

User Guide - Handling Licensing in Configura[®]

- For License Buyers

Note, this version will change as the License server develops.

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Handling licensing in Configura

In this document you can read how you, as a License Buyer, handle licenses in Configura.

The Concept

All end users need a license to be able to run Configura. With the licensing system in Configura, companies will have one person that buy and manage end user licenses. A License buyer orders, administers, and pays for licenses.

You handle licenses from the **License Buyer** user interface that are downloaded from a link sent to you by Configura.

If you are going to hold the role of License Buyer, please contact Configura. We will send you a username and password for the **License Buyer** user interface.

Definitions of the Different Roles

In this document the following different roles are mentioned:

- **End user:** An end user is a person that uses Configura in their daily work.
- **License buyer (you):** The License Buyer is the owner of one or more licenses. The License buyer can pre-order multiple licenses (unallocated licenses) and distribute the licenses to specific end users. He or she can also order or deny license requests from end users.

Contacting Configura

If problems occur with Configura, please contact your project manager at Configura.

The License Buyer user interface

As a License buyer, you administer licenses from the **License Buyer** interface. You download the interface from a link sent to you by Configura. To access the **License Buyer** interface, click the **CET Buyer** icon on your desktop or open the program from the **Start** menu (see the figure below).



The **License Buyer** interface is divided into five sections; **Home**, **My Licenses**, **My Users**, **Extensions** and **Requests**. Here you can view information about your users and their licenses as well as buy and renew licenses.



On the next page you will find more detailed descriptions about the sections in the **License Buyer**.

Home

After logging into the **License Buyer** interface you enter to the **Home** section.



In the **Home** section you find the following information:

1. Click the **Home** button to access the **Home** section in the **License Buyer**.
2. Information about what you can do in the **License Buyer**.
3. Please ignore this option for now.
4. Please ignore this option for now. To order or renew licenses, please contact the License Administrator at Configura.
5. Please ignore this option for now. To order or renew licenses, please contact the License Administrator at Configura.

My Licenses

In the **My Licenses** section in the **License Buyer** you can view all licenses that your users have.



In the **My Licenses** section you find the following options:

1. Click the **My Licenses** button to access the **My Licenses** section in the **License Buyer**.
2. In the field to the left you find information about all licenses that the users have.
3. If you select a license in the left field, you find information about that actual license in right field.
4. Click the **Sort** button to sort the licenses in the left field.
5. Click the **Refresh** button to update the information in the **My Licenses** tab.
6. Click the **Expand** button to expand the tree view in the **My Licenses** field.
7. Please ignore this option for now. To order or renew licenses, please contact the License Administrator at Configura.
8. Please ignore this option for now. To order or renew licenses, please contact the License Administrator at Configura.

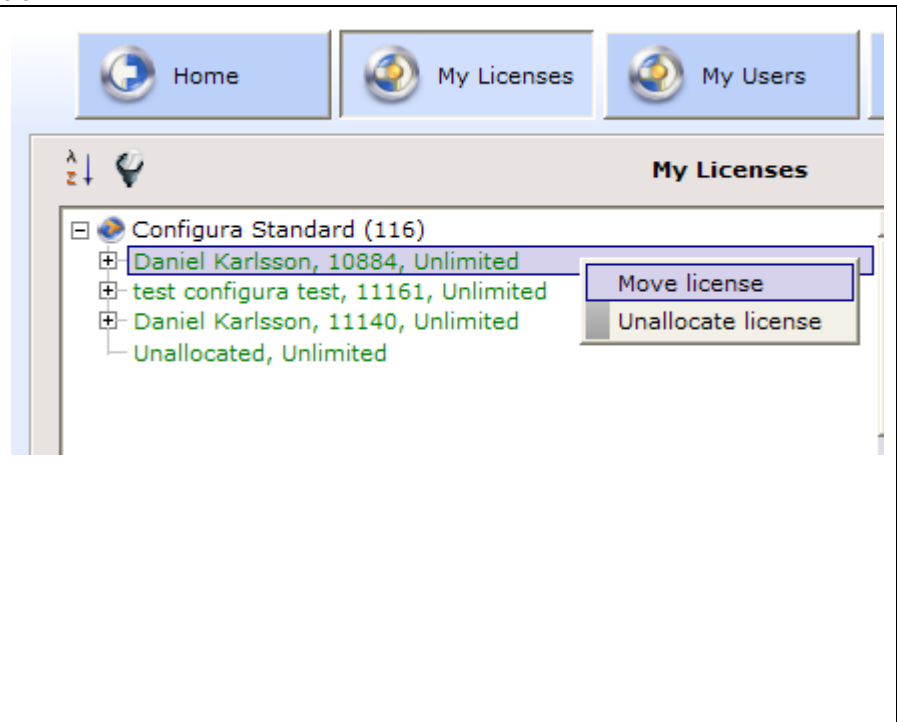
Move a license to another computer

There can be situations when you wish to move a license to another computer, for example if you want to move a license between two users, or if a user is going to change to another computer.

To move a license, follow the steps below:

1. Select the license that you wish to move in the **My Licenses** field.
2. Right click the license and select **Move license** from the popup menu that appears. The **Move license** dialog box appears.
3. In the drop down menu, select the computer that you wish to move the license to.
4. Click the **Move license** button.
5. The license is now moved.

In the drop down menu you see the user's account number and the name of the computer.



Unallocate_a license

There can be situations when you wish to unallocated a license. This means that you disconnect a license from a special user. For example, if a user is going to quit and you still wish to keep his/her license but you do not know who to give it to. You will later be able to allocate the license to another user.

Right click the user's name in the **My Licenses** field and select the **Unallocate license** option from the popup menu that appears

My Users

In the **My Users** section you can view all users that you have registered as *your* users.



In the **My Users** section you find the following options:

1. Click the **My Users** button to access the **My Users** section in the **License Buyer**.
2. In the **User Accounts** field you find information about your users. Expand the tree view to see detailed information about a user.
3. Click the **Sort** button to sort the users in the **User accounts** field to the left. You can sort the licenses in four different ways.
4. Click the **Refresh** icon to update the information in the **User accounts** field.
5. Click the **Expand** button to expand the tree view in the **User accounts** field.
6. See detailed description below.

You find the following options in the lower part of the **My Users** tab:

Search: Click the **Search** button to search for a user.

Add: Click the **Add** button to add a user account. Note, the user needs to be registered. Enter the user's e-mail address and click the **Search** button.

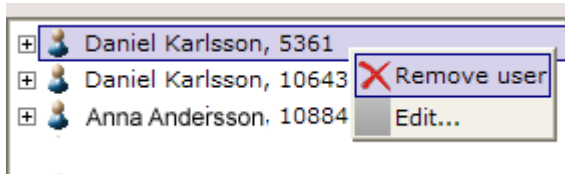
Edit: Click the **Edit** button to edit a user's contact information. The buttons activates when a user is selected in the **User Accounts** field.

Groups: Click the **Groups** button to create new groups where you can organise your users. You can then select a user in the **User Account** field and then move the user to a specific group. Existing groups are visible on the **My Licenses** tab and in the **User Account** field on the **My Users** tab.

Remove a User

To remove a user, follow the steps below:

1. Right click the user in the **User Accounts** field in the **My Users** section.
2. Select **Remove user** in the popup menu that appears (see figure below). The **Remove user** dialog box appears. Click the **Remove user** button.



Note: You still have to remove the license that the user has. You do this on the **My Licenses** tab. It doesn't matter if you remove the user or the license first.

To remove a license, go to the My Licenses tab and right click the user whose license you wish to remove.

You now have different options:

- **Cancel:** Please ignore this option for now. To cancel a license, please contact the License administrator at Configura.
- **Unallocate:** If you wish to keep the license, but do not know which user to move the license to. You will be able to allocate the licenses to other users later.
- **Move:** If you know who to move the license to. Click this button to specify which user to move the license to.
- **Do nothing:** The user can keep using the licenses until the license expire.

Extensions

In the **Extensions** section in the **License Buyer** you can set different rules for an Extension. This means that you can decide whom of your users that are allowed to order a license.



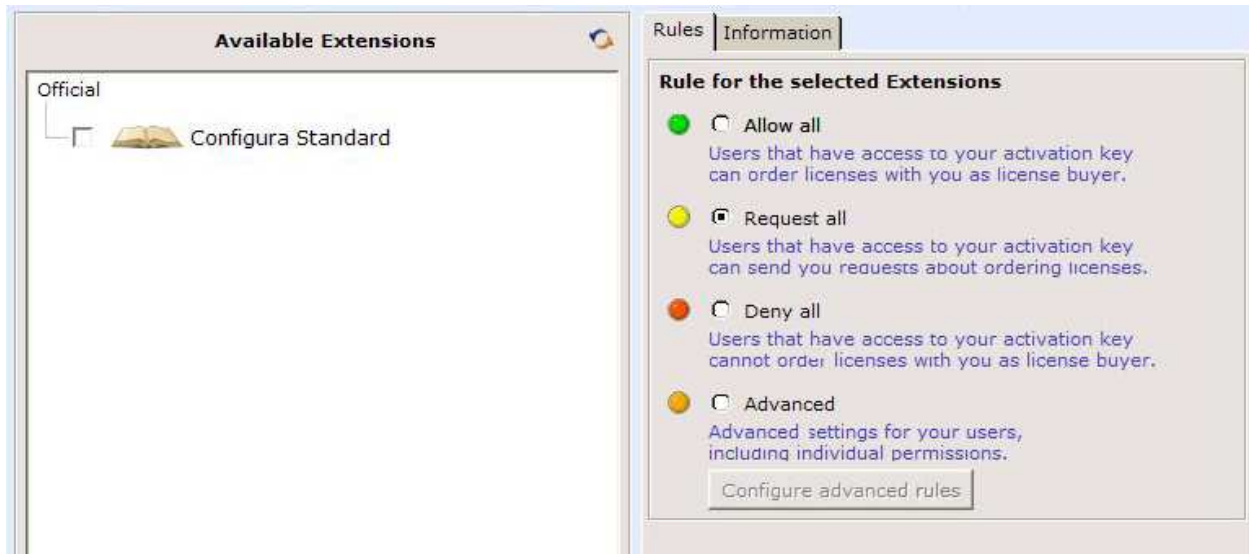
In the **Extensions** section you find the following information:

1. Click the **Extensions** button to access the **Extensions** section in the **License Buyer**.
2. In the **Available Extensions** field to the left you see a view with all available Extensions which your users can have licenses for.
3. You can set different rules for an Extension. This means that you can decide how to treat a license order from a user. When a user register for the first time, an order is placed automatically. Read more on the next page how to set a rule for an Extension.
4. Click the **Information** tab to receive more information about the selected Extension.
5. Please ignore these options for now. To order or renew licenses, please contact the License Administrator at Configura.

Read more on the next page how to set a rule for an Extension.

Set a rule for an Extension

To set a rule for a specific Extension you select the actual Extension in the **Available Extensions** field to the left and then select one of the options in the field to the right.

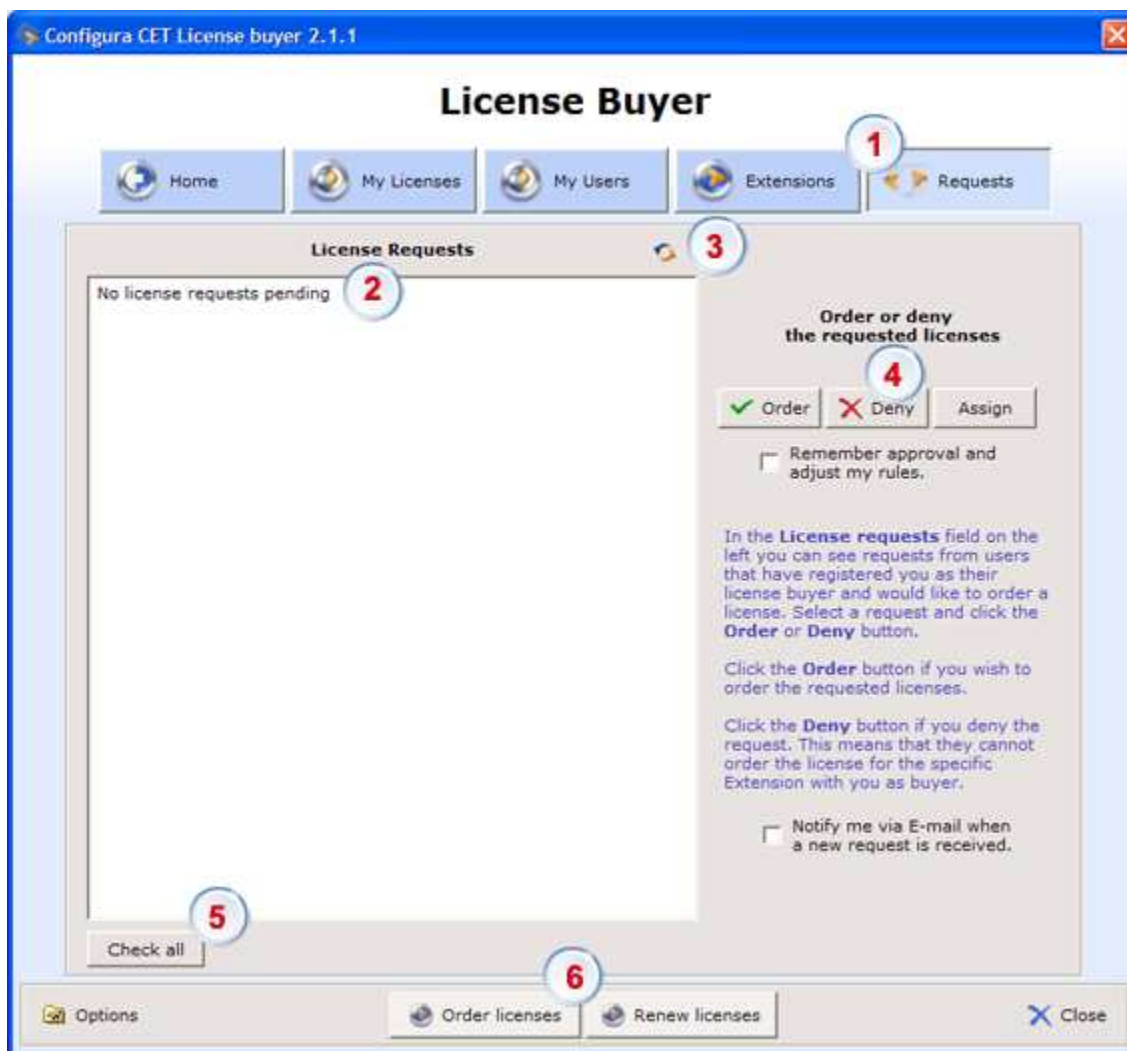


You have the following options:

- **Allow all:** Select the **Allow all** option if you would like to allow all users to be able to order (register=order) the selected Extension without requiring your approval. When the user has registered, he/she will receive an unallocated license. If there is no unallocated license, a request will be sent to you.
- **Request all:** Select the **Request all** option if you require that each order (register = order) need your approval. Once a request has your approval the user will be assigned an unallocated license.
- **Deny all:** Select the **Deny all** option if you wish to deny all users to ordering licenses.
- **Advanced:** Select this option and click the **Configure advanced rules** button to set detailed rules about whom should be able to order a license or not (register = order). **Note:** This option will only be visible if you select the **Show advanced rules** options in the **Settings** dialog.

Requests

In the **Request** section in the **License Buyer** you can allow or deny license-ordering requests from users (i.e. if a user has ordered a license that you have assigned the rule **Request all** in the **Extension** section).



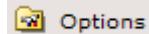
In the **Requests** section you find the following options:

1. Click the **Requests** button to access the **Requests** section in the **License Buyer**.
2. In the **License Requests** field you find information about requests that users have sent when ordering a license for an Extension.
3. Click **Refresh** if you wish to update the information in the **License Requests** field.
4. Decide how you wish to process a request:
 - **Order**: Please ignore this option for now. To order or renew licenses, please contact the license administrator at Configura.
 - **Deny**: Click the **Deny** button to deny a user a license.
 - **Assign**: Click Assign to assign an unallocated license to the user.
5. Click the **Check all** button if you wish to select all requests in the **License Requests** field.
6. Please ignore these options for now. If you wish to order or renew licenses, please contact Configura.

Note, if you select the checkbox **Notify me via E-mail....** if you wish to receive an e-mail each time you get a request.

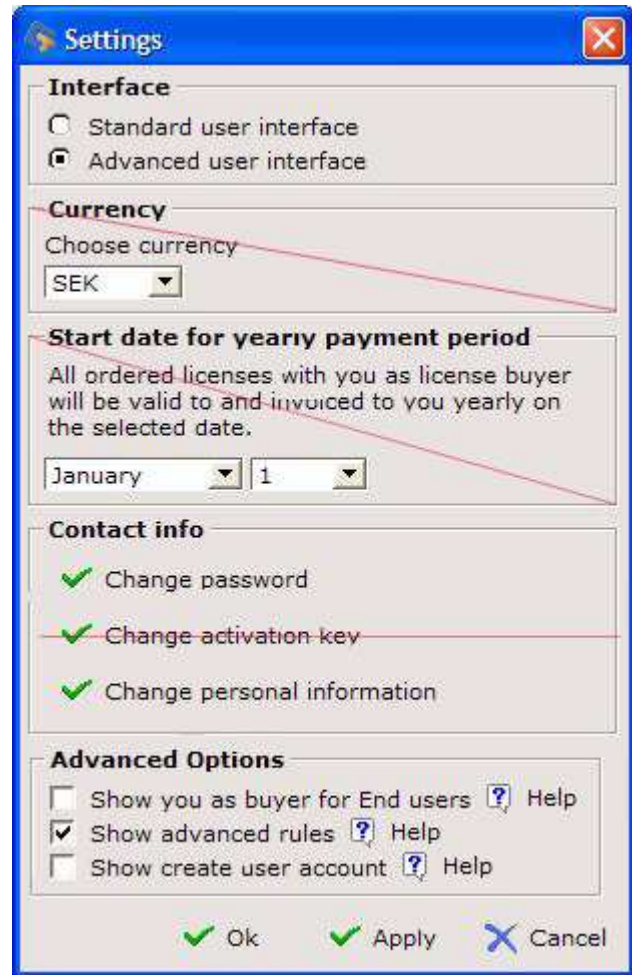
Change settings

You can change your settings for the **License Buyer** user interface in the **Settings** dialog. Just click the **Options** button in the bottom left corner of the **License Buyer**.



You have the following options in the **Settings** dialog:

- **Standard user interface:** Standard user interface of the **Settings** dialogue.
- **Advanced user interface:** Advanced user interface of the **Settings** dialogue. By selecting this option you will get access to more options in the **License Buyer**.
- **Currency:** Please ignore this option for now.
- **Payment period:** Please ignore this option for now.
- **Change password:** Change your current password.
- **Change activation key:** Please ignore this option for now.
- **Change personal information:** Change you contact information.



Order or renew licenses for your users

If you wish to order or renew licenses for your users, please contact the License Administrator at Configura.

In the future, you will be able to order and renew licenses by yourself from the **License Buyer** interface.