



Licensing the Corporate Modeler Suite
Corporate Modeler



Contents

- 02 Register the Corporate Modeler Suite and get a license key
- 03 What type of license do I need?
- 04 Register a client license for the Corporate Modeler Suite
- 06 Register a server license for the Corporate Modeler Suite
- 08 Re-register a previously licensed copy of Corporate Modeler
- 10 Transfer an Existing Software License
- 11 Appendix A – Authorization ID

Register the Corporate Modeler Suite and get a license key

When you first install the Casewise software you have access to all standard features for **thirty days**, after which **you must install a valid license key** from Casewise to continue using the software. In order to obtain a license key you must firstly register your Casewise software.

Important! Before you can register you will need an Authorization ID (also referred to as an Auth ID). See Appendix A – Authorization ID. If you do not have an Auth ID please Contact Casewise Servicedesk as soon as possible so that we can issue you with one.

Once you have registered the product, a license key will be sent to you by email before your temporary license expires. This license key can then be installed simply by double-clicking it. The license key you receive will only license those features which you have purchased. All other features will become disabled once the built-in temporary license has expired.

Note: All licensing must be done from a client machine, even concurrent licensing where the licenses are held on a server.

What type of license do I need?

There are three license types for Corporate Modeler:

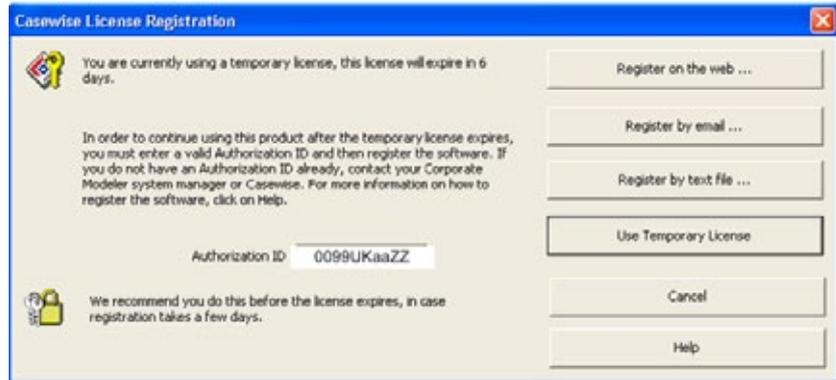
- A **client** license, which can be used on one specific client machine only.
Each client license is only valid for the machine on which you have installed and registered your software. You cannot install a client license key on a different machine from the one where you registered your software. If you do not have a central repository - i.e. a Corporate Exchange database on a server - then you can only use a client license.
- A **concurrent** license (sometimes referred to in non-Casewise software products as a “floating license”), which can be used by any client machine connected to the Corporate Exchange server where the concurrent license is stored.
A concurrent license offers more flexibility because client machines connected to the server do not need individual licenses and therefore you do not need to register each client machine separately. You register once and the concurrent license you receive back will then be valid for all correctly configured client machines.
- A **named-user** license works the same way as a concurrent license except that it needs to be allocated to Corporate Modeler users via the License Manager accessible from the Corporate Modeler Suite.

Note: if your users access the Corporate Modeler Suite via **Terminal Services** then you must install a concurrent or named license. You request a license from, and install the license from Casewise on the Terminal Server machine where you have installed the Corporate Modeler client software.



Register a client license for the Corporate Modeler Suite

1. Run Corporate Modeler.



The Corporate Modeler Suite Logon dialog opens.

2. Enter the default username: **ADMIN** (no password required)
3. Click **Logon**.
If your copy of the Corporate Modeler Suite is not already registered, the Casewise License Registration dialog opens.
4. Enter your Authorization ID (see Appendix A – Authorization ID).
When you have entered a valid Authorization ID the three Register buttons are enabled
5. Click one of the following buttons:

➤ **Register on the web...**

Click this button to open a registration form. Its completion sends a registration

request to Casewise servicedesk automatically via the Internet. Use this option if you have Internet access but do not have a compatible email client (such as Microsoft Outlook) on your machine.

➤ **Register by email...**

Click this button to open a registration form. Its completion sends an email registration request to Casewise. For this option to work you must have a compatible email client - such as Microsoft Outlook - on your machine.

➤ **Register by text file...**

Click this button to open a registration form. When you have completed the form your details are saved as a text file on your machine. You can use this option if you do not have Internet or email access on your machine, in which case you must copy the saved text file to another machine having email access so that it can be sent to servicedesk@casewise.com.

*Note: The **Use Temporary License** button enables you to continue using the product for thirty days to give you time to register the software and install the license sent back to you from Casewise.*

Required Information	
Name	Administrator
Company	Casewise
Phone Number	
Email Address	
Machine Identifier / Asset Number	PROJECTX
Modeler Version	Corporate Modeler Suite Version 2008.1 (August 2008)
Your license ID	C8tgnuhubawh2:9wqf9gnhuatgn767d
Auth ID	0099UKaeZZ
License Type	Client
Licensed Features	
Comments	

Optional Information	
<input checked="" type="checkbox"/> Windows Version	Windows NT/2000/XP/.NET Server, Version : 5.1 Build 2600, Service Pack : Service
<input type="checkbox"/> MS Office Version	Not Available
<input checked="" type="checkbox"/> Internet Explorer Version	(c:\program files\internet explorer\iexplore.exe) Version 6.0.2900.2180
<input checked="" type="checkbox"/> Microsoft Data Access Version	(c:\program files\common files\system\ado\msado15.dll) Version 2.81.1117.0

6. Complete the registration details page
7. Click **OK**

If you choose to register by text file... a dialog opens to confirm that the text file has been created, where it is located and where you should email it to. Click **OK**, then email the file to servicedesk@casewise.com.

Whichever of the three registration methods (web/email/text file) you choose, the Casewise Servicedesk will send back a license key file as an email attachment - usually

the same day but certainly within a couple of working days. When you first install the Casewise software you have access to all standard features for thirty days, after which you must install a valid license to continue using the software.

When you receive your license key file:

1. Transfer it to the Corporate Modeler client machine from where you submitted your registration request
2. Double-click [license file].cws.
Your Corporate Modeler client is now licensed.

Register a server license for the Corporate Modeler Suite

Concurrent and Named-User licenses are registered by the System Manager using an additional software product known as the License Manager.

A concurrent license enables a set number of users to simultaneously use the Corporate Modeler Suite and access objects stored in a database on a dedicated central server (Corporate Exchange).

A Named-User license enables a specific user to use the Corporate Modeler Suite and access objects stored in a database on a dedicated central server (Corporate Exchange).

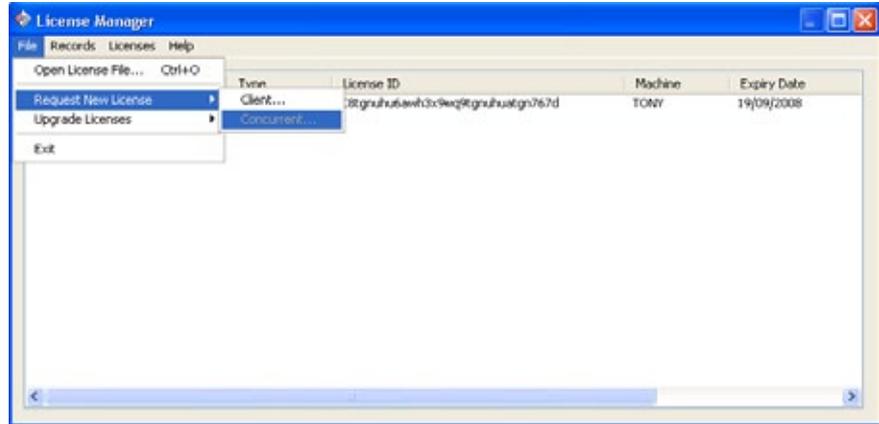
Request a new concurrent or named license from a Corporate Modeler Suite workstation:

1. On the Programs tab of the Corporate Modeler Suite Start Here page click **Admin Tools**
2. Click **License Manager**.
The Corporate Modeler Suite Logon dialog opens.
3. Log on with your Corporate Modeler User Name and Password.
If you don't have a User Name and Password you may be able to use the default:
User Name = **ADMIN** and leave the Password blank

4. In License Manager, Click **File > Request New License > Concurrent** or **Named...**

The Licensing dialog opens.

*Note : if you have not yet configured your Corporate Exchange connection then the **Concurrent** and **Named** option will be disabled*



5. Enter your unique Auth ID (see *Appendix A – Authorization ID*)
The field **Your license ID** now displays a 32 character value starting with either “S” (non-Terminal Servers) or “T” (Terminal Servers)
6. Click one of the three **Register** buttons
7. Complete the form and click **OK**
Your license will be sent to you by email.

Install your concurrent or named license from a Corporate Modeler Suite workstation:

1. Double-click on the License File (suffixed .cws).
A message appears informing you that your license has been successfully installed.
2. Run Corporate Modeler.

Once you have installed your **concurrent** license your users will be able to use the Corporate Modeler Suite, provided that they can connect to the Corporate

Exchange server. However, once the maximum number of simultaneous users has been reached no more users will be able to log on until an existing user logs off.

Once you have installed your **named-user** license, you must allocate its functionality to selected users) please see the License Mmanager help on “Allocate a licence to a names-user”)

Re-register a previously licensed copy of Corporate Modeler

There are two scenarios in which you will need to re-register your copy of Corporate Modeler:

1. Your temporary license has expired.
This scenario includes the case where more than thirty days have elapsed since you first installed the product, but you have not yet licensed it, which means that you can no longer use it
2. You are upgrading from the previous version of Corporate Modeler
Once you have re-registered the product and purchased a license, a license key will be sent to you by email.

***Note :** All licensing must be done from a client machine - even concurrent or named licensing (where the licenses are held on a server).*

Re-register a client license for Corporate Modeler

1. Run Corporate Modeler
The Corporate Modeler Suite Logon dialog opens.
2. Enter your User Name and Password
3. Click **Logon**
The Casewise Re-registration dialog opens. If you previously had a license and it has expired then you might not need to re-enter your Authorization ID, in which case the field will not display and the three Register buttons will already be enabled
4. Enter your Authorization ID (see Appendix A – Authorization ID) if necessary
5. Click one of the following buttons:
 - **Register on the web...**
Click this button to open a registration form. Its completion sends a registration request to the Casewise Servicedesk automatically via the Internet. Use this option if you have Internet access but do not have a compatible email client (such as Microsoft Outlook) on your machine.
 - **Register by email...**
Click this button to open a registration form. Its completion sends an email

registration request to the Casewise Servicedesk. For this option to work you must have a compatible email client - such as Microsoft Outlook - on your machine.

➤ **Register by text file...**

Click this button to open a registration form. When you have completed the form your details are saved as a text file on your machine. You can use this option if you do not have Internet or email access on your machine, in which case you must copy the saved text file to another machine having email access so that it can be sent to servicedesk@casewise.com.

6. Complete the registration details page

7. Click **OK**

If you choose to register by text file... a dialog opens to confirm that the text file has been created, where it is located and where you should email it to. Click OK, then email the file to servicedesk@casewise.com.

Whichever of the three registration methods (web/email/text file) you choose, the Casewise Servicedesk will send back a license key file as an email attachment - usually the same day but certainly within a couple of working days.

When you receive your license key file:

1. Transfer it to the Corporate Modeler client machine from where you submitted your registration request.
2. Double-click [license file].cws.

Your Corporate Modeler client is now licensed.

Re-register a concurrent or Named-User license for Corporate Modeler

The procedure is the same as for registering a **concurrent or Named-User** license for the first time.

Transfer an Existing Software License

Client licenses are machine specific. Therefore any user who gets a new machine, or who has Windows upgraded or re-installed might need to have their current software license transferred.

Concurrent or **Named** licenses in **non-Terminal Server** environments are stored on the Corporate Exchange server - i.e. the machine where your Corporate Modeler database is located. In this case, if a user acquires a new client machine then no license transfer is necessary.

However, if you re-install or upgrade Windows on a **Terminal Server** then you will need to request a replacement concurrent or named-user license because that is the machine on which your Corporate Modeler client is installed.

How do I transfer a license?

1. On the original machine: Remove **all** Casewise software.
2. On the new machine: Install Casewise software.
3. Register the software, as described in the section above.

Note: *When transferring a Corporate Modeler Suite license it would be very helpful to Casewise for you to add a comment giving the license ID, the machine identifier or the name of the user from the old machine, and saying what has happened to the old machine, e.g. re-formatted, software removed etc. Thank you.*

1 Appendix A – Authorization ID

An Authorization ID is a unique 10 character code for use only by your organization in order that you may register your copy of the Casewise software. It is not a license key.

The Authorization ID is created by Casewise and corresponds to which features - and how many of each - that you are entitled to license. It could apply to one user, or - if your organization has purchased multiple licenses - to many users.

If you do not have an Authorization ID, you must contact your Casewise representative or our Service Desk. You cannot register your software unless you enter a valid Authorization ID.

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