

# Kofax Copitrak License Manager Technical Note

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**KOFAX**

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# Preface

This guide provides instructions for the licensing of the Kofax Copitrak System Server and its embedded terminals.

## System requirements

System requirements are listed in the *Technical Specifications* document, which is available from the [Kofax Copitrak Product Documentation](#) site. The document is updated regularly, and we recommend that you review it carefully before installing your product.

## Related documentation


Product documentation for Kofax Copitrak 3.4.0 is available here:

<https://docshield.kofax.com/Portal/Products/Copitrak/3.4.0-csb5nx1k32/Copitrak.htm>

## Getting help with Kofax products

The [Kofax Knowledge Portal](#) repository contains articles that are updated on a regular basis to keep you informed about Kofax products. We encourage you to use the Knowledge Portal to obtain answers to your product questions.

To access the Kofax Knowledge Portal, go to <https://knowledge.kofax.com>.

 The Kofax Knowledge Portal is optimized for use with Google Chrome, Mozilla Firefox, or Microsoft Edge.

The Kofax Knowledge Portal provides:

- Powerful search capabilities to help you quickly locate the information you need.  
Type your search terms or phrase into the **Search** box, and then click the search icon.
- Product information, configuration details and documentation, including release news.  
To locate articles, go to the Knowledge Portal home page and select the applicable Solution Family for your product, or click the View All Products button.

From the Knowledge Portal home page, you can:

- Access the Kofax Community (for all customers).

On the Resources menu, click the **Community** link.

- Access the Kofax Customer Portal (for eligible customers).  
Go to the [Support Portal Information](#) page and click **Log in to the Customer Portal**.
- Access the Kofax Partner Portal (for eligible partners).  
Go to the [Support Portal Information](#) page and click **Log in to the Partner Portal**.
- Access Kofax support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.  
Go to the [Support Details](#) page and select the appropriate article.

# Overview

From CSS700 Release 2 (R2), a new .LIC file is provided along with the .XPS license files used with earlier versions to support the licensing management service. Use the .LIC license file to manage the licensing for all CSS components, including:

- CSS700 Server Core Services - Billing
- Embedded Eclipse Terminals on eCopy Scan Stations
- Embedded Eclipse Terminals on other desktop computers
- Canon embedded terminals
- All Copitrak embedded terminals managed through DFI web services such as Xerox, Ricoh, HP
- OCR scan licenses

The CSS700 R2 (or higher) installation package includes a generic Aredor license installed. Field technicians are not required to launch Options.exe and enter the information in the .XPS file.

Field technicians are also not required to request individual licenses for embedded terminals and OCR licenses. The License Manager tracks and licenses these components against the .LIC file.

The current licensing management service is also available as a service pack upgrade for existing CSS700 sites.

All license requests will be fulfilled with a current .LIC file along with an older .XPS file. The older .XPS file is supplied for you if you have not upgraded your system to the current CSS License Manager.

## Changes to CSS services and software components

This release modifies the following system components to interact with and support the most current licensing management model.

- CSS Manager: Heads a display of license information and the refresh button to refresh embedded licenses when there is a change to these licenses.
- LCWIN/ESRTDAM: Communicates directly with the new licensing management service.
- DFI web services: Edits device table for the technicians to set up and manage embedded devices. This mainly includes the addition of the embedded type such as Ricoh, Lexmark, Xerox, and so on.
- Scantrak: OCR Licensing.
- G2 Billing.

## Backward compatibility

The new licensing management service is available as a service pack upgrade for existing CSS700 sites. If you do not upgrade your CSS system, both LCWIN and DFI web services are designed to maintain backward compatibility with earlier versions of CSS.

This backward compatibility mode is set by command line switches or INI file configurations.

## .LIC license files

A .LIC file is provided along with the existing .XPS files in earlier versions and contains two sections: a text readable header and an encrypted license. The text readable header is visible by using notepad or using the CSS Manager license status feature.

# Licensing a CSS system

The following sections provides instructions on how to license a CSS system.

## Verify the license status

Before proceeding with the licensing, verify the license status of your CSS system selecting **License Information** from the CSS Manager.

## License a CSS system

Licensing of a CSS700 system has been simplified and only requires that an .LIC file is deposited in the ERS license file folder (ERS\LicenseFiles).

As soon as this file is deposited into the ERS\LicenseFiles folder, the CSS License Manager will detect this file and automatically license the system for one host server.

## Upgrade a CSS license

When you add or remove the components, the order fulfillment group will issue a new license. Upgrading customer licenses can be done by simply dropping the new license in to the ERS\LicenseFiles folder.

The CSS License Manager automatically applies the license with the most current timestamp and ignores the older license files.



# Licensing Eclipse embedded terminals

This section provides information on licensing Eclipse embedded terminals.

## Eclipse simulator

The Eclipse simulator does not require a license. However with the new licensing management model, an Eclipse simulator used for test purposes must be launched and run on the host CSS Server only. If it is run from another computer other than the host, LCWIN will not be able to recognize it as a simulator and will allocate one of the embedded licenses to it. This is a simulation of the existing CSS system architecture and this will be changed in CSS R3.

## License Eclipse embedded terminals on computers

Eclipse embedded terminals running on computers such as eCopy Scan Stations no longer require a separate embedded license. The LCWIN service has been modified to automatically detect these terminals and license their Mac addresses with the license management service.

**i** The LCWIN cannot distinguish between a computer Eclipse embedded terminal and an Eclipse terminal embedded on an eCopy scan station. The license manager sums these licenses together and they will be allocated on a first-come, first-served basis to any computer Eclipse embedded terminal.

# Licensing embedded Copitrak terminals managed by DFI web services

CSS700 embedded terminals are licensed by MFP vendor type, such as Ricoh, Xerox, HP, and so on. You are no longer required to send the MFP's serial number to the order fulfillment group for an embedded license code.

## New License Manager interface

DFI automatically detects and registers a new embedded terminal.

For License Manager to provide an embedded license for an MFP, open the new License Manager interface in the DFI console. To obtain a license, enter a product code for each MFP serial number in the list and click the **Get License** button.

## Reset LCWIN button

The **Reset LCWIN** button clears the LCWIN cache of licenses and the license table will automatically be rebuilt as each device communicates with DFI. This function is useful when removing an MFP and replacing it with the new device that has a different serial number.

## Add MFP button

The **Add MFP** button allows you to set up and configure embedded terminals prior to receiving the devices. This is a useful function when the MFP vendor provides you with a list of devices and their associated serial numbers prior to delivery of the actual MFPs.

## Edit Product Code button

The **Edit Product Codes** button allows you to manually edit the product codes file to add new vendor product codes for new embedded terminals that are not on the list.

More importantly, this button also allows you to set up serial number patterns for auto matching serial numbers to product codes.

## Auto matching of serial numbers to product codes

You can set up a serial number pattern using the **Edit Product Codes** button and when a match is found, the product code is automatically associated and entered for this device. DFI will also automatically retrieve a license from license manager and assign it to this device.

## Trial license

If a license is not available for the added device, it will automatically enter a seven-day trial license period. At the end of the seven-day trial period, the embedded terminal will not be functional until a .LIC file with an appropriate embedded license is deposited in the `ERS\LicenseFiles` folder.

## DFI web services backward compatibility

The DFI web services released in CSS700 R2 (or higher) is fully backward compatible with older versions of CSS and ERS.

DFI auto-senses the version of CSS and ERS installed on the server and configures itself with the appropriate license management scheme. CSS700 R2 (or higher) creates a new registry entry. DFI and LCWIN look for this registry entry and if it is not present, defaults to the older licensing mechanism.

If CSS version 700.2 (or higher) has been installed, the services automatically use the new licensing schema.