Operations Portal
Getting Started
This is the *Getting Started* guide to the ETAS License Portal. This document is an introduction to terminology and concepts, and a basic primer on tasks you can perform with the ETAS License Portal. It is meant for use by software customers to allow them to track and manage their license assets with the ETAS License Portal.

This manual will take you through entitlement management and license management.

- **Chapter 1, “Introduction,”** discusses fundamental concepts and logging in to the ETAS License Portal.
- **Chapter 2, “Managing Entitlements,”** explains entitlements, licenses, and activation.
- **Chapter 3, “Managing Licenses,”** discusses post-activation support for licenses.
- **Chapter 4, “Basic Concepts,”** provides a glossary for users who are new to ETAS electronic licensing.

Technical Support is available to customers with current support contracts. Please include the following information with your inquiry:

- Product Name and Version
- Activation ID
- Operating System Name and Version

Contact the support center for your area:

1. Introduction
You can use the ETAS License Portal to create and manage licenses:

- Generation and tracking of software licenses
- Transparency of license terms, such as maintenance expiry dates
- Flexible login capacity
- Support for several license-related transactions, both before and after license generation, such as viewing and printing entitlements, and rehosting licenses
The ETAS License Portal will offer you many benefits for your daily work:

- Free license deployment staff by using the ETAS License Portal for:
  - Activation
  - Return
  - Rehost
  - Consolidation
- Experience speedy delivery of licenses.
- Reduce reliance on publisher’s support staff in favour of self-service.
- Experience ease of use instead of complicated activations.
Operations Portal
Introduction – Login

Portal users could be employees and tool coordinators at enterprise customers of ETAS Software.

You can log in to the Customer Portal by using

- **Activation ID** → will allow you to see and manage this one activation (e.g. for a user who is given the information by a tool coordinator to allow him/her to activate one license)

- **Entitlement ID** → will allow you to see and manage all activations in the entitlement (e.g. for a company with only one entitlement)

- **Username and Password** → will allow you to see and manage all activations in all the entitlements assigned to your account (e.g. for a tool coordinator responsible for several entitlements)

⇒ You are, of course, free to use whichever method suits you best at the moment!
Operations Portal
Introduction – Create an Account

For login through user name and password, you need to create an account first:

- Go to ‘New User?’ and enter your data
- A valid Activation ID or Entitlement ID is required as first authorization
- Password will be mailed immediately

Please do not use your e-mail address as user name.

- For next login use user name and password → you will be asked to change password and set a secret question

Do not try to change your password directly on creation of your account – this will cause technical problems!
Operations Portal
Introduction – Language selection

Login with Activation ID or Entitlement ID
→ select on login

Login with e-mail and password
→ set in profile
Operations Portal
Introduction – Map Activations and Entitlements

- In order to add activations or entitlements to your account
  - Go to ‘Manage Entitlements’ and select ‘Map Entitlement and Activation IDs’
  - Enter a valid Activation ID or Entitlement ID → you will now be able to manage the activations you have added
2. Managing Entitlements
The view 'Manage Entitlements' will give you an overview of all line items that still have copies left for activation.

You can see details on Activation ID, Entitlement ID, product, license model, number of copies ...
Operations Portal
Managing Entitlements – View and Manage Activations

• More detailed information on a line item can be gathered when clicking on an Activation ID:

<table>
<thead>
<tr>
<th>Line Item Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entitlement ID</td>
</tr>
<tr>
<td>Activation ID</td>
</tr>
<tr>
<td>Product Name</td>
</tr>
<tr>
<td>Product Version</td>
</tr>
<tr>
<td>Product Description</td>
</tr>
<tr>
<td>Part Number</td>
</tr>
<tr>
<td>Number of Copies</td>
</tr>
<tr>
<td>Remaining copies</td>
</tr>
<tr>
<td>Start Date</td>
</tr>
<tr>
<td>Number of Rehosts</td>
</tr>
<tr>
<td>Number of Returns</td>
</tr>
<tr>
<td>Number of Repairs</td>
</tr>
<tr>
<td>License Model</td>
</tr>
<tr>
<td>Maintenance Expiration</td>
</tr>
</tbody>
</table>
Operations Portal
Managing Entitlements – View and Manage Activations

Please note: This view will only show line items that can be activated!

- No Activation IDs for non-digitally licensed products shown
- No Activation IDs for activated line items shown
  → If you want to see all activations go to ‘Advanced Search’ and set parameter for remaining copies to ‘none’
1. Go to ‘Manage Entitlements’
2. Select an Activation ID and click ‘Activate’
3. Enter data on start date and correct address data if required

Please note:
Do not select a start date in the future if you use the license immediately!
Operations Portal
Managing Entitlements – Activate Licenses (Generate a License Key)

Configure Hosts

4. Configure hosts:
   • Machine named license: a MAC address has to be provided
   • User named license: a server host or server triad as well as a user name as the client ID have to be provided
   • Concurrent license: a server host or server triad has to be provided
5. For Concurrent licenses, you are now asked to define how many of the licenses you wish to activate (for Machine named and User named licenses, there is only one license per activation)
6. Save license to file

7. Exit with 'Complete'
If you activate several licenses in one step (e.g. main product and add-on for the same user) for the same machine/user you can also choose to consolidate the license into one file:

1. Go to ‘Manage Entitlements’
2. Select more than one Activation ID and activate ➔ Select ‘Yes’ when asked whether you want to consolidate the licenses
3. Complete activation as described before
Operations Portal
Managing Entitlements – Upgrades

Activations derived from product upgrades:

• If your licenses are covered by a valid maintenance contract, you can receive product upgrades. Upgrading from one major version to another (e.g. from INCA V6.x.x to INCA V7.x.x) will require the generation of a fresh license key as the keys are bound to the product version.

• When the upgrade is performed, ETAS will create a new activation to provide a license for the new product version. As this line item usually refers to an existing fulfillment, its behavior on activation is different from that of a newly bought item:
  • You cannot activate more than one line item at a time.
  • You have to enter the same Host ID as for the parent fulfillment, otherwise the old license has to be returned or rehosted first (as this would effectively be a rehost).

• Such line items can be distinguished through a special icon: 🚀
Operations Portal
Managing Entitlements – Upgrades

1. Select the Activation ID and click ‘Activate’

Activations that result from an upgrade can be distinguished by the upgrade icon

2. Check data and click ‘Next’ to continue
Operations Portal
Managing Entitlements – Upgrades

3. Enter Host and click ‘Next’ to continue
Operations Portal
Managing Entitlements – Upgrades Case 1

If no key for the parent activation has been generated:

4. Choose ‘Activate’
   → ‘Total Remaining Copies’ will be >0
5. Continue as usual
Operations Portal
Managing Entitlements – Upgrades Case 2

If a key for the parent activation has been generated AND you are selecting a different host from that previous activation:

4. If you choose ‘Activate’
   → ‘Total Remaining Copies’ will be 0
   → You will not be able to generate the license

   You have to return or rehost the old license first – then try again

   For details on how to return or rehost licenses see “Managing Licenses”.
If a key for the parent activation has been generated AND you are selecting a different host from that previous activation:

If you select ‘Upgrade’ you will get an error message.
Operations Portal
Managing Entitlements – Upgrades Case 3

If a key for the parent activation has been generated AND you are selecting the same host as for the previous activation:

4. If you choose 'Upgrade'
   → Parent Activation ID will appear

5. Select and click ‘Next’ to continue
Operations Portal
Managing Entitlements – Upgrades Case 3

If a key for the parent activation has been generated AND you are selecting the same host as for the previous activation:

Please note:
For the fulfillment of the parent activation no license file can be saved any more.
3. Managing Licenses
Licenses have a lifecycle that extends beyond activation and fulfillment (license delivery). Different events at your end (e.g. purchase of new machines, crash of a hard disc…) can affect the lifecycle. The following kinds of license change management are supported by the ETAS License Portal:

-Retrieve an exiting license key (e.g. if the old one is lost due to accidental deletion etc.). See “Retrieve License Key” for details.

-Specify a new license server Host ID, a new MAC address or a new Windows User Name for a license (e.g. when you replace a computer or assign a license to another user). See “Rehost” and “Return” for details.

-Consolidate existing licenses into one license file for easier management. See “Consolidation” for details.
Operations Portal
Managing Licenses – View

Please note:

- This view will only show activations for which a license key has already been generated!
- Evaluation licenses are never shown in the portal!
Operations Portal
Managing Licenses – Retrieve License Key

1. Go to ‘Manage Licenses’
2. Select a Fulfillment ID and click ‘Save to File’

Please note:
License keys for inactive fulfillments cannot be saved!
Operations Portal
Managing Licenses – Rehost

• A rehost enables you to specify a new license server Host ID or MAC address for a license. This may be necessitated when you replace a computer.

• A rehosted license has a new Fulfillment ID, but retains the original Activation ID. If only some of the original fulfillments are rehosted (e.g. if you split Concurrent licenses between two servers), a second new fulfillment is generated for the unrehosted copies with the original Activation ID.
Operations Portal
Managing Licenses – Rehost

1. Go to ‘Manage Licenses’
2. Select a Fulfillment ID and click ‘Rehost’
3. Enter the Host ID and confirm with ‘Rehost’
4. Save the license file
Operations Portal
Managing Licenses – Rehost

<table>
<thead>
<tr>
<th>Fulfillments</th>
<th>Return</th>
<th>Rehost</th>
<th>Save to File</th>
<th>Consolidate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Fulfillment ID</td>
<td>Activation ID</td>
<td>Product Description</td>
<td>Product Version</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Machine named license for INCA (base software)</td>
<td>8.0</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Machine named license for INCA (base software)</td>
<td>8.0</td>
</tr>
</tbody>
</table>

The new license key

The rehosted license → obsolete

Please note:
- For obsolete fulfillments no license file can be saved any more.
- Number of rehosts allowed:
  - Concurrent and Machine named: 1/6 months
  - User named: 1/year
You can rehost consolidated licenses:

1. Go to ‘Consolidated Licenses’
2. Select a consolidation and click ‘Rehost’
Operations Portal
Managing Licenses – Return

- A return refers to the process of moving license rights from a user to another user.
- By returning a license the number of available copies in the ETAS License Portal increases by the amount of returned licenses, so a new license key can be generated.
Operations Portal
Managing Licenses – Return

1. Go to ‘Manage Licenses’
2. Select a Fulfillment ID and click ‘Return’
Operations Portal
Managing Licenses – Return

3. Confirm with ‘Return’
After the Return the Activation ID is available again in ‘Manage Entitlements’.

Please note:
For the returned fulfillment no license file can be saved any more.
Return is only allowed for User named licenses, 1/year.
You can consolidate existing licenses:

1. Go to ‘Manage Licenses’
2. Select Licenses
3. Click ‘Consolidate’

Please note:
In order for a consolidation to have only one license file the Server Host ID has to be the same.
Operations Portal
Managing Licenses – View Consolidations

1. Go to ‘Consolidated Licenses’
2. Select a consolidation and click ‘View Fulfillments’ to see licenses contained
4. Basic Concepts
**Entitlements**

- An entitlement represents what you, the customer, have the legal right to use; it is the right to obtain one or more licenses for a product. Think of an entitlement as an account, or a store of rights to use software, from which you can redeem licenses as needed. For example, let’s assume you order 10 concurrent licenses of ETAS’ Software’s product, ASCET Rapid Prototyping Version 6.0.0 You will be issued an entitlement for those 10 copies, specifying the duration of validity. Each entitlement is identified by a unique Entitlement ID, and contains one or more entitlement line items. See “Activations” for details.

**Activations**

- Each entitlement contains a number of entitlement line items that can be activated, i.e. a license can be generated for them. The activations map to a single product, its license terms, the number of copies entitled, and other details needed to generate a license. The activations are uniquely identified by Activation IDs. If an entitlement line item has been activated, the license key for it has been created. The ETAS License Portal will show the activated licenses as fulfillments. See “Fulfillments” for details.
Fulfillments
- Each time a license key is activated, a fulfillment is generated. The fulfillment contains information on the product, the hosts and the date when it was created. It is identified by a unique Fulfillment ID.

Hosts
- In order to activate licenses, information on the hosts has to be entered:
  - Machine named license: a MAC address has to be provided
  - User named license: a server host or server triad as well as a user name have to be provided
  - Concurrent license: a server host or server triad has to be provided
- If this data changes (e.g. due to a change in hardware or users), the license needs to be rehosted. This procedure is described earlier in the manual.

License key
- The license determines how, when, and where you can use a licensed product such as ASCET Rapid Prototyping. Licenses can be stored in digitally-signed, human-readable text files. Licensing that uses such license files is called certificate-based licensing.
License Models

- Machine named (PC Based)
  - License needs to be managed by each user on his/her own
  - License can be carried with the PC
  - Exchanging the PC will require you to generate a new license first
- User named (Server Based)
  - Easy and transparent license management by one server responsible
  - License can be borrowed and carried with the PC
  - License is available on each PC in the network
  - 100% availability for one specific user
- Concurrent (Server Based)
  - Easy and transparent license management by one server responsible
  - License can be borrowed and carried with the PC if enabled
  - License is available on each PC in the network
  - Several users share a fix amount of licenses; availability of a sufficient amount of free licenses is not granted
Consolidating Licenses

- Consolidating licenses will make it easier for you to manage your license files. Possible use cases are
  - A user has licenses both for the main product and the add-on
  - A lot of users have User named licenses which refer to the same server
- Consolidated licenses can be rehosted in one step instead of several separate steps
- You can only consolidate licenses if they have the same MAC address
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