

IDEA Licencing Models

IDEA

IDEA is an application installed on a PC which creates its own proprietary format, free-standing files comparable with the way Excel creates .xlsx spreadsheet files.

Like all free-standing files they can be stored locally or to a mapped drive letter or using a UNC path to a Shared Folder and are subject to normal file permissions. Confusingly IDEA refers to these flat files as Databases.

An optional ODBC driver is supplied so that other applications can directly read these files.

IDEA is a 64 bit application so it requires a 64 bit Windows operating system.

IDEA has its own GUI and cannot be accessed by a Browser.

IDEA is licenced on a subscription basis and will expire and cease to function if the subscription is not renewed.

Licencing Models Available

Standard

One licence per user:

This is the recommended licencing model and should be used if at all possible – it doesn't require any network connectivity but it is also the only licencing model that doesn't support any kind of virtualisation.

Network Concurrent – minimum 3 sessions

Shared licencing:

This licencing model allows users to share licences with the configured number being able to use IDEA at any given moment (i.e. true concurrency). This model can be cost-effective where a relatively large number of relatively infrequent users share a comparatively small number of licences. This has virtualisation support and totally off network working is possible.

Network Virtual – minimum 5 users

One licence per user:

This licencing model is for customers who require virtualisation support. Totally off-network working is not possible.

Network Corporate – minimum 5 users

One licence per user:

This licencing model is for customers who require virtualisation support and totally off-network working.

Site – minimum 100 users

One licence per user – no licence control:

This licencing model is completely unrestricted and controlled solely by contractual agreement. This has virtualisation support and totally off network working is possible. This licencing model is only available for very large deployments.

Standard

IDEA cannot be installed on a virtual machine or any shared environments such as Citrix or Terminal Services.

IDEA installed on Windows 10 can be accessed over a Remote Desktop connection but this will not work if it's installed on a Server class operating system.

This uses a licence that is physically stored on the machine IDEA is installed on. Anyone who can access the IDEA application can use it – there isn't any kind of authentication process.

The customer is issued with an Authorisation Code for the number of licences they have ordered. During installation the Auth Code is entered for the Register process which creates an encrypted licence token on the local hard drive. This is usually achieved over the Internet if this is possible – otherwise it requires some text to be emailed to ideasupport@caseware.co.uk and then some text to enter will be returned by email. This process reduces the number of licences available to the Auth Code by one.

A licence can only be used on one physical machine. To 'move' a licence to a new machine or re-image or replace the disk first requires that the licence is Revoked. This process deletes the licence from the local hard drive and increases the number of licences available to the Auth Code by one. This is usually achieved over the Internet if this is possible – otherwise it requires some text to be emailed to ideasupport@caseware.co.uk and then some text to enter will be returned by email. This process increases the number of licences available to the Auth Code by one.

At the end of the subscription period a new Auth Code is issued and IDEA will automatically renew its licence over the Internet if this is possible. If not, then a manual Renew process needs to be done on each machine with an email exchange of data similar to the Register process.

The Internet access referred to is port 80 and 443 to <https://elicense.caseware.com> and <https://elicense2.caseware.com>

A careful record needs to be kept of the machine-unique Lock Code for each machine IDEA is installed on in order to make the replacement of any lost licences a simple process.

It is the customer's contractual responsibility to ensure that the licences ordered are used on a per individual user basis and are not shared.

Network Concurrent

IDEA can be installed in just about any environment including virtual machines and shared environments such as Citrix or Terminal Services or onto a shared server accessed by Remote Desktop sessions and it may be possible to use other virtualisation technologies although these are not formally supported.

This requires a single instance of Network Licence Server (NLS) which runs as a Windows service. This service controls access to the licence (configured for a fixed number of concurrent sessions) that is physically stored on its local hard drive. The NLS doesn't process or access any data in any way so its resource requirements are negligible. The machine running the NLS must have a fixed I.P. address. IDEA itself must not be installed on the same machine as the NLS. The NLS can't be installed on a Citrix or Terminal Services server.

The customer is issued with an Authorisation Code for the number of concurrent sessions ordered. During installation of the NLS the Auth Code is entered for the Register process which creates an encrypted licence token on the local hard drive. This is usually achieved over the Internet if this is possible – otherwise it requires some text to be emailed to ideasupport@caseware.co.uk and then some text to enter will be returned by email. This process marks the Auth Code as in use and not available for a further install.

The NLS licence can only be used on one machine. To 'move' the NLS to a new machine or re-image or replace the disk first requires that the NLS licence is Revoked. This process deletes the NLS licence from the local hard drive and makes it available to be installed / Registered at a later date. This is usually achieved over the Internet if this is possible – otherwise it requires some text to be emailed to ideasupport@caseware.co.uk and then some text to enter will be returned by email. This process marks the Auth Code as not in use and available for a further install.

At the end of the subscription period a new Auth Code is issued and a manual Renew process needs to be done on the NLS server similar to the Register process.

The Internet access referred to is port 80 and 443 to <https://elicense.caseware.com> and <https://elicense2.caseware.com>

IDEA itself can be freely installed on as many machines as required. The installation of IDEA doesn't require any kind of licence Registration or subsequent licence Revoke or Renew. When IDEA starts it needs to communicate across the network on TCP/IP and UDP port 5093 with the NLS to get permission to function. Anyone who can access the IDEA application can use it as long as communication with the NLS is possible and there is a concurrent session available – there isn't any kind of authentication process. IDEA will usually

only work if it can communicate with the NLS – This means that remote working other than a Citrix type delivery requires network connectivity over something like a VPN.

There is a feature that allows a user to remove one of the shared concurrent sessions and physically store it on the local hard drive of the machine IDEA is executing on. This enables IDEA to work completely off-network for up to 120 days but this does deprive all other users of a concurrent session until it is checked back in. Note – in a Citrix or Terminal Services type environment this option will not achieve anything and may result in lost licences.

The NLS allows a specified number of copies of IDEA to be used at any one time i.e. true concurrency.

Network Virtual and Network Corporate

IDEA can be installed in just about any environment including virtual machines and shared environments such as Citrix or Terminal Services or onto a shared server accessed by Remote Desktop sessions and it may be possible to use other virtualisation technologies although these are not formally supported.

This requires a single instance of Network Licence Server (NLS) which runs as a Windows service. This service controls access to the licence (configured for a fixed number of users) that is physically stored on its local hard drive. The NLS doesn't process or access any data in any way so its resource requirements are negligible. The machine running the NLS must have a fixed I.P. address. IDEA itself must not be installed on the same machine as the NLS. The NLS can't be installed on a Citrix or Terminal Services server.

The customer is issued with an Authorisation Code for the number of users ordered. During installation of the NLS the Auth Code is entered for the Register process which creates an encrypted licence token on the local hard drive. This is usually achieved over the Internet if this is possible – otherwise it requires some text to be emailed to ideasupport@caseware.co.uk and then some text to enter will be returned by email. This process marks the Auth Code as in use and not available for a further install.

The NLS licence can only be used on one machine. To 'move' the NLS to a new machine or re-image or replace the disk first requires that the NLS licence is Revoked. This process deletes the NLS licence from the local hard drive and makes it available to be installed / Registered at a later date. This is usually achieved over the Internet if this is possible – otherwise it requires some text to be emailed to ideasupport@caseware.co.uk and then some text to enter will be returned by email. This process marks the Auth Code as not in use and available for a further install.

At the end of the subscription period a new Auth Code is issued and a manual Renew process needs to be done on the NLS server similar to the Register process.

The Internet access referred to is port 80 and 443 to <https://elicense.caseware.com> and <https://elicense2.caseware.com>

IDEA itself can be freely installed on as many machines as required. The installation of IDEA doesn't require any kind of licence Registration or subsequent licence Revoke or Renew. When IDEA starts it needs to communicate across the network on TCP/IP and UDP port 5093 with the NLS to get permission to function. Anyone who can access the IDEA application can use it as long as communication with the NLS is possible and there is a licence available – there isn't any kind of authentication process. IDEA will only work if it can communicate with the NLS – This means that remote working other than a Citrix type delivery requires network connectivity over something like a VPN.

The Network Corporate licencing model has an additional feature that allows a user to remove their licence from the NLS and physically store it on the local hard drive of the machine IDEA is executing on. This enables IDEA to work completely off-network for up to 120 days. Note – in a Citrix or Terminal Services type environment this option will not achieve anything and may result in lost licences.

It is the customer's contractual responsibility to ensure that the number of individual users never exceeds the configured number and to pay for additional users if they are required.

Site

This model is completely unrestricted – There are no licences, no NLS, no licence Registration, Revoke or Renew.

IDEA can be installed in just about any environment including virtual machines and shared environments such as Citrix or Terminal Services or onto a shared server accessed by Remote Desktop sessions and it may be possible to use other virtualisation technologies although these are not formally supported.

It is the customer's contractual responsibility to ensure that the number of individual users never exceeds the agreed number and to pay for additional users if they are required. If the subscription is not renewed it is the customer's contractual responsibility to ensure that all of copies of IDEA are uninstalled and no longer used in any way.