HP AutoPass License Server

For the Windows ® operating systems

Software Version: 8.3

Users Guide



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Chapter 1: Welcome to HP AutoPass License Server

Welcome to HP AutoPass License Server, the HP Web-based solution for managing your HP software product licenses. AutoPass License Server helps you organize and manage your product licenses, server users, and client users.

This guide describes how to install, set up, and use the HP AutoPass License Server.

This guide is intended for users who will install and administer the AutoPass License Server. Users should have some knowledge of system administration.

Chapter 2: Before You Install

The HP AutoPass License Server Users Guide provides the information you need to install and use the HP AutoPass License Server.

To successfully install and run the HP AutoPass License Server, your computer must meet the minimum system requirements shown below. However, performance may be improved by using systems with stronger/later setups than the minimum requirements.

For a list of all supported operating systems, see the HP AutoPass License Server Product Availability Matrix, available from the root folder of the DVD. The most up-to-date product availability matrix is available from the HP Software Product manuals site, at http://h20230.www2.hp.com/selfsolve/manuals (requires an HP passport).

Computer Processor	1.6 Ghz or higher
Operating System	Windows XP Service Pack 3
Memory	A minimum of 1 GB of RAM
Color Settings	High Color (16-bit)
Graphics Card	Graphics card with 64 MB video memory
Protocols	HTTPS must be enabled for products and users who use the License Server.
Port	Port 5814 must be accessible for products and client users to connect to the License Server.
	Note: This is the port number registered with the Internet Assigned Number Authority (IANA) for HP products.
Web Browser	Mozilla Firefox 36.0.4
	Internet Explorer 10.00

Chapter 3: Installation and Setup

Before you begin using the License Server, you must install and set up the License Server.

Before installing, make sure your License Server host computer meets the minimum system requirements. For details, see "Before You Install" on page 11.

This chapter includes the following sections:

- "License Server Installation" below
- "License Server Uninstallation" on the next page
- "License Server Setup and Start" on page 14
- "Installation and Setup Troubleshooting and Limitations" on page 15

License Server Installation

When you install the License Server, you can select a standard installation or a silent installation.

Note: You must have administrator permissions for the computer on which you install the License Server.

Standard Installation

To use the standard installation, double-click the <code>setup.exe</code> installer file and follow the instructions provided by the wizard.

If you need help while installing, click the **Help** button in the relevant window to view a description of the step in the process.

Silent Installation

You can perform a silent installation using either default values or using a response value to provide initialization properties.

Silent Installation with Default Values

To perform a silent installation with the default values for the install and data folders, do the following:

- 1. In the Command Prompt window, enter the directory where the installer file is saved.
- 2. Enter the command "setup.exe" -i silent" and press Enter.

The installation is performed silently using the default installer values.

Silent Installation Using a Response File with initialization properties

To change the default values used for a silent installation, you use the <code>installer.properties</code> file. This file is the default response file name used by the installation. This file must contain the directory of the <code>install</code> and <code>data</code> folders.

To perform a silent installation using a response file, do the following:

- 1. Create a file named installer.properties in the same directory where the installer file is saved.
- 2. In the installer properties file, enter the following:

- 3. In the Command Prompt window, enter the directory path where the installer is saved.
- 4. Enter the command "setup.exe" -i silent" and press Enter.

Note: To use a different response file for the silent installation, replace the command given in step 4 above with the following command:

```
"setup.exe -i silent -f <file name of response file>"
```

This file must also contain the directory for the install and data folders.

License Server Uninstallation

To uninstall the License Server, you can select a standard uninstallation or a silent uninstallation:

Standard Uninstallation

In the Control Panel, select the **Uninstall a Program** option and follow the instructions provided in the uninstall wizard.

Silent Uninstallation

To perform a silent uninstallation, do the following:

1. In the Command Prompt window, enter the directory path to the HP AutoPass License Server folder found in the installation directory, as seen in the example below:

```
"<installation directory>\HP Autopass License Server>"
```

Enter the command "Change HP Autopass License Server.exe" and press Enter.

The License Server is uninstalled.

License Server Setup and Start

After installation, the License Server is automatically started as a Windows service. The license for the License Server is provided with the installation. No additional special setup is required

To launch the License Server, enter the server's Web address into your browser: https://<ipaddress or Host Name>:5814/autopass.

Use the following credentials for the initial login to the License Server:

User name: adminPassword: password

After the initial login, you are required to change the password. You can also create other License Server users with login credentials and access permissions after the initial login. For details, see "License Server User and User Group Management" on page 36.

You are also required to configure the mail server after the initial login. In addition, you can configure other general License Server settings, including:

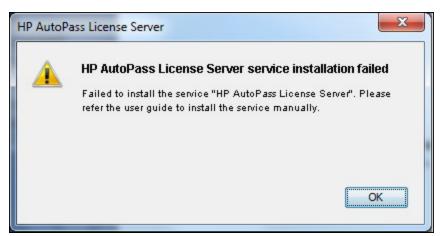
- Server configuration settings
- · License checkout history purge settings
- Audit reporting settings
- Expiration notice settings
- License borrowing settings
- · Server redundancy settings.

For details, see "License Server Configuration" on page 18 and "License Server Redundancy Configuration" on page 27.

Installation and Setup - Troubleshooting and Limitations

What do I do if the License Server failed to install?

If the automatic installation failed, you must manually install the License Server.



To manually install the License Server, do the following:

1. In the Command Prompt window, enter the directory path to the <License Server installation>/bin folder, as seen in the example below:

<installation directory>/HP Autopass License Server/HP Autopass
License Server/bin>

2. After the bin directory path, enter the command hpLicServer.bat install and press Enter.

The License Server is installed on the computer.

What do I do if the License Server failed to uninstall?

If the automatic uninstallation failed, you must manually uninstall the License Server.



To manually uninstall the License Server, do the following:

1. In the Command Prompt window, enter the directory path to the <License Server installation>/bin folder, as seen in the example below:

```
 <installation directory>\HP Autopass License Server\HP Autopass License Server\bin>
```

2. After the bin directory path, enter the command hpLicService.bat remove and press Enter.

The License Server is then uninstalled from the computer.

What do I do if the License Server failed to start?

If the automatic start of the License Server following installation failed, you must manually start the License Server.



To manually start the License Server, do the following:

- 1. In the Command Prompt window, enter services.msc. The Windows Services dialog box opens.
- 2. In the Services (Local) list, right-click HP Autopass License Server, and select Start.

The License Server service is started and you can access the License Server via the Web browser.

Chapter 4: License Server Introduction

The License Server enables you to manage the concurrent licenses for your HP software products.

Software product licenses are broadly classified into two types: **concurrent** (floating) and **seat** (standalone) licenses. A concurrent license is shared dynamically between multiple client users, whereas a seat license is locked to a specific client machine. The concurrent licenses are then shared or "pooled" between a group of users. Using concurrent licenses enables you to purchase the number of licenses equal to the largest number of users liable to be active at any time, instead of the total number of users of a product.

The License Server manages the licenses acquired from the HP license portal. These licenses are then installed on the License Server.

When a client computer needs a license, the client sends a request to the License Server and a license is checked out to this user. After the client user's work session (or when the license expires), the license is returned to the License Server for renewal or for use by other users. If a client user does not have a regular connection to the License Server, the client user can check out a commuter license from the License Server.

Using the License Server, you can:

- Control and managing how the licenses are used
- Create and manage users who are responsible for administering the License Server and the licenses installed on the server
- Manage client user access to the License Server.

Chapter 5: License Server Configuration

This chapter includes:

Concepts

• "License Server Configuration - Overview" on the next page

Reference

• "Main Configuration Tab (Configuration Pane)" on page 20

"License Server Configuration - Frequently Asked Questions" on page 24

Concepts

License Server Configuration - Overview

After installing the License Server, you should set configuration options for the License Server.

Note: Configuration of mail settings is required upon the administrator's first login to the License Server.

You set the configurations for a number of different options:

- Server Mail Configuration
- Check In History Purging
- Server Audit Reports
- License Server Borrowing
- Expiration Notifications
- Server IP Configuration
- Server Discovery

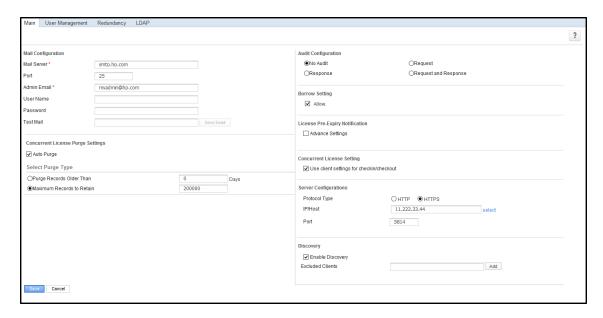
For details about the individual options, see "Main Configuration Tab (Configuration Pane)" on the next page

Note: When logging into the License Server for the first time, you must configure the mail settings for the server.

Reference

Main Configuration Tab (Configuration Pane)

The Main configuration tab enables you to configure general License Server settings.



To access	Configuration pane > Main tab
Important information	You must configure the mail configuration settings after logging into the License Server for the first time.

User interface elements are described below:

UI Element	Description
Mail	Enables you to configure the settings for mail sent by the License Server.
Configuration	You can enter the following details:
	Mail Server: The name of the server from which mail messages are sent from the License Server. (required field)
	Port: The port number from which mail messages are sent from the License Server.
	Admin Email: The sever administrator's email address to send server-related communications. (required field)
	User Name: The server administrator user name. This user name is in addition to the user names created in the "Users Tab (User Management Pane)" on page 44. Default: admin
	Password: The server administrator's user password.
	Test Mail: A mail address to use for a test of the mail configuration settings. Click Send Mail after entering a mail address to test.
Concurrent License Purge	Enables you to set preferences for how often to delete the server operations history.
Settings	Auto Purge: Automatically clears the server operations history according to the settings indicated.
	Note: To stop automatic purging of the records, clear the check box.
	Purge Records Older Than <> Days: Purges all records older than the number of days entered.
	Maximum Records to Retain: The number of server operations to keep in the License Server database, beginning with the most recent operations.
	Note: You can also purge the history of server operations in the Search Results window. For details, see "Search Results Page (License Usage Pane)" on page 70.

UI Element	Description
Audit Configuration	Enables you set the preference for what is reported in the License Server log for checkout and checkin requests and responses.
	You can choose to report one of the following levels:
	No Audit: No record of checkout or checkin requests (default)
	Request: A record of all checkout and checkin requests.
	Response: A record of all License Server responses to license checkout and checkin requests.
	Request and Response: A record of all license checkout and checkin requests and License Server responses.
	Note: It is recommended to select the Request and Response option.
Borrow Setting	Enables you to instruct the License Server to allow license borrowing by other License Servers.
	To prevent a license from borrowing licenses, clear the option.
	For details on license borrowing, see "Borrowing Licenses" on page 60.
License Pre- Expiry	Enables you to send an advance notification to the License Server administrator of approaching product license expirations.
Notification	If you select this option, you must enter the number of days before expiration on which to send the notification.
Concurrent License	Enables you to retrieve the server details directly from a client request, instead of using the values set in Server Configurations .
Setting	When this setting is enabled, the protocol type, IP address or host name, and the entry port are identified from the client's request URL. When disabled, the Server Configurations values are used.
	Default value: Enabled

UI Element	Description
Server	Enables you to set the server details for the License Server.
Configurations	You enter the following details:
	Protocol Type: The connection protocol for accessing the License Server. You can select HTTP or HTTPS.
	Default: HTTPS
	Note: APLS is packaged with the RSA 2048 HP Standard certificate for SSL communication. You can modify the certificate in the server configuration, but we recommend that you use a certificate such as RSA 2048 with SHA 256 to avoid any known security issues.
	IP/Host: The IP address or Host Name of the License Server. You can click Search to browse the subnet for available IP addresses or host names.
	Note: IPv6 addresses must be enclosed with square brackets [].
	Port: The entry port for the server.
	Note: If Concurrent License Setting > Use client settings for checkin/checkout is enabled, the Server Configurations settings are applicable only for Remote Commuter check in and check out. For details, see "Commuter License Check In and Check Out" on page 106.
Enable Discovery	Enables you to allow other License Servers and clients to discover the License Server when searching the subnet to borrow or to check out a license.
	You can configure the following options:
	Enable Discover: Allows other License Servers and client to find the License Server when browsing the subnet.
	Excluded Clients: A list of all License Servers and client computers that are prevented from finding the License Server. Enter a client or License Server IP address and click Add to block License Server discovery.

License Server Configuration - Frequently Asked Questions

Why did the Mail Configuration page open as the start up page when I logged into the License Server?

The Mail Configuration settings are required during the first login to the License Server.

Where does the License Server store the audit log file?

The log file is found at <Your data directory>\Autopass\LicenseServer\data\log>.

How do I change the HP AutoPass License Server .log file location?

To change the .log file location, modify the log4j.properties file located at <Your data directory>\Autopass\LicenseServer\ data\conf>.

To change the .log file location, make sure that the following information is entered into the .log4j.properties file:

```
log4j.logger.com.hp.autopassj=INFO,APJ
log4j.appender.APJ=org.apache.log4j.RollingFileAppender
log4j.appender.APJ.File=<log file path>\\autopassls.log
log4j.appender.APJ.MaxFileSize=10MB
log4j.appender.APJ.MaxBackupIndex=10
log4j.appender.APJ.Append=True
log4j.appender.APJ.layout=org.apache.log4j.PatternLayout
log4j.appender.APJ.layout.ConversionPattern=%-5p- %d{MMM dd HH:mm:s
s} - %m%n
```

Note: You need to restart the License Server in order for the changes to take effect.

How do I change the License Server .log file size?

To change the .log file size, modify the log4j.properties file located at <Your data directory>\Autopass\LicenseServer\ data\conf>.

To change the .log file location, make sure that the following information is entered into the .log4j.properties file:

```
log4j.logger.com.hp.autopassj=INFO,APJ
log4j.appender.APJ=org.apache.log4j.RollingFileAppender
log4j.appender.APJ.File=<Provide the log file path here>\\autopassl s.log
log4j.appender.APJ.MaxFileSize=<log file size>
log4j.appender.APJ.MaxBackupIndex=10
log4j.appender.APJ.Append=true
log4j.appender.APJ.layout=org.apache.log4j.PatternLayout
log4j.appender.APJ.layout.ConversionPattern=%-5p - %d{MMM dd HH:mm:
ss} - %m%n
```

Note: You need to restart the License Server in order for the changes to take effect.

If I disable the Borrow option after another License Server has borrowed licenses, can the borrowing License Server return the licenses?

Yes.

How do I prevent another License Server or a client machine from detecting this License Server?

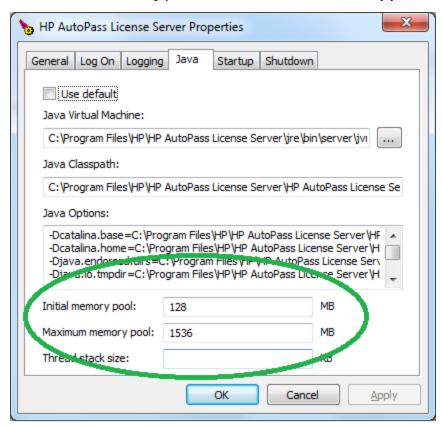
In the Main tab (Configuration pane), enter the License Server's or client's IP address and click **Add**. The client user or License Server is added to the list of Excluded Clients and cannot discover the License Server.

How do I increase Java heap memory size?

To change the Java heap memory, modify the hpLicSvrw.exe file located in <Your installation directory>\HP \bin>.

To modify the memory, do the following:

- 1. Double-click on the hpLicSvrw.exe file.
- 2. Select the **Java** tab.
- 3. In the **Maximum memory pool** field, enter the amount of memory you want.



Note: The maximum amount of memory allowed is 1408 MB.

4. Restart the License Server.

Chapter 6: License Server Redundancy Configuration

This chapter includes:

Concepts

- "License Server Redundancy Overview" on the next page
- "License Server Redundancy Considerations and Limitations" on the next page

Tasks

• "How to Configure License Server Redundancy" on page 30

Reference

• "Redundancy Tab (Configuration Pane)" on page 32

"License Server Redundancy - Frequently Asked Questions" on page 34

"License Server Redundancy - Troubleshooting and Limitations" on page 35

Concepts

License Server Redundancy - Overview

After you install and configure your License Server, you can configure server redundancy for a License Server. Server redundancy¹ is the practice of having a secondary server prepared as a backup to a primary server. This secondary server is operational only when the primary server is unavailable.

By default, each License Server is considered a standalone server immediately after installation. However, each License Server can support an additional License Server to serve as a redundant server.

When both the primary and secondary License Servers are operational, the data in both License Servers is automatically synchronized.

When you configure redundancy in a pair of License Servers, the primary License Server controls the operation of all License Server functions, and defines all configuration settings and information. For example, the configuration settings from the primary server are in effect, regardless of any configuration changes made on the secondary server. Any attempts to access the secondary License Server via a Web browser are redirected to the primary License Server.

If the license of the primary License Server expires, server redundancy is not active and the secondary License Server does not function in place of the primary License Server. In this case, client users cannot check out licenses and checked out licenses cannot be renewed. Likewise, licenses cannot be checked out or renewed if the primary License Server is not operational and the secondary License Server license expires.

Note: Client users can still check in licenses into an expired License Server, regardless of redundancy status or availability.

License Server Redundancy - Considerations and Limitations

When configuring redundancy, note the following:

- Both the primary and secondary License Servers must be the same server version.
- You must configure the secondary License Server before configuring the primary License Server. For task details, see "How to Configure License Server Redundancy" on page 30
- A primary License Server can have only one secondary License Server.
- A secondary License Server cannot be shared with more than one primary License Server.
- A License Server acting as the primary License Server should have a license for the secondary License Server.

¹The configuration in which a backup server is prepared in the event of a failure or unavailability of the primary server.

Users GuideConcepts

• If you configure a standalone License Server as a primary License Server, only the licenses installed on the standalone server are maintained when the server becomes a primary License Server. You must update all other configuration settings.

Tasks

How to Configure License Server Redundancy

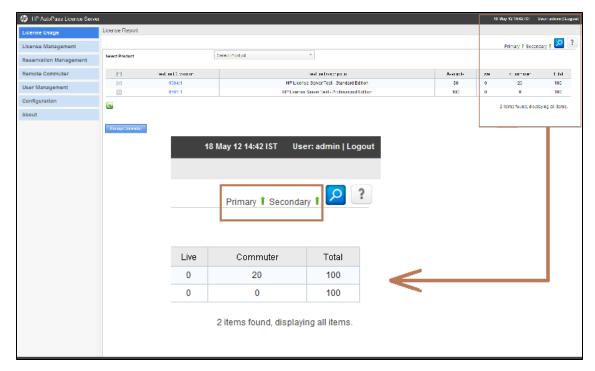
This task describes how to configure server redundancy for the License Server.

- 1. In the secondary License Server, in the Redundancy Tab (Configuration Pane), select the **Enable Redundancy** option check box and the **Act as Secondary** option check box.
- 2. Enter the **Local IP** address in the edit box for the current License Server. If you want to search the subnet for available IP addresses, click **Select** to list all available IP addresses and select an address from the search box.
- 3. In the primary License Server, install the licenses for the primary and the secondary License Servers.

Note: The licenses for the primary and secondary servers should be locked to the primary IP address of the primary License Server.

- 4. In the primary License Server, in the Redundancy Tab (Configuration Pane), select the **Enable Redundancy** option check box.
- 5. Select the Protocol Type.
- 6. Enter the **Local IP**, the **Redundant IP**, the **Redundant Port**, and the **Protocol Port** for the secondary License Server. For details on these options, see "Redundancy Tab (Configuration Pane)" on page 32.
- 7. Click Save.

After redundancy is configured, the server status is displayed in the License Usage pane, as seen in the example below.



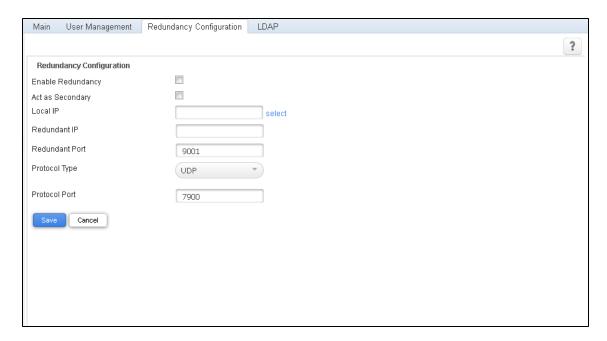
If a server is operational, it is represented by a green arrow pointing upward. If a server is not operational, it is represented with a red arrow pointing downward. If the primary and secondary License Servers are represented by green arrows pointing upward, the primary License Server is handling the server operations.

Note: If you need to change the secondary License Server defined for a primary License Server, you must first configure the primary License Server as a standalone License Server by clearing the Enable Redundancy option. After saving this configuration change, you may then configure the now standalone License Server as a primary License Server with a different secondary License Server.

Reference

Redundancy Tab (Configuration Pane)

This tab enables you to configure License Server redundancy.



To access	Configuration pane > Redundancy tab
Important information	Each primary License Server can have only one secondary License Server.
Relevant tasks	"How to Configure License Server Redundancy" on page 30
See also	 "License Server Redundancy - Overview" on page 28 "License Server Redundancy - Considerations and Limitations" on page 28

User interface elements are described below:

UI Element	Description
Enable Redundancy	Enables the License Server to serve as a primary or secondary License Server.
Act as Secondary	Enables the License Server to serve as the secondary License Server for the primary License Server defined in the IP settings.

UI Element	Description
Local IP	The IP address of the same License Server (the primary License Server if configuring a primary server or the secondary License Server if configuring a secondary server).
Select	Displays the Local IP address of the License Server.
Redundant IP	The IP address for the secondary License Server.
	Note: This option is available only when configuring the primary License Server.
Redundant Port	The port on which the internal database of the secondary License Server listens to synchronize the data between the primary and secondary License Servers.
	Note: This option is available only when configuring the primary License Server.
Protocol Type	The connection protocol for connecting to the partner License Server: UDP (default) or TCP
	Note: If the primary and secondary servers are located in the same subnet, it is recommend to use the <i>UDP</i> protocol. If the servers are on different subnets, you should use the <i>TCP</i> protocol.
Protocol Port	The port on which the primary and secondary License Servers communicate to exchange their status.

License Server Redundancy - Frequently Asked Questions

How can I disable redundancy for a specific primary or secondary License Server?

In the Redundancy tab (Configuration pane), clear the **Enable Redundancy** check box.

How do I define a License Server as a primary License Server?

In the Redundancy tab (Configuration pane), select the **Enable Redundancy** option check box and provide the details for the secondary server, as described in "How to Configure License Server Redundancy" on page 30. For details on the Redundancy tab, see "Redundancy Tab (Configuration Pane)" on page 32.

How do I define a License Server as a secondary License Server?

In the Redundancy tab (Configuration pane), select the **Enable Redundancy** option check box and the **Act as Secondary** option checkbox. Provide the details for the primary server, as described in "How to Configure License Server Redundancy" on page 30. For details on the Redundancy tab, see "Redundancy Tab (Configuration Pane)" on page 32.

License Server Redundancy - Troubleshooting and Limitations

Why can I not connect to the secondary License Server when the primary License Server is down, even after I have configured both License Servers?

You must ensure that both the **Redundant Port** and **Protocol Port** on both License Servers are open. If one or both of the ports are closed on either of the servers, the automatic communication and data synchronization does not work.

Chapter 7: License Server User and User Group Management

This chapter includes:

Concepts

- "License Server Users Overview" on the next page
- "License Server User Groups Overview" on the next page
- "User Group Privilege Levels" on the next page
- "License Server User Group Privilege Matrix" on page 38
- "User and User Group Sources" on page 39

Tasks

• "How to Manage License Server Users and User Groups" on page 40

Reference

- "Users Tab (User Management Pane)" on page 44
- "User Groups Tab (User Management Pane)" on page 46
- "User Management Tab (Configuration Pane)" on page 49
- "LDAP Tab (Configuration Pane)" on page 51

"License Server User and User Group Management - Frequently Asked Questions" on page 55

"License Server User and User Group Management - Troubleshooting and Limitations" on page 56

Concepts

License Server Users - Overview

After initially configuring the License Server, you create administrative users¹ responsible for the creation and maintenance of licenses and client users. License Server users, unlike client users, have access to the License Server functionality to ensure the running and operation of the License Server.

By default, the License Server has one user, named *admin* (which is used to log in to the License Server the first time). On the initial login to the License Server, you log in using the *admin* user. However, after logging in once, you can create additional users and assign them specific roles and privileges for using the License Server.

For details on how to create users, see "How to Manage License Server Users and User Groups" on page 40.

License Server User Groups - Overview

After you create administrative users, you also create user groups. These user groups enable you to group administrative users in a way suited to your organization and license usage.

Example

You create 16 new users for your License Server. These 16 users are responsible for administering the licenses of four different products. Each product has 4 users, who rotate administrative responsibility throughout the day. Using the user groups, you can group each group of four users together to ensure easier and more visible organization of the users.

However, in addition to helping you organize License Server users, you can use user groups to administer License Server access privileges. Depending on a user's group and the corresponding privilege levels, the user has varying access privileges which enable or prevent the user from performing certain administrative tasks. For details, see "User Group Privilege Levels" below.

For details on creating and managing user groups, see "How to Manage License Server Users and User Groups" on page 40.

User Group Privilege Levels

For each user group (and by extension, each user), you assign a specific privilege level. The access privilege level determines the access level to various License Server tasks.

Note: You cannot assign a privilege level directly to a user.

¹A user created in the License Server responsible for administering the License Server.

You can assign any of the following access privilege levels to a group:

- Administrator: Users with this access privilege level are given full permissions to perform all License Server tasks.
- Product Admin: Users with this access privilege level are given full permissions to install and
 maintain licenses for products to which they are assigned. They cannot perform general License
 Server administrative tasks, including License Server configuration and user and user group
 management tasks.
- **View-Only:** Users with this access privilege are allowed to view license information. They cannot perform general License Server administrative tasks.

By default, any new user group is created with the *View-Only* access permission. You can modify this access privilege level later if needed. For details, see "User Groups Tab (User Management Pane)" on page 46.

All users not added to a user group are given View-Only permissions.

For additional details about the specific tasks permitted for each access privilege level, see "License Server User Group Privilege Matrix" below.

For details on creating and modifying user group privilege levels, see "Set user group access privileges" on page 42.

License Server User Group Privilege Matrix

This table specifies the ability to perform various License Server operations based on user group access privileges. For details on setting access privileges, see "Set user group access privileges".

Functionality	Administrator	Product Admin	View Only
Manage Commuter	Yes	Yes*	No
Feature Report	Yes	Yes	Yes
Export Feature Report	Yes	Yes	Yes
Download Commuter/Remote Commuter License Details	Yes	Yes*	No
Search Result Report	Yes	Yes	Yes
Revoke	Yes	Yes*	No
Purge	Yes	No	No
Install License	Yes	Yes	Yes
License Management	Yes	Yes	Yes
Export License Details to Excel	Yes	Yes	Yes

Functionality	Administrator	Product Admin	View Only
Archive Licenses	Yes	Yes*	No
Manage Archived License	Yes	Yes*	No
Borrow License	Yes	Yes*	No
View Checked-In History	Yes	Yes	Yes
Delete/Return the archived licenses	Yes	Yes*	No
License Clean-up	Yes	Yes*	No
Creating a Pool	Yes	Yes	Yes
Mapping feature to a pool	Yes	Yes*	No
Mapping product to a pool	Yes	Yes*	No
Remote commuter check-out	Yes	Yes*	No
Remote commuter check-in	Yes	Yes	Yes
User Management	Yes	No	No
Configuration	Yes	No	No

^{*} Privilege is limited to the product assigned to the product administrator user.

User and User Group Sources

When you create users and user groups, you can choose to store user and user group information in the following locations:

- License Server internal database: All user and user group information is stored locally with the License Server and you can create, modify, and delete data from the database.
- LDAP database: All user and user group information is stored on an external LDAP server. You import the users and/or user groups from the LDAP server into the License Server. You cannot create, modify, or delete data from the LDAP server from within the License Server.

After importing user and user groups from an LDAP server, you cannot modify user information,or add or delete users, as these are stored on the LDAP server. However, you can add users that are imported from an LDAP server to user groups stored on the License Server's internal database and grant those users privilege levels.

Note: If you import user groups from the LDAP server, you cannot add users created and stored in the License Server internal database.

For information on configuring LDAP connection, see "LDAP Tab (Configuration Pane)" on page 51.

Tasks

How to Manage License Server Users and User Groups

This task describes the procedures necessary to create and maintain License Server administrative users and user groups.

This task includes the following steps:

- "Create a user" below
- "Modify a user's status" on the next page
- "Update user details" on the next page
- "Reset a user's password" on the next page
- "Add a user to existing user groups" on page 42
- "Add a new user group" on page 42
- "Update group details" on page 42
- "Set user group access privileges" on page 42
- "Import groups from an LDAP server" on page 43
- "Associate products with a Product Admin group" on page 43

Create a user

1. In the Users tab (User Management pane), click the **Create New User** button



In the Create New User dialog box, enter the first and last name of the user and the user's email address.

Note: You must enter a valid e-mail address because the License Server sends a message containing the user's password details to the address listed.

3. Click Create.

A new user is added to the users table in the upper pane of the Users Tab. The user's details are displayed in the lower pane.

Modify a user's status

- 1. In the upper pane of the Users tab (User Management pane), select the radio button for the user whose status you want to update.
- 2. In the lower pane, click the **Change Status** link.

The user's status changes in the lower pane (to active or inactive).

Note: If a user is listed as *inactive*, the user is unable to log in to the License Server.

Update user details

- 1. In the upper pane of the Users tab (User Management pane), select the radio button for the user whose status you want to update.
- 2. In the lower pane, enter the modified details in the relevant edit boxes.

Note: You can update the email address only for the default administrator.

Click Save.

The new details are displayed in the user table in the upper pane of the Users tab.

Note: You can also modify a user's details by clicking the **<user name>** link at the top of the License Server window after logging in as the user.

Reset a user's password

- 1. In the upper pane of the Users tab (User Management pane), select the radio button for the user whose password you want to reset.
- 2. In the lower pane, click the **Reset Password** link.

The user's password is reset and an e-mail message is sent with the new password to the address defined in the lower pane.

Note: You can also reset a user password by entering a user's login name and clicking the **Forgot Password** link on the License Server login page.

Add a user to existing user groups

- 1. In the upper pane of the Users tab (User Management pane), select the radio button for the user you want to add to a user group.
- 2. In the lower pane, click the **Search** button . The Assign Groups dialog box opens.
- 3. In the Assign Groups dialog box, select the check box for any group to which you want to add the user.
- 4. Click Add.

The selected groups are added to the Associated User Groups list in the lower pane of the Users tab.

Note: To remove a user from a group, click the **Delete** button **Note** next to the group name.

Add a new user group



- 1. In the User Groups tab (User Management pane), click the Create New Group button
- 2. In the Create New Group dialog box, enter the **Group Name**, **Description**, and **Group Email**.
- 3. If you want this group to have administrator access privileges, select the **Mark as** administrator option.
- 4. Click Create.

A new user group is added to the table in the upper pane of the User Groups tab and the group details are displayed in the lower pane.

Update group details

- 1. In the upper pane of the User Groups tab (User Management pane), select the radio button for the user group whose status you want to update.
- 2. In the lower pane, enter the modified details in the relevant edit boxes.
- Click Save.

The new details are displayed in the User Groups table in the User Groups tab.

Set user group access privileges

- 1. In the upper pane of the User Groups tab (User Management tab), select the radio button of the user for which you want to set access privileges.
- 2. In the lower pane, in the Manage User Groups tab, select the access privilege level.
- 3. Click Save.

The Manage User Groups tab displays the correct access privilege level and the privilege level details.

Note: By default, all user groups are initially assigned as View Only.

Import groups from an LDAP server

- 1. In the User Management tab (Configuration pane), select **LDAP** as the source for users and user groups. For details, see "User Management Tab (Configuration Pane)" on page 49
- 2. Click Save.
- 3. In the LDAP tab (Configuration pane), enter the details for your LDAP server. For details, see "LDAP Tab (Configuration Pane)" on page 51.
- 4. Click Save.

The users and/or user groups are added to the Users tab and User Groups tab in the User Management pane.

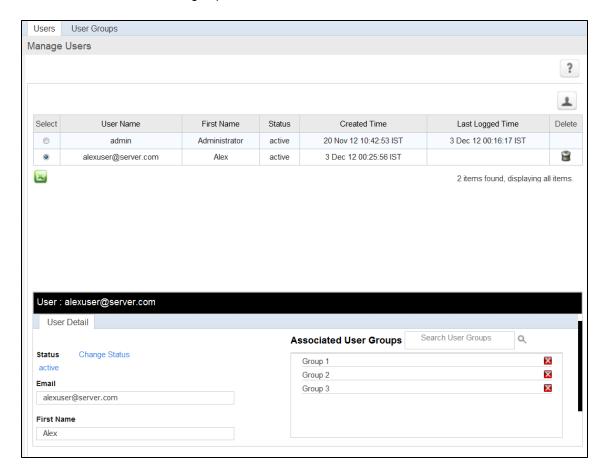
Associate products with a Product Admin group

- 1. In the User Groups tab (User Management pane), select the Product Admin group to which you want to associate products.
- 2. In the Manage User Groups tab (lower pane of the Users tab), click the **Search** button . The Assign Products dialog box opens.
- In the Assign Products dialog box, select the products for this group and click Add.
 The products for this group are displayed in the Associated Products list in the Manage User Groups tab.

Reference

Users Tab (User Management Pane)

This tab enables you to add administrative users to the License Server, add and maintain user details, and add users to user groups.



To access	User Management pane > Users tab
Important information	You can also update user credentials when logged into the License Server by clicking the <user name=""> link at the top of the License Server window.</user>
	Before you create a new user, ensure that the mail server is configured. For details, see "Mail Configuration" on page 21.

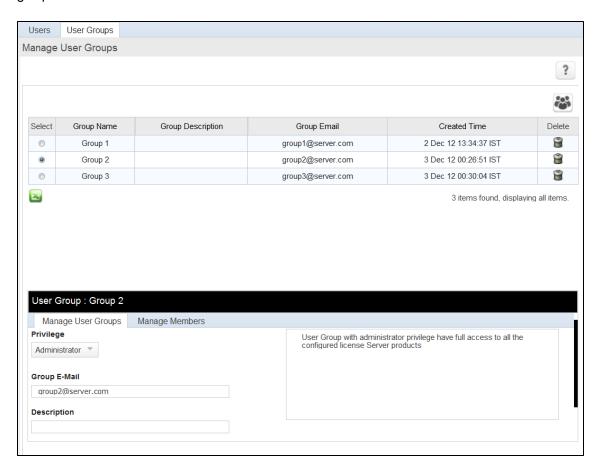
Relevant tasks	 "Create a user" on page 40 "Modify a user's status" on page 41 "Update user details" on page 41 "Reset a user's password" on page 41 "Add a user to existing user groups" on page 42
See also	"License Server Users - Overview" on page 37

UI Element	Description
1	Create User. Opens the Create New User dialog box, enabling you to enter details for a user.
User name	The user name used to log into the License Server.
	Note: The user name displayed in the user table in the Users tab is the email address entered in the Create New User dialog box.
First Name	The user's first name, as entered in the Create New User dialog box.
Status	The user status: active or inactive.
	Users with an <i>inactive</i> status cannot log in to the License Server.
Created Time	The date and time the user was created.
Last Logged Time	The date and time that the user's last logged in to the License Server.
8	Delete. Removes the user from the License Server database.
	Note: If you import users from an LDAP server, clicking Delete only removes them from the License Server's internal database. It does not delete them from the LDAP server.
×	Export to Excel. Exports the currently displayed report to Excel.
Email	The user's email address, as entered in the Create New User dialog box.
Reset Password	Resets the users password. An e-mail message is sent to the user with the new user details.
Associated User Groups	The groups to which the selected user belongs.
٩	Search. Opens the Assign User Groups dialog box, enabling you to assign the user to user groups.

UI Element	Description
×	Removes the user from a user group.
	Note: Clicking this button in the Associated User Groups list does not remove the user from the License Server.

User Groups Tab (User Management Pane)

This tab enables you to create user groups, set access privilege levels, and add users to user groups.



To access	User Management pane > User Groups tab
Important information	Before you create a new user group, ensure that the mail server is configured. For details, see "Mail Configuration" on page 21.

Relevant tasks	 "Add a new user group" on page 42 "Update group details" on page 42 "Set user group access privileges" on page 42
See also	 "License Server User Groups - Overview" "User Group Privilege Levels"
	"License Server User Group Privilege Matrix"

User interface elements are described below:

User Groups Table

UI Element	Description
1	Create User Group. Opens the Create New User Group dialog box, enabling you to enter details for and create a new user group.
Group Name	The name for the group, as entered in the Create New User Group dialog box.
Group Description	The description of the group, as entered in the Create New User Group dialog box.
Group Email	The group email address, as entered in the Create New User Group dialog box. Note: When a new user group is created or deleted, an e-mail message is sent to this address.
Created Time	The date and time of the group's creation.
8	Delete. Removes the selected user group from the License Server internal database. Note: If you imported a user group from an LDAP server, clicking Delete does not remove the user group from the LDAP server.
×	Export to Excel. Exports the currently selected report to Excel.

Manage User Groups tab

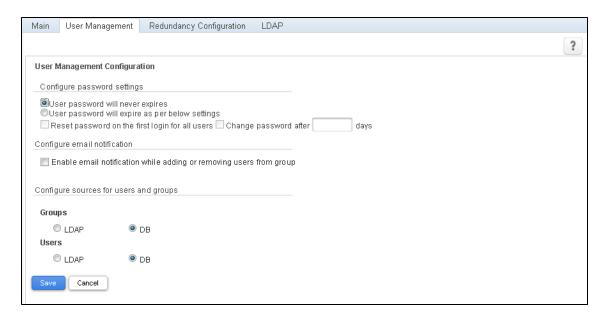
UI Element	Description
Privilege	The access privilege level of the selected group.
	Each group can have one of three privilege levels:
	Administrator
	Product Admin
	View-Only
	The default level for a user group is View-Only.
	For details on the privileges for each type of user, see "User Group Privilege Levels" on page 37.
Associated	The products associated with the selected user group.
Products (for Product Admin groups only)	A user group with Product Admin privilege levels has access privileges only for products listed in this window.
٩	Search. Opens the Assign Products dialog box, enabling you to associate a <i>Product Admin</i> group with currently configured products.
\boxtimes	Delete. Removes a product from association with a <i>Product Admin</i> user group.
Group Description	The description of the group, as entered in the Create New User Group dialog box.
Group Email	The group email address, as entered in the Create New User Group dialog box.

Manage Members Tab

UI Element	Description
<user name=""></user>	Enables you to search the users by name in order to add them to a particular user group.
Q	Opens the Assign Users dialog box, enabling you to select which users to add to a user group.
	Note: The Assign Users dialog box contains all License Server users.
<associated list="" users=""></associated>	The list of all users added to the user group.
X	Remove. Removes a member from a user group.
	Note: Clicking Remove in this tab does not delete the user.

User Management Tab (Configuration Pane)

This tab enables you to set configuration settings for users and user groups.

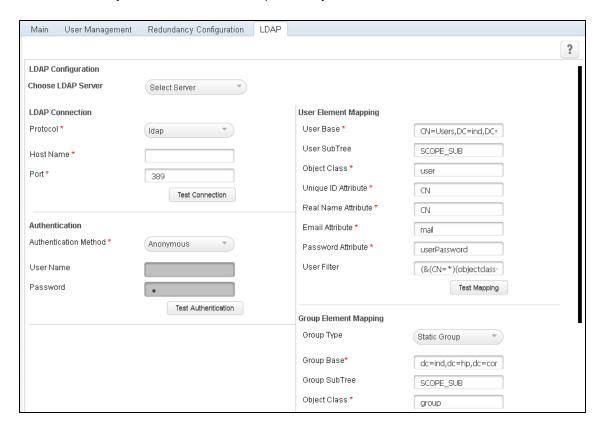


To access	Configuration pane > User Management tab	
Relevant tasks	 "Reset a user's password" on page 41 "Import groups from an LDAP server" on page 43 	
See also	"User and User Group Sources" on page 39	

UI Element	Description
Configure password settings	Enables you to set the options for user password expiration. There are two possible settings:
	User password will never expire.
	User password will expire as per below settings
Reset password on the first login for all users	Requires each License Server user to reset the user's password when they first log in to the License Server (<i>default</i>).
	Note: This option is enabled only if you select the User password will expire as per below settings option.
Change password after <> days	Requires each License Server user to change the password after the defined number of days.
	Note: This option is enabled only if you select the User password will expire as per below settings option.
Enable Email notification while adding or removing users from group	Sends a notification e-mail message to a user when the user is added or removed from a user group. The e-mail message is sent to the address specified for the user in the Users tab (User Management pane). For details, see "Users Tab (User Management Pane)" on page 44.
Configure sources for users and groups	Enables you to select the source for creating License Server users and groups.
	You must select either the License Server internal database (DB) or an LDAP server as a source for both users and user groups.
	Note: The source for users does not have to be the same as the source for the user groups.

LDAP Tab (Configuration Pane)

This tab enables you to define connection options for your LDAP server connection.



To access	Configuration pane > LDAP tab
Relevant tasks	"Import groups from an LDAP server" on page 43
See also	"User and User Group Sources" on page 39

UI Element	Description
Choose LDAP server	Enables you to select the type of LDAP server you are using:
	SunOne
	MicrosoftActive Directory
	When you select either type of server, the default properties are displayed in the pane. However, you can configure any of the properties as needed.

UI Element	Description
LDAP Connection	Enables you to set the specific connection settings for your server, including:
	Protocol: Idap or Idaps
	Host name: The host address for the server
	Port: The entry port for the server
	Note: All fields are required
Authentication Method	Enables you to set the connection authentication properties, including:
	Authentication method (required field)
	anonymous (without authentication parameters)
	 simple (user name and password authentication)
	User name/password: The user name and password required for a simple authentication.
	Note: The user name and password edit fields are enabled only if you select simple as the method of authentication.

UI Element	Description
User Element Mapping	Enables you to configure how users stored on the LDAP server are mapped to their roles in the License Server.
	You can configure the following settings:
	User Base: The location in the LDAP directory containing user entries (required field)
	User SubTree: The sub-directory location in the LDAP server for users (if they are not contained the main directory)
	Object Class: The definition for the users as defined in the LDAP schema (required field)
	Unique ID Attribute: The attribute of the object class that provides the name of the user specified in the object class (required field)
	Real Name Attribute: The attribute of the object class the provides the real name of the user specified in the object class (required field)
	Email Attribute: The attribute of the object class that provides the email address of the user specified in the object class (required field)
	Password Attribute: The attribute of the object class that provides the password for the user specified in the object class (required field)
	User Filter: The filter that identifies the user entries (required field)

UI Element	Description
User Group Mapping	Enables you to configure how user groups stored on the LDAP server are mapped to their roles in the License Server.
	You can configure the following settings:
	Group Type:
	Static Group
	■ Dynamic Group
	Group Base: The location in the LDAP server directory containing the user groups (required field)
	Group SubTree: The sub-directory location in the LDAP server for user groups (if they are not contained the main directory)
	Object Class: The definition for the user groups as defined in the LDAP schema (required field)
	Group Member Attribute: The attribute of the object class the provides the name of the user group specified in the object class (required field)
	Group Filter: The filter that identifies the user group entries

License Server User and User Group Management - Frequently Asked Questions

Does a License Server user have to belong to a user group?

No. However, License Server users that are not assigned to user groups are limited to *View-Only* access privileges.

How do I stop a user from logging in to the License Server?

In the Users tab (User Management Pane), change the user's status to *inactive*. This blocks the user from logging in to the License Server.

How can a user recover a forgotten password?

A user can reset a password in one of the following ways:

- Request that the License Server administrator reset the user's password by clicking the Reset Password link in the "Users Tab (User Management Pane)"
- In the Users tab (User Management Pane), use the **Reset Password** link to reset the user's password. For details, see "Reset a user's password" on page 41.

Why do I need to create user groups?

User groups are created to manage products and assign access privileges to users. After creating user groups, License Server users are assigned to the groups and access privileges are assigned to the user group by a License Server administrator.

Can an administrator assign a privilege level directory to a user?

No. Privileges are assigned by the user group. You must assign or change the access privilege level of the group to which the user belongs.

Note: Any users not assigned to a user group have *View-Only* access privileges.

Can a License Server administrator delete LDAP users or user groups from an LDAP server?

No. You can only remove the imported users and user groups from the License Server. Removing them from the License Server does not delete them from the host LDAP server.

How do I assign the products to which a Product Admin user has administrative access?

In the Manage User Groups tab (User Groups tab), add associated products for each Product Admin group. For details, see "Associate products with a Product Admin group" on page 43.

License Server User and User Group Management - Troubleshooting and Limitations

Why are there no options to configure the password settings or email notifications in the User Management tab (Configuration Pane)?

If you selected LDAP as the source for users or user groups, password settings and email notifications are not available for configuration.

Chapter 8: License Management

This chapter includes:

Concepts

- "Installing Licenses" on the next page
- · "License Usage Reports" on the next page
- "Searching License Check In and History" on page 59
- "Archiving and Restoring Licenses" on page 60
- "Borrowing Licenses" on page 60
- "License Clean Up" on page 61

Tasks

• "How to Manage Licenses" on page 62

Reference

- "License Usage Pane" on page 66
- "Feature Report Page (License Usage Pane)" on page 67
- "Search Criteria Page (License Usage Pane)" on page 69
- "Search Results Page (License Usage Pane)" on page 70
- "Install License Tab (License Management Pane)" on page 72
- "License Management Tab (License Management Pane)" on page 73
- "Archive License Tab (License Management Pane)" on page 74
- "Borrow License Tab (License Management Pane)" on page 75
- "Borrow License Request Window (Borrow License Tab)" on page 77
- "License Clean Up Tab (License Management Pane)" on page 78

"License Management - Frequently Asked Questions" on page 79

"License Management - Troubleshooting and Limitations" on page 82

Concepts

Installing Licenses

After installing and configuring the License Server, you must install licenses in the License Server. This step makes the licenses available for check out operations, and enables you to perform other license management tasks such as reserving licenses for user pools checking out commuter licenses.

You can install licenses by entering a single license key or multiple license key. You can also install licenses by loading a license key file.

Note: The size of the license key file cannot be larger than 4 MB.

You obtain license keys on a per-product and per-feature basis. For details on obtaining license keys, see the individual product documentation.

For details on how to install license keys, see "Install a license" on page 62.

License Usage Reports

After installing licenses, the License Server provides multiple pages in which you can track and view the licenses currently installed and used on your License Server.

The **License Management** tab (License Management pane) displays the basic details about installed feature licenses, including:

- All feature licenses available per product, including their identification number and details
- The installed capacity
- The license start date
- The license expiration date
- The license installation date
- The name of the License Server user that installed the licenses

You can export the license report details to Excel. For details on the License Management tab, see "License Management Tab (License Management Pane)" on page 73.

In addition, usage details about installed licenses are displayed in the **License Usage** pane. This pane displays additional information about the list of all installed license details, including:

- The feature license identification information, including number and description
- The available license capacity
- The capacity currently checked out as live and commuter licenses

Like the License Management tab, you can export the license report details to Excel. For details, see "License Usage Pane" on page 66.

To view the details of a specific feature license, click the feature name in the License Usage pane to display the **Feature Report** page.

The Feature Report page displays specific check out information about a feature license, including:

- The check out start and expiration date
- The type of check out: Live or Commuter
- The capacity checked out
- Check out and check in details for the license
- The pools to which users who have licenses checked out belong

You can also export this report to Excel.

If a license has the ability to control commuter license properties, you also set the commuter license properties in the Feature Report page.

For details on the Feature Report page, see "Feature Report Page (License Usage Pane)" on page 67.

Searching License Check In and History

From the License Usage pane, you can search through the check in and check out histories of all installed licenses.

You can search based on a number of criteria:

- The feature ID and feature ID version
- The feature description
- The client user attributes for a license with check out and check in history
- The license start and expiration dates

You can then use the search results to purge the server operations history or revoke a license check out.

Purging¹ a license deletes the check in history from the License Server. After you purge the history, it is removed from the License Server.

Revoking² a license (by an administrator) forcibly checks in a live concurrent license to the License Server. If you need a license for a higher priority client user or need to return a borrowed license to another License Server, an administrator can revoke a license.

If a connection exists between the License Server and the client computer, when a license is revoked, a message is sent to the client user with the checked out license within two minutes and the license is automatically checked into the License Server within two minutes. If there is no connection, the License Server continues to send the message until the client computer connects with the License Server. You cannot revoke the license until the client user connects with the License Server (provided the license is still within the expiration period).

¹The process of removing the checkin history from the License Server.

²The process of forcibly checking in a live concurrent license to be used for other License Server functions.

Note: Commuter licenses cannot be revoked.

Examples

Use Case 1

You have an installed capacity of 100 for *FeatureA*. *User1* has a live concurrent license capacity of 40 checked out. If *User2* needs a capacity of 80 for check out, you can search for *User1* using the search results and revoke *User1*'s license.

Use Case 2

You are planning how users will use the available capacity for a product in the next iteration. Using the search criteria described on "Search Criteria Page (License Usage Pane)", you can search for licenses with an upcoming expiration date so you can see how many licenses will be available on certain dates.

Archiving and Restoring Licenses

If you do not want a specific license to be available for checkout, but you do want to keep it on the License Server, you can archive a license.

You can archive¹ any unused license that is displayed in the License Management tab. This removes them from the list of currently active licenses (displayed in the License Management tab).

Once a license is archived, you can also delete it from the License Server. If you need to restore a license to active use, you can restore the license and it again becomes available for check out operations.

Borrowing Licenses

If a License Server needs additional licenses to fulfill client user requests for a product or feature, the License Server can borrow² them from other License Servers.

Borrowed licenses are borrowed temporarily, as you set an expiration date for the license borrowing request. After the expiration period, the license is returned to the License Server from which it was borrowed.

You can configure your License Server to borrow only from a specific License Server or to search the subnet for other available License Servers.

Example

FeatureA has an installed capacity of 40. Two users already have licenses for FeatureA with the capacity of 15 checked out. If additional users will need license capacity for check out, you can use the borrow option to take the necessary license capacity from another License Server.

¹The process of removing a license from active use for check out.

²The process of taking license capacity from another License Server.

License Clean Up

In certain circumstances, the license capacity of selected licenses will be deleted, such as in the following scenarios:

- When commuter licenses are lost due to a client user's system crash
- When a product is configured to detect clock tampering and the system is back dated or clocktampered

In this case, you can perform license cleanup¹ to restore the lost capacity.

To perform License Clean Up, you must contact the support team for a License Clean Up key. When you apply the license cleanup key, the license capacity is restored to its previous levels.

Note: Each type of feature or product license has a specific limit for license restoration via license cleanup. For details on viewing and setting the license clean up limits, see the individual product documentation.

¹The process of restoring license capacity for a feature or product due to system crash or clock tampering.

Tasks

How to Manage Licenses

This task describes the procedures necessary to manage the licenses installed on your License Server.

This task includes the following steps:

- "Install a license" below
- "Archive a license" below
- "Restore an archived license" on the next page
- "Borrow a license" on the next page
- "Restore license capacity with License Clean Up" on page 64
- "Search license check in and check out history" on page 64
- "Purge the license check in history" on page 64
- "Revoke a checked out license" on page 65
- "Manage commuter settings for a feature license" on page 65
- "Delete a license from the License Server" on page 65

Install a license

1. In the Install License tab (License Management pane), enter the license keys for your products. For details on obtaining license keys, see the individual product documentation.

Note: If you received a license key in the form of a file (such as a .dat file), you can browse to the license file by selecting **Browse Licenses File** and browsing to the directory containing the file. The license file size cannot exceed 4 MB.

- 2. Click Next.
- 3. In the Install Licenses page, select the licenses to install, and click Install Licenses.

The licenses are installed on the License Server and are displayed in the License Management tab (License Management pane).

Archive a license

- 1. In the License Management tab (License Management pane), select the unused licenses you want to archive.
- 2. Click Archive.

The licenses are removed from the list of installed licenses in the License Management tab and are unavailable for check out operations. A list of all archived licenses is displayed in the Archived License tab (License Management pane).

Restore an archived license

- 1. In the Archived License tab (License Management pane), select the product whose archived licenses you want to restore.
- Select the features to restore.
- 3. Click Restore.

The licenses are again displayed in the License Management pane and client users can check them out.

Borrow a license

- 1. In the Borrow License tab (License Management pane), select the Product for which you want to borrow a license.
- Click Borrow License.
- 3. On the Borrow License page, enter the following details:
 - Select the Product for which you want to borrow a license.
 - The feature ID and version for which you want to borrow a license
 - The license capacity to borrow
 - The expiration date for the borrowed license
 - The server information. You can enter the server information in the following ways:
 - Select Configure License Server and provide the Host Name or IP, the Port, and Protocol of another License Server
 - Select **Discover License Server** and browse through the subnet for an available License Server



3. Click Borrow.

The borrowed license capacity is displayed in the Manage Borrowed Licenses window (Borrow License tab) and is added to the license capacity listed in the License Management tab.

Return a borrowed license

- 1. In the Borrow License tab (License Management tab), select the product for which you need to return licenses.
- Select the license to return.
- Click Return.

The license is returned to the License Server from which the license was borrowed and the borrowed capacity is removed from the list of borrowed licenses in the Borrow License tab and is removed from the License Management tab.

Clear the borrowing history

- In the Borrow License tab (License Management pane), select the product for which you want to view the borrowing history. The Borrowed License list and the Checked-In History list for that product are displayed.
- 2. In the Checked-In History list, select the check box for the history to delete.
- 3. Click Delete.

A message confirming the history deletion is displayed at the top of the window and the selected history items are no longer displayed in the borrowing history.

Restore license capacity with License Clean Up

- 1. In the License Clean Up tab (License Management pane), enter the license cleanup key you received from the support team and click **Submit**.
- 2. In the Clean Up Window, select one or more license checkouts to clean up and click **Clean Up**.

Note: Each license has a limit to the capacity possible for license cleanup. For details on setting limits to license cleanup, see the individual product documentation.

Search license check in and check out history



- 1. In the License Usage pane, click Search
- 2. In the Search window, enter the search criteria.
- 3. Click Search.

All installed licenses that match your search criteria are displayed in the Search Results window.

Purge the license check in history

After the search results are displayed in the Search Results page, click **Purge**.

The history is removed from the License Server.

Revoke a checked out license

- 1. After performing a search, in the Search Results window (License Usage pane), select the license that you need to revoke.
- Click Revoke and confirm the revocation.

The license is returned to the License Server.

Manage commuter settings for a feature license

- In the License Usage pane, click the checkbox for the feature for which you want to manage commuter license settings, and click **Manage Commuter**. A message informing you of the successful enablement of commuter license settings is displayed. Click **OK**.
- 2. The Feature Report page for that feature opens.

Note: Not all features are enabled for modifying commuter check out settings. Only those features with a cleared and enabled check box can be modified.

- 2. In the Commuter Checkout Settings area, click Edit.
- 3. Enter the maximum number of days allowed and the maximum capacity allowed for a commuter license check out.
- 4. Click Save Changes.

The changes are displayed under the Commuter Checkout Settings for the feature.

Note: You must have administrator access privilege permissions to modify the commuter check out settings.

Delete a license from the License Server

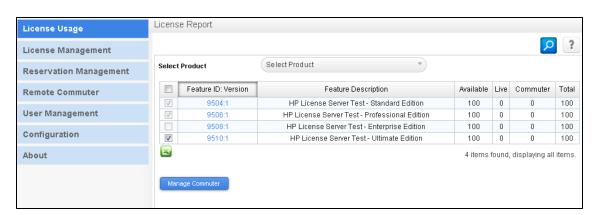
- 1. In the Archived License tab (License Management pane), select the product for which you want to delete licenses.
- 2. Select the feature you want to delete.
- 3. Click **Delete** and confirm the deletion.

The license is removed from the License Server.

Reference

License Usage Pane

This pane enables you to view the installed licenses and license capacities.



To access	Select the License Usage node in the License Server sidebar.
Important information	The licenses displayed in this pane are the same as the licenses displayed in the License Management tab (License Management pane). For details, see "License Management Tab (License Management Pane)" on page 73.
	If a feature is automatically enabled for commuter check out, the feature check box is displayed as a selected, disabled check box.
	If a feature is automatically disabled for commuter check out, the feature check box is displayed as a cleared, disabled check box.
	If a feature is available to have its commuter license check out settings modified, it is displayed in this pane as a cleared, enabled check box.
Relevant tasks	"How to Manage Licenses" on page 62
See also	"License Usage Reports" on page 58

UI Element	Description
Feature ID: Version	The specific feature number and version for each feature of the selected product in the drop-down.
Feature Description	A textual description of a feature.
Available	The license capacity currently available for client user check out.

UI Element	Description
Live	The license capacity currently checked out as live, concurrent licenses.
Commuter	The license capacity currently checked out as commuter licenses.
Total	The total installed license capacity.
×	Export to Excel . Exports the currently displayed License Usage report to an Excel file.
Manage Commuter	Enables you to modify the commuter check out settings for a feature, if enabled.
P	Opens the Search window, enabling you to search the check out and check in history. For details, see "Searching License Check In and History" on page 59 and "Search Criteria Page (License Usage Pane)" on page 69.

Feature Report Page (License Usage Pane)

This page enables you to view the license check out report and details for a specific feature.

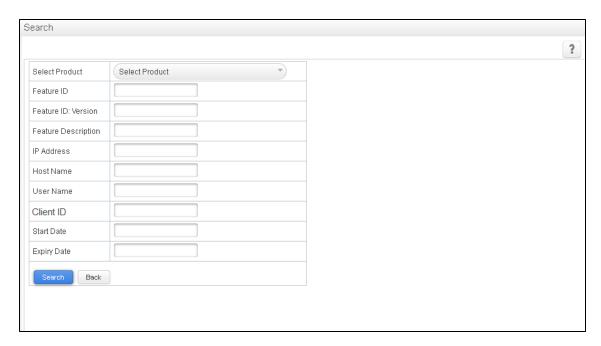


To access	In the License Usage pane, click the Feature ID: Version link for a specific feature.
Important information	The Commuter Checkout Settings area is editable only if the feature allows modifying commuter check out settings and you enabled editing of the settings by clicking Manage Commuter for the selected feature in the License Usage pane.
Relevant tasks	"How to Manage Licenses" on page 62
See also	"License Usage Reports" on page 58

UI Element	Description
Show Checked In Only	If selected, shows only the checked in licenses. If cleared, it shows only the checked out licenses.
Feature ID: Version	The feature number and version.
Feature Description	The textual description of the feature.
Minimum Capacity	The minimum capacity a client user can check out in a checkout request.
Start Date	The start date of a license check out.
Expiry Date	The expiration date of a license check out.
License Type	The type of check out: Live (concurrent license) or Commuter.
Capacity	The capacity checked out by a client user.
Client Info	The user attributes of the user who has checked out the license. Click the Click here link to view the details.
Executed By	The user that checked out the license. Click the Click here link to view the details.
Product	The product the contains the selected feature.
Pool	The user pool to which the client user who has checked out a license belongs.
×	Export to Excel. Exports the currently displayed report to Excel.
Commuter Checkout Settings	 Enables you to select settings for commuter check out of the feature license, including: Maximum number of days allowed. This number is limited by the type of license mentioned in the Product Description for a feature. For details, see the individual product documentation. Maximum capacity allowed. The default setting is Available Capacity, which checks out all available capacity as part of a commuter check out. Change this number if you want to limit the capacity for each check out.

Search Criteria Page (License Usage Pane)

This page enables you to determine the criteria for searching installed licenses.



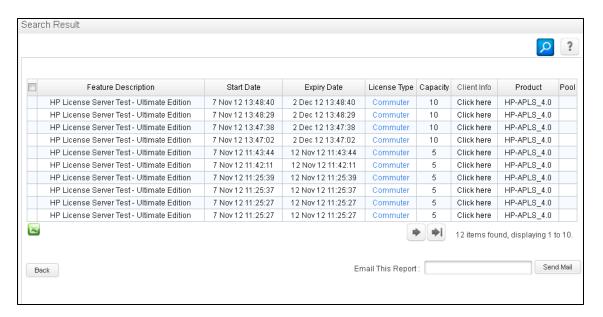
To access	In the License Usage pane, click the Search button .	
Important information	The searchable options for the IP Address , Host Name , User Name , and Client ID should be the same as the user pool attributes listed in the Pool Management tab (Reservation Management tab).	
Relevant tasks	"Search license check in and check out history" on page 64	
See also	"License Usage Pane" on page 66	
	"Search Results Page (License Usage Pane)" on the next page	
	"Searching License Check In and History" on page 59	
	"Pool User List Section (Pool Management Tab)" on page 96	
	"Client User Attributes" on page 85	

UI Element	Description
Feature ID	The number of the feature.
Feature ID: Version	The version number of the feature (without the feature ID).

UI Element	Description
Feature Description	The textual description of the feature. You can use this field if you are unable to remember the specific feature number.
IP Address	The IP address of a client user that has checked out a license.
Host Name	The host address of the client user that has checked out a license.
User Name	The user name for the client user that has checked out a license.
Client ID	The computer ID for the client user that has checked out a license.
Start Date	The start date of a license check out.
Expiry Date	The expiration date of a license check out.

Search Results Page (License Usage Pane)

This page displays the applicable licenses according to your search criteria.

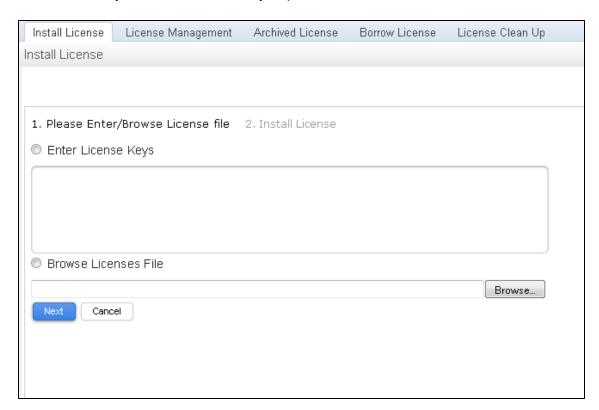


To access	Click Search in the Search window after defining search parameters.
Relevant tasks	"Search license check in and check out history" on page 64
	"Purge the license check in history" on page 64
	"Revoke a checked out license" on page 65
See also	"Search Criteria Page (License Usage Pane)" on the previous page
	"Searching License Check In and History" on page 59

UI Element	Description
Feature Description	The textual description of the licenses returned from the search results.
Start Date	The start date of the license check out.
Expiry Date	The expiration date of the license check out.
License Type	The type of license check out: Live or Commuter.
Capacity	The capacity checked out for the license.
Client Info	The client user that checked out the license.
	Click Click here to display the client user attributes for the check out.
Executed By	The user that performed the check in and check out operation.
	Click Click here to display the details for the check out.
Product	The product to which the product belongs.
Pool	The user pool to which the client user that performed the check out belongs.
×	Export to Excel. Exports the currently displayed report to Excel.
Purge	Deletes the histories from the License Server.
Revoke	Automatically checks the selected license into the License Server.

Install License Tab (License Management Pane)

This tab enables you to install licenses for your products.

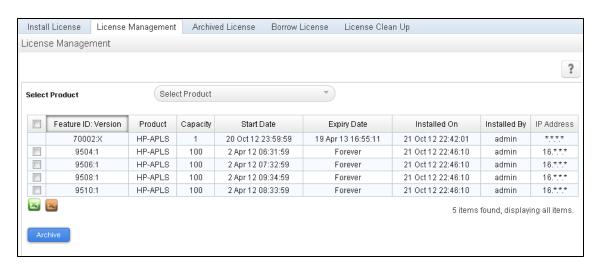


To access	License Management pane > Install License tab
Important information	License key files cannot exceed 4 MB.
Relevant tasks	"Install a license" on page 62
See also	"Installing Licenses" on page 58

UI Element	Description
Enter license keys	Enables you to enter a single license key or group of license keys for installation.
Browse Licenses File	Enables you browse and upload a license key file containing license keys to be installed.

License Management Tab (License Management Pane)

This tab displays the information about all installed licenses and enables you to archive licenses.



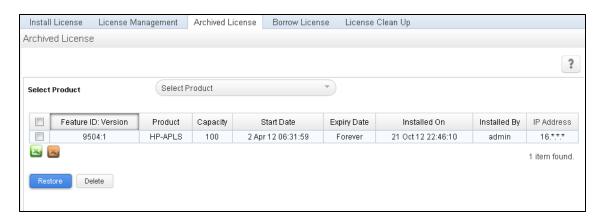
To access	License Management Pane > License Management tab
Relevant tasks	"How to Manage Licenses" on page 62
See also	"Archiving and Restoring Licenses" on page 60

UI Element	Description
Feature ID: Version	The number for the feature and its version number.
Product	The product to which a feature belongs.
Capacity	The total installed capacity for each installed license.
Start Date	The starting date of the installed license.
Expiry Date	The expiration date of the installed license.
Installed On	The installation date of the installed license.
Installed By	The name of the License Server user that installed the licenses.
IP Address	The IP address of the user installing the licenses.
×	Export to Excel. Exports the currently displayed report to Excel.

UI Element	Description
1	Export Raw License to Excel. Exports the license keys for the currently displayed licenses to Excel.
Archive	Archives the selected license.

Archive License Tab (License Management Pane)

This tab displays the list of all archived licenses enables you to restore archived licenses to active use or delete them permanently.

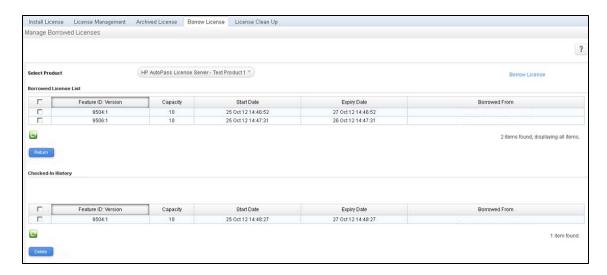


To access	License Management pane > Archived Licenses tab
Important information	Licenses cannot be restored if they are expired.
Relevant tasks	"Restore an archived license" on page 63
See also	"Archiving and Restoring Licenses" on page 60

The user interface elements are the same as those displayed in the License Management tab. For details, see "License Management Tab (License Management Pane)" on the previous page.

Borrow License Tab (License Management Pane)

This tab displays all borrowed licenses and borrowing history, and enables you to borrow licenses from other License Servers.



To access	License Management pane > Borrow License tab
Relevant tasks	"Borrow a license " on page 63
	"Return a borrowed license" on page 64
	"Clear the borrowing history" on page 64
See also	"Borrowing Licenses" on page 60
	"Borrow License Request Window (Borrow License Tab)" on page 77

UI Element	Description
Feature ID: Version	The feature number and version.
Capacity	The capacity borrowed for the selected feature from another License Server.
Start Date	The date on which the license borrowed begins.
Expiry Date	The date on which the license borrowed expires.
Borrowed From	The License Server from which you borrowed a license.
×	Export to Excel. Exports the currently displayed report (from the Borrowed License List or the Checked-In History List) to Excel.

UI Element	Description
Borrow License	Opens the Borrow License window, enabling you to find a License Server from which to borrow a license. For details, see "Borrow License Request Window (Borrow License Tab)" on the next page.

Borrow License Request Window (Borrow License Tab)

This window enables you to borrow licenses from other License Servers.



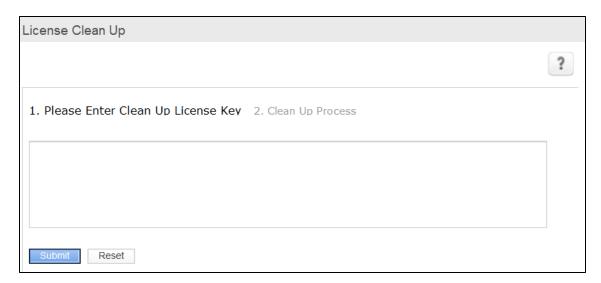
To access	In the Borrow License tab, click the Borrow License link.
Relevant tasks	"Borrow a license " on page 63
See also	"Borrowing Licenses" on page 60
	 "Borrow License Tab (License Management Pane)" on page 75

UI Element	Description
Select Product	The product for which you want to borrow licenses.
Feature ID: Version	The feature for which you want to borrow licenses.
Capacity	The capacity that you want to borrow.
Expiry Date	The date on which the borrowing request ends.
Configure License Server	Enables you to enter the details for a specific License Server from which to borrow the licenses.
	To configure the connection, enter the following:
	The Host Name or IP for the lending server
	The Port for the lending server
	The connection protocol: HTTP or HTTPS
Discover License Server	Enables you to select other License Servers on the same subnet. Select a License Server from the list.
	Click Discover Again to refresh the list.

UI Element	Description
Borrow	Completes the borrowing request.
Manage Borrowed Licenses	Returns to the Managed Borrowed Licenses window, which displays the list of borrowed licenses and check in history.

License Clean Up Tab (License Management Pane)

This tab enables you to restore lost license capacity by performing license cleanup.



To access	License Management pane > License Clean Up tab
Important information	You must have a license Clean Up key to perform license cleanup. Contact customer support to receive a key.
Relevant tasks	"Restore license capacity with License Clean Up" on page 64
See also	"License Clean Up" on page 61

UI Element	Description
Please Enter Clean Up License Key	Enter the License Clean Up Key that you received from support.

License Management - Frequently Asked Questions

The following are frequently asked questions about managing licenses in the License Server.

Where can I see a report of all users that have a license checked out?

In the License Usage pane, click the **Feature ID: Version** link to open the Feature Report for that feature license. The Feature Report displays the usage information for a selected feature license. For details, see "Feature Report Page (License Usage Pane)" on page 67.

Where can I find a summary of the currently used license capacities for a license?

In the License Usage pane, you can see a report of the **Available** license capacity, the currently checked out **Live** capacity, and the currently checked out **Commuter** license capacity.

Why is there an increase in the total capacity of a feature in the License Usage pane?

The capacity of a feature can increase due to one of the following reasons:

- · New licenses are installed.
- The capacity for the feature is borrowed from other License Servers.

Why is there a decrease in the total capacity for a feature in the License Usage pane?

The capacity of a feature can decrease due to one of the following reasons:

- · Licenses for a feature are archived.
- Licenses for a feature expired.
- Borrowed licenses are returned to the License Server from which they were borrowed.

Why is the Pool field blank for some of the licenses listed?

The blank field indicates that the client user that checked out the license does not currently belong to any user pool. For details on user pools, see "License Server Client User Pools" on page 86

How can I purge the license check in history?

License operations history can be purged (deleted permanently) in the following ways:

- Search the records in the Search Page and manually delete them.
- Configure the purge settings in the Main Configuration page. For details, see "Main Configuration Tab (Configuration Pane)" on page 20.

How can an administrator prevent a client user from misusing a license?

An administrator or product administrator can forcibly check in misused licenses by using the **Revoke** option for a license.

How can I reactivate an archived license that is not expired?

Under the Archive License tab (License Management pane), select the licenses to reactivate and click **Reuse**.

Can a client user check licenses into a clock-tampered License Server?

How do I recover the license capacity if the system is back-dated and then returned to the correct date?

Restart the License Server to recover the license capacity.

Why is the license capacity displayed as zero after the system is backdated?

The License Server is set up in such a way that a feature's capacity is blocked when the system time is back-dated. Perform license cleanup and restart the License Server to recover the license capacity.

However, if the system is reset to a future date different than that of a date that was known to the License Server, the feature's license capacity is automatically recovered.

How do I permanently delete a license from the License Server?

You must archive it before deleting it. Once archived, you click **Delete** in the Archived Licenses tab (License Management pane) and the license is removed from the License Server.

If I received a .dat file containing licenses, can I install the licenses on the License Server?

Yes. In the Install License tab (License Management pane), select the option for Browse License File. Browse to the directory containing the license file and install the licenses from that file.

Note: License key files cannot be larger than 4 MB.

If I previously archived a license, can I restore it to active use again?

Yes. In the Archive License tab (License Management pane), select the licenses to restore and click **Restore**. The licenses are added to the licenses listed in the License Management tab (License Management pane), and client users can check out license capacity from this license.

In order to borrow a license, do I have to know the details of other License Servers?

No. You can click **Discover License Server** in the Borrow License Window (Borrow License tab) and search the subnet for available License Servers.

How do I return a borrowed license before the borrowing request expires?

In the Borrow License tab, select the license to return from the Borrowed Licenses list and click **Return**.

Do I have to specify a license capacity to borrow when making a borrowing request?

Yes.

Where do I find the key for license cleanup?

Contact the support team to receive a License Clean Up key.

License Management - Troubleshooting and Limitations

The following are frequently asked questions about problems encountered while managing licenses in the License Server.

After installing licenses in the License Server, why am I unable to view the license details in the License Usage pane?

The product is not yet configured in the License Server. Perform a live check out to configure the product and display the Feature Report for a feature.

Why am I unable to check out licenses?

A client user cannot check out licenses for one of the following reasons:

- The client belongs to a user pool that is blocked. For details, see "Restricting or Blocking User Pools" on page 89.
- The client user belongs to a restricted user pool and the requested capacity is not available for that pool.
- The request capacity is not available for that feature.

Why do I get a message "Lock Type not supported" when installing licenses?

This error message specifies that the installed license keys are locked to a particular IP address range. For example, if the license is locked to IP range 16.*.*, it cannot be installed in a License Server having an IP address 15.1.1.1.

Why am I unable to archive a license?

You can archive licenses only if all the checked out licenses for that feature are returned.

Why is the Revoke option not displayed?

The Revoke option is displayed only if there are valid live licenses currently checked out.

After performing license cleanup, not all of my license capacity was restored. Why?

Each product or feature has a specific limit for license cleanup. This limit is configured in the license key file.

Chapter 9: Client User Management

This chapter includes:

Concepts

- "License Server Client Users Overview" on the next page
- "Client User Attributes" on page 85
- "License Server Client User Pools" on page 86
- "License Reservation Priority" on page 88
- "Feature-Based vs. Product Based Reservation" on page 88
- "Restricting or Blocking User Pools" on page 89

Tasks

• "How to Manage Client User Access" on page 91

Reference

- "Pool Management Tab" on page 95
- "Pool User List Section (Pool Management Tab)" on page 96
- "Pool to Product Mapping List (Pool Management Tab)" on page 98
- "Featured-Based/Product-Based Reservation Tab" on page 98

"Client User Management - Frequently Asked Questions" on page 102

"Client Users Management - Troubleshooting and Limitations" on page 104

Concepts

License Server Client Users - Overview

After configuring the License Server for use and installing licenses, you should create a list of client users who are able to access the License Server. A client user¹ is a local user who accesses the License Server via their local software installation.

When a client user starts the local copy of their software, the software's license mechanism sends a request for license check out to the License Server. The License Server recognizes the user by specific attributes entered and linked with the user's profile. For details, see "Client User Attributes" on the next page.

Depending on the user's details and settings, the License Server finds and checks out an appropriate license for the client user. For details on user access to different types of licenses, see "License Server Client User Pools" on page 86

You can choose to give a client user full feature access to a specific software program, or you can limit which features are available for license check out. Furthermore, you can restrict or block a client user's ability to access or check out available licenses. For details, see "Restricting or Blocking User Pools" on page 89

Example

In *ProductA*, you can choose to load selected environments, such as Web, .NET, Java, Standard Windows, and Oracle. In addition, *ProductA* is sold in conjunction with a defect tracking program (*ProductB*). Thus, you can have licenses that combine *ProductB* and *ProductA* or simply run *ProductA* as a standalone application.

You have a number of licenses for *ProductA* installed on the License Server. Some of these licenses enable full access to all features of *ProductA*, where as others are specific to those features specific to the Web, .NET, Java, Standard Windows, and Oracle environments. There are also additional licenses for *ProductA* with access to *ProductB*.

When a client user accesses the License Server, the appropriate license is checked out. Depending on your configuration of the user pools, the License Server checks outs a license for all *ProductA* features, a specific *ProductA* environment, or the *ProductA/ProductB* common features.

Once the session or license expires on the client user's computer, the license is removed from the client computer and is automatically checked in to the License Server. If a license checked out to a client user is expired, the client user cannot check in the license.

¹A local user that accesses the License Server to check in or check out a license for a local program installation.

Client User Attributes

When a client user sends a request to the License Server, the user is recognized by the client user attributes¹. These attributes confirm the identity of the client trying to access the License Server and enable the local program to check in a license.

The License Server can identify a client user by multiple attributes:

- User name: An identifiable name given to each specific user
- IP Address: The IP address of the client user's computer or the common IP address that a group of client users access to connect to the License Server
- **Host ID**: The hosting address of a client user's computer or the common host address shared by a group of client users
- Client ID: An identification number specific to the client machine

When a client user accesses the License Server, the License Server checks the client user's information against the client user's attributes saved in the User Management system of the License Server. If the client user computer's details match the attributes, the License Server checks out a license to the client user making the request. If even one of the client user's details does not match the attributes stored in the License Server (even if that attribute was simply not entered originally when the client user was created), the License Server can prevent the client user from checking out a license.

It is not necessary to enter all the details for each client user. However, entering all available details for each client user is recommended.

Example

The following attributes are stored for four users:

User Name	IP Address	Host ID	Client ID
User1	192.168.12.54	pool1.host.com	5245rc9e56g648f6
User2	192.168.1.86		4532rac4df15f635
User3	172.31.255.1		
User4	172.20.84.6		

If a client user with the User Name *User 1*, the Host ID *pool2.host.com*, the IP Address *192.168.1.86*, and the Client ID *4532rac4df15f635* then tries to access the License Server, the client's request is denied. Since the Host ID *pool2.host.com* is not included in the attribute list, this client is not able to access the available licenses.

¹The details entered for each user. These details can include the client user's user name, IP address, Host ID, or Client ID.

License Server Client User Pools

In order for client users to access and check out licenses, each client user has to be assigned to a user pool¹.

You can create user pools to organize and maintain client users in any number of ways: users of a specific feature, users of a specific product, users with common attributes, and so on. Client users can be assigned to multiple user pools.

In addition, membership in any user pool connected with a specific product automatically gives a client user access to the **Shared** pool of unassigned licenses.

License access is defined per user pool, not per client user. You assign a specific license capacity (either for specific product features or specific products) for check out by users of the pool. You can also restrict a user pool from check out operations or block all check out operations for a specific pool. For details on restricting or blocking user pools, see "Restricting or Blocking User Pools" on page 89

For details on creating user pools and assigning licenses to a user pool, see "How to Manage Client User Access" on page 91.

License Usage by User Pools

After creating user pools, you can reserve a certain amount of license capacity to each user pool. This is done in the **Feature-Based** and **Product-Based** Reservation tabs. For details, see "Featured-Based/Product-Based Reservation Tab" on page 98.

Each pool is assigned an amount of license capacity as decided by the License Server administrator or Product Administrator. The reserved capacity can exceed the currently available installed capacity. However, license requests from a client user that exceed the installed capacity of the feature or product (even if they are less than the reserved capacity of the user pool) are not fulfilled.

In order to fulfill these requests, you need to install additional licenses or borrow licenses from another License Server. For details on installing additional licenses, see "Installing Licenses" on page 58. For details on borrowing licenses, see "Borrowing Licenses" on page 60.

When you assign license capacity to each pool, you limit the license capacity available for check out to the users in that pool. License requests from client users that exceed the reserved capacity of a pool are not fulfilled.

Note: If a client user is part of another user pool, the License Server also checks the other user pools (based on priority order) to see if other pools have available capacity to fulfill a check out request). For details, see "License Reservation Priority" on page 88.

If a user's request exceeds a pool's reserved capacity, the License Server can also fulfill the request by combining capacity from a user pool with available capacity from the *Shared* pool. The

¹A group of client users which receives access to specific licenses as defined by the License Server administrator(s).

License Server does not fulfill check out requests by combining available capacity from multiple user pools.

Note: Restricted pools cannot combine with the *Shared* pool to fulfill a user request.

In addition, the available installed capacity is consumed on a first-come, first-serve basis, regardless of priority order. If the first request comes from a lower-priority pool, the request is fulfilled.

Examples

In this example, there are three user pools, and the available capacity for a feature is 150, as detailed below:

Pool Name	Reserved Capacity	Restricted/Blocked	Installed Capacity
Pool1	100	No	330
Pool2	50	No	
Pool3	30	No	
Shared	200	N/A	

Use Case 1

A client user in *Pool3* makes a check out request for a capacity of 30. This request is fulfilled, even though *Pool3* is the third pool in the list.

Use Case 2

A client user in *Pool1* makes a check out request for a capacity of 150. Since the reserved capacity for *Pool1* is not sufficient to fulfill this request, the License Server combines the capacity available in *Pool1* with available capacity in the *Shared* pool to fulfill the check out request.

Use Case 3

A client user in *Pool2* makes a check out request for a capacity of 300. Normally, the License Server would combine the available capacity of 50 in *Pool2* with the available capacity in the *Shared* pool to fulfill the request. However, since the request exceeds the combined capacity of 250 (between *Pool2* and the *Shared* pool), the request is not fulfilled until additional licenses are installed or borrowed.

License Reservation Priority

After creating user pools, you can set the priority order for user pools to access licenses. Thus, if a client user belongs to multiple pools, license requests are fulfilled by taking available capacity from the user pools in a set priority order. The priority order also decides the order in which user pools have access to licenses for check out.

Set the priority order for each feature by dragging the user pools listed for each feature or product in the Feature-Based or Product-Based Reservation tabs.

Examples

In the following examples, there are two client user pools, *Pool2* and *Pool3* (set in priority order), as well as the *Shared* Pool, as seen below:

Selected	Selected Feature :9504:1 Available Capacity: 100 Total Capacity: 100			
	Allow/Block	Pool Name	Reserved Capacity	
V	Block	Pool2	25	
V	Block	Pool3	50	
√		Shared	25	
		Total	100	

Use Case 1

The client user belongs to both *Pool2* and *Pool3*. If the client user sends a check out request for a capacity of 10, the License Server tries to fulfill the check out request from *Pool2* based on priority order.

Use Case 2

The client user belongs to both *Pool2* and *Pool3*. If the client user sends a request for a capacity of 60, the License Server tries to fulfill the request first by checking the available capacity in *Pool2*. In this scenario, since *Pool2* and *Pool3* do not have adequate capacity, the license request is fulfilled by combining the higher priority *Pool3* with the Shared pool to complete the license request.

Feature-Based vs. Product Based Reservation

When you reserve licenses for user pools, you can assign licenses in two different ways:

- Feature-Based Reservation: This type of reservation makes licenses available only for specific features within a product. Other product features are not available to client users with a feature-based license.
- **Product-Based Reservation:** This type of license enables a client user to have access to all product features.

The available capacity for a feature is dependent upon the capacity reserved for the product. For example, if you reserve a capacity of 50 for *ProductA* in one user pool, all the features of *ProductA* have a capacity of 50 available for check out by members of the user pool.

You do not have to reserve the same capacity for all features of a product as are reserved for the product itself. Thus, you can reserve a capacity of 40 for a user pool for Feature 1 of *ProductA*, even if the user pool has a capacity of 50 reserved for *ProductA*.

For example, if you want a client user to have access only to specific environments or configurations in a particular product, you reserve licenses using feature-based reservation. If you want a client user to have access to all product features, use product-based reservation.

Allotting features within a product for feature-based reservation is done on a per-product basis. For details on license types and license allotments for products, see the individual product documentation.

Restricting or Blocking User Pools

In addition to limiting the available license capacity for check out, you can also restrict or block user pools from performing check out operations.

Restricting¹ a user pool limits the user pool's ability to check out licenses by limiting the available capacity for check out to only the reserved capacity of the pool. When a pool is restricted, client users cannot combine the available capacity in a user pool with the *Shared* pool to fulfill their license requests.

Example

In this example, the installed capacity of a feature is 100. There is one user pool with a reserved capacity of 40. The shared pool has an available capacity of 60. If a client user sends a check out request for a capacity of 60, the request response is received as seen below:

Pool Names	Reserved Capacity	Installed Capacity	Requested Capacity	Response for Unrestricted Pool	Response for Restricted Pool
Pool1	40	100	60	Request is fulfilled in combination with the <i>Shared</i> pool.	Declined due to insufficient capacity.
Shared	60				

Blocking² a user pool prevents a user pool from performing any check out operations. By selecting the **Block** option for a user pool, all check out operations are prevented and the reserved capacity of the pool is set to **0**.

¹Limiting the ability of a user pool to combine with the Shared pool to fulfill license check out requests that exceed the reserved capacity for a user pool.

²Preventing a user pool from checking out any licenses for a feature or product.

Selected	Selected Feature :9504:1 Available Capacity: 100 Total Capacity: 100			
	Allow/Block	Pool Name	Reserved Capacity	
V	Block	Pool2	35	
V	Allow	Pool3	0	
V	Block	Pool4	15	
✓		Shared	50	
		Total	100	

This option is useful if you want to prevent a particular user group from checking out licenses for a feature, but still allow that group to access other features or products. Since all created user groups are displayed in the Feature-Based and Product-Based Reservation tabs and are therefore available for license reservation, blocking a user group enables you to prevent a user from reserving licenses for a user pool.

Note: Using the **Block** option for a user will block only the selected pool. However, if the user belongs to a different pool which is not blocked, the License Server can fulfill the request based on available capacity in the other pools.

Tasks

How to Manage Client User Access

This task describes the procedures necessary to manage client users and user group access to the License Server.

This task includes the following steps:

- "Add a user pool" below
- "Add a user pool" below
- "Remove a client user's attribute from a pool" on the next page
- "Reserve product license capacity to a user pool" on the next page
- "Reserve feature license capacity to a user pool" on page 93
- "Set the user pool priority order for feature license checkout" on page 93
- "Block a user pool" on page 93
- "Restrict a user pool" on page 94

Add a user pool

1. In the Pool Management tab (Reservation Management pane), click the Create Pool button



- 2. In the Create New Pool dialog box, enter a name and description for the user pool.
- 3. Click Create.

The user pool is displayed in the user pool list in the Pool Management tab (Reservation Management pane).

Note: You can later delete user pools by clicking the **Delete** button .



Add users to a client user pool

- 1. In the Pool Management tab (Reservation Management pane), select the radio button for the pool to which you want to add client users. The lower pane displays the selected pool name.
- In the lower pane, select a client user attribute to add. You can enter the client user's User Name, IP Address, Host ID, or Client ID.

Note: It is recommended (although not mandatory) to enter all available attributes for a client user in the user details. Although a client user does not have to have all attributes included in the user group's details, if a client user tries to access the License Server without having all attributes in the pool's attribute list, the client user cannot access the server. For details, see "Client User Attributes" on page 85.

3. Click Add



The user's details are displayed in the Associated Users area of the lower pane.

Remove a client user's attribute from a pool

- 1. In the Pool Management tab (Reservation Management pane), select the radio button for the pool from which you want to remove client users.
- Click Remove M.

The client user's attribute is removed from the user pool.

Note: Removing a user's attribute from the pool does prevent a user from accessing the License Server. As long as the other client attributes match with the attributes stored in the License Server, the client user can continue to access the server.

Reserve product license capacity to a user pool

1. In the Product-Based Reservation tab (Reservation Management pane), select the product to reserve from the drop-down menu.

Note: All features for the product are also displayed.

2. In the user pool table, reserve a capacity to the available pools.

Note: There is no shared pool for product-based license reservation.

3. Click **Submit**. The feature table is updated to reflect your reservations.

Reserve feature license capacity to a user pool

- 1. In the Feature-Based Reservation tab (Reservation Management pane), select the product from the drop-down menu.
- In the feature table, select the radio button for the feature for which you want to reserve capacity. The lower pane displays the feature name and information and the available user pools.
- 3. In the Reserved Capacity column of the lower pane, reserve a capacity to the available pools.

Note: All unreserved available capacity is automatically assigned to the *Shared* pool.

4. Click **Submit**. The tables in both the lower and upper panes are updated to reflect your reservations.

Set the user pool priority order for feature license checkout

- 1. In the Feature-Based Reservation tab, select the product for which you want to set user pool priority order.
- 2. Select the radio button for the feature for which you want to set user pool priority order.
- 3. In the User Pool Feature Details area, drag the row containing the user pool up or down until the priority is set in the correct order.

Block a user pool

- In the Feature-Based Reservation or Product-Based Reservation tabs (Reservation Management pane), select the product for which you want to block a user pool's check out operations.
- 2. If you are in the Feature-Based Reservation tab, select the feature.
- In the lower pane, click Block for the user pools you want to block and click Submit.

The capacity of the selected user pools is changed to 0 and the user pool's name is displayed in the upper pane (of both the Feature-Based and Product-Based Reservation tabs) with a (r) next to the pool name.

Note: To enable a user pool, click Allow. The previously reserved capacities are restored.

Restrict a user pool

- 1. In the Feature-Based Reservation or Product-Based Reservation tabs (Reservation Management pane), select the product for which you want to restrict.
- 2. If you are in the Feature-Based Reservation tab, select the feature.
- 3. In the Restrict column of the lower pane, select the check box for the user pools you want to restrict.
- 4. Click Submit.

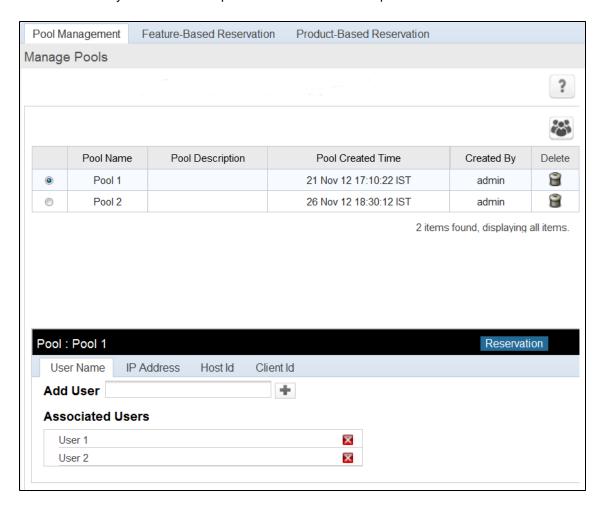
The feature or product table is updated with a (r) next to the feature or product's name. The reserved capacity remains the same.

Note: To clear the restriction, clear the check box for a user pool and click **Submit**.

Reference

Pool Management Tab

This tab enables you to create user pools and add users to user pools.



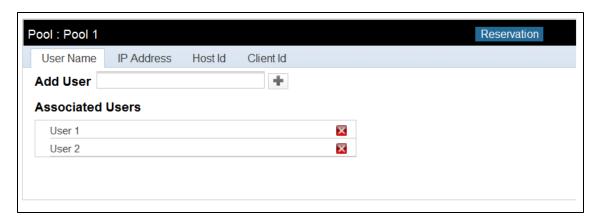
To access	Reservation Management pane> Pool Management tab	
Important information	You must create a user pool before adding client users.	
Relevant tasks	"How to Manage Client User Access" on page 91	
See also	"Pool User List Section (Pool Management Tab)" below	
	 "Pool to Product Mapping List (Pool Management Tab)" on page 98 	
	"License Server Client User Pools" on page 86	
	"License Server Client Users - Overview" on page 84	

User interface elements are described below:

UI Element	Description
1	Create Pool. Opens the Create New Pool dialog box, in which you give a name and description for a new user pool.
Pool name	The user pool name given to a user pool by the License Server administrator.
Pool description	The description of the pool entered when creating the pool. Use a description that enables you to identify the purpose of a specific user pool.
	Note: It is not mandatory to enter a description for a user pool.
Pool Created Time	The date and time of the pool's creation.
Created By	The License Server administrative user or product administrator user that created the user pool.
8	Delete. Removes the user pool.

Pool User List Section (Pool Management Tab)

This section enables you to add client user attributes to a user pool.



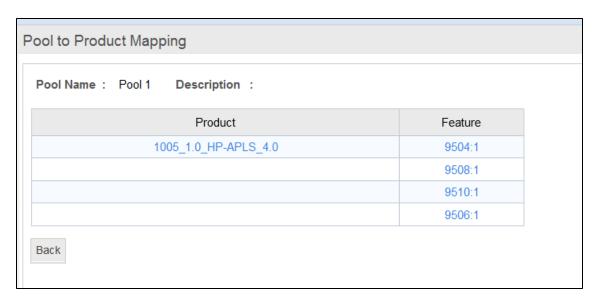
To access	In the Pool Management tab (Reservation Management pane), select the radio button for a user pool.	
Important information	Pool user details displayed in this window are dependent upon the user pool selected in the Pool Management tab.	
	It is not necessary to enter all user attributes for each client user. However, entering all attributes for each client is recommended (if they are available).	

Relevant tasks	"How to Manage Client User Access"
See also	"Pool Management Tab"
	"Pool to Product Mapping List (Pool Management Tab)"
	"Client User Attributes"

UI Element	Description
User Name	The Windows or Unix user name of a client user.
	Note: The user name must use the following syntax: DOMAIN/USER NAME
IP Address	The IP address of the computer from which the client user accesses the License Server.
Host ID	The host address for the computer the client user uses to access the License Server.
	To find the host address for the client user's computer, enter <pre>ipconfig/all</pre> in the Command Prompt window. The Host ID is the host name with the DNS suffix displayed in the results.
	Note: The Host ID must use the following syntax: <host name="">. DNS SUFFIX>.</host>
Client ID	A unique value for each client user.
•	Add Attribute. Adds an attribute to the user pool after you enter the information in the edit field.
Associated Users/IPAddresses/H ost ID/Client ID	The list of Users, IP Addresses, Host IDs, or Client IDs that have been added to the user pool.
×	Remove. Removes an client user's attribute from the user pool.

Pool to Product Mapping List (Pool Management Tab)

This page enables you to view information on the products and features reserved for a specific user group.



To access	In the Pool Management tab (Reservation Management tab), click the Reservation button in the Pool User List section (lower pane).
Relevant tasks	"How to Manage Client User Access"
See also	"Pool Management Tab"
	"Pool User List Section (Pool Management Tab)"
	"Feature-Based vs. Product Based Reservation"

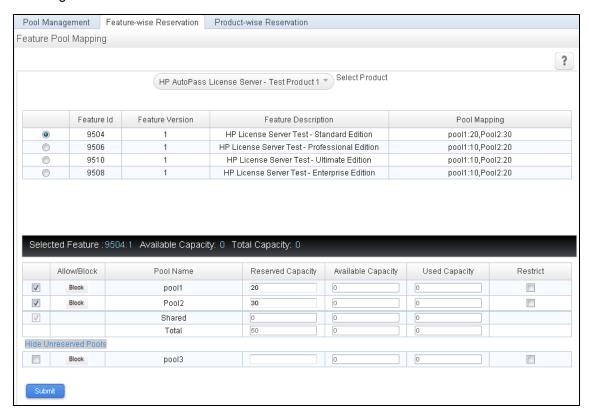
User interface elements are described below:

UI Element	Description
Pool name and description	The name of the user pool whose reservations are currently displayed.
Product	The products for which this particular user group has license capacity reserved.
Feature	The features for which this particular user pool has license capacity reserved.

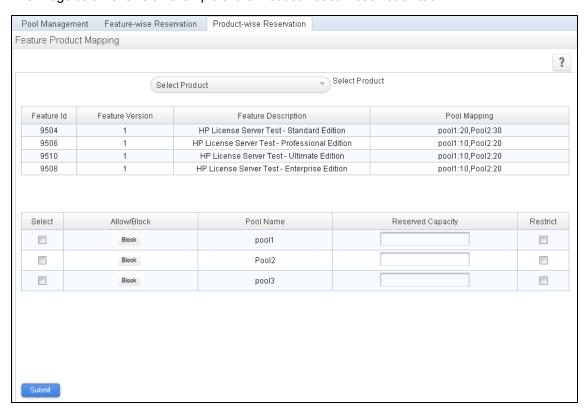
Featured-Based/Product-Based Reservation Tab

This tab enables you to assign license capacity for product features.

The image below shows the Feature-Based Reservation tab.



The image below shows an example of the Product-Based Reservation tab.



To access	In the Reservation Management pane, select the Feature-Based Reservation or the Product-Based Reservation tab.
Important information	You must reserve capacity for a product before reserving capacity for its features.
Relevant tasks	"How to Manage Client User Access" on page 91
See also	"Feature-Based vs. Product Based Reservation" on page 88
	"Restricting or Blocking User Pools" on page 89
	"License Reservation Priority" on page 88
	"License Usage by User Pools" on page 86

User interface elements are described below:

Feature/Product List Table

UI Element	Description
Feature ID	The feature's unique identification.
Feature Version	The feature's version number.
Feature Description	A textual description of the feature.
Pool Mapping	A listing of the user pools and corresponding capacities mapped to these user pools. For example, for a <i>FeatureA</i> , the pool mapping is displayed as <i>Pool1:20</i> , <i>Pool2:15</i> , and so on.
	If a pool is restricted or blocked, the pool name is displayed with an (r) next to the pool name.

User Pool Feature/Product Reservation Details Area

UI Element	Description
<feature details=""></feature>	The details for a particular feature. These details include:
	Selected Feature: The feature name
	Available Capacity: The capacity currently available for checkout
	Total Capacity: The total installed capacity
	Note: The reserved capacity for a user pool can be greater than the available capacity or total capacity. However, check out requests that exceed the available capacity are declined.
Block / Allow	Disables or enables the ability of a user pool to perform check out requests for a specific feature.
Reserved Capacity	The license capacity reserved for members of this pool. All check out requests less than the reserved capacity are fulfilled automatically.
	If a check out request exceeds the reserved capacity, the client user can combine the available capacity in this pool with the <i>Shared</i> pool to complete a check out request.
Available Capacity	The capacity currently available for a check out request.
Used Capacity	The capacity currently checked out.
Restrict	When this check box is selected, the client users in the selected user pool can fulfill only those check out requests which do not exceed the available capacity for the feature.
Hide/Show Unreserved Pools	Hides or shows user pools that are unreserved for the selected feature.

Client User Management - Frequently Asked Questions

The following are frequently asked questions about managing client users and user pools in the License Server.

Can a client user access product or feature license capacity without being assigned to a user pool?

No. Client users are added as part of a user group following the creation of a user pool. There is no way to independently add a user without first placing the user in a user pool.

When adding a client user, do I have to enter all four attributes for a client user?

No. However, it is recommended to do so. If the user tries to check out a license from the License Server later with a User name, IP address, Host ID, or Client ID that is not an associated attribute for the user's pool, the check out request is denied.

Can a user's license request be fulfilled if the user pool in which the user is a member does not have enough available capacity?

Yes. If there is not enough available capacity, the client user can fulfill the request by taking the available capacity from the user pool and combining it with available capacity in the *Shared* pool.

Can I reserve license capacity for multiple features or products at a time?

No. You can reserve capacity only for a single feature or single product at a time. However, you can reserve licenses for a single feature or product for multiple user groups simultaneously.

How does the License Server select a pool to fulfill a license request if a client user is part of multiple user pools?

The License Server selects the user pool from which to check out the license based upon the priority order of the user pools for a feature or product.

If there are multiple pools with reserved capacity for a feature, and a lower priority pool makes the first check out request, is the request fulfilled?

Yes. License check out requests are fulfilled on a first-come, first-serve basis.

If I want to limit a client user's ability to check out licenses, how to I do this?

You have two options for restricting check out:

- You can restrict the user pool, which limits check out requests to only the reserved capacity in the pool. For details, see "Restrict a user pool" on page 94.
- You can block a user pool, which prevents all check out requests. For details, see "Block a user pool" on page 93.

Can a license be checked in by a client user in a blocked pool?

Yes.

How do I check from which pool I check out licenses?

In the License Usage pane, select the Feature ID for which you have checked out a license. The Pool field displays the pool name to which the license belongs.

Client Users Management - Troubleshooting and Limitations

The following are frequently asked questions about problems encountered while managing client users and user pools in the License Server.

Why is a client user unable to check out licenses?

A client user cannot check out licenses for one of the following reasons:

- The client belongs to a user pool that is blocked. For details, see "Restricting or Blocking User Pools" on page 89.
- The client user belongs to a restricted user pool and the requested capacity is not available for that pool.
- The request capacity is not available for that feature.

Chapter 10: Remote Commuter License Management

This chapter includes:

Concepts

- "Commuter Licensing Overview" on the next page
- "Commuter License Check In and Check Out" on the next page
- "Recovering Commuter Licenses" on page 107

Tasks

• "How to Perform Remote Commuter License Operations" on page 108

Reference

• "Check In/Check Out Tab (Remote Commuter Pane)" on page 110

"Remote Commuter Licensing Management - Frequently Asked Questions" on page 112

"Remote Commuter Licensing Management - Troubleshooting and Limitations" on page 113

Concepts

Commuter Licensing - Overview

At times, client users need to use a licensed product without a connection to the License Server to check out a license. Normally, the lack of a connection to the License Server would prevent the user from checking out a license and thereby prevent them using the product. However, users without a connection can use a **commuter license**¹ to use a product without a connection to the License Server. For example, client users that travel frequently with limited or no access to the License Server benefit from commuter licenses.

A commuter license is checked out from the License Server and is later installed on the client user's computer (when there is no active connection to the License Server). The commuter license enables the product to open and run without a connection to the License Server. After the client user is finished with the license, the user checks it in to the License Server.

Note: The user only needs to be connected to the License Server during license check in and check out.

Once a commuter license is checked out from a product or feature's capacity, the capacity remains checked out until the license is checked in or expires.

Unlike live concurrent licenses, you cannot revoke a commuter license.

Each product or feature can enable or prevent commuter licenses. This can be done by the product itself through the license key or you can set the settings for commuter license usage in the Feature Report for a particular feature. For details on setting commuter licenses in the license key file, see individual product documentation.

Commuter License Check In and Check Out

In order to receive a commuter license, you or the client user must check out a commuter license. Commuter license check out is done in one of two ways:

- Direct: The client user connects directly to the License Server and checks out the license. For
 details on performing this type of check out, see the individual product documentation.
- Remote: An License Server user checks out the license and sends it to the client user.

Only users with administrator privileges can check out commuter licenses for all products and features. Product Admin users can check out licenses for the associated products in the User Groups tab (User Management pane).

Before checking out a remote commuter license, each client user must generate a file in the client system. This file contains the license requirements for the client's program and the client computer details. For details on generating this input file, see the individual product documentation.

¹A license that allows a user to use a product without an active connection to the License Server.

To check in a remote commuter license, the user also needs to generate an file in the client computer. This output file contains the license details and the client computer's information. When checking in the license, this enables the License Server to recognize the commuter license.

All License Server users can check in a remote commuter license.

Recovering Commuter Licenses

On occasion, a commuter license is lost before it is used by a client user. This happens when:

- A mail server goes down when sending the license key via email
- The downloaded license key file is corrupt
- The License Server user navigates to a different page in the License Server after checking out a license but before downloading the license key.

Using the Feature Report page, you can download the license file again and use it in a client user's program.

Tasks

How to Perform Remote Commuter License Operations

This task describes the processes necessary to manage commuter licensing operations.

This task includes the following steps:

- "Enable commuter licensing " below
- "Modify commuter licensing settings" below
- · "Check out a commuter license" on the next page
- "Check in a commuter license" on the next page
- "Recover a commuter license" on the next page

Enable commuter licensing

1. In the License Usage pane, select the feature for which you want to enable commuter licensing.

Note: A feature that allows you to enable commuter licensing is displayed with a cleared, enabled check box next to the Feature ID.

2. Click Manage Commuter.

The License Server displays a message confirming the commuter license enabling and the feature is displayed with a checked, enabled check box.

Modify commuter licensing settings

- 1. In the License Usage pane, click the **Feature ID: Version** link for the feature for which you want to modify commuter licensing settings. The Feature Report page for the feature opens.
- In the Feature Report page, in the Commuter Checkout Settings section, click Edit.
- 3. Enter the **Maximum number of days allowed** for a commuter license checkout and the **Maximum capacity allowed** for a check out operation.
- 4. Click Save.

The Feature Report page displays the modified values for the commuter license settings.

Note: If you do not enter a value for the Maximum capacity allowed, all the available capacity is set as the maximum capacity for check out.

Check out a commuter license

- 1. In the Check Out tab (Remote Commuter pane), click the **Browse** button and navigate to the file generated in the client computer for commuter license check out.
- 2. Click Check Out.
- In the Check Out page, select the features to check out and click Download Link.

The license key file is downloaded and is available for use by a client user.

Note: If you want to exclude certain features from a particular commuter check out, select the features in the Check Out page and click **Discard**.

For details on installing the license in a client computer, see the individual product documentation.

Check in a commuter license

- 1. In the Check In tab (Remote Commuter pane), click the **Browse** button and navigate to the file generated in the client computer for the commuter license (as described in "Commuter License Check In and Check Out" on page 106).
- 2. Click Check In.

The license is checked into the License Server and the capacity is added to the available capacity displayed in the License Usage pane.

Recover a commuter license

- 1. In the License Usage pane, select the feature for which you want to recover a commuter license and click the **Feature ID: Version** link. The Feature Report for that page opens.
- 2. In the Feature Report page, click the Remote/Commuter link in the license details table.

Note: You can download a commuter license only if it is not checked in.

3. Save the file to a convenient location.

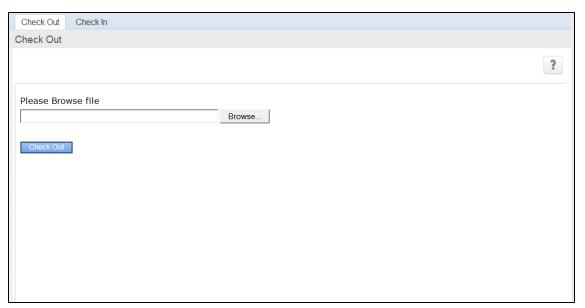
Note: The commuter license capacity listed as checked out does not change after downloading a commuter license again.

Reference

Check In/Check Out Tab (Remote Commuter Pane)

These tabs enable you to select the features for a commuter license check out or check in.

The image below shows an example of the Check Out pane.



Remote Commuter pane > Check Out/Check In tab	
In order to check out a commuter license for the feature, a feature must have commuter licensing enabled, as displayed in the License Usage pane or the Feature Report page. For details, see "License Usage Pane" and "Feature Report Page (License Usage Pane)".	
"How to Perform Remote Commuter License Operations" on page 108	
 "Commuter Licensing - Overview" on page 106 "Commuter License Check In and Check Out" on page 106 "Recovering Commuter Licenses" on page 107 	

UI Element	Description
<file path=""></file>	The path to the output file generated in the client user's system for commuter license check out/check in.
Browse	Opens a dialog to enable you to find the output file for commuter license check out/check in.
Check Out Check In	Opens the Check Out/Check In page, in which you select the features for commuter license check in or check out.

Remote Commuter Licensing Management - Frequently Asked Questions

How can I tell if a product or feature is enabled for a commuter license check out?

In the License Usage pane, a product or feature is shown as enabled for commuter license check out in the following ways:

- It has a selected, disabled check box next to the Feature ID.
- It has a selected, enabled check box next to the Feature ID.

If a feature allows commuter check out but the commuter check out is not yet enabled, the check box is displayed as a cleared, enabled check box. Select the feature's checkbox and click **Manage Commuter** to enable a commuter license check out.

Who can check out a commuter license?

Only users with *administrator* or *Product Admin* access privileges can check out commuter licenses. Product administrators are limited to check out of commuter licenses for the associated products in their user groups.

Who can check in a commuter license?

All License Server users can check in a commuter license.

Why is there an option to download a commuter license?

This option is used to recover a commuter license that is lost. Instead of performing license cleanup and checking out the licenses again to recover these licenses, a License Server user can download the licenses again using the Feature Report page for the feature.

Remote Commuter Licensing Management - Troubleshooting and Limitations

The "Product is not configured with this License Server" error message is displayed when checking out a commuter license. Why?

This error message indicates that a product is not configured in the License Server. Check out a live or commuter license to configure a product and then check out a remote commuter license.



