

## Studio 5000 License Portal



## Important user information

Read this document and the documents listed in the additional resources section about installation, configuration, and operation of this equipment before you install, configure, operate, or maintain this product. Users are required to familiarize themselves with installation and wiring instructions in addition to requirements of all applicable codes, laws, and standards.

Activities including installation, adjustments, putting into service, use, assembly, disassembly, and maintenance are required to be carried out by suitably trained personnel in accordance with applicable code of practice. If this equipment is used in a manner not specified by the manufacturer, the protection provided by the equipment may be impaired.

If this equipment is used in a manner not specified by the manufacturer, the protection provided by the equipment may be impaired.

In no event will Rockwell Automation, Inc. be responsible or liable for indirect or consequential damages resulting from the use or application of this equipment.

The examples and diagrams in this manual are included solely for illustrative purposes. Because of the many variables and requirements associated with any particular installation, Rockwell Automation, Inc. cannot assume responsibility or liability for actual use based on the examples and diagrams.

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Throughout this manual, when necessary, we use notes to make you aware of safety considerations.



**WARNING:** Identifies information about practices or circumstances that can cause an explosion in a hazardous environment, which may lead to personal injury or death, property damage, or economic loss.



**ATTENTION:** Identifies information about practices or circumstances that can lead to personal injury or death, property damage, or economic loss. Attentions help you identify a hazard, avoid a hazard, and recognize the consequence

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**Important:**

Identifies information that is critical for successful application and understanding of the product.

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Labels may also be on or inside the equipment to provide specific precautions.



**SHOCK HAZARD:** Labels may be on or inside the equipment, for example, a drive or motor, to alert people that dangerous voltage may be present.



**BURN HAZARD:** Labels may be on or inside the equipment, for example, a drive or motor, to alert people that surfaces may reach dangerous temperatures.



**ARC FLASH HAZARD:** Labels may be on or inside the equipment, for example, a motor control center, to alert people to potential Arc Flash. Arc Flash will cause severe injury or death. Wear proper Personal Protective Equipment (PPE). Follow ALL Regulatory requirements for safe work practices and for Personal Protective Equipment (PPE).

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This manual includes new and updated information. Use these reference tables to locate changed information.

Grammatical and editorial style changes are not included in this summary.

### **Global changes**

None in this release.

### **New or enhanced features**

None in this release.

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## Studio 5000 environment

The Studio 5000 Automation Engineering & Design Environment® combines engineering and design elements into a common environment. The first element is the Studio 5000 Logix Designer® application. The Logix Designer application is the rebranding of RSLogix 5000® software and will continue to be the product to program Logix 5000™ controllers for discrete, process, batch, motion, safety, and drive-based solutions.



The Studio 5000® environment is the foundation for the future of Rockwell Automation® engineering design tools and capabilities. The Studio 5000 environment is the one place for design engineers to develop all elements of their control system.

## Additional resources

These documents contain additional information concerning related Rockwell Automation products.

Resource	Description
<a href="#">Industrial Automation Wiring and Grounding Guidelines, publication 1770-4.1</a>	Provides general guidelines for installing a Rockwell Automation industrial system.
Product Certifications webpage, available at <a href="http://ab.rockwellautomation.com">http://ab.rockwellautomation.com</a>	Provides declarations of conformity, certificates, and other certification details.

You can view or download publications at <http://www.rockwellautomation.com/literature>. To order paper copies of technical documentation, contact your local Rockwell Automation distributor or sales representative.

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### End User License Agreement (EULA)

You can view the Rockwell Automation End-User License Agreement ("EULA") by opening the License.rtf file located in your product's install folder on your hard drive.

### Open Source Licenses

The software included in this product contains copyrighted software that is licensed under one or more open source licenses. Copies of those licenses are included with the software. Corresponding Source code for open source packages included in this product are located at their respective web site(s).

Alternately, obtain complete Corresponding Source code by contacting Rockwell Automation via the Contact form on the Rockwell Automation website:

<http://www.rockwellautomation.com/global/about-us/contact/contact.page>

Please include "Open Source" as part of the request text.

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### **Warranty**

This product is warranted in accordance with the product license. The product's performance may be affected by system configuration, the application being performed, operator control, maintenance, and other related factors. Rockwell Automation is not responsible for these intervening factors. The instructions in this document do not cover all the details or variations in the equipment, procedure, or process described, nor do they provide directions for meeting every possible contingency during installation, operation, or maintenance. This product's implementation may vary among users.

This document is current as of the time of release of the product; however, the accompanying software may have changed since the release. Rockwell Automation, Inc. reserves the right to change any information contained in this document or the software at any time without prior notice. It is your responsibility to obtain the most current information available from Rockwell when installing or using this product.



### **Environmental compliance**

Rockwell Automation maintains current product environmental information on its website at

<http://www.rockwellautomation.com/rockwellautomation/about-us/sustainability-ethics/product-environmental-compliance.page>

### **Contact Rockwell Automation**

Customer Support Telephone — 1.440.646.3434

Online Support — <http://www.rockwellautomation.com/support/>

# Create and manage licenses and accounts

## Introduction

This chapter describes how to:

- Create and manage licenses
- Manage license containers
- Manage administrator accounts

## Create licenses

When creating licenses in the License Portal, complete three main steps:

- **Create license types:** Use license types to group the Logix Designer project components that are protected by licenses. For example, you could create license types based on functionality, geography, product, or customer.
- **Create recipient types:** Use recipient types to assign license permissions to user profiles.
- **Create an order:** Create an order to deliver a license ticket to the end user. End users enter the ticket number when they retrieve a license.

### See also

[Create recipient types](#) on [page 14](#)

[Create an order](#) on [page 16](#)

[Create a copy of an order](#) on [page 17](#)

[Cancel an order](#) on [page 19](#)

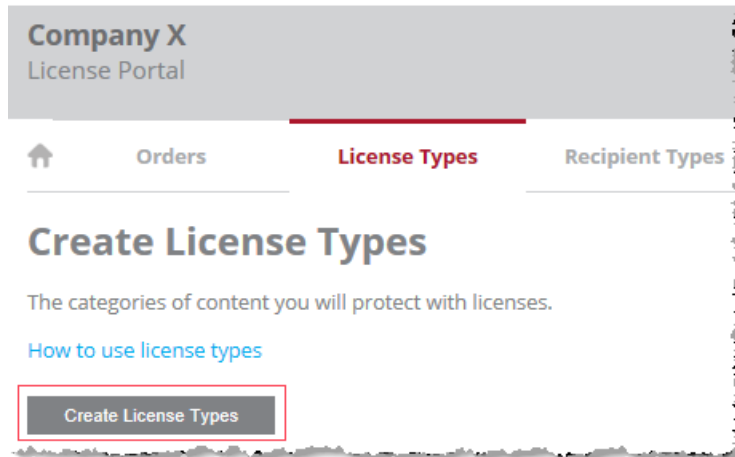
## Create license types

Use license types to categorize the licenses that protect Logix Designer project components. Create license types based on criteria such as functionality, geography, product, or customer. For example, for Customer XYZ, create a license type named Customer\_XYZ and use those licenses to protect components only in Customer XYZ's Logix Designer projects. See the Logix Designer online help for instructions on applying license protection.

Create and edit license types on the **License Types** page, which provides a list of existing license types.

**To create a license type:**

1. On the License Portal **Home** page, select **License Types**.
2. On the **License Types** page, select **Create License Types**.



3. In the **Name** box, type a name for the license type and click **Create**. Each license type requires a unique name that:
  - Contains a maximum of 40 characters.
  - Does not contain spaces.
  - Contains only letters, numbers, or underscores.
  - Does not begin with a number.
  - Does not contain more than one underscore in a row.

The new license type appears in the list of existing license types. The portal assigns each license type a license type number, which consists of the firm code and a product code, separated by a colon.

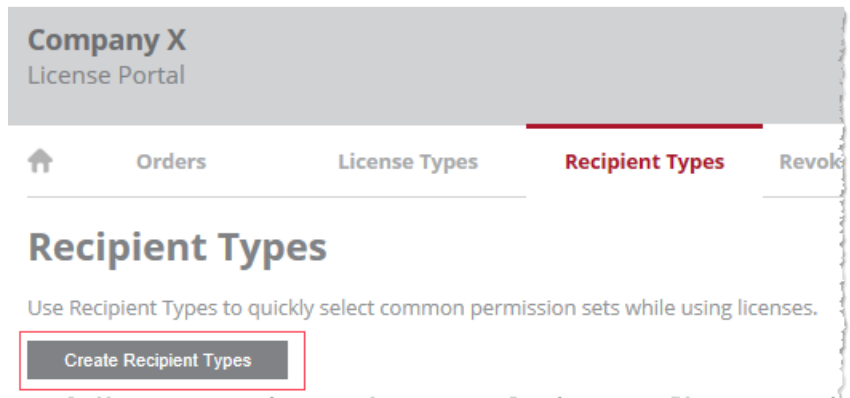
## Create recipient types

Use recipient types to assign permissions to user profiles. Create and edit recipient types on the **Recipient Types** page, which provides a list of existing recipient types and their associated permissions.

**To create a recipient type:**

1. On the License Portal **Home** page, select **Recipient Types**.

2. On the **Recipient Types** page, select **Create Recipient Types**.



3. In the **Name** box, type a name for the recipient type. Each recipient type requires a unique name that:
  - Contains a maximum of 40 characters.
  - Does not contain spaces.
  - Contains only letters, numbers, or underscores.
  - Does not begin with a number.
  - Does not contain more than one underscore in a row.
4. In the **Permissions** area, select the permissions to assign to the license for the recipient type. When selecting a permission, any additional permissions that are required are selected automatically.
  - **Use.** Allows the recipient to open, import, upload, or download a project containing content protected with the corresponding license type. This is the minimum permission available for a license.
  - **View.** Allows the recipient to view routine logic for the component, or local tags for an Add-On Instruction. View also enables printing, searching, and cross reference. Editors and properties dialog boxes for the component are limited to read-only mode.
  - **Edit.** Allows the recipient to edit a routine or Add-On Instruction. When you select **Edit**, **View** is selected automatically.
  - **Copy contents.** Allows the recipient to copy the logic and tags contained in the protected routine or Add-On Instruction. Note that this permission applies only to the contents of the component; the component itself can be copied with or without the license. When you select **Copy contents**, **View** and **Edit** are selected automatically.

- **Protect.** Allows the recipient to apply or remove license protection from components protected by this license type. When you select **Protect**, **View** and **Edit** are selected automatically.
- **Export in clear text.** Allows the recipient to export the routine or Add-On Instruction in a non-encrypted format. When you select **Export in clear text**, **View** is selected automatically.

5. Click **Create**.

#### See also

[Create license types](#) on [page 13](#)

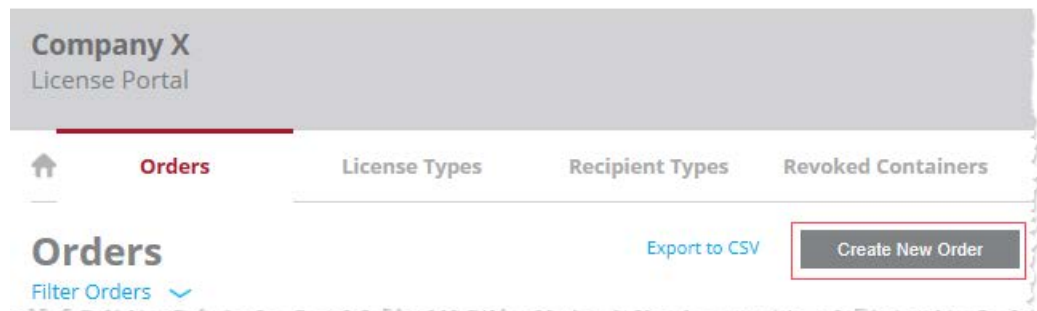
## Create an order

Creating an order, also known as a transaction, generates a license ticket, ticket number, and retrieval URL. The ticket number and retrieval URL are used when a recipient needs to retrieve a license. Once the ticket number is used to retrieve a license, the ticket is marked as used and cannot be entered again to retrieve a license.

Use the **Orders** page to create new orders and see the list of existing orders and their status.

#### To create an order:

1. On the License Portal **Home** page, click **Orders**.
2. On the **Orders** page, click **Create New Order**.



3. (Optional) In the **Name** box, type the name of the license recipient. Names can contain up to 40 characters.
4. (Optional) In the **Company** box, type the name of the recipient's company. Company names can contain up to 40 characters.
5. (Optional) To delete all existing licenses from the recipient's license container when this license is retrieved, select **Remove all previous container contents**.

6. Click **Add license**.
7. Select a license type.
8. Select the permissions to assign to the license, or select a recipient type to assign the permissions contained in that type.
9. (Optional) Select **Allow user over network** to enable the license for network use.

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**Important:** This setting is required if users intend to share the license privileges on a network.

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10. (Optional) Select **License expires on** to set an expiration date for the license. Select a date and time for the expiration.
11. Click **Add**.
12. Click **Finish Order** and review the license configuration.
13. Click **Create Order**.
14. Under **Retrieval Details**, note the **Retrieval URL** and the **Ticket number** for the order. The recipient needs this information to retrieve the license. Select **Email Recipient** to send this information to the recipient in an email.

#### See also

[Cancel an order](#) on [page 19](#)

[Filter the Orders list](#) on [page 20](#)

[Download the Orders list as a CSV file](#) on [page 21](#)

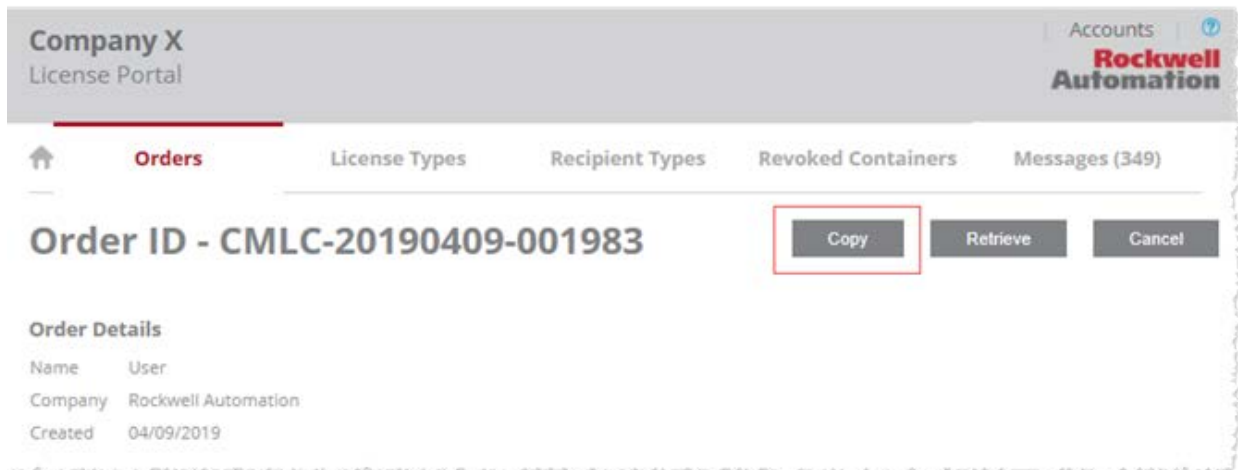
## Create a copy of an order

Make copies of existing orders to save time.

#### To create a copy of an order:

1. On the License Portal **Home** page, select **Orders**.
2. In the list of orders, select the **Order ID** of the order to copy.

- On the **Order details** page, select **Copy**.



- In the **Name** box, type the name of the license recipient. The recipient name can contain up to 40 characters.
- (Optional) In the **Company** box, type the name of the recipient's company. The company name can contain up to 40 characters.
- (Optional) To delete all existing licenses from the recipient's license container when this license is retrieved, select **Remove all previous container contents**.
- (Optional) Select **Add License** to add additional licenses to this order.
- (Optional) Select the pencil icon in the **Edit** column to change other license settings, such as the License Type, Recipient Type, permissions, or license expiration date.
- (Optional) Select the **Delete** icon to delete a license from the order.
- Select **Finish Order** and review the license configuration.
- Select **Create Order**.
- Under **Retrieval Details**, note the **Retrieval URL** and the **Ticket number** for the order. The recipient needs this information to retrieve the license. Select **Email Recipient** to send this information to the recipient in an email.

#### See also

[Create an order](#) on [page 16](#)

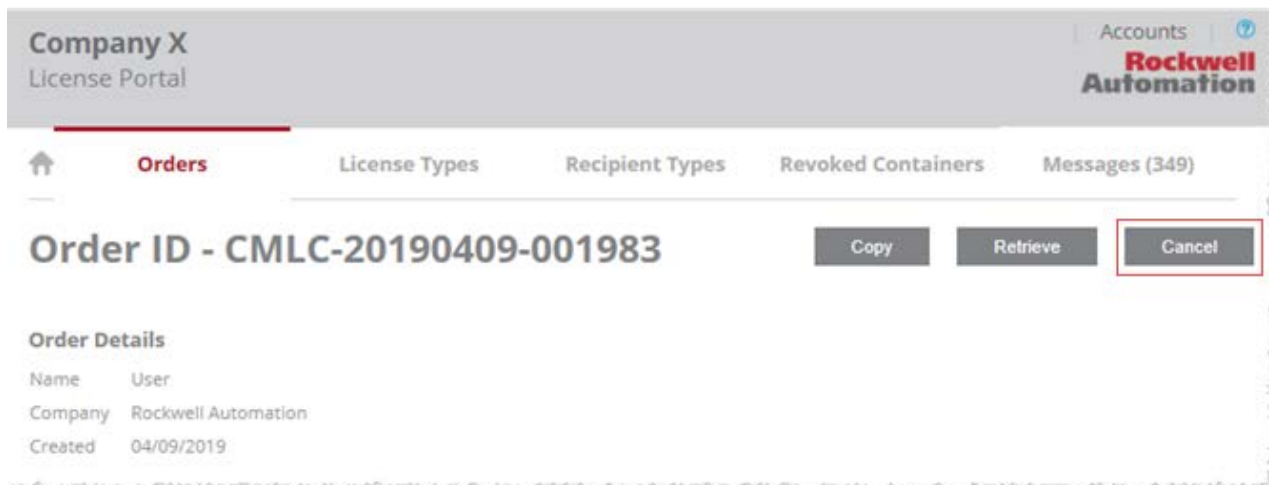
[Filter the Orders list](#) on [page 20](#)

## Cancel an order

Cancel orders that are no longer needed. Orders that have been retrieved cannot be canceled.

### To cancel an order:

1. On the License Portal **Home** page, click **Orders**.
2. In the list of orders, click the **Order ID** of the order you want to cancel.
3. On the **Order details** page, click **Cancel**.



4. Click **Yes** to confirm the cancellation. On the **Orders** page, **Canceled** appears in the **Retrieved** column for the canceled order.

### See also

[Create an order](#) on [page 16](#)

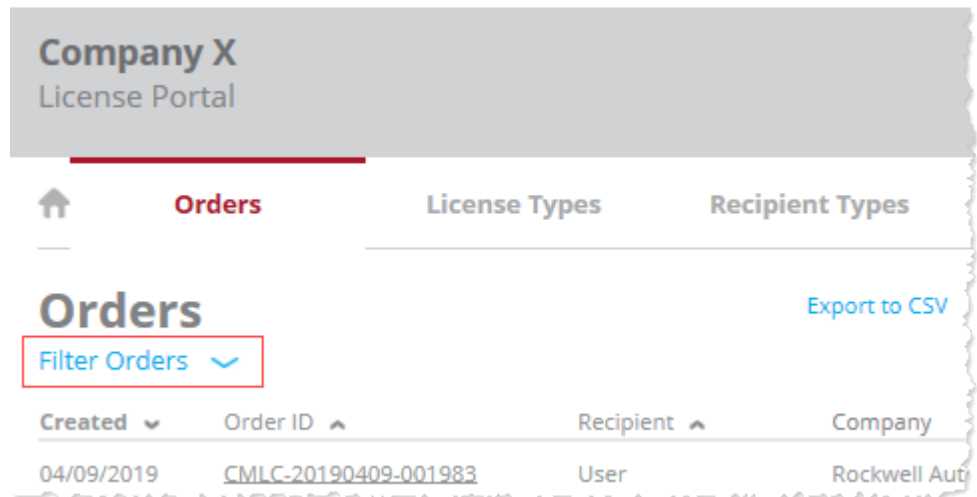


## Filter the orders list

Filter the orders list to find orders based on criteria such as recipient, company, or date of retrieval.

### To filter the orders list:

1. On the **Orders** page, select **Filter Orders**.



2. Select the filter criteria to apply to the list:
  - To filter by keyword, in the **Keyword** menu, choose the field to search for the keyword, either **Order ID**, **Recipient**, **Company**, **Container ID**, **License Type**, or **Recipient Type**, and then type the keyword in the space provided.
  - To filter on order dates, enter date ranges in the **Creation Date** and **Retrieval Date** boxes.
  - To filter on order status, select or clear the check boxes for **Retrieved**, **Not Retrieved**, **No Receipt**, or **Canceled**.
3. Select **Apply Filters**.
4. To remove the filters, select **Clear All**.

### See also

[Create an order](#) on [page 16](#)

[Cancel an order](#) on [page 19](#)

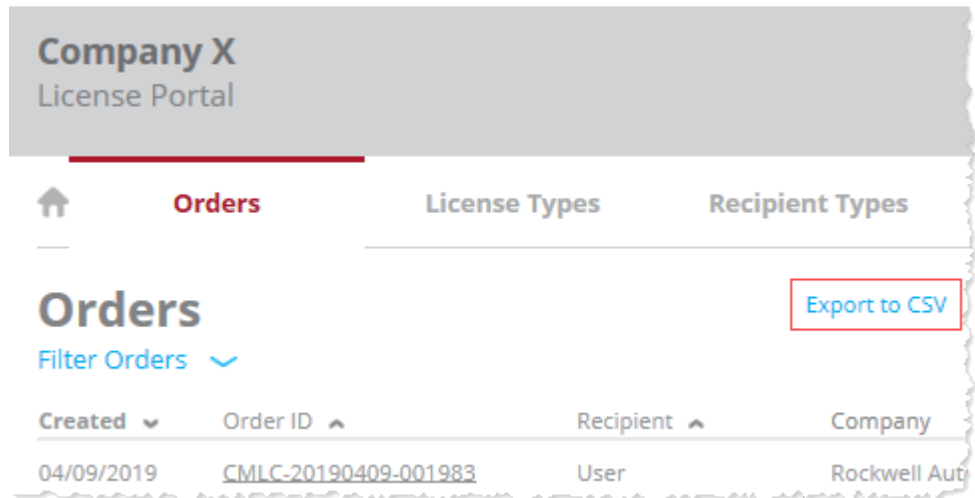
[Create a copy of an order](#) on [page 17](#)

## Download the orders list as a CSV file

Download the orders list as a CSV file for use with spreadsheet applications.

### To download the orders list as a CSV file:

1. On the **Orders** page, select **Export to CSV**.



2. Save the file and open it in a spreadsheet application.

### See also

[Create an order](#) on [page 16](#)

[Create a copy of an order](#) on [page 17](#)

[Filter the orders list](#) on [page 20](#)

## Manage license containers

Licenses are retrieved onto license containers. A license container can be either a USB (CmStick) or an SD card (CmCard). If a license container is lost or broken, disqualify it from use by revoking it. A revoked license container cannot be used to retrieve a license. A license container can also be reinstated to return it to active status.

## Revoke and reinstate license containers

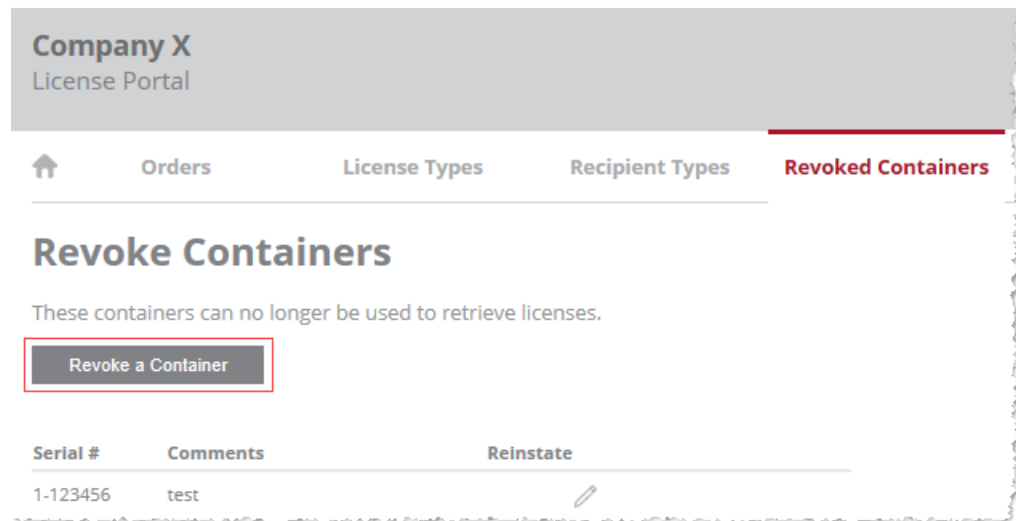
A revoked license container cannot be used to retrieve a license. The most common reason to revoke a license container is when it is lost or broken.

Revoked license containers can be reinstated to return them to use.

### To revoke a license container:

1. On the License Portal **Home** page, select **Revoked Containers**.

2. Click **Revoke a Container**.



3. In the **Revoke Container** dialog box, in the **Enter container serial number** box, type the serial number of the license container to revoke.

Select **View Details** to see additional information about the license container to make sure you selected the correct one.

4. (Optional) In the **Comments** box, type notes or additional information.
5. Select **Revoke**.

#### To reinstate a license container:

1. On the License Portal **Home** page, select **Revoked Containers**.
2. In the list of license containers, select the pencil icon in the **Reinstate** column for the license container to reinstate.
3. In the **Reinstate Container** dialog box, select **Yes**.

## Manage administrator accounts

Use the **Admin Accounts** page to create, edit, and delete administrator accounts. All users of the License Portal are administrators.

#### To manage administrator accounts:

1. On the License Portal **Home** page, select **Accounts**.



2. To create an administrator account, select **Create Admin Account** and enter the administrator's username and email address.
3. Select **Create**. A password is automatically generated for the new account and is sent to the new user's email address.
4. To edit the email address for an account, click the pencil icon in the **Edit** column. Enter the new email address.
5. To delete an account, click the trash can icon in the **Delete** column.

#### See also

[Log out of the License Portal](#) on [page 24](#)

[Manage license containers](#) on [page 21](#)

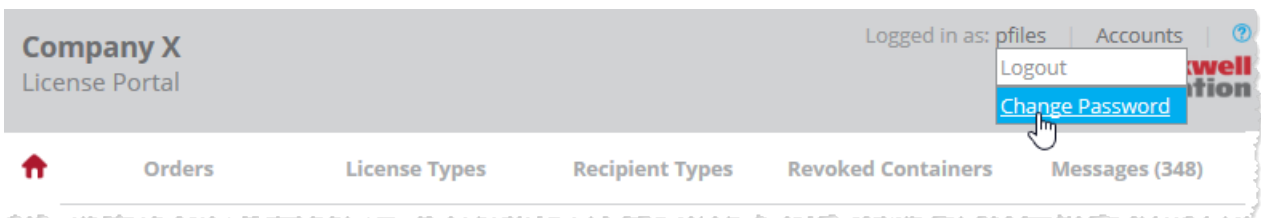
[Create licenses](#) on [page 13](#)

## Change an administrator password

Follow these steps to change an administrator password.

#### To change a password:

1. Point to the user name at the top of the page and select **Change Password**.



2. In the **Current Password** box, type the current password.
3. In the **New Password** box, type the new password. The password must contain at least eight characters.
4. In the **Confirm New Password** box, type the new password again.
5. Click **Save**.

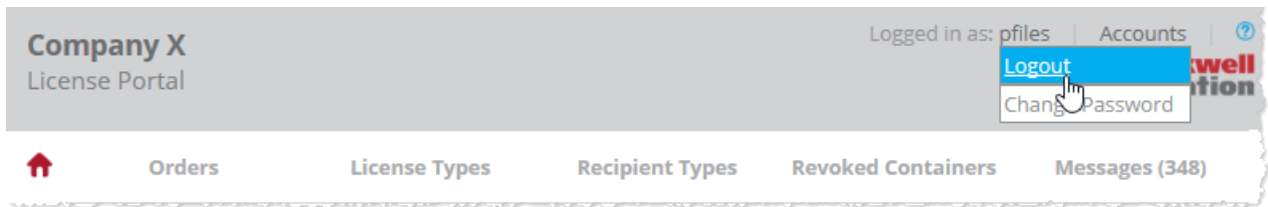
#### See also

[Manage administrator accounts](#) on [page 22](#)

[Log out of the License Portal](#) on [page 24](#)

## Log out of the License Portal

To log out of the License Portal, point to the user name at the top of the page and select **Logout**.



### See also

[Manage administrator accounts](#) on [page 22](#)

## Retrieve and view licenses

### Introduction

This chapter describes how to:

- Retrieve licenses
- Use the License Viewer Client

### Retrieve a license for a locally connected license container

Use the License Portal to retrieve a license for a license container connected to a USB port on the computer.


**To retrieve a license for a locally connected license container:**

1. Open the License Portal.
2. Enter the ticket number in the **Ticket number** box.
3. Click **Find Ticket**.



The screenshot shows the 'Demo Company License Portal' interface. At the top, there is a header with 'Demo Company' and 'License Portal'. Below the header is a search bar labeled 'Find ticket'. Underneath, there is a section titled 'Retrieve Licenses'. In this section, there is a label 'Ticket number:' followed by a text input field. Below the input field is a button labeled 'Find Ticket', which is highlighted with a red rectangular border.

4. Click **Retrieve Licenses**.
5. On the **Choose License Container** menu, select the license container where the license should be downloaded. Plug the license container can be plugged into any USB port on the computer.

Click the **Refresh** icon  to discover license containers recently plugged into the computer.

**Tip:** Some licenses are configured to remove all other licenses from the license container when they are downloaded. Contact the license administrator if the existing licenses on the license container should not be deleted.

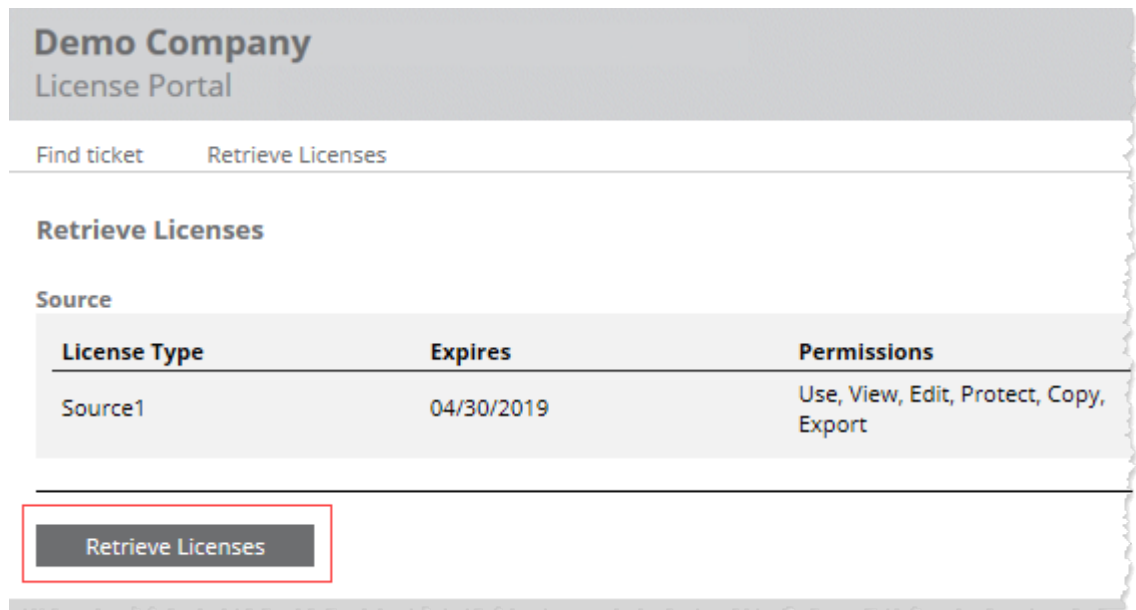
6. Click **Retrieve Licenses**.
7. When the license transfer is complete, click **OK**.

## Retrieve a license using an email link


Users who are not administrators can use the License Portal to retrieve a license by clicking the link in an email notification.

**To retrieve a license using an email link:**

1. Click the link in the email to open the License Portal.
2. Click **Retrieve Licenses**.



3. On the **Choose License Container** menu, select the license container that will contain the license. The license container can be plugged into any USB port on the computer.

Click the **Refresh** icon  to discover license containers recently plugged into the computer.

**Tip:** Some licenses are configured to remove all other licenses from the license container when they are downloaded. Contact your license administrator if the existing licenses on the license container should not be deleted.

4. Click **Retrieve Licenses**.
5. When the license transfer is complete, click **OK**.

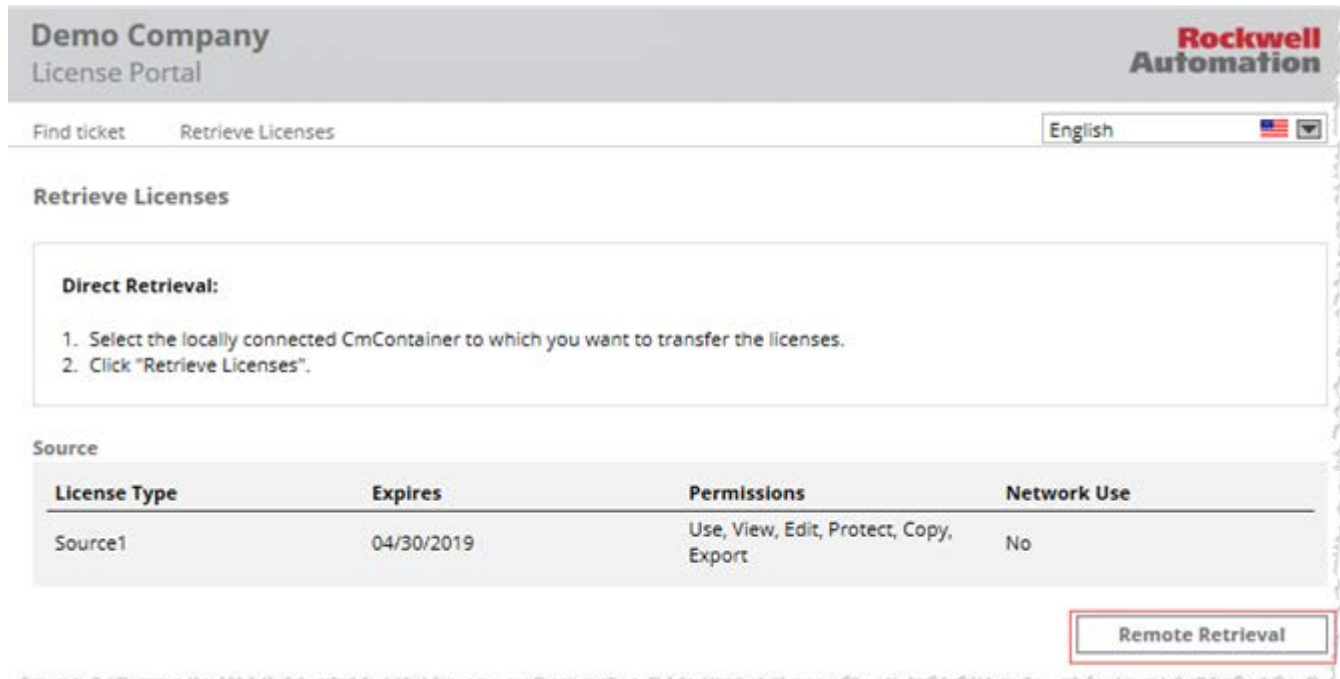
## Retrieve a license for a license container not connected locally

Use the License Portal to retrieve a license for a license container that is not connected to the computer. A license request file is required to retrieve a license for a license container that is not connected locally. After transferring the license file to the remote computer, generate a receipt that can be uploaded to the license portal to verify that the license was delivered to the remote license container.

### To retrieve a license for a license container not connected locally:

1. On the remote computer, use the **CodeMeter™** application to create a license request file.
2. Copy the license request file to the local computer.
3. Open the License Portal.
4. Enter the ticket number in the **Ticket number** box.
5. Select **Find Ticket**.
6. Select **Retrieve Licenses**.



7. Select **Remote Retrieval**.

8. Select **Browse** to find the license request file on the computer.
9. Select **Upload Request and Continue Now**.
10. Select **Download License Update File Now**.
11. When the license transfer is complete, click **OK** and save the license file on the computer. License file names use **WibuCmRAU** as the extension; for example, license.WibuCmRAU.
12. Copy the license file onto the remote computer. Double-click the file on the remote computer to add it to the license container connected to that computer.
13. On the remote computer, open the **CodeMeter Control Center™** application.
14. Select the license container plugged into the remote computer and click **License Update**.
15. In the **CMFAS Assistant™**, click **Create receipt**.
16. Save the receipt file and transfer it to the local computer. The receipt file also uses **WibuCmRAU** as the extension; for example, receipt.WibuCmRAU.

17. In the license portal on the local computer, click **Upload Receipt**.

### See also

[Retrieve a license for a locally connected license container](#) on [page 25](#)

## Create a license request file

To retrieve a license for a license container connected to a remote computer that does not have Internet access, create a license request file. Use the **CodeMeter Control Center** application on the remote computer to create a license request file, and then transfer the license request file from the remote computer to the local computer.

### To create a license request file:

1. Log on to the remote computer. The remote computer must have a license container plugged into a USB port.
2. Open the **CodeMeter Control Center** application on the remote computer. To open the application, click the CodeMeter icon in the system tray, or navigate to the C:\Program Files (x86)\CodeMeter\Runtime\bin folder and run the **CodeMeter.exe** file.
3. Select the license container plugged into the remote computer and click **License Update**.
4. In the **CMFAS Assistant**, click **Create license request**.
5. Choose either **Extend existing license** or **Add license of a new producer**:
  - If the license container already contains a license with the desired Firm Code, choose **Extend existing license**.
  - If the license container does not contain a license with the desired Firm Code, choose **Add license of a new producer**.
6. Click **Next**, and either select the desired **Vendor (Firm Code)** to extend an existing license, or type the desired **Firm Code** to add a new license vendor.
7. Type a file name for the license request file.
8. Click **Commit** to save the license request file.
9. Transfer the license request file to the local computer, which has an Internet connection.
10. Follow the steps for retrieving a license for a license container not connected locally.

# Rockwell Automation support

Use the following resources to access support information.

<b>Technical Support Center</b>	Knowledgebase Articles, How-to Videos, FAQs, Chat, User Forums, and Product Notification Updates	<a href="https://rockwellautomation.custhelp.com">https://rockwellautomation.custhelp.com</a>
<b>Local Technical Support Phone Numbers</b>	Locate the phone number for your country.	<a href="http://www.rockwellautomation.com/global/support/get-support-now.page">http://www.rockwellautomation.com/global/support/get-support-now.page</a>
<b>Direct Dial Codes</b>	Find the Direct Dial Code for your product. Use the code to route your call directly to a technical support engineer.	<a href="http://www.rockwellautomation.com/global/support/direct-dial.page">http://www.rockwellautomation.com/global/support/direct-dial.page</a>
<b>Literature Library</b>	Installation Instructions, Manuals, Brochures, and Technical Data.	<a href="http://www.rockwellautomation.com/global/literature-library/overview.page">http://www.rockwellautomation.com/global/literature-library/overview.page</a>
<b>Product Compatibility and Download Center (PCDC)</b>	Get help determining how products interact, check features and capabilities, and find associated firmware.	<a href="http://www.rockwellautomation.com/global/support/pcdc.page">http://www.rockwellautomation.com/global/support/pcdc.page</a>

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