

User Guide - Handling Extension Licensing in CET Designer

- For Supervisors of Extensions

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Handling Licensing in CET Designer

In this document you can read how you, as a supervisor, handle licenses in CET Designer.

The Concept

CET Designer is a platform upon which you can add different Extensions. These Extensions can either contain products from a particular manufacturer or include specific functionality that suits your specific needs (i.e. office accessories such as computers, printers and plants).

In most cases an Extension requires a license to run. With the licensing system in CET Designer dealerships can have one person or several people (i.e. one or more persons per office) that buy and manage end user licenses. Each License buyer orders, administers, and pays for licenses. Note, the end users can still order and pay for their own Extension licenses (i.e. they can be their own License buyer).

A supervisor is the manufacturer of the products that an Extension consists of. As the supervisor, you have the ability to approve or deny the purchase of licenses for an Extension that contains the manufacturer's products. So when ordering a license, both the License buyer and the supervisor has the ability to allow or deny the purchase of a specific license.

Definitions of the Different Roles

In this document the following different roles are mentioned:

- **End user:** An end user is a person that uses CET Designer and CET Extensions in their daily work.
- **License buyer:** The License Buyer is the owner of one or more licenses. The License buyer can pre-order multiple licenses and distribute the licenses to specific end users. He or she can also order or deny license requests from end users. It is possible for an end user to have the role as the License buyer. Usually a License buyer manages all licenses at a specific dealership.
- **Supervisor (you):** The supervisor is responsible for the usage of an Extension. The supervisor has the ability to approve or deny the purchase of licenses for an Extension.
- **Publisher:** A publisher is in charge of develop and release of a CETXT. The publisher is responsible for the content and he or she has to make sure that it follows the terms in the CETDL and CETPL. Normally the developer of an Extension is also the publisher of that Extension. A publisher has to be a CET Designer partner.

The purpose with this licensing system is to make it possible to control who is using an Extension. The License buyer, the supervisor, and the publisher have all possibilities to allow or deny users to use specific Extensions. The licensing system also makes it easier for the end users. He or she is no longer required to manage their licenses, if the licenses need to be renewed etc. everything can be handled by their License buyer.

Contacting CET Designer Help Desk

If problems should occur with CET Designer, do not hesitate to contact our [CET Designer Help Desk](#) by phone, e-mail or live chat.

Phone number: **1-877-CET-0808 (US)** or **+46 13 37 78 60 (Sweden)**

E-mail: support@cet-extensions.net

Live chat: available from our web page <http://www.configura.com/cet/support>

The First Thing You Need to do As a Supervisor

The first thing you need to do to be able to handle licenses is to download the **Extension Supervisor** interface. You download the **Extension Supervisor** interface from the **Download Extensions** section in the Extension Manager. To be able to download the interface you need to contact Configura.

After you have downloaded the **Extension Supervisor** interface, you access the interface by selecting the **CET Extension Supervisor** Extension in the **Extensions & Licenses** field, in the **Extensions Installed** section (in the Extension Manager), and then click the **Start** button (see Figure 1 below). You do this procedure every time you wish to access the **Extension Supervisor** interface.

When you click the **Start** button a sign in dialog box appears. Enter your E-mail address and password and click **Sign in**.

Note:

- To be a supervisor, Configura will contact you for registration.
- If you also have the role as License buyer you log into the **Extension Supervisor** interface with the same E-mail address and password as to the **License Buyer** interface.
- If you change password in the **License Buyer**, the password to the **Extension Supervisor** interface will change as well, and vice versa.
- If you are not a License buyer, you will receive a temporary password from Configura.

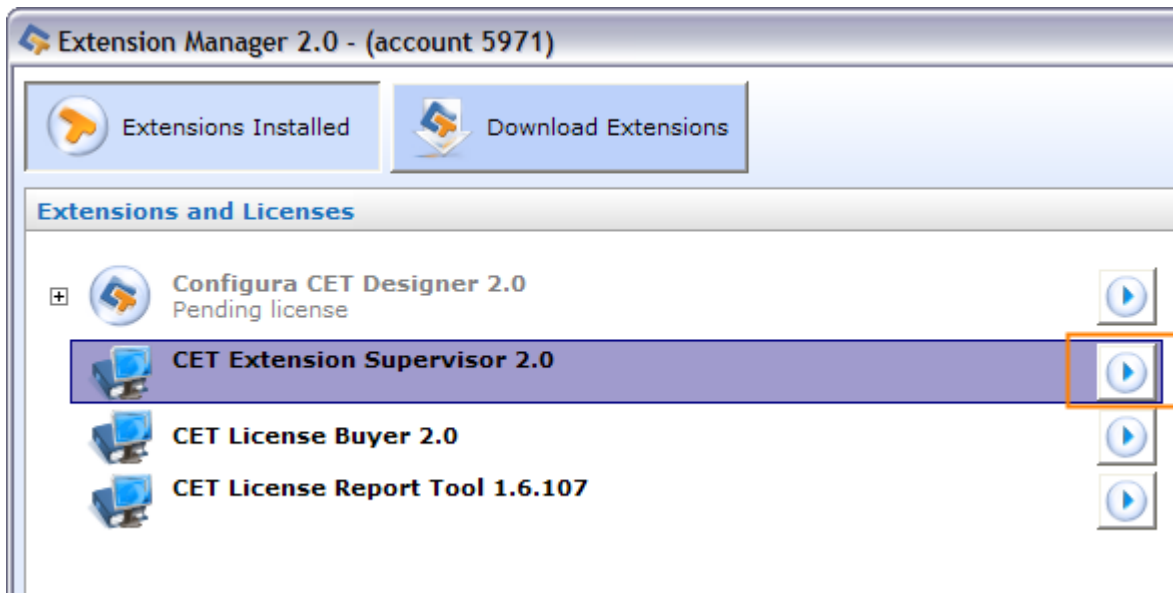


Figure 1 The My Extension section in the Extension Manager

The Supervisor Interface

The supervisor interface consists of three sections; **Home**, **Extensions**, and **Requests**. Below you will find detailed descriptions of the three different sections.

Home

In the **Home** section in the **Extension Supervisor** interface you find information about the interface as well as the **Sign out** button (see Figure 2).

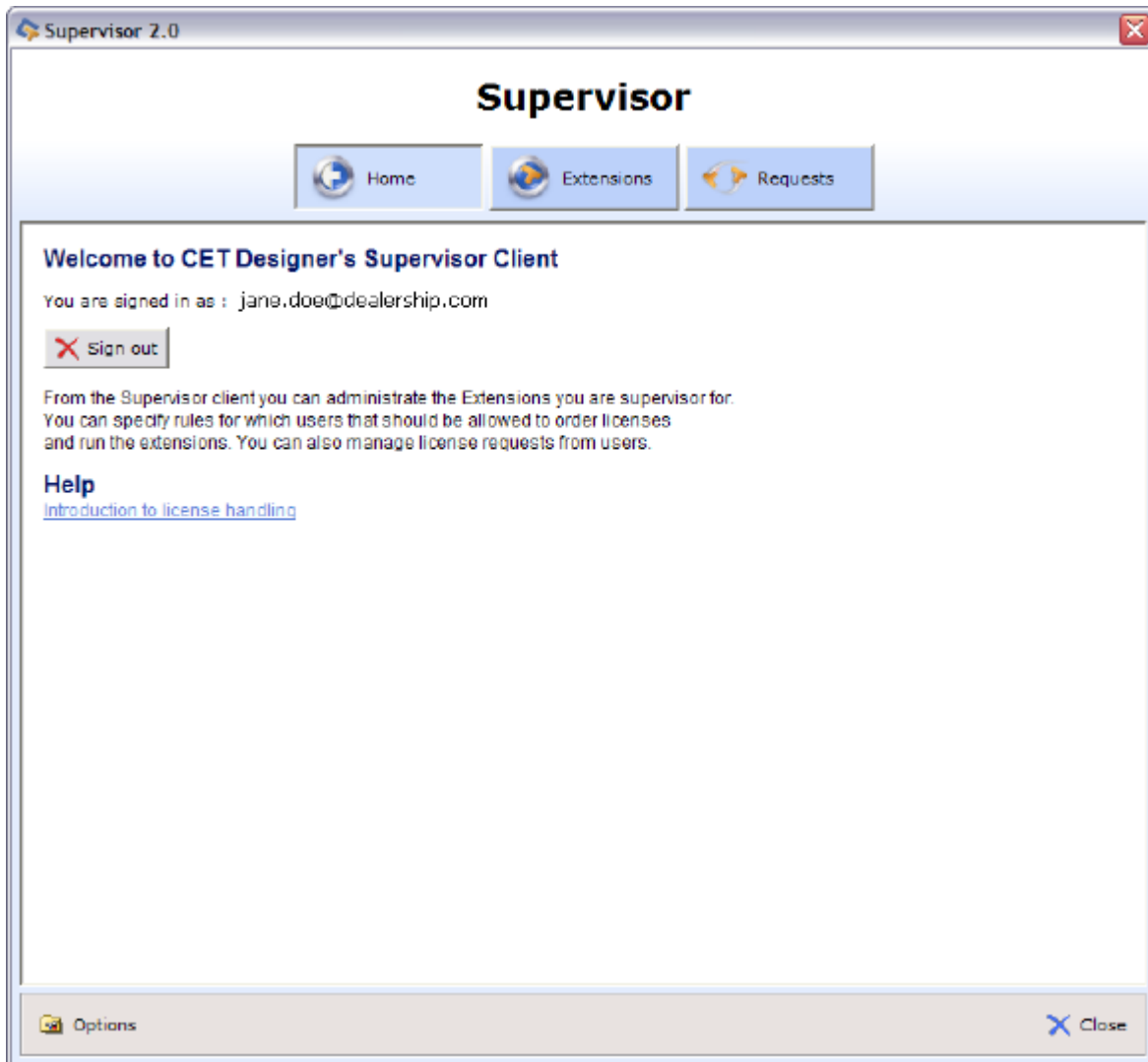


Figure 2 The Home section in the Extension Supervisor interface

Extensions

In the **Extensions** section you'll find all of the Extensions that you are the supervisor for, i.e. the Extensions for which you can specify which users are allowed or not to purchase a license (see Figure 3 below).

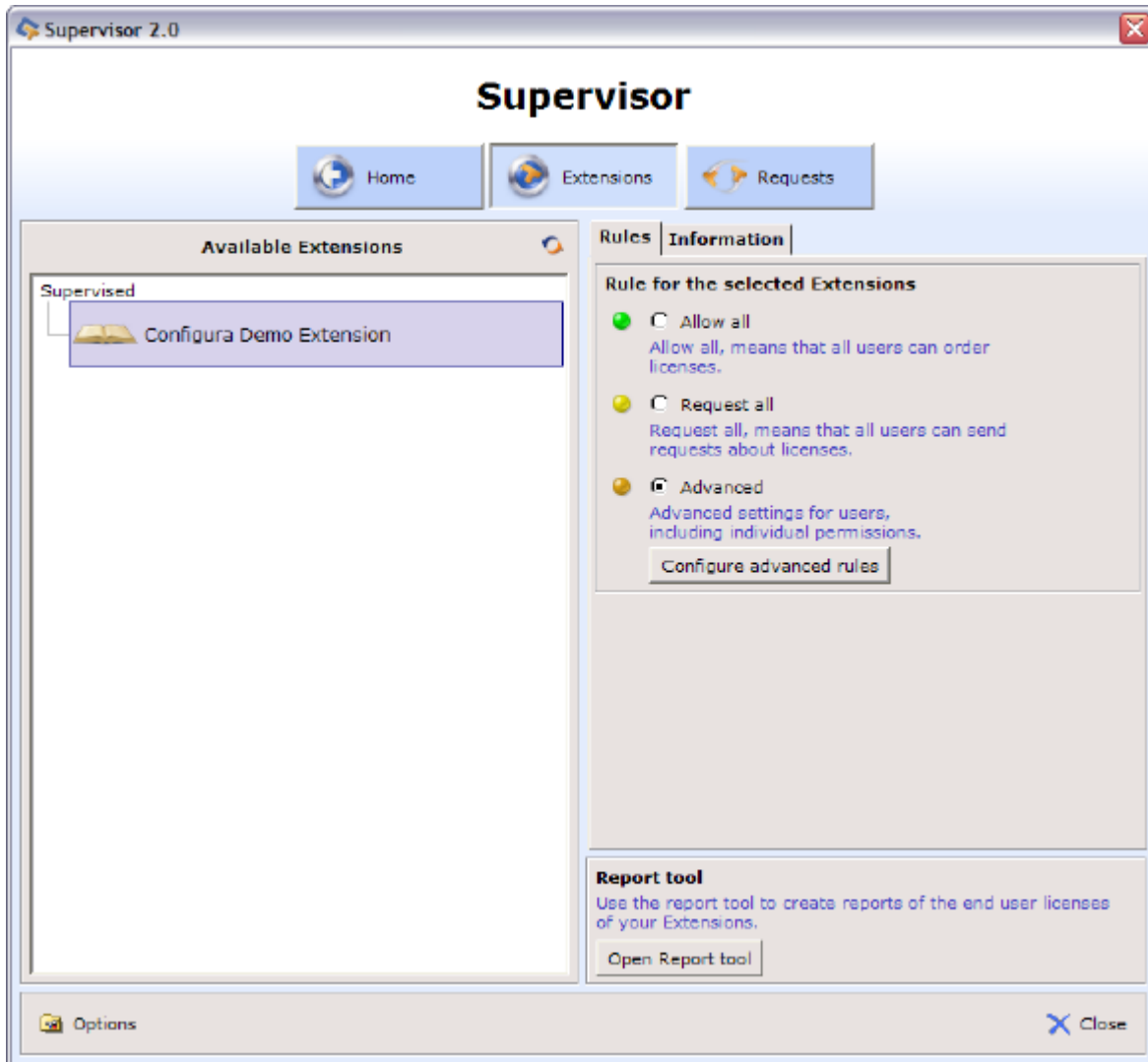


Figure 3 The Extensions section in the Extension Supervisor user interface.

To specify those users that will be allowed to purchase a specific license, select the extension in the **Available Extensions** field and then select one of the three options 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 licenses for the selected Extension without requiring your approval.
- **Request all:** Select the **Request all** option if you require that each individual license request for the selected Extension have your approval prior to completing the order process.
- **Advanced:** Select the **Advanced** option to make special rules allowing and denying potential License buyers. Read more about rules in the *Advanced Rules* section below.

Note: A buyer (i.e. the person who pays for the license) or a publisher (the publisher of an Extension) can also allow or deny users from ordering licenses for an Extension.

Advanced Rules

If you select the third option above, **Advanced**, you need to specify special rules for the Extension. Click the **Configure advanced rules** button to open the **Set advanced rules** dialog box.

The dialog box is divided into two tabs; **E-mail** and **Domain**. On the **E-mail** tab you can set rules for specific E-mail addresses, and on the **Domain** tab you can set rules for specific E-mail domains.

At the top of each tab you find a checkbox; **Use rules for E-mail**, and **Use rules for Domain**. Select one or both of these checkboxes to decide which rules that should be activated.

Note: If you select both of the checkboxes the **E-mail** option will be the dominating option. This means that if a user requests to orders a license, CET Designer will first check if you have allowed or denied the user's E-mail address. If you have not specified his or her E-mail address, CET Designer will check if you have allowed or denied the E-mail domain that the E-mail address belongs to.

Example: If you have allowed the E-mail address *user1@mail.com*, and at the same time denied the domain *mail.com*, the user with the E-mail address, *user1@mail.com*, will be allowed to order a license for this particular Extension (but not other users with E-mail addresses belonging to the same domain). There can be situations where you wish to allow one person at a company to order a license, but deny everyone else.

On the next page you can read about the different options in the **Set advanced rules** dialog box.

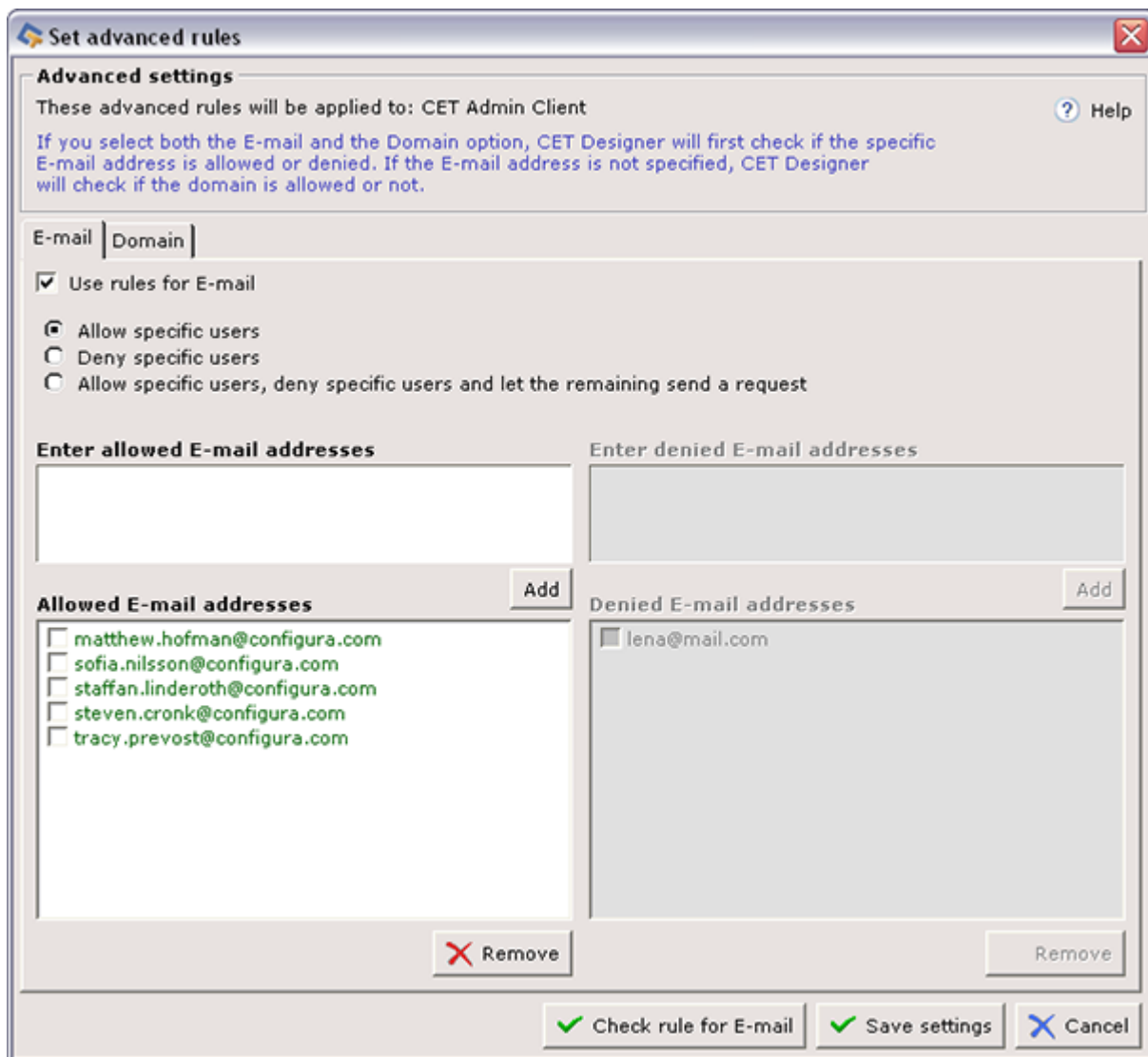
On the E-mail tab you can select one of three options:

- **Allow specific users**

By selecting this option you can specify those users who should be allowed to purchase a license for this specific Extension. Enter one or several E-mail addresses in the input field **Enter allowed E-mail addresses** and click **Add**. These E-mail addresses will now be visible in the input field below, **Allowed E-mail addresses**, where other E-mail addresses, that you have allowed earlier, are shown. (See Figure 4).

If you wish to remove an E-mail address from the **Allowed E-mail addresses** field, select the E-mail address and click **Remove**.

When you are done, click the **Save settings** button and close the dialog box.



The screenshot shows a dialog box titled "Set advanced rules" with a close button (X) in the top right corner. The main content area is titled "Advanced settings" and contains the following elements:

- A note: "These advanced rules will be applied to: CET Admin Client" with a "Help" icon.
- A sub-note: "If you select both the E-mail and the Domain option, CET Designer will first check if the specific E-mail address is allowed or denied. If the E-mail address is not specified, CET Designer will check if the domain is allowed or not."
- Two tabs: "E-mail" (selected) and "Domain".
- A checked checkbox: "Use rules for E-mail".
- Three radio button options:
 - Allow specific users
 - Deny specific users
 - Allow specific users, deny specific users and let the remaining send a request
- Two input fields: "Enter allowed E-mail addresses" and "Enter denied E-mail addresses".
- Below the input fields are two "Add" buttons.
- Below the "Add" buttons are two lists:
 - Allowed E-mail addresses**: A list with five entries, each with a checkbox:
 - matthew.hofman@configura.com
 - sofia.nilsson@configura.com
 - staffan.linderoth@configura.com
 - steven.cronk@configura.com
 - tracy.prevast@configura.com
 - Denied E-mail addresses**: A list with one entry:
 - lena@mail.com
- Below the lists are two "Remove" buttons.
- At the bottom are three buttons: "Check rule for E-mail" (with a green checkmark), "Save settings" (with a green checkmark), and "Cancel" (with a blue X).

Figure 4 The Allow specific users option

- **Deny specific users**

By selecting this option you can specify those users who are *not* allowed to purchase a license for that specific Extension. Enter one or several E-mail addresses in the input field **Enter denied E-mail addresses** and click **Add**. These E-mail addresses will now be visible in the input field **Denied E-mail addresses**, where other E-mail addresses, that you have denied earlier, are shown. (See Figure 5).

If you wish to remove an E-mail address from the **Denied E-mail addresses** field, select the E-mail address and click **Remove**.

When you are done, click the **Save settings** button and close the dialog box.

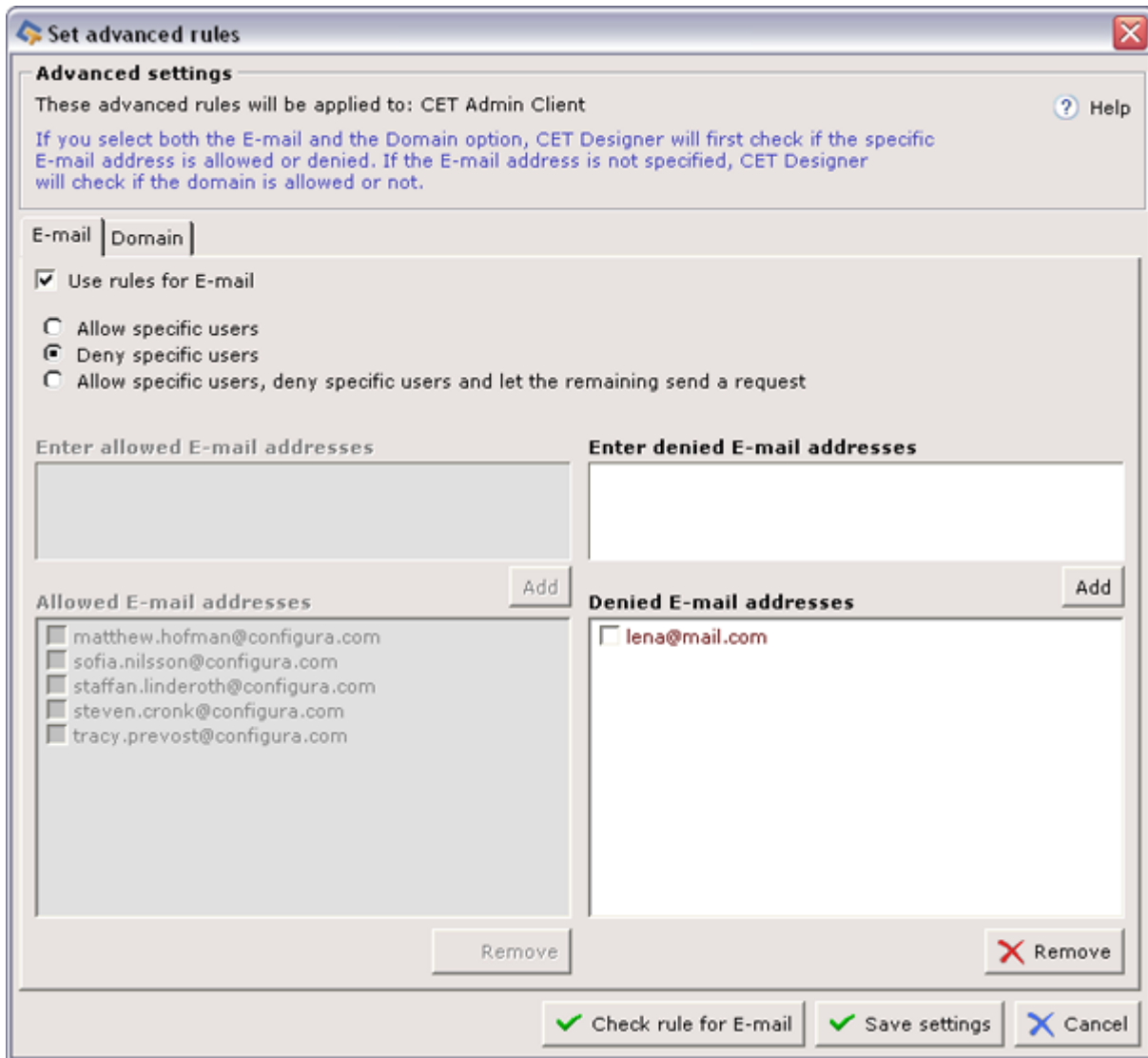


Figure 5 The Deny specific users option

- **Allow specific users, deny specific users, and let the remaining send a request**

By selecting this option you can specify those users who are allowed to order a license, and those who are *not* allowed to order a specific license. Enter the users' E-mail addresses that are allowed to order a license in the input field **Enter allowed E-mail addresses** and then click **Add**. Enter the users' E-mail addresses that are not allowed to order a license in the input field **Enter denied E-mail addresses** and then click **Add**. A user that has an unspecified E-mail address is required to send a request to be able to purchase a license. (See Figure 6).

If you wish to remove an E-mail address from the **Allowed E-mail addresses** field or the **Denied E-mail addresses** field, select the E-mail address and click **Remove**.

When you are done, click the **Save settings** button and close the dialog box.

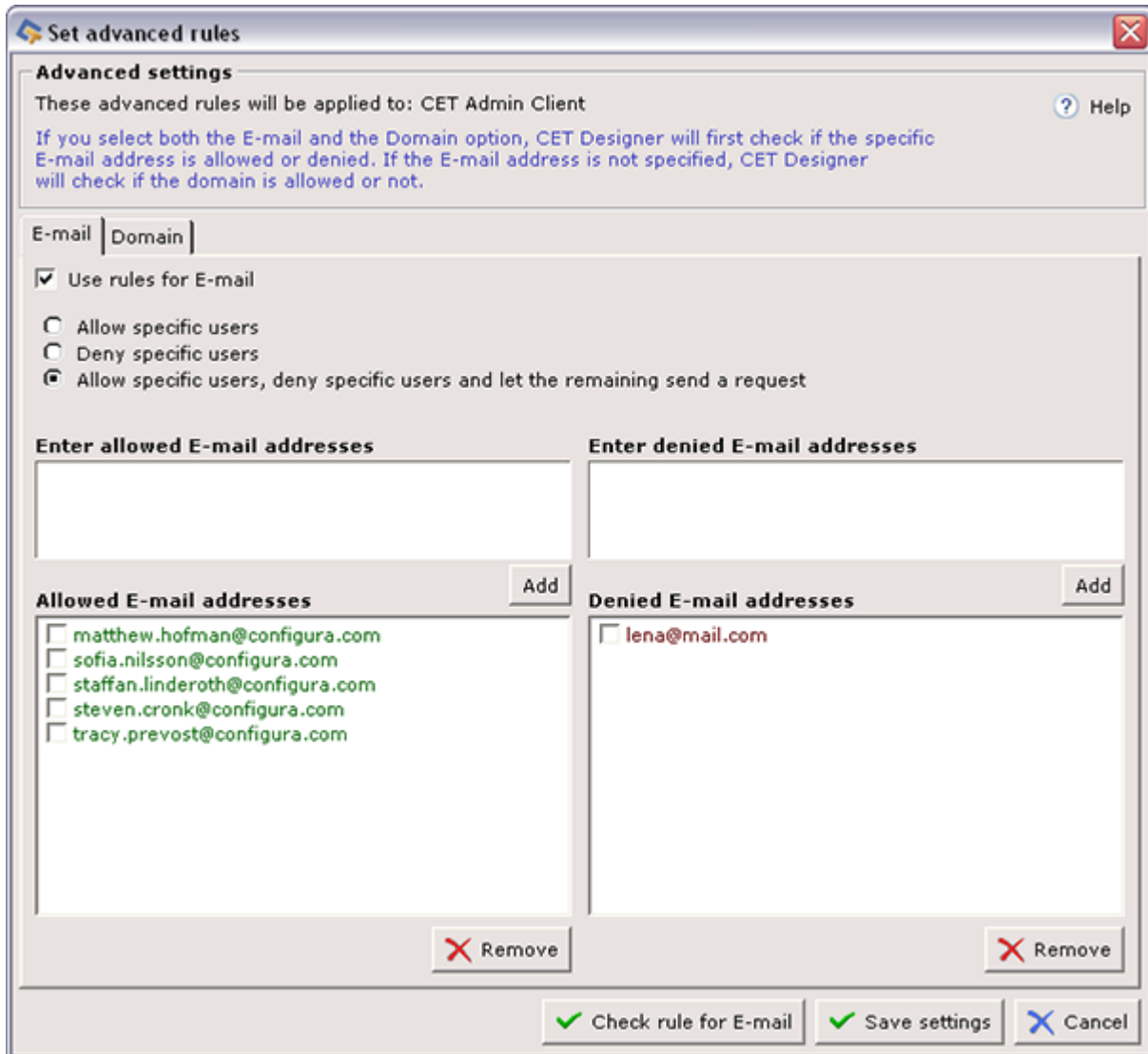


Figure 6 The option Allow specific users, deny specific users and let the remaining send a request.

Note:

You can only select one of these three options. If you select one option and define your rules and then change to another option, the next time you open the **Supervisor** interface the settings that you defined for the first option will have been lost.

Example: You select the **Allow specific E-mail addresses** option and then specify ten E-mail addresses that should be allowed to order a license. Then you change your mind and select the **Deny specific E-mail addresses** option and specify ten E-mail addresses that should not be allowed to order a license. Finally you click the **Save settings** button and close the dialog box. The next time you open the **Set advanced rules** dialog box the **Deny specific E-mail addresses** will be displayed and the settings you made in the **Allow specific E-mail addresses** will have been lost.

On the Domain tab you can select one of three different options:

- **Allow specific domains**

By selecting this option you can allow users with a specific domain address to purchase a license for the selected Extension. Enter one or several domains (e.g. configura.com) in the input field **Enter allowed domains** and click **Add**. These domains will now be visible in the **Allowed domains** input field, where other domains, that you have allowed earlier, are shown. (See Figure 7).

If you wish to remove a domain from the **Allowed domains** field, select the domain and click **Remove**.

When you are done, click the **Save settings** button and close the dialog box.

The screenshot shows a dialog box titled "Set advanced rules" with a close button in the top right corner. The main heading is "Advanced settings" with a help icon. Below this, it states "These advanced rules will be applied to: CET Admin Client". A blue informational text block explains that if both E-mail and Domain options are selected, CET Designer will first check the E-mail address, and if not specified, it will check the domain. There are two tabs: "E-mail" and "Domain", with "Domain" being the active tab. Under "Domain", the "Use rules for Domain" checkbox is checked. Three radio buttons are present: "Allow specific domains" (selected), "Deny specific domains", and "Allow specific domains, deny specific domains and let the remaining send a request". Below these are two input fields: "Enter allowed domains" and "Enter denied domains". The "Allowed domains" list contains "mail.com" with a checkbox and a green checkmark. The "Denied domains" list is empty and contains the text "No specified". At the bottom, there are buttons for "Remove" (with a red X icon), "Check rule for E-mail" (with a green checkmark), "Save settings" (with a green checkmark), and "Cancel" (with a blue X icon).

Figure 7 The Allow specific domains option.

- **Deny specific domains**

By selecting this option you can specify domains that are *not* allowed to purchase a license for that specific Extension. Enter one or several domains (e.g. configura.com) in the **Enter denied domains** input field and click **Add**. These domains will now be visible in the **Denied domains** input field, where other domains, that you have denied earlier, are shown. (See Figure 8).

If you wish to remove a domain from the **Denied domain** field, select the domain and click **Remove**.

When you are done, click the **Save settings** button and close the dialog box.

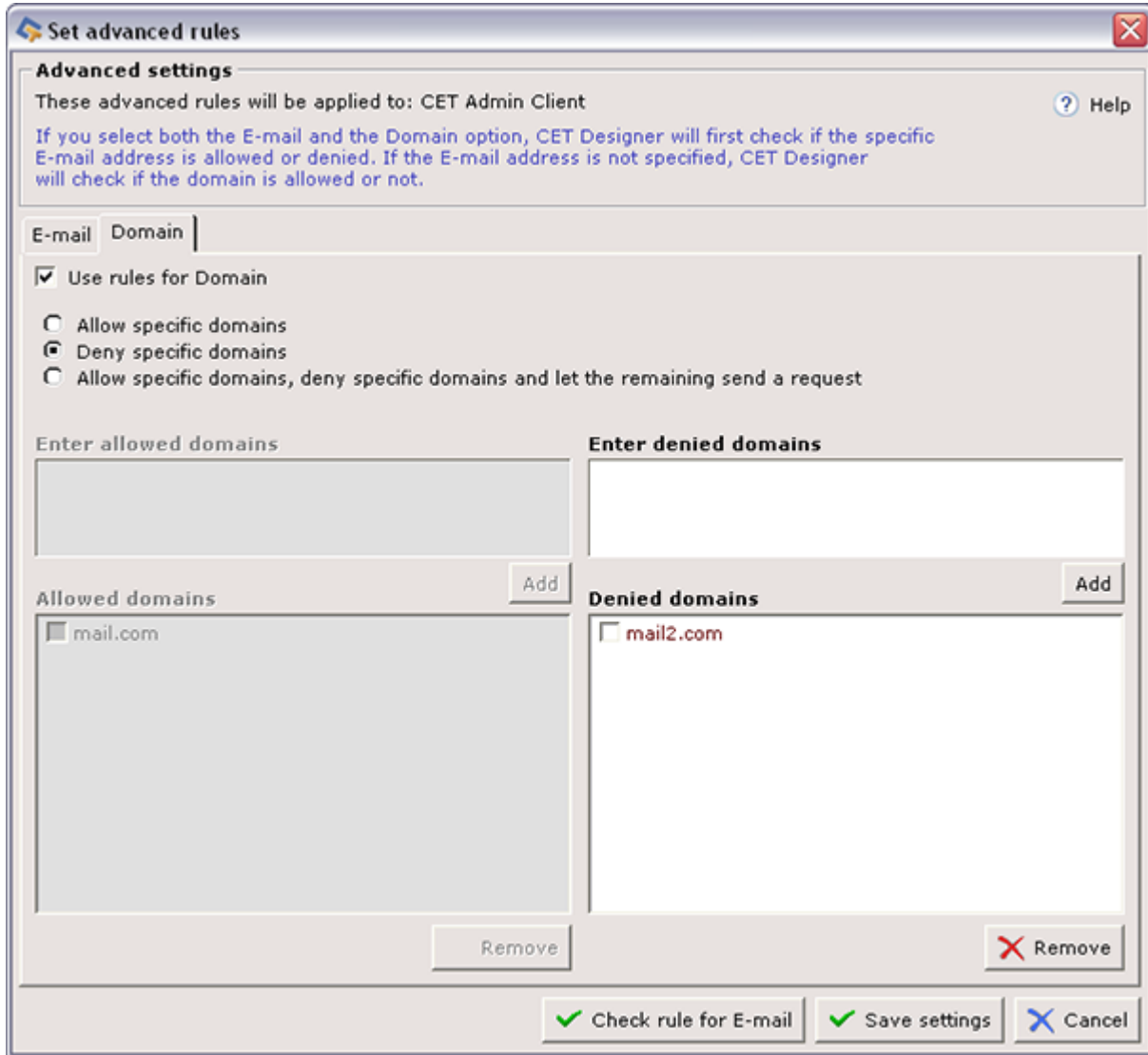


Figure 8 The Deny specific domains option

- **Allow specific domains, deny specific domains, and let the remaining send a request**

By selecting this option you can specify those users who are allowed to order a license, and those users who are *not* allowed to order a license. To allow users to order a specific license, enter the domains that the users' E-mail addresses belong to in the **Enter allowed domains** input field, then click **Add**. To deny users to order a license, enter the domains that the users' E-mail addresses belong to in the **Enter denied domains** input field, then click **Add**. A user that belongs to an unspecified domain will be required to send a request in order to purchase a license.

If you wish to remove a domain from the **Allowed domains** field or the **Denied domain** field, select the domain and click **Remove**.

When you are done, click the **Save settings** button and close the dialog box.

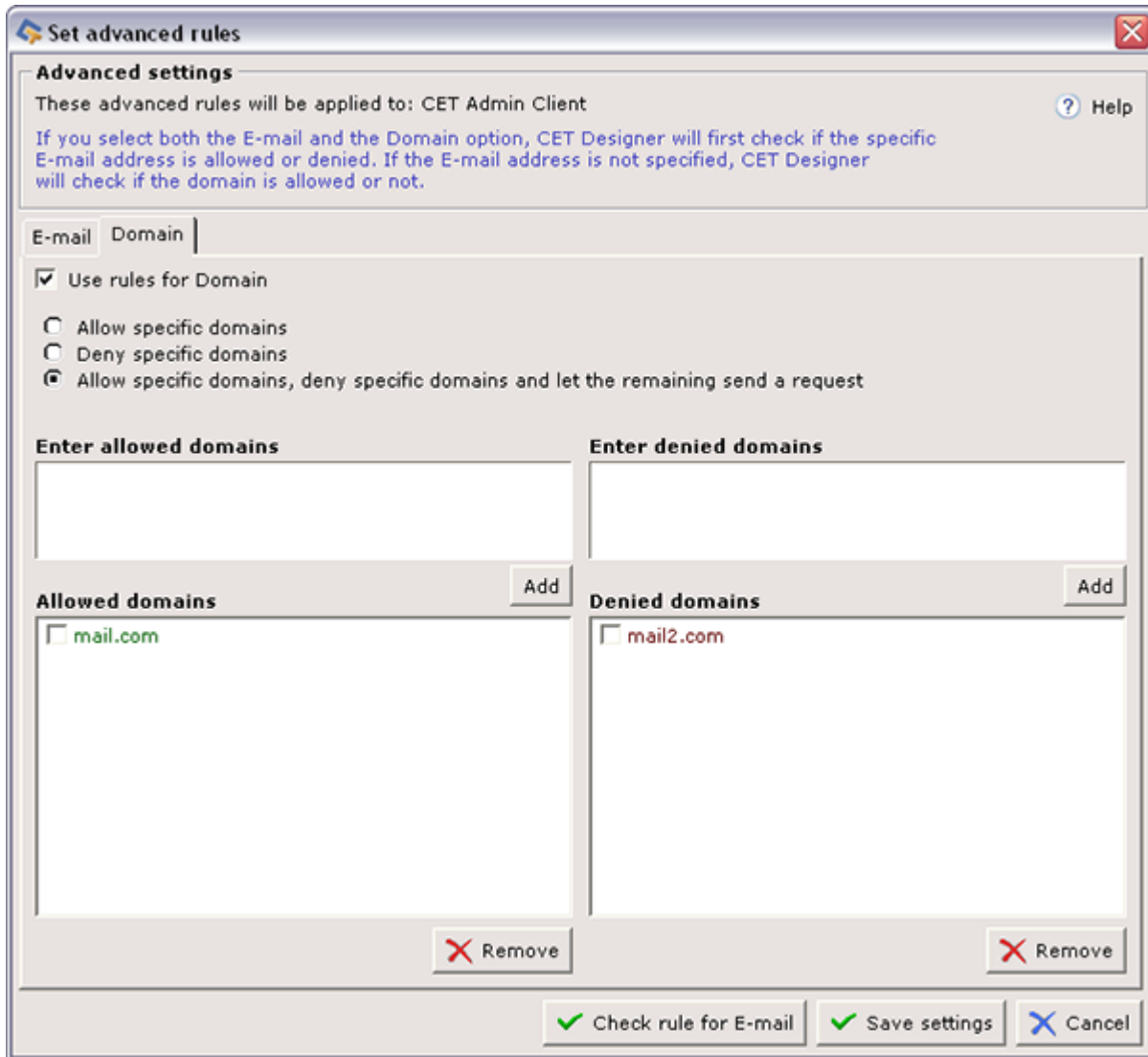


Figure 9 The option Allow specific domains, deny specific domains and let the remaining send a request.

Note: You can only select one of these three options. If you select one option and define your rules and then change to another option, the next time you open the **Supervisor** interface the settings that you defined for the first option will have been lost.

Example: You select the **Allow specific domains** option and then specify ten domains that should be allowed to order a license. Then you change your mind and select the **Deny specific domains** option and specify ten domains that should not be allowed to order a license. Finally you click the **Save settings** button and close the dialog box. The next time you open the **Set advanced rules** dialog box the **Deny specific domains** will be displayed and the settings you made in the **Allow specific domains** will have been lost.

Check Rule for E-mail Address

If you wonder if an E-mail address has a special role connected to it, you can search for the E-mail address instead of going through all the E-mail addresses that you have specified.

In the bottom of the **Set advanced rules** dialog box, you find the **Check rule for E-mail** button. If you click on this button the **Check rule for E-mail** dialog box appears (see Figure 10 below). Enter an E-mail address in the input field and click **Get rule**.

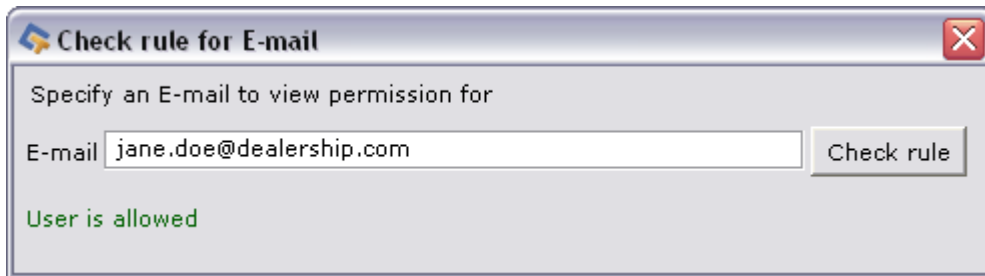


Figure 10 The Check rule for E-mail dialog box.

Below the input field you see the result. You can receive three different results:

- **User is allowed:** This means that you have allowed the user with this E-mail address to order licenses for this specific Extension (see Figure 10 above).
- **User is denied:** This means that you have denied the user with this E-mail address to order licenses for this specific Extension.
- **User is required to send a request:** This means that the user with this E-mail address must send you a request that you can allow or deny. For the user to complete the order process license for this specific Extension you will have to allow this E-mail address.

If you deny the user with this E-mail address to order a license, he or she will be notified that you turned down the request in the **My Extensions** section in the Extension Manager.

Report tool

At the bottom part of the section **Extensions** you will find the feature **Report tool** (see figure 11). The **Report tool** is used for creating reports of the users and licenses for your Extensions.

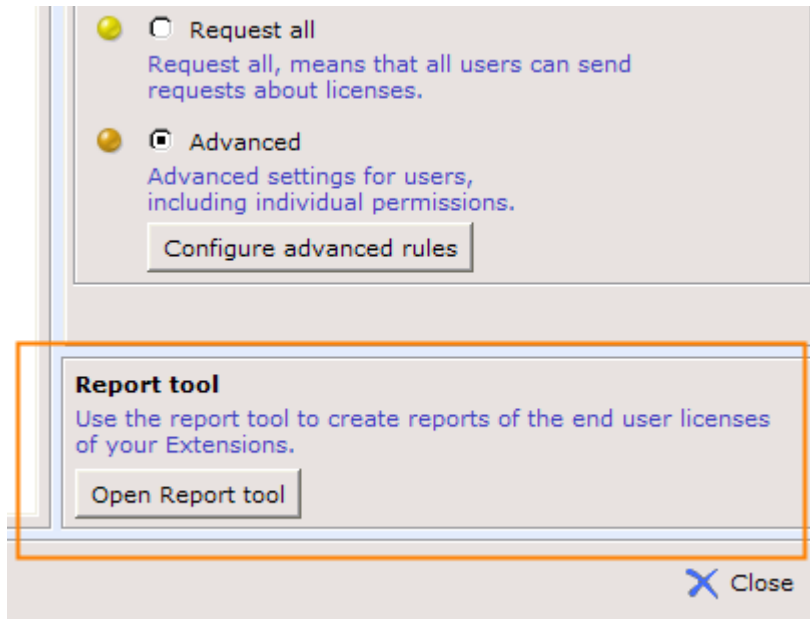


Figure 11 The Report tool

When you click the **Open Report tool** button the dialog **CET Report** opens and you can choose what you wish to include in your report (see figure 12).

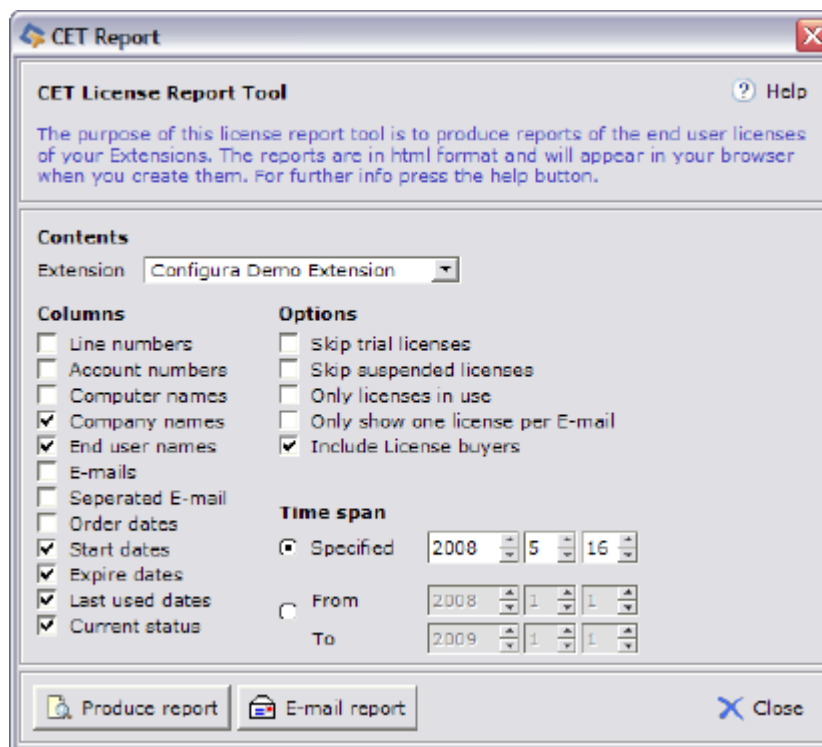


Figure 12 The CET Report dialog

You now have the following choices:

- **Contents:** Choose which Extension you wish to create a report on in the drop down menu.
- **Columns:** Select the desired check boxes in the section **Columns** to choose what you wish to include in the report.
- **Options:** Select the desired check boxes in the section **Options** to choose which licenses you wish to include in, or exclude from, the report.
- **Time span:** Choose if you wish to include licenses valid for a specific date or licenses valid for a certain period of time.

Click **Help** in the dialog's upper right corner if you wish to read more detailed information about all the different options in the **CET Report** dialog.

Click the button **Produce report** or the button **E-mail report** to create the report.

Requests

In the **Requests** section (see Figure 13 below) in the **Extension Supervisor** interface you can allow or deny license-ordering requests from users (i.e. if a user that is required to send a request to order a license). To allow or deny a user to order a license, select the user in the **License Requests** field to the left and click the **Allow** or **Deny** button to the right.



Figure 13 The Requests section in the Supervisor interface.

In the **Requests** section you also have the following options:

- If you select the checkbox below the buttons, and then click **Allow** or **Deny**, the user will automatically be allowed or denied next time he or she tries to order a license for that specific extension.
- Click the **Check all** button if you wish to select all users in the **License Requests** field.
- Click the **Refresh** icon in the dialog's top part if you wish to update the information in the **License Requests** field.
- Mark the checkbox in the bottom right corner if you wish to be notified via E-mail when you have received a request.

Change Password and Personal Information

To change your password and personal information, click the **Options** button in the bottom left corner of the **Extension Supervisor** interface. When clicking the button, the **Settings** dialog box appears (see Figure 14).

Click the option that corresponds to what you wish to do.



Figure 14 The Settings dialog box