY order is processed based on LMS records, **not** country inventory, so if there is a discrepancy between LMS and your country inventory, you need to resolve the problem before proceeding with your configuration.

You can view ePOE records in LMS using the ESS web site at http://www-304.ibm.com/servers/eserver/ess/OpenServlet.wss. If you have never used ESS before or need help, click on Help on the left navigation bar of the ESS Welcome screen to access topic-specific help. For further assistance you can contact the Key Center by selecting Contacts and choosing the customer support center contacts for your country or region. Business partners may need to be authorized to view a customer's records.



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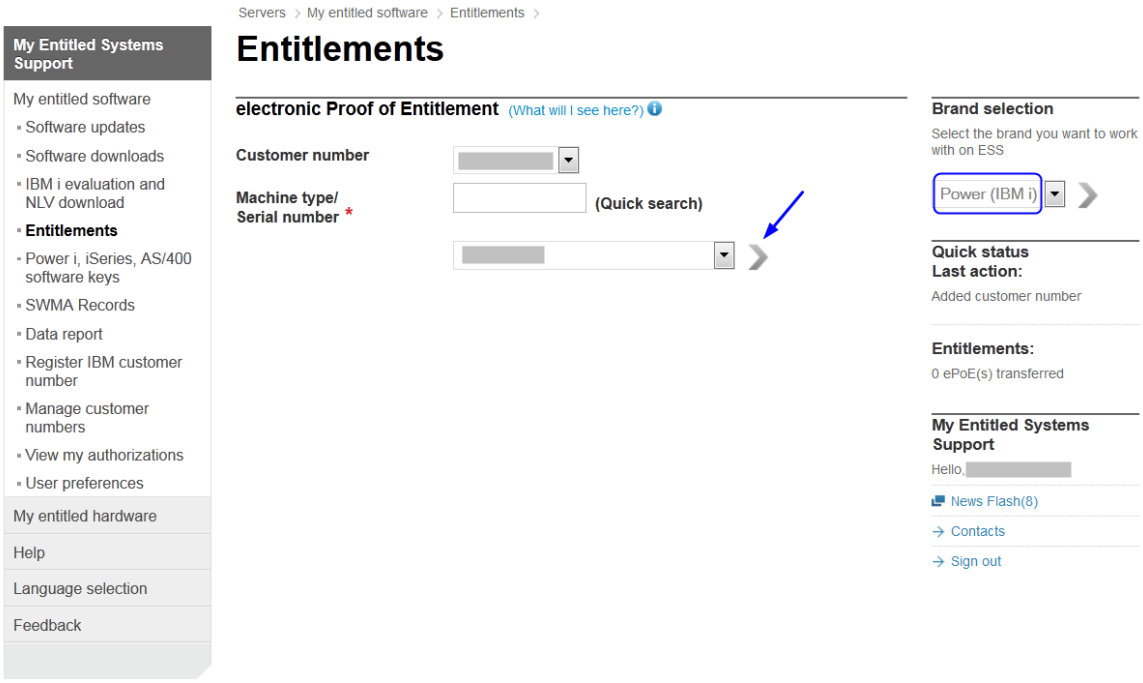
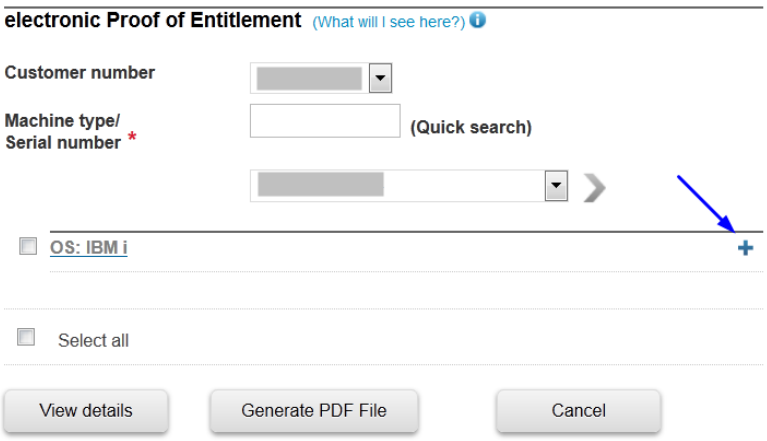
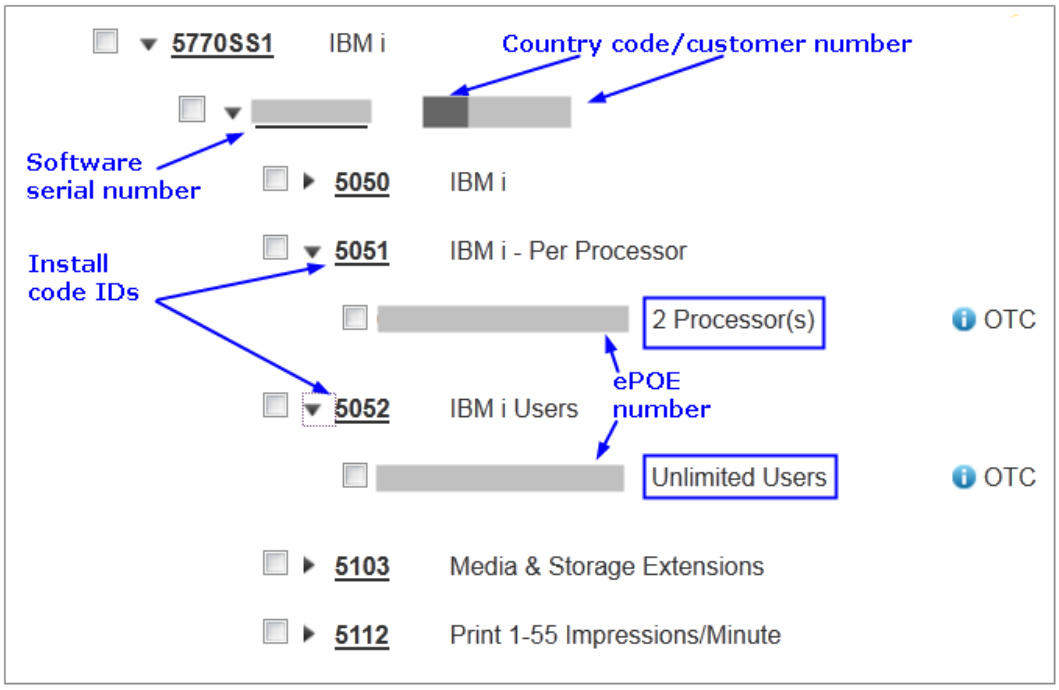
To look up IBM i entitlements in ESS, sign in and select "My entitled software." If you have not previously registered the machine serial or customer number for the software entitlements in your ESS profile, first choose "Register IBM customer number" to complete the required registration. Otherwise make sure "Brand selection" on the upper right side of the screen is set to "Power (IBM i)" and then choose the option for "Entitlements" from the menu on the left. Select the desired customer number and machine serial from the pull down list boxes or enter the machine serial number for the donor or existing target machine in the Quick search box. Then click on the ">" symbol to initiate the entitlement retrieval.



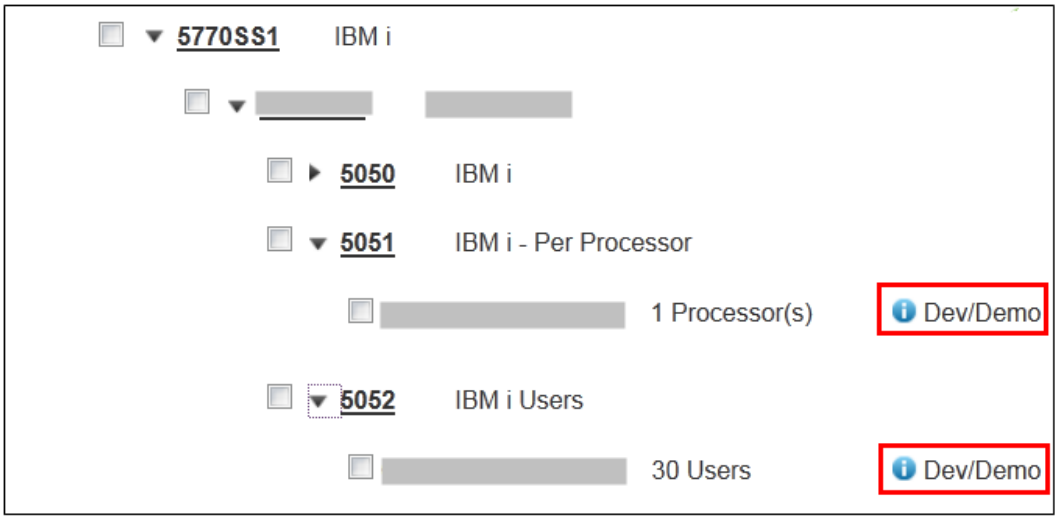
On the resulting screen, click on the "+" sign next to "OS: IBM i" to expand the list of IBM i entitlements.



Scroll down the list of entitlements and expand the entry for 57xx-SS1. The example below gives you an idea of how the information is displayed in ESS. If orders for processors, users or optional features were placed at different times, you may see more than one software serial number under the 57xx-SS1 entry. Verify that the total quantities for IBM i processor (install code id 5051), user (install code id 5052) and/or Application Server processor (install code id 5053) entitlements are what you expect.



Note 1: IBM i processor and user entitlements on machines acquired through the **ISV Development/Demonstration program** cannot be transferred to any other machine. These entitlements will show 57xx-SS1 feature code 6485 when retrieved through Inventory Services. In ESS, they can be identified as shown below:



Note 2: When an IBM i license transfer order is processed, the entitlements transferred to the target machine are placed in a special status in LMS called **"parked."** The Key Center will not make the entitlements available for use until they receive confirmation that the reduced-quantity key has been entered on the donor machine. **If you have parked entitlements on your prospective donor or target**

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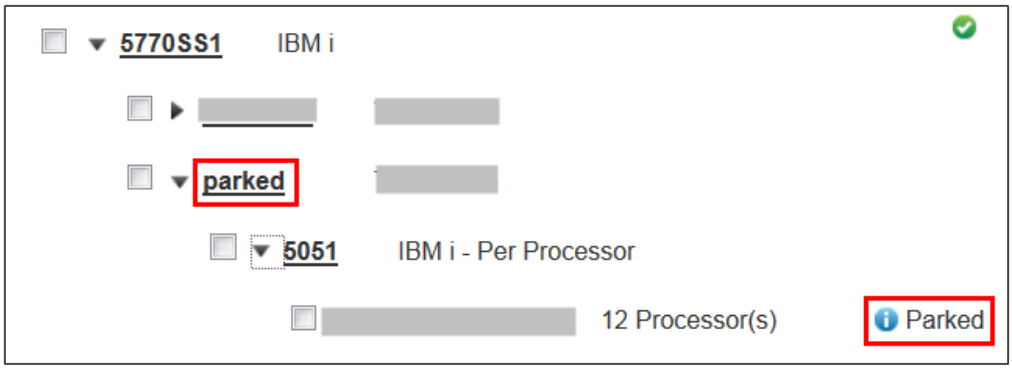
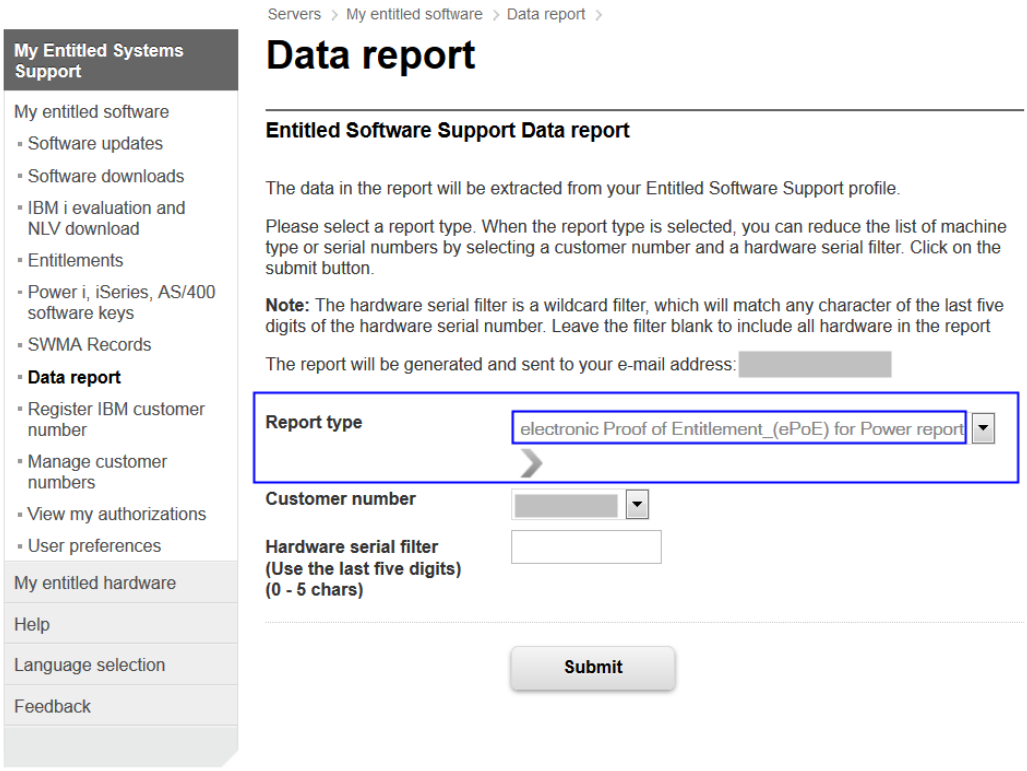
machine, you need to complete the pending IBM i license transfer before initiating a new one. Parked entitlements are identified in ESS as shown below. Note that for parked entitlements to be visible to ESS users, the customer number used for the license transfer order and the customer number of the machine's 57xx-SS1 entitlement must either be the same or, if the customer numbers are different, they must be linked via affiliate number. The affiliate number option is not yet available for all countries but will be rolled out over time. A second caveat is that presently there is no indication in Inventory Services that a machine has parked entitlements when inventory records are retrieved. So if you don't know the history of the machine well you should check ESS for parked entitlements, and if you suspect there are some but you don't see them contact the Key Center or the Power Systems Software Compliance and Entitlement Support team for assistance.



An alternative method of checking IBM i software entitlements in ESS is to choose "Data report" from the menu and select the "electronic Proof of Entitlement_(ePoE) for Power report." You can run the report for a specific machine, all machines in a customer number, or all customer numbers in your profile. Note that parked entitlements do not show up on this report.



Once generated, the "electronic Proof of Entitlement_(ePoE) for Power report" is sent to your email address. The report is in comma separated values (csv) format and can be opened using a spreadsheet editor. The "details" column shows the number of IBM i entitlements (note some information has been omitted from the report to enhance readability below):

MT	SN	SYSTEM_TYPE	SYSTEM_NUMBER	PID_TYPE	PID	CODE_INSTALL	TITLE	DETAILS	VERSION	COUNTRY	CTY	CUSTOMER
8202	06	8202	00	IBM i	5770AMT	5050	RTL APP MGMT TOOLSET FOR I	Processor group P10	V7	Germany	724	
8202	06	8202	00	IBM i	5770BR1	5050	BRMS	Processor group P10	V7	Germany	724	
8202	06	8202	00	IBM i	5770BR1	5101	BRMS Network Function	1 Processor(s)	V7	Germany	724	
8202	06	8202	00	IBM i	5770BR1	5102	BRMS Advanced Fuction	Processor group P10	V7	Germany	724	
8202	06	8202	00	IBM i	5770PT1	5050	PERFORMANCE TOOLS	Processor group P10	V7	Germany	724	
8202	06	8202	00	IBM i	5770PT1	5101	Performance Tools - Manager	Processor group P10	V7	Germany	724	
8202	06	8202	00	IBM i	5770QU1	5050	QUERY	Processor group P10	V7	Germany	724	
8202	06	8202	00	IBM i	5770SS1	5050	IBM i	1 Number of Machine(s)	V7	Germany	724	
8202	06	8202	00	IBM i	5770SS1	5051	IBM i - Per Processor	4 Processor(s)	V7	Germany	724	
8202	06	8202	00	IBM i	5770SS1	5052	IBM i Users	30 Users	V7	Germany	724	
8202	06	8202	00	IBM i	5770SS1	5103	Media & Storage Extensions	1 Processor(s)	V7	Germany	724	
8202	06	8202	00	IBM i	5770SS1	5112	PSF for IBM i 1-55 IPM Print	1 Server(s)	V7	Germany	724	
8202	06	8202	00	IBM i	5770SS1	5117	HA Journal Performance	Processor group P10	V7	Germany	724	
8202	06	8202	00	IBM i	5770ST1	5050	DB2 QUERY MGR AND SQL DevKt	Processor group P10	V7	Germany	724	
8202	06	8202	00	IBM i	5770WDS	5050	RATIONAL DEVELOPMENT STUDIO	1 License(s)	V7	Germany	724	
8202	06	8202	00	IBM i	5770WDS	5101	ILE Compilers	Processor group P10	V7	Germany	724	
8202	06	8202	00	IBM i	5770WDS	5101	ILE Compilers	3 Users	V7	Germany	724	
8202	06	8202	00	IBM i	5770WDS	5102	Heritage Compilers	Processor group P10	V7	Germany	724	
8202	06	8202	00	IBM i	5770WDS	5102	Heritage Compilers	3 Users	V7	Germany	724	
8202	06	8202	00	IBM i	5770WDS	5103	Appl Development ToolSet	Processor group P10	V7	Germany	724	
8202	06	8202	00	IBM i	5770WDS	5103	Appl Development ToolSet	3 Users	V7	Germany	724	
8202	06	8202	00	IBM i	5770XW1	5101	IBM i Access Family	Processor group P10	V7	Germany	724	

Whether you use Inventory Services or ESS to verify donor records, if your 57xx-SS1 entitlements are incorrect or missing, you need to work with the Key Center, your asset management organization or the Power Systems Software Compliance and Entitlement Support team (rchalpr@us.ibm.com) to get them updated before proceeding with your configuration.

If you are going to be using the Initial Order path to transfer IBM i entitlements to a new PureFlex or Flex Power compute node, you still need to verify the accuracy of LMS entitlement records before you start your configuration. Even though you won't be retrieving donor machine entitlements for a base system, the 5733-NKY order will be processed based on the donor machine entitlement records in LMS. You will have problems if there is a mismatch between LMS records and your configuration, and it could impact your migration schedule or customer satisfaction.

Base systems for the Software Only and NEWSYS paths

The first step in configuring IBM i license transfer using the Software Only or NEWSYS e-config paths is to retrieve **current** inventory records for the donor machine. **Do not use previous configuration files for your base system as they may contain outdated entitlement information**. If you are configuring for a customer in a country that does not use Inventory Services to retrieve IBM i family software entitlement records directly from LMS, and there is a discrepancy between LMS records and your country inventory, you need to resolve the problem before proceeding with your configuration. Remember that the 5733-NKY order is processed based on LMS records, not country inventory records, so your base system in e-config **must** match the entitlements that LMS shows. Work with the Key Center, your asset management organization or the Power Systems Software Compliance and Entitlement Support team (rchalpr@us.ibm.com) to resolve any problems. **An edited or contrived base system that contains dummy serial numbers such as "SNx" or other non-existent software serial numbers for 57xx-xxx products is invalid for IBM i license transfer. Power Systems Software Compliance will direct the Key Center to delete any entitlements created by orders based on invalid base entitlements.**

Another reason to always start fresh with current inventory records is to help ensure that the donor machine has active SWMA, which is a requirement for IBM i license transfer. E-config can detect

whether SWMA is present in a base system but it has no knowledge of SWMA effective dates, so **it is the seller's responsibility to make sure the donor machine SWMA entitlement used in the base system is still active and has not expired at the time the IBM i license transfer orders are actually placed**. If you are configuring for a customer in a country where SWMA renewals are ordered via e-config because ServiceElite contracts are not available, and you need to order a SWMA renewal for your donor machine, order the SWMA renewal first so the SWMA entitlement can be retrieved for your IBM i license transfer configuration to avoid any compliance issues.

It is strongly advised that you review and if needed edit your base system to ensure it contains only current and pertinent software records, especially if you are transferring other software along with IBM i. Your base system should not have multiple versions of the *same* product, for example not both 5761-xyz and 5770-xyz; you only want the latest version. There is no need to include RPQ software, nor billing vehicles such as 57xx-SSA, 57xx-SSC[1], or 5722-IVP/DVP/SVP, nor records of previous 5733-NKY transfers to the donor machine. There is no need to include records for products such as MQSeries, Lotus Domino, Content Manager or other products which are now available exclusively via Passport Advantage. A "clean" base system helps avoid errors or unexpected results in your configuration output.

[1] Exception:
If your donor system is entitled for IBM i V5R4 and has either Unlimited users or Collaboration users, make sure to also include 5722-SSC in your base system inventory records. Normally for IBM i we don't need to retrieve billing PIDs, but in this case Unlimited users and Collaboration users once had the same registration feature code for entitlement on the 5722-SS1 order, so e-config needs to look at the 5722-SSC billing PID to determine whether the customer has Unlimited users or Collaboration users.

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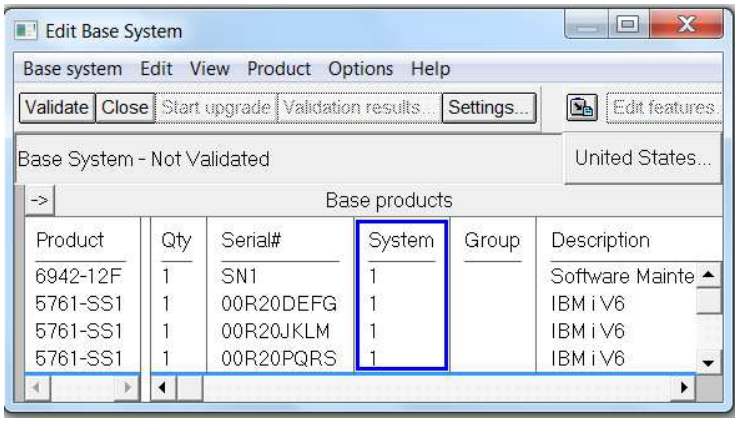
Software Only path

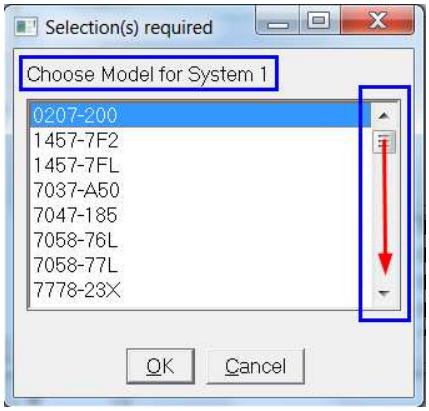
When using the Software Only path in e-config, your base system cannot contain any hardware inventory records. To configure IBM i license transfer you only need to retrieve the donor machine's 57xx-SS1 IBM i entitlements[1] (there may be multiple 57xx-SS1 records) and IBM i SWMA (5733-SM5, 5733-SU3/SXS, 5733-SPP/SPE/SP3 or 6942-73G/12F), but if you have other licensed program products you want to transfer you can include them in your base system also. Remember that PowerVM is not transferrable. You cannot add any **new** processor or user entitlements in the Software Only path.

[1] Exception:
If your donor system is entitled for IBM i V5R4 and has either Unlimited users or Collaboration users, make sure to also include 5722-SSC in your base system inventory records. Normally for IBM i we don't need to retrieve billing PIDs, but in this case Unlimited users and Collaboration users once had the same registration feature code for entitlement on the 5722-SS1 order, so e-config needs to look at the 5722-SSC billing PID to determine whether the customer has Unlimited users or Collaboration users.

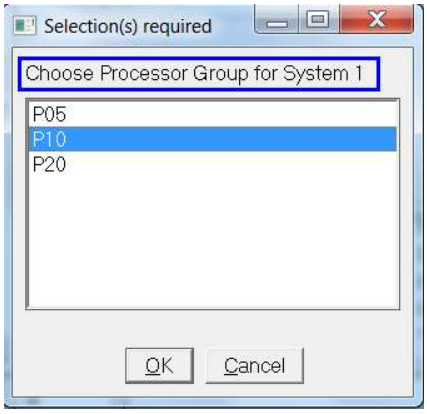
Before you import your base system into e-config, edit the base and make sure that the System ID is the same on all of the products. If it isn't, you will experience configuration problems. Consult your asset management organization for advice on updating the inventory records so that all of the software and SWMA records have the same system type/number. Once the inventory records have been updated you can retrieve the inventory again and proceed with your configuration.



When validating the base system, scroll down the list of options and select the type/model of the donor machine.



If your donor machine is a model whose processor features fall into more than one processor group for software charges, you will get a second prompt during base validation to choose the processor group of the donor machine. For example, 9406-520 can be either a P05, P10 or P20 processor group for software charges (see sample screen below). Make sure to select the processor group that matches the model and processor features of your donor machine.



Configuration steps to include IBM i license transfer in a Software Only configuration

The following examples show how to include IBM i license transfer in a Software Only configuration. The examples assume you have already retrieved and validated the donor software inventory records. All sample output shows U.S.A. feature codes and prices. The examples are:

- **Example 1. Transfer two IBM i processor entitlements and Unlimited users from a 9408-M25 at 6.1 to an 8202-E4D at 7.1**
- **Example 2. Transfer three IBM i processor entitlements from an 8204-E8A at 6.1 to a 9119-MME at 7.2 and upgrade SWMA to three years with 24x7 support**
- **Example 3. Transfer four IBM i processor entitlements and thirty users from an 8202-E4C at 7.1 to a 7895-23X at 7.1 and upgrade SWMA to 24x7 support**
- **Example 4. Transfer eight IBM i processor entitlements from a 9117-MMA at 6.1 to a 7895-43X at 7.2, receive entitlement for Unlimited users**

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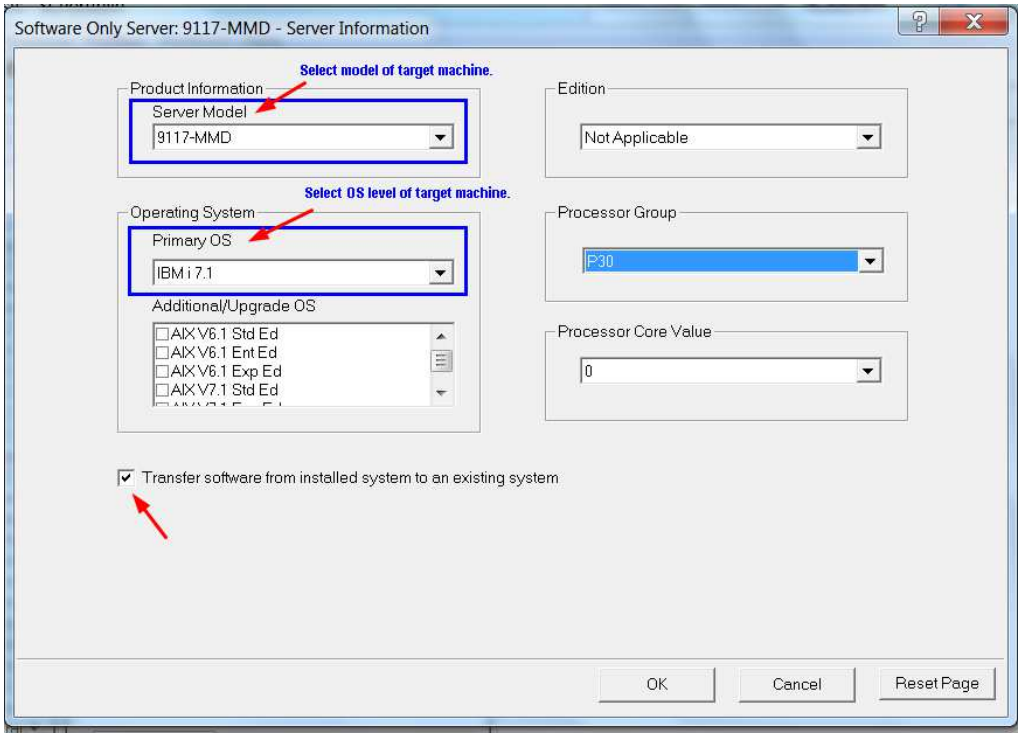
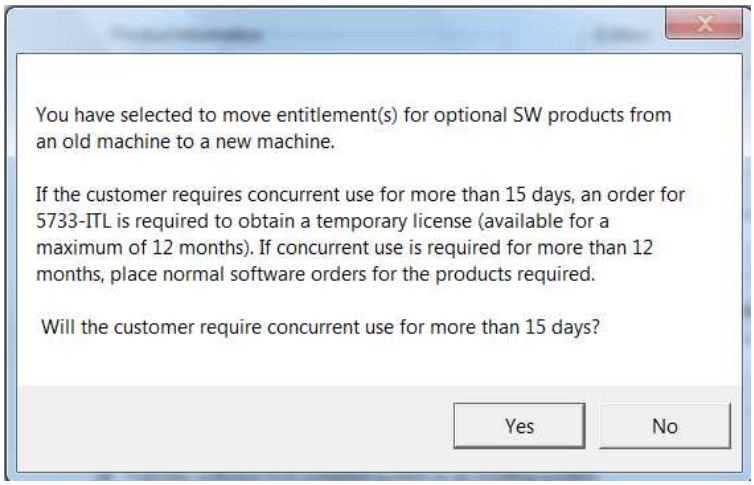
The starting point for the examples is the Software Only Server wizard where you specify the type/model of the target machine. If the target machine has entitlement for a later version/release of IBM i than the donor, you can change the primary OS level to the level of the target machine and e-config will upgrade the entitlements to the target's level. In most cases the Processor Group will be set for you based on the server model you choose, however on models such as the Power S814 or 720 whose software licensing can be in different processor groups based on the number of processor cores, you will need to ensure that the correct processor group is selected. The "Transfer software from installed system to an existing system" box must be checked.

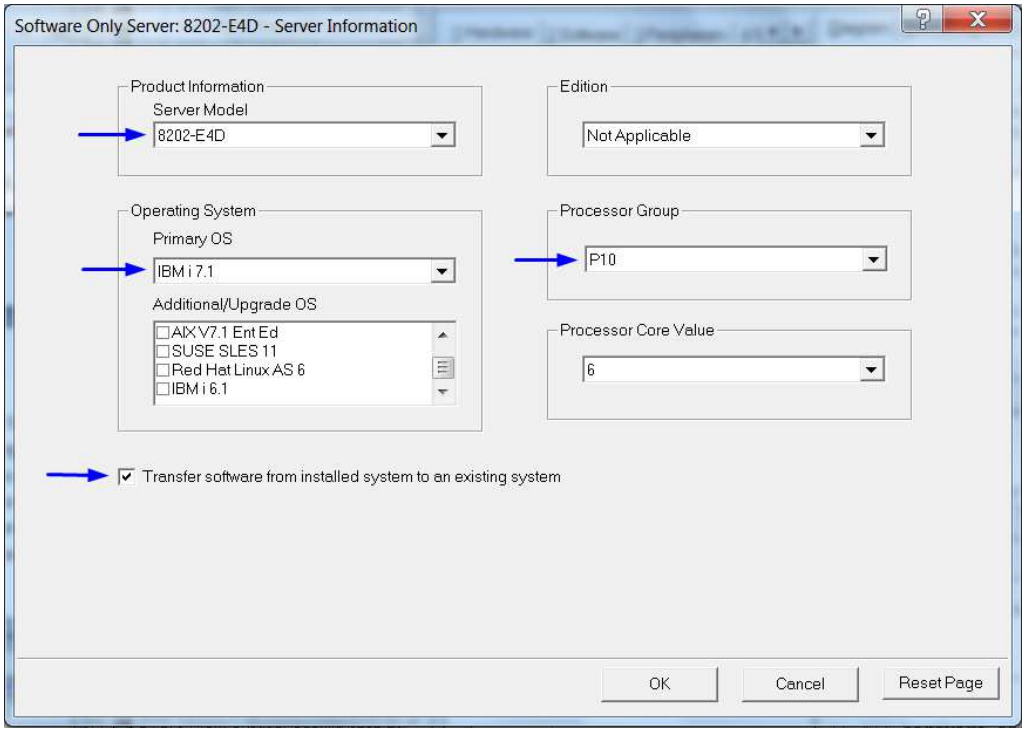


After clicking OK you'll need to respond to a popup message asking whether the customer will need more than fifteen days to migrate from the donor to the target. If you answer "yes," you will also need to configure 5733-ITL for temporary IBM i licensing. See the topic "Temporary Licensing" for more information.



Software Only example 1

1. In this example we are transferring two IBM i processor entitlements and Unlimited users from a 9408-M25 at 6.1 to an 8202-E4D at 7.1. In the Software Only Server wizard, start by changing the Sever Model to 8202-E4D and the Primary OS to 7.1. Verify the Processor Group is set to P10 and check the “Transfer software from installed system to an existing system” box. Click OK and respond "No" to the popup message asking whether the customer will need more than 15 days to migrate from the donor to the target.



2. Next edit the Product Features tab of 5770-SS1. The implementation of this screen in the Software Only path can be a little confusing at first -- unlike the way it works in the NEWSYS and Initial Order paths, here you cannot add any *new* entitlements, so the Min, Max and Qty fields for per Processor are fixed at the quantity of the donor entitlements. Set the per Processor License Transfer Qty to two because we are transferring two IBM i processor entitlements from the donor machine. Similarly, the quantity of one in the Unlimited Users Qty field reflects the donor machine entitlement eligible for transfer. Set the Unlimited Users License Transfer Qty to one to confirm you want to transfer the Unlimited Users entitlement. Even though it looks like you will be ordering two new processor entitlements and a new Unlimited Users entitlement, the new per Processor and Unlimited Users quantities will not be reflected in the configuration output; think of them as information-only fields.

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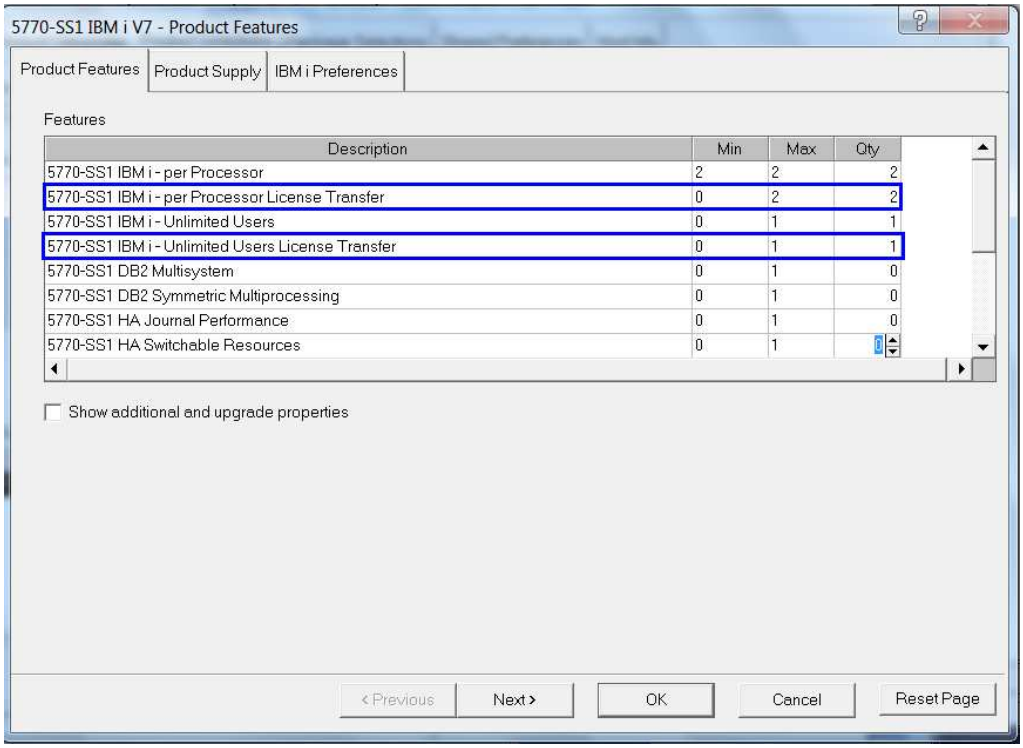
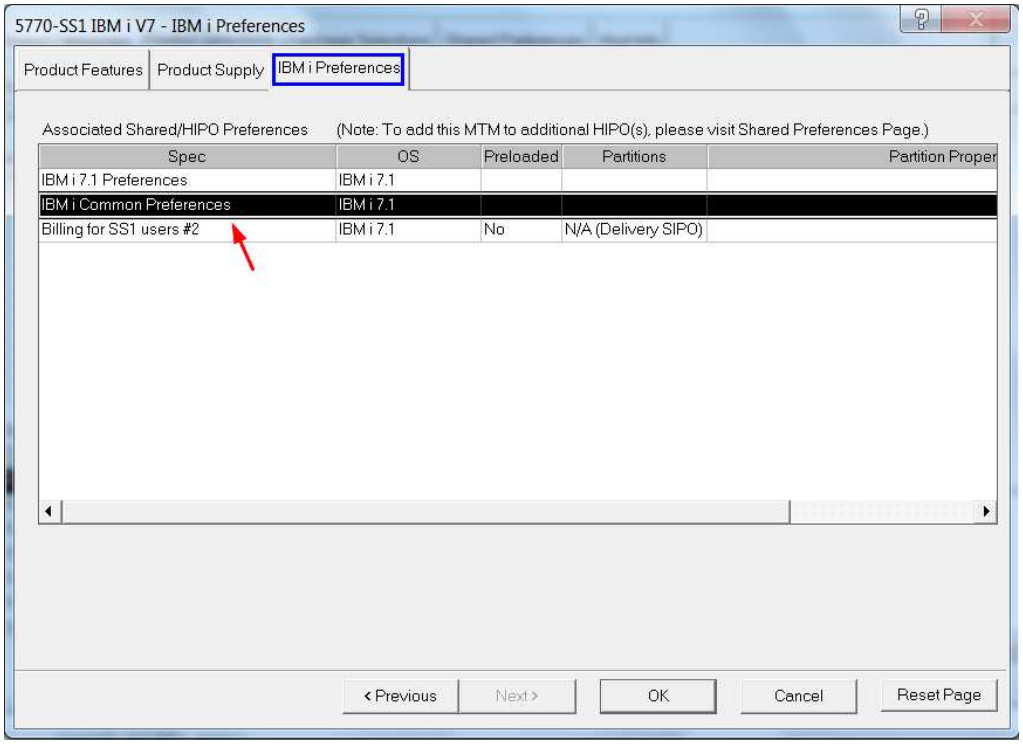
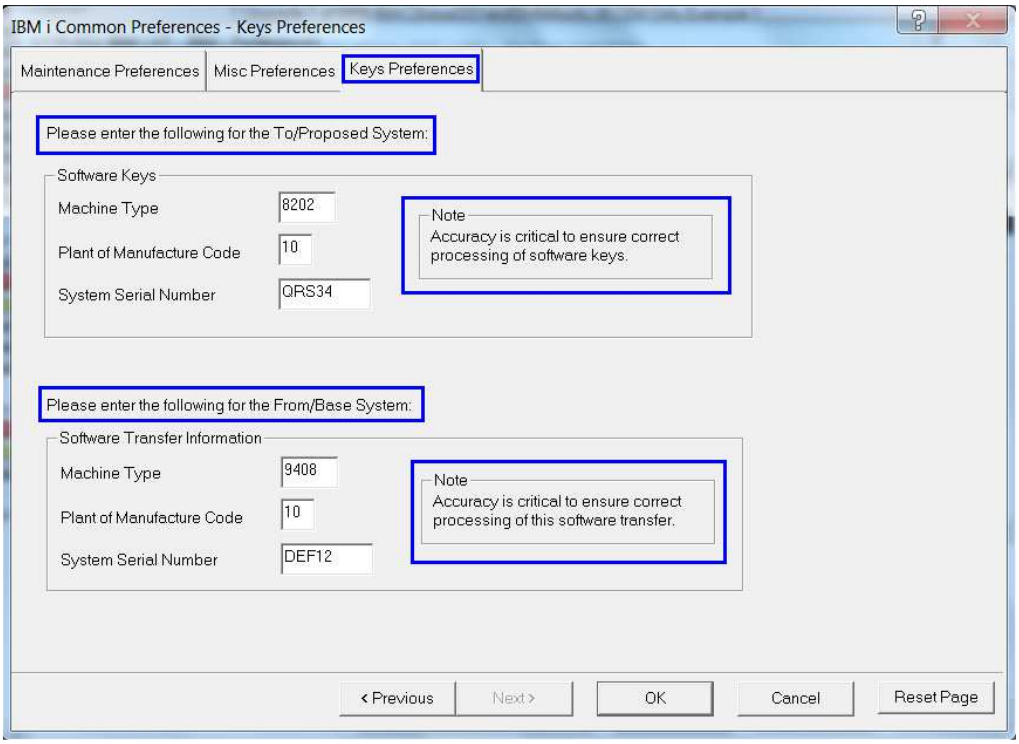


3. Select the IBM i Preferences tab at the top of the screen and double click on IBM i Common Preferences.



4. Next select the Keys Preferences tab and enter the Machine Type, Plant of Manufacture Code and System Serial Number for the donor and target systems. Do not guess at the Plant of Manufacture Code (verify on the machines if needed).



5. In this example we are leaving IBM i Software Maintenance at one year with 9x5 coverage, but if desired we could have selected the Maintenance Preferences tab and made changes. Click "OK" on the Keys Preferences tab and then again on the IBM i Preferences tab, then click "Configure." Validate the configuration. The configuration output showing new software orders is shown below. Notice that the IBM i order is for 5770-SS1, because e-config upgraded the 6.1 entitlements from the donor system. The 40xx features on the 5733-NKY order represent the donor, and the 40xx features on the 5770-SS1 order represent the target.

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5733-NKY	Deactivate Software Key and ePoE	1	N/C
2539	IBM i - per Processor (57xx-SS1)	2	N/C
2619	Media and Storage Extensions (57xx-SS1)	1	N/C
2681	PSF/400 1-55 PPM (57xx-SS1)	1	N/C
2924	English U/L SBCS Primary	1	N/C
4001	SW Key 1st MT Digit V5	9	N/C
4002	SW Key 2nd MT Digit V5	4	N/C
4003	SW Key 3rd MT Digit V5	10	N/C
4004	SW Key 4th MT Digit V5	8	N/C
4005	SW Key 1st CPU Digit V5	1	N/C
4006	SW Key 2nd CPU Digit V5	10	N/C
4007	SW Key 3rd CPU Digit V5	14	N/C
4008	SW Key 4th CPU Digit V5	15	N/C
4009	SW Key 5th CPU Digit V5	16	N/C
4010	SW Key 6th CPU Digit V5	1	N/C
4011	SW Key 7th CPU Digit V5	2	N/C
5809	5733-ITL Info Letter	1	N/C
6482	IBM i - Unlimited User (57xx-SS1)	1	N/C
	Serial: 000000000	Total	USD 0.00
5733-SPP	IBM Software Maintenance for IBM i and Selected Products, 1-Year Registration	1	N/C
4910	P10 0Price Per Proc 1Yr Reg	2	N/C
	Serial: 000000000	Total	USD 0.00
5770-SS1	IBM i V7	1	N/C
0492	BOTC Upg PSF 1-55 PPM (from 5761-SS1)	1	N/C
1063	BOTC Upg MSE (from 5761-SS1)	1	N/C
1448	OTC per IBM i license transfer	2	10,000.00
3441	LPAR System Indicator	1	N/C
3450	Electronic SW Delivery (ESD)	1	N/C
4001	SW Key 1st MT Digit	8	N/C
4002	SW Key 2nd MT Digit	2	N/C
4003	SW Key 3rd MT Digit	10	N/C
4004	SW Key 4th MT Digit	2	N/C
4005	SW Key 1st CPU Digit	1	N/C
4006	SW Key 2nd CPU Digit	10	N/C
4007	SW Key 3rd CPU Digit	27	N/C
4008	SW Key 4th CPU Digit	28	N/C
4009	SW Key 5th CPU Digit	29	N/C
4010	SW Key 6th CPU Digit	3	N/C
4011	SW Key 7th CPU Digit	4	N/C
5817	Supply IBM i Lang Group 1 (i7.1)	1	N/C
5870	V7R1M0 Machine Code - RS 710-J(TR7)(15 Nov 2013)	1	N/C
5900	IBM i License Transfer Document	1	N/C
5911	Supply Media & Storage Extensions (i7.1)	1	N/C
5916	Supply PSF/400 1-55 PPM (i7.1)	1	N/C
6001	ePoE Registration	1	N/C
6348	IBM i per Proc Transfer Registration	2	N/C
6352	IBM i Unlimited User Transfer Registration	1	N/C
	Serial: 000000000	Total	USD 10,000.00

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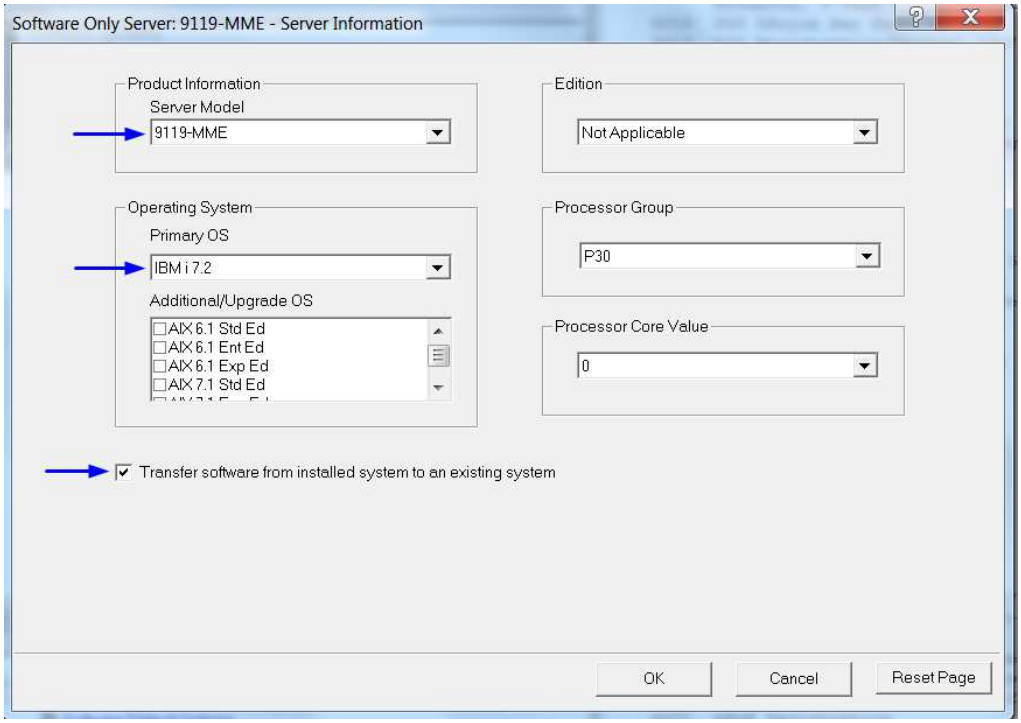
Software Only example 2

1. In this example we are transferring three IBM i processor entitlements from an 8204-E8A at 6.1 to a 9119-MME at 7.2 and upgrading SWMA to three years with 24x7 support. In the Software Only Server wizard, start by changing the Sever Model to 9119-MME and the Primary OS to 7.2. Check the “Transfer software from installed system to an existing system” box. Click OK and respond "No" to the popup message asking whether the customer will need more than fifteen days to migrate from the donor to the target.



2. Next edit the Product Features tab of 5770-SS1. Set the per Processor License Transfer Qty to three. The implementation of this screen in the Software Only path can be a little confusing at first -- unlike the way it works in the NEWSYS and Initial Order paths, here you cannot add any *new* processor entitlements, so the Min, Max and Qty fields for per Processor are fixed at the quantity of the donor entitlements. Even though it looks like you will be ordering three new processor licenses, the new per Processor Qty will not be reflected in the configuration output; think of it as an information-only field.

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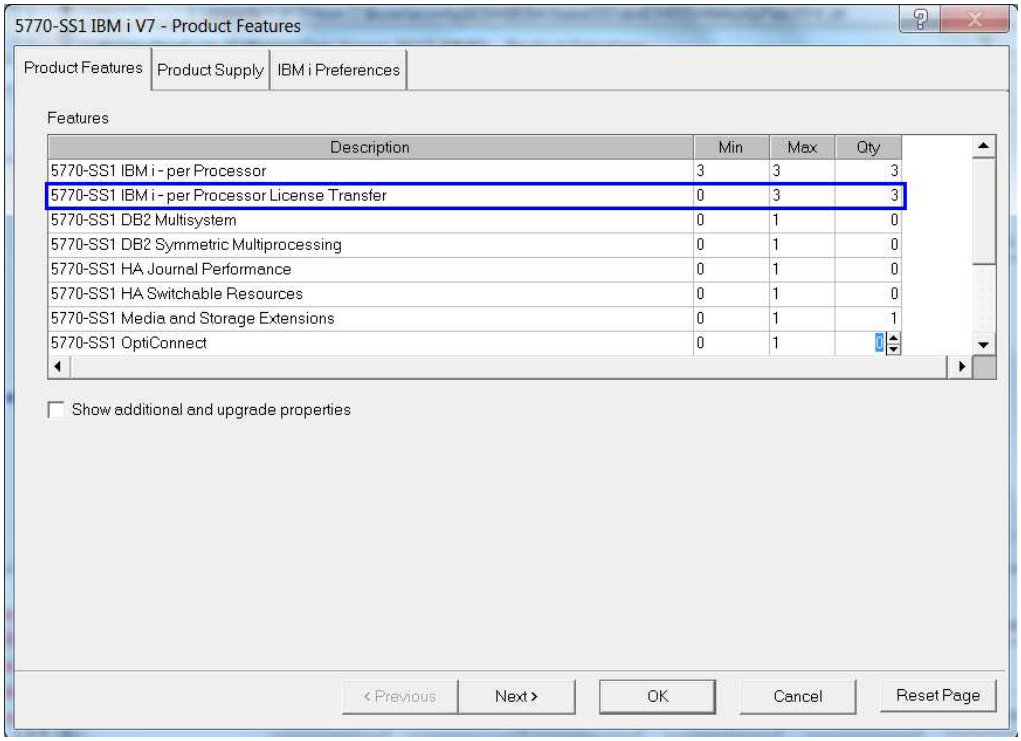
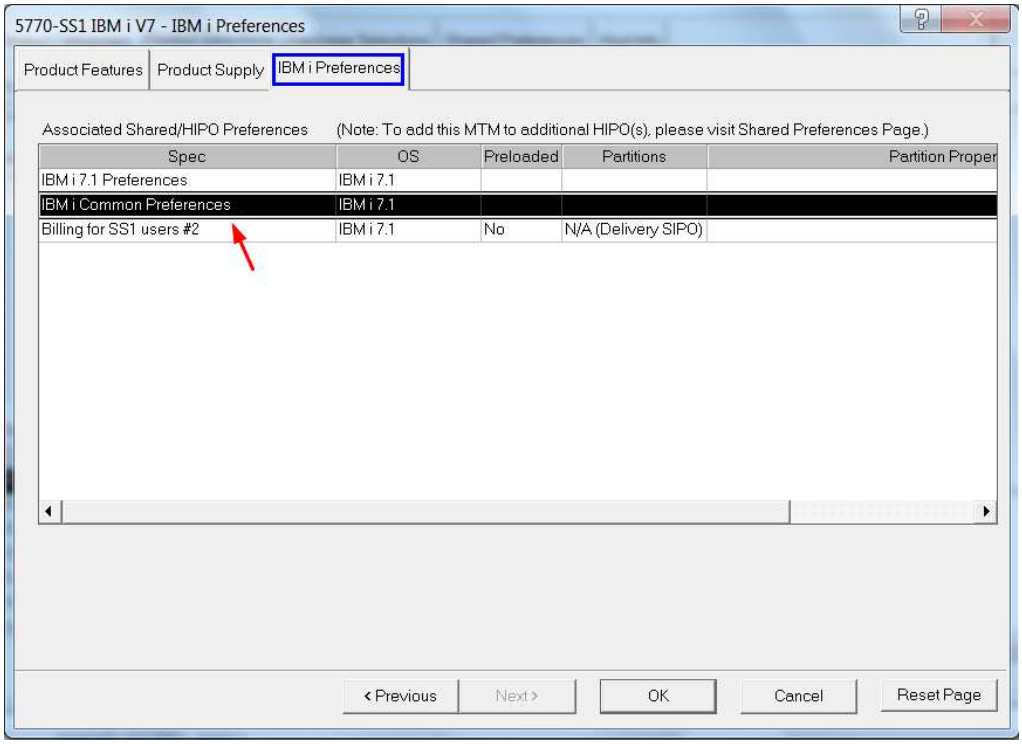
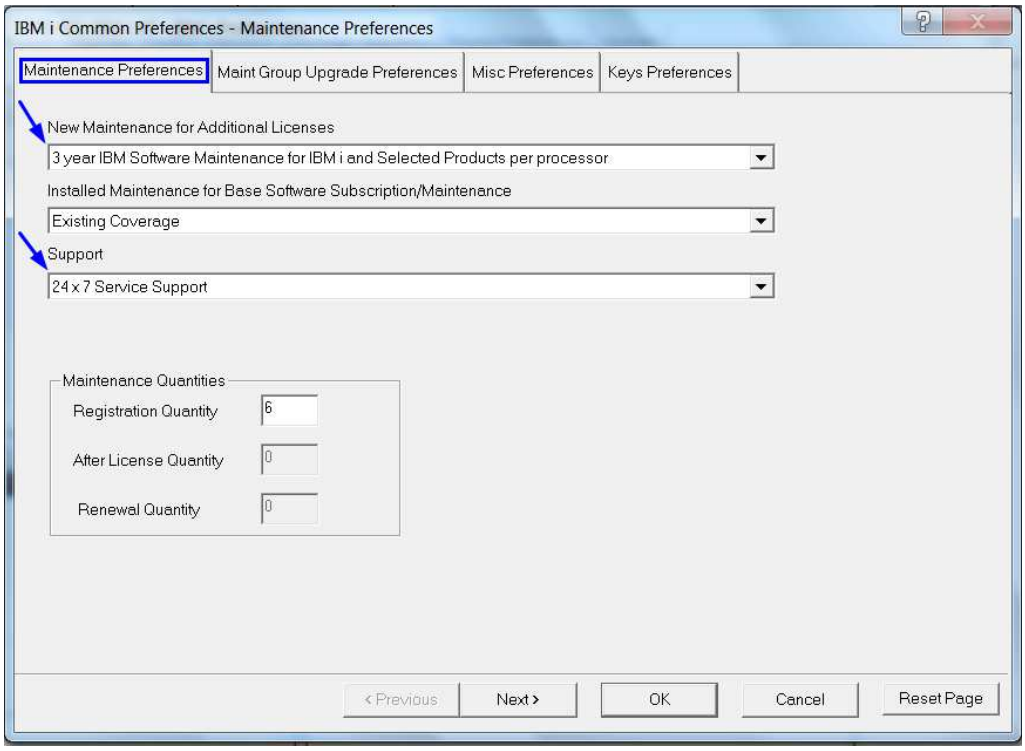


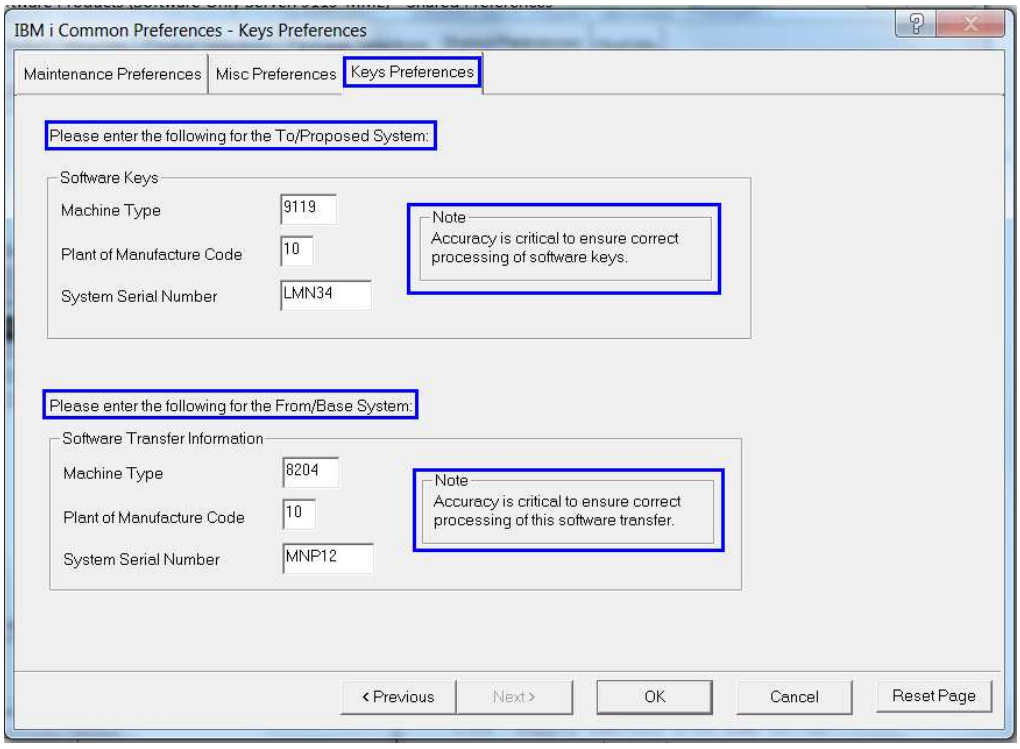
3. Next select the IBM i Preferences tab at the top of the screen and double click on IBM i Common Preferences.



4. Select the Maintenance Preferences tab and choose three year SWMA with 24x7 support.



5. Next select the Keys Preferences tab and enter the Machine Type, Plant of Manufacture Code and System Serial Number for the donor and target systems. Do not guess at the Plant of Manufacture Code (verify on the machines if needed).

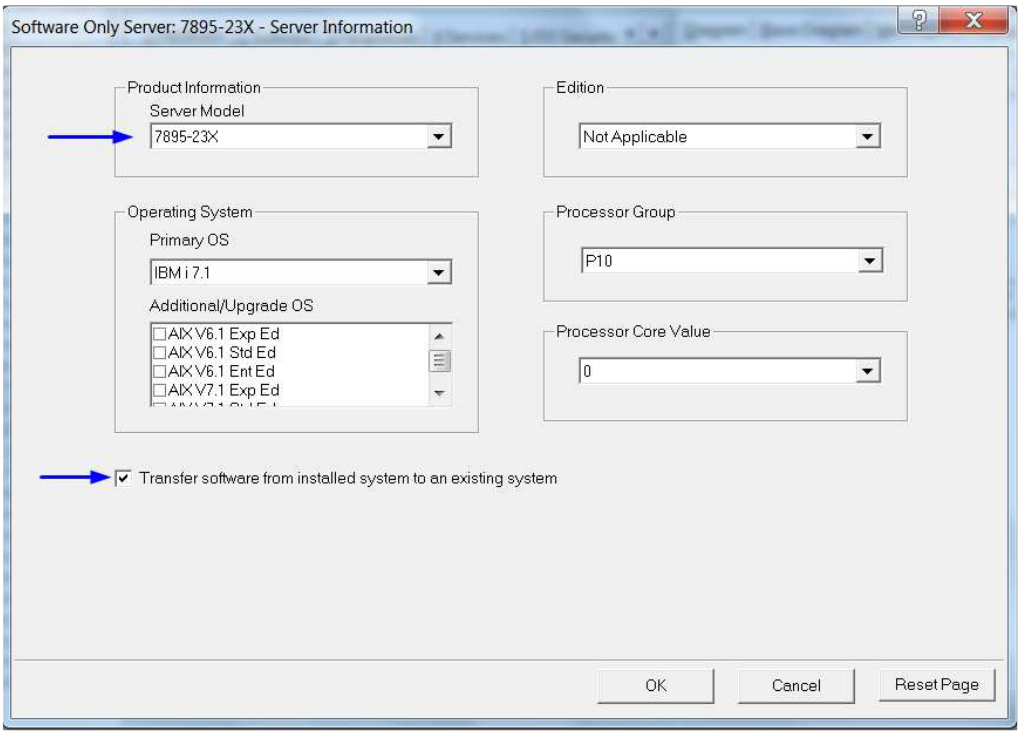


6. Click "OK" on the Keys Preferences tab and then again on the IBM i Preferences tab, then click "Configure." Validate the configuration. The configuration output showing new software orders is shown below. Notice that the IBM i order is for 5770-SS1, because e-config upgraded the 6.1 entitlements from the donor system. The 40xx features on the 5733-NKY order represent the donor, and the 40xx features on the 5770-SS1 order represent the target.

5733-NKY	Deactivate Software Key and ePoE	1	N/C
2539	IBM i - per Processor (57xx-SS1)	3	N/C
2619	Media and Storage Extensions (57xx-SS1)	1	N/C
2681	PSF/400 1-55 PPM (57xx-SS1)	1	N/C
2924	English U/L SBCS Primary	1	N/C
4001	SW Key 1st MT Digit V5	8	N/C
4002	SW Key 2nd MT Digit V5	2	N/C
4003	SW Key 3rd MT Digit V5	10	N/C
4004	SW Key 4th MT Digit V5	4	N/C
4005	SW Key 1st CPU Digit V5	1	N/C
4006	SW Key 2nd CPU Digit V5	10	N/C
4007	SW Key 3rd CPU Digit V5	23	N/C
4008	SW Key 4th CPU Digit V5	24	N/C
4009	SW Key 5th CPU Digit V5	26	N/C
4010	SW Key 6th CPU Digit V5	1	N/C
4011	SW Key 7th CPU Digit V5	2	N/C
5809	5733-ITL Info Letter	1	N/C
	Serial: 000000000	Total	USD 0.00
5733-SP3	IBM Software Maintenance for IBM i and Selected Products, 3-Year Registration	1	N/C
0010	P30 0Price Per Proc 3Yr Reg	3	N/C
0012	P30 Registration/Renewal 24x7	3	5,559.00
	Serial: 000000000	Total	USD 5,559.00
5733-SPE	IBM Software Maintenance for IBM i and Selected Products, 3-Year Extended Registration	1	N/C
4945	P30 Per Processor 3Yr Reg	3	35,700.00
	Serial: 000000000	Total	USD 35,700.00
5770-SS1	IBM i V7	1	N/C
0492	BOTC Upg PSF 1-55 PPM (from 5761-SS1)	1	N/C
1063	BOTC Upg MSE (from 5761-SS1)	1	N/C
1449	OTC per IBM i license transfer (Small to Medium)	3	54,000.00
3441	LPAR System Indicator	1	N/C
3450	Electronic SW Delivery (ESD)	1	N/C
4001	SW Key 1st MT Digit	9	N/C
4002	SW Key 2nd MT Digit	1	N/C
4003	SW Key 3rd MT Digit	1	N/C
4004	SW Key 4th MT Digit	9	N/C
4005	SW Key 1st CPU Digit	1	N/C
4006	SW Key 2nd CPU Digit	10	N/C
4007	SW Key 3rd CPU Digit	22	N/C
4008	SW Key 4th CPU Digit	23	N/C
4009	SW Key 5th CPU Digit	24	N/C
4010	SW Key 6th CPU Digit	3	N/C
4011	SW Key 7th CPU Digit	4	N/C
5827	Supply IBM i Lang Group 1 (i7.2)	1	N/C
5872	V7R2M0 Machine Code - RS 720-E(TR2)(29 May 2015)	1	N/C
5900	IBM i License Transfer Document	1	N/C
5921	Supply Media & Storage Extensions (i7.2)	1	N/C
5926	Supply PSF/400 1-55 PPM (i7.2)	1	N/C
6001	ePoE Registration	1	N/C
6348	IBM i per Proc Transfer Registration	3	N/C
	Serial: 000000000	Total	USD 54,000.00

Software Only example 3

1. In this example we are transferring four IBM i processor entitlements and thirty users from an 8202-E4C at 7.1 to a 7895-23X at 7.1 and upgrading SWMA to 24x7 support. In the Software Only Server wizard, start by changing the Sever Model to 7895-23X and check the “Transfer software from installed system to an existing system” box. Click OK and respond "No" to the popup message asking whether the customer will need more than fifteen days to migrate from the donor to the target.



2. Next edit the Product Features tab of 5770-SS1. We have six processor entitlements available for transfer but we only want to transfer four of them, so set the per Processor License Transfer Qty to four. Then set the per User License Transfer Qty to thirty. The implementation of this screen in the Software Only path can be a little confusing at first -- unlike the way it works in the NEWSYS and Initial Order paths, here you cannot add any *new* processor or user entitlements, so the Min, Max and Qty fields for per Processor and per User are fixed at the quantity of the donor entitlements. Even though it looks like you will be ordering six new processor licenses and thirty new users, the new per Processor and per User quantities will not be reflected in the configuration output; think of them as information-only fields.

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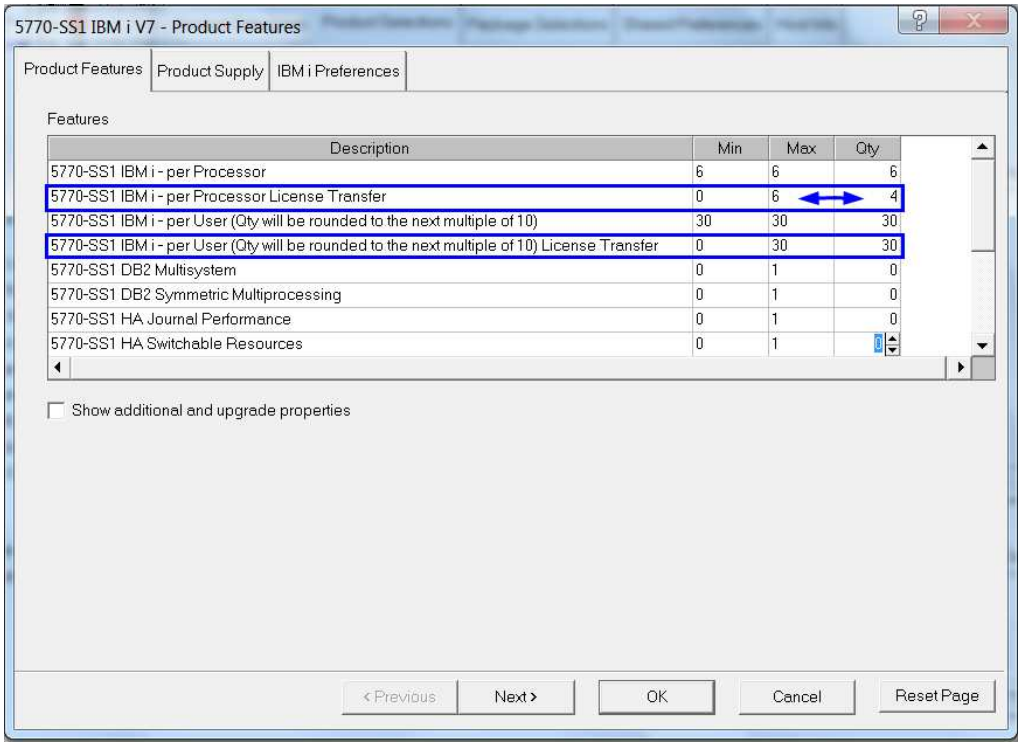
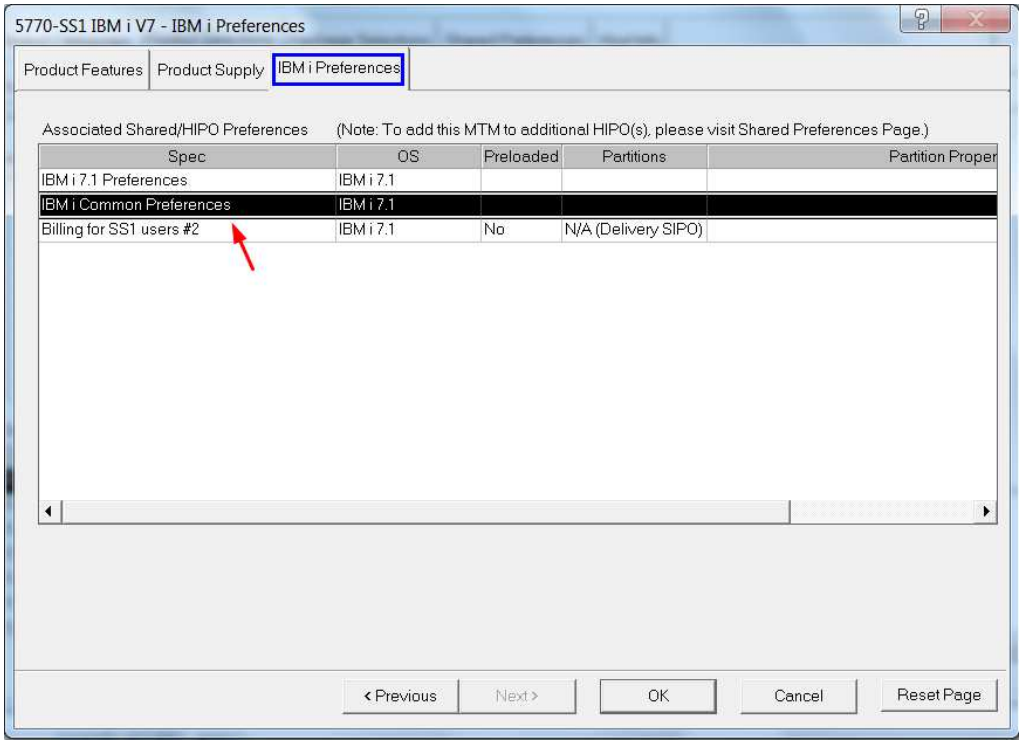
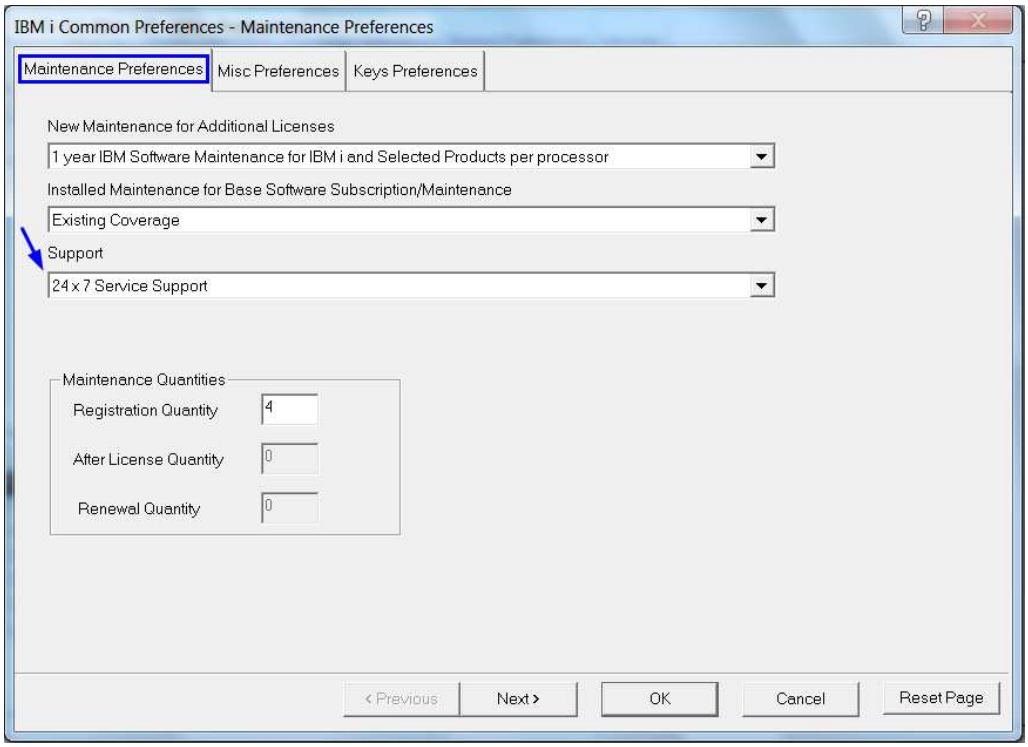


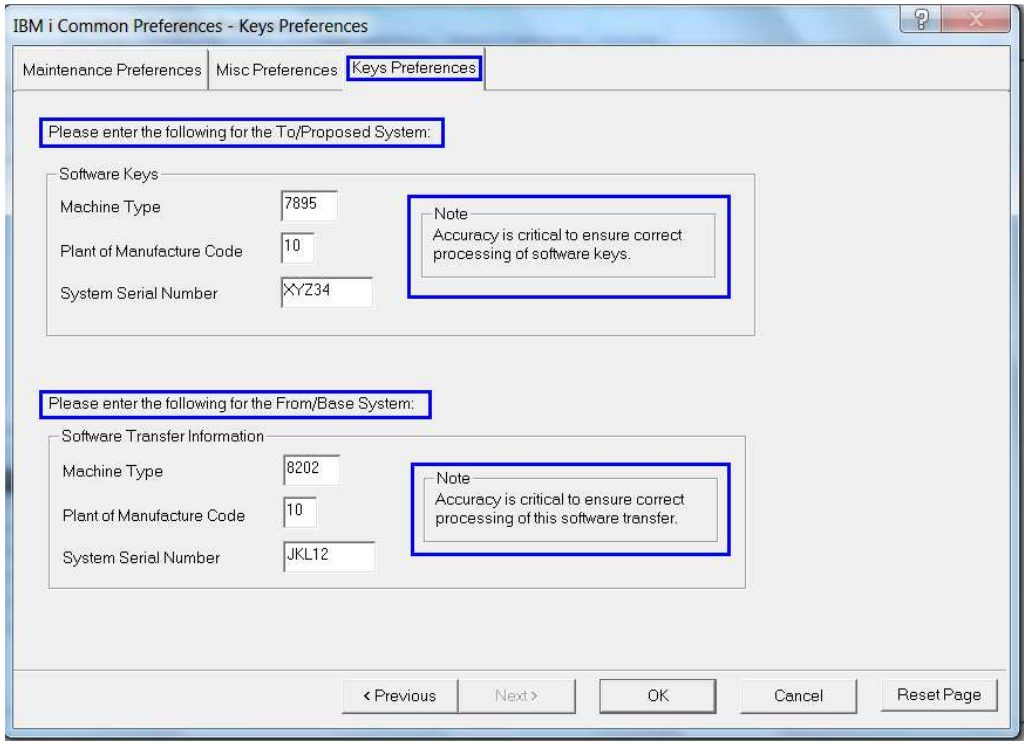
3. Next select the IBM i Preferences tab at the top of the screen and double click on IBM i Common Preferences.



4. Select the Maintenance Preferences tab and choose 24x7 support.



5. Next select the Keys Preferences tab and enter the Machine Type, Plant of Manufacture Code and System Serial Number for the donor and target systems. Do not guess at the Plant of Manufacture Code (verify on the machines if needed).



6. Click "OK" on the Keys Preferences tab and then again on the IBM i Preferences tab, then click "Configure." Validate the configuration. A portion of the configuration output showing new software orders pertinent to our example is shown below. The 40xx features on the 5733-NKY order represent the donor, and the 40xx features on the 5770-SS1 order represent the target.

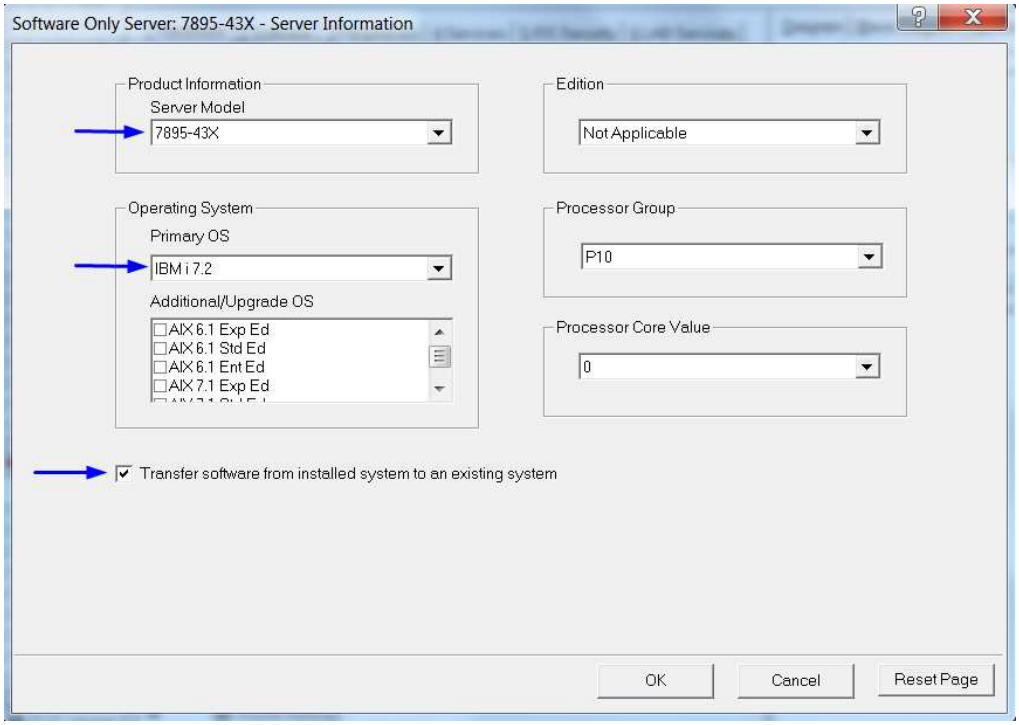
5733-NKY	Deactivate Software Key and ePoE	1	N/C
2511	DB2 Query (57xx-ST1)	1	N/C
2516	Client Access PB (57xx-XW1)	1	N/C
2521	Backup & Recovery Media Services (57xx-BR1)	1	N/C
2525	Performance Tools (57xx-PT1)	1	N/C
2539	IBM i - per Processor (57xx-SS1)	4	N/C
2586	Web Enablement for i5/OS (5722-WE2 V7.0)	1	N/C
2602	Encrypted Backup Enablement (57xx-SS1)	1	N/C
2610	Performance Tools Manager (57xx-PT1)	1	N/C
2617	Network Feature (57xx-BR1)	1	N/C
2619	Media and Storage Extensions (57xx-SS1)	1	N/C
2700	Web Query for i - Base Core (5733-WQX)	1	N/C
2704	Web Query for i - Auth User (5733-WQX)	1	N/C
2924	English U/L SBCS Primary	1	N/C
4001	SW Key 1st MT Digit V5	8	N/C
4002	SW Key 2nd MT Digit V5	2	N/C
4003	SW Key 3rd MT Digit V5	10	N/C
4004	SW Key 4th MT Digit V5	2	N/C
4005	SW Key 1st CPU Digit V5	1	N/C
4006	SW Key 2nd CPU Digit V5	10	N/C
4007	SW Key 3rd CPU Digit V5	20	N/C
4008	SW Key 4th CPU Digit V5	21	N/C
4009	SW Key 5th CPU Digit V5	22	N/C
4010	SW Key 6th CPU Digit V5	1	N/C
4011	SW Key 7th CPU Digit V5	2	N/C
5809	5733-ITL Info Letter	1	N/C
6481	IBM i - per User block of 5 (57xx-SS1)	6	N/C
	Serial: 000000000	Total	USD 0.00

5733-SPP	IBM Software Maintenance for IBM i and Selected Products, 1-Year Registration	1	N/C	
4910	P10 0Price Per Proc 1Yr Reg	4	N/C	
4912	P10 Registration/Renewal 24x7	4	1,372.00	
	Serial: 000000000	Total	USD 1,372.00	

5770-SS1	IBM i V7	1	N/C
1448	OTC per IBM i license transfer	4	20,000.00
3441	LPAR System Indicator	1	N/C
3450	Electronic SW Delivery (ESD)	1	N/C
4001	SW Key 1st MT Digit	7	N/C
4002	SW Key 2nd MT Digit	8	N/C
4003	SW Key 3rd MT Digit	9	N/C
4004	SW Key 4th MT Digit	5	N/C
4005	SW Key 1st CPU Digit	1	N/C
4006	SW Key 2nd CPU Digit	10	N/C
4007	SW Key 3rd CPU Digit	34	N/C
4008	SW Key 4th CPU Digit	35	N/C
4009	SW Key 5th CPU Digit	36	N/C
4010	SW Key 6th CPU Digit	3	N/C
4011	SW Key 7th CPU Digit	4	N/C
5817	Supply IBM i Lang Group 1 (i7.1)	1	N/C
5870	V7R1M0 Machine Code - RS 710-J(TR7)(15 Nov 2013)	1	N/C
5900	IBM i License Transfer Document	1	N/C
5911	Supply Media & Storage Extensions (i7.1)	1	N/C
5915	Supply Encrypted Backup Enablement (i7.1)	1	N/C
6001	ePoE Registration	1	N/C
6101	ePoE Registration - MSE	1	N/C
6348	IBM i per Proc Transfer Registration	4	N/C
6351	IBM i per User Transfer Registration (blk of 5)	6	N/C
6510	P10 ePoE Registration - Encrypted Backup	1	N/C
	Serial: 000000000	Total	USD 20,000.00

Software Only example 4

1. In this example we are transferring eight IBM i processor entitlements from a 9117-MMA at 6.1 to a 7895-43X at 7.2. In the Software Only Server wizard, start by changing the Sever Model to 7895-43X and the Primary OS to 7.2. Check the “Transfer software from installed system to an existing system” box. Click OK and respond "No" to the popup message asking whether the customer will need more than fifteen days to migrate from the donor to the target.



2. Next edit the Product Features tab of 5770-SS1. We have twenty processor entitlements available for transfer but we only want to transfer eight of them, so set the per Processor License Transfer Qty to eight. The implementation of this screen in the Software Only path can be a little confusing at first -- unlike the way it works in the NEWSYS and Initial Order paths, here you cannot add any *new* processor entitlements, so the Min, Max and Qty fields of per Processor are fixed at the quantity of the donor entitlements. Even though it looks like you will be ordering twenty new processor licenses, the new per Processor quantity will not be reflected in the configuration output; think of it as an information-only field.

Our example donor machine is in transfer group 2. When processor entitlements from donor machines in transfer groups 1, 2 or 3, which correspond to software tiers P20 and above, are transferred to PureFlex or Flex Power compute nodes **which have a software tier of P10**, the target PureFlex or Flex Power compute node will automatically receive an entitlement for Unlimited users. The Unlimited user entitlement is implemented as a "transfer" on the Product Features screen. As soon as you indicate that one or more processor entitlements are to be transferred, e-config will automatically change the Unlimited Users Transfer Qty to one.

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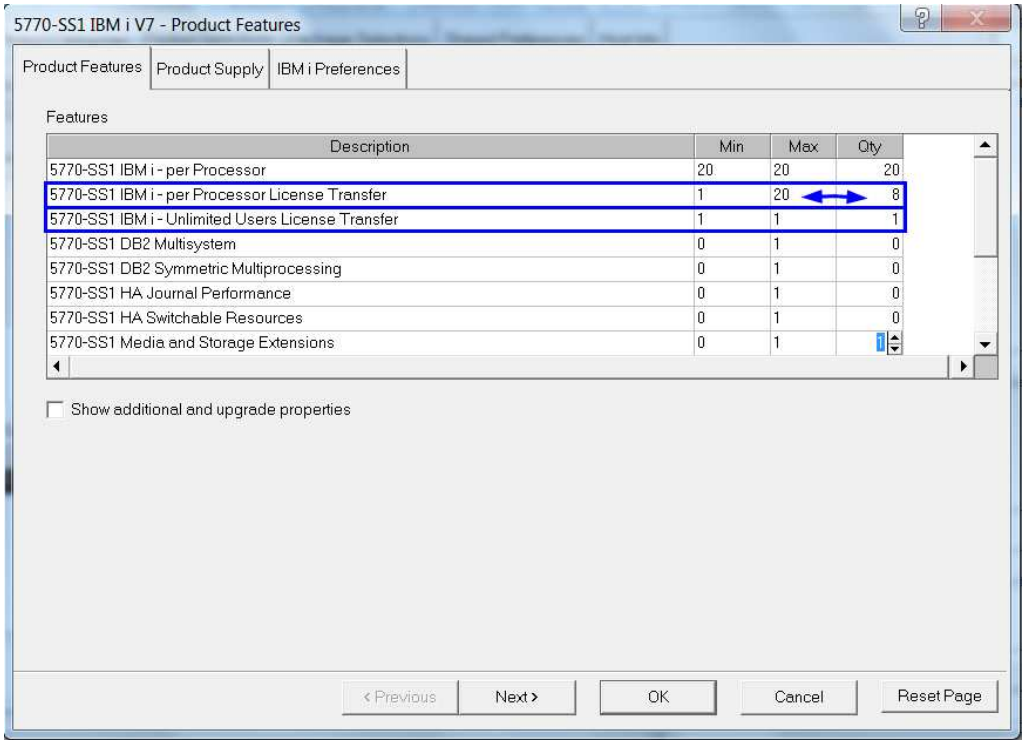
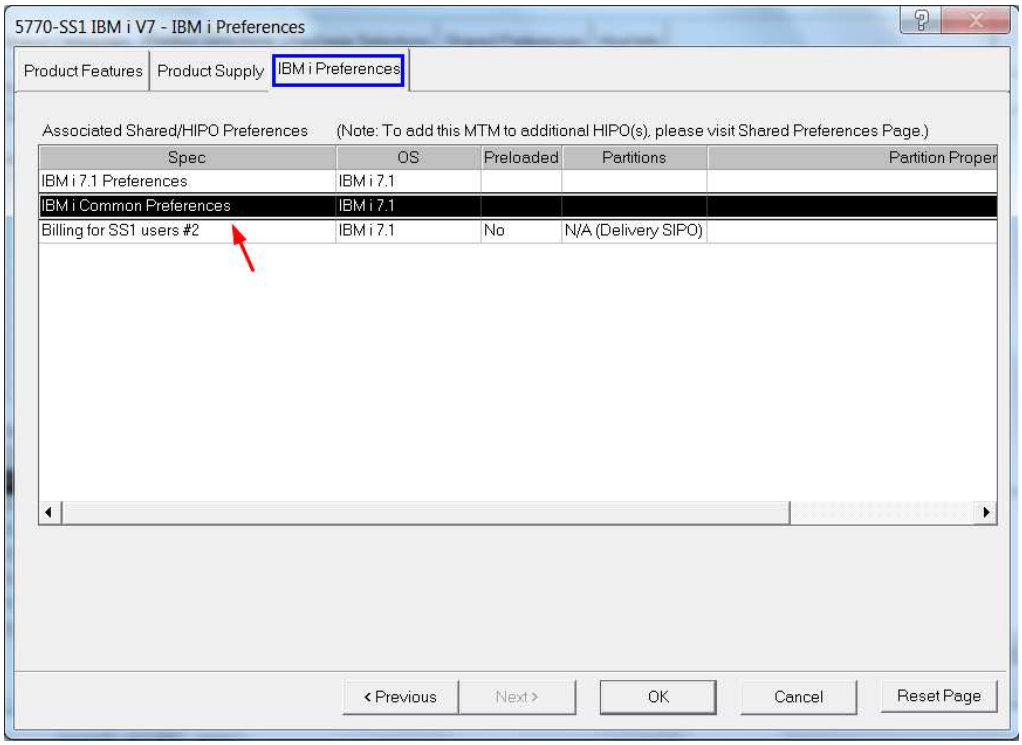
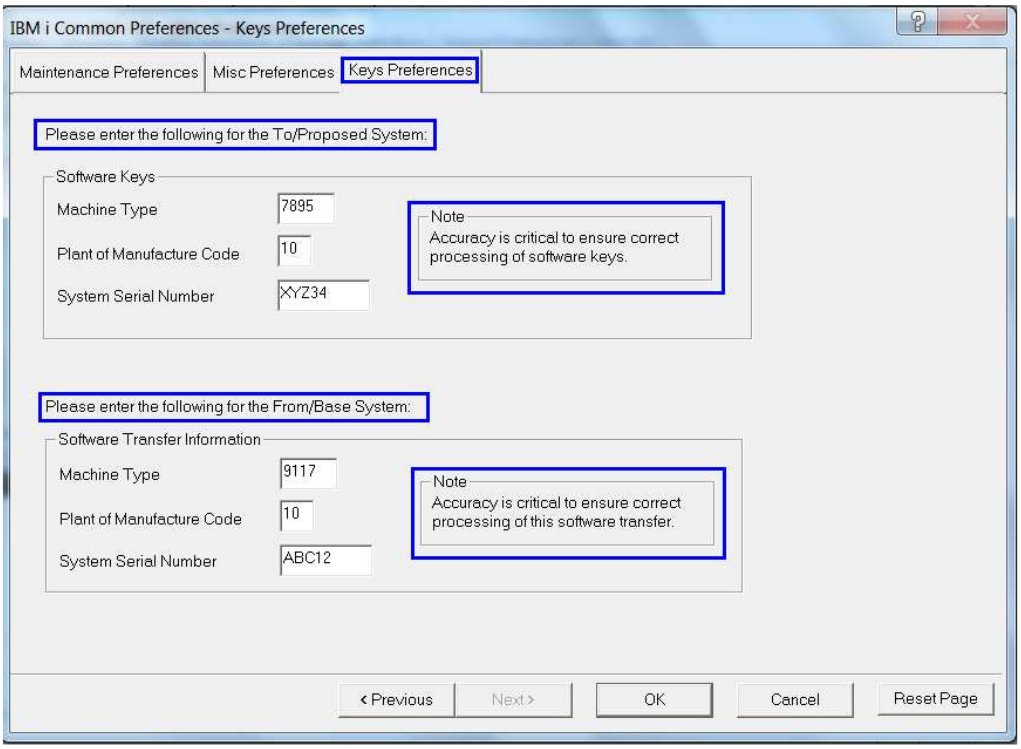


3. Select the IBM i Preferences tab at the top of the screen and double click on IBM i Common Preferences.



4. Next select the Keys Preferences tab and enter the Machine Type, Plant of Manufacture Code and System Serial Number for the donor and target systems. Do not guess at the Plant of Manufacture Code (verify on the machines if needed).



5. For this example we are leaving IBM i Software Maintenance at one year with 9x5 coverage, but if desired we could have selected the Maintenance Preferences tab and made changes. Click "OK" on the Keys Preferences tab and then again on the IBM i Preferences tab, then click "Configure." Validate the configuration. The configuration output showing new software orders is shown below. Notice that the IBM i order is for 5770-SS1, because e-config upgraded the 6.1 entitlements from the donor system. The 40xx features on the 5733-NKY order represent the donor, and the 40xx features on the 5770-SS1 order represent the target.

```
5733-NKY  Deactivate Software Key and ePoE                1          N/C
    2539  IBM i - per Processor (57xx-SS1)                8          N/C
    2619  Media and Storage Extensions (57xx-SS1)         1          N/C
    2924  English U/L SBCS Primary                        1          N/C
    4001  SW Key 1st MT Digit V5                          9          N/C
    4002  SW Key 2nd MT Digit V5                          1          N/C
    4003  SW Key 3rd MT Digit V5                          1          N/C
    4004  SW Key 4th MT Digit V5                          7          N/C
    4005  SW Key 1st CPU Digit V5                         1          N/C
    4006  SW Key 2nd CPU Digit V5                        10          N/C
    4007  SW Key 3rd CPU Digit V5                        11          N/C
    4008  SW Key 4th CPU Digit V5                        12          N/C
    4009  SW Key 5th CPU Digit V5                        13          N/C
    4010  SW Key 6th CPU Digit V5                         1          N/C
    4011  SW Key 7th CPU Digit V5                         2          N/C
    5809  5733-ITL Info Letter                            1          N/C

          Serial: 000000000                           Total       USD 0.00

5733-SPP  IBM Software Maintenance for IBM i and Selected 1          N/C
          Products, 1-Year Registration
    4910  P10 0Price Per Proc 1Yr Reg                    8          N/C

          Serial: 000000000                           Total       USD 0.00
```

5770-SS1	IBM i V7	1	N/C
1063	BOTC Upg MSE (from 5761-SS1)	1	N/C
1448	OTC per IBM i license transfer	8	40,000.00
3441	LPAR System Indicator	1	N/C
3450	Electronic SW Delivery (ESD)	1	N/C
4001	SW Key 1st MT Digit	7	N/C
4002	SW Key 2nd MT Digit	8	N/C
4003	SW Key 3rd MT Digit	9	N/C
4004	SW Key 4th MT Digit	5	N/C
4005	SW Key 1st CPU Digit	1	N/C
4006	SW Key 2nd CPU Digit	10	N/C
4007	SW Key 3rd CPU Digit	34	N/C
4008	SW Key 4th CPU Digit	35	N/C
4009	SW Key 5th CPU Digit	36	N/C
4010	SW Key 6th CPU Digit	3	N/C
4011	SW Key 7th CPU Digit	4	N/C
5827	Supply IBM i Lang Group 1 (i7.2)	1	N/C
5872	V7R2M0 Machine Code - RS 720-E(TR2)(29 May 2015)	1	N/C
5900	IBM i License Transfer Document	1	N/C
5921	Supply Media & Storage Extensions (i7.2)	1	N/C
6001	ePoE Registration	1	N/C
6348	IBM i per Proc Transfer Registration	8	N/C
6488	IBM i Unlimited User Transfer Registration (1/2/3 to 6)	1	N/C
	Serial: 000000000	Total	USD 40,000.00

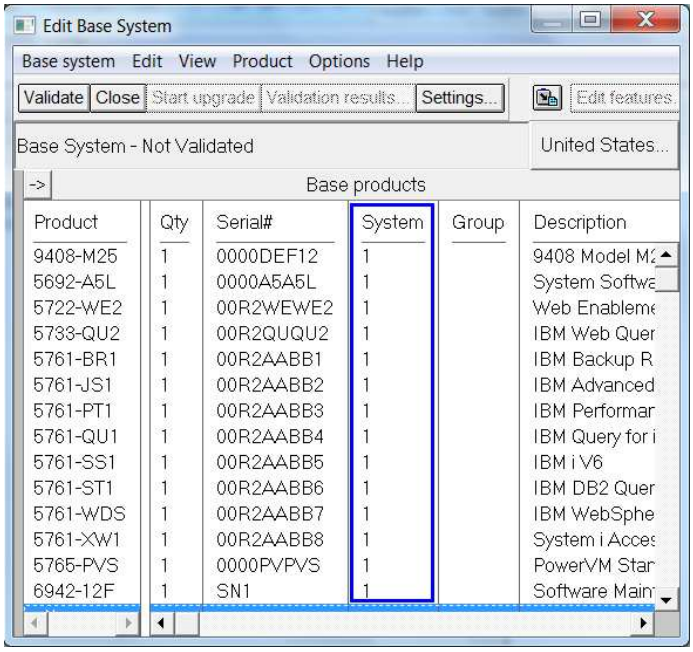
NEWSYS path

In the NEWSYS path you retrieve a donor machine's hardware inventory records and software entitlements, then you configure a new target machine and transfer the donor's software licenses to the new machine. To transfer IBM i entitlements in the NEWSYS path, the donor machine base system can be a stand-alone Power server or a PureFlex, Flex or PurePower System S822 Power compute node, but the new target machine can *only* be a stand-alone Power server -- you cannot configure a new PurePower System or a new PureFlex or Flex Power compute node in the NEWSYS path.

The base system should include the donor machine's hardware inventory, 57xx-SS1 IBM i entitlements[1] (there may be multiple 57xx-SS1 records), IBM i SWMA (5733-SM5, 5733-SU3/SXS, 5733-SPP/SPE/SP3 or 6942-73G/12F) and other licensed program entitlement records. (See the earlier topic "Base systems for the Software Only and NEWSYS paths" for information on what to leave *out* of the base system.)

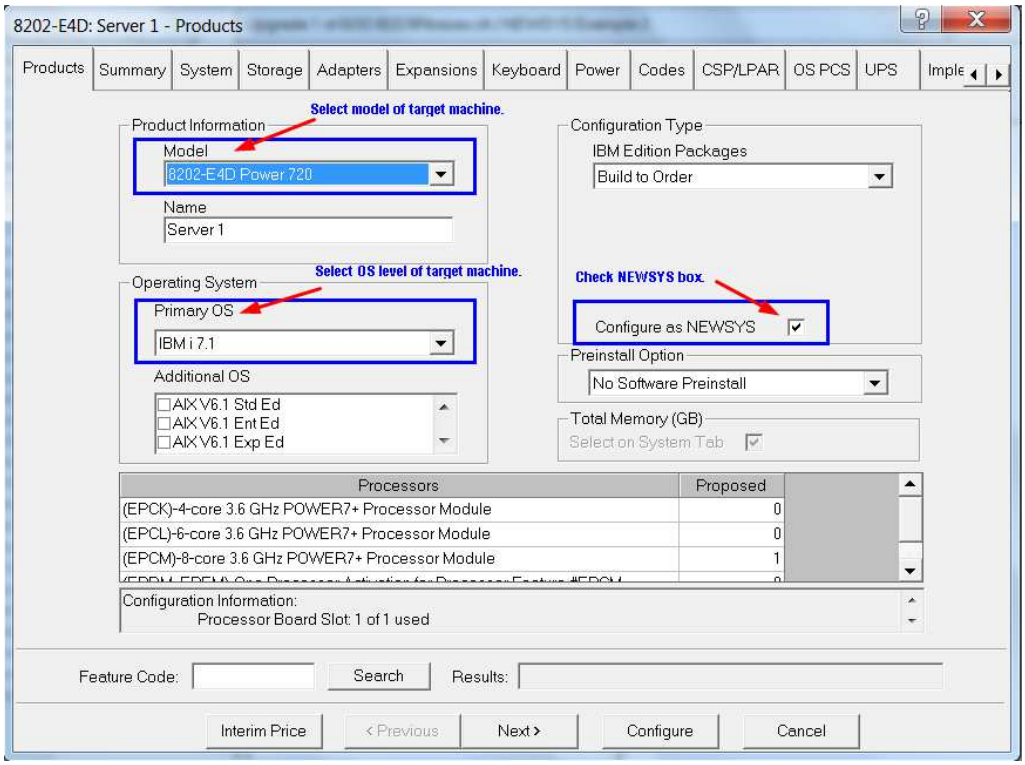
[1] Exception:
If your donor system is entitled for IBM i V5R4 and has either Unlimited users or Collaboration users, make sure to also include 5722-SSC in your base system inventory records. Normally for IBM i we don't need to retrieve billing PIDs, but in this case Unlimited users and Collaboration users once had the same registration feature code for entitlement on the 5722-SS1 order, so e-config needs to look at the 5722-SSC billing PID to determine whether the customer has Unlimited users or Collaboration users.

Before you import your base system into e-config, edit the base and make sure that the System ID is the same on all of the products. If it isn't, you will experience configuration problems. Consult your asset management organization for advice on updating the inventory records so that all of the software and SWMA records have the same system type/number as the donor machine. Once the inventory records have been updated you can retrieve the inventory again and proceed with your configuration.



After validating your base system, start an upgrade. As shown below, edit your donor machine and on the Products tab, check the box "Configure as NEWSYS." If your base system hardware has the feature code for an IBM i primary system, you'll need to respond to a popup message asking whether the customer will need more than fifteen days to migrate from the donor to the target. If you answer "yes," you will also need to configure 5733-ITL for temporary IBM i licensing. See the topic "Temporary

Licensing" for more information. Next change Model to the type/model of your desired target machine. If you want the target machine to have a later version/release of IBM i than the donor, you can change the Primary OS level and e-config will upgrade the software entitlements. Finish configuring the hardware.



Configuration steps to include IBM i license transfer in a NEWSYS configuration

The following examples show how to include IBM i license transfer in a NEWSYS configuration. It is assumed you have already retrieved the donor machine inventory records and configured the new target machine hardware. All sample output shows U.S.A. feature codes and prices. The examples are:

- **Example 1. New 8286-41A at 7.2, transfer two IBM i 6.1 processor entitlements and Unlimited users from donor 9408-M25 and upgrade to 7.2.**

- **Example 2. New 8286-41A at 7.1, transfer six IBM i 7.1 processor entitlements and thirty users from donor 8202-E4C, add two new processors and twenty users and upgrade SWMA to three years with 24x7 support.**

- **Example 3. New 9119-MME at 7.2, transfer twenty IBM i 6.1 processor entitlements from donor 9117-MMA, upgrade to 7.2 and upgrade SWMA to 24x7 support.**

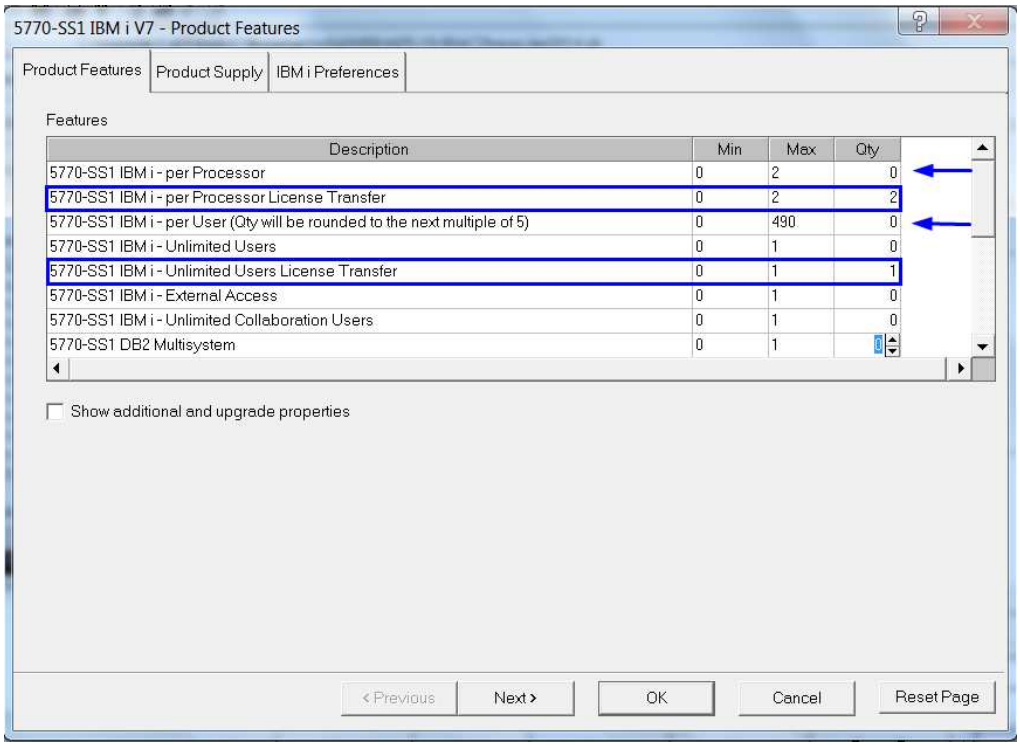
- **Example 4. New 8284-22A at 7.2, transfer two IBM i 7.1 processor entitlements, one hundred users and External Access user entitlement from donor 8202-E4C and upgrade to 7.2.**

The starting point for the examples is the Software Products wizard. For product 57xx-SS1, e-config defaults a quantity of new processor licenses based on your specifications in the hardware wizard, plus a

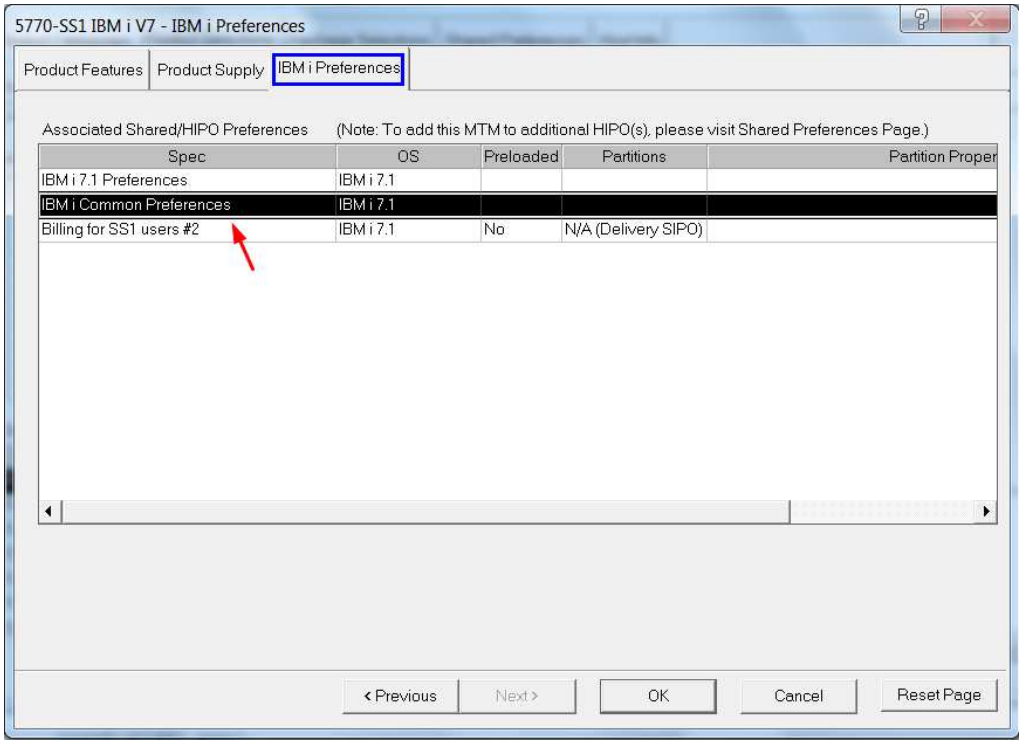
minimum number of new users for models which have user-based IBM i licensing. Once you specify that processors and/or users are to be transferred, e-config will allow you to reset the new processor and/or new user fields to zero, or you can add new processors and/or users at the same time.

NEWSYS example 1

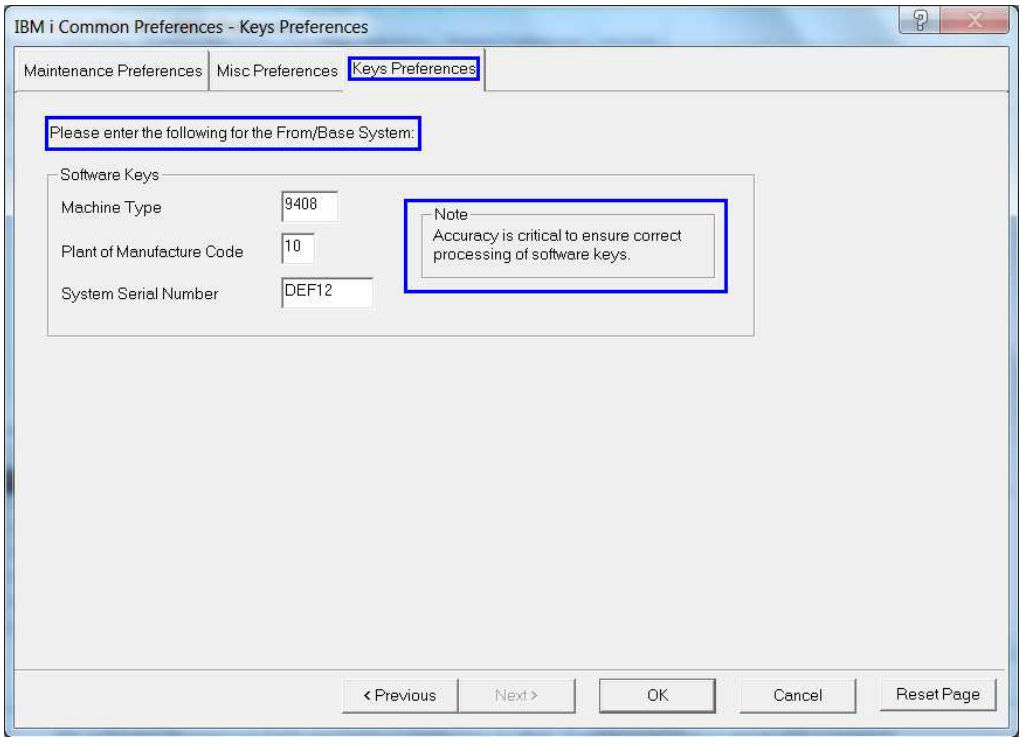
1. In this example we are replacing a 9408-M25 with entitlement for two processors and Unlimited users at IBM i 6.1 with a new 8286-41A 4-core, and transferring and upgrading the software entitlements to 7.2. Begin by editing 5770-SS1 Product Features. Two of the four new processors were de-configured in the hardware wizard, so set the per Processor License Transfer Qty to two, and set the Unlimited Users License Transfer Qty to one. We do not need any new processors or users, so reset the new per Processor and new per User quantities to zero.



2. Next select the IBM i Preferences tab at the top of the screen and double click on IBM i Common Preferences.



3. Select the Keys Preferences tab and enter the Machine Type, Plant of Manufacture Code and System Serial Number of the donor system. Do not guess at the Plant of Manufacture Code (verify on the donor machine if needed).

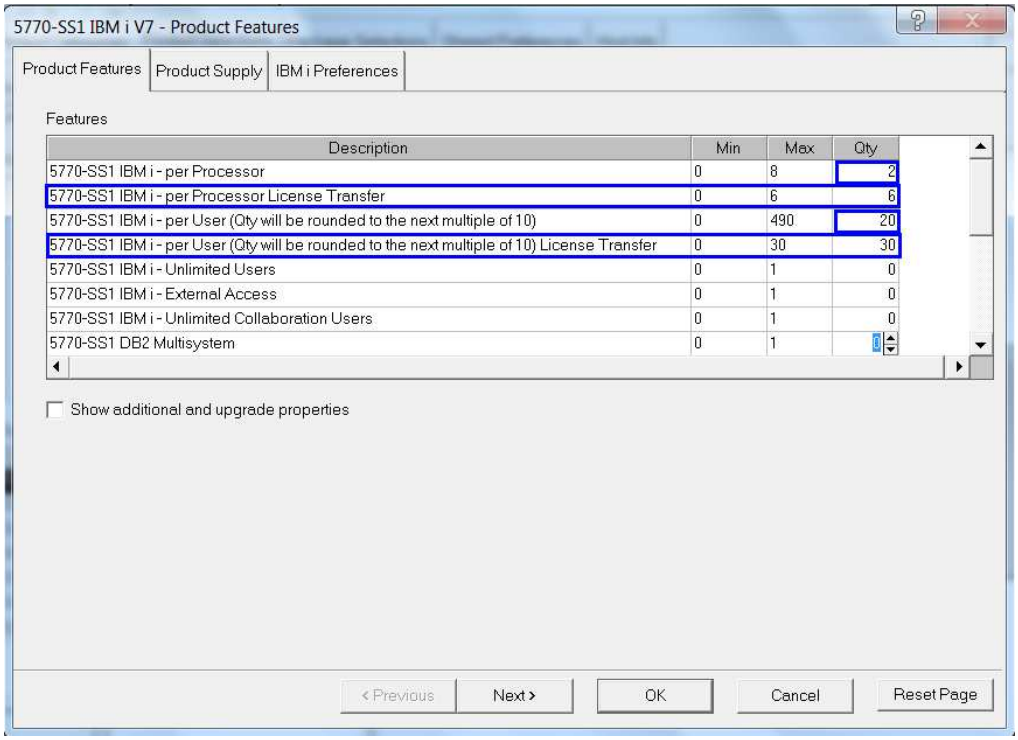


4. For this example we are leaving IBM i Software Maintenance at one year with 9x5 coverage, but if desired we could have selected the Maintenance Preferences tab and made changes. Click "OK" on the Keys Preferences tab and then again on the IBM i Preferences tab, then click "Configure." Validate the configuration. A portion of the configuration output showing new software orders pertinent to our example is shown below. Notice that the IBM i order is for 5770-SS1, because e-config upgraded the 6.1 entitlements from the donor system. The 40xx features on the 5733-NKY order represent the donor machine.

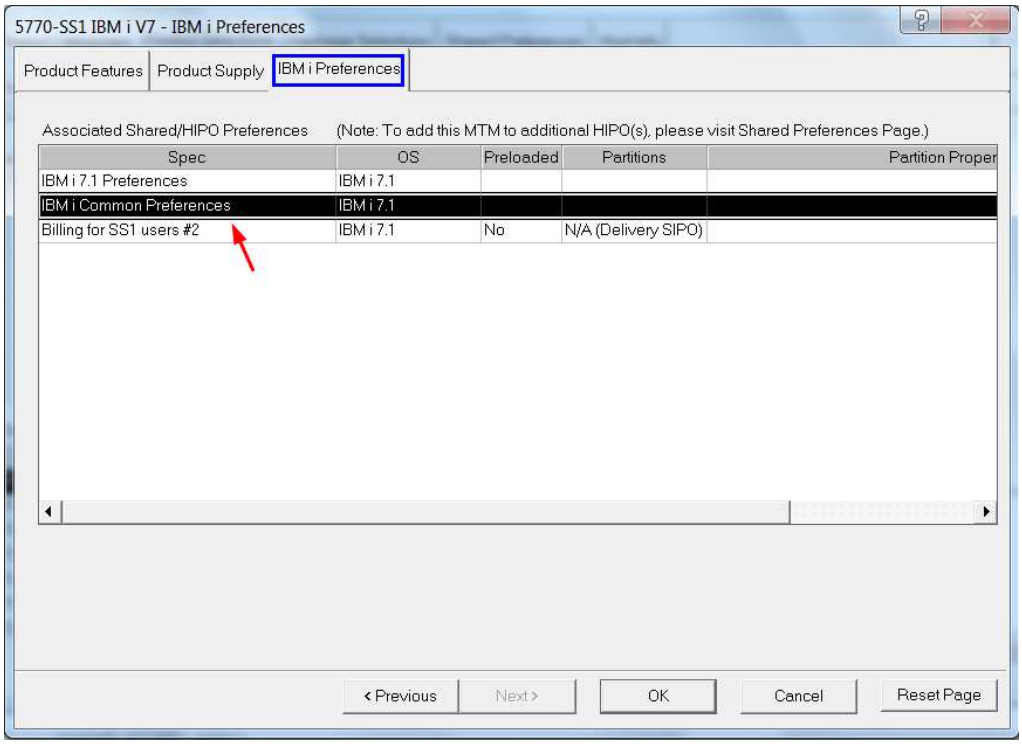
5733-NKY	Deactivate Software Key and ePoE	1	N/C
2508	Query (57xx-QU1)	1	N/C
2511	DB2 Query (57xx-ST1)	1	N/C
2516	Client Access PB (57xx-XW1)	1	N/C
2521	Backup & Recovery Media Services (57xx-BR1)	1	N/C
2525	Performance Tools (57xx-PT1)	1	N/C
2539	IBM i - per Processor (57xx-SS1)	2	N/C
2582	DB2 Web Query for System i (5733-QU2)	1	N/C
2610	Performance Tools Manager (57xx-PT1)	1	N/C
2616	Advance Feature (57xx-BR1)	1	N/C
2617	Network Feature (57xx-BR1)	1	N/C
2619	Media and Storage Extensions (57xx-SS1)	1	N/C
2681	PSF/400 1-55 PPM (57xx-SS1)	1	N/C
2924	English U/L SBCS Primary	1	N/C
4001	SW Key 1st MT Digit V5	9	N/C
4002	SW Key 2nd MT Digit V5	4	N/C
4003	SW Key 3rd MT Digit V5	10	N/C
4004	SW Key 4th MT Digit V5	8	N/C
4005	SW Key 1st CPU Digit V5	1	N/C
4006	SW Key 2nd CPU Digit V5	10	N/C
4007	SW Key 3rd CPU Digit V5	14	N/C
4008	SW Key 4th CPU Digit V5	15	N/C
4009	SW Key 5th CPU Digit V5	16	N/C
4010	SW Key 6th CPU Digit V5	1	N/C
4011	SW Key 7th CPU Digit V5	2	N/C
5809	5733-ITL Info Letter	1	N/C
6482	IBM i - Unlimited User (57xx-SS1)	1	N/C
	Serial: 000000000	Total	USD 0.00
5733-SPP	IBM Software Maintenance for IBM i and Selected Products, 1-Year Registration	1	N/C
4907	P05 0Price Per Proc 1Yr Reg	2	N/C
9000	SWMA Renewal Registration	1	N/C
	Serial: 000000000	Total	USD 0.00
5770-SS1	IBM i V7	1	N/C
0492	BOTC Upg PSF 1-55 PPM (from 5761-SS1)	1	N/C
1063	BOTC Upg MSE (from 5761-SS1)	1	N/C
1448	OTC per IBM i license transfer	2	10,000.00
3441	LPAR System Indicator	1	N/C
3450	Electronic SW Delivery (ESD)	1	N/C
5827	Supply IBM i Lang Group 1 (i7.2)	1	N/C
5872	V7R2M0 Machine Code - RS 720-E(TR2)(29 May 2015)	1	N/C
5900	IBM i License Transfer Document	1	N/C
5921	Supply Media & Storage Extensions (i7.2)	1	N/C
5926	Supply PSF/400 1-55 PPM (i7.2)	1	N/C
6001	ePoE Registration	1	N/C
6348	IBM i per Proc Transfer Registration	2	N/C
6352	IBM i Unlimited User Transfer Registration	1	N/C
	Serial: 000000000	Total	USD 10,000.00

NEWSYS example 2

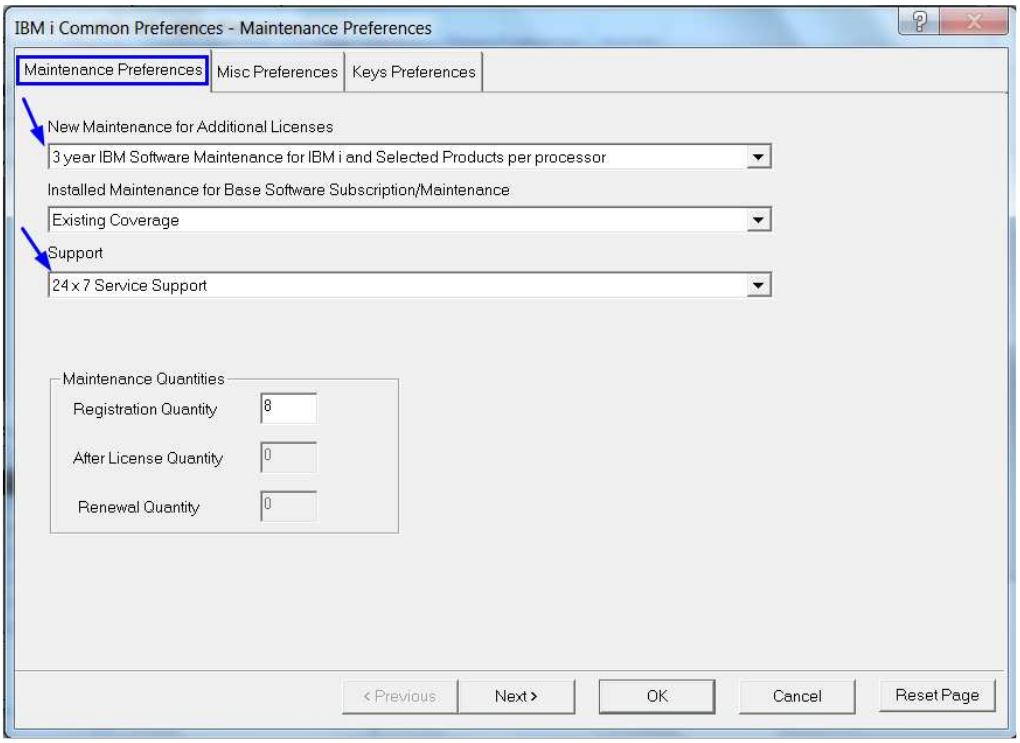
1. In this example we are replacing an 8202-E4C which has IBM i 7.1 entitlement for six processors and thirty users with a new 8286-41A 8-core at 7.1. We are transferring all software entitlements and adding two new processor entitlements and twenty new users. We are also upgrading SWMA to three years with 24x7 support. Begin by editing 5770-SS1 Product Features. Set the per Processor and per User quantities to two and twenty, respectively, and set the per Processor License Transfer and per User License Transfer quantities to six and thirty, respectively.



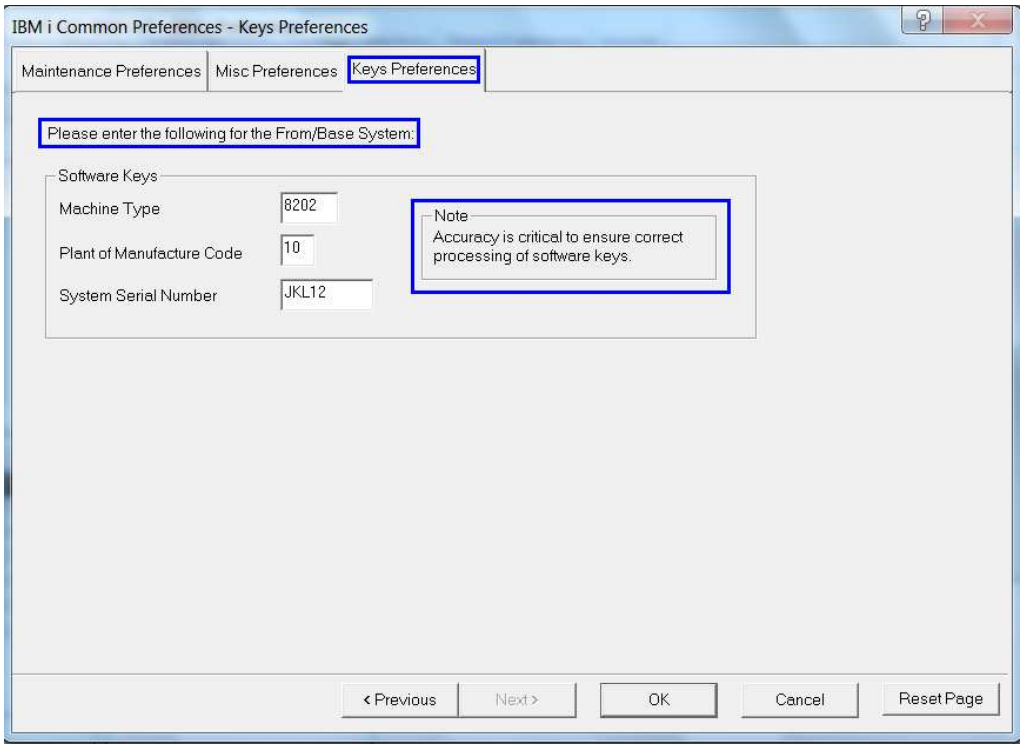
2. Next select the IBM i Preferences tab at the top of the screen and double click on IBM i Common Preferences.



3. Select the Maintenance Preferences tab and choose three year SWMA with 24x7 support.



4. Next select the Keys Preferences tab and enter the Machine Type, Plant of Manufacture Code and System Serial Number of the donor system. Do not guess at the Plant of Manufacture Code (verify on the donor system if needed).

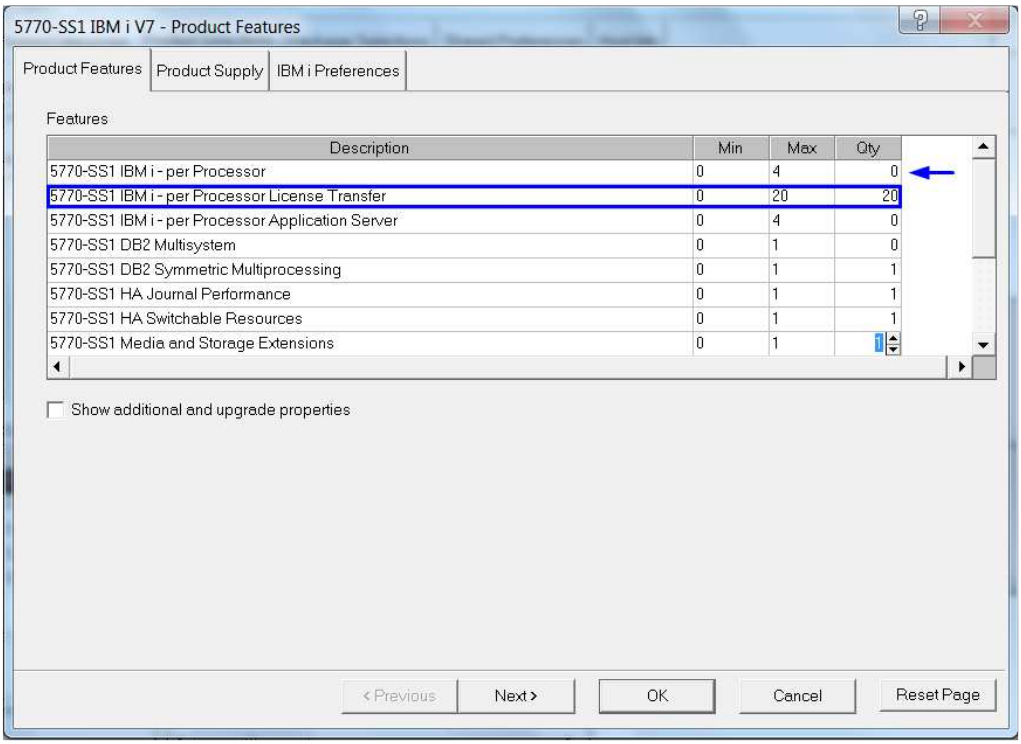


5. Click "OK" on the Keys Preferences tab and then again on the IBM i Preferences tab, then click "Configure." Validate the configuration. A portion of the configuration output showing new software orders pertinent to our example is shown below. The 40xx features on the 5733-NKY order represent the donor machine.

5733-NKY	Deactivate Software Key and ePoE	1	N/C
2508	Query (57xx-QU1)	1	N/C
2511	DB2 Query (57xx-ST1)	1	N/C
2516	Client Access PB (57xx-XW1)	1	N/C
2521	Backup & Recovery Media Services (57xx-BR1)	1	N/C
2525	Performance Tools (57xx-PT1)	1	N/C
2539	IBM i - per Processor (57xx-SS1)	6	N/C
2586	Web Enablement for i5/OS (5722-WE2 V7.0)	1	N/C
2602	Encrypted Backup Enablement (57xx-SS1)	1	N/C
2610	Performance Tools Manager (57xx-PT1)	1	N/C
2617	Network Feature (57xx-BR1)	1	N/C
2619	Media and Storage Extensions (57xx-SS1)	1	N/C
2700	Web Query for i - Base Core (5733-WQX)	1	N/C
2704	Web Query for i - Auth User (5733-WQX)	1	N/C
2924	English U/L SBCS Primary	1	N/C
4001	SW Key 1st MT Digit V5	8	N/C
4002	SW Key 2nd MT Digit V5	2	N/C
4003	SW Key 3rd MT Digit V5	10	N/C
4004	SW Key 4th MT Digit V5	2	N/C
4005	SW Key 1st CPU Digit V5	1	N/C
4006	SW Key 2nd CPU Digit V5	10	N/C
4007	SW Key 3rd CPU Digit V5	20	N/C
4008	SW Key 4th CPU Digit V5	21	N/C
4009	SW Key 5th CPU Digit V5	22	N/C
4010	SW Key 6th CPU Digit V5	1	N/C
4011	SW Key 7th CPU Digit V5	2	N/C
5809	5733-ITL Info Letter	1	N/C
6481	IBM i - per User block of 5 (57xx-SS1)	6	N/C
	Serial: 000000000	Total	USD 0.00
5733-SP3	IBM Software Maintenance for IBM i and Selected Products, 3-Year Registration	1	N/C
0004	P10 0Price Per Proc 3Yr Reg	8	N/C
0006	P10 Registration/Renewal 24x7	8	7,408.00
	Serial: 000000000	Total	USD 7,408.00
5733-SPE	IBM Software Maintenance for IBM i and Selected Products, 3-Year Extended Registration	1	N/C
4943	P10 Per Processor 3Yr Reg	8	47,600.00
	Serial: 000000000	Total	USD 47,600.00
5770-SS1	IBM i V7	1	N/C
1448	OTC per IBM i license transfer	6	30,000.00
1525	IBM i per Core (E4x/41A)	2	N/C
3441	LPAR System Indicator	1	N/C
3450	Electronic SW Delivery (ESD)	1	N/C
5817	Supply IBM i Lang Group 1 (i7.1)	1	N/C
5870	V7R1M0 Machine Code - RS 710-N(TR10)(29 May 2015)	1	N/C
5900	IBM i License Transfer Document	1	N/C
5911	Supply Media & Storage Extensions (i7.1)	1	N/C
5915	Supply Encrypted Backup Enablement (i7.1)	1	N/C
6000	IBM i per Core Registration	2	N/C
6001	ePoE Registration	1	N/C
6100	IBM i per 5 Users Registration	4	N/C
6101	ePoE Registration - MSE	1	N/C
6289	IBM i Access Client Solutions (XJ1/XH2)	1	N/C
6348	IBM i per Proc Transfer Registration	6	N/C
6351	IBM i per User Transfer Registration (blk of 5)	6	N/C
6510	P10 ePoE Registration - Encrypted Backup	1	N/C
7010	Setup and Operation CD i7.1	1	N/C
	Serial: 000000000	Total	USD 30,000.00
5770-SSA	IBM i per Processor License Billing	1	N/C
1550	OTC per Core w/ 1-Year SWMA (E4x/41A 6/8-Core)	2	29,990.00
	Serial: 000000000	Total	USD 29,990.00
5770-SSC	IBM i per User Billing	1	N/C
1562	OTC per 10 Users (E4x/41A 6/8-Core)	2	5,000.00
	Serial: 000000000	Total	USD 5,000.00

NEWSYS example 3

1. In this example we are replacing a 9117-MMA which has IBM i 6.1 entitlement for twenty processors with a new 9119-MME and transferring and upgrading the software entitlements to 7.2. We are also upgrading SWMA to 24x7 support. Begin by editing 5770-SS1 Product Features. Set the per Processor License Transfer Qty to twenty, and since we do not need any new processors, reset the per Processor Qty to zero.



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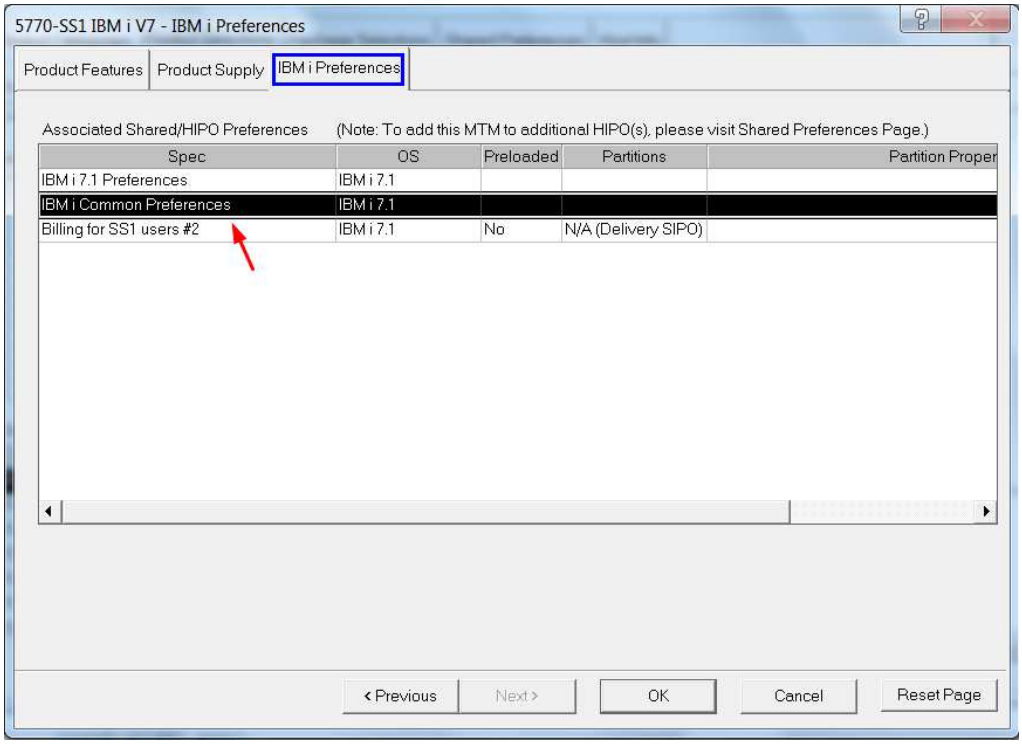
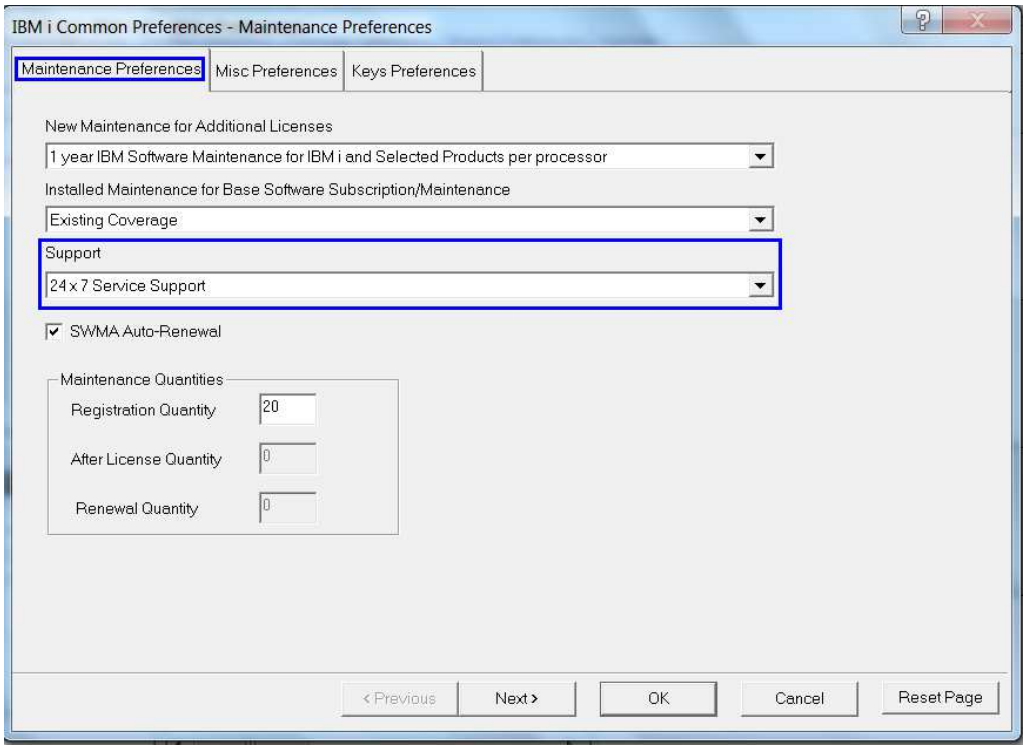
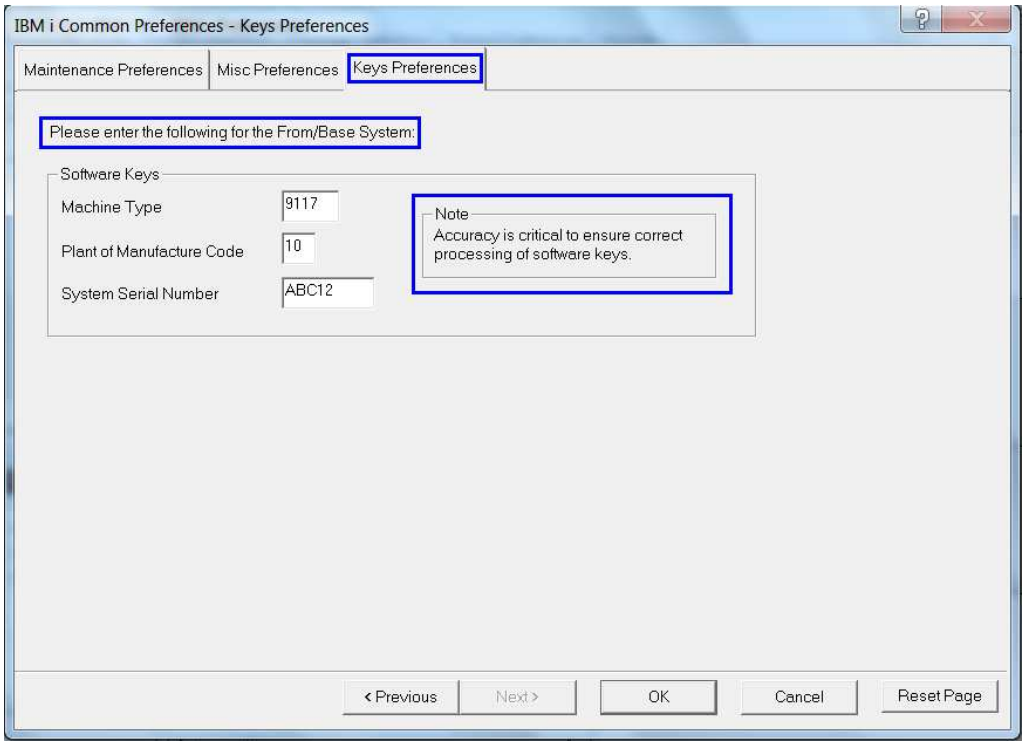
2. Next select the IBM i Preferences tab at the top of the screen and double click on IBM i Common Preferences.



3. Select the Maintenance Preferences tab and set Support to 24x7.



4. Next select the Keys Preferences tab and enter the Machine Type, Plant of Manufacture Code and System Serial Number of the donor system. Do not guess at the Plant of Manufacture Code (verify on the donor system if needed).



5. Click "OK" on the Keys Preferences tab and then again on the IBM i Preferences tab, then click "Configure." Validate the configuration. A portion of the configuration output showing new software orders pertinent to our example is shown below. Notice that the IBM i order is for 5770-SS1, because e-config upgraded the 6.1 entitlements from the donor system. The 40xx features on the 5733-NKY order represent the donor machine.

```
5733-NKY  Deactivate Software Key and ePoE                1          N/C
    2539  IBM i - per Processor (57xx-SS1)                20          N/C
    2619  Media and Storage Extensions (57xx-SS1)          1          N/C
    2622  DB2 Symmetric Multiprocessing (5722-SS1)         1          N/C
    2685  HA Switchable Resources (57xx-SS1)               1          N/C
    2686  HA Journal Performance (57xx-SS1)                1          N/C
    2924  English U/L SBCS Primary                         1          N/C
    4001  SW Key 1st MT Digit V5                           9          N/C
    4002  SW Key 2nd MT Digit V5                           1          N/C
    4003  SW Key 3rd MT Digit V5                           1          N/C
    4004  SW Key 4th MT Digit V5                           7          N/C
    4005  SW Key 1st CPU Digit V5                          1          N/C
    4006  SW Key 2nd CPU Digit V5                         10          N/C
    4007  SW Key 3rd CPU Digit V5                         11          N/C
    4008  SW Key 4th CPU Digit V5                         12          N/C
    4009  SW Key 5th CPU Digit V5                         13          N/C
    4010  SW Key 6th CPU Digit V5                          1          N/C
    4011  SW Key 7th CPU Digit V5                          2          N/C
    5809  5733-ITL Info Letter                             1          N/C

          Serial: 000000000                          Total      USD 0.00

5733-SPP  IBM Software Maintenance for IBM i and Selected
          Products, 1-Year Registration                    1          N/C
    4916  P30 0Price Per Proc 1Yr Reg                     20          N/C
    4918  P30 Registration/Renewal 24x7                   20    13,720.00
    9000  SWMA Renewal Registration                        1          N/C

          Serial: 000000000                          Total  USD 13,720.00
```

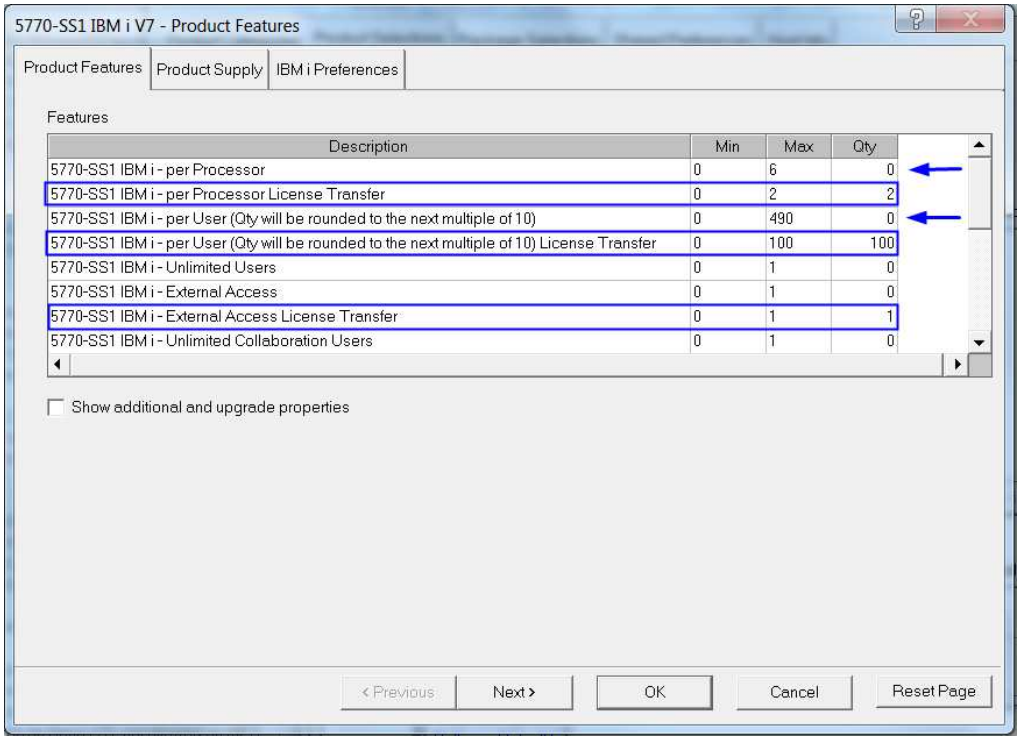
5770-SS1	IBM i V7	1	N/C
0437	P30 OTC Upg HA Journal Perf (from 5761-SS1)	1	N/C
0457	P30 OTC Upg HA Switchable Res (from 5761-SS1)	1	N/C
0794	P30 OTC Upg DB2 SMP (from 5761-SS1)	1	N/C
1063	BOTC Upg MSE (from 5761-SS1)	1	N/C
1448	OTC per IBM i license transfer	20	100,000.00
3441	LPAR System Indicator	1	N/C
3450	Electronic SW Delivery (ESD)	1	N/C
5827	Supply IBM i Lang Group 1 (i7.2)	1	N/C
5872	V7R2M0 Machine Code - RS 720-E(TR2)(29 May 2015)	1	N/C
5900	IBM i License Transfer Document	1	N/C
5921	Supply Media & Storage Extensions (i7.2)	1	N/C
5923	Supply DB2 Symmetric Multiprocessing (i7.2)	1	N/C
5939	Supply HA Switchable Resources (i7.2)	1	N/C
5940	Supply HA Journal Performance (i7.2)	1	N/C
6001	ePoE Registration	1	N/C
6348	IBM i per Proc Transfer Registration	20	N/C
	Serial: 000000000	Total	USD 100,000.00

NEWSYS example 4

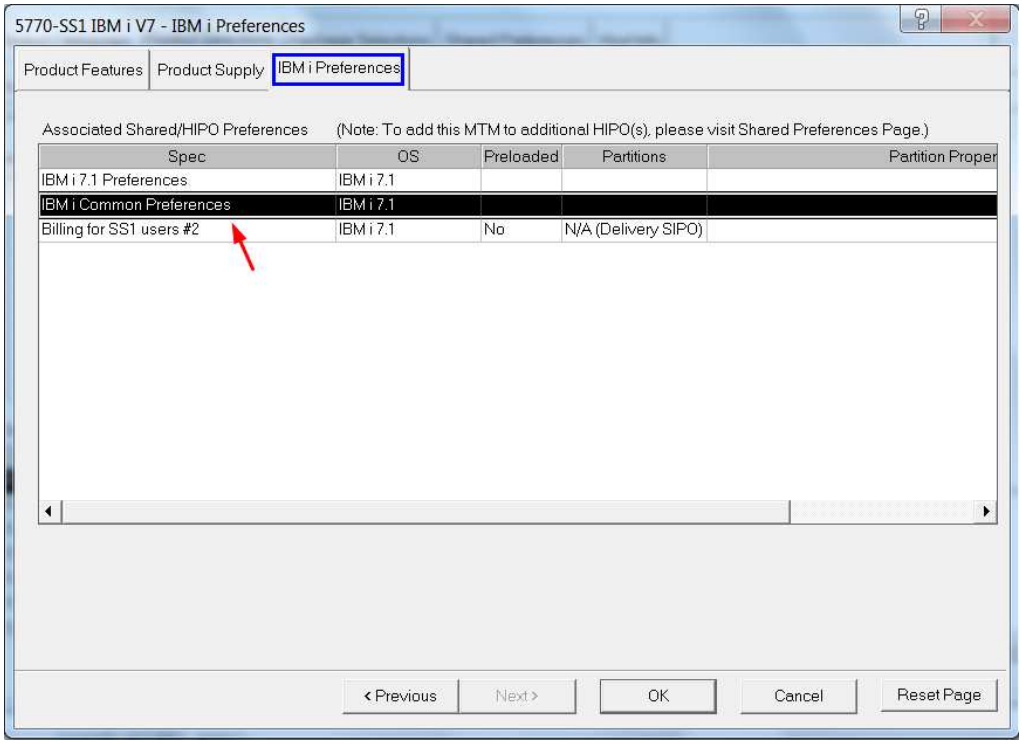
In October of 2015, support for IBM i on the **Power S822** (8284-22A) was announced with special terms and conditions. Virtual I/O Server (VIOS) is one of the requirements. IBM i cannot be selected as the Primary OS for a stand-alone S822 server on the Products tab in e-config. Instead select VIO or another operating system as the Primary OS, and IBM i 7.x as an Additional OS. You will then be able to configure IBM i as new or transferred entitlements in the software wizard.

Also note there is a maximum of two cores per IBM i partition allowed on an S822, although you can have multiple IBM i partitions. E-config will let you specify more than two IBM i processor entitlements (either new or transferred or in combination) on an S822; it is the customer's responsibility to adhere to the two core maximum per IBM i partition limit.

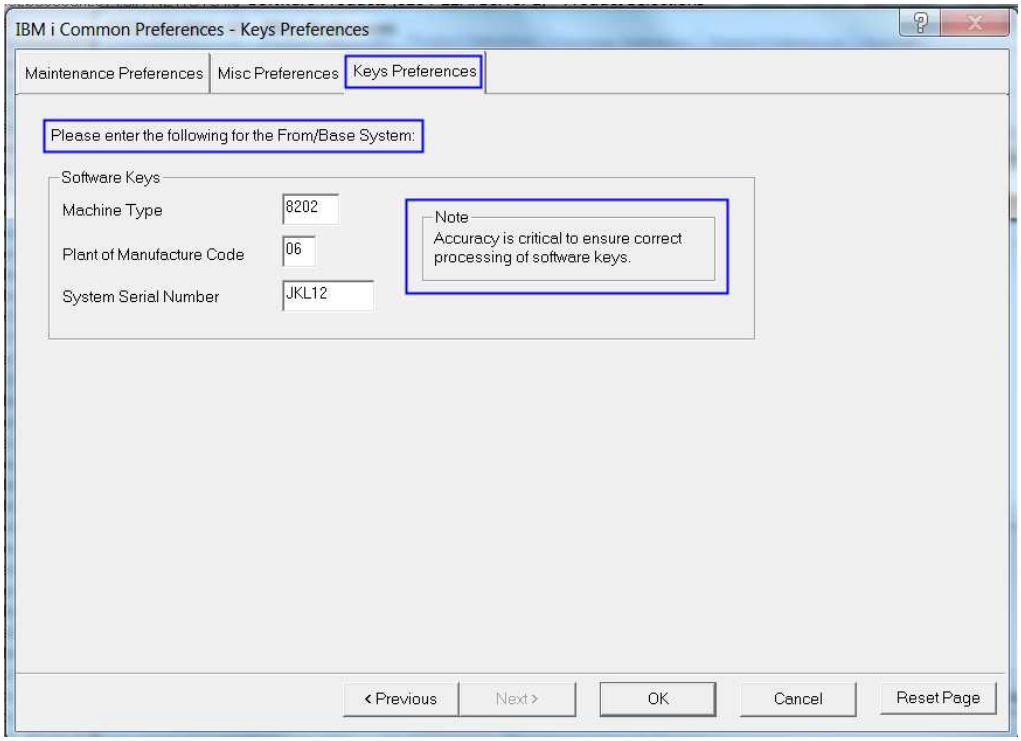
1. In this example we are replacing an 8202-E4C which has IBM i 7.1 entitlement for two processors, one hundred users and External Access users with a new 8284-22A and transferring and upgrading the software entitlements to 7.2. Begin by editing 5770-SS1 Product Features. Set the per Processor License Transfer Qty to two; we do not need any new processor licenses so reset the per Processor Qty to zero. Set the per User License Transfer Qty to one hundred and the External Access License Transfer Qty to one. We do not need any new users, so reset the new per User Qty to zero.



2. Next select the IBM i Preferences tab at the top of the screen and double click on IBM i Common Preferences.



3. Select the Keys Preferences tab and enter the Machine Type, Plant of Manufacture Code and System Serial Number of the donor system. Do not guess at the Plant of Manufacture Code (verify on the donor machine if needed).



5. Click "OK" on the Keys Preferences tab and then again on the IBM i Preferences tab, then click "Configure." Validate the configuration. A portion of the configuration output showing new software orders pertinent to our example is shown below. Notice that the 5770-SS1 IBM i order has 7.2 media features, because e-config upgraded the 7.1 entitlements from the donor system. The 40xx features on the 5733-NKY order represent the donor machine.

```
5733-NKY  Deactivate Software Key and ePoE                1          N/C
    2539  IBM i - per Processor (57xx-SS1)                2          N/C
    2924  English U/L SBCS Primary                        1          N/C
    4001  SW Key 1st MT Digit V5                          8          N/C
    4002  SW Key 2nd MT Digit V5                          2          N/C
    4003  SW Key 3rd MT Digit V5                         10          N/C
    4004  SW Key 4th MT Digit V5                          2          N/C
    4005  SW Key 1st CPU Digit V5                        10          N/C
    4006  SW Key 2nd CPU Digit V5                         6          N/C
    4007  SW Key 3rd CPU Digit V5                        20          N/C
    4008  SW Key 4th CPU Digit V5                        21          N/C
    4009  SW Key 5th CPU Digit V5                        22          N/C
    4010  SW Key 6th CPU Digit V5                         1          N/C
    4011  SW Key 7th CPU Digit V5                         2          N/C
    5809  5733-ITL Info Letter                            1          N/C
    6481  IBM i - per User block of 5 (57xx-SS1)         20          N/C
    6484  IBM i - External Access (57xx-SS1)              1          N/C

          Serial: 000000000                         Total       USD 0.00

5733-SPP  IBM Software Maintenance for IBM i and Selected
          Products, 1-Year Registration                   1          N/C
    4910  P10 0Price Per Proc 1Yr Reg                     2          N/C
    9000  SWMA Renewal Registration                       1          N/C

          Serial: 000000000                         Total       USD 0.00
```

5770-SS1	IBM i V7	1	N/C
1448	OTC per IBM i license transfer	2	10,000.00
3441	LPAR System Indicator	1	N/C
3450	Electronic SW Delivery (ESD)	1	N/C
5827	Supply IBM i Lang Group 1 (i7.2)	1	N/C
5872	V7R2M0 Machine Code - RS 720-F(TR3)(20 Nov 2015)	1	N/C
5900	IBM i License Transfer Document	1	N/C
6001	ePoE Registration	1	N/C
6348	IBM i per Proc Transfer Registration	2	N/C
6351	IBM i per User Transfer Registration (blk of 5)	20	N/C
6354	IBM i External Access Transfer Registration	1	N/C
	Serial: 000000000	Total	USD 10,000.00

Initial Order path

Beginning in June of 2013, e-config was updated to allow the transfer of IBM i processor and user entitlements to new **PureFlex and Flex Power compute nodes** during initial order configurations. This allows the IBM i license transfer charges to be priced and ordered in the same configuration file with a new PureFlex or Flex Power compute node, similar to the NEWSYS path for stand-alone Power servers. For a number of technical reasons it was unworkable to implement NEWSYS for PureFlex and Flex, so the Initial Order path for PureFlex and Flex systems was enhanced to provide some of the equivalent function.

In October of 2015, support for IBM i on the **Power S822** (8284-22A) was announced on both stand-alone S822 servers and PurePower System S822 Power compute nodes. IBM i processor and user entitlement transfer to a new PurePower System S822 Power compute node can be done during the Initial Order configuration of the PurePower System. To transfer IBM i processor and user entitlements to a new stand-alone S822 server, use the e-config NEWSYS path.

There are limitations in the Initial Order path. You can only specify the transfer of IBM i operating system processor and user entitlements. You need to do a separate Software Only configuration to transfer optional features of IBM i and other eligible licensed program products to the new PureFlex, Flex or S822 Power compute node once you know its new serial number. Also, because there is no retrieval of donor machine software entitlement records with an Initial Order configuration as there is with NEWSYS, e-config cannot do any validation of the IBM i software entitlements for you at configuration time. However special feature codes used for registering entitlement transfers to PureFlex, Flex and S822 Power compute nodes will allow the Power Systems Software Compliance and Entitlement Support team and the Key Center to perform donor system eligibility and entitlement verification after the license transfer orders are placed. Please review the *IBM i Processor and User Transfer* guide to make sure your donor system meets all the eligibility requirements before proposing IBM i license transfer. In particular, make certain that the donor system has active SWMA, and verify that the SWMA coverage is still in effect at the time your license transfer orders are actually placed.

When you transfer processor entitlements from donor machines in transfer groups 1, 2 or 3 to an eligible[1] transfer group 6 PureFlex or Flex Power compute node, an unlimited user entitlement is automatically created for the target node at no additional charge (see configuration example 4 below). Also note Application Server processor entitlements cannot be transferred to PureFlex or Flex Power compute nodes. Entitlement transfers from group 1, 2 or 3 machines to an S822 are not allowed.

[1] Transfer of processor entitlements from donor machines in transfer groups 1, 2 or 3 to group 6 PureFlex or Flex System p260 7895-23A is not offered.

Configuration steps to include IBM i license transfer in a new PureFlex or Flex configuration

The following examples show how to include IBM i license transfer during an initial order configuration of a new PureFlex or Flex Power compute node. It is assumed you have already configured the hardware for the Power node(s) that will run IBM i. All sample output shows U.S.A. feature codes and prices. The examples are:

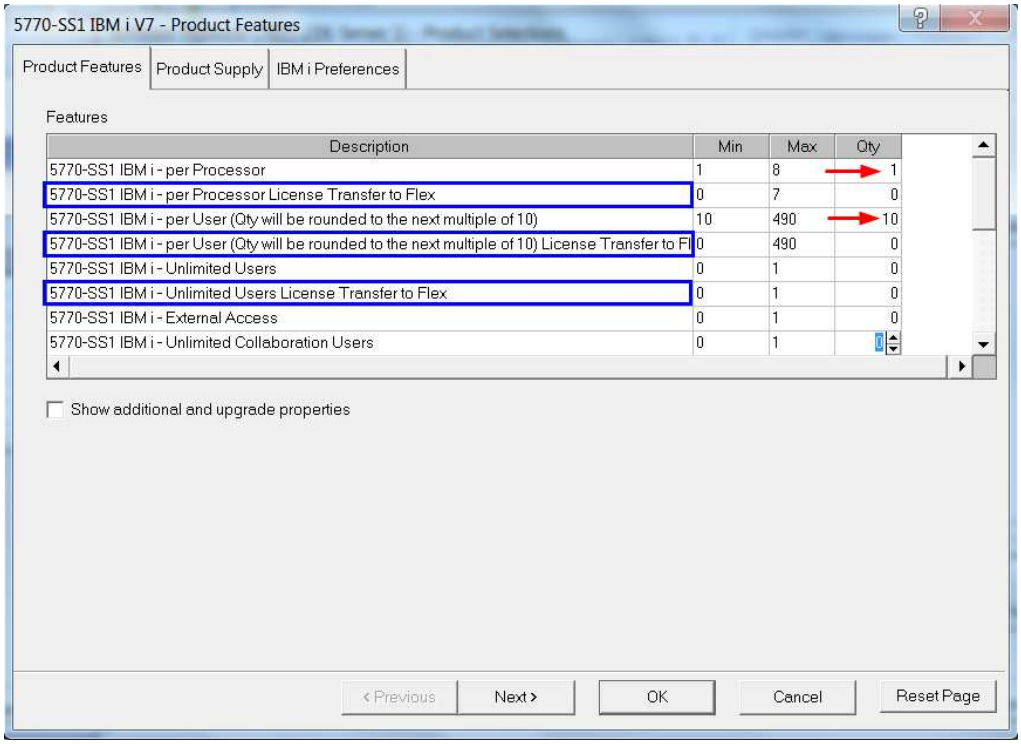
- **Example 1. Transfer two IBM i processor entitlements and twenty users from a group 4 donor**

- **Example 2. Transfer four IBM i processor entitlements and fifty users from a group 5 donor, add thirty new users and upgrade SWMA to 24x7 support**

- **Example 3. Transfer six IBM i processor entitlements and Unlimited users from a group 5 donor, add two new IBM i processor entitlements and upgrade SWMA to three years with 24x7 support**

- **Example 4. Transfer sixteen IBM i processor entitlements from a group 2 donor and receive entitlement for Unlimited users**

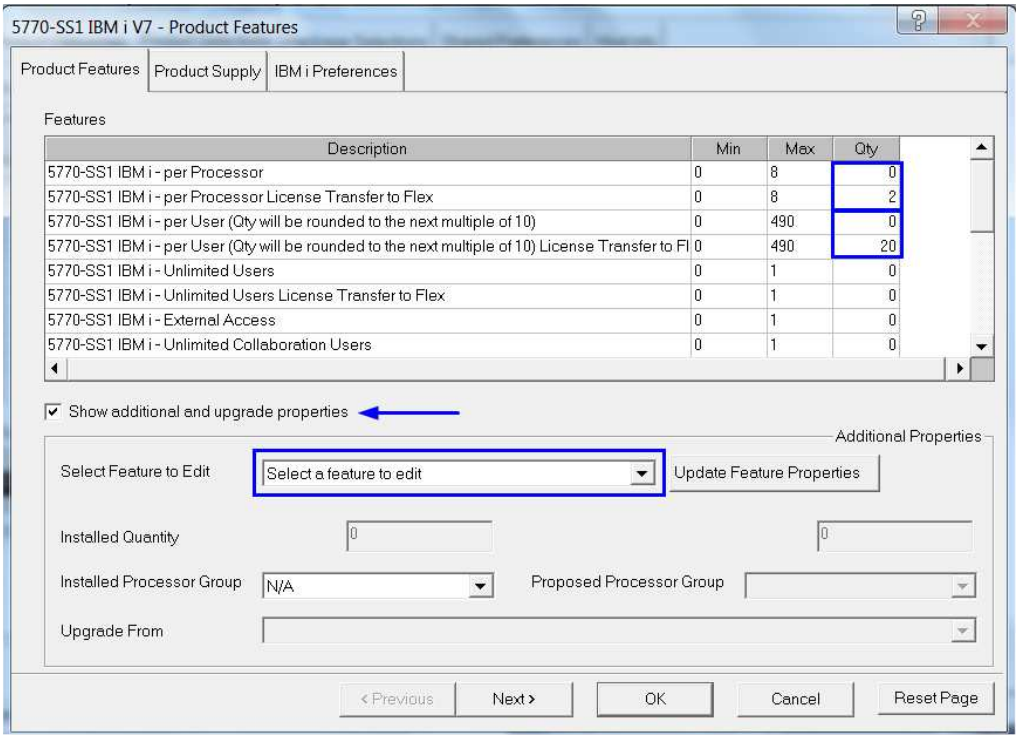
The starting point for all examples is the Software Products wizard for the applicable Power node. Begin by editing product 5770-SS1. The screen capture below shows the options for specifying the transfer of processor, user and Unlimited user entitlements to a Power compute node. E-config defaults to requiring one new processor entitlement and either ten new users on software tier P10 models or five new users on software tier P05 models. Once you specify that processors and/or users are to be transferred, e-config will allow you to reset the new processor and/or new user fields to zero, or you can add new processors and/or users at the same time. (Note the prompt text says "Flex" regardless of whether you are configuring a PureFlex or a Flex node.)



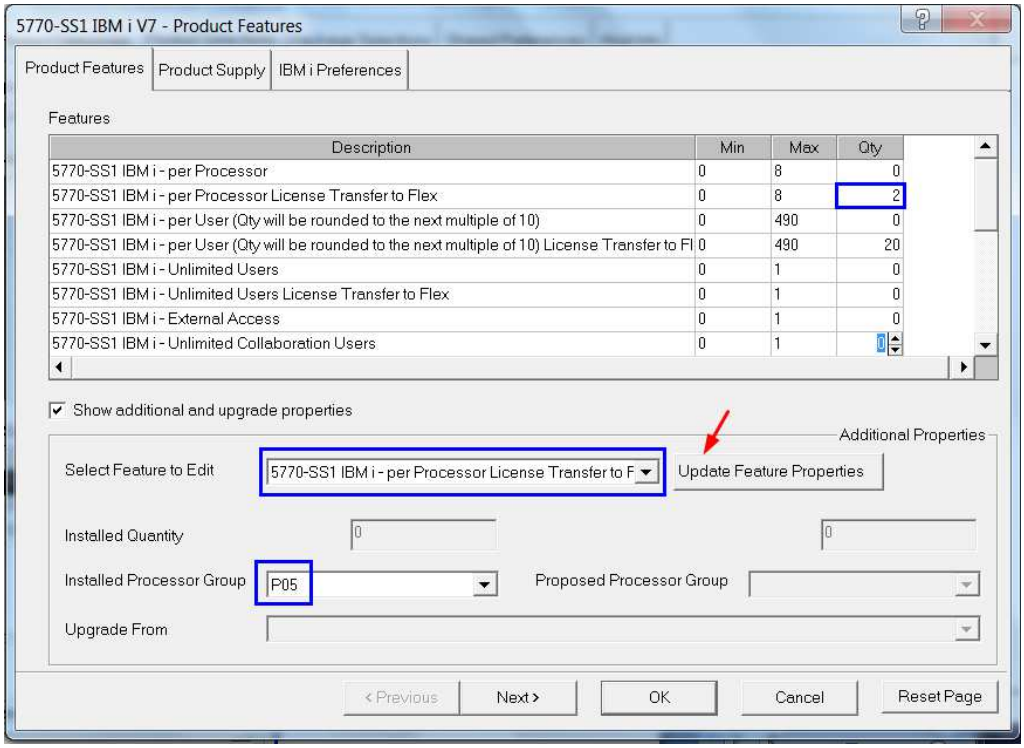
Initial Order example 1

1. In this example we are transferring two IBM i processor entitlements and twenty users from an 8202-E4C to a new Power node but not adding any new processors or users -- all the entitlements will be transferred entitlements. Begin by editing 5770-SS1 Product Features. Set the per Processor License Transfer and per User License Transfer quantities to two and twenty, respectively, and reset the per Processor and per User quantities to zero. The next step is to check the "Show additional and upgrade properties" box, which populates the lower portion of the screen. We need to tell e-config the tier

group of the software entitlements we are transferring. We are transferring both processor and user entitlements, so we will need to select each feature in turn.



2. Select the IBM i per Processor License Transfer feature to edit and set the Installed Processor Group to P05. Note if you are transferring both processor and user entitlements, they must be the same group level. **Click the "Update Feature Properties" button to confirm**.



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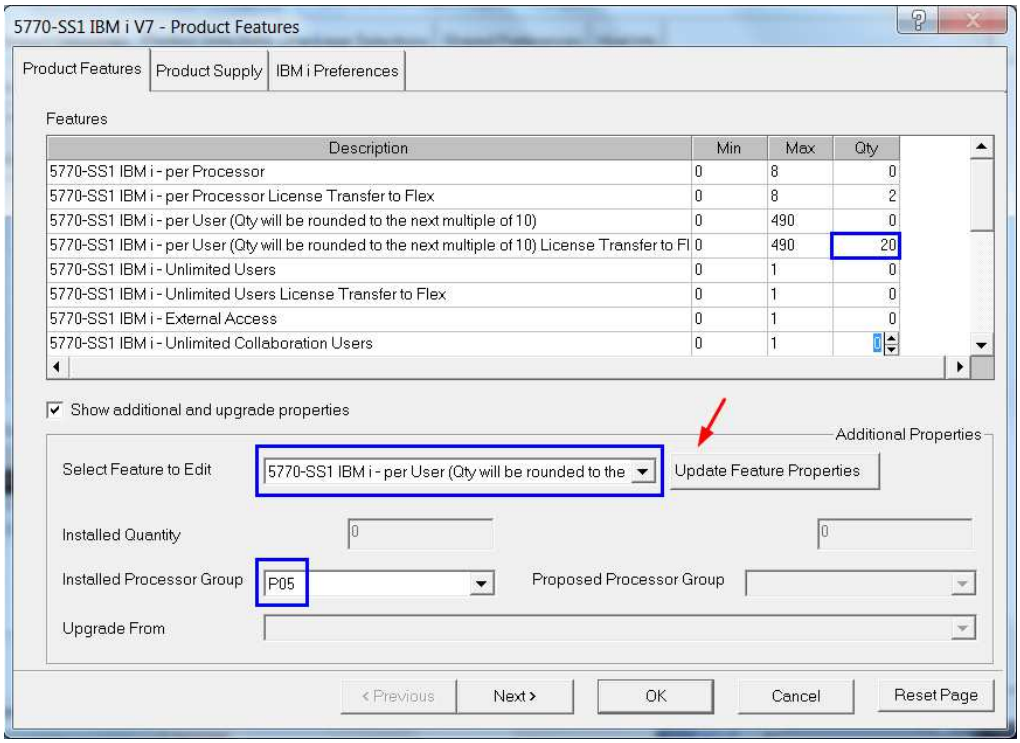
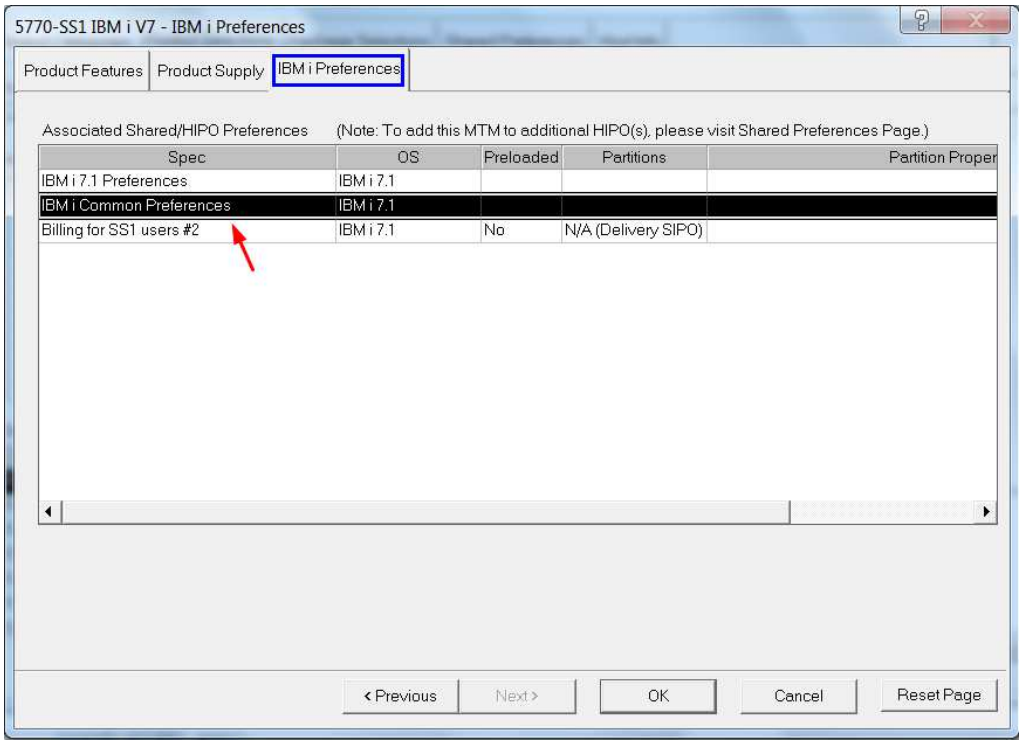
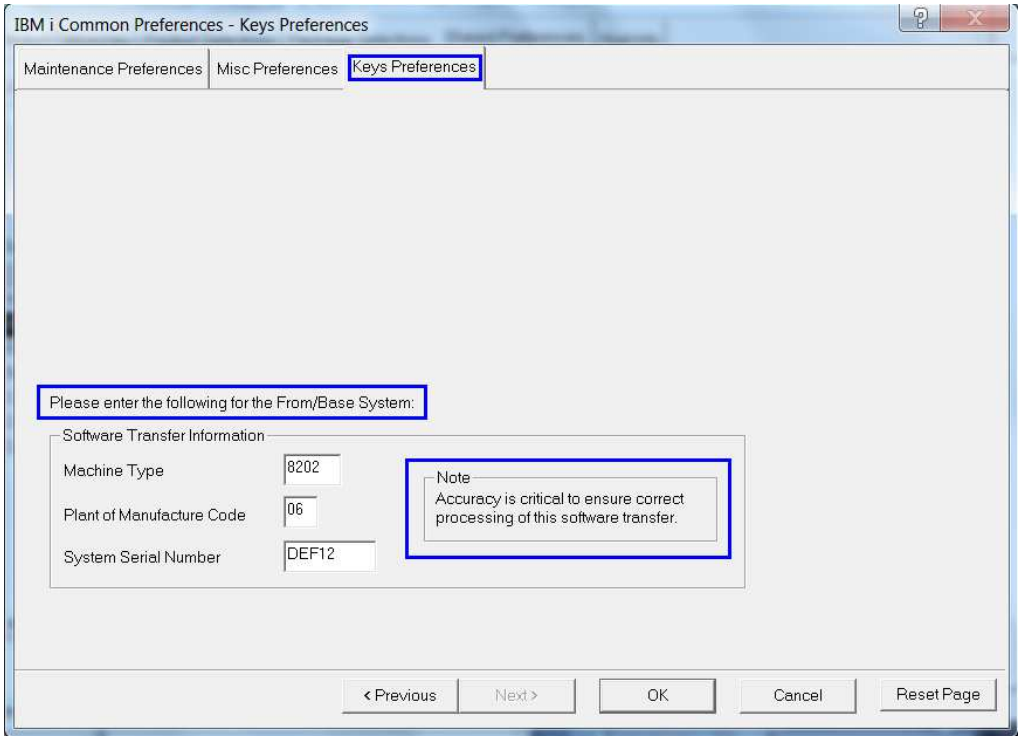
3. Next select the IBM i per User License Transfer feature to edit and set the Installed Processor Group to P05. Remember if you are transferring both processor and user entitlements, they must be the same group level. **Click the Update Feature Properties button to confirm**.



4. Next select the IBM i Preferences tab at the top of the screen and double click on IBM i Common Preferences.



5. Select the Keys Preferences tab and enter the Machine Type, Plant of Manufacture Code and System Serial Number of the donor machine. Do not guess at the Plant of Manufacture Code (verify on the donor system if needed).

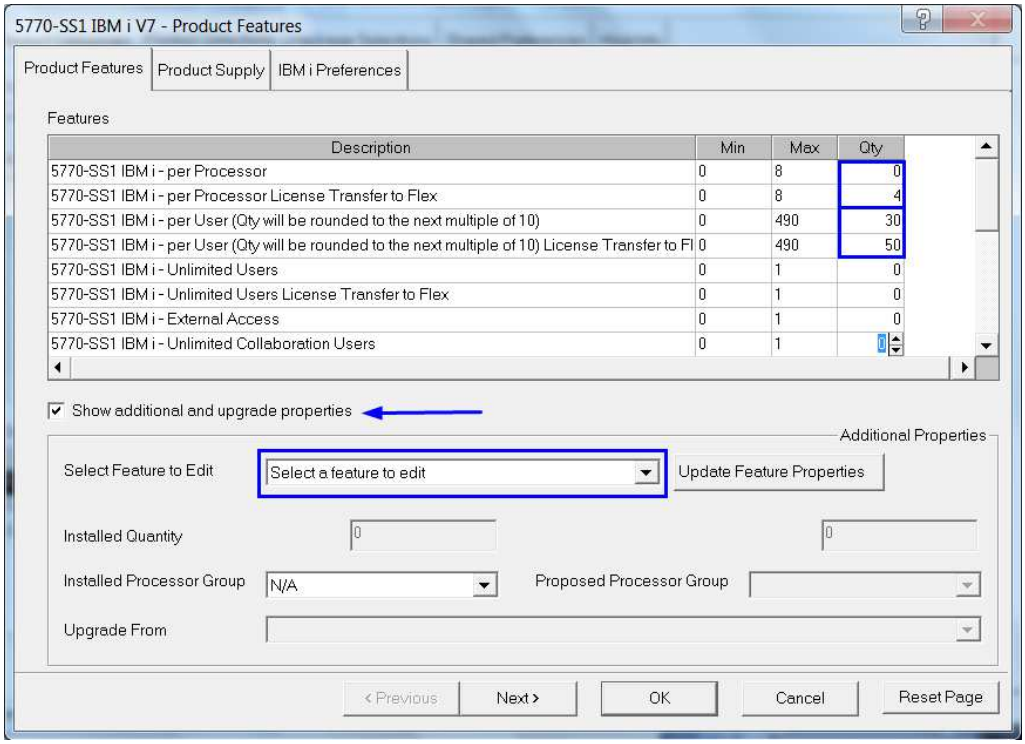


6. For this example we are leaving IBM i Software Maintenance at one year with 9x5 coverage, but if desired we could have selected the Maintenance Preferences tab and made changes. Click "OK" on the Keys Preferences tab and then again on the IBM i Preferences tab, then click "Configure." Validate the configuration. A portion of the configuration output for the Power compute node showing the software orders related to our example is shown below. The 40xx features on the 5733-NKY order represent the donor machine.

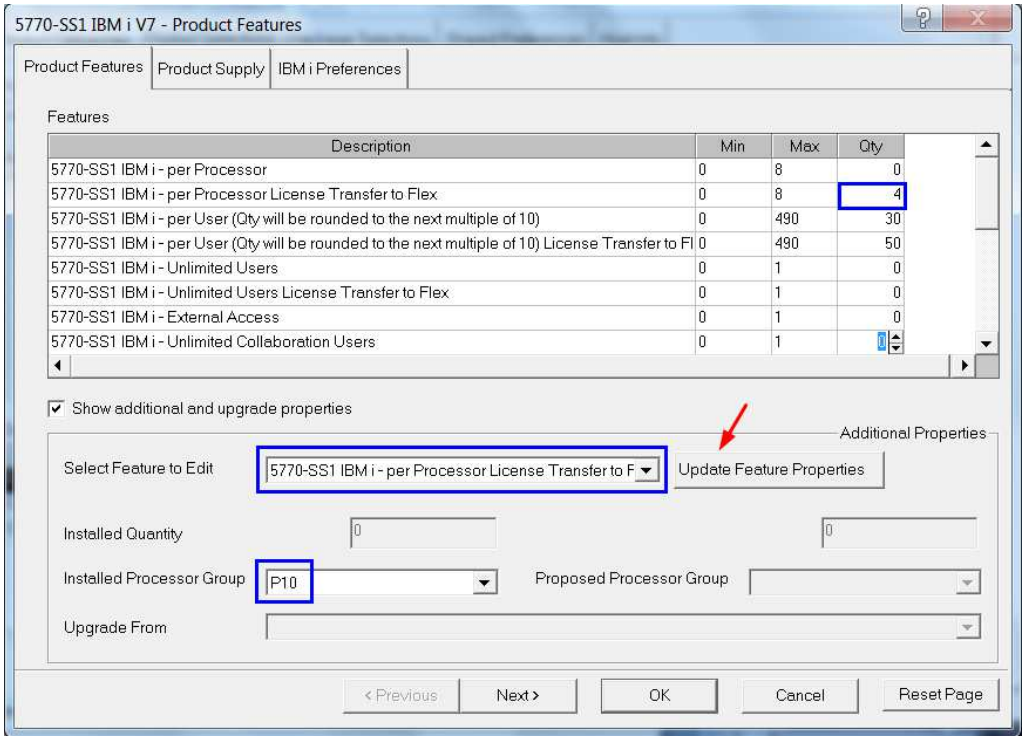
5733-NKY	Deactivate Software Key and ePoE	1	N/C
2539	IBM i - per Processor (57xx-SS1)	2	N/C
2924	English U/L SBCS Primary	1	N/C
4001	SW Key 1st MT Digit V5	8	N/C
4002	SW Key 2nd MT Digit V5	2	N/C
4003	SW Key 3rd MT Digit V5	10	N/C
4004	SW Key 4th MT Digit V5	2	N/C
4005	SW Key 1st CPU Digit V5	10	N/C
4006	SW Key 2nd CPU Digit V5	6	N/C
4007	SW Key 3rd CPU Digit V5	9	N/C
4008	SW Key 4th CPU Digit V5	9	N/C
4009	SW Key 5th CPU Digit V5	9	N/C
4010	SW Key 6th CPU Digit V5	9	N/C
4011	SW Key 7th CPU Digit V5	9	N/C
5809	5733-ITL Info Letter	1	N/C
6481	IBM i - per User block of 5 (57xx-SS1)	4	N/C
	Serial: 000000000	Total	USD 0.00
5733-SPP	IBM Software Maintenance for IBM i and Selected Products, 1-Year Registration	1	N/C
4910	P10 0Price Per Proc 1Yr Reg	2	N/C
9000	SWMA Renewal Registration	1	N/C
	Serial: 000000000	Total	USD 0.00
5770-SS1	IBM i V7	1	N/C
1581	OTC per IBM i license transfer (P05 to P10)	2	34,000.00
3441	LPAR System Indicator	1	N/C
3450	Electronic SW Delivery (ESD)	1	N/C
5817	Supply IBM i Lang Group 1 (i7.1)	1	N/C
5870	V7R1M0 Machine Code - RS 710-H(TR6)(05/31/2013)	1	N/C
6001	ePoE Registration	1	N/C
6489	IBM i per Proc Transfer to Flex Registration	2	N/C
6490	IBM i per User Transfer to Flex (blk of 10) Registration	2	N/C
7010	Setup and Operation CD i7.1	1	N/C
	Serial: 000000000	Total	USD 34,000.00

Initial Order example 2

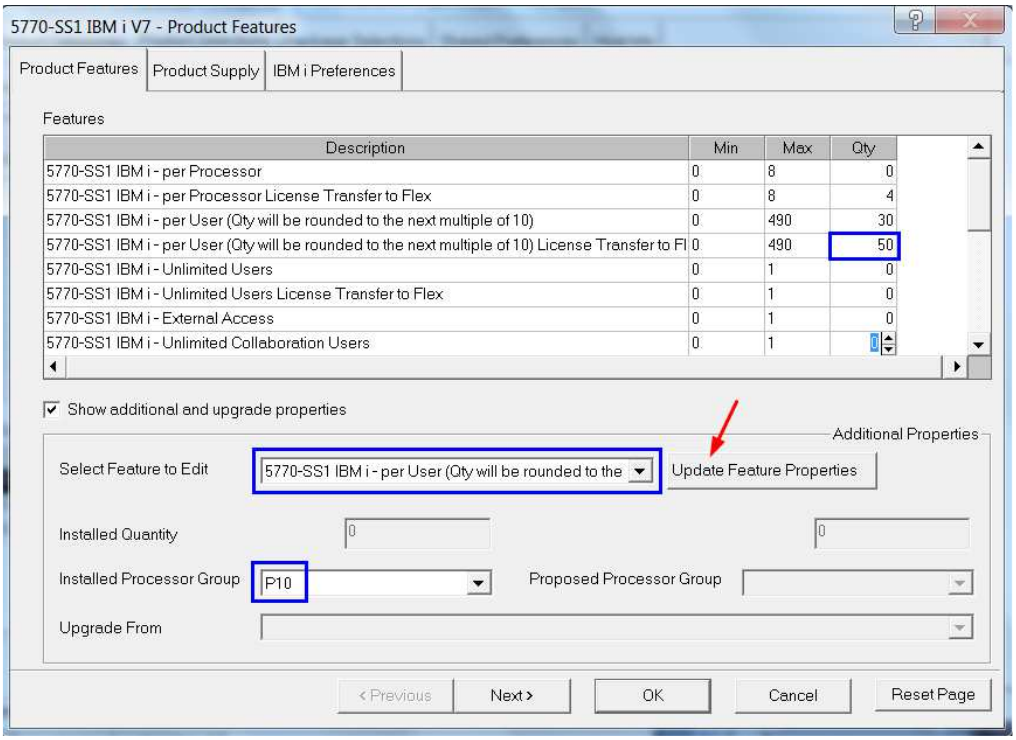
1. In this example we are transferring four IBM i processor entitlements and fifty users from an 8202-E4B to a new Power node, plus we are adding thirty new users and upgrading SWMA to 24x7 support. Begin by editing 5770-SS1 Product Features. Set the per Processor License Transfer and per User License Transfer quantities to four and fifty, respectively. Set the per User Qty to thirty and the per Processor Qty to zero. The next step is to check the "Show additional and upgrade properties" box, which populates the lower portion of the screen. We need to tell e-config the tier group of the software entitlements we are transferring. We are transferring both processor and user entitlements, so we will need to select each feature in turn.



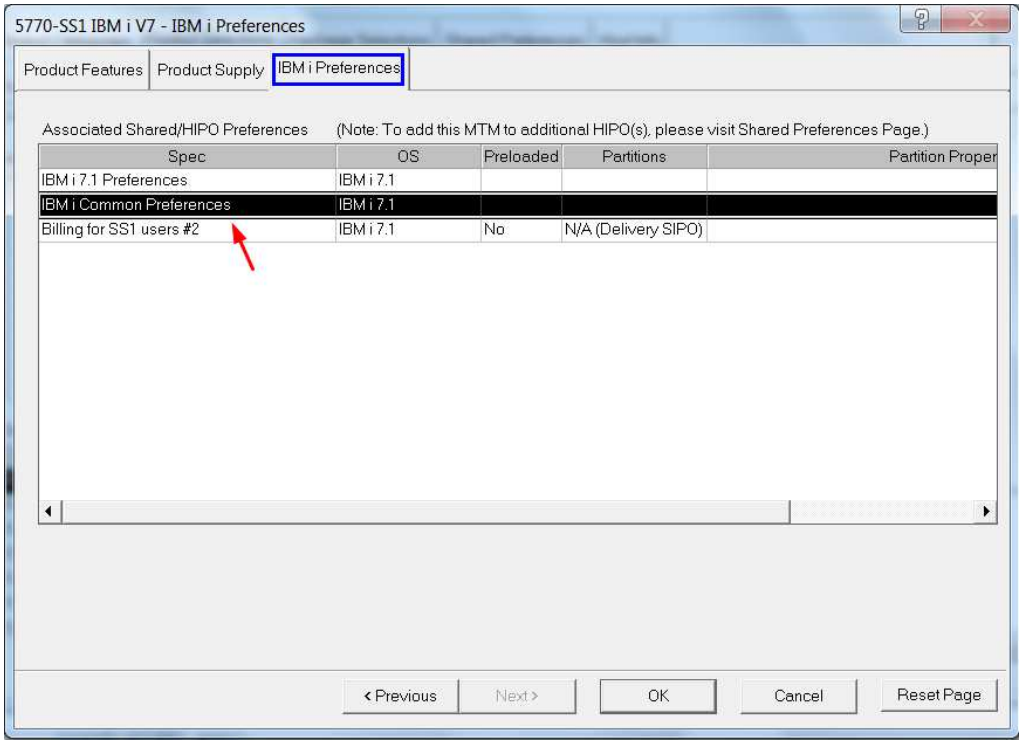
2. Select the IBM i per Processor License Transfer feature to edit and set the Installed Processor Group to P10. Note if you are transferring both processor and user entitlements, they must be the same group level. **Click the "Update Feature Properties" button to confirm.**



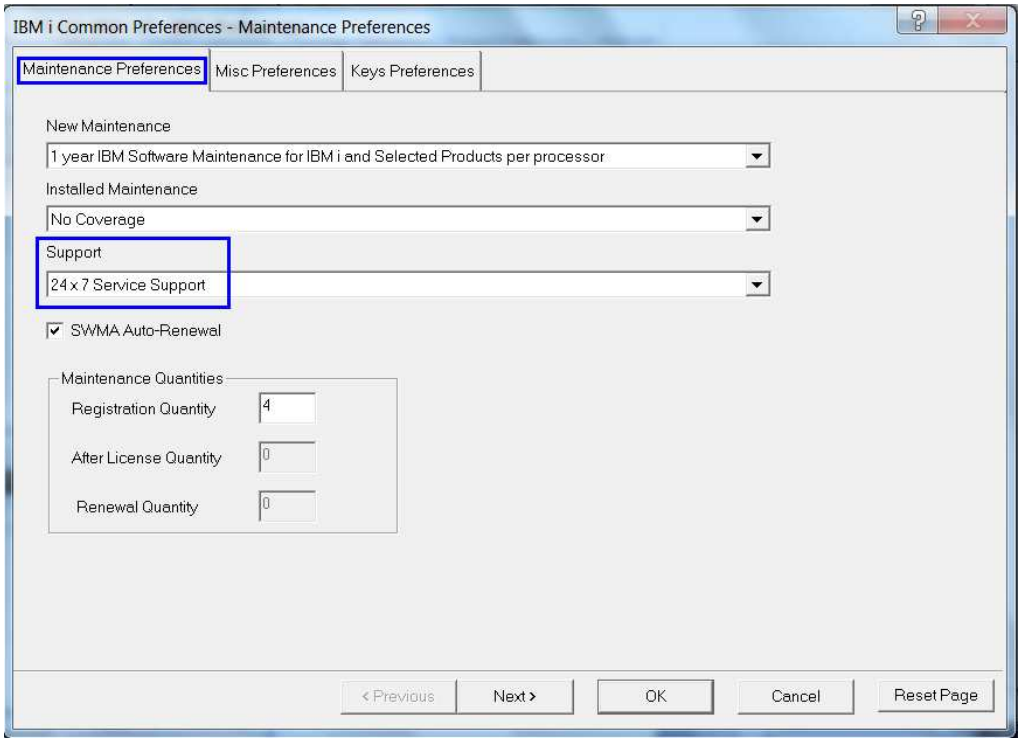
3. Next select the IBM i per User License Transfer feature to edit and set the Installed Processor Group to P10. Remember if you are transferring both processor and user entitlements, they must be the same group level. **Click the "Update Feature Properties" button to confirm**.



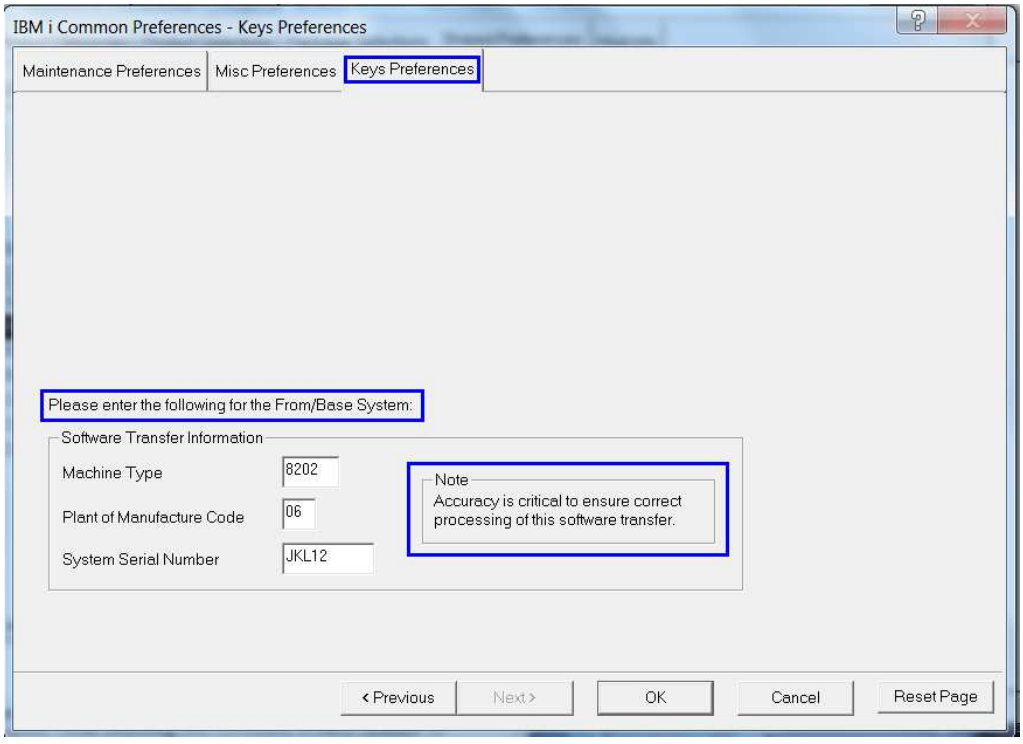
4. Next select the IBM i Preferences tab at the top of the screen and double click on IBM i Common Preferences.



5. Select the Maintenance Preferences tab and choose 24x7 support. Then select the Keys Preferences tab.



6. On the Keys Preferences tab, enter the Machine Type, Plant of Manufacture Code and System Serial Number of the donor system. Do not guess at the Plant of Manufacture Code (verify on the donor system if needed).

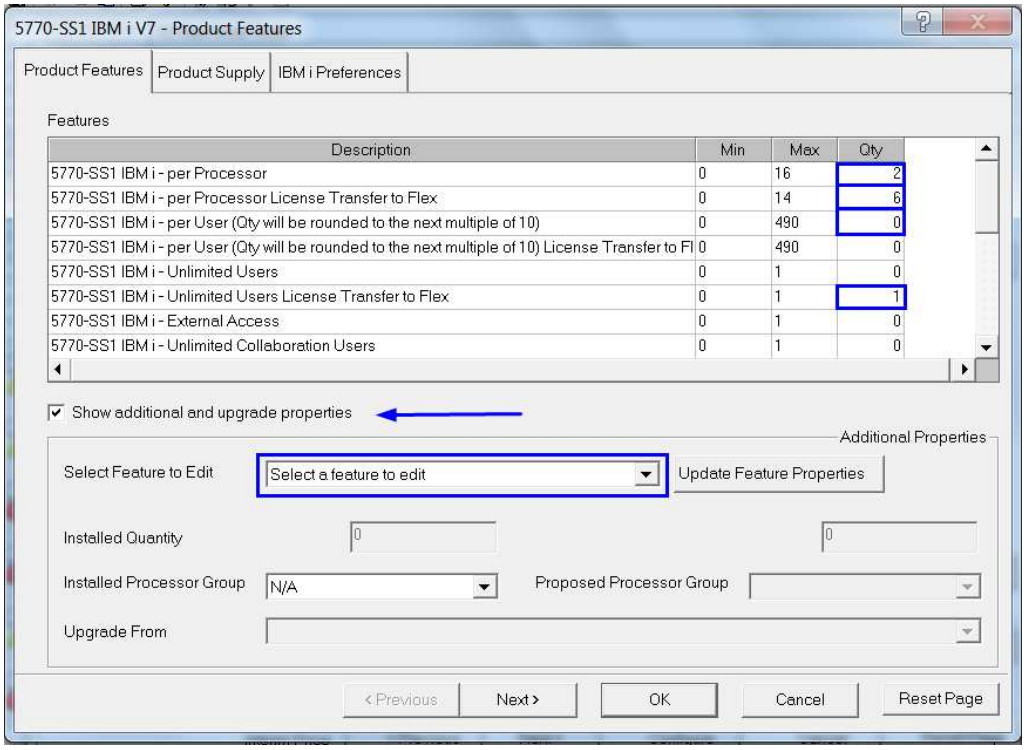


7. Click "OK" on the Keys Preferences tab and then again on the IBM i Preferences tab, then click "Configure." Validate the configuration. A portion of the configuration output for the Power compute node showing the software orders related to our example is shown below. The 40xx features on the 5733-NKY order represent the donor machine.

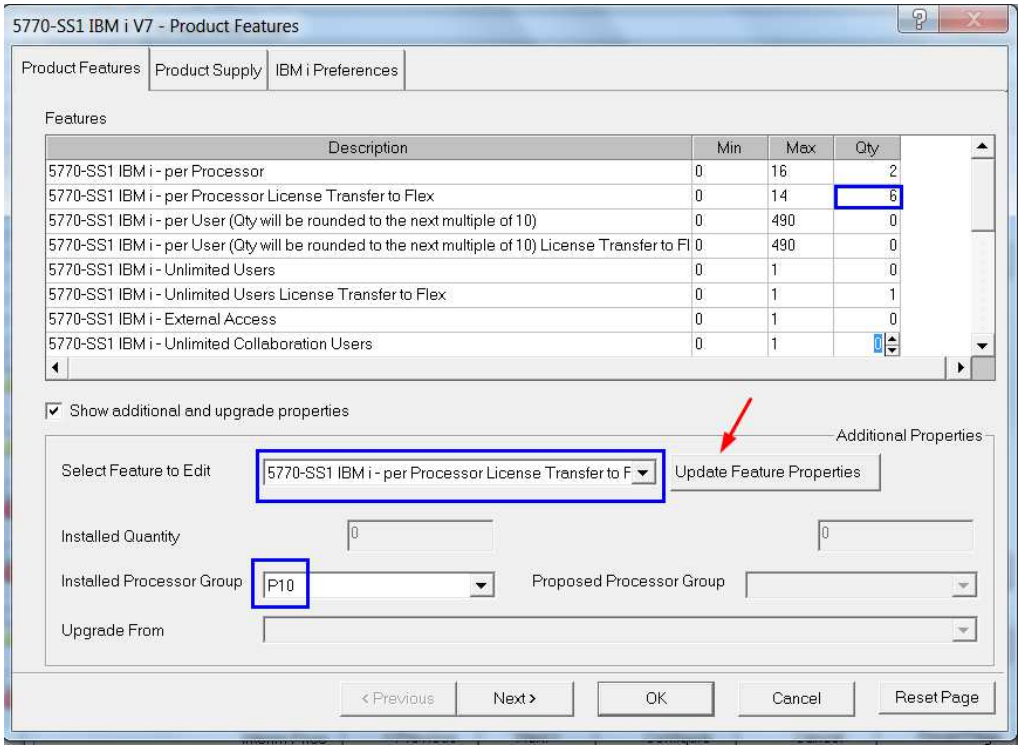
5733-NKY	Deactivate Software Key and ePoE	1	N/C
2539	IBM i - per Processor (57xx-SS1)	4	N/C
2924	English U/L SBCS Primary	1	N/C
4001	SW Key 1st MT Digit V5	8	N/C
4002	SW Key 2nd MT Digit V5	2	N/C
4003	SW Key 3rd MT Digit V5	10	N/C
4004	SW Key 4th MT Digit V5	2	N/C
4005	SW Key 1st CPU Digit V5	10	N/C
4006	SW Key 2nd CPU Digit V5	6	N/C
4007	SW Key 3rd CPU Digit V5	9	N/C
4008	SW Key 4th CPU Digit V5	9	N/C
4009	SW Key 5th CPU Digit V5	9	N/C
4010	SW Key 6th CPU Digit V5	9	N/C
4011	SW Key 7th CPU Digit V5	9	N/C
5809	5733-ITL Info Letter	1	N/C
6481	IBM i - per User block of 5 (57xx-SS1)	10	N/C
	Serial: 000000000	Total	USD 0.00
5733-SPP	IBM Software Maintenance for IBM i and Selected Products, 1-Year Registration	1	N/C
4910	P10 0Price Per Proc 1Yr Reg	4	N/C
4912	P10 Registration/Renewal 24x7	4	1,372.00
9000	SWMA Renewal Registration	1	N/C
	Serial: 000000000	Total	USD 1,372.00
5770-SS1	IBM i V7	1	N/C
1448	OTC per IBM i license transfer	4	20,000.00
3441	LPAR System Indicator	1	N/C
3450	Electronic SW Delivery (ESD)	1	N/C
5817	Supply IBM i Lang Group 1 (i7.1)	1	N/C
5870	V7R1M0 Machine Code - RS 710-H(TR6)(05/31/2013)	1	N/C
6001	ePoE Registration	1	N/C
6100	IBM i per 5 Users Registration	6	N/C
6489	IBM i per Proc Transfer to Flex Registration	4	N/C
6490	IBM i per User Transfer to Flex (blk of 10) Registration	5	N/C
7010	Setup and Operation CD i7.1	1	N/C
	Serial: 000000000	Total	USD 20,000.00
5770-SSC	IBM i per User Billing	1	N/C
1444	OTC per 10 Users (2xX/42X/71Y/73X/74X)	3	7,500.00
	Serial: 000000000	Total	USD 7,500.00

Initial Order example 3

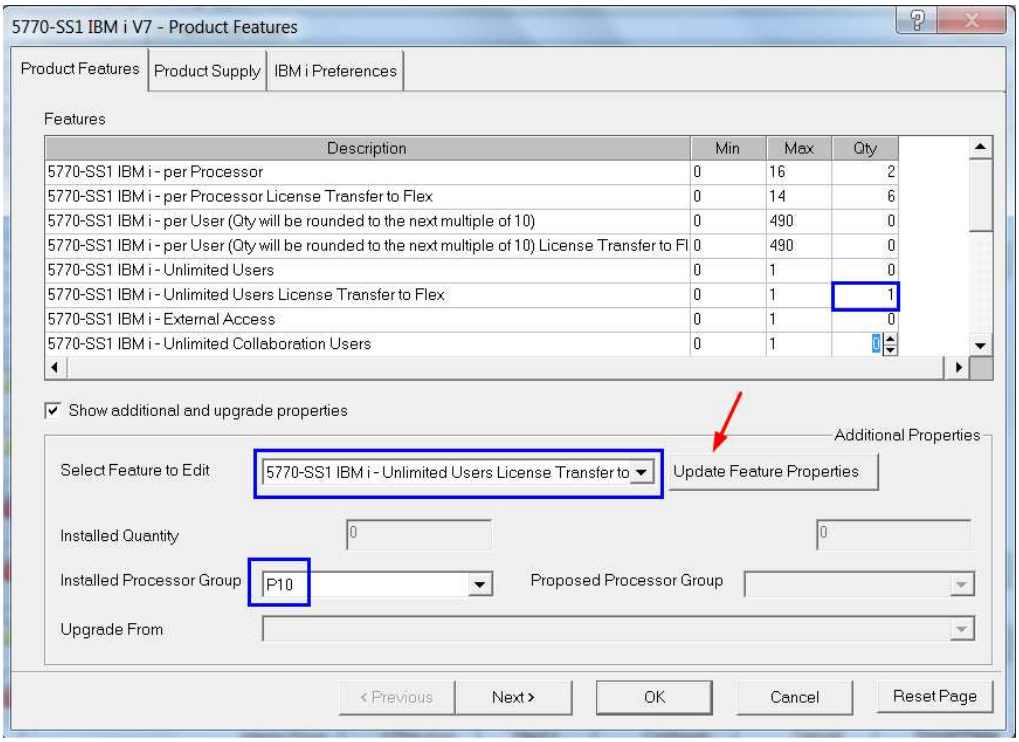
1. In this example we are transferring six IBM i processor entitlements and Unlimited users from an 8202-E4D to a new Power node, adding two new processor entitlements and upgrading SWMA to three years with 24x7 support. Begin by editing 5770-SS1 Product Features. Set the per Processor License Transfer Qty to six and the per Processor Qty to two. Once you set the Unlimited Users License Transfer Qty entitlement to one, you can reset the new per User Qty to zero. The next step is to check the "Show additional and upgrade properties" box, which populates the lower portion of the screen. We need to tell e-config the tier group of the software entitlements we are transferring. We are transferring both processor and Unlimited user entitlements, so we will need to select each feature in turn.



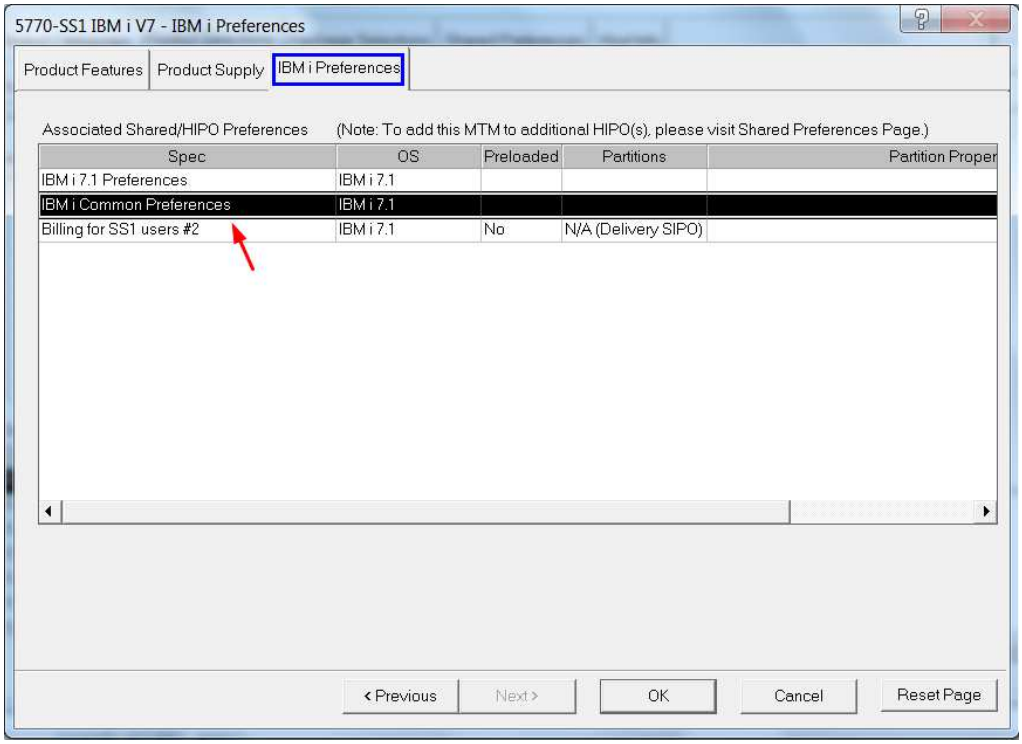
2. Select the IBM i per Processor License Transfer feature to edit and set the Installed Processor Group to P10. Note if you are transferring both processor and user entitlements, they must be the same group level. **Click the "Update Feature Properties" button to confirm.**



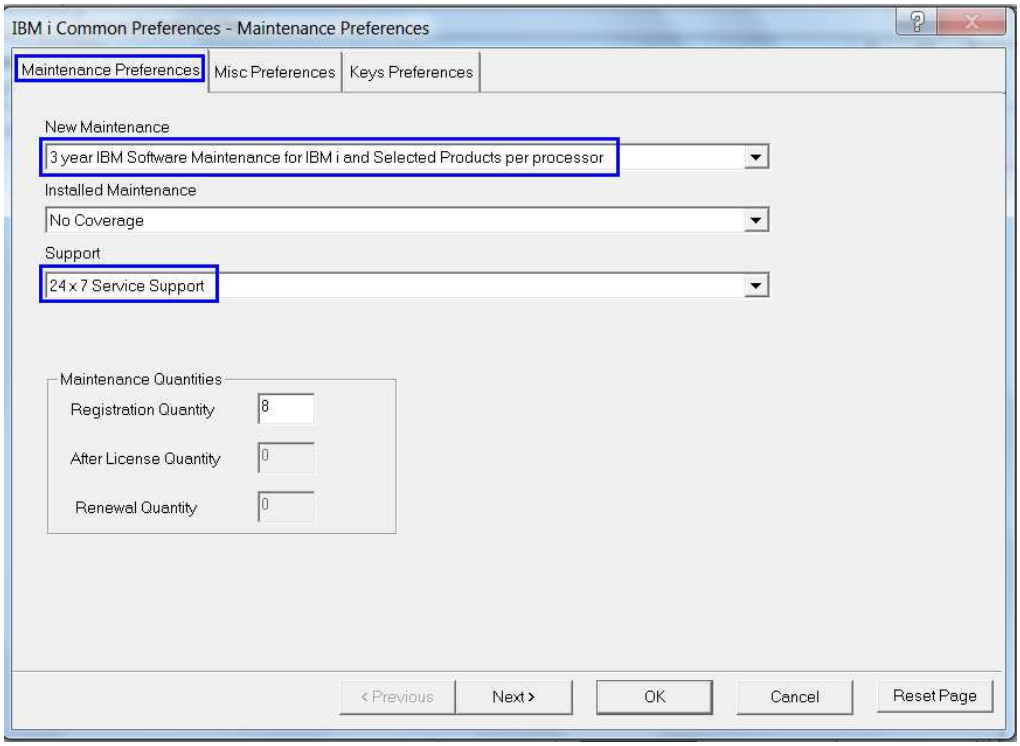
3. Next select the IBM i Unlimited Users License Transfer feature to edit and set the Installed Processor Group to P10. Remember if you are transferring both processor and user entitlements, they must be the same group level. **Click the "Update Feature Properties" button to confirm**.



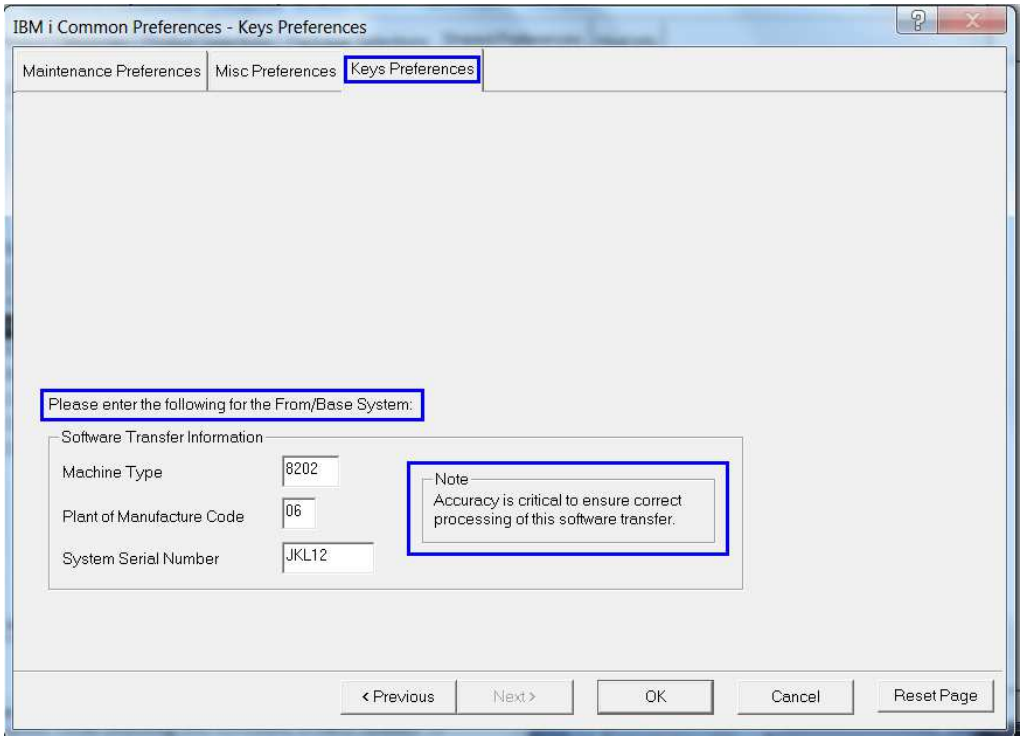
4. Next select the IBM i Preferences tab at the top of the screen and double click on IBM i Common Preferences.



5. Select the Maintenance Preferences tab and choose three year SWMA with 24x7 support. Then select the Keys Preferences tab.



6. On the Keys Preferences tab, enter the Machine Type, Plant of Manufacture Code and System Serial Number of the donor system. Do not guess at the Plant of Manufacture Code (verify on the donor system if needed).

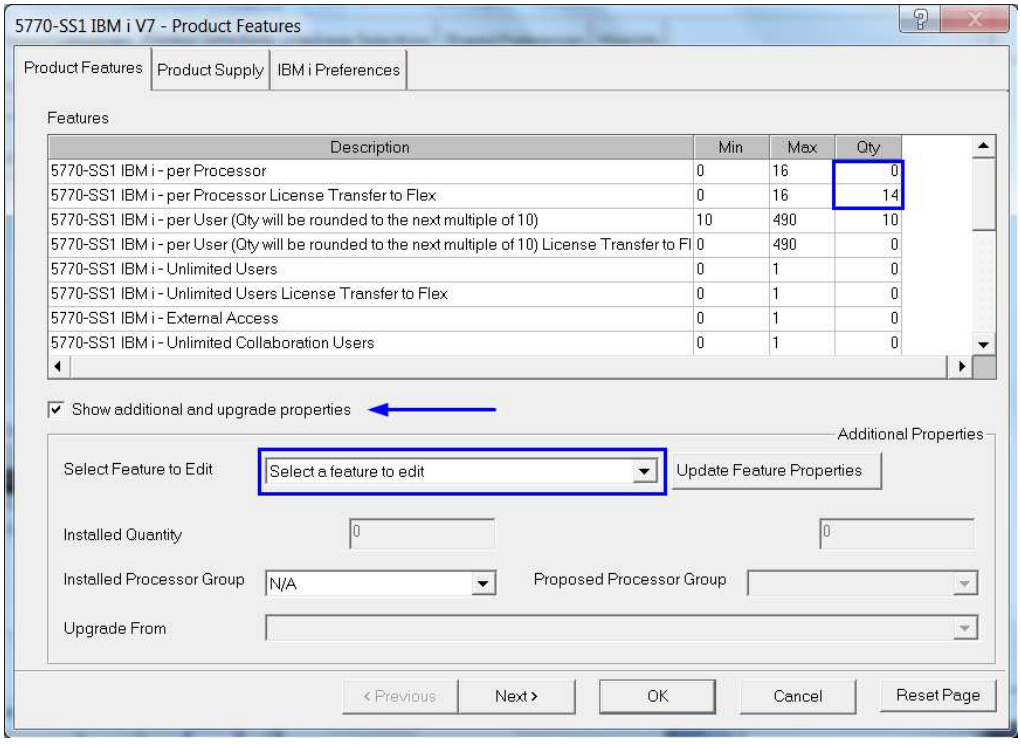


7. Click "OK" on the Keys Preferences tab and then again on the IBM i Preferences tab, then click "Configure." Validate the configuration. A portion of the configuration output for the Power compute node showing the software orders related to our example is shown below. The 40xx features on the 5733-NKY order represent the donor machine.

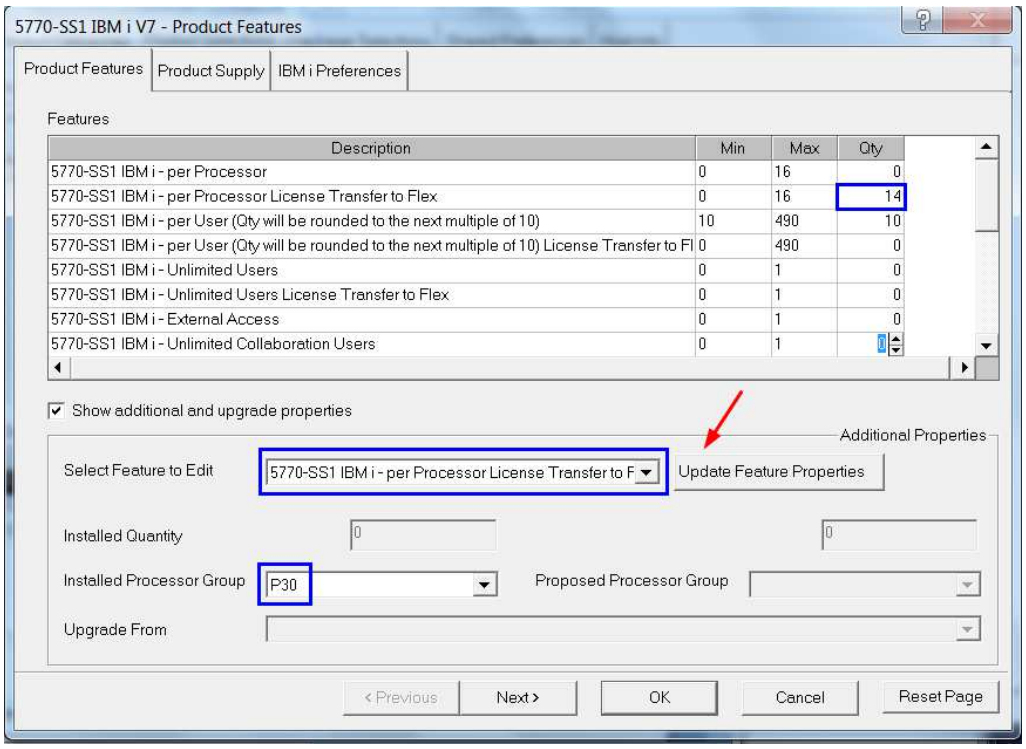
5733-NKY	Deactivate Software Key and ePoE	1	N/C
2539	IBM i - per Processor (57xx-SS1)	6	N/C
2924	English U/L SBCS Primary	1	N/C
4001	SW Key 1st MT Digit V5	8	N/C
4002	SW Key 2nd MT Digit V5	2	N/C
4003	SW Key 3rd MT Digit V5	10	N/C
4004	SW Key 4th MT Digit V5	2	N/C
4005	SW Key 1st CPU Digit V5	10	N/C
4006	SW Key 2nd CPU Digit V5	6	N/C
4007	SW Key 3rd CPU Digit V5	9	N/C
4008	SW Key 4th CPU Digit V5	9	N/C
4009	SW Key 5th CPU Digit V5	9	N/C
4010	SW Key 6th CPU Digit V5	9	N/C
4011	SW Key 7th CPU Digit V5	9	N/C
5809	5733-ITL Info Letter	1	N/C
6482	IBM i - Unlimited User (57xx-SS1)	1	N/C
	Serial: 000000000	Total	USD 0.00
5733-SP3	IBM Software Maintenance for IBM i and Selected Products, 3-Year Registration	1	N/C
0004	P10 0Price Per Proc 3Yr Reg	8	N/C
0006	P10 Registration/Renewal 24x7	8	7,408.00
	Serial: 000000000	Total	USD 7,408.00
5733-SPE	IBM Software Maintenance for IBM i and Selected Products, 3-Year Extended Registration	1	N/C
4943	P10 Per Processor 3Yr Reg	8	47,600.00
	Serial: 000000000	Total	USD 47,600.00
5770-SS1	IBM i V7	1	N/C
1448	OTC per IBM i license transfer	6	30,000.00
1490	IBM i per Core (2xX/42X/71Y/73X/74X)	2	N/C
3441	LPAR System Indicator	1	N/C
3450	Electronic SW Delivery (ESD)	1	N/C
5817	Supply IBM i Lang Group 1 (i7.1)	1	N/C
5870	V7R1M0 Machine Code - RS 710-H(TR6)(05/31/2013)	1	N/C
6000	IBM i per Core Registration	2	N/C
6001	ePoE Registration	1	N/C
6489	IBM i per Proc Transfer to Flex Registration	6	N/C
6491	IBM i Unlimited User Transfer to Flex Registration	1	N/C
7010	Setup and Operation CD i7.1	1	N/C
	Serial: 000000000	Total	USD 30,000.00
5770-SSA	IBM i per Processor License Billing	1	N/C
1033	OTC per Core w/ 1-Year SWMA (2xX/42X/71Y/73X/74X)	2	29,990.00
	Serial: 000000000	Total	USD 29,990.00

Initial Order example 4

1. In this example we are transferring fourteen IBM i processor entitlements from a 9117-MMC donor machine (transfer group 2) to a new Power node. When processor entitlements from donor machines in transfer groups 1, 2 or 3, which correspond to software tiers P20 and above, are transferred to PureFlex or Flex Power compute nodes **with a software tier of P10**, the target PureFlex or Flex Power compute node will automatically receive an entitlement for Unlimited users. The Unlimited user entitlement is implemented as a "transfer" on the 5770-SS1 Product Features screen. Begin by editing 5770-SS1 Product Features. Set the per Processor License Transfer Qty to fourteen, then reset the per Processor Qty to zero. Leave the default quantity of ten new users for now. The next step is to check the "Show additional and upgrade properties" box, which populates the lower portion of the screen. We need to tell e-config the tier group of the software entitlements we are transferring.

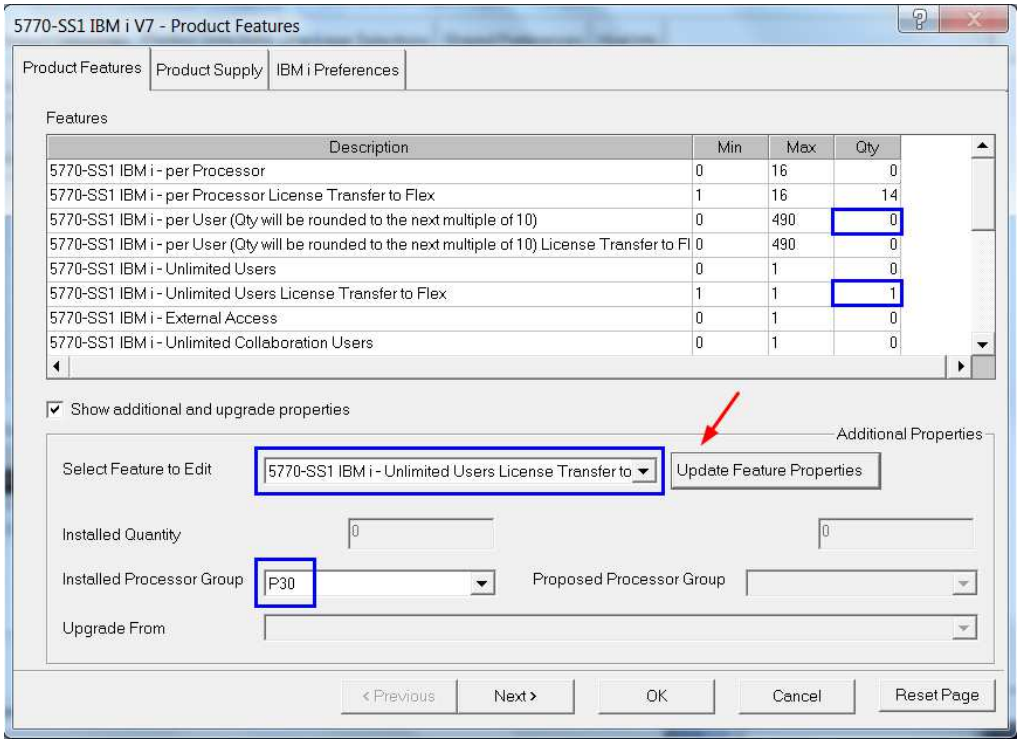


2. Select the IBM i per Processor License Transfer feature to edit and set the Installed Processor Group to P30. **Click the "Update Feature Properties" button.**

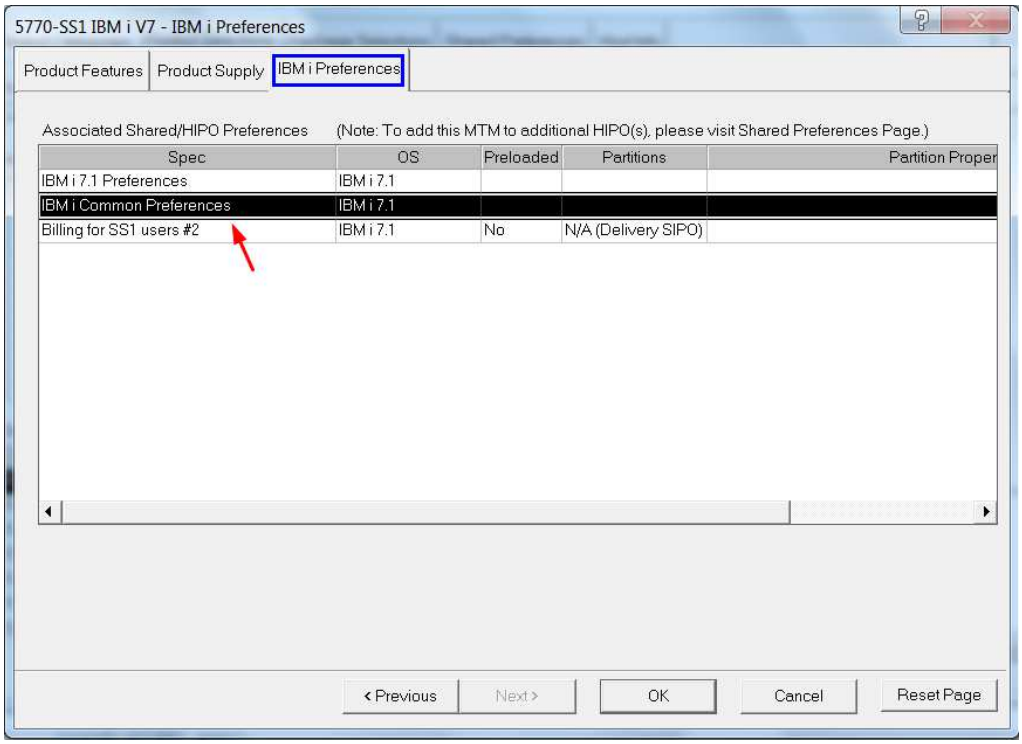


3. As soon as you confirm that the processor entitlements to be transferred are P30, e-config will automatically change the Unlimited Users Transfer Qty to one. Once it does that you can reset the new per User quantity to zero. Even though there isn't really an installed Unlimited user feature on the donor machine, you still need to select the IBM i Unlimited User License Transfer feature to edit and set

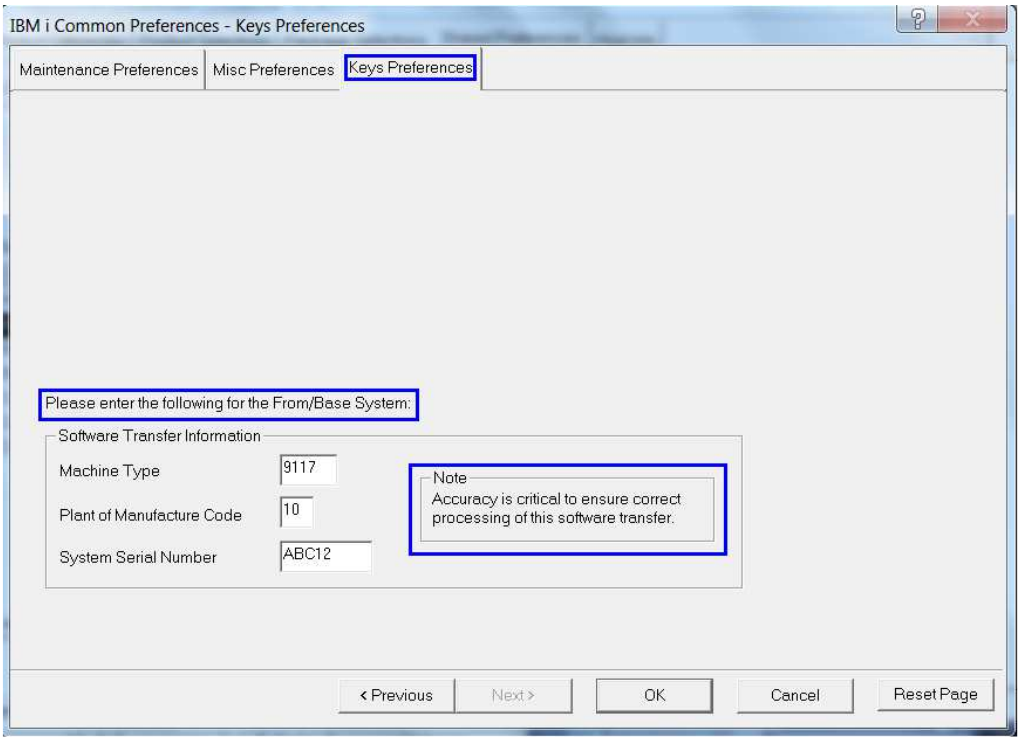
the Installed Processor Group to P30 to match the processor entitlements we are transferring. **Click the "Update Feature Properties" button to confirm**.



4. Next select the IBM i Preferences tab at the top of the screen and double click on IBM i Common Preferences.



5. Select the Keys Preferences tab and enter the Machine Type, Plant of Manufacture Code and System Serial Number of the donor system. Do not guess at the Plant of Manufacture Code (verify on the donor system if needed).



6. For this example we are leaving IBM i Software Maintenance at one year with 9x5 coverage, but if desired we could have selected the Maintenance Preferences tab and made changes. Click "OK" on the Keys Preferences tab and then again on the IBM i Preferences tab, then click "Configure." Validate the configuration. A portion of the configuration output for the Power compute node showing the software orders related to our example is shown below. The 40xx features on the 5733-NKY order represent the donor machine.

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5733-NKY	Deactivate Software Key and ePoE	1	N/C
2539	IBM i - per Processor (57xx-SS1)	14	N/C
2924	English U/L SBCS Primary	1	N/C
4001	SW Key 1st MT Digit V5	9	N/C
4002	SW Key 2nd MT Digit V5	1	N/C
4003	SW Key 3rd MT Digit V5	1	N/C
4004	SW Key 4th MT Digit V5	7	N/C
4005	SW Key 1st CPU Digit V5	1	N/C
4006	SW Key 2nd CPU Digit V5	10	N/C
4007	SW Key 3rd CPU Digit V5	9	N/C
4008	SW Key 4th CPU Digit V5	9	N/C
4009	SW Key 5th CPU Digit V5	9	N/C
4010	SW Key 6th CPU Digit V5	9	N/C
4011	SW Key 7th CPU Digit V5	9	N/C
5809	5733-ITL Info Letter	1	N/C
	Serial: 000000000	Total	USD 0.00
5733-SPP	IBM Software Maintenance for IBM i and Selected Products, 1-Year Registration	1	N/C
4910	P10 0Price Per Proc 1Yr Reg	14	N/C
9000	SWMA Renewal Registration	1	N/C
	Serial: 000000000	Total	USD 0.00
5770-SS1	IBM i V7	1	N/C
1448	OTC per IBM i license transfer	14	70,000.00
3450	Electronic SW Delivery (ESD)	1	N/C
5817	Supply IBM i Lang Group 1 (i7.1)	1	N/C
5870	V7R1M0 Machine Code - RS 710-H(TR6)(05/31/2013)	1	N/C
6001	ePoE Registration	1	N/C
6489	IBM i per Proc Transfer to Flex Registration	14	N/C
6492	IBM i Unlimited User Transfer to Flex Registration	1	N/C
7010	Setup and Operation CD i7.1	1	N/C
	Serial: 000000000	Total	USD 70,000.00

Configuration steps to include IBM i license transfer in a new PurePower System configuration

IBM i support for the S822 was announced with some special terms and conditions. One of these is that VIOS is required. If you have configured a stand-alone S822 server, you will have noticed that IBM i cannot be selected as the Primary OS on the Products tab in e-config; instead you select VIO or another operating system as the Primary OS, and IBM i 7.x as an Additional OS. Configuration of an S822 as a node of a PurePower System works differently -- the required VIOS is assumed to be part of the solution, so you can select IBM i as the Primary OS on the Products tab.

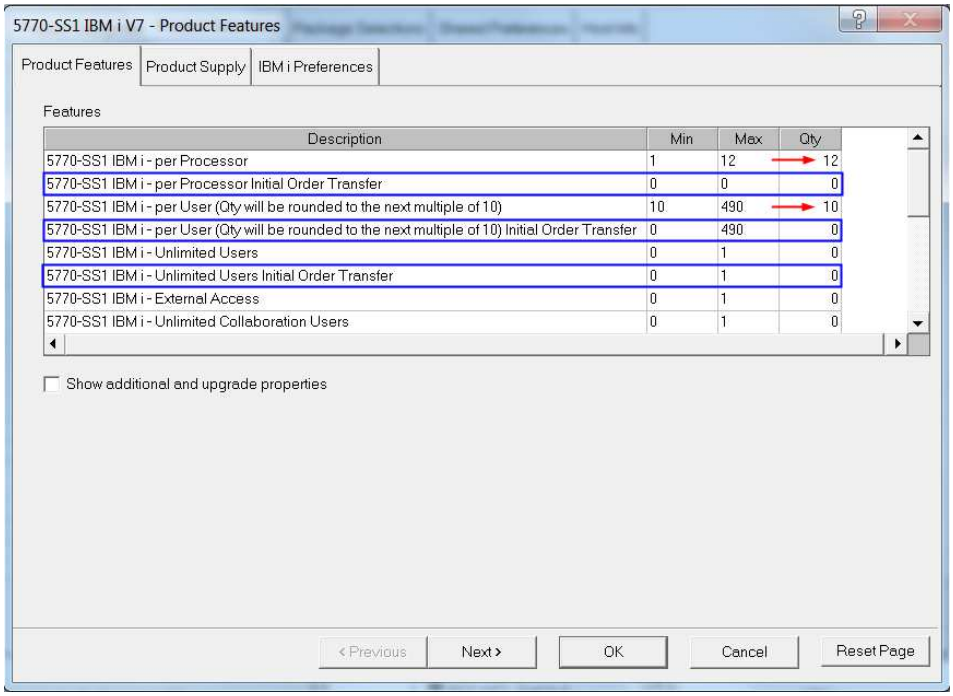
Also note there is a maximum of two cores per IBM i partition allowed on an S822, although you can have multiple IBM i partitions. E-config will let you specify more than two IBM i processor entitlements (either new or transferred or in combination) on an S822; it is the client's responsibility to adhere to the two core maximum per IBM i partition limit.

The following examples show how to include IBM i license transfer during an initial order configuration of a new PurePower System S822 compute node. It is assumed you have already configured the hardware for the S822 node that will run IBM i. All sample output shows U.S.A. feature codes and prices. The examples are:

- **Example 5. Transfer two IBM i processor entitlements and seventy users from a group 5 donor, upgrade SWMA to 24x7 support**

- **Example 6. Transfer two IBM i processor entitlements and fifty users from a group 4 donor, add four new IBM i processor entitlements and 120 new users, upgrade SWMA to three years with 24x7 support**

The starting point for all examples is the Software Products wizard for the applicable S822 node. Begin by editing product 5770-SS1. The screen capture below shows the options for specifying the transfer of processor, user and Unlimited user entitlements to an S822 node. E-config defaults to requiring new processor entitlements for all processors and ten new users on a new S822. Once you specify that processors and/or users are to be transferred, e-config will allow you to reset the new processor and/or new user fields to zero, or you can add new processors and/or users at the same time.



Initial Order example 5

1. In this example we are transferring two IBM i processor entitlements and seventy users from an 8202-E4B (transfer group 5) donor machine to a new S822 node but not adding any new processors or users -- all the IBM i entitlements will be transferred entitlements. Begin by editing 5770-SS1 Product Features. Set the per Processor Initial Order Transfer and per User Initial Order Transfer quantities to two and seventy, respectively, and reset the per Processor and per User quantities to zero. The next step is to check the "Show additional and upgrade properties" box, which populates the lower portion of the screen. We need to tell e-config the tier group of the software entitlements we are transferring. We are transferring both processor and user entitlements, so we will need to select each feature in turn.

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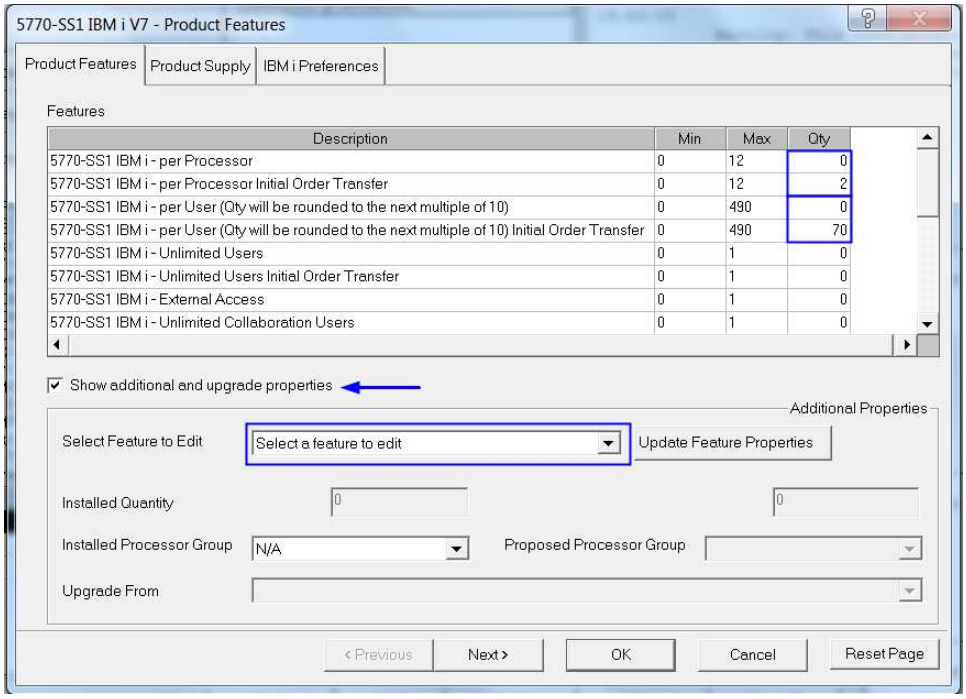
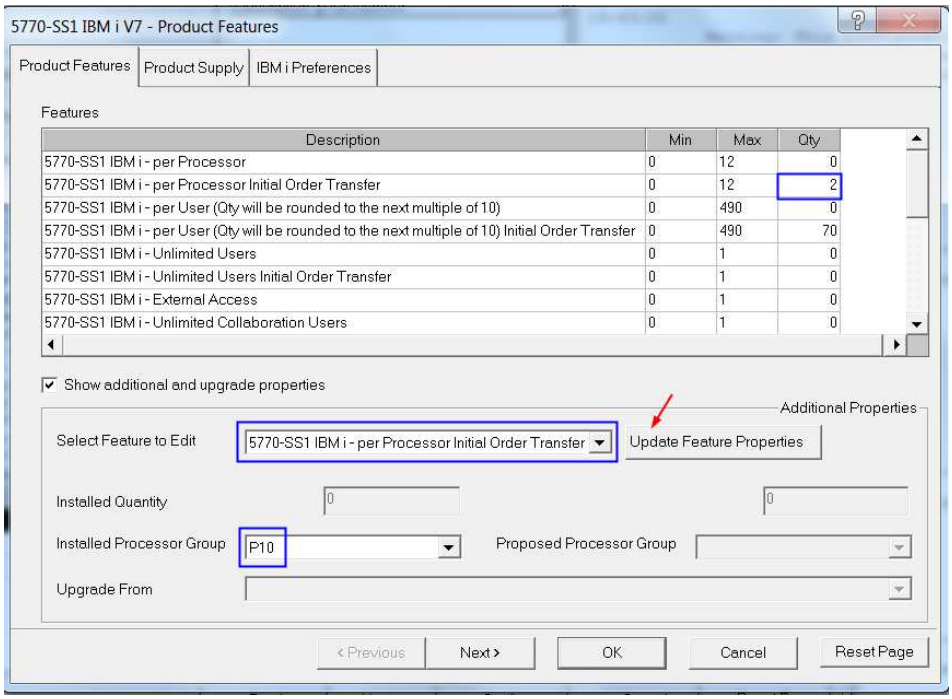
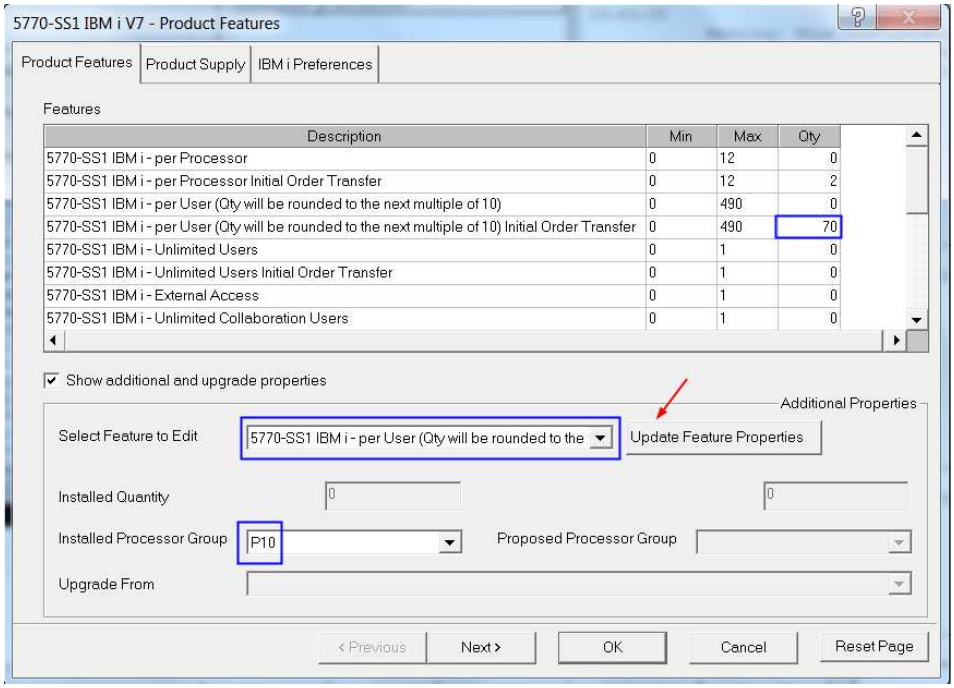


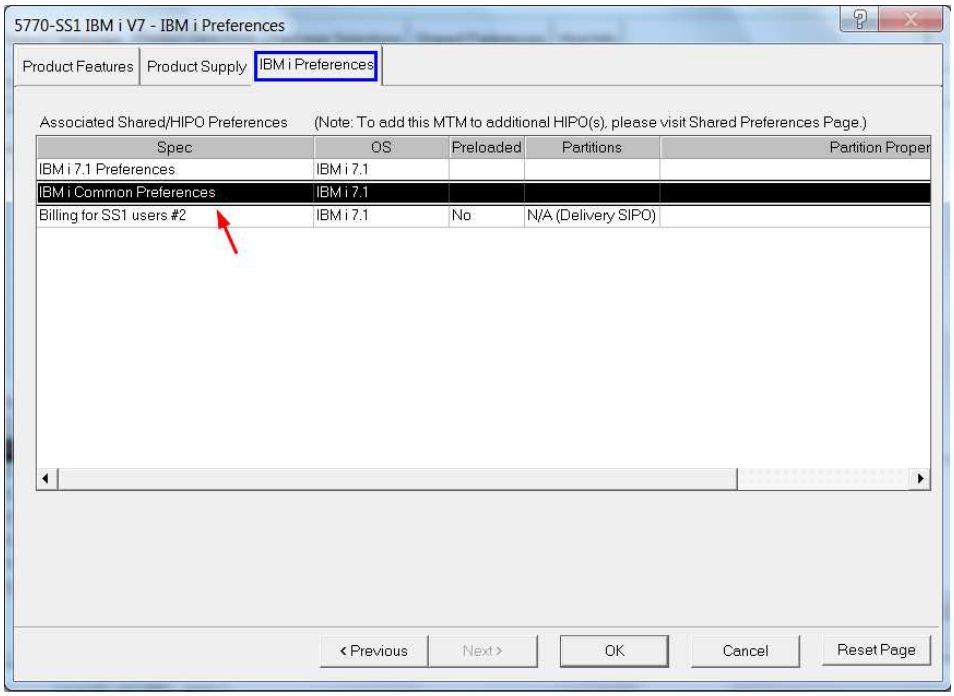
2. Select the IBM i per Processor Initial Order Transfer feature to edit and set the Installed Processor Group to P10. Note if you are transferring both processor and user entitlements, they must be the same group level. **Click the "Update Feature Properties" button to confirm**.



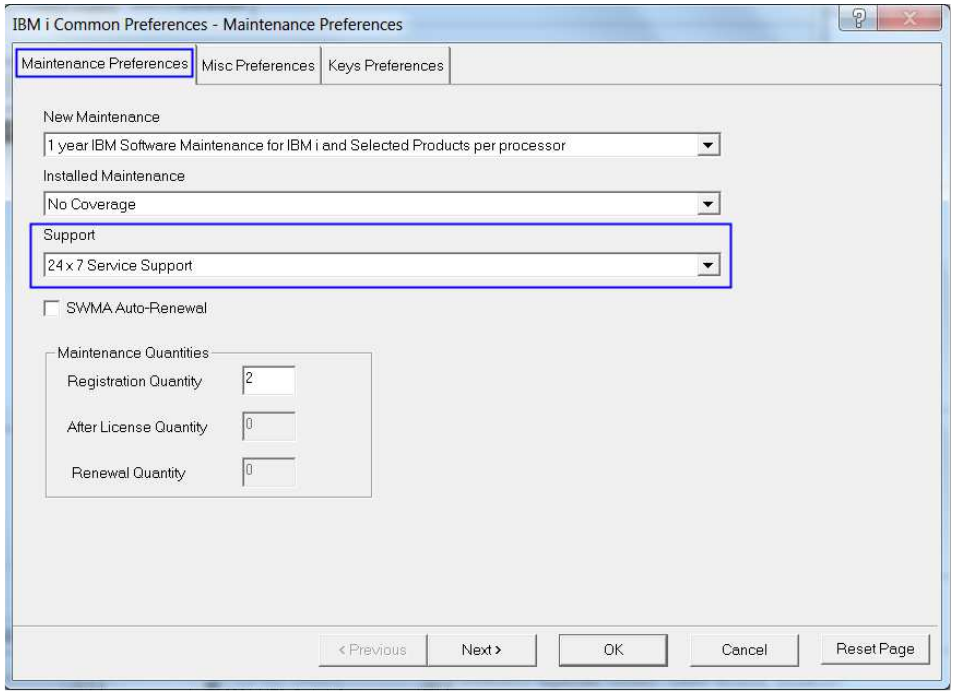
3. Next select the IBM i per User Initial Order Transfer feature to edit and set the Installed Processor Group to P10. Remember if you are transferring both processor and user entitlements, they must be the same group level. **Click the Update Feature Properties button to confirm**.



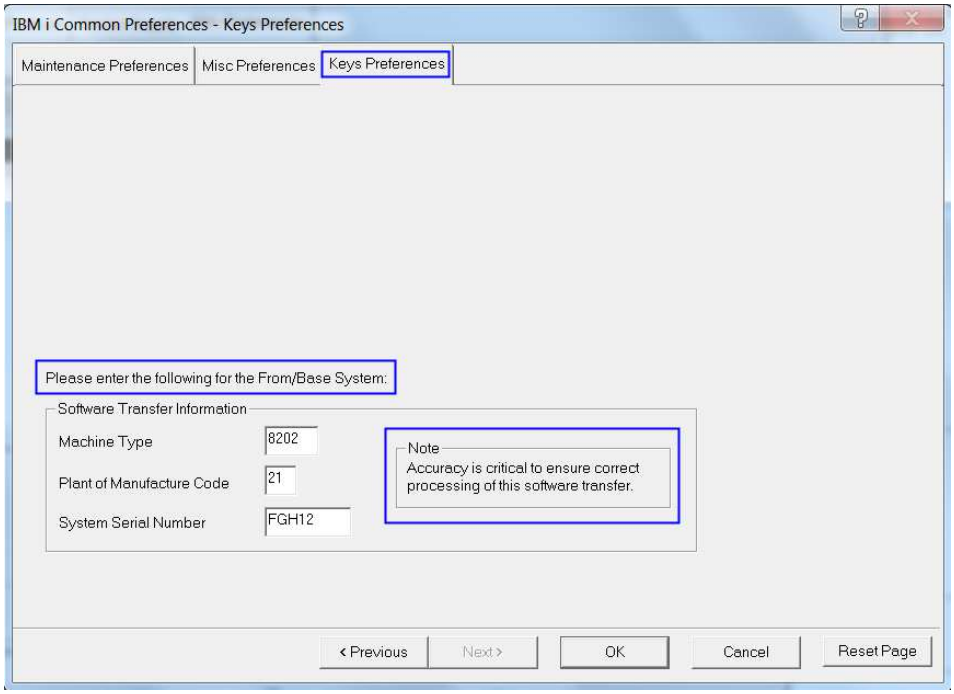
4. Next select the IBM i Preferences tab at the top of the screen and double click on IBM i Common Preferences.



5. Select the Maintenance Preferences tab and choose 24x7 support. Then select the Keys Preferences tab.



6. On the Keys Preferences tab, enter the Machine Type, Plant of Manufacture Code and System Serial Number of the donor system. Do not guess at the Plant of Manufacture Code (verify on the donor system if needed).

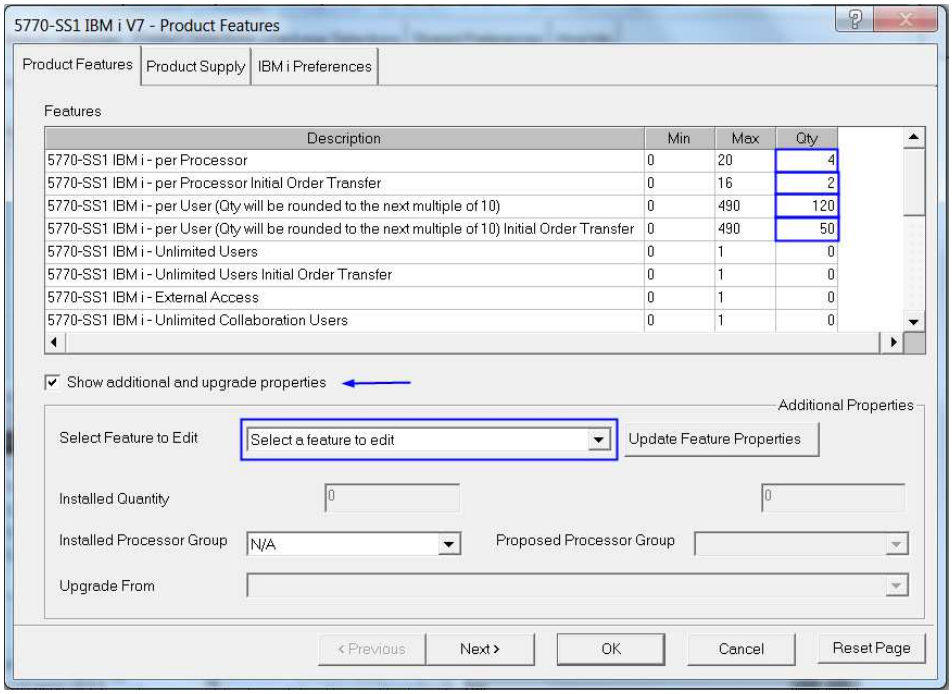


7. Click "OK" on the Keys Preferences tab and then again on the IBM i Preferences tab, then click "Configure." Validate the configuration. A portion of the configuration output for the PurePower System S822 compute node showing the software orders related to our example is shown below. The 40xx features on the 5733-NKY order represent the donor machine.

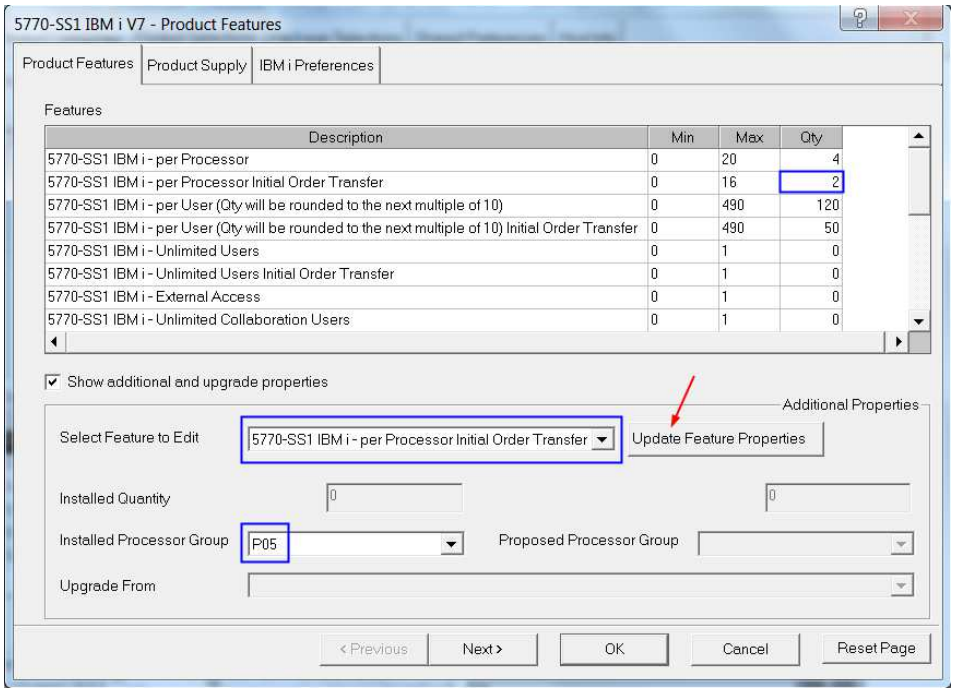
5733-NKY	Deactivate Software Key and ePoE	1	N/C
2539	IBM i - per Processor (57xx-SS1)	2	N/C
2924	English U/L SBCS Primary	1	N/C
4001	SW Key 1st MT Digit V5	8	N/C
4002	SW Key 2nd MT Digit V5	2	N/C
4003	SW Key 3rd MT Digit V5	10	N/C
4004	SW Key 4th MT Digit V5	2	N/C
4005	SW Key 1st CPU Digit V5	2	N/C
4006	SW Key 2nd CPU Digit V5	1	N/C
4007	SW Key 3rd CPU Digit V5	16	N/C
4008	SW Key 4th CPU Digit V5	17	N/C
4009	SW Key 5th CPU Digit V5	18	N/C
4010	SW Key 6th CPU Digit V5	1	N/C
4011	SW Key 7th CPU Digit V5	2	N/C
5809	5733-ITL Info Letter	1	N/C
6481	IBM i - per User block of 5 (57xx-SS1)	14	N/C
	Serial: 000000000	Total	USD 0.00
5733-SPP	IBM Software Maintenance for IBM i and Selected Products, 1-Year Registration	1	N/C
4910	P10 0Price Per Proc 1Yr Reg	2	N/C
4912	P10 Registration/Renewal 24x7	2	686.00
	Serial: 000000000	Total	USD 686.00
5770-SS1	IBM i V7	1	N/C
1448	OTC per IBM i license transfer	2	10,000.00
3441	LPAR System Indicator	1	N/C
3450	Electronic SW Delivery (ESD)	1	N/C
5872	V7R2M0 Machine Code - RS 720-F(TR3)(20 Nov 2015)	1	N/C
6001	ePoE Registration	1	N/C
6489	IBM i per Proc Init Order Transfer Registration	2	N/C
6490	IBM i per User Init Order Transfer (blk of 10) Registration	7	N/C
	Serial: 000000000	Total	USD 10,000.00

Initial Order example 6

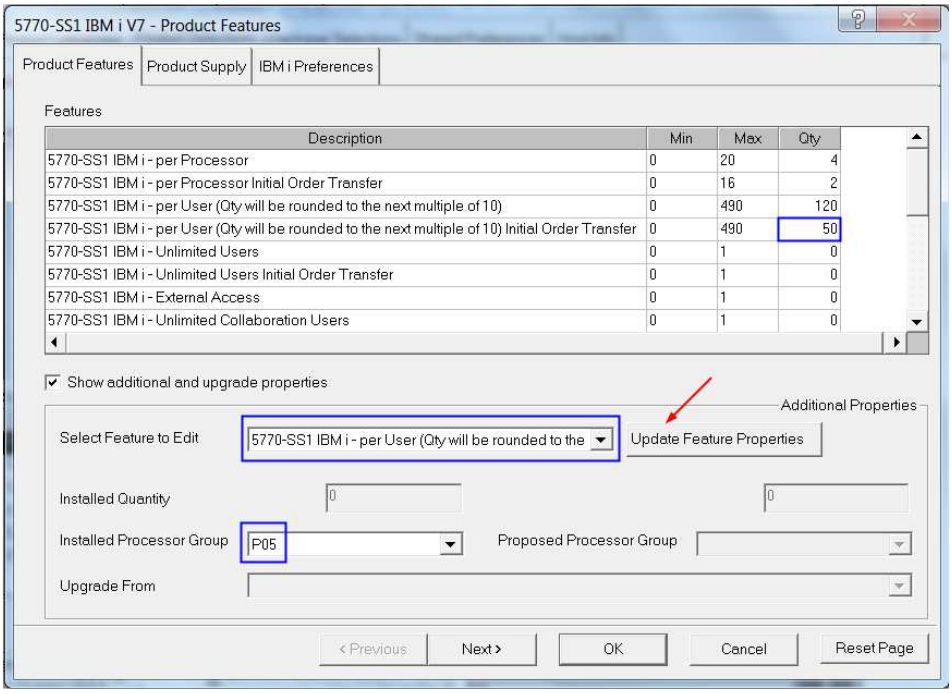
1. In this example we are transferring two IBM i processor entitlements and fifty users from an 8202-E4C (transfer group 4) donor machine to a new S822 node, adding four new processor entitlements and 120 new users and upgrading SWMA to three years with 24x7 support. Begin by editing 5770-SS1 Product Features. Set the per Processor Initial Order Transfer and per User Initial Order Transfer quantities to two and fifty, respectively, then set the per Processor Qty to four and the per User Qty to 120. The next step is to check the "Show additional and upgrade properties" box, which populates the lower portion of the screen. We need to tell e-config the tier group of the software entitlements we are transferring. We are transferring both processor and user entitlements, so we will need to select each feature in turn.



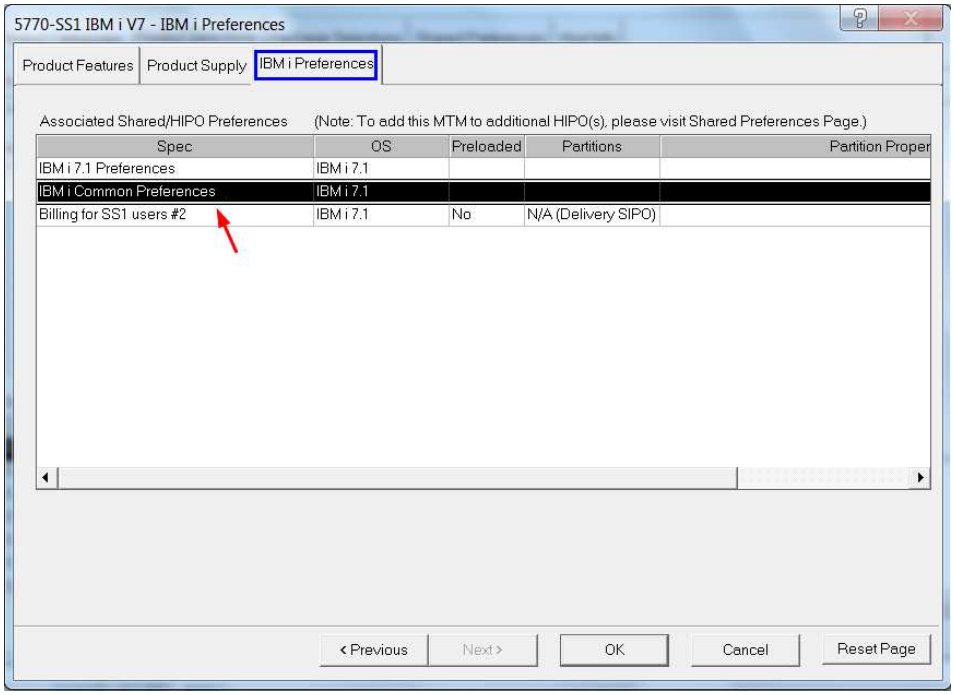
2. Select the IBM i per Processor Initial Order Transfer feature to edit and set the Installed Processor Group to P05. Note if you are transferring both processor and user entitlements, they must be the same group level. **Click the "Update Feature Properties" button to confirm**.



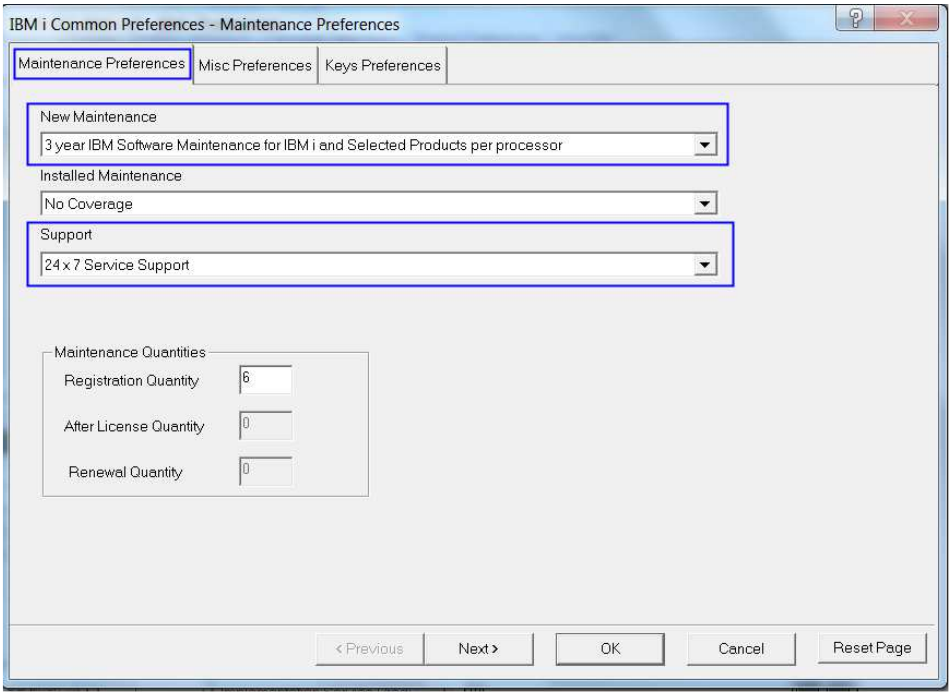
3. Next select the IBM i per User Initial Order Transfer feature to edit and set the Installed Processor Group to P05. Remember if you are transferring both processor and user entitlements, they must be the same group level. **Click the Update Feature Properties button to confirm**.



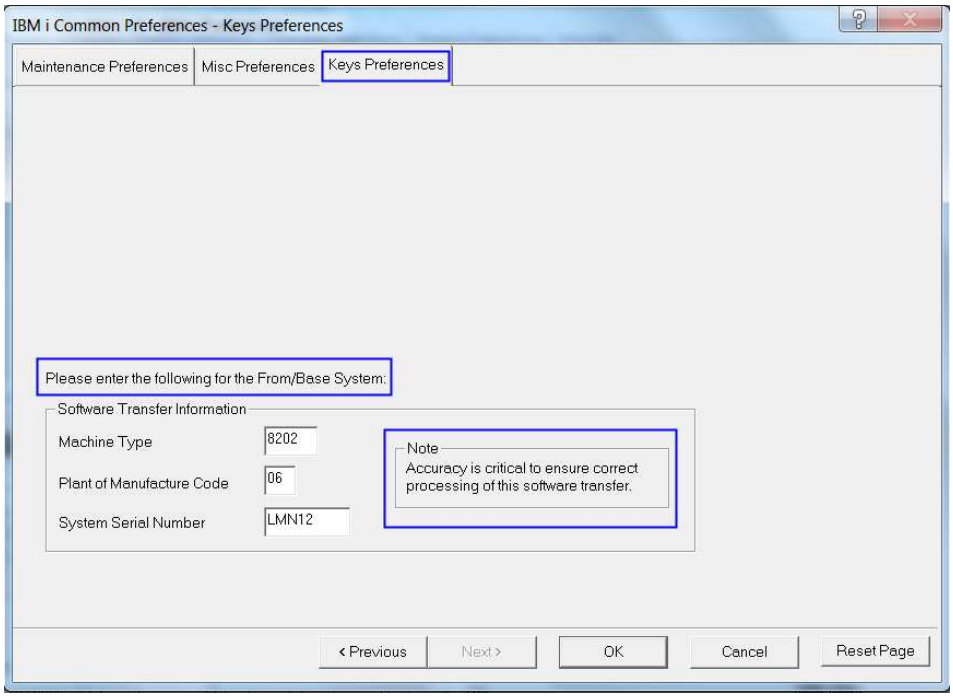
4. Next select the IBM i Preferences tab at the top of the screen and double click on IBM i Common Preferences.



5. Select the Maintenance Preferences tab and choose three year SWMA with 24x7 support. Then select the Keys Preferences tab.



6. On the Keys Preferences tab, enter the Machine Type, Plant of Manufacture Code and System Serial Number of the donor system. Do not guess at the Plant of Manufacture Code (verify on the donor system if needed).



7. Click "OK" on the Keys Preferences tab and then again on the IBM i Preferences tab, then click "Configure." Validate the configuration. A portion of the configuration output for the PurePower System S822 compute node showing the software orders related to our example is shown below. The 40xx features on the 5733-NKY order represent the donor machine.

5733-NKY	Deactivate Software Key and ePoE	1	N/C
2539	IBM i - per Processor (57xx-SS1)	2	N/C
2924	English U/L SBCS Primary	1	N/C
4001	SW Key 1st MT Digit V5	8	N/C
4002	SW Key 2nd MT Digit V5	2	N/C
4003	SW Key 3rd MT Digit V5	10	N/C
4004	SW Key 4th MT Digit V5	2	N/C
4005	SW Key 1st CPU Digit V5	10	N/C
4006	SW Key 2nd CPU Digit V5	6	N/C
4007	SW Key 3rd CPU Digit V5	22	N/C
4008	SW Key 4th CPU Digit V5	23	N/C
4009	SW Key 5th CPU Digit V5	24	N/C
4010	SW Key 6th CPU Digit V5	1	N/C
4011	SW Key 7th CPU Digit V5	2	N/C
5809	5733-ITL Info Letter	1	N/C
6481	IBM i - per User block of 5 (57xx-SS1)	10	N/C
	Serial: 000000000	Total	USD 0.00
5733-SP3	IBM Software Maintenance for IBM i and Selected Products, 3-Year Registration	1	N/C
0004	P10 0Price Per Proc 3Yr Reg	6	N/C
0006	P10 Registration/Renewal 24x7	6	5,556.00
	Serial: 000000000	Total	USD 5,556.00
5733-SPE	IBM Software Maintenance for IBM i and Selected Products, 3-Year Extended Registration	1	N/C
4943	P10 Per Processor 3Yr Reg	6	35,700.00
	Serial: 000000000	Total	USD 35,700.00
5770-SS1	IBM i V7	1	N/C
1525	IBM i per Core (E4x/41A/22A)	4	N/C
1581	OTC per IBM i license transfer (P05 to P10)	2	34,000.00
3441	LPAR System Indicator	1	N/C
3450	Electronic SW Delivery (ESD)	1	N/C
5827	Supply IBM i Lang Group 1 (i7.2)	1	N/C
5872	V7R2M0 Machine Code - RS 720-F(TR3)(20 Nov 2015)	1	N/C
6000	IBM i per Core Registration	4	N/C
6001	ePoE Registration	1	N/C
6100	IBM i per 5 Users Registration	24	N/C
6489	IBM i per Proc Init Order Transfer Registration	2	N/C
6490	IBM i per User Init Order Transfer (blk of 10) Registration	5	N/C
	Serial: 000000000	Total	USD 34,000.00
5770-SSA	IBM i per Processor License Billing	1	N/C
1550	OTC per Core w/ 1-Year SWMA (E4x/41A/22A P10 Tier)	4	59,980.00
	Serial: 000000000	Total	USD 59,980.00
5770-SSC	IBM i per User Billing	1	N/C
1562	OTC per 10 Users (E4x/41A/22A P10 Tier)	12	30,000.00
	Serial: 000000000	Total	USD 30,000.00

Configuring multiple Power compute nodes with IBM i

You may be wondering what happens if you have multiple PureFlex, Flex or PurePower System S822 Power nodes in your configuration and you want to configure the transfer of IBM i entitlements to more than one Power node. The good news is you can do this, you just need to be careful to enter the correct donor machine type/serial number for each new Power node when you are specifying the "From/Base System." E-config and the ordering systems will take care of pairing the software orders associated with each node.

Checklist: Avoid these common problems with IBM i license transfer orders

To help ensure that your IBM i license transfer orders will be successful and that you avoid any negative impact to customer satisfaction and/or your migration schedule, review the following list of the most common problems seen by the Key Center and Power Systems Software Compliance and take any corrective actions needed.

The license transfer orders are tied to the wrong machine. The set of IBM i license transfer orders (5733-NKY, 57xx-SS1 and 5733-SPx) must be tied to the system type/number of the **target** machine. Orders that are tied to the donor machine, to a dummy or non-existent machine, or to an invalid machine type for license transfer such as a Hardware Management Console, **will fail**. As soon as you receive confirmation from your fulfillment organization that your orders have been placed, compare the type/system number associated with the orders to the type/system number of your target machine. If they don't match, immediately cancel the orders. Due to the rapid processing time of software orders, it is unlikely that modifying them will pass the changes to LMS quickly enough to prevent the orders from either failing altogether or creating erroneous records in LMS. If you have to cancel orders, contact the Key Center with the 5733-NKY order number to confirm whether they need to back out any processing that took place in LMS. Wait for the "all clear" from the Key Center before submitting replacement orders.

There is a discrepancy between the entitlements in LMS and the entitlements you are trying to transfer. The 5733-NKY order specifying the entitlements to be transferred between the donor and target machines is processed based on ePOEs in LMS. If you check the IBM i entitlements for the donor machine in Inventory Services or ESS and they are missing or not what you expect, you need to stop and investigate. Work with the Key Center, your asset management organization or the Power Systems Software Compliance and Entitlement Support team (rchalpr@us.ibm.com) to resolve the problems before proceeding with your configuration. It doesn't work to just tinker with the base system in e-config. For example if ESS or Inventory Services shows IBM i for only four processors but the customer thinks it should be five and you just change the quantity using e-config base edit, your license transfer order will fail when it gets to LMS because it won't find a quantity of five processor entitlements to transfer. Likewise an edited or contrived base system that contains dummy serial numbers such as "SNx" or other non-existent software serial numbers for 57xx-xxx products is invalid for IBM i license transfer. Power Systems Software Compliance will direct the Key Center to delete any entitlements created by orders based on invalid base entitlements. Avoid these problems by clearing up any discrepancies in entitlement records before you begin your configuration.

The license transfer orders are placed in the wrong customer number. Don't guess or pick a random customer number or arbitrarily create a new customer number. Make sure that the customer number you use to submit the orders is the correct one. You will have trouble completing the license transfer or retrieving entitlement records in the future if the customer number is incorrect or not properly affiliated to the customer's enterprise.

SWMA is not active on the donor machine at the time the orders are placed. When you first configure and propose IBM i license transfer, make a note of the date that the donor machine's SWMA will expire. If the date is close or you have a long sell cycle, you should retrieve fresh base system records and re-create the configuration when you are ready to submit the orders. It is the seller's responsibility to make sure that the donor machine SWMA entitlement used in the base system is still active and has not expired at the time the IBM i license transfer orders are actually placed.

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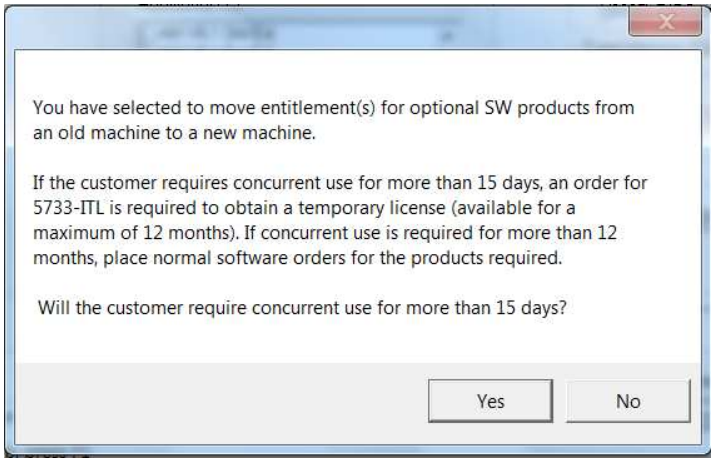
Temporary licensing

The IBM Temporary Software License for i offering (5733-ITL) can be used to obtain temporary licensing for IBM i processors, users, Application Server processors, optional features of IBM i, and other eligible programs and their program options**. If you are migrating to a replacement machine -- either an existing machine or a new one --and transferring software entitlements from a donor machine, concurrent use of the software licenses on both machines is limited to 15 days**. If you are transferring IBM i entitlements to a new target machine, the 15-day period begins when an IPL of IBM i is performed for the first time in any partition on the new machine. If you are transferring IBM i entitlements to an existing target machine, the 15-day period begins as soon as you begin migrating IBM i workload from the donor machine to the target machine; any testing on the target machine prior to actual workload movement counts as migration activities included in the 15-day period. If additional time is needed to complete the migration, temporary software licensing is **required** for one of the machines and can be ordered through 5733-ITL. Temporary licensing is available in one-month increments up to a maximum of one year. When you configure 5733-ITL, you specify a start date for the temporary licensing period, the number of months that temporary licensing is needed, and the desired products or options. The 5733-ITL order generates temporary software license keys that are available on the ESS web site beginning on the start date you specified. Note that temporary licensing does not include any Software Maintenance entitlement.

Configuring temporary licensing

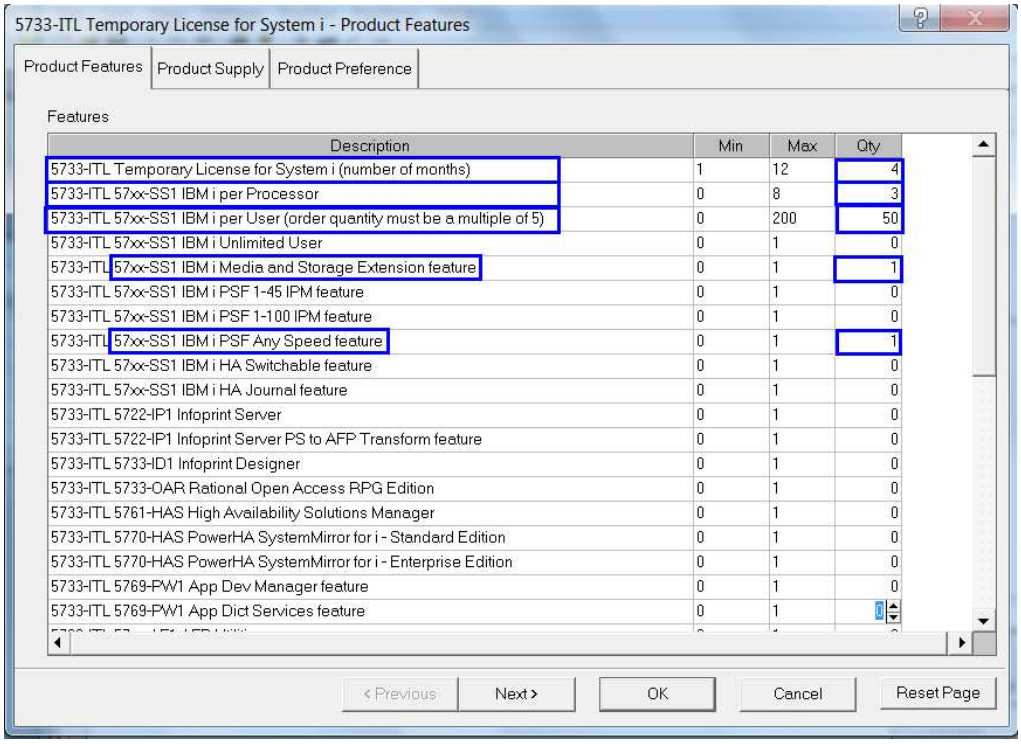
Temporary licensing can be configured in the e-config Software Only, NEWSYS or MES paths but is not available in the Initial Order path. When you configure license transfer in the Software Only or NEWSYS path, e-config will automatically add 5733-ITL if you answer "yes" to the question asking whether the customer will require concurrent use of the software entitlements for more than 15 days. (In the NEWSYS path, you will only see the question about concurrent use of the software entitlements if your base system hardware has the feature code for an IBM i primary system. You can still configure temporary licensing when the base system in your NEWSYS config is not an IBM i primary, but you will have to explicitly select it.) To add temporary licensing, select "5733-ITL Temporary License for System i" under the System Management product category.



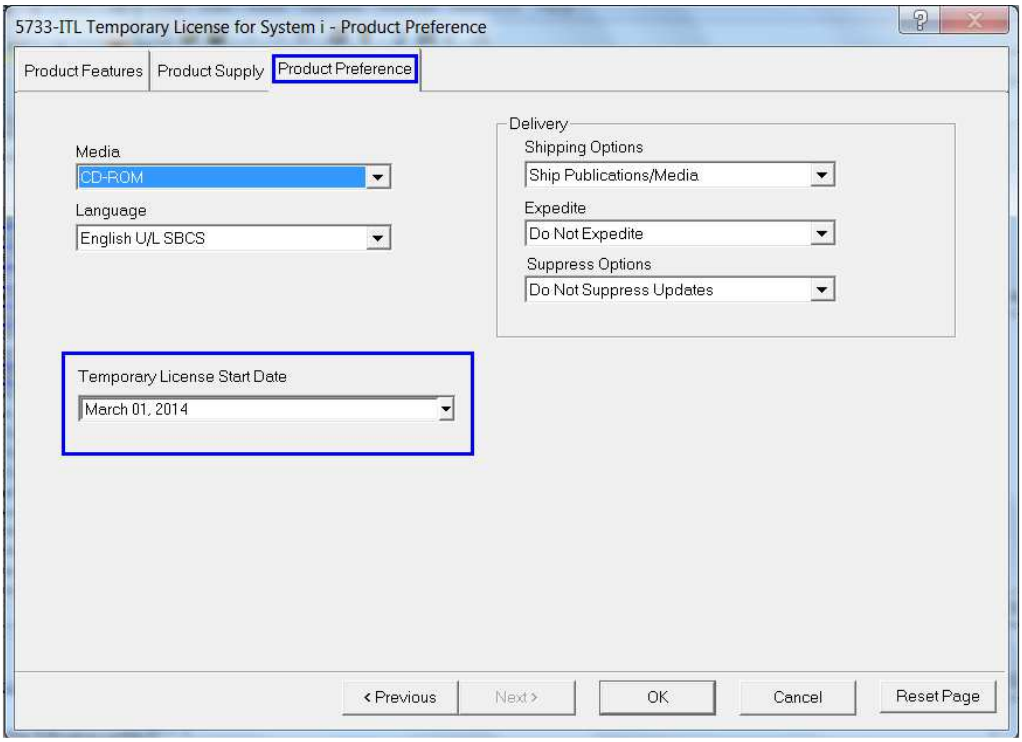
IBM i processors, users and Application Server processors use a different charge metric for temporary licensing than other eligible licensed programs and options. For IBM i processors, users and Application Server processors, the actual number of processors and/or users needing temporary licensing is

specified on the Product Features screen of 5733-ITL. These quantities are then multiplied by the number of months specified to arrive at a total charge for processors and/or users. For licensed programs other than IBM i, a processor group-based monthly charge entitles the customer to run any of the programs for which temporary licensing is offered. The full list of programs eligible for IBM i Temporary Software Licensing is available on the IBM i web site at http://www-03.ibm.com/systems/power/software/i/subscription/index.html#third (scroll down to the bottom and look for "IBM i Temporary Software License (5733-ITL)." When configuring temporary licensing in e-config, you will see only the subset of eligible programs which use license keys; you need to indicate the programs and options you plan to use so that license keys get created. Each program and program option is specified with a quantity of (1) on the Product Features screen of 5733-ITL, however under temporary licensing there is no limit on the number of users allowed for iSeries Access (57xx-XW1) and the number of users allowed for Rational Development Studio (57xx-WDS) is 250.

As an example, the screen capture below shows how you would specify temporary licensing for IBM i for three processors and fifty users, plus the IBM i optional features Media and Storage Extensions and PSF Any Speed, for a period of four months.

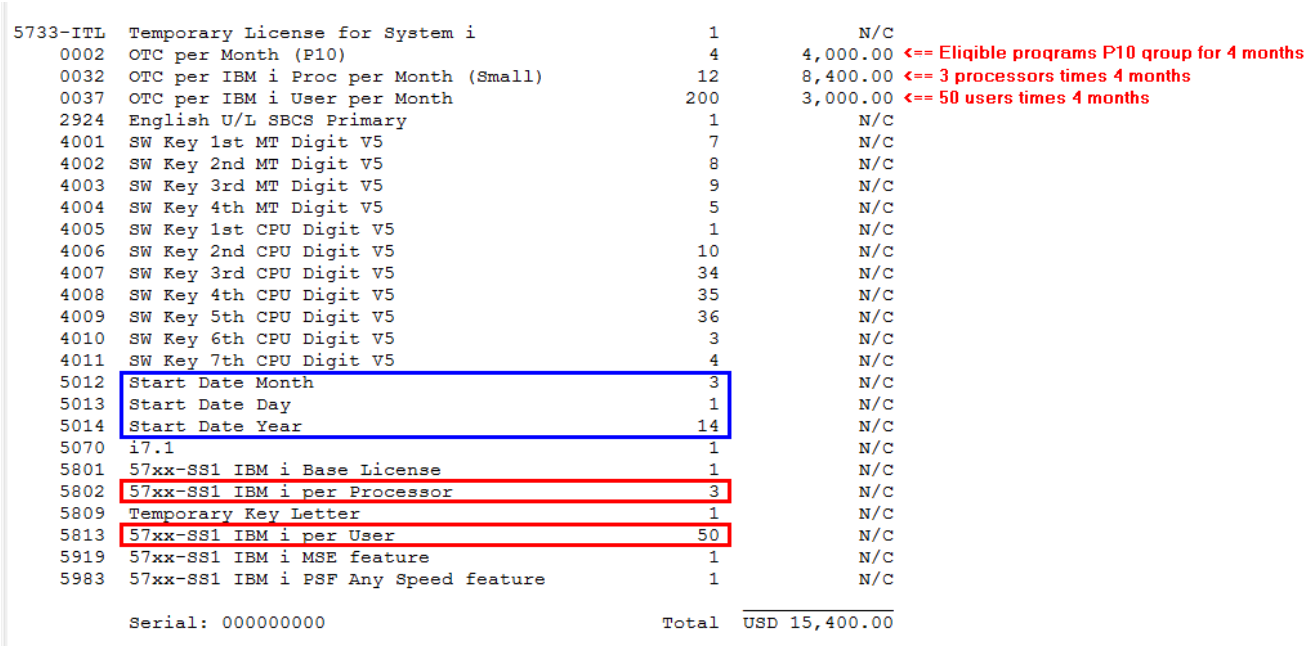


Click on the Product Preference tab to select the start date for your temporary licensing period. The e-config default for the start date is the CRAD date specified in Global Settings, but you can change the start date to whenever you want:



Important: Once you've specified a start date and saved the configuration, e-config doesn't touch the start date thereafter. **Make sure to verify the start date before submitting your configuration file for ordering.** If there is a lot of lag time between when you create the configuration and when it gets ordered and you forget to update the start date, you can lose some of your temporary licensing time if the configuration is ordered with a start date that is in the past instead of the future.

The sample input above results in the following configuration output for 5733-ITL (prices as of this writing in U.S. dollars). The 40xx features on the order specify the machine type/serial number for which temporary license keys are to be created (more on that shortly).



5733-ITL	Temporary License for System i	1	N/C	
0002	OTC per Month (P10)	4	4,000.00	<== Eligible programs P10 group for 4 months
0032	OTC per IBM i Proc per Month (Small)	12	8,400.00	<== 3 processors times 4 months
0037	OTC per IBM i User per Month	200	3,000.00	<== 50 users times 4 months
2924	English U/L SBCS Primary	1	N/C	
4001	SW Key 1st MT Digit V5	7	N/C	
4002	SW Key 2nd MT Digit V5	8	N/C	
4003	SW Key 3rd MT Digit V5	9	N/C	
4004	SW Key 4th MT Digit V5	5	N/C	
4005	SW Key 1st CPU Digit V5	1	N/C	
4006	SW Key 2nd CPU Digit V5	10	N/C	
4007	SW Key 3rd CPU Digit V5	34	N/C	
4008	SW Key 4th CPU Digit V5	35	N/C	
4009	SW Key 5th CPU Digit V5	36	N/C	
4010	SW Key 6th CPU Digit V5	3	N/C	
4011	SW Key 7th CPU Digit V5	4	N/C	
5012	Start Date Month	3	N/C	
5013	Start Date Day	1	N/C	
5014	Start Date Year	14	N/C	
5070	i7.1	1	N/C	
5801	57xx-SS1 IBM i Base License	1	N/C	
5802	57xx-SS1 IBM i per Processor	3	N/C	
5809	Temporary Key Letter	1	N/C	
5813	57xx-SS1 IBM i per User	50	N/C	
5919	57xx-SS1 IBM i MSE feature	1	N/C	
5983	57xx-SS1 IBM i PSF Any Speed feature	1	N/C	
	Serial: 000000000	Total	USD 15,400.00	

For a full description and more information on the terms and conditions of the IBM Temporary Software License for i offering, see U.S.A. announcement letters 207-171 and 209-085 (other geographies search Offering Information for product 5733-ITL).

Donor machine or target machine?

When you want an extended migration period and you need temporary licensing, you have a choice: you can either transfer the IBM i entitlements from the donor to the target immediately and order temporary licensing for the donor machine, or you can order temporary licensing for the target machine to use during migration and then transfer the IBM i entitlements from the donor to the target at the end of the migration period. From a terms and conditions standpoint it doesn't matter whether you order the temporary licensing for the donor machine or the target machine, but as a practical matter it is generally much simpler to order the temporary licensing for the donor machine. Ordering temporary licensing for a new target machine instead is possible but can be much more involved, requiring multiple configurations and orders which could impact your migration schedule. Also note when you order the temporary licensing for the target machine the license transfer charges do not get billed until the end of the migration period when the license transfer orders are actually placed, so make sure that's not a concern.

Temporary licensing on the donor

If your target machine already exists, you can use the Software Only path to configure IBM i license transfer from the donor to the target and include temporary licensing for the donor in the same configuration. Because you are transferring software entitlements you will need to enter both the donor and target serial numbers, but the temporary licensing will always be created for the donor machine. The license transfer and temporary licensing charges are billed at the same time. You can use this method for transfers from and to existing stand-alone Power servers and PureFlex, Flex or PurePower S822 Power compute nodes.

If you are configuring a new stand-alone Power server, you can use the NEWSYS path to configure the new server, IBM i license transfer and temporary licensing for the donor in the same configuration. In the NEWSYS path, e-config will only generate temporary licensing for the donor machine. The license transfer and temporary licensing charges are billed along with the new hardware. You cannot configure PureFlex, Flex or PurePower System S822 Power compute nodes in the NEWSYS path.

If you are configuring a new PureFlex, Flex or PurePower System S822 Power compute node, you can use the Initial Order path to configure the hardware and IBM i license transfer, but the Initial Order path does not allow configuration of temporary licensing. You'll need to do a second configuration in the Software Only path for just temporary licensing, specifying the donor serial number. It is important that the license transfer orders get processed *before* the temporary licensing order so that the license keys for the donor serial number are created correctly in LMS. Also note in this case the temporary licensing bills separately from the hardware and IBM i license transfer, so make sure to plan for that.

Temporary licensing on the target

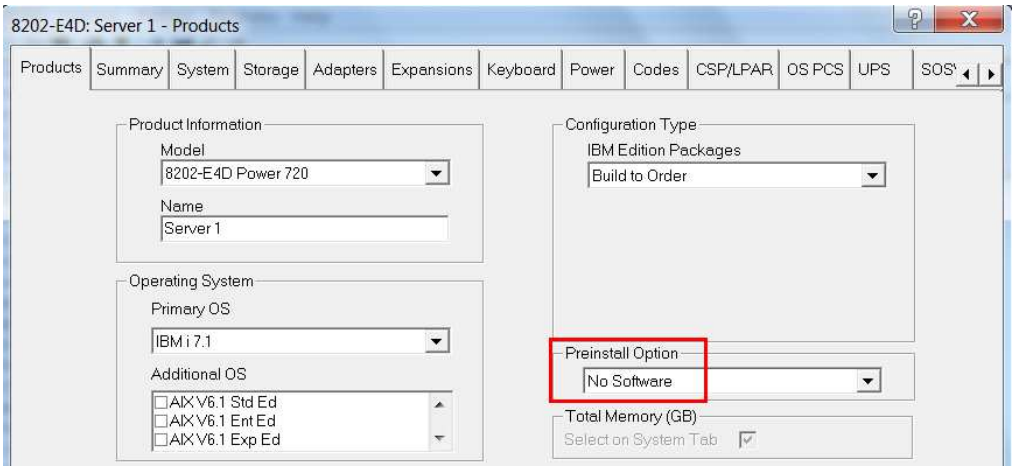
If your target machine already exists and you want to order temporary licensing for the target machine, use the Software Only path to configure just the temporary licensing and specify the target machine serial number. At the end of the migration period, create a new Software Only configuration to transfer the IBM i entitlements from the donor to the target. Note the billing is spread out over separate orders when you do this, so make sure that's not a concern. You can use this method for ordering temporary licensing for any existing target machine, either a stand-alone Power server or a PureFlex, Flex or PurePower System S822 Power compute node.

If you are configuring a **new** target machine and you want to have the temporary licensing on the target and wait to transfer the IBM i entitlements from the donor machine to the target at the end of the migration period, things can get a little more involved. When IBM i is designated as either the primary or an additional operating system on a new machine, e-config will require at least one new or transferred IBM i processor license on the configuration. Your action plan for ordering temporary licensing on the new target machine depends on whether you can satisfy this requirement:

- If you will be ordering at least one *new* IBM i processor license in the same configuration as the new target machine, place the target machine on order and wait for it to be assigned a serial number. Once you get the serial number you can create a Software Only configuration to order temporary licensing for the target machine. At the end of the migration period, you'll need to create another Software Only configuration to transfer the IBM i entitlements from the donor to the target. Notice the billing is spread out over three separate orders when you do this, so make sure that's not a concern. You can use this method for new stand-alone Power servers and PureFlex, Flex or PurePower S822 Power compute nodes, as long as you are ordering at least one new IBM i processor license with the new machine (and the minimum number of new users for models which have user-based IBM i licensing).

- If, however, your intent is to eventually transfer all of the IBM i entitlements that the new target system will need -- that is, you won't be ordering any new IBM i licenses with the machine and you're not ready to transfer any -- your only recourse is to order the new machine with the Preinstall option "No Software" on the server Products screen so that you're not forced to order a new IBM i license**.** If you're going to configure a new stand-alone server in the NEWSYS path, your base system records should only contain the donor hardware; configure the new target machine with "No Software" and place it on order. Once the new target machine is assigned a serial number, you can create a Software Only configuration to order temporary licensing on the

new target. You can use the same approach in the Initial Order path for Flex Power compute nodes but not PureFlex or PurePower initial orders, because "No Software" is not allowed as an option on PureFlex and PurePower initial orders.



With this approach, though, note that "No Software" means zero software, which complicates things if you need PowerVM. You can't have PowerVM on the new target machine order because PowerVM hardware features aren't allowed without the PowerVM software to go with them. If you need PowerVM, you'll have to place the new hardware order without it, then once you have the new machine serial number you can create an MES configuration to add the PowerVM hardware features and PowerVM software, and you can also add the temporary IBM i licensing and any other new software desired in the same MES. If you don't need PowerVM, you can just create a Software Only configuration for the temporary licensing and any other new software needed once you have the serial number of the new machine. Either way, at the end of the migration period you'll need to create a final Software Only configuration to transfer the IBM i entitlements from the donor to the target. Notice the billing is spread out over three separate orders when you do this, so make sure that's not a problem. You can use this method for new stand-alone Power servers and Flex Power compute nodes but not PureFlex or PurePower initial orders, because "No Software" is not allowed on PureFlex or PurePower initial orders.

One final note on temporary licensing: when you are ordering IBM i license transfer and temporary IBM i licensing at the same time, the IBM i license transfer needs to be processed **first** so that the license keys are created with the correct quantities. If you have combined them on a single configuration, despite some safeguards in the system LMS may occasionally process the temporary licensing first and thus the IBM i processor and/or user keys may not have the right quantities. If you have configured IBM i license transfer and temporary licensing on separate configurations but will be submitting the orders together, send the configuration with IBM i license transfer first and wait a minimum of four to six hours after you get the order confirmation before sending the configuration with the temporary licensing to be ordered. It is a good idea to check ESS after all your orders are placed and verify that the keys are what you expect. If you find a problem contact the Key Center for help.

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Frequently Asked Questions

In this section we have attempted to collect and answer the questions most frequently asked of Techline, PartnerWorld, STG Software Terms and Conditions, Power Systems Software Compliance & Entitlement Support and the Key Center regarding IBM i license transfer and related topics.

1. Is Software Maintenance (SWMA) required on both the donor and target machines?

No. SWMA is only required on the donor machine. One year of new SWMA is included for each processor entitlement transferred to the target machine.

2. When transferring IBM i entitlements, does the donor machine need to have SWMA for each processor?

The donor machine must have SWMA coverage for each IBM i processor entitlement to be transferred.

3. Can I upgrade IBM i SWMA to three years on any model when I'm transferring IBM i licenses?

Due to e-config limitations, the option to upgrade IBM i SWMA coverage to three years when you are transferring IBM i entitlements is not available on models in processor group P05.

4. If I am ordering a new target machine, do I need to wait for it to be installed and have entries in ESS before I can do a license transfer configuration?

If you are ordering a new stand-alone Power server as your target machine, you can use the NEWSYS path in e-config to replace the donor machine and transfer IBM i entitlements and any other eligible software to the new target all in the same configuration and order. If you are ordering a new PureFlex or Flex Power compute node, when you configure the new node in the e-config Initial Order path, you can only include IBM i license transfer in the same configuration. After the order is placed and the new node has received a serial number, you will need to do a second configuration in the e-config Software Only path to transfer other eligible software licenses and/or IBM i optional features from the donor machine to the new PureFlex or Flex Power target compute node. The new node does not need to be physically installed before you do the second configuration.

5. Can I configure a new target machine with a later version/release of IBM i than the donor machine?

Yes. Beginning in January 2014, the previous requirement that the donor and target machines must be entitled for the same version/release of IBM i was lifted. A donor machine is now allowed to be entitled

for the ***same or earlier*** version/release of IBM i than the target machine. On a NEWSYS configuration for a new standalone Power server or an Initial Order configuration for a new PureFlex or Flex Power compute node, you can set the IBM i version/release of the new target machine to a later level than the donor machine's entitlement in LMS. During the process to transfer the entitlements from the donor serial number to the target serial number in LMS, the IBM i entitlements will be upgraded as needed. This does not work in reverse -- a donor machine cannot be entitled for a *later* version/release of IBM i than the target machine.

6. Do I have to purchase any new IBM i processor or user licenses on a new target machine or can all IBM i entitlements be transferred entitlements?

All of the processor and/or user entitlements on a new standalone Power server or PureFlex or Flex Power compute node can be transferred entitlements. There is no requirement to purchase a minimum quantity of new entitlements with a new machine.

7. What if my donor and existing target machines are at different version/release levels of IBM i?

In January of 2014 the previous requirement that the donor and target machines must be entitled for the same version/release of IBM i was lifted. A donor machine is now allowed to be entitled for the ***same or earlier*** version/release of IBM i than the target machine. Note that a donor machine cannot be entitled for a *later* version/release of IBM i than the target machine.

8. Can I transfer IBM i to an existing target machine that doesn't have any IBM i entitlement at all, for example an AIX or Linux primary machine?

Yes. If the target machine doesn't have any IBM i entitlement, e-config will add a feature to create a no-charge entitlement record for the base product along with the IBM i processor or user entitlements being transferred.

9. Do I have to transfer all of the IBM i entitlements from a donor machine to the target machines(s) at the same time?

No. If you are moving workloads incrementally you can also move the IBM i entitlements incrementally with multiple license transfer orders spread out over time as needed. Remember you cannot use the entitlements on the donor and target machines concurrently for more than 15 days. Each license transfer order has its own 15-day clock. If you need more time to migrate after any license transfer you must order temporary licensing for one of the machines.

10. Does it ever make sense to pay a Group 4 "Same Group" transfer charge on a P05 tier machine that is more than the cost of licensing IBM i for one or two processors?

The Group 4 transfer charge covers the transfer of just processor entitlements, or just user entitlements, or processors and users together. The tipping point for buy new versus transfer is found in the requirements for user licensing. For example (all pricing shown is U.S.A. list prices):

- There would be no advantage in paying a $5,000 charge to transfer a single IBM i processor entitlement from a P05 tier donor machine to a P05 tier target machine when the price for a new IBM i license for one processor on P05 is only $2,995 (with upgrade to one year of SWMA). But if the donor machine also has 15 users to transfer, you would pay $2,995 for the new processor license plus $3,750 for three new five-user license packages (3 x $1,250), for a total of $6,745 for all new license entitlements versus $5,000 to transfer the donor machine entitlements.

- Similarly, if the donor machine has either Unlimited External Access Users or Unlimited Collaboration Users, which cost $3,995 each, it would cost $6,990 to purchase a new entitlement for either of these features together with a new processor license with one year of SWMA versus the $5,000 license transfer charge.

- Finally, a new P05 tier Unlimited user feature costs $18,750. If you want Unlimited users on the target machine and the donor machine has an Unlimited user feature available to transfer, the $5,000 transfer option is the clear winner, regardless of whether you also transfer a processor entitlement along with it (and it doesn't raise the cost of the transfer charge if you do). Remember that you cannot split up Unlimited users between machines on a transfer -- it is all or nothing.

Note: Software maintenance is not included if only user entitlements are transferred.

11. Why even bother having Groups 1/2/3 and then Groups 4/5/6; why not just have two big groups?

In many cases the difference in capacity between machines in different groups is significant, and the higher charge for transferring IBM i between those machines reflects that.

12. Can Application Server processor entitlements be transferred to PureFlex and Flex Power compute nodes?

No. Application Server processor licensing is only offered for machines in processor groups P20 and above where user-based pricing is not available. Application Server processor entitlements are not eligible to transfer to PureFlex and Flex Power compute nodes, which are either processor group P05 or P10.

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13. Can Application Server processor licensing be the only IBM i licensing on an eligible machine?

No. You must have at least one full IBM i processor entitlement on a machine to use Application Server processor licensing.

14. The iSeries models 870 and 890 are not on the list of eligible donor machines in the IBM i Processor and User Transfer Guide. Is there any way we can transfer the optional IBM i processor entitlements from these models to new machines?

In the U.S.A., Canada, Australia and New Zealand, RPQ P84523 (5799-LXF) provides IBM i entitlement transfer from 9406-870 and 9406-890 donor machines to selected target models. The terms and conditions differ somewhat from the license transfer support available through e-config/AAS; for example, there is no SWMA included for the transferred processor entitlements. The RPQ requires approval to order. See the RPQ description for full details.

15. If in doubt, what is the best procedure to verify IBM i entitlements in IBM records before proposing IBM i license transfer?

First check the entitlement records using Inventory Services (if available for your country) or the ESS web site. If you still have questions, send an email to IBM Power Systems Software Compliance & Entitlement Support at RCHALPR@us.ibm.com.

16. I am trying to configure a transfer of IBM i in the NEWSYS or Software Only e-config paths and the maximum quantity of IBM i entitlements available for transfer shows zero.

E-config checks the processor and user registration feature codes on the 57xx-SS1 product records in the base system to know what entitlements to present to the user as eligible for transfer. If e-config doesn't find the registration features, it will not offer entitlements for transfer. The most common reason that e-config can't find the registration features is that the 57xx-SS1 software product records are missing from the base system. This often occurs in countries where IBM i entitlement data is retrieved from country inventory systems rather than from LMS; some countries purge their records after a certain amount of time, so they are simply unavailable to be retrieved. Other countries may have the software inventory available but the link to retrieve the records may have a problem. In either case the remedy is to check ESS to verify the proper amount of entitlement and then add the required entries to the base system using e-config base edit. Although billing and media features can vary by country, IBM i 57xx-SS1 registration features are consistent across countries.

The registration feature codes for IBM i 5.4 (5722-SS1) and IBM i 6.1 (5761-SS1) on POWER5 and later processors use the format or features below and have a maximum quantity of 1 each:

#60xx -- where "xx" is the number of entitled processors (up to #6064 which is 64 processors)

#61xx -- where #6101 represents 5 users and each higher number adds five more users (up to #6199 for 495 users)
#62xx -- where "xx" is the number of entitled Application Server processors (up to #6264 which is 64 processors)
#6397 -- Unlimited collaboration users
#6398 -- Unlimited users
#6399 -- External access users

The registration feature codes for IBM i 7.1 (5770-SS1) work a little differently. The #6000, #6100 and #6200 features use a fixed feature code with the quantity field indicating the appropriate number of processors or users. The #6001, #6397, #6398 and #6399 features have a maximum quantity of 1 each:

#6000 -- Per processor registration
#6001 -- Base registration
#6100 -- Registration for 5 users
#6200 -- Per Application Server registration
#6397 -- Unlimited collaboration users
#6398 -- Unlimited users
#6399 -- External access users

When adding missing registration features in e-config base edit, it is vital that the features entered match the entitlement shown in ESS. The 5733-NKY order which specifies the entitlements to be transferred between the donor and target machines is processed based on entitlement records in LMS, not country inventory records.

Countries using Inventory Services to retrieve IBM i entitlement data directly from LMS should not have missing 57xx-SS1 6xxx registration features. If you see IBM i entitlements in ESS but they are not retrieved by Inventory Services, contact the Key Center.

One final thing to check is the nature of your entitlements -- IBM i entitlements acquired for a machine under the ISV Development/Demonstration System program or licensed through the IBM i Monthly Licensing Offering are NOT eligible for IBM i License Transfer, so e-config will not present the option.

17.My donor machine is a model 520. Why don't I see the option to transfer unlimited users to my target machine?

The POWER5 model 520 (ordered as 9405-520 or 9406-520) offered only per-processor IBM i licensing, thus there are no per-user or unlimited user entitlements available to transfer to another server. Only the POWER5 520 per-processor entitlement can be transferred.

18. Why can't I transfer IBM i from a donor machine to a new target PureFlex or Flex Power compute node via a NEWSYS config?

For a number of technical reasons it is unworkable to implement NEWSYS for PureFlex and Flex in e-config, so the Initial Order path for PureFlex and Flex systems was enhanced to provide some of the equivalent function.

19. What happens if a product I need to transfer is withdrawn from marketing?

E-config will give you a warning message if any of the new orders on your configuration output are for products that have been withdrawn from marketing, for example 5722-SS1, 5733-QU2, 5770-DE1, etc. In most cases you can notify your fulfillment organization to "open a window" so they can place an order for the withdrawn product to establish an entitlement record on the target machine serial number.

20. How can I verify the hardware machine type, plant of manufacture code and serial number on the features of a software order?

On orders for 5733-NKY, and IBM i and other products being transferred to an existing system, the quantities for 40xx feature codes represent a machine type, plant of manufacture code and hardware serial number. 4001 to 4004 specifies the 4 digit machine type, 4005 to 4006 specifies the 2 digit plant of manufacture code and 4007 to 4011 specifies the 5 character alphanumeric hardware serial number. The quantities for each feature represent a number or letter as shown in the following list:

```
1  = 1                  20 = J
2  = 2                  21 = K
3  = 3                  22 = L
4  = 4                  23 = M
5  = 5                  24 = N
6  = 6                  25 = O
7  = 7                  26 = P
8  = 8                  27 = Q
9  = 9                  28 = R
10 = 0                  29 = S
11 = A                  30 = T
12 = B                  31 = U
13 = C                  32 = V
14 = D                  33 = W
15 = E                  34 = X
16 = F                  35 = Y
17 = G                  36 = Z
18 = H
19 = I
```

For example machine type 9117 with a plant of manufacture code of "10" and the serial number "1A2B3" would appear on configuration output for applicable software orders as:

```
4001  SW Key 1st MT Digit       9
4002  SW Key 2nd MT Digit       1
4003  SW Key 3rd MT Digit       1
4004  SW Key 4th MT Digit       7
4005  SW Key 1st CPU Digit      1
4006  SW Key 2nd CPU Digit     10
4007  SW Key 3rd CPU Digit      1
4008  SW Key 4th CPU Digit     11
4009  SW Key 5th CPU Digit      2
4010  SW Key 6th CPU Digit     12
4011  SW Key 7th CPU Digit      3
```

21. How long does it take the Key Center to make the increased-quantity keys for the target machine available once we send the screen captures showing that the reduced-quantity keys have been installed on the donor machine?

The Key Center's ***target*** turnaround time is 24 hours. Be aware, however, that parts of the Key Center process require a Key Center agent with super user authority, and super users do not work on weekends. When donor machine reduced-quantity key installation verification is received over a weekend, the Key Center agent will verify all the required information and if all is well will generate a temporary increased-quantity key for the target machine (good for seven days) if the 24 hour turnaround target would otherwise be missed. A permanent increased-quantity key for the target machine will be generated once a Key Center super user is available and confirms all the required information. Please note: Key Center agents handle many other requests besides IBM i license transfer, so be sure that when sending your verification information to the Key Center that the subject line of your note says something like "IBM i license transfer -- donor key verification for machine xxxx-yyyyyyy" and that the body of your note confirms both the donor and target machine type/serials. You can also call the Key Center to follow up after sending your note.

22. Is there any way for the Key Center to do some of the verification work for a weekend install ahead of time to avoid a temporary key for the target machine?

Yes. If you know you will be completing key installations for license transfer over a weekend, you can send a "heads up" note to the Key Center early in the same week the transfer is scheduled (not weeks or months ahead). Please note: Key Center agents handle many requests besides IBM i license transfer, so be sure that the subject line of your note says something like "IBM i license transfer planned for [date], please start verification." Include in the note the planned transfer date, the type/serial numbers of the donor and target machines, the order number of the 5733-NKY order and the number of processor and/or user entitlements you will be transferring. A Key Center super user can then complete some of the process in advance so that a regular Key Center agent can access the new permanent key for the target machine over a weekend, assuming all of the required information has been received and verified. Due to the high volume of mail received by the Key Center, it is a good idea to also call after sending your note to make sure they have seen the request.

23. Can I halt or reverse a license transfer in process by canceling the 5733-NKY order?

No. The ordering systems pass the 5733-NKY order over to LMS, which automatically executes the steps to transfer the entitlements as soon as it receives the order. LMS is not notified if a 5733-NKY order is subsequently canceled and does not have any logic in place to "undo" a transfer even if it was aware of a canceled order. The Key Center should be notified if a license transfer order was placed in error. A Key Center agent will need to manually reverse all of the transfer steps. **Every effort should be made to ensure that IBM i license transfer configurations are completely accurate before any orders are placed.** This will help avoid customer satisfaction issues arising from delays and disordered entitlement records.

24. When I place an order for IBM i entitlement transfer, are the reduced-quantity keys for the donor machine temporary keys or permanent keys?

If any IBM i entitlements remain on the donor machine, the new reduced-quantity keys for the donor machine will be permanent keys. If, however, you remove **all** processors and/or **all** users, a 60-day temporary key for one processor and/or one user is created to allow the reduced quantity keys to be installed on the donor machine and leave it in a state that a customer can confirm to the Key Center that the IBM i entitlements have been removed from the machine. Note that the 60-day period is intended **only** to provide some flexibility for when you begin migrating your workload; you still need to order temporary licensing if your migration will take longer than 15 days once it commences.

25. What if I need to order a release upgrade for an existing target machine after the IBM i license transfer orders are placed but before license transfer is complete?

If you have placed orders to transfer IBM i entitlement to an existing target machine but have not yet completed the license transfer process by installing the increased-quantity key on the target machine, you can if needed order a release upgrade for the target machine before completing the license transfer process. After you install the reduced-quantity key on the donor machine and provide verification to the Key Center, the Key Center can upgrade the pending entitlements being transferred to the target machine to the later version/release when they make the new increased-quantity key available for the target machine.

26. I need reduced-quantity keys at earlier version/release levels for my donor machine, but I don't see them in ESS.

Contact the Key Center to get reduced-quantity keys for the donor machine manually created at earlier IBM i version/release levels.

27. How can I enter reduced-quantity keys on a donor machine with only external storage that has been moved to a target machine?

IBM recognizes that once the external storage is removed from a donor machine with no internal disk drives there is no way to enter the reduced quantity keys and take screen captures. In this situation clients can request that the Key Center execute a special exception process that allows the license transfer process to be completed without screen captures. Send an e-mail to WWSWKEYS@dk.ibm.com with the subject line: "**Request to complete IBM i transfer process to target machine *type-model serial XXSSSSS*; donor has SAN/external storage and no internal disk**." Replace "*type-model*" with the correct target machine type-model and "*XXSSSSS*" with the full 7 character serial number of the target machine (a 2 digit numeric prefix followed by 5 alphanumeric characters). **In the body of the note include the client name, type/model/serial of the donor machine and the NKY order number**. The Key Center super users who have the authority to grant the exception do not work on weekends, so if you are migrating on a weekend make sure to send your note early in the week of the migration.

28. What is the difference between the various temporary software key periods and allowable usage limits?

Do not confuse temporary *keys* with temporary *licensing*. When a customer is replacing a machine and transferring software entitlements from the donor to the replacement machine, concurrent use of the software licenses on both machines is allowed for up to 15 days. If the customer will need longer than 15 days to migrate workloads to the replacement machine, an order for 5733-ITL is required to obtain temporary software licensing for one of the machines. This order will generate license keys that are valid for the number of months specified on the order and will expire on a specific date. See the earlier topic "Temporary Licensing" for more information.

There are also situations where temporary keys alone are issued, or when no keys are required:

- In emergencies stemming from ordering or licensing issues in a variety of situations, the Key Center can issue **40-day temporary keys** for any machine to allow time for the situation to be resolved. This is an exception process that requires business justification and IBM authorization. The emergency situation could stem from a problem with an IBM i entitlement transfer transaction, but emergency keys will not be issued in lieu of a customer purchasing temporary licensing if required. Note that the Key Center sends emergency 40-day temporary keys via email; they are not visible on the ESS web site.

- When all processor and/or user entitlements are removed from a donor machine due to an IBM i entitlement transfer, **60-day temporary keys** for one processor and/or one user are created to allow the reduced-quantity key(s) to be installed on the donor machine. The purpose of these temporary keys is to keep the donor machine in a state that allows a customer to confirm to the Key Center that the IBM i entitlements have been removed from the machine. They do not give the customer authorization to keep using the IBM i entitlements on the donor machine beyond the 15-day limit allowed for concurrent use during a migration. Note that *permanent* reduced-quantity keys are issued for the donor machine if not all of the processor or user entitlements are being removed.

- When a customer wants to evaluate the functions of a new product, IBM allows the installation and use of the product for a trial period up to **70 days with no key required**, to give the customer time to determine whether the product meets their needs. No productive use of the product is allowed. The 70-day trial period cannot be used in a migration situation to avoid purchasing temporary licensing, as migration is considered productive use of the product.

- **Two year temporary keys** are issued for the Licensed Program Products (LPPs) on Designated Backup machines and Capacity Backup machines. Two year temporary keys are issued for IBM i and LPPs on machines acquired under the ISV Development/Demonstration program.

29. When do I need to order temporary licensing for IBM i?

If you are migrating to a replacement machine -- either an existing machine or a new one -- and transferring software entitlements from the donor machine, **concurrent use of the software licenses on both machines is limited to 15 days.** If you are transferring IBM i entitlements to a new target machine, the 15-day period begins when an IPL of IBM i is performed for the first time in any partition on the new machine. If you are transferring IBM i entitlements to an existing target machine, the 15-day period begins as soon as you begin migrating IBM i workload from the donor machine to the target machine;

any testing on the target machine prior to actual workload movement counts as migration activities included in the 15-day period. If additional time is needed to complete the migration, temporary software licensing is **required** for one of the machines and can be ordered through 5733-ITL. See the Configuration section on Temporary Licensing for more information.

30. How many days are in "a month" of temporary licensing?

For purposes of temporary licensing a month is considered to be thirty days, however LMS automatically adds six extra days to the **first** month of temporary licensing ordered. This means that if you order a single month of temporary licensing, the expiration date of the temporary keys will be set to 36 days after the configured start date. The six extra days are used to compensate for months that are 31 days long and for leap year, so that if you order a full twelve months of temporary licensing you will have 366 days after the configured start date before the license keys expire.

31. If I need IBM i temporary licensing, am I required to order it for the same number of processors and/or users that I plan to transfer from my donor machine?

Not necessarily. Some customers choose to do smaller-scale testing on the target machine before moving the workload over from the donor machine, and can get by with fewer processors or users for testing on the target during migration. Other customers move a portion of their workload from donor to target immediately and need temporary licensing on the donor for only the portion of the workload that continues to run on the donor during migration testing. It really depends on your migration strategy and plan. Full temporary licensing for all IBM i processors, users and other licensed programs is needed for customers that want to be able to run any or all workloads on either the donor or the target machines during the entire migration period.

32. Why is twelve months the maximum term for temporary licensing? What if we need longer than that?

Twelve months is the maximum allowed by e-config. If you need longer than that, you can place a second order for temporary licensing. Make sure to specify a start date that is one or more days prior to the expiration date of your first set of temporary license keys, and install the second set of temporary keys before the first ones expire. There are no refunds for unused time on temporary licensing if more time is ordered than needed.

33. If I order temporary licensing, when are the temporary keys available?

You should be able to see the temporary keys in ESS three days prior to the configured start date. This gives you time to download and install the keys prior to actually starting your migration activities.

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34. When I order temporary IBM i licensing for my donor machine, do I install the reduced-quantity keys from the license transfer first and then the keys for the temporary licensing?

You only need to install the temporary licensing keys. You can send the proof that you installed the temporary keys to the Key Center as your donor key verification.

35. On the date of their expiration, what time of day do temporary keys expire?

You have all day on the expiration date before the license keys expire. For example, if the expiration date is February 15, the keys will actually expire when the system date changes over to February 16.

36. I ordered temporary licensing but migration is taking longer than expected and I need additional time. What do I do?

You can place another order for temporary licensing. Make sure to specify a start date that is one or more days prior to the expiration date of your current temporary license keys, and install the new temporary keys before the current ones expire.

37. The license keys for my temporary licensing are about to expire. Now what happens?

It depends:

- If you ordered the transfer of **all** IBM i entitlements from the donor machine to the target machine, plus you ordered temporary licensing for the donor, installed those license keys, submitted screen captures to the Key Center and received your new permanent keys for the target machine, you don't need to do anything else on the donor machine when the license keys from your temporary licensing expire.

- If you only ordered the transfer of **some** of the IBM i entitlements from the donor machine to the target machine, plus you ordered temporary licensing for the donor, installed those license keys, submitted screen captures to the Key Center and received your new permanent keys for the target machine, before the keys from the temporary licensing expire you'll need to go to ESS and retrieve and install the reduced-quantity permanent key for the donor machine.

- If you elected to order temporary licensing on the target machine and wait until the end of the migration period to order the transfer of IBM i entitlements from the donor machine, the license transfer order will create the new permanent keys you need to install on both the donor and target machines. Make sure to place the license transfer order before the temporary keys expire.

Exception: If you ordered temporary licensing for LPPs on a machine acquired through the ISV Development/Demonstration program, contact the Key Center for help before the keys from the temporary licensing expire. Ordering temporary licensing for ISV Dev/Demo entitlements that already

have temporary keys causes sequence number issues that can only be resolved by the Key Center manually regenerating the necessary keys.

Revision History

Version	Publish Date	Description of Major Changes
1.0	June 10, 2014	- Initial publication
2.0	December 18, 2015	- Added explanation of S822 support, including NEWSYS and Initial Order examples - Added checklist for avoiding common problems with license transfer orders - Expanded section on verifying IBM i entitlement records - Added new FAQs / re-ordered existing FAQs - Updated machine types and/or release levels in some examples

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