# Tricerat License Installation Guide for the Tricerat License Server

## Release Info

This version of the *Tricerat License Installation Guide* is applicable for all software versions 6.6 and greater of Simplify Scanning, all software versions 6.8 and greater of ScrewDrivers, Simplify Suite, and all software versions 1.6.5 and greater of Simplify Printing TX, and is current until replaced.

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## Customer Support

Customer support is available to organizations that purchase ScrewDrivers, Simplify Suite, Simplify Scanning and/or Simplify Printing TX and that have an annual support agreement. Contact Tricerat at:

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# Preface

Welcome to the *Tricerat License Installation Guide*. The purpose of the *Tricerat License Installation Guide* is to answer your questions and guide you through the procedures necessary to license a trial or purchased version of ScrewDrivers, Simplify Suite, or Simplify Scanning efficiently and effectively.

## Using the manual

You will find the *Tricerat License Installation Guide* easy to use. You can simply look up the topic that you need in the Table of Contents. Later, in this Preface, you will find a brief discussion of each chapter to further assist you in locating the information that you need.

## Special information about the manual

The *Tricerat License Installation Guide* has a dual purpose design. It can be distributed electronically and then printed on an as-needed basis, or it can be viewed online in its fully interactive capacity. If you view the document online, a standard set of bookmarks appears in a frame on the left side of the document window for navigation through the document.

## Conventions used in the manual

The *Tricerat License Installation Guide* uses the following conventions:

- Information that can vary in a command—variable information—is indicated by alphanumeric characters enclosed in angle brackets; for example, <Server>. Do not type the angle brackets when you specify the variable information.
- A new term, or term that must be emphasized for clarity of procedures, is *italicized*.
- Page numbering is “online friendly.” Pages are numbered from 1 to x, *starting with the cover*, and ending on the last page of the guide.

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*Although numbering begins on the cover page, this number is not visible on the cover page or front matter pages. Page numbers are visible beginning with the first page of the Table of Contents.*

- This manual is intended for both print and online viewing.
  - If information appears in blue, it is a hyperlink. Table of Contents entries are also hyperlinks. Click the hyperlink to advance to the referenced information.

# Assumptions for the manual

The *Tricerat License Installation Guide* assumes that:

- References to any third-party standards or third-party software functions were current as of Version 6.6 of Simplify Scanning, Version 6.8 of ScrewDrivers, Simplify Suite, and Version 1.6.5 of Simplify Printing TX, and might have already changed.

# Organization of the manual

In addition to this Preface, the *Tricerat License Installation Guide* contains the following chapters:

- Chapter 1, “Setting Up or Updating Tricerat Licensing,” on page 6 details the Tricerat licensing models and the differences among them. It also details how to install the Tricerat License Server, and how to add the user accounts that are required for the Named User licensing model. Finally, it also provides information about updating a Tricerat license.
- Chapter 2, “Tricerat Licensing Considerations,” on page 21 describes the contingency procedures that Tricerat has in place in the event that a server has the potential of being moved to a different piece of hardware. It also describes how you can change the licensing mode for any product that uses the Tricerat LMX licensing technology and, if you move your Tricerat License Server to a different piece of hardware, how you can specify the new address.

# Chapter 1
# Setting Up or Updating Tricerat Licensing

A Tricerat product can be licensed in one of four models. The license model for the product that you are installing determines the licensing information that you enter when installing the Tricerat License Server. The model also determines if the Tricerat product is immediately available after the license server is installed, or if you first must add user accounts before your users can run the product. Finally, the chapter provides information about updating a Tricerat license.

This chapter covers the following topics:


- "License Models for Tricerat Products" on page 7.
- "Installing the Tricerat License Server" on page 9.
- "Adding Named User Accounts" on page 13.
- "Renewing or Updating an Existing Tricerat License File" on page 19.

# License Models for Tricerat Products

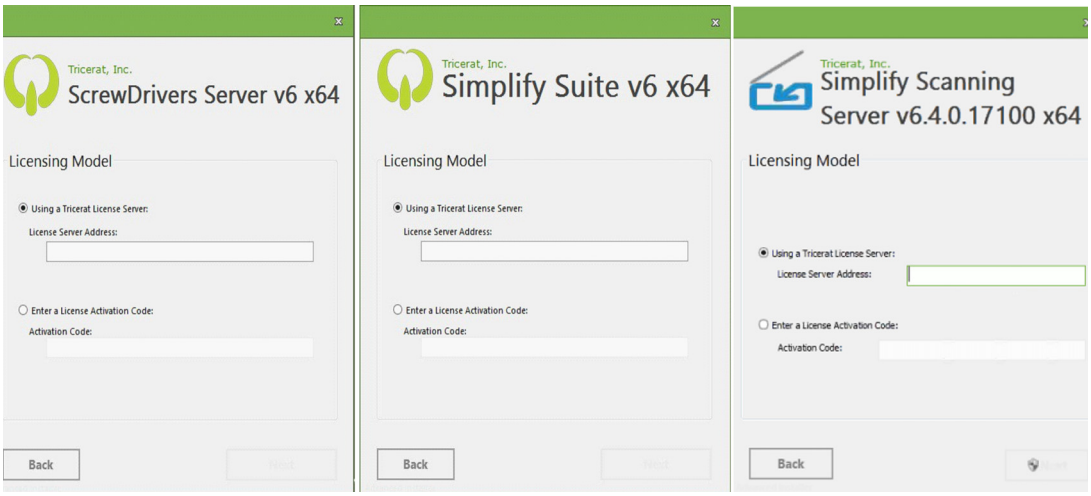
Simplify Suite (trial version or purchased version), and Simplify Scanning (purchased version only) and ScrewDrivers (purchased version only) can be licensed in one of four models:

- Nodelocked
- Concurrent Server
- Concurrent User
- Named User

A trial version of ScrewDrivers or Simplify Scanning can be licensed only in the Nodelocked model.

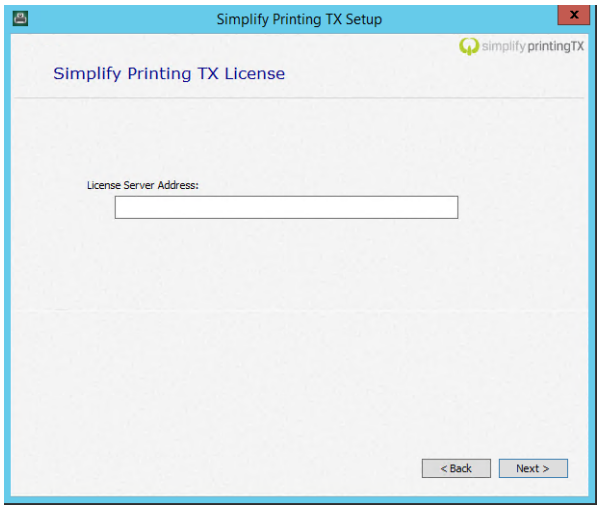
Figure 1-1 shows the Licensing Model pages that open during the installation of ScrewDrivers, Simplify Suite, or Simplify Scanning.

*Figure 1-1: Tricerat Licensing Model pages for ScrewDrivers, Simplify Suite, and Simplify Scanning*




Simplify Printing TX can be licensed only in the user models of Concurrent User or Named User. Figure 1-2 on page 8 shows the Licensing Model page that opens during the installation of Simplify Printing TX.

*Figure 1-2: Tricerat Licensing Model page, Simplify Printing TX*




If you are installing a Tricerat product under the Nodelocked model, then Tricerat emails an activation code to you. You must select Enter a License Activation Code, and then in the Activation Code field, enter the supplied activation code.

If you are installing a Tricerat *product* under any of the other licensing models (Concurrent Server, Concurrent User, or Named User), you must select Using a Tricerat License Server, and then in the License Server Address field, enter the address where the Tricerat License Server is installed. The address must be in the format of <port>@<address>, where:

- The port is optional. (The default value is 6200.)
- The address can be an IP address, a machine name, or a Fully Qualified Domain Name (FQDN) as long as it can be routed from the ScrewDrivers Server, the Simplify Suite Server, or the Simplify Scanning Server. For example, valid addresses include 6200@licserver, licserver@Tricerat.com, or mylicserver.

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*For instructions about installing the Tricerat License Server, see "Installing the Tricerat License Server" on page 9.*

# Installing the Tricerat License Server

If you are installing a Tricerat product under any of the following three licensing models—Concurrent Server, Concurrent User, or Named User—then you must install the Tricerat License Server. The Tricerat License Server installation file is called TriceratLicenseServer_<version_number>_x64, (for example, TriceratLicenseServer_5.0.3.0_x64), and you can download it from the Tricerat website by:

1. Opening the Tricerat website: www.tricerat.com.
2. Logging in with your customer credentials.
3. Opening Product Downloads, and locating and downloading the correct download file.

You must run the Tricerat License Server executable on a 64-bit server OS. The installation requires at least 19 MB of free disk space. By default, the server is installed in C:\Program Files\Tricerat, but you can always select a different installation directory. Tricerat supplies the necessary server activation code in an email to you. If your Tricerat products are using a Concurrent Server or Concurrent User license model, then they are available for use immediately after you install and activate the license server. If your products are using a Named User license model, then you must first add the accounts for the users who are allowed to run the product.

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*The following procedure assumes that the server that is hosting the Tricerat License Server or another Tricerat product has Internet access. In the event that the hosting server does not have Internet connectivity, see "Activating a License without Internet Access" on page 22.*

## To install the Tricerat License Server

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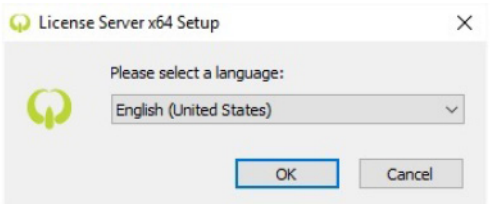
*Before installing the Tricerat License Server, confirm that you have at least 19 MB of disk space available in the intended installation directory on your 64-bit server OS.*

4. Download the Tricerat License Server installation file, TriceratLicenseServer_<version_number>_x64, onto your 64-bit server OS.
5. Double-click the file to start the installation.

   The License Server x64 Setup dialog box opens.

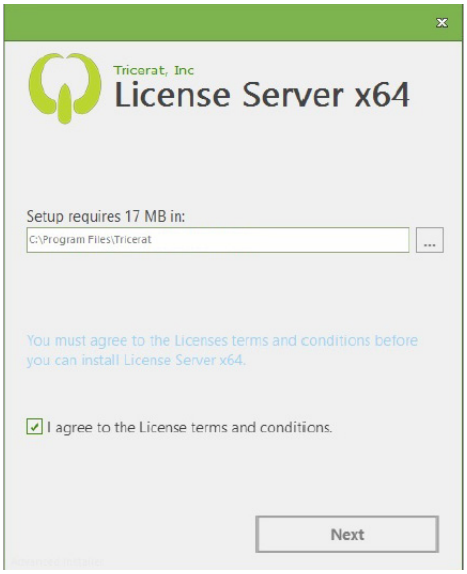
*Figure 1-3: License Server x64 Setup dialog box*



6. Select the installation language (English (United States) is the default value), and then click OK.

   The Tricerat License Server Installation wizard opens. The Terms and Conditions page is the active page.

*Figure 1-4: Tricerat License Server Installation wizard, Terms and Conditions page*




7. Do one of the following:
   - Leave the installation directory set to the default value of C:\Program Files\Tricerat.
   - Next to the installation directory field, click the Browse button to browse to and select a different installation location.

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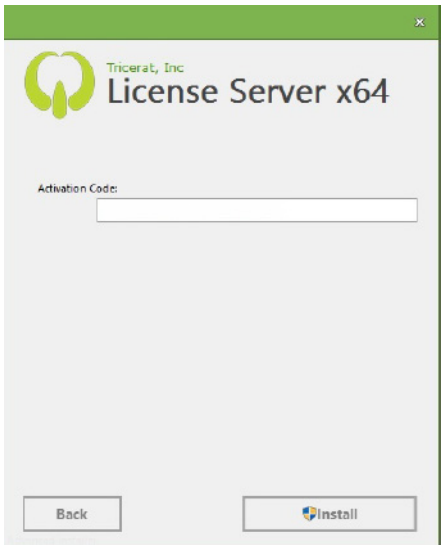
*Tricerat strongly recommends that you leave the installation directory set to its default value.*

8. Optionally, to read the license terms and conditions, click License terms and conditions; otherwise, select I agree to the License terms and conditions, and then click Next.

   The Activation Code page opens. See Figure 1-5 on page 11.

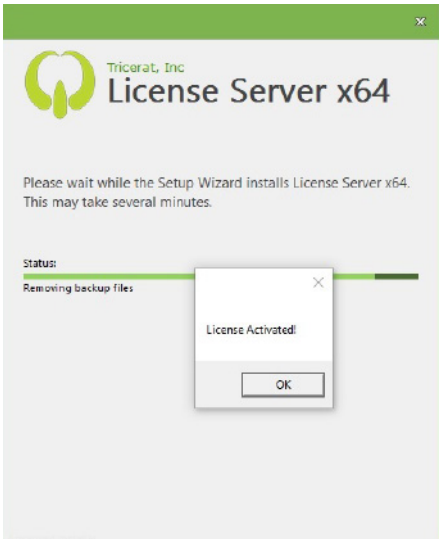
*Figure 1-5: Tricerat License Server Installation wizard, Activation Code page*




9. In the Activation Code field, enter the license server activation code that Tricerat emailed to you, and then click Install.

   The Installation Progress page opens. During the installation, a License Activated message opens on top of the Installation Progress page.

*Figure 1-6: Tricerat License Server Installation wizard, Installation Progress page and License Activated message*



10. Click OK.

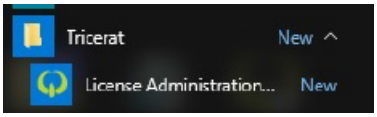
    The License Activated message closes, and the installation continues. After the Tricerat License Server is successfully installed, the Finish Installation page opens.

*Figure 1-7: Tricerat License Server Installation wizard, Finish Installation page*

11. Click Finish.

    The Tricerat License Server Installation wizard closes. After the Tricerat License Server is installed, an entry for the Tricerat License Administration Console is placed in your Start menu.

*Figure 1-8: Tricerat Licensing Administration Console entry*




- If your Tricerat products are using a Concurrent Server or Concurrent User license model, then they are available for use immediately.
- If your Tricerat products are using a Named User license model, then you must first add the accounts for the users who are allowed to run the product. Continue to “Adding Named User Accounts” on page 13.

# Adding Named User Accounts

If your Tricerat products are using a Named User license model, then after you install the Tricerat License server, you must add the accounts for the users who are allowed to run the product. You have two options for adding named user accounts – you can import users from your organization's Active Directory, which is the preferred method, or you can manually add named users. When you add named user accounts, you must do so on a per product basis.

*To view the Tricerat products for which named user licenses are applicable, including the total number of named user licenses allowed for each product and the number of licenses that are currently available, open the Usage tab on the Tricerat License Administration Console.*

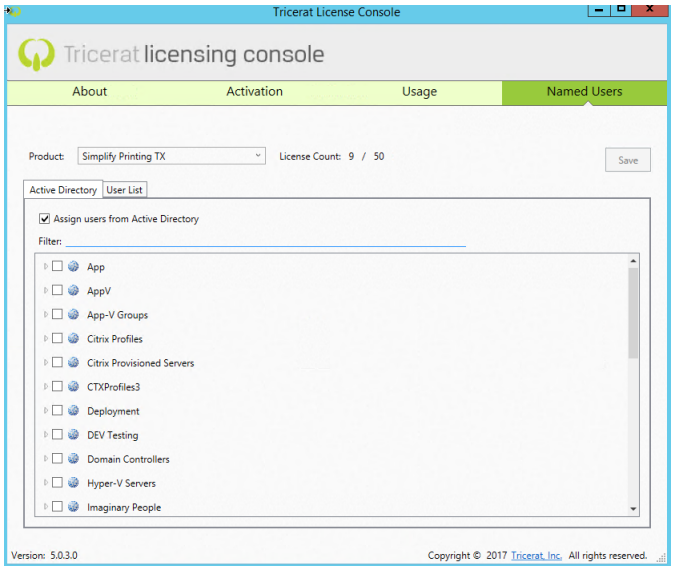
## To add named user accounts

1. On the Tricerat License Administration Console, open the Named Users tab.

   The tab has two sub-tabs – Active Directory and User List. The Active Directory (AD), which is the open tab, displays *all* the Organizational Units (OUs) and groups that have been imported from your organization's AD.

*To display only those AD OUs and/or groups that meet specific criteria, in the Filter field that is displayed above the Import from Active Directory sub-tab, enter standard search syntax for Microsoft SQL Server. The search results are any matched user and all related records. For detailed information about standard search syntax for Microsoft SQL Server, see https://msdn.microsoft.com/en-us/library/system.data.datacolumn.expression(v=vs.110).aspx.*

*Figure 1-9: Tricerat License Administration Console, Named Users tab, Active Directory sub-tab*



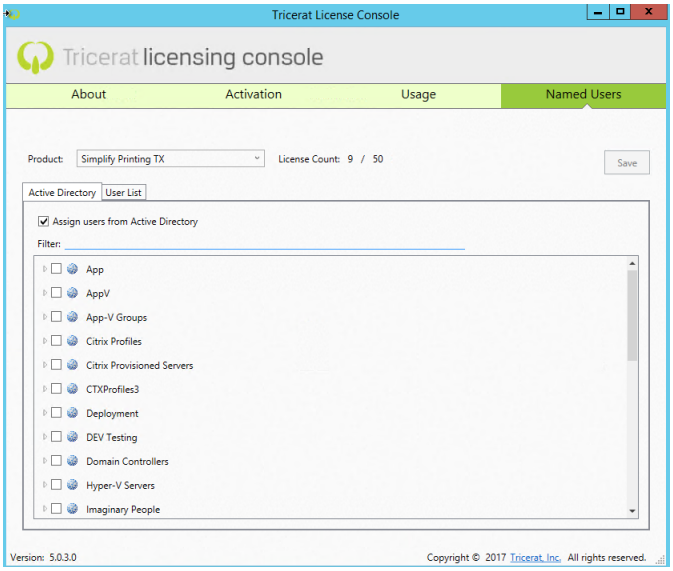
2. On the Product dropdown list, select the appropriate product, for example, ScrewDrivers.
3. Continue to one of the following:
   - "To import users from your organization's Active Directory" below.
   - "To manually add named users" on page 16.

## To import users from your organization's Active Directory

1. On the Active Directory sub-tab, make sure that Assign users from Active Directory is selected.
2. Select the OU and/or group (CTRL-click to select multiple OUs and/or groups), and then click Save.

   All the users that are assigned to the selected OUs and/or groups are displayed by name in the User column on the User List tab and the OU/group that contains the user is displayed in the Assigned From column. If a user belongs to multiple OUs and/or groups, then a comma-delimited list displays the name of all the OUs and/or groups in the Assigned From Column.

*Figure 1-10: Tricerat License Administration Console, Named Users tab, Active Directory sub-tab*




Note the following if you add users by importing from the Active Directory:

- The memberships for the selected OUs and/or groups are dynamically updated after you log out of the console and then log back in, and then click Save on the Named Users tab. If members have been removed from an OU or group since your last login, then these members are removed from the User List and the licenses are available for assignment. If members have been added to an OU or group since your last login, then these members are added to the User List and licenses are assigned.

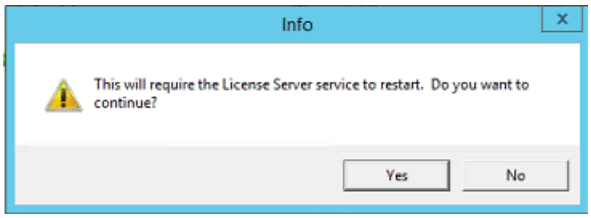
- If the number of users exceeds the number of allowed/available named user licenses, then the License Count is displayed in red, and the Save button is not enabled. To add more users, you must either increase your license count, or delete current users.

*Figure 1-11: License count exceeded indicators*

3. After you have added all the required Named User accounts, click Save.

   A message opens indicating that the Tricerat License Server service must be restarted.

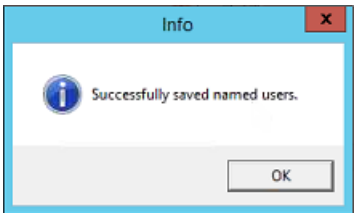
*Figure 1-12: Restart License Server message*




4. Click Yes.

   The Restart License Server service message closes, and the service is restarted. After the service is restarted, a message opens indicating that the named users were successfully saved.

*Figure 1-13: Named Users successfully saved message*




5. Click OK.

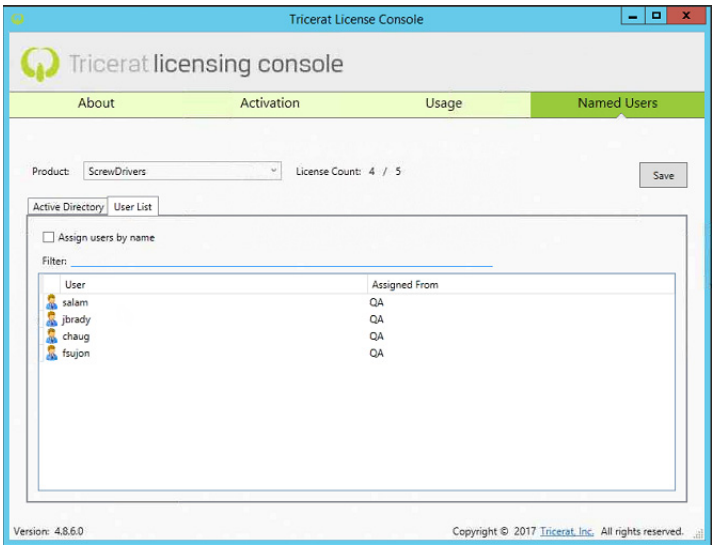
   The message closes. The Named Users can now run the product.

## To manually add named users

Although importing users from Active Directory is the preferred method for adding named users, in some situations, this might not always be possible, for example, your organization does not use Active Directory, or your organization's Active Directory cannot be read. Note, however, that if you elect to manually add named users, this process uncouples the user list from Active Directory. Active Directory objects can no longer be refreshed, so your user lists are no longer dynamically updated.

1. Open the User List sub-tab.

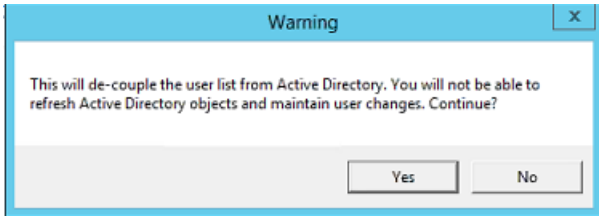
*Figure 1-14: Tricerat License Administration Console, Named Users tab, User List sub-tab*




2. On the User List sub-tab, select Assign users by name.

   A Warning message opens, indicating that this process uncouples the user list from Active Directory and that Active Directory objects can no longer be refreshed, so your user lists are no longer dynamically updated. You are also prompted to Continue.

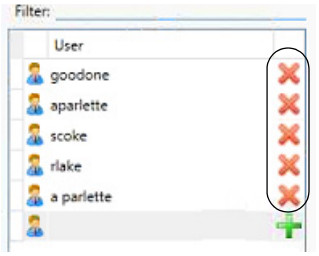
*Figure 1-15: Warning message*



3. Click Yes.

   The message closes. The User List sub-tab remains open. The displays all the named users who have previously been assigned licenses.

*Figure 1-16: User list display when manually adding named users*




4. Do one or both of the following as appropriate:

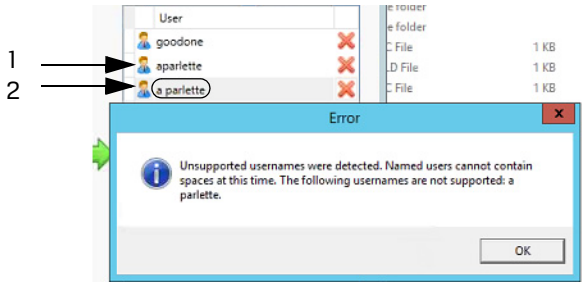
   - For each named user that is to be manually deleted, click the Delete User icon ( ).

     For each name user that is to be added, click the Add User icon ( ), and then enter the username for the user.

     When manually adding named users, note the following:

     - When you manually enter a user, the username cannot contain any spaces. If the username contains any spaces, then a message opens indicating that the username is not supported.

*Figure 1-17: Unsupported Username message*




| Item | Description |
|---|---|
| 1 | Supported username |
| 2 | Unsupported username |

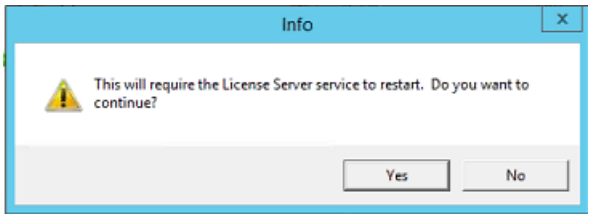
     - If the number of users exceeds the number of allowed/available named user licenses, then the License Count is displayed in red, and the Save button is not enabled. To add more users, you must either increase your license count, or delete current users.

*Figure 1-18: License count exceeded indicators*

5. After you have added all the required Named User accounts, click Save.

   A message opens indicating that the Tricerat License Server service must be restarted.

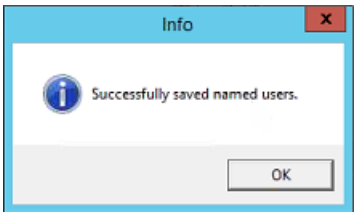
*Figure 1-19: Restart License Server message*




6. Click Yes.

   The Restart License Server service message closes, and the service is restarted. After the service is restarted, a message opens indicating that the named users were successfully saved.

*Figure 1-20: Named Users successfully saved message*




7. Click OK.

   The message closes. The Named Users can now run the product.

# Renewing or Updating an Existing Tricerat License File

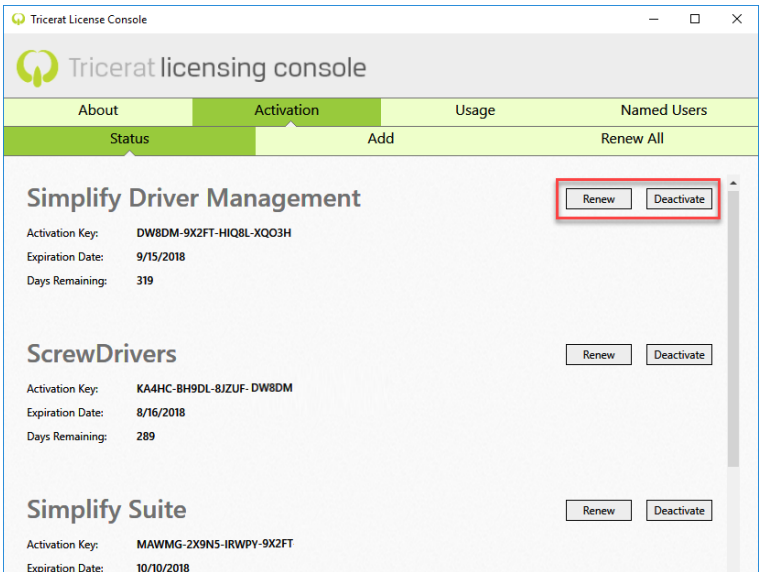
You can renew a maintenance-based or subscription-based Tricerat license. You also have the option of updating your current Tricerat license file for many reasons, including:

- You are transitioning from a trial license period to a production license.
- You are extending a trial license.
- You are implementing a new license server.

## To renew or update an existing Tricerat license file

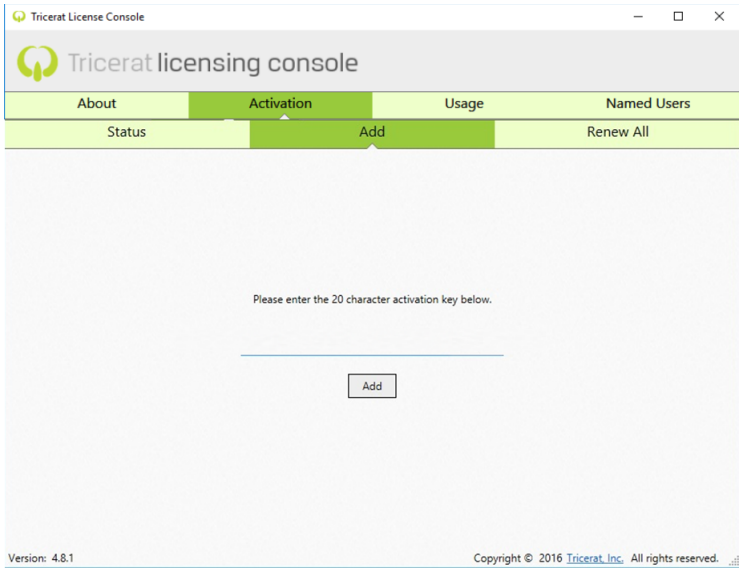
1. Open the Tricerat Licensing Administration Console.
2. From the Activation tab, open the Status sub-tab.

*Figure 1-21: Tricerat Licensing Administration Console, Status sub-tab*




3. Do one of the following:
   - If you are extending a trial license for a product, then click Renew.
   - If you transitioning a license for a product, or you are implementing a new license server (you are moving the existing license to a new server), then do the following in the order indicated:
     - Copy the license activation code that Tricerat emailed to you to a safe and accessible location.
     - Click Deactivate.
     - On the existing or new server, from the Activation tab, open the Add sub-tab. See Figure 1-22 on page 20.

*Figure 1-22: Tricerat Licensing Administration Console, Add sub-tab*




4. Enter the license activation code that Tricerat emailed to you, and then click Add.

   Your new license is now activated and in use. The Status sub-tab displays the expiration date for the new license and the Usage tab displays the number of users or servers that the new license allows.

# Chapter 2
# Tricerat Licensing Considerations

Typically, you install a Tricerat license on a server that has internet connectivity; however, Tricerat has contingency procedures in place in the event that a server does not have internet connectivity. You can change the licensing mode for any product that uses the Tricerat LMX licensing technology and if you move your Tricerat LIcense Server to a different piece of hardware, you can also specify the new address.

This chapter covers the following topics:


- "Activating a License without Internet Access" on page 22.
- "Changing Tricerat Licensing Options" on page 26.

# Activating a License without Internet Access

If the server that is hosting the Tricerat License Server or any other Tricerat product does not have internet connectivity, then you must activate and download the necessary license from another server that has internet connectivity, and copy this license to the host server.

## To activate a license without internet access

1. On the host server, locate and run the following executable: lmxconfigtool.exe. This file resides in the following location:
   - For the Tricerat License Server - C:\Program Files\Tricerat\Simplify Licensing.
   - For any other Tricerat product - The installation directory for the product.

   The main window for the LM-X End-user Configuration Tool opens. The HostID tab is the open tab.
2. Scroll to the Server HostId and Windows product HostID information section.

   The Server HostID and Windows product HostID information displayed is the machine-specific information that is required to activate the Tricerat license.

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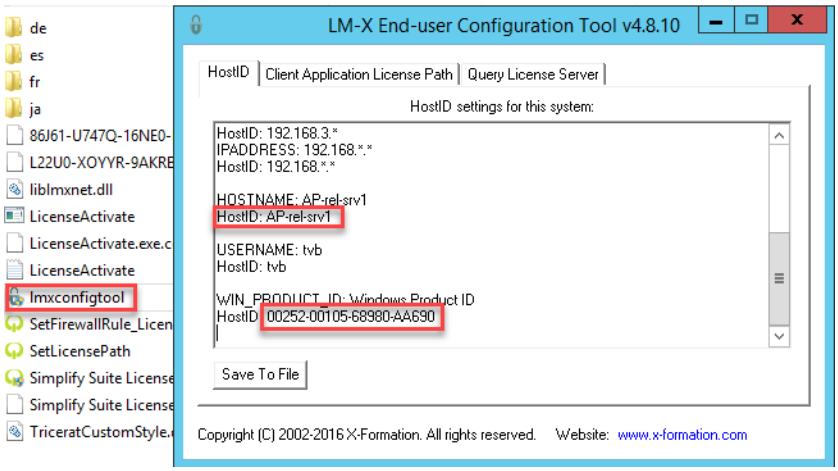
*In Figure 2-1 below, the Server HostID is AP-rel-srv1 and the Windows product HostID is 00252-00105-68980-AA690.*

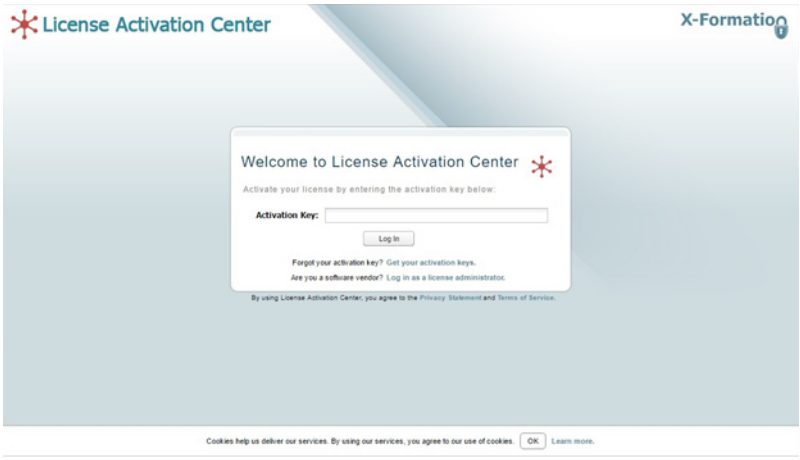
*Figure 2-1: LM-X End-user Configuration Tool, main window*




3. Log on to a client that has internet connectivity, and in a browser of your choice, enter the following URL: https://license.x-formation.com.

   The License Activation Center opens. The Welcome page is the open page. See Figure 2-2 on page 23.

*Figure 2-2: License Activation Center, Welcome page*




*If the page that opens does not look exactly like that shown in Figure 2-2 above, look for the text shown in Figure 2-3 below, and then click the link in the text to open the License Activation Center.*

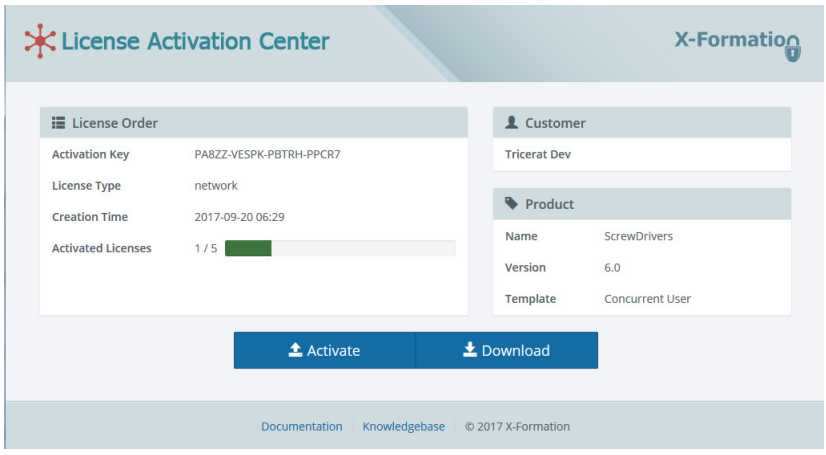
*Figure 2-3: Alternate text to open License Activation Center page*

Are you downloading a software license? Enter your activation key to get your license.

4. In the Activation Key field, enter the license activation key that Tricerat provided to you, and then click Log In.

   The License Information page opens.

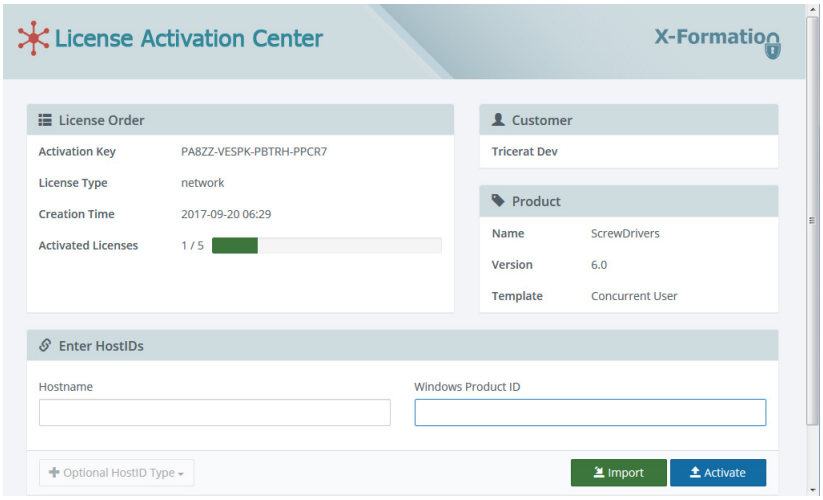
*Figure 2-4: License Activation Center, License Information page*



5. Click Activate

   The License Activation page opens. The page contains an option for entering the HostID for the host server and the Windows product HostID.

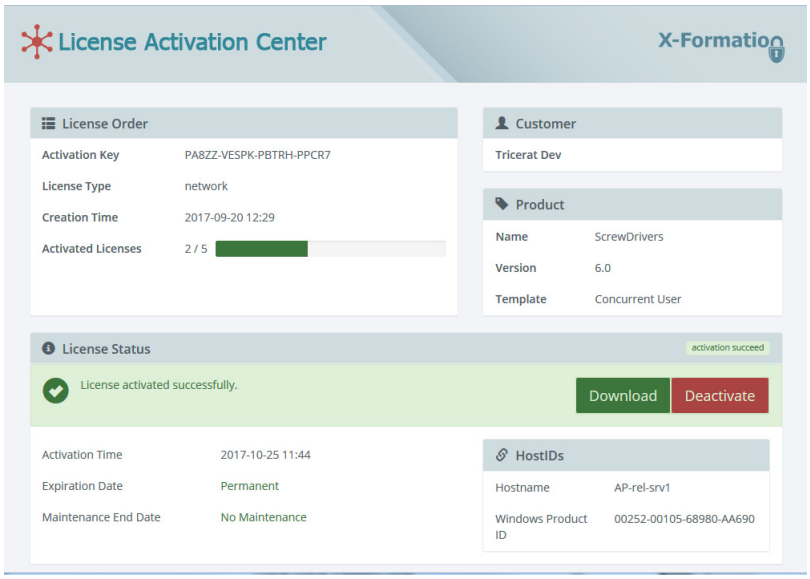
*Figure 2-5: License Activation Center, License Activation page*




6. In the Hostname field, enter the HostID for the host server and in the Windows Product ID field, enter the Windows product HostID (both values that you determined in Step 1), and then click Activate.

   The License Download page opens. The message that the license was successfully activated is displayed in the License Status pane at the bottom of the page.

*Figure 2-6: License Download page*



7. Click Download.

   The activated license is downloaded to your client.

8. Copy the downloaded license to the same directory in which you located lmxconfigtool.exe.
9. Open the Tricerat Licensing Administration Console.
10. To restart the license service and read the new license file, click Restart.
11. From the Activation tab, open the Status sub-tab and verify that the license was correctly read.

# Changing Tricerat Licensing Options

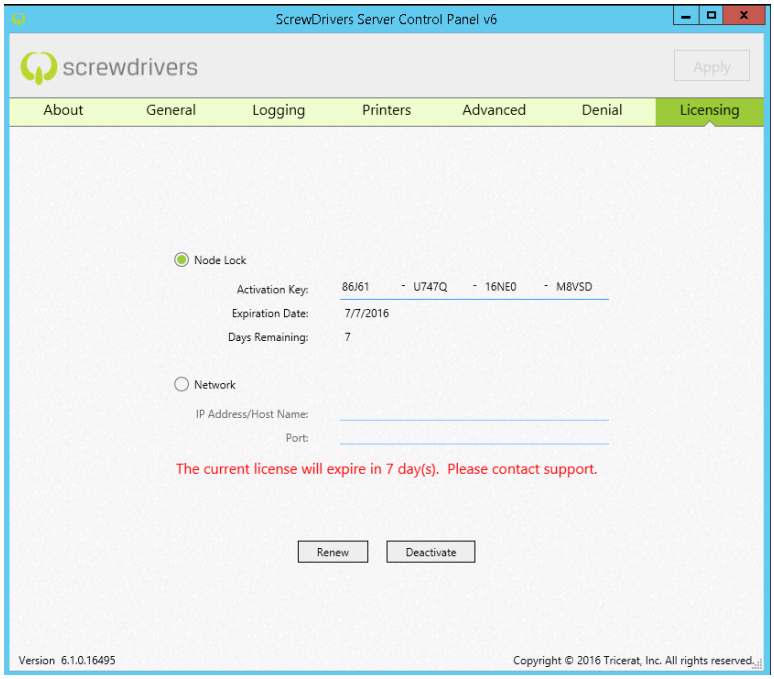
Because ScrewDrivers, Simplify Suite, and Simplify Scanning all use the Tricerat LMX licensing technology, you can use the Tricerat Licensing Utility to change either the licensing mode or licensing parameters for these three products.

## ScrewDrivers licensing options

ScrewDrivers licensing options are found on the Licensing tab on the ScrewDrivers Server Control Panel.

*For information about the ScrewDrivers Server control applet, see the ScrewDrivers Administrator Guide.*

*Figure 2-7: ScrewDrivers Server control applet, Licensing tab*




## Simplify Suite and Simplify Scanning licensing options

The Simplify Suite and the Simplify Scanning licensing options are available through the Licensing Utility that is available from the Start menu of the machine on which the Simplify Suite Server or Simplify Scanning Server is installed. Click this option to open the Simplify Suite License tool, where you can change the Simplify Suite or Simplify Scanning licensing options. See Figure 2-8 and Figure 2-9 on page 27.

*The licensing tool is named Simplify Suite Licensing Utility for both Simplify Suite and Simplify Scanning.*

*Figure 2-8: Simplify Scanning Licensing Utility Start menu option*

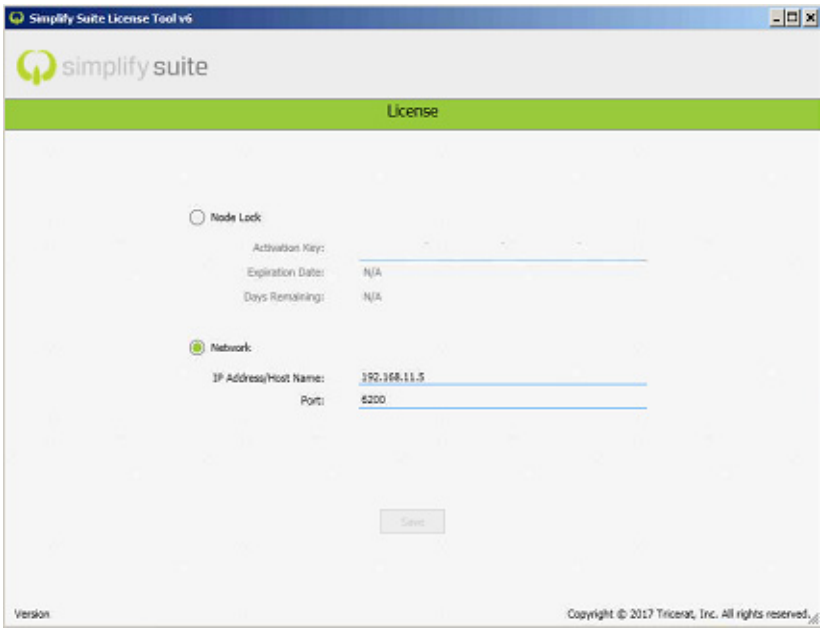



*Figure 2-9: Simplify Suite Licensing tool (Applicable for both Simplify Suite and Simplify Scanning)*