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# SERENA<sup>®</sup> License Manager<sup>®</sup>

Quick Start for Serena<sup>®</sup> PVCS<sup>®</sup> Professional<sup>™</sup> Suite

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# Before You Begin

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Follow this process to install and set up your License Manager server and get the license keys from Serena that will unlock your Serena product installations. Use the checklist provided at the end of this quick start to ensure you have followed the steps correctly. For in-depth information on licensing, the licensing process, and any product-specific license types, refer to the products' installation guides. Refer to the products' readme files for system requirements.

Before installing the Serena License Manager and getting license keys, you must:

- Have purchased named and/or concurrent licenses or have an existing Support contract. The types of licenses available may vary from product to product.
- Have a valid serial number for the Serena product you are licensing.
- Be registered on the Serena Support Web site (<http://support.serena.com>).

## Upgrading Existing Product Installations

If you have previously installed the Serena License Manager, or if you are upgrading existing installations of Serena products, review the following before you continue:

Upgrade Scenario	Instructions
Upgrading Version Manager to version 8.1.4 or later	Install the current version of the Serena License Manager (2.1.4). You can continue to use your existing Version Manager license keys.
Upgrading Builder to version 6.3.1 or later	Install the current version of the Serena License Manager. You can continue to use your existing Builder license keys.
Upgrading to Serena Business Mashup Suite 2008 or later	Install the current version of the Serena License Manager. You can continue to use your existing TeamTrack license keys.

Upgrade Scenario	Instructions
Installing Serena Business Mashup Suite for the first time and have an existing Tracker 8 installation	Install the current version of the Serena License Manager. You can continue to use your existing Tracker license keys with Serena Business Mashup Suite. Tracker and Business Mashup will share the existing concurrent and named user license keys. However, you must also get server licenses, issue management licenses, and external licenses in accordance with the terms of your agreement with Serena. See the <i>Serena Business Mashup Suite Installation Guide</i> for details.
Continue working with existing installations of Version Manager or Builder that already use a previous version of License Manager	Upgrade License Manager to the latest version in order to take advantage of new features. The existing installations will work with the new version of License Manager.
Upgrading Serena Professional and currently have Professional package licenses	Install the current version of the Serena License Manager. Continue to use your existing package licenses. However, to use Serena Business Mashup Suite, you must also get server licenses, issue management licenses, and external licenses in accordance with the terms of your agreement with Serena. See the <i>Serena Business Mashup Suite Installation Guide</i> for details.

## How to License the Products

### Step 1: Get the Serena License Manager and Product Software from Serena



Get the Serena software either by downloading it (from <http://support.serena.com>) or from a Serena product CD. Downloading is the fastest and least expensive means of obtaining your new software. If you are downloading the software, you need to download the Serena License Manager as well as the other product software you have purchased.

## Step 2: Install the Serena License Manager



Install License Manager on a server that you will use as the licensing server for the Serena products. License Manager setup installs the features required to run License Manager on the server.

If you need licenses for more than one License Manager server either in the same building or across the globe, you need to install License Manager and get the appropriate number of licenses for each location. The licenses are generated for the License Manager server from which you acquired them.

### To Install License Manager on Windows:

If you downloaded the software from the Serena Support site, navigate to the location where you downloaded it. If you are installing from the Serena product CD, launch `<Drive>:\licensemanager\win32\setup.exe`, and follow the on-screen prompts to complete the installation.

### To Install License Manager on UNIX:

- 1 If you downloaded the software from the Serena Support site, navigate to the location where you downloaded it. From the CD, navigate to the setup program by entering  
`cd <cd_root>/licensemanager/unix`
- 2 Run the setup program by entering: `./lminst`
- 3 Enter a location where you want to install the program, and follow the prompts to complete the installation.

## Step 3: Get the License from Serena Web Fulfillment



Use License Manager to get license keys from Serena. You can also obtain the licenses from the Serena Support Website: <http://support.serena.com>.

### To get your product license:

- 1 Open the License Manager tool:
  - On Windows, go to Start | Program Files | Serena | License Manager | License Manager.

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- On UNIX, open the License Manager tool by navigating to where you installed it and running **serenalm**.
  - 2 On the License tab, select the **Connect to the web to get a license key** option, and click the **Get Key(s)** button. The Serena Support login page appears.
  - 3 Enter your login credentials, and follow the steps in the licensing web fulfillment process to obtain the license key.

## Step 4: Enter the Key in License Manager



After getting the key from web fulfillment, copy and paste the key string(s) to the License Manager tool. After you paste in the key, you can set up user IDs for the named licenses and set up notification for licensing issues.

### To set up your product license:

- 1 Return to the License Manager tool.
- 2 Select the option **I have received a license key from Serena**.
- 3 Paste the key(s) in the field available. If you have more than one serial number to license, you can repeat **Step 3** and **Step 4** for each product you want to license.
- 4 Click **Apply**. The License Manager server starts automatically. See the product installation guide to learn how to set License Manager to run as a service.

If you purchased *concurrent licenses*, no additional work is required to set up user IDs. Users check out licenses when they log in to the product. The licenses are checked back in to License Manager when the users log out. Proceed to **Step 5**.

If you purchased *named licenses*, valid user IDs used by the product must be recognized by License Manager before the users can successfully log in.

## ***Setting up user IDs for named licenses***

By default, License Manager automatically assigns licenses to users the first time they log in to the product. You can also manually set up user IDs to match IDs used by the products. Note that user names are not case sensitive.

### **To automatically add users:**

On the Products tab, the **Auto-add user IDs for named licenses** option is set by default. When users log in to the product the first time, their user IDs populate automatically in the User Management list. Multiple licenses may be automatically assigned to the same user name if:

- A user attempts to log in using a name to which a license is already assigned
- The existing license is currently in use on a different system
- Additional named licenses are available

### **To manually add users:**

If you prefer not to use the auto-add feature, you can add the user IDs to License Manager manually. You can assign multiple licenses to the same user name, by entering the same name multiple times.

- 1 On the Products tab, select the product.
- 2 Click the **Manage User IDs** button.
- 3 Click the **Add User(s)** button to add new users. User names are not case sensitive. Repeat for every user you need to add. Click the the **Remove Users(s)** button to remove them.

## ***Setting up notification for licensing issues***

Use the Notification tab to receive an e-mail warning of any compliance issues. You must supply your SMTP server address and e-mail address to get notified of licensing issues by e-mail.

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## Step 5: Install the Serena Product



After you have set up the License Manager server, install the Serena products. During installation, you will be prompted to enter the host name or IP address of the License Manager server. However, for Builder, you are not required to enter the hostname during the installation.

### To set up licenses for Builder:

For the Knowledge Base server: In the LICENSE.INI file, replace "http: / /< NAME\_OF\_MACHINE>" with "@ < NAME\_OF\_LICENSE\_SERVER>".

For the command-line client or remote build server: Edit the value of the MERANT\_LICENSE\_FILE environment variable to point to the Serena License Manager server.

Note that to install a remote build server you will need a remote build server named license. This license is unique to remote build servers, and can be ordered through your Serena sales representative or through web fulfillment. Follow the instructions given in this document for named licenses.

## License Process Checklist

<input type="checkbox"/>	Get License Manager and any other software purchased from Serena.
<input type="checkbox"/>	Install License Manager.
<input type="checkbox"/>	Get the license key string from Serena web fulfillment.
<input type="checkbox"/>	Enter the key string in the License Manager tool. Repeat this step and the previous step if you have more than one serial number to license. For example, you may have one for Version Manager and another for Builder.
<input type="checkbox"/>	Named licenses only: Manually set up user IDs if you do <b>not</b> want to use the auto-add feature to enter user IDs into License Manager.
<input type="checkbox"/>	Set up notification for licensing issues. If notification is enabled and there is a licensing issue, you will receive an e-mail detailing the problem.
<input type="checkbox"/>	Install the Serena product(s).
<input type="checkbox"/>	<p>If necessary, restart the License Manager server:</p> <ul style="list-style-type: none"> <li>■ Windows: Start   Programs   Serena   License Manager   Start License Manager Service</li> <li>■ UNIX / Linux: /usr/serena/license_manager/&lt;os&gt;/start_license_server</li> </ul>

## Getting Help

If you need help during any of the steps in this process:

- Licensing process and procedures are described in the product installation guides.
- Online help is available from the License Manager tool.
- FAQs are supplied on the Serena Support site to answer questions.

