# Workgroup Floating License Management Guide


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# Introduction

## Prerequisites

This document assumes the following steps have already been taken:

- OLicense-server is installed and running
- The workgroup floating license has been uploaded to the server

These steps are described in detail in the "OLicense-Server Quick Start Guide" document. Please contact ENSOFT Support at support@ensoftcorp.com if you do not have a copy of this document.

All management for the license is done through the OLicense-Server Browser Frontend, which can be accessed by either of these methods:

1. From the OLicense-Server-Control application, select the "Start/Stop" tab, then click on "Open Browser Frontend".
2. In a web browser, type "http://<machine>:<port>" in the address bar, where <machine> is the host name of the server, and <port> is the port that OLicense is running on. Example: "http://my-server:8080".

Note that the browser frontend is only accessible when the server is running.

Unless otherwise specified, instructions in later sections of this document use the Browser Frontend home page as the starting point for the instructions.

## Using this document

The term client is used frequently throughout this document. A *client* is either a user or a machine, depending on whether the license is a named-user or node-locked license. The client is identified by their credentials, which for users is a user/email combination, and for machines is a machine identifier such as a host ID or UUID.

This document provides a quick overview for managing floating licenses using OLicense-server. More information about the OLicense-server management interface can also be found in the OLicense Server Manual, which is accessible from the OLicense Server Control panel.

## How workgroup floating licenses work

A workgroup floating license is a license type that is designed to allow a small product group easily share a single license across the entire group. The license has the following properties:

- It is a *floating license*, meaning that while many different clients can use the license, only one client at a time can be using the license simultaneously
- It is *active client-limited*, meaning that the number of clients that are allowed to be actively using the license is limited

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- It is designed to require *minimal administration*. The license server automatically maintains a client list, so it is not necessary to reconfigure the license when clients leave or join the group. However, the license administrator can still edit the client list by hand as necessary.

Here are some more details about the active client limitation. A single workgroup floating license has an active client capacity of 10, meaning up to 10 active clients can access the license at any given time. A client is considered to be *active* if they have checked out the license within the past 30 days. After the 30 days, the client becomes *inactive*, and will be dropped from the list if their spot is needed to support a new client. License administrators may *lock* the active status of a client to prevent them from going inactive after the 30 days, for example to ensure an infrequent but important client stays on the list.

When multiple workgroup floating licenses are purchased, the licenses will be combined to form a shared pool. A single floating license can be used concurrently by a single client, with an active clients capacity of 10. But if five floating licenses are purchased, for example, then we will deliver a license that allows up to five clients to use the license concurrently, with an active clients capacity of 50.

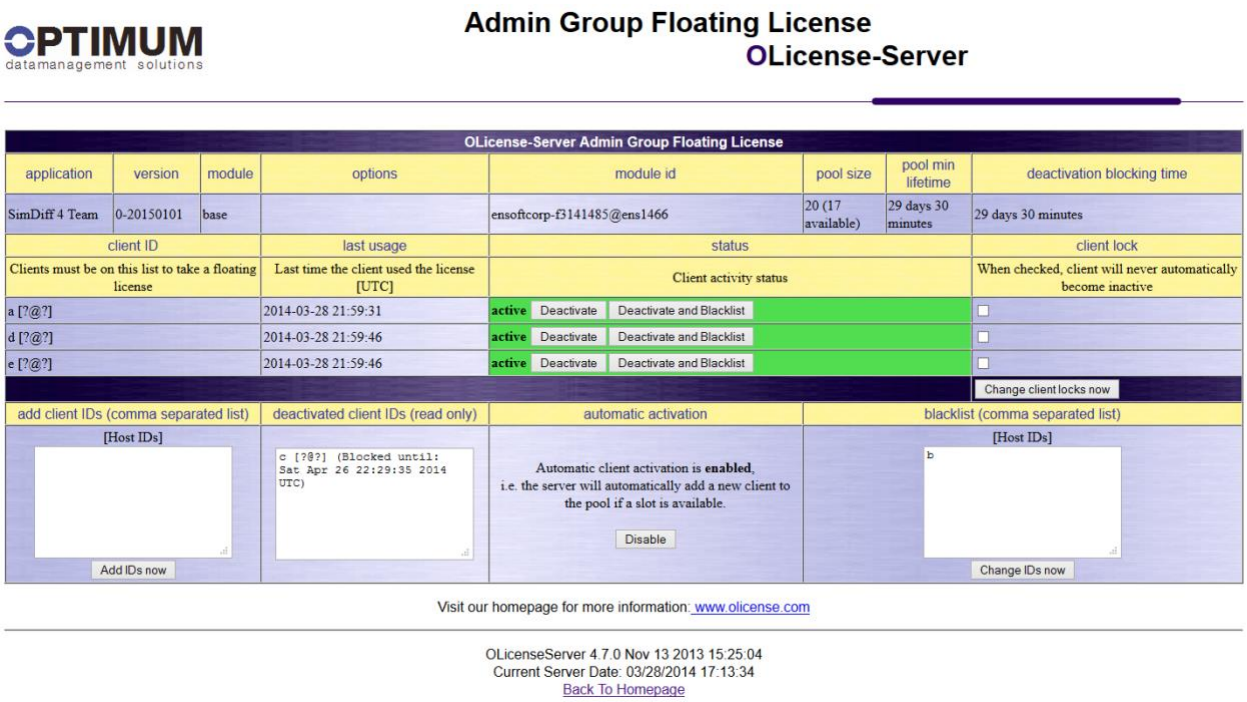
The license server will only provide a client with the license if they are on the clients list. By default, the license server will always attempt to add new clients to the clients list. However, this feature can be disabled, so that only clients that are already present on the client list will be allowed to acquire the license. This is useful for example if your server will be accessible on the corporate network, and you want to ensure that only members of your product group will be able to acquire the license.

Once the client list fills up, the server will no longer accept new clients until an active client becomes inactive, making their spot available. Since a client is considered active for 30 days, this can take some time. To work around this, license administrators can *deactivate* a client. Deactivating a client moves them from the client list to a special, read-only deactivated clients list, where they will remain for 30 days. Clients on the deactivated clients list are not allowed to acquire the license, even if they would normally be allowed to do so.

License administrators can also edit a client blacklist. Clients on the blacklist are never allowed to activate, even if they would normally be able to do so.

Here is a screenshot of the administration interface for working with workgroup floating licenses:

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## Setup Input Delimiters

Beginning with OLicense-Server 4.8.2, a new setting is available in the Server-INI-File called '-inputDelimiters'. This setting determines which characters will be used as delimiters in text boxes that accept multiple inputs, such as the Add Client IDs text box and the Blacklist text box.

By default, carriage return (\r), line feed (\n), comma, and semicolon will all be treated as delimiters. Since SimDiff uses the semicolon character in its specification for named user client IDs, it is highly recommended to eliminate semicolon as a delimiter. If this is not done, then it will not be possible to input a named user client ID into the Add Client and Blacklist text boxes.

To remove semicolon as a delimiter:
1) Open the OLicense-Server-Control application with administrative privileges
2) Switch to the Server-INI-File tab
3) Modify or add the "-inputDelimiters" property. Remove the "//" at start and ";" at end so it looks like this:

-inputDelimiters=\r\n,

Note that if the server is already running when you complete the above steps, you will need to restart it by using Stop Local and Start Local for a local process, or Stop Service and Start Service for a service in the Start/Stop tab.

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# Common Tasks

The following subsections give specific instructions for completing common license administration tasks.

## Determine how many floats are currently in use

This information can be found on the "View Licenses" page.

1. From the home page, click the "View Licenses" button.
2. Locate the row for the license
3. Locate the sixth column, titled "floating (in use)". The total number of floats is listed first, then in parenthesis, the number of floats currently in use.

## Determine which clients are currently using a float

1. From the home page, click the "Administer Licenses…" button. Provide the OLicense admin username and password, if prompted
2. Locate the row for the license
3. Locate the column titled "used by". This column will list the current clients of the license.

It may be necessary to enable the "Allow Info" setting first:

1. Locate the column titled "Allow Info", and enable the checkbox
2. Check the "change" checkbox in the first column to mark this license as having a change to be saved
3. Click "Change the selected licenses now" to apply changes

## View the list of active clients

The list of users that can use the float can be viewed from the "Administer Licenses" page.

1. From the home page, click the "Administer Licenses…" button. Provide the OLicense admin username and password, if prompted
2. Locate the row for the license
3. Locate the final column, titled "group pool". The active clients are listed here. A more detailed view can be accessed by clicking the "view details/edit" button

## Disable automatic client activation

By default, if a client who is not a member of the client pool requests the license, the server will automatically attempt to add the client to the client pool if there is room. This feature can be disabled to allow for more control over which clients are allowed to join the pool.

1. From the home page, navigate to the active clients list for the license (see above instructions for 'View the list of active clients')
2. At the bottom of the page, locate the section titled "automatic activation"
3. Press the "Enable/Disable" button to enable or disable automatic activation

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## Manually add a client to the client pool

Clients can be manually added to the pool from the server web interface. When automatic client activation is enabled, clients can be added to the client list either automatically or manually. When automatic client activation is disabled, manual activation is the only way to add a new client to the client list.

1. From the home page, navigate to the active clients list for the license (see above instructions for 'View the list of active clients')
2. At the bottom of the page, locate the section titled "add client IDs"
3. Enter the client IDs to add, as a comma-separated list
4. Press the "Add IDs now" button to add the IDs to the client pool

Some notes about the format for client IDs:

- Format
  - Node-locked: the format is simply the host ID as reported by SimDiff in the License Settings dialog
  - Named-user: the format is a concatenation of the user's login ID and e-mail address, using a semicolon as a separator
  - Examples:

    ```
    ID1#2-1wtt0vjmtuiql3wp0dtbkl8pw
    jdoe;john.doe@acme.com
    ```

  - Note that by default, a semicolon is set as an input delimiter, so you will need to remove it, following the steps listed in "Setup Input Delimiters" section on page 4 above.
- Case-sensitivity
  - Node-locked: client IDs are case-sensitive, and should be entered with the exact case as reported by SimDiff.
  - Named-user: client IDs are *not* case-sensitive, and should be entered *entirely in lower-case*, as shown in the above example.
    - OLicense-server will allow a named-user client IDs with upper-case characters to be added, but the ID will never match any license request from SimDiff, so the ID will be occupying a slot in the client pool unnecessarily.
    - If an invalid named-user client ID is entered by mistake, it can simply be deactivated. The invalid ID will not cause any harm while it is in the deactivation list, and will eventually drop off of that list.

## Deactivate a client to make room for a new client

In some cases, it may be necessary to deactivate an active client in order to make room for a new client. Normally, a new client can only acquire the license if a free slot is available (an empty slot or an inactive client). If the client list is completely filled with active clients, then normally it will not be possible to add a new client until one of the active clients becomes inactive.

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However, the license administrator can 'deactivate' an active client, which immediately removes the client from the client list, and places them instead into a special 'deactivated clients' list. A deactivated client will remain in the deactivated clients list for 30 days, and during this time, they cannot rejoin the client list, even if a free slot is available.

For example, if one team member is permanently leaving the team, and another team member is joining the team to replace them, then the license administrator can deactivate the leaving team member, in order to immediately activate the joining team member.

1. From the home page, click on "Administer Licenses…", and provide the OLicense admin username and password if prompted
2. Locate the row for the license, and the column titled "group pool". Click the "view details/edit" button
3. Locate the row for the client to be deactivated. Click the 'Deactivate' button in the 'Status' column to deactivate the client.
4. If more than one client needs to be deactivated, repeat step 3 for the remaining clients.

Beginning with SimDiff 4.4.7, team members can also deactivate themselves from the client list, through a process called self-deactivation. To self-deactivate, SimDiff must be run with a hidden command-line option. Have the team member open a command prompt in the SimDiff installation directory and run the following command: "simdiff4.exe -olDeactivate".

## Prevent a client from going inactive

Important clients can be locked into the active client list so they will never be removed, even if they have become inactive by not running the software in a long time. The lock can be removed at any time.

1. From the home page, click on "Administer Licenses…", and provide the OLicense admin username and password if prompted
2. Locate the row for the license, and the column titled "group pool". Click the "view details/edit" button
3. Locate the row(s) for the client(s) to be locked. Check the box in the "client lock" column.
4. Click on the "Change client locks now" button at the bottom of the client table to save changes.

## Prevent clients from acquiring a license

It may become necessary to permanently block a client from acquiring a license.

1. From the home page, click on "Administer Licenses…", and provide the OLicense admin username and password if prompted
2. Locate the row for the license, and the column titled "group pool". Click the "view details/edit" button
3. At the bottom of the page, in the "Blacklist" text box, type the credentials for the client or clients to be blocked, separated by a comma. See notes about client ID format above on page 6.
4. Click "Change IDs now" button to apply changes.

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# License Properties Reference

The following subsections provide more information about the various columns, fields, and properties that can be viewed and edited from the 'View License' page, 'Administer Licenses' page, and 'Administer Group Floating License' pages.

## 'View Licenses' page

- **Application** – application the license is valid for (e.g. SimDiff 4 Team)
- **Version** – maintenance expiration date for the license, in form "0-[YYYYMMDD]". The application must have been released before the maintenance expiration date or it won't work with the license.
- **Module** – lists the module for the license. SimDiff does not use multiple modules, and will always use the same module named 'base'.
- **License type** – type of the license model being used. The number in parenthesis is just a numeric identifier for the license type; it is not the number of seats for the license. The license type should be one of the following:
    - *GrpFloating (24)* – Workgroup floating license type (named user or node-locked)
    - *ID_Locked (10)* – Individual user license type (named user or node-locked)
- **Floating (in use)** – the first number is the total number of floats included with the license, and the second number in parenthesis is the number of floats currently in use.
- **Users** and **Hosts** – with individual user license types, displays the credentials for the clients that are allowed to use the license.
- **Expiration** – date that the license expires, and can no longer be used. For perpetual license types, the value will be 'Infinite'. Only subscription licenses should have an expiration date.
- **Licenser** – name of the company that issued the license. Should always be "ENSOFT CORP."
- **Licensee** – name of the company that the license is issued to (your company)
- **License stored** – date the license was loaded on the server
- **Group size / lifetime** – with workgroup floating license types, the first number is the maximum size of the client list, and the second number is the length of time (in seconds) that must elapse before an active client becomes inactive and can be removed from the client list.

## 'Admin Licenses' page

- **Change** – only rows that have this box checked will actually be updated when the "Change the selected licenses now" button is pressed. This is to prevent accidental modification of licenses.
- **Unload** – check this box to remove a license from the server.
- **Enabled** – the license will only be enabled if this box is checked.
- **Allow info** – if this box is checked, OLicense-server will provide the list of clients that are currently using floats to the requesting application. The list of clients using floats is also displayed in the 'used by' column on this page when this column is checked.
- **Application**, **Version, Module, License type**, **Expiration** – same as on the 'View License' page
- **Server ID** – lists the server ID that the license requires. If this ID is not the same as the host license server's ID, then the text will be colored in red.
- **Licensee** – same as on the 'View License' page

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- **Used by** – with 'Allow info' enabled, lists the clients that are currently using a float.
- **Group pool** – lists the active clients in the client list. Also, the floating license details can be viewed and edited by clicking the 'view details/edit' button.

## 'Admin Group Floating License' page

- **Application, Version, Module** – same as on the 'View License' page
- **Pool size** – The first number lists the maximum size of the client list, and the second number lists the number of slots in the client list that are currently 'available' (meaning the slot is empty or the client is inactive).
- **Pool min lifetime** – Lists the length of time that must elapse before an active client becomes inactive and can be removed from the client list.
- **Deactivation blocking time** – Lists the length of time that must elapse before a deactivated client is removed from the deactivated client list and can become active again. Typically is the same as the 'Pool min lifetime'.
- *Client table columns:*
    - **Client ID** – client ID/credentials
    - **Last usage** – lists the last time the client used the license. The client will go inactive when the difference between the current time and the listed time is greater than the 'Pool min lifetime'.
    - **Status** – lists the current status of the client (active or inactive) and provides buttons to deactivate and/or blacklist the client.
    - **Client lock** – if this box is checked, then the client will not become inactive, even if they have exceeded the 'Pool min lifetime'.
- **Add client IDs** – Client IDs can be entered into this text box, separated by a comma, in order to manually add them to the client list
- **Deactivated client IDs** – Clients in this list are deactivated, and cannot use the license until they are removed from this list. Each row of text lists the client ID and the date/time when the client will be removed from the list.
- **Automatic activation** – Lists the current status of automatic client activation, and provides a button to enable or disable it. If automatic activation is enabled, the server will attempt to add new clients to the client list if possible. Otherwise, only clients that are already members of the client list will be allowed to use the license.
- **Blacklist** – Client IDs can be entered into this text box, separated by a comma, to blacklist them from being able to use the license at all.

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