



License Manager User Guide

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License Management

Introduction













Licenses may be purchased from PROCAD Software as standalone or network. Standalone licenses, once activated, are only accessible by one machine. Networked, licenses exist in a pool, and may be accessed across a company's network from any computer. The maximum number of users that may work at the same time will be equal to the number of concurrent licenses in the pool.

The installation of the software, along with the type of license purchased, will define the manner in which licenses will be managed, and the procedures that are allowed.




For more information about installation, please refer to the *Installation Guide*.

Configuration Options

There are many configuration options available for installation. Below is a chart with some of the most common configurations:

	<i>Configuration 1</i>	<i>Configuration 2</i>	<i>Configuration 3</i>	<i>Configuration 4</i>
<i>Applications</i>				
<i>Data Files</i>				
<i>Licensing</i>				

Legend

	Workstation installation		Network server #2 installation
	Network server #1 installation		

Configuration 1

This configuration represents a truly standalone installation. The user has a standalone license and will not be sharing data with any other users.

This configuration should be used when the software is being evaluated and for a single-user environment.

Configuration 2

This configuration represents the situation where there are multiple users that need to share data, but have standalone licenses. In this scenario, the data files must first be installed onto a network location before the individual workstations have the applications and licenses installed.

This configuration is most often used for small companies that have chosen standalone licenses but must still share data.

Configuration 3

This configuration represents the situation where it is desired to have the data and the licenses on the same network server, and only the applications reside on the workstations. In this example, the data files and licenses need to be installed on the server before the applications are installed on the individual workstations.

This configuration is most often used for small or medium companies that purchase network licenses, and prefer to keep all of the PROCAD SPOOLCAD files on one server, or when only one network server is available.

Configuration 4

This configuration represents the situation where it is desired to have the data and the licenses installed on separate servers. In this configuration, the data files and licenses need to

be installed on the servers before the applications are installed on the individual workstations.

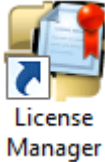
This configuration is most often used for small through large companies that have network licenses, and have multiple servers available for selection. Commonly, one server has already been designated for licenses for other applications and a second server already contains data for the drafting department.

The four configurations above are the most common installation options encountered. However, it is possible to install the applications onto a network server as well, introducing a number of new configuration possibilities.

For all installation configurations, it is important to do the server portions of the installations before the workstations installation are started.

License Application Options

There are two License Applications that may be installed, based on the configuration chosen during the installation.

	<i>PROCAD's License Manager</i>
<i>Configuration</i>	Installed for standalone configurations and license servers.
<i>Application</i>	
<i>Procedures</i>	<ul style="list-style-type: none">▪ Request license codes▪ Apply license codes▪ View license status▪ View floating license usage
<i>Manuals</i>	<ul style="list-style-type: none">▪ License Management User Guide

Procedures

PROCAD's License Manager

Introduction

The License Manager allows you to work with your PROCAD application licenses. Using the License Manager you can:

- View license status for each module or application
- Change license type
- Activate license codes
- Return license codes
- View the floating license usage
- View Trusted storage

- **Warning:** Never move the license folder to a new location. Moving this folder invalidates all current licenses. If for some reason you must place the license folder in an alternate location, contact PROCAD technical support for assistance.

PROCAD's License Manager Procedures

Opening the License Manager

To open the License Manager...

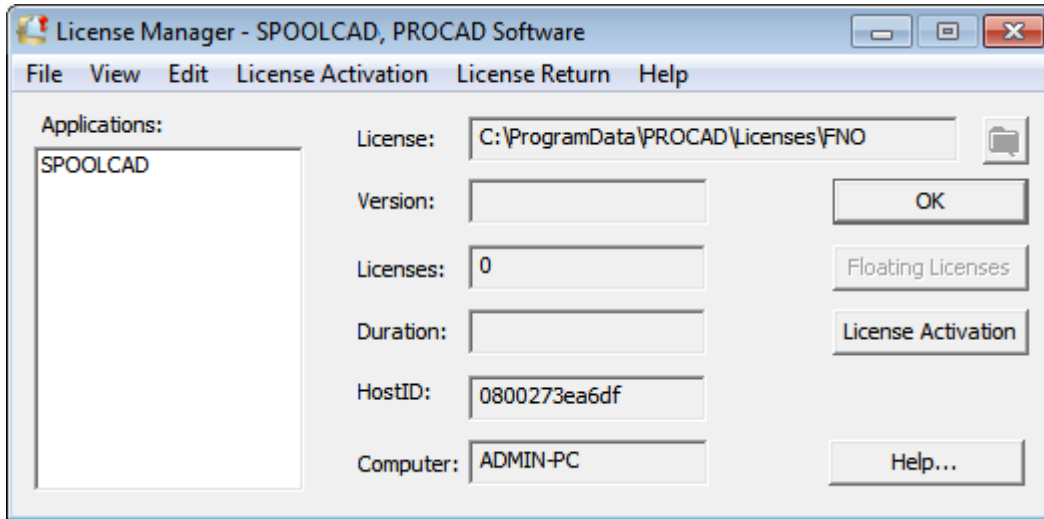
Click on the License Manager icon in the PROCAD SPOOLCAD folder.

SPOOLCAD

SPOOLCAD+



The *License Manager* dialog box appears.



Viewing License Status

You can view current license information for specific applications using the License Manager dialog box.

To view license information...

In the **Applications** field, click the module or application for which you want to view license data. If the module or application has active licensing, these fields display data:

- License name and location: This directory is selected when you perform the initial installation.
- Version
- Licenses (number of)
- Duration

Purchasing Licenses

You can purchase additional software licenses from PROCAD Software at any time.

To purchase licenses...

Contact sales at:

sales@procad.com

phone +1 (403) 216-3375

fax +1 (403) 216-3378

Activate License – Standalone License

If the computer you are installing from does have access to the Internet, please follow the directions below:

Note: To activate the license for your software, you will need an **Entitlement Certificate** that is send to you when you purchase the software.

1. Open the **License Manager** dialog box using the shortcut in the SPOOLCAD 2019 folder.
2. Press the **License Activation** button in the **License Manager**. You can also use the **License Activation** dropdown box in the toolbar.

An activation window will appear. Copy the **ActivationID** that was emailed to you when you ordered the software.

3. If you have a yearly license, make sure the **Yearly License** radio button is selected. For monthly subscription licenses, make sure you select **Monthly Subscription**. Paste the **ActivationID** into the activation ID field.
4. Click the **Activate** button at the bottom window. If the **ActivationID** is valid, a message will appear notifying the license was activated.

If the computer you are installing from does not have access to the Internet (**yearly license only**):

1. Open the **License Manager** dialog box using the shortcut in the SPOOLCAD 2019 folder.
2. Click the **License Activation** option on the toolbar, select **Disconnected** and choose **Generate Request**. A window will appear asking you for a location save a disconnected activation request. Choose a location and click **OK** to save the request file.
3. Select the application you are trying to activate from the dropdown box. If you are activating multiple products, you will need to select each application separately. Click **Activate** to continue.
4. A PROCADproduct.lic file will be generated in the location you specified. Move the PROCADproduct.lic file to a computer that has internet access.
5. From that computer, run the **License Manager**. Click the **License Activation** option on the toolbar, select **Disconnected** and choose **Send Request**. Open the PROCADproduct.lic file.
6. Select a location to save the **PROCAD.lic** file.
7. Paste in the **ActivationID** that was emailed to you when you ordered the software.
8. Click **Activate** and the **PROCAD.lic** license file will be created. Take that file and paste it onto the computer with the software in the following directory:
C:\ProgramData\PROCAD\Licenses\RLM

Activate License – Network License

If the computer you are installing from does have access to the internet, please follow the directions below, else you will need to contact support@procad.com to help you install the license.

Note: To activate the license for your software, you will need an **Entitlement Certificate** that is send to you when you purchase the software. With a network license, you will also have an **activation key** for the RLM licensing software.

1. Open the Windows Services. Scroll down to the **PROCAD RLM** service and start the service.
2. Open a web browser and go to <http://localhost:5054>. This will start the Reprise application to activate the network license.
3. Use the login information to login the server: Username: admin, Password: (none)

Note: You can edit the RLM.pw file to change the user name and password. Please refer to page 46 of the RLM_License_Administration.pdf.

4. Click on status on the left menu.
5. In the Independent Software Vendor (ISV) server section, you will see the PROCAD service. Click on **PROCAD** under the **Activate** section.
6. Enter the **RLM Server activation key** and this should activate the RLM service.
7. You will need to restart the RLM service. On the left side of the reprise website, click on **Reread/Restart Servers**. Select PROCAD as the ISV and click **Reread/Restart**.
8. Go to c:\ProgramData\PROCAD\Licenses\RLM and using Notepad, open the rlm_procad_XXXX-XXXX-XXXX-XXXX.lic file. This file will match your activation key.
9. Copy the first line and replace the first line in the PROCAD.lic file. This file is in the same folder as the previous file.
10. In the rlm_procad_XXXX-XXXX-XXXX-XXXX.lic file, copy the License=xx.
11. Go to the web browser and click on **Activate License** on menu to the left.
12. The next few settings are as follows:
 - a) The ISV activation website should be www.hostedactivation.com. Click **Next** to continue.

License Activation (step 1 of 5) - select activation server

RLM licenses can be activated from a number of different websites. First, enter the website below, then press "Next".

ISV activation website:

- b) Enter PROCAD as the ISV. Copy and paste the Activation key of the production you purchased. This is not the same as the Activation key for the RLM. Click **Next** to continue.

License Activation (step 2 of 5) - specify license activation key

RLM licenses are activated based on an *activation key* which you received from your software vendor. This *activation key* will specify the product to be activated. Enter your *ISV name* and *activation key* below, then press "Next".

ISV:
License activation key:

- c) Paste the License=xx into the License Server or Node-lock hosted section. Click **Next** to continue.

License Activation (step 3 of 5) - specify machine for nodelocked license or license server and license count

RLM licenses are locked to a particular computer which is identified by a *hostid*. This is true for nodelocked licenses (the license itself is locked) and floating licenses (the license server is locked). The *hostid* of this machine is filled in below - if you want to lock this license (or license server) to this computer, leave the *hostid* field as-is, otherwise, enter the *hostid* of the machine you would like to lock the license (server) to. Floating licenses require a count. When you have selected the desired *hostid* and license count, press "Next".

License Server or Node-lock *hostid*:
License count (for floating licenses):

- d) The license file should point to the default license file location. Click **Next** to continue.

License Activation (step 4 of 5) - specify license file location

RLM licenses are stored in a *license file* which needs to be accessed by either the license server (for floating licenses) or the application. By default, we place the license file in the directory where you started this *rlm* process. When you execute the *restart/reread* command on the left, the new license file will be read by *rlm*. However, you can specify a different location for the license file if you wish. When you have selected the desired license file location, press "Next".

License File to create or edit:

- e) The activation setup should look like the image below. Click **Request License** to continue.

License Activation (step 5 of 5) - verify parameters and request license

You have now entered all the data required for activation. Please verify this is the license you want to generate, and if so, press the "REQUEST LICENSE" button below. This will request the license from the internet, and place it in the file specified below. Note that this operation may take up to 15 seconds.

Activation Request Data:

Activation Server	www.hostedactivation.com
ISV	PROCAD
Activation Key	xxxx-xxxx-xxxx-xxxx
Count	1
Hostid	License=xx
License File	C:\ProgramData\PROCAD\Licenses\RLM\activate1.lic

- f) A confirmation will display the license you are licensed for. Click on **Restart License Service**
- g) Select PROCAD as the ISV and click **Reread/Restart**.

- h) Run the License Manager application and you can check if the license is working properly. When you click on the products on the left side of the License Manager, it will display the license count and duration.

Returning a License – Standalone License

If you need to return a license, you can deactivate the license for this machine by following the instructions below:

1. Open the **License Manager** dialog box using the shortcut in the SPOOLCAD 2019 folder.
2. Click the **License Return** in the toolbar and select the **Return License** command.
3. A window will appear listing your active licenses. You can check the entitlements that you would like to return and click the **Return** command to return the license.

If the computer you are installing from does not have access to the Internet (**yearly license only**):

1. Open the **License Manager** dialog box using the shortcut in the SPOOLCAD 2019 folder.
2. Click the **License Return** option on the toolbar, select **Disconnected** and choose **Generate Request**. A window will appear asking you for a location save a disconnected return request. Choose a location and save the request file.
3. A window will appear listing your active licenses. You can check the licenses that you would like to return and click the **Return**.
4. A PROCADReturn.lic file will be generated. Move that file to a computer with internet access and run the **License Manager**.
5. Click the **License Return** option on the toolbar, select **Disconnected** and choose **Send Request**. A window will appear asking you for the PROCADReturn.lic file. Select the file and click **Return**.
6. The License will be returned and can be reactivated on another computer.

Returning a License – Network License

If the computer you are installing from does have access to the internet, please follow the directions below:

1. Open a web browser and go to <http://localhost:5054>. This will start the Reprise application to activate the network license.
2. Click on **Status** on the left menu.
3. In the Independent Software Vendor (ISV) server section, you will see the PROCAD service. Click on **PROCAD** under the **Activate** section.

4. Enter the **RLM Server activation key** that you are returning.

Make sure the **deactivate** check box is selected. And click **Activate/Deactivate**. A message that the license was deactivated will be displayed.

Viewing Available Licenses

You can view the license information in the *PROCAD License Information* dialog box:

- Name of the licensed application
- The version of the application you have
- The number of licenses for each application
- The expiration date of each application

To view available license information, choose one of the following method:

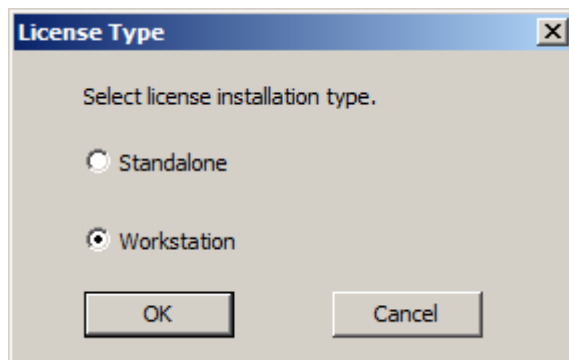
- a. In the **Application** list of the *License Manager* Dialog box, click an application. If there are current licenses for this application, the Licenses, Duration, and Version fields populate.
- b. Click the **View > Available Licenses** button to open a dialog box where you can view the available license information. This will show the application, the Licenses, Duration and Version.

Moving Between License Types

If you decide to upgrade a standalone license to a network license, you will need to direct the workstation to look to the license server for the license file instead of at its own file location.

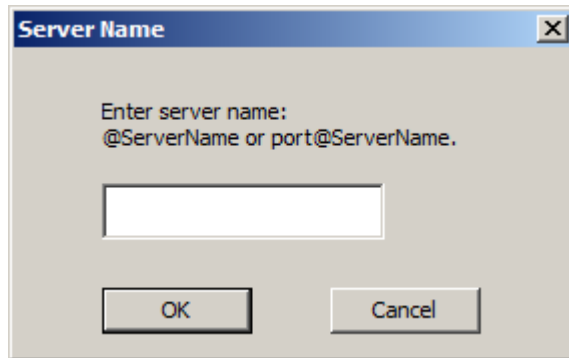
To move between license types...

1. From the **Edit** menu, select the *Change License Type* command. The *License Type* dialog will open.



2. Select the desired license option.
3. If you select the **Standalone** option, the license will be set to as @localhost.

4. If you select **Workstation**, you will be prompted to enter the name of the server where the network license file is located. This is always in the format of @SERVERNAME



Note: When you are using a server installation, the License Manager will not have the option to move between license types.

Windows Firewall Exception

When a license server is setup on a computer that utilizes Windows Firewall you need to add the PROCAD.exe vendor daemon and lmgrd.exe to the exceptions list.

To add the exception on Windows 7...

1. Open the **Control Panel**
2. Select **System and Security**
3. Under Windows Firewall select **Allow A program though windows Firewall**
4. Click the **Change settings** button
5. Click the **Allow another program...** button
6. Click on the **Browse...** button
7. Navigate to the license folder and select **PROCAD**
8. Click the **Open** button
9. Click the **Add** button
10. Repeat steps 5-9 while selecting **lmgrd** instead of PROCAD
11. Click the **OK** button

To add the exception on Windows Vista...

1. Open the **Control Panel**
2. Under Security select **Allow a program though Windows Firewall**
3. Click the **Add program...** button
4. Click the **Browse...** button
5. Navigate to the license folder and select **PROCAD**
6. Click the **Open** button
7. Click the **Ok** button
8. Repeat steps 3-7 while selecting **lmgrd** instead of **PROCAD**
9. Click the **Ok** button

Reprise License Server Tools

Reprise License Server Page

The License Manager uses Reprise License Manager(RLM) Server Page technology from Reprise Software. RLM provides administrative tools that help to perform additional management actions for network licenses. You can use RLM tools to monitor network license status, reset licenses lost to a system failure, troubleshoot license servers, and update existing license files on the fly.

The PROCAD License Manager is used to view the licenses on the server and to view the information about the licenses and the computer.

Utility for License Server Management

RLM provides a local web application for managing the license server. This tool can be found at the following website: <http://localhost:5054>. With the web application, you can activate the software, deactivate the software, monitor network license usage

You can use the web application to:

- Start and stop the license service
- Configure, update, and reread the license file
- Diagnose system or license problems
- View server status, including active license status.

Learning About Your License

In this section, more information about the licenses, such as license operation and availability, the license file, license types and behaviors, and the heartbeat signal will be described.

License Operation and Availability

When you start a PROCAD application, the product determines through the registry the server from which it should try to obtain a license. The product then requests a license through the TCP/IP network protocol to the license server.

If the number of available licenses has not been exceeded on the license server, the server's License Manager assigns a license to the workstation. The application completes its startup process on the workstation, and the number of available licenses on the server is reduced by one.

Likewise, when you exit a PROCAD application, the server's License Manager increases the number of available licenses by one, freeing up an additional license for another user. Every application that is opened on an individual workstation reduces the number of available licenses. For example, opening three P&ID applications on one workstation using networked licenses reduces the number of available licenses on the server by three.

For standalone licenses, or licenses that exist on the workstation itself, multiple applications may be opened with the license. For example, opening three P&ID applications on one workstation using standalone licenses only requires one standalone license.

The following three processes manage the distribution and availability of licenses:

- **RLM license server** (*rlm.exe*). This handles the web application. When the PROCAD RLM service is started, it will activate the web application allowing users to load the page.
- **PROCAD license server** (*Procad.exe*). The PROCAD license server is used by the RLM license server. It is a file that is required for RLM to run properly.
- **License file**. This will only apply to servers. A text file that has vendor-specific license information.

Heartbeat Signal

When a PROCAD product is running, it communicates with the license server at regular intervals using a communication method known as the "heartbeat" signal. If the heartbeat signal is lost, the server tries to reconnect. If the server cannot reconnect, the user receives a license error.

If the product stops working because it has lost a connection to the server, you must shut down the product, and then restart it. If the problem causing the original loss of the heartbeat signal is resolved and there are available licenses on the server, the program can be restarted.

Borrowing Licenses

The borrow feature will allow a license to be checked out from the network server to a local machine for a period, determined by the user. This is useful when the computer where the application is to be run will not be connected to the network for a period, such as when a laptop must be brought out of the office to a field office. The borrow feature is not automatically added to all network licenses, and must be requested from PROCAD.

To request the borrow feature, please contact sales at:

sales@procad.com

phone +1 (403) 216-3375

fax +1 (403) 216-3378

Dialog Boxes

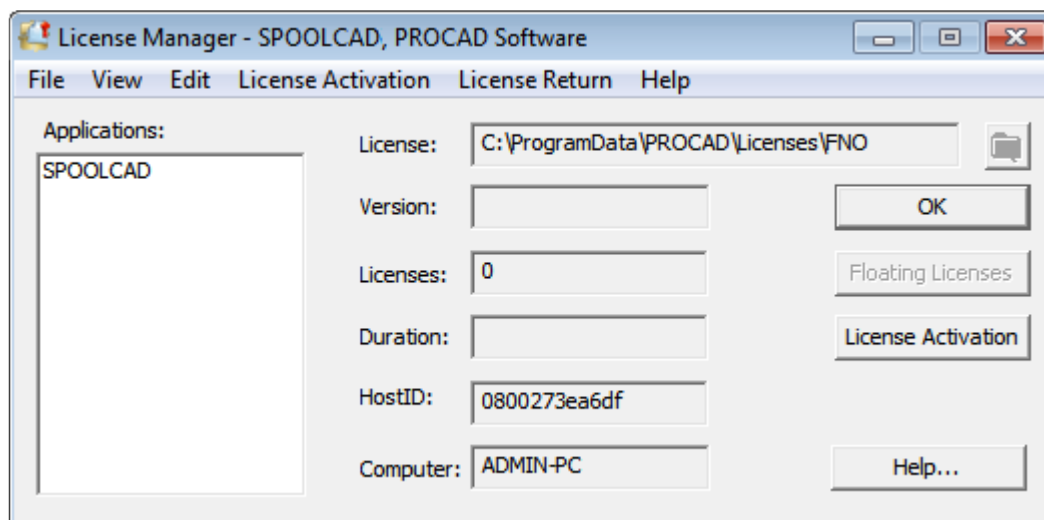
License Manager Dialog Box

Use this dialog to:

- View license status
- Activate Licenses
- Access the *Floating Licenses* dialog box

To access this dialog box...

Open the *License Manager* Dialog box using the shortcut in the PROCAD SPOOLCAD or PROCAD SPOOLCAD+ folder.



In this field...	Do this...
Applications List	Click the application for which you want to view or change license information.
License Field and Button	Nothing. This field displays current license location. You can relocate the license using the Select Folder button to the right of the field.
Version	Nothing. This field displays user level for the license for the application selected in the Applications list.
Licenses	Nothing. Displays the number for licenses for the application selected in the Applications list.

In this field...	Do this...
Duration	Nothing. This field displays the remaining license period for the selected application.
Host ID	Ethernet address of the computer running the visible instance of the License Manager.
Computer	Host name of the computer running the visible instance of the License Manager.
OK	Click to close this dialog box
Floating Licenses	Click to access the <i>Floating Licenses</i> dialog box where you can view floating license information for the application you select in the Applications List .
License Activation	Click to input the activation code for the license of the software.
Help	Click to access Help for this dialog box.

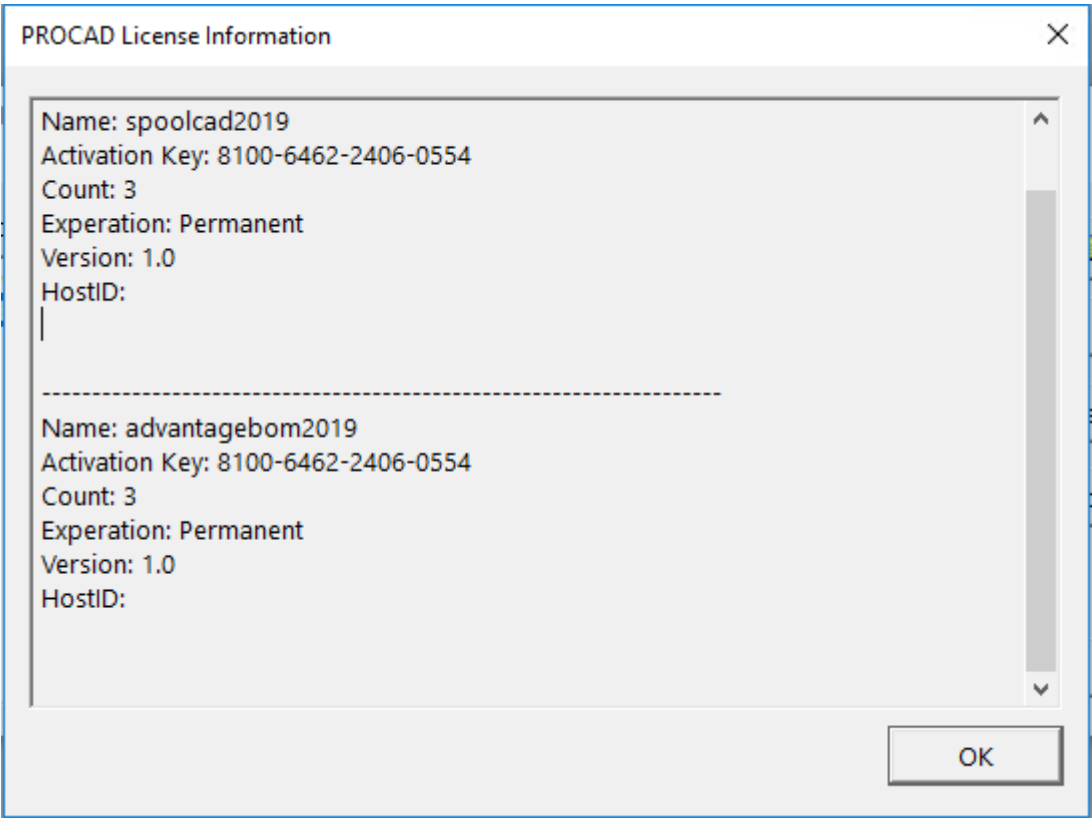
Available Licenses Dialog Box

Use this dialog box to view a list of all licenses for the selected application. This dialog box displays:

- A list of licenses currently applied to the server
- The activation key used to license the software
- The number of licenses available

To access this dialog box...

In the ***License Manager*** Dialog box, click the **View** in the menu bar and choose **Available Licenses**.



In this field...	Do this...
OK	Click to close this dialog box.