



## DOCUMENTS 7

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# Licensing Procedures

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# DOCUMENTS licensing

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## Overview

DOCUMENTS 7 uses licensing protection provided by third-party software, HASP SRM, from SafeNet, Inc.

You set up the license server on a server that is accessible by all workstations in the system. This allows up to 250 users to simultaneously use the same license, making DOCUMENTS available anywhere on a network and ensuring that you have the correct features and capacity (credits).

This document describes:

- How a DOCUMENTS license works.
- How to set up the license server.
- How to ensure that workstations are connected to it.
- How to keep track of your license status.
- How to activate, update, move, or cancel a license.
- How to troubleshoot license issues.

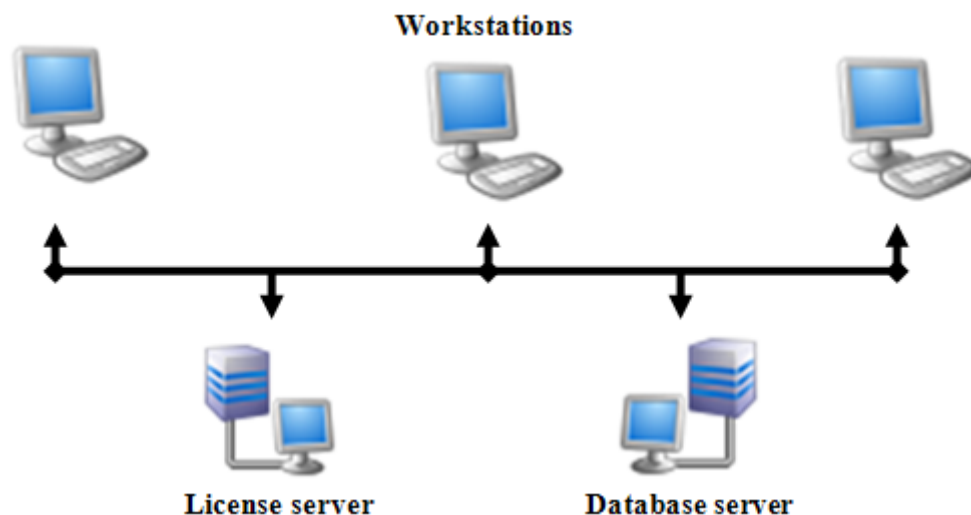
## The license server

The license server includes:

- The DOCUMENTS License Utility – see installation instructions on page 16.

If your setup (for example a demo setup) includes only one workstation, the License Utility is not required. See “Trial licenses and presales licenses” on page 12.

- The Sentinel HASP License Manager service – automatically included when you install the DOCUMENTS License Utility. (This service is also automatically included on workstations when you install DOCUMENTS.)



When everything is working correctly, the license server operates in the background, checking licenses for all users in the system.

## The DOCUMENTS workstations

When DOCUMENTS is first installed on a workstation, it has a [trial license](#) (described on page 12) that can be used until the proper license is installed on the license server and activated.

After that, workstations running DOCUMENTS communicate with the license server using the Sentinel HASP License Manager service. As mentioned above, this service is automatically installed on workstations at the end of the DOCUMENTS installation, where the host name of the license server is normally entered. The license server may also be specified (or changed) later as described in “Specifying a license server on DOCUMENTS workstations” on page 18.

HASP drivers must also be installed on all clients where DOCUMENTS is installed. This is done automatically when you click **Finish** after the DOCUMENTS installation.

When installation is complete and DOCUMENTS is started, the Sentinel HASP License Manager service automatically connects workstations to the license.

## The License Manager service

To clarify: As stated above, the Sentinel HASP License Manager service is installed on the license server and on all DOCUMENTS workstations.

- On workstations, the service looks for and displays licenses that are available in the network – that is, the license server.
- On the license server side, the service allocates licenses and then displays those found on the DOCUMENTS workstations in the network.

## Two types of license keys

There are two types of license keys, described below.

### Software license key

A software license key is tied to a specific workstation using a “fingerprint” that is based on various hardware details.

If the license server is connected to the Internet, activation is almost automatic. You can also activate a software license by email. See page 17.

### Hardware license key (dongle)

If you have a **hardware license key**, simply connect it to a USB port on the license server after server installation is complete.

- ⚠ **Warning:** Do not connect a hardware license key (dongle) until *after* you install the License Utility.



## How the license works

### Processing documents costs “credits”

Each document that is processed in the DOCUMENTS system incurs a certain number of *credits* in the Output activity. How many credits a document “costs” depends on which document specification or layout it was classified with. Each document specification and each layout has an associated cost that is based on its classification and extraction methods, as well as (optionally) data reporting to REPORTER..

### Annual credits and reserve credits

Most DOCUMENTS licenses include a specified number of *annual credits* – credits that are refilled automatically each year while the license is valid.

The license can also include a specified number of *reserve credits* – credits that can be used if the annual credits run out.

Some customers run DOCUMENTS using *only* reserve credits.

Reserve credits are purchased separately, as described in “Updating (renewing) your license, or purchasing more credits” on page 19.

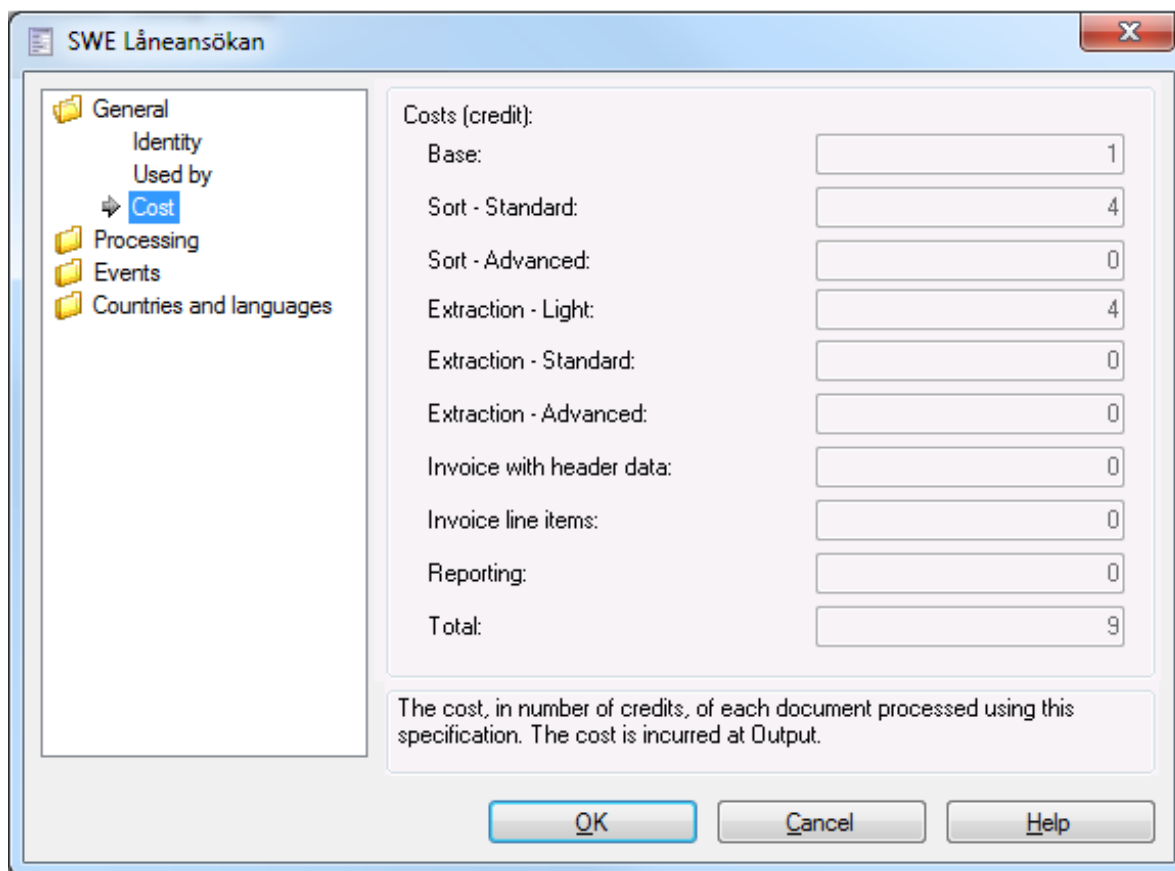
Each time a document is processed in the Output activity, the number of available credits is reduced. DOCUMENTS subtracts the needed credits from those included in the license – first from annual credits and then (when no annual credits are available) from reserve credits.

### Checking how many credits a document costs

As explained above, each document specification and each layout has an associated cost that is based on its classification and extraction methods.

- To see the cost associated with a document specification, view the **Cost** settings in the **Document specification** dialog (properties).
- To see the cost associated with a document layout, open the document specification, right-click the layout, and select **Properties**. If there are page classifiers (this does not include barcode classifiers) or anchor points in the layout, these incur the same cost as **Sort – Standard**. Any classifiers in the document specification do not incur any cost in the layout.

The **Cost** settings in both cases look like this:



### An explanation of the “Cost” settings

<p><b>Base</b></p>	<p>The basic, minimum number of credits that any document costs passing through DOCUMENTS. Barcode separation and classification are included.</p>
<p><b>Sort – Standard</b></p>	<p>Additional “cost” (in credits) for ordinary classification (using automatic methods that are set up manually, such as anchor points, logotypes, or text classifiers).</p> <p>Exception: Barcode classifiers do not trigger this. (They are included in <b>Base</b>.)</p> <p>There is always a <b>Sort – Standard</b> cost if <b>Sort – Advanced</b> is used.</p>
<p><b>Sort – Advanced</b></p>	<p>Additional “cost” (in credits) for the use of self-learning text classifiers. (<b>Use self-learning text classifier</b> is a setting on the <b>Classification</b> tab of the <b>Document specification editor</b>.)</p>



<b>Extraction – Light</b>	<p>Additional “cost” (in credits) incurred by including at least one field to be extracted. Not incurred when all fields are entered manually.</p> <p>There is always an <b>Extraction – Light</b> cost if <b>Extraction – Standard</b> is used.</p>
<b>Extraction – Standard</b>	<p>Additional “cost” (in credits) incurred by including six or more fields to be extracted (that is, <b>Enter data manually</b> is not selected).</p> <p>There is always an <b>Extraction – Standard</b> cost if <b>Extraction – Advanced</b> is used.</p>
<b>Extraction – Advanced</b>	<p>“Cost” (in credits) incurred by including a table field.</p>
<b>Invoice with header data</b>	<p>“Cost” (in credits) incurred by invoice processing.*</p> <p>There is always an <b>Invoice with header data</b> cost if <b>Invoice line items</b> is used.</p>
<b>Invoice line items</b>	<p>Additional “cost” (in credits) incurred by invoice processing with line items.*</p>
<b>Reporting</b>	<p>If REPORTER (a separate ReadSoft product) is installed and activated, each type of <i>invoice</i> costs several more credits.</p>
<b>Total</b>	<p>The total number of credits that each document “costs” at the point of output.</p> <p>Documents that are rejected by the target system do not incur any cost.</p>

\* Invoice processing is triggered by using document templates that are supplied for this purpose.

**i Note:** Extraction fields can be inherited, and this can affect how many credits the documents cost. This applies to both document specifications and layouts.

## Checking how many credits a document costs without opening it

The number of credits that a document costs is also displayed in the **Cost (credit)** column of the **Documents** overview of each solution: On the **Configuration** tab of the Administration module, expand **Solutions** and then the solution you are working with. Then select **Documents**.

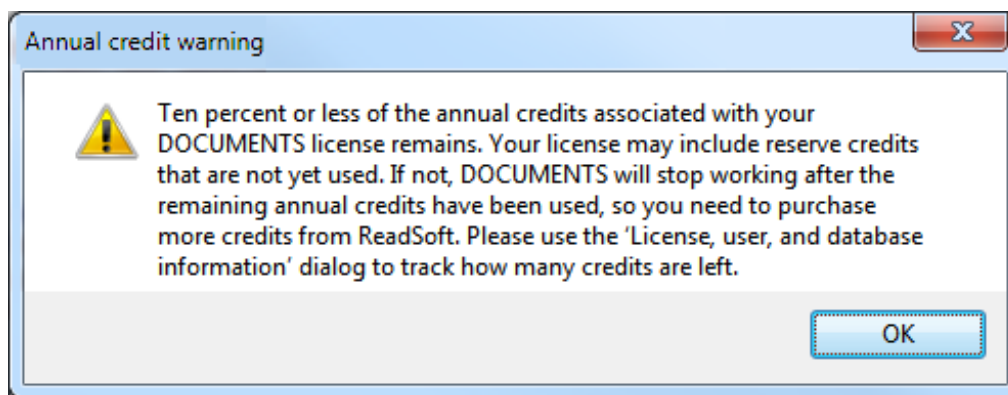
That number shows the cost (in number of credits) of each document that is classified according to that document specification.

- ❗ **Note:** The list does not include layouts. If a document is classified according to a layout (either automatically or manually), the cost of that document is determined by the layout, not the document specification. To see the cost of a layout, you must open the document specification and then access the layout properties, as described on page 7.

## Warning messages alert you when credits are getting low

DOCUMENTS stops working if there are no annual credits or reserve credits left in the license. Error messages are displayed well before this happens, as described below.

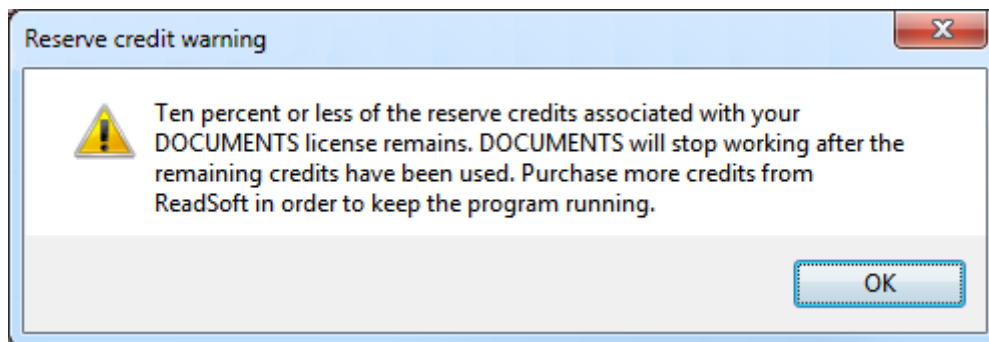
- ❗ **Note:** If you run DOCUMENTS as a Windows service, these messages are found in the Event Log.
- When only 10% of the *annual credits* remain, a warning message is displayed each time you start a DOCUMENTS module, until:
  - the refill date arrives and the annual credits are refilled, or
  - you increase your number of annual credits by upgrading, or
  - the annual credits actually run out and DOCUMENTS has begun using reserve credits.



There is nothing you need to do if the annual refill date is approaching and you still have enough credits (annual credits + reserve credits) to last until that date.

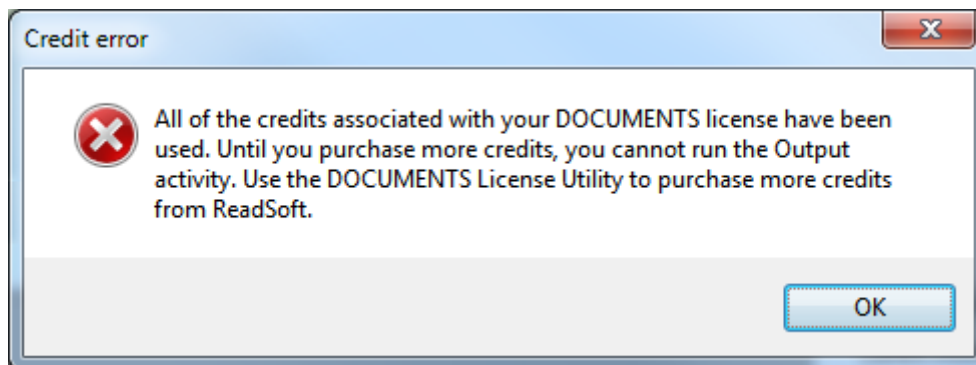
If you are running DOCUMENTS using *only* reserve credits, this message is never displayed.

- When only 10% of the *reserve credits* remain, a warning message is displayed each time you start a DOCUMENTS module, until:
  - you purchase more credits (see page 19), or
  - the annual refill date (if any) is reached and the annual credits are refilled.



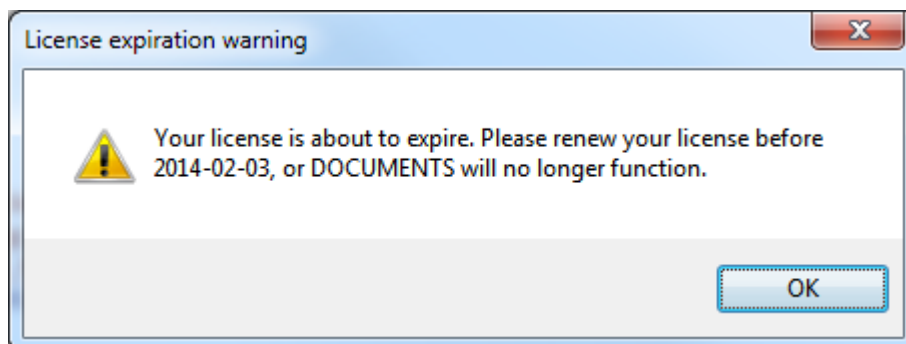
If your license does not include any reserve credits, this message is never displayed.

- When no more credits remain, this message is displayed:



## Warning messages alert you before your license expires

Starting two weeks before a license expires (see **Expiration date** in the dialog described below), warning messages are displayed each time you start a DOCUMENTS module.



At this point you need to renew the license (see page 19). When the license expires, DOCUMENTS can no longer be used, even if credits remain.

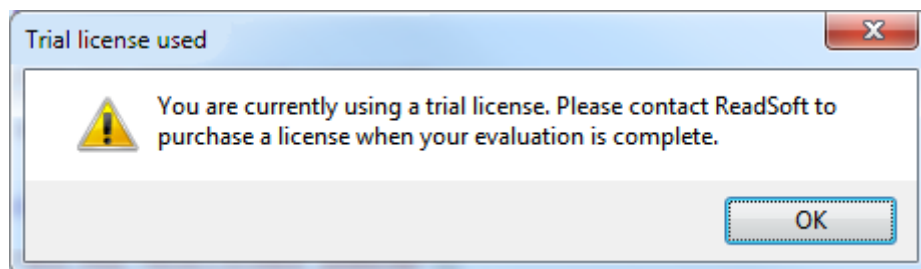
## Trial licenses and presales licenses

### Trial license

When you install DOCUMENTS, by default it has a trial license that can be used locally until you activate a proper license (max. 90 days). The license includes 300,000 reserve credits, and no annual credits. The license is only available on the client PC and cannot be reached over the network.

Until you activate a proper license:

- A warning is displayed each time you log in:



- No license number is displayed in **License information** (see “Keeping track of your license status” below).

You can run DOCUMENTS 7 using the trial license. A warning is displayed each time you start a DOCUMENTS module.

## Presales license

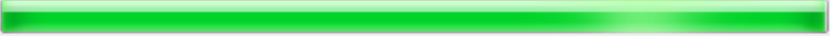
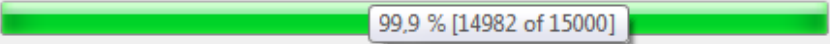
ReadSoft Presales and Partners may be provided with a “presales license.” This is similar to a trial license, except:

- The reserve credits and expiration date can be updated. Contact ReadSoft for details.
- A presales license cannot be converted to a proper license. Instead, you must first cancel the Presales license and then activate the proper license, if needed.

## Keeping track of your license status

As stated previously, DOCUMENTS displays warning messages if credits are running out or if the license is about to expire.

However, you can track the details yourself and check the status at any time:

License information	
License server:	STH-ST
HASP ID:	721234343434
License type:	Normal
License clock:	2011-02-04 11:06:44
License number:	9999
Version:	71
Expiration date:	2014-02-03
Annual credits:	
Reserve credits:	
Annual refill date:	2012-02-03

You can access this information in two places:

- When using DOCUMENTS License Utility, access the **About DOCUMENTS License Utility** dialog by selecting **Help > About**.
- When using the DOCUMENTS Administration or Production module, access the **License, user, and database information** dialog by selecting **Help > About DOCUMENTS**. Then click **License info**.

This table describes what these dialogs tell you about your DOCUMENTS license:

<b>License server</b>	The name of the license server.
<b>HASP ID</b>	The unique ID of your HASP license key.
<b>License type</b>	The type of license (usually <b>Normal</b> ).
<b>License clock</b>	This is the internal “clock” in the license. It is independent of the local time on the computer. This has no practical effect on the license.
<b>License number</b>	The license number assigned by ReadSoft.
<b>Version</b>	The license version. This is not necessarily related to your DOCUMENTS version. However, DOCUMENTS 7 requires license version 71 or later.
<b>Expiration date</b>	Tells you how long the license is valid. When the license expires, DOCUMENTS can no longer be used, even if credits remain.
<b>Annual credits</b>	<p>The bar shows how many annual credits remain, of those that were expected to be needed for your DOCUMENTS installation this year. These credits are refilled automatically on the <b>Annual refill date</b>. If the refill date is approaching, it is therefore natural to have few remaining credits.</p> <p>Hover over the bar with your cursor to see exact numbers.</p>
<b>Reserve credits</b>	<p>The bar shows the proportion of reserve credits that remain, compared to how many were purchased.</p> <p>Hover over the bar with your cursor to see exact numbers. These numbers are reset when you purchase additional reserve credits. For more information, see page 19.</p>
<b>Annual refill date</b>	<p>This is the date when the annual credits are refilled automatically and the <b>Annual credits</b> values are reset. Any remaining annual credits are discarded at this point.</p> <p>This date is set when you activate the license using the DOCUMENTS License Utility. It gives you exactly one year from the moment the license is activated.</p> <p><b>Note:</b> If the annual refill date is after the expiration date, the program will stop working on the expiration date.</p>

## The Admin Control Center

The Admin Control Center is used to view, manage, check, and troubleshoot all license activity. Access it by using a web browser to navigate to <http://localhost:1947/>. You can do this on the license server itself or on any workstation where DOCUMENTS is installed.

# Installing DOCUMENTS License Utility

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Install DOCUMENTS License Utility on a server that is accessible from all DOCUMENTS workstations.

⚠ **Warning:** If you have a hardware license key (dongle), do not connect it until the License Utility installation is complete.

## Using a virtual workstation as a license server

You can use a VMware workstation (or any other form of virtual workstation) as a license server. However, you cannot use a *copy* of the virtual workstation as a license server. This would violate the licensing system.

If you are using a hardware license key and install the License Utility on a virtual workstation, you must configure the virtual workstation to recognize or “see” the USB ports on the physical workstation where the hardware license key is located.

## Installing DOCUMENTS License Utility

1. Exit all Windows programs.
2. Insert the DOCUMENTS installation CD. The installation menu is displayed.

If the installation program does not start automatically, click **Start > Run** and enter `X:\AUTORUN`, where X is the drive letter for the CD-ROM drive.

3. Click **Install Software** and then **DOCUMENTS License Utility**.
4. Follow the on-screen instructions, using the default settings.



# Activating the license

After you set up the license server, you must activate the license.

## Using a hardware license key (dongle)

Connect the dongle to a USB port on the server now. The license is already activated.

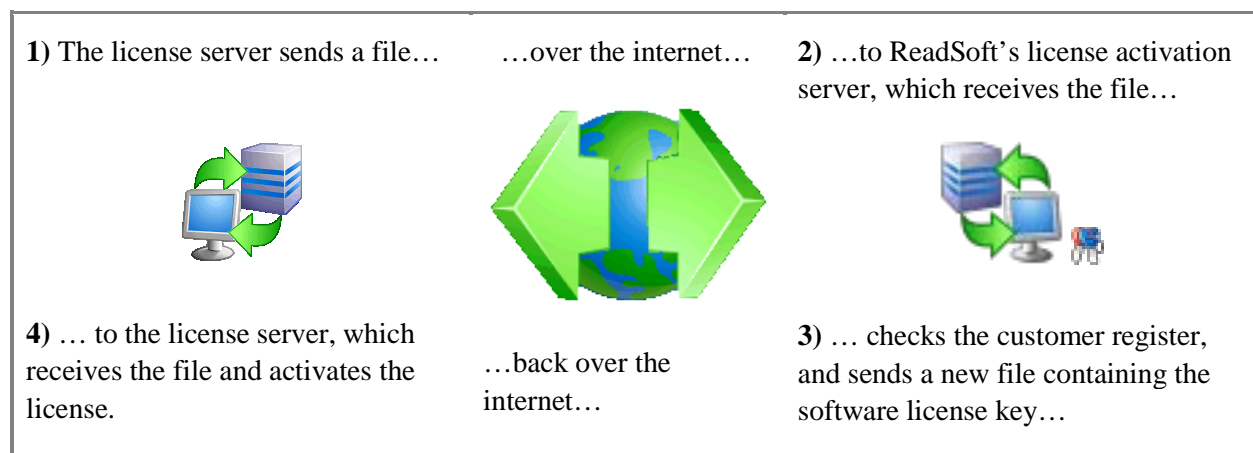


## Using a software license key

Instructions are found in *DOCUMENTS License Utility Help*.

1. Start DOCUMENTS License Utility by selecting **Start menu > All Programs > ReadSoft > DOCUMENTS > DOCUMENTS License Utility > License Utility**.
2. On the **Activate license over the Internet** tab, or on the **Activate license by email** tab, click **Help** for instructions.

The diagram below shows what happens when you activate the license over the Internet:

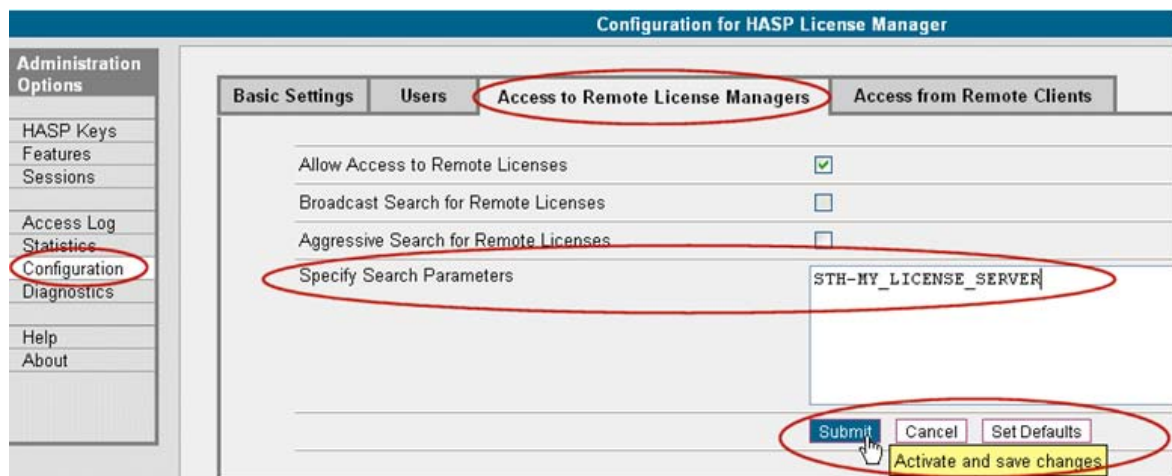


# Specifying a license server on DOCUMENTS workstations

Normally, the license server is set up before the DOCUMENTS workstations, and you can specify the license server in the **DOCUMENTS License Server** dialog that is displayed during DOCUMENTS installation.

You can also specify the license server later. Use this procedure:

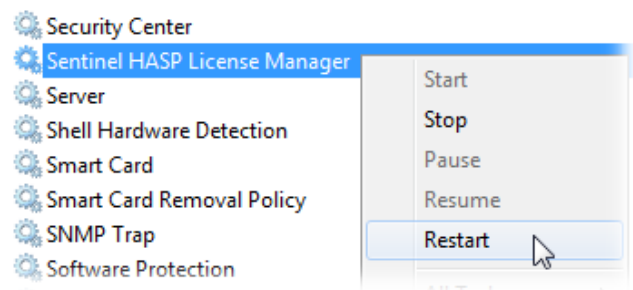
1. After installing DOCUMENTS on a workstation, use a web browser and navigate to the address: <http://localhost:1947/>. The Admin Control Center is displayed.



2. Click **Configuration** in the **Administration Options** menu. The **Configuration for HASP License Manager** page is displayed.
3. Click the **Access to Remote License Managers** tab.
4. In the **Specify Search Parameters** box, specify the name or IP address of the license server. You must specify an IP address if you are part of a Windows workgroup.
5. Click **Submit**.

Stop here if you are on a workstation. Proceed if you are working on the license server.

6. Select **Start** menu > **Control Panel** > **Administrative Tools** > **Services**.

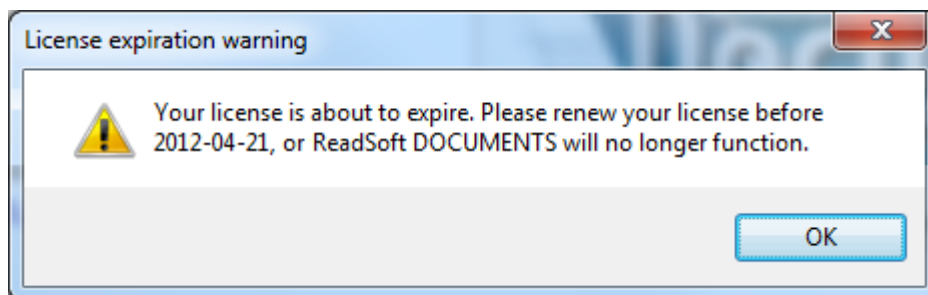


7. Right-click **Sentinel HASP License Manager** and select **Restart**.

# Updating (renewing) your license, or purchasing more credits

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Two weeks before a license expires, the **License expiration warning** dialog is displayed each time a DOCUMENTS module is started.



Warnings are also displayed when your annual credits or reserve credits are about to run out. Then it is time to purchase more credits or increase the number of annual credits.

If you purchase more reserve credits (these are described on page 7), you do not lose any credits that remain. For example, say you originally had 10,000 reserve credits and used 9000 of them. If you hover over the bar in the **About DOCUMENTS License Utility** dialog, you would see "10% [1000 of 10000]" meaning that there are 1000 credits left from the original 10,000. If you purchase 5000 more reserve credits, you now have 6000 reserve credits, and the numbers are reset to "100% [6000 of 6000]."

Another occasion for updating your license is if you are upgrading to a newer version of DOCUMENTS. (Note that you cannot run DOCUMENTS 7 using a license for an earlier version of DOCUMENTS.)

Instructions are found in *DOCUMENTS License Utility Help*.

1. Start DOCUMENTS License Utility by selecting **Start** menu > **All Programs** > **ReadSoft** > **DOCUMENTS** > **DOCUMENTS License Utility** > **License Utility**.
2. On the **Update license** tab, click **Help** for instructions.

# Moving a license

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## If you have a hardware license key (dongle)

1. Install DOCUMENTS License Utility on the new license server. Follow the instructions on page 16.
2. Move the dongle from the old server to the new one.



## If you have a software license

You will need to cancel the old license and obtain a new one for the new location. To avoid interruptions in the operation of DOCUMENTS, obtain and activate the new license first. The procedure is described in detail in *DOCUMENTS License Utility Help*.

- ❗ **Note:** Obtaining a new license means that the credits are reset to the full number of annual credits and/or reserve credits (see explanation on page 7). You may have to pay separately for credits that were used with the original license.
1. Send an email [orders@readsoft.com](mailto:orders@readsoft.com), requesting a license (a new product key or vendor to customer file) for your new DOCUMENTS license server.
  2. Install DOCUMENTS License Utility on the new license server. Follow the instructions on page 16.
  3. When you receive a reply from ReadSoft, activate the new license as described on page 17.
  4. Use Admin Control Center to specify the new license server on DOCUMENTS workstations as described on page 18.
  5. Cancel the old license as described on page 21.

# Canceling a license

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## If you have a hardware license key (dongle)

If you wish to cancel a hardware license, simply return the hardware license key to ReadSoft.



## If you have a software license key

Instructions are found in *DOCUMENTS License Utility Help*.

1. Start DOCUMENTS License Utility by selecting **Start** menu > **All Programs** > **ReadSoft** > **DOCUMENTS** > **DOCUMENTS License Utility** > **License Utility**.
2. On the **Cancel license** tab, click **Help** for instructions.

# Troubleshooting the license server

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## The Admin Control Center (troubleshooting tool)

The Admin Control Center is a web-based service provided in addition to the License Manager. The Admin Control Center is automatically installed both on the license server and on every client workstation. It can be used to view, manage, check, and troubleshoot all license activity. Access it by using a web browser to navigate to <http://localhost:1947/>.

You can use the Admin Control center to specify a license server if you did not do so during installation. See instructions on page 18.

Using the Admin Control Center, you can monitor:

- All the license keys that are currently available on the network server.
- The number of users currently logged in with each key.
- The features to which each key allows access.

In addition, you can make basic configuration changes, such as:

- Setting login timeout and the display refresh time.
- Configuring access permissions from a client workstation to a remote server.

## Errors during installation

If there is a problem with the license driver during installation, you can install the driver manually. The driver is found on the installation CD:

```
X:\Software\Tools & third party software\HASP HL\Install\Runtime  
Environment\Setup.
```

To install the driver manually, run `HASPUserSetup.exe`. Browse to the Admin Control Center on <http://localhost:1947/> and ensure that the page is displayed.

To install the license server driver, navigate on the DOCUMENTS CD to `Software\Tools & third party software\HASP HL\Install\Runtime Environment\cmd Install server` directory and run `haspdinst.exe -i`.

## Problems installing the License Utility using Remote Desktop

If you have trouble installing DOCUMENTS License Utility on a server using Remote Desktop, for example on Windows 2003 servers:

1. End the session.
2. Select **Start** menu > **Run**.
3. At the command prompt, type `mstsc /console` to restart Remote Desktop in console mode.

This enforces the “lower level” connection that is needed to activate the license. If this does not work, you may have to go to the server itself or, for example, through a KVM switch.

## Error messages

### The licensing server cannot be found or the license key does not contain the required feature

- The server may be down. Make sure that the server is running.
  - [Ensure that the HASP service is running](#) (see page 24).
  - Check the hardware license key (dongle) to ensure that it is not physically damaged. If it is, request a new one from your ReadSoft representative.
  - Make sure that **Allow Access to Remote Licenses** is selected on the **Access to Remote License Managers** tab of **Configuration** dialog in the Admin Control Center.
  - If the license server still is not found, select **Broadcast Search for Remote Licenses** (also on the **Access to Remote License Managers** tab of **Configuration** dialog in the Admin Control Center).
  - If this does not work, select **Aggressive Search for Remote Licenses** (also on the **Access to Remote License Managers** tab of **Configuration** dialog in the Admin Control Center).
  - If multiple domains are available, or you are part of a Windows workgroup, you may need to [specify the license server](#) (see page 18). You must specify an IP address if you are part of a Windows workgroup.
- Note:** It takes 2-3 minutes for configuration changes to take effect.

## There is no hardware license key connected to the license server

A hardware license key (dongle) contains your licensing information. Connect the dongle that you received from ReadSoft to a USB port on the license server.

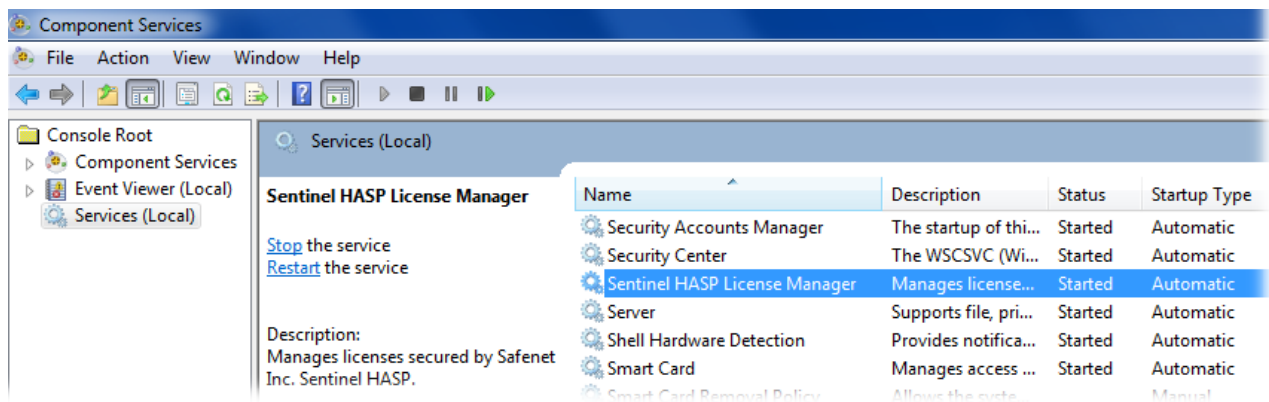
## Credits running out, or license expiring

These warning messages, and what to do about them, are described on page 10.

## Other issues

### Ensuring that the License Manager service is running on both clients and the server




1. Select **Start** menu > **Control Panel** > **Administrative Tools** > **Services**.
2. In the list of services that is displayed, find **Sentinel HASP License Manager** and check the value in the **Status** column.
3. If the status is not **Started**, right-click **Sentinel HASP License Manager** and select **Start**.





## Displaying license key status and features

1. Using a web browser, navigate to <http://localhost:1947/>. The web page that is displayed is the Admin Control Center.
2. Click **HASP Keys** in the **Administration Options** menu.

Administration Options		#	Location	Vendor ID	HASP Key ID	Key Type	Version	Sessions	Actions
HASP Keys		1	<a href="#">sth-license</a>	80085	517172311	HASP HL NetTime 10 	3.21	2	<input type="checkbox"/> browse   <input type="checkbox"/> NetFeatures
Features		2	Local	80085	305079385208265186	HASP SL 	1.10	-	<input type="checkbox"/> Sessions   <input type="checkbox"/> Features
Sessions		3	<a href="#">sth-intsupport1</a>	80085	461149402916	HASP SL 	1.10	-	<input type="checkbox"/> browse   <input type="checkbox"/> NetFeatures

- Ensure that there is at least one HASP SL **Key type** at the **Local Location** (if you are at the license server). This is the key that is updated with the correct license using DOCUMENTS License Utility.
- To see the features included in the license, click **Features** in the **Actions** column. If you have not activated the key, there are usually only three features present. An activated key has many more features.

## The License Utility is installed on the wrong PC

An inactive license is included during installation of DOCUMENTS License Utility. This inactive license is then activated later using a valid hardware or software license key.

If DOCUMENTS License Utility is subsequently installed on a second workstation, the inactive license will cause problems when the Sentinel HASP License Manager service running on workstations tries to locate a valid license.

To identify and connect to the activated license:

1. On the license server, or on any workstation where DOCUMENTS is installed, use a web browser to navigate to <http://localhost:1947/>.
2. Click **HASP Keys** in the **Administration Options** menu.
3. In the **Location** column, locate the name of the license server. (Workstation keys are labeled “Local” and are only present if the server and utility were installed on the same workstation as DOCUMENTS.)
4. Write down the license number that you see in the **HASP Key ID** column.

5. On the workstation where the server and utility were incorrectly installed, use Windows Explorer to find these two files in the DOCUMENTS Bin folder (C:\Program Files\ReadSoft\DOCUMENTS\Bin in a default installation):
  - RSAdmin.exe.config
  - RSProcess.exe.config
6. Using Notepad or another text editor, open each file and find this row:  
<setting name="HaspId" serializeAs="String">
7. Adjust row after that one so that it includes the license number that you wrote down.  
Example: <value>12345678</value>
8. Save your changes.

## Settings in the RSAdmin and RSPProcess.exe.config files

This information can be used in special situations. For example, ReadSoft Support may instruct you to change something in these files.

```
<Licensing.Properties.Settings>
  <setting name="HaspId" serializeAs="String">
    <value></value>
  </setting>
  <setting name="LogLevel" serializeAs="String">
    <value>None</value>
  </setting>
  <setting name="LogFileName" serializeAs="String">
    <value>RSLicenseManager.log</value>
  </setting>
  <setting name="MaxRetries" serializeAs="String">
    <value>3</value>
  </setting>
  <setting name="RetryDelay" serializeAs="String">
    <value>1000</value>
  </setting>
</Licensing.Properties.Settings>
```

Tag	Preset value	Explanation
HaspId		The HASP ID of the hardware license key used for licensing purposes.
LogLevel	None	'None', 'Normal' or 'Debug'. 'Debug' prints the c2v and v2c values, if applicable. When troubleshooting, change to Normal or Debug. (See <i>DOCUMENTS Help</i> for more information.)
LogFileName	RSLicenseManager.log	The "base" name of the license component log. Will be extended with a numeric value.
MaxRetries	3	The number of retries if a login is denied. If there is a problem with a slow network and many clients, increase this value.
RetryDelay	1000	The delay between each login retry (see above). Normally 1 second (1000 ms). If the network is slow and there are many clients, increase this value.