

Methodology for Introducing a New Licensing Model Into a Traditional Software Environment

Dr. Kevin W King
BASIS International
Chief Information Officer

Overview

- Integrating a new license model into existing products
- Updating and implementing the license model of existing products
- Simplifying licensing logistics
- Implementing a rental model

Considerations for New Licensing

- Understand the corporate reasons for using a new licensing model
- Understand the corporate benefits of the new licensing model
- Understand the customer's perspective of the new licensing model
- Explain the benefits of the new licensing model to the customer from their perspective

Considerations for New Licensing - Continued

- Simplify the customer's interaction with the new licensing model
- Automate the corporate administration and maintenance requirements of the new licensing model
- Review and modify existing licensing policies and procedures to accommodate the new licensing model
- Regularly review the licensing process for methods to simplify the process further

Communicating the Licensing Rationale

- Reduce purposeful and inadvertent piracy potential
- Reduce cost of software products to legitimate customers
- Reduce fines to customers from SBA auditors
- Simplify internal license tracking
- Allow software vendors to concentrate on core software competency

Registration Dialog

License Registration Information

Contact Information

Your contact information is confidential and will only be used to assist BASIS in further identifying your product license.

Company Name:

First Name:

Last Name:

E-mail Address:

Phone:

Include your area or country code

Receive product information

Product License Information

The Serial Number and Authorization Number are provided to you by BASIS and must be typed exactly as shown.

Serial Number:

Auth Number:

Host Name:

Host ID:

User Count:

This is a notebook computer.

< Back Next > Exit Help

Simplify the Registration Process

- Automatic
- Web browser
- E-mail
- Telephone
- Fax

Registration Options

License Registration and Delivery Methods

Automatic Licensing

Register and license automatically [This option requires connection to the Internet]

Registration Method

How do you want to send your license information to BASIS?

Web Browser

Email To:

Telephone

Fax

Other

License Delivery Method

How do you want BASIS to deliver your permanent license?

Web Browser

Email Address:

Fax Number:

Country:

Include your area or country code in the fax number

< Back Next > Cancel Help

Automatic Registration

- Capture registration information
- Use browser settings to traverse firewall
- Make socket connection to port 80
- Send information to licensing CGI script on vendor's Web server
- Run licensing executable on licensee's license manager machine

Automated Licensing Logic

- Ensures that the license is not already installed
- Ensures that the downloaded license file is the correct file for that machine (validates hostid)
- Checks for conflicting licenses by:
 - Scanning the license manager directory
 - Reading all license files for same feature(s)
 - Renaming conflicting files to have an extension of .bak
- Installs the license file into the appropriate directory
 - If the license is a multi-user license, then installs the license into the license manager directory
 - If the license is a single-user license, then installs the license into the appropriate directory

Automated Licensing Logic - Continued

- If the license is a multi-user license and a there is a license manager running, the license manager performs a re-read function in order to obtain a new license file
- If the license is a multi-user license and the license manager is not running, it starts the license manager
- If the license file is a multi-user license and a license manager is not selected, then upon user notification, the executable stops the software, brands it (the license file location written in the executable), and then restarts the software
- Terminates running License Wizard

Web Browser Registration

- Capture registration information
- Send information to licensing CGI script on vendor's Web server
- Web server returns Web page to browser containing license and licensing link to licensing executable
- Licensing options
 - Run licensing executable
 - Save license in temp directory and license manually

Web Browser Automated Response

BASIS Product Licensing - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address x&HostID=0007E9C4FC19&SerialNumber=BBJ000001&LicenseAuthNum=1234567890&LicenseDelivery=browser+EN&ProductInfo=0&ProductEmail=bhipple%40basis.com Go Links

Search Whole site for Select Language

Business Runs on

● About BASIS ● Products ● Application Services Directory ● Sales ● Support ● Events

Home Site Map Help Cool Stuff

Product Licensing

License Model
License Exchange
SAM Fulfillment
Permanent License
Demo/Trial License
Application Licensing
FLEXIm

BASIS Product License Instructions

To **AUTOMATICALLY** install a BASIS license on this Windows 98/Me/NT/2000/XP machine:

1. Click on the following link:
[Install License File on this machine](#)
2. Select the RUN or OPEN option to download and execute a small program (15 KB).

To **MANUALLY** install a BASIS license on any operating system, click on the following link to retrieve the license file:

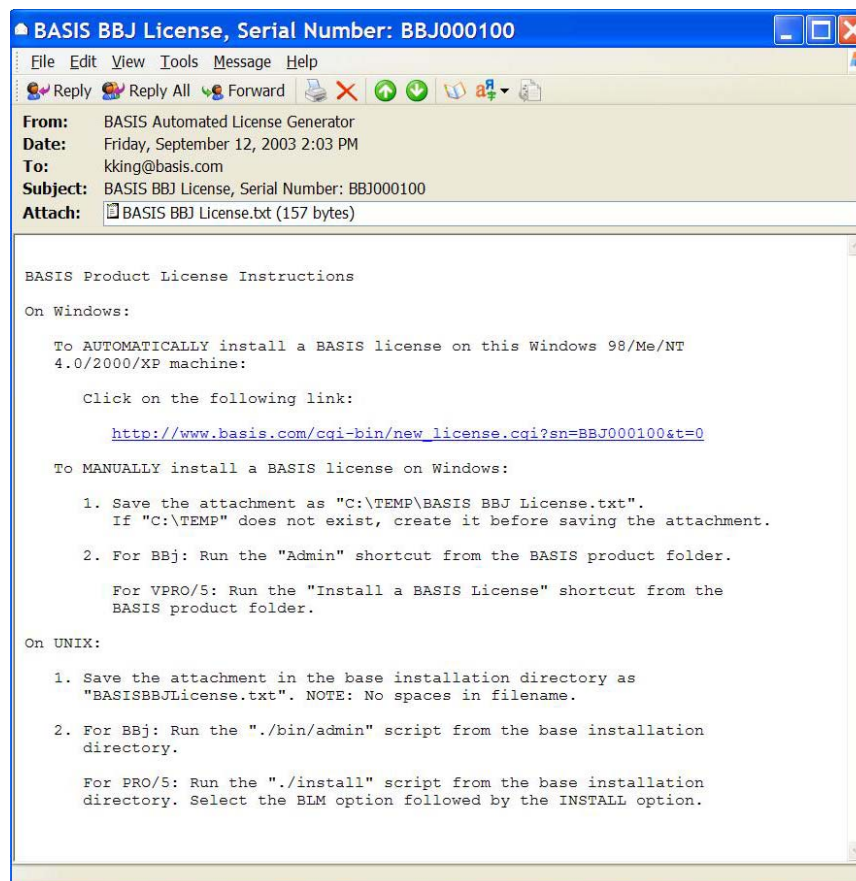
[Retrieve License File](#)

Internet

E-mail Registration

- Capture registration information
- Create e-mail message and send to vendor's licensing e-mail address
- E-mail server processes message and sends e-mail with license attached and link to licensing executable
- Licensing options
 - Run licensing executable
 - Save license in temp directory and license manually

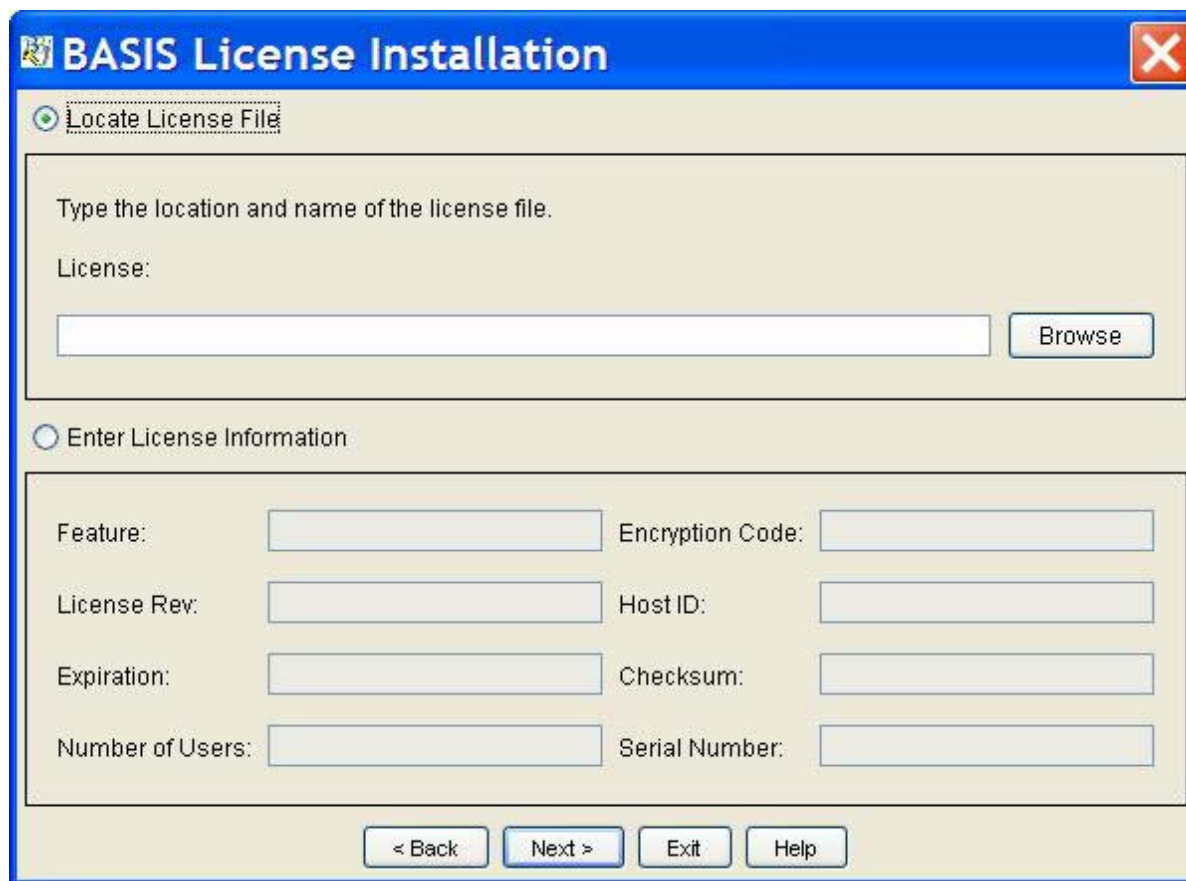
E-mail Automated Response



Telephone Registration

- Capture registration information
- Generate numeric analog for registration information
- Customer calls vendor's IVR and follows prompts to enter numeric analog
- Vendor's automated system processes license request and faxes license information back to licensee
- Licensing options
 - Type license information into licensing wizard
 - Wizard creates valid license from information

License Installation Dialog



The dialog box is titled "BASIS License Installation" and has a close button (X) in the top right corner. It contains two radio buttons for navigation: "Locate License File" (selected) and "Enter License Information".

Locate License File

Type the location and name of the license file.

License:

Enter License Information

| | | | |
|------------------|----------------------|------------------|----------------------|
| Feature: | <input type="text"/> | Encryption Code: | <input type="text"/> |
| License Rev: | <input type="text"/> | Host ID: | <input type="text"/> |
| Expiration: | <input type="text"/> | Checksum: | <input type="text"/> |
| Number of Users: | <input type="text"/> | Serial Number: | <input type="text"/> |

Fax Registration

- Capture registration information
- Print information formatted for OCR process
- Vendor automatically OCRs fax
- Vendor process faxes license information to licensee
- Licensing options
 - Type license information into licensing wizard
 - Wizard creates valid license from information

Rental Model

- Issue license file with expiration date
 - Monthly, quarterly, annually
- Check expiration date from software periodically
- Reregister software as expiration date approaches
- Automatically deliver and install new license if account is current

Rental Model Facilitated by FLEXIm

- FLEXIm Client
 - lc_vsend
- FLEXIm Server
 - ls_vendor_msg
- Invokes registration process from the license manager to relicense software

Summary - Questions

- Integrating new license model into existing products
- Updating and implementing the license model of existing products
- Simplifying licensing logistics
- Implementing a rental model