

Unlock the Power
Within Your Data

IDEA 10

IDEA Installation Guide



CA301

IDEA

Installation Guide

IDEA 10.4

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CA301 IDEA Installation Guide

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Section 1

Introduction

Thank you for choosing IDEA. Your purchase includes the following:

- IDEA 10.4 software (by CD or downloadable file)
- [License](#) (for licensed editions)

This guide details the upgrade and installation instructions for IDEA 10.4. This guide is intended for current IDEA (IDEA Version Nine and later) users and new users. Please read this section (Section 1: Introduction) and then [follow the appropriate upgrade or installation instructions](#) related to your purchase.

Quick Links

- [System requirements](#)
- [Which edition of IDEA do I have?](#)
- [Should I upgrade or do a full install?](#)
- [Upgrade instructions](#) (IDEA Single User, IDEA Corporate, and IDEA Concurrent only)
- Full installation instructions
 - [Section 3: Installing IDEA Single User](#)
 - [Section 4: Installing IDEA Corporate and Corporate License Manager](#)
 - [Section 5: Installing IDEA Concurrent and SafeNet License Manager](#)
 - [Section 6: Installing IDEA Site License](#)
 - [Section 7: Installing IDEA Educational](#)
 - [Section 8: Installing IDEA Demonstration](#)

Additional Resources

The following resources are available:

- Manuals: The following manuals are installed with IDEA and available in PDF format.
 - IDEA Tutorial
 - Report Reader Tutorial
 - SmartAnalyzer Tutorial
 - Advanced Statistical Methods Case Study
- Online Help: Accessible from the Help button on the IDEA Ribbon. Context-sensitive help is also available in many task dialog boxes.
- Visit the [CaseWare Analytics Support Portal](#) or contact the Support team at support.cwa@caseware.com.
- Contact your local [CaseWare Analytics Partner](#)

Feedback

Your feedback is important to us. Send your documentation-related comments to IDEAdocumentation@caseware.com.

System Requirements

The following system requirements are detailed for your installation of IDEA.

Software Requirements

The following details the supported Windows operating systems and the supporting software required to run IDEA.



Important

You must have the latest Windows updates/service packs installed.

Supported Windows Operating Systems

The following Windows operating systems are supported:

Product	Windows (x86, x64)			Windows Server (x64)			
	7 SP1	8.1 Update 1	10	2008 R2 SP1	2012	2012 R2 Update 1	2016
IDEA Single User	✓	✓	✓				
IDEA Corporate	✓	✓	✓	✓	✓	✓	✓
IDEA Concurrent	✓	✓	✓	✓	✓	✓	✓
IDEA Educational	✓	✓	✓	✓	✓	✓	✓
IDEA Site License	✓	✓	✓	✓	✓	✓	✓
IDEA Demonstration	✓	✓	✓	✓	✓	✓	✓
Corporate License Manager (CLM)	✓	✓	✓	✓	✓	✓	✓
SafeNet License Manager (SLM)	✓	✓	✓	✓	✓	✓	✓
Update IDEA License Tool	✓	✓	✓	✓	✓	✓	✓



Visualization Feature Requirements

To run the Visualization feature in IDEA, your system requires the following:

- 64-bit Windows operating system
- 8 GB of RAM

Supporting Software

If the following applications are not already installed, the IDEA installation program will install them automatically:

- Microsoft .NET Framework 4.7.1
- Microsoft Office Access Database Engine 2010
- Microsoft SQL Server Compact 4.0
- Microsoft Visual C++ 2010 SP1 Redistributable Package
- Microsoft Visual C++ 2013 Redistributable Package
- Microsoft Visual C++ 2015 Redistributable Package

Hardware Requirements

The following table outlines the minimum hardware requirements:

Hardware	Minimum	Recommended
Processor	Dual core 2 GHz	Dual core 3 GHz or higher
RAM	4 GB	16 GB
Disk Space	5 GB	500 GB



DPI/Display Scaling

IDEA does not support DPI scaling (Windows 7) or display scaling (Windows 8.1 Update and Windows 10). For high resolution monitors/screens, it is recommended to adjust the screen resolution for legibility.

For Windows 10, it is also recommended to enable the **Override high DPI scaling behavior** feature and select scaling performed by **System**. To enable this feature, access the Properties dialog box for **idea.exe** and click **Change high DPI settings** on the **Compatibility** tab.

Administrator Privileges

All editions of IDEA and its associated tools must be installed with administrative privileges.

CaseWare Passport Accessibility

In order for IDEA users to access the CaseWare Passport feature, the following must be accessible through your organization's firewall or proxy:

- Port: 443
- URL: <https://prmlicensing.caseware.com/passport/passportmanagement/>

Language Support

If you are installing a non-English edition of IDEA:

- You must also install the Microsoft .NET Framework 4.7.1 Language Pack (www.microsoft.com/download).
- Non-English editions of IDEA are only supported on operating systems of the same language and regional settings (e.g., French IDEA on a French operating system).

Technical Notes

• Multi-Domain Environments

Two-way trust is required when IDEA products are installed in a multi-domain environment. Contact [CaseWare Analytics Support](#) for more information.

• CaseWare Working Papers

- IDEA is compatible with CaseWare Working Papers 2016 or later.
- IDEA only supports a single implementation of CaseWare Working Papers. Concurrent installed versions of CaseWare Working Papers are not supported.
- CaseWare Working Papers must be installed before installing or upgrading IDEA. If you installed or upgraded IDEA before installing CaseWare Working Papers, you must run the IDEA installation/upgrade file again and click **Repair** to ensure IDEA is properly configured to work with CaseWare Working Papers.

• Silent Install

If IDEA is installed silently with the parameter to centralize all IDEA projects and files for all users, the Samples project is locked to the first user to launch IDEA. Similarly, the Tutorial project is locked to the first user to access that project. If other users try to access those locked projects, they will not have access to the project's Project Overview and Library features. Refer to the *Locking and Unlocking Desktop Projects* topic in the IDEA online help for more information.

• Project Overview

Due to supporting software upgrades in IDEA 10.4, the Project Overview feature for a database is not backward compatible after you open that database in IDEA 10.4.

Supported Environments

The following table outlines which IDEA products are supported on virtual machines, Remote Desktop connections, and Citrix/terminal servers.



Windows 8.1 Update and Windows 10 Users

If you are installing IDEA Single User with the Hyper-V role enabled, the IDEA installer defines the computer as a virtual machine. To correct this issue, disable the Hyper-V role and reboot the computer. See Microsoft documentation for instructions.

Product		Virtual Machine	Remote Desktop	*Citrix/Terminal Server
IDEA Single User		x	x	x
IDEA Demonstration		✓	✓	✓
IDEA Educational		✓	✓	✓
IDEA Site License		✓	✓	✓
IDEA Concurrent	SafeNet License Manager	✓ **	✓	x
	IDEA Concurrent	✓	✓	✓
IDEA Corporate	Corporate License Manager	✓	✓	x
	IDEA Corporate	✓	✓	✓

* Supported versions of Citrix are XenApp and XenDesktop 7.6 and 7.12.

** The SafeNet License Manager (SLM) may be installed on a virtual machine. However, it is not recommended that this virtual machine be hosted in a load balancing system where it could be migrated. For more information, contact [CaseWare Analytics Support](#).

Multiple CaseWare Products

The following table outlines which CaseWare products can and cannot co-exist on the same computer:

Can	Corporate License Manager ¹ + IDEA Corporate
	Corporate License Manager ¹ + IDEA Server ²
	SafeNet License Manager + IDEA Concurrent
	IDEA ³ + IDEA Server Administration
Cannot	IDEA + IDEA Server
	Multiple editions of IDEA ⁴
	Multiple versions of the same IDEA edition ⁵

IDEA Server is a powerful data analysis application that operates using network servers. While you view the data and perform your analysis using the IDEA client installed on your computer, all your data storage and processing is done on a server. For more information, visit the [CaseWare Analytics website](#). IDEA Server is compatible with IDEA Corporate and IDEA Site License.

¹ Includes Corporate License Manager Administration.

² Includes IDEA Server Administration.

³ Only IDEA Site License and IDEA Corporate

⁴ This also includes license management tools. Corporate License Manager and SafeNet License Manager cannot co-exist on the same machine.

⁵ This includes IDEA (all editions) and license management tools. For example, IDEA 9 and IDEA 10 cannot co-exist on the same machine and neither can Corporate License Manager 10.1 and Corporate License Manager 10.2.

Using the Correct Installation Instructions

Not sure if you should upgrade or do a full installation?

- **Upgrade**

Current IDEA Single User, IDEA Corporate, and IDEA Concurrent users upgrading to the latest version of IDEA should follow the [upgrade](#) instructions.

- **Full Installation**

The following scenarios require a [full installation](#) of IDEA:

- New IDEA (any edition) users
- Current IDEA Educational, IDEA Site License, and IDEA Demonstration users upgrading to the latest version of IDEA
- Current IDEA users who are installing a different edition of IDEA

Your [license key](#) determines which edition of IDEA you will be upgrading/installing.

Understanding Your License Keys

The following editions of IDEA are available:

- IDEA Single User
- IDEA Corporate (includes IDEA Corporate and Corporate License Manager)
- IDEA Concurrent (includes IDEA Concurrent and SafeNet License Manager)
- IDEA Site License
- IDEA Educational
- IDEA Demonstration

Some editions of IDEA require a license key. Upon purchase of IDEA, you can find your license key on the label affixed to the back of your installation CD or in the installation email you received from your local [CaseWare Analytics Partner](#).

Edition	Number of license keys
IDEA Single User	You are provided with a single license key for IDEA. Your License Key text file may look similar to the following: Product: IDEA V10 Single User (Electronic) (ASCII-English) Install key: #####-#####-#####-#####-#####-#####-##### Expiration: Permanent Activated By: Not Active

Edition	Number of license keys
IDEA Corporate	You are provided with two license keys. - 1 for Corporate License Manager (CLM) and Corporate License Manager Administration (CLM Admin) - 1 for IDEA Corporate Your License Key text file may look similar to the following: Product: Corporate License Manager (CLM) (ASCII-English) Install key: #####-#####-#####-#####-#####-#####-#####-##### Expiration: Permanent Activated By: Not Active ----- Product: Corporate Users (ASCII-English) Install key: #####-#####-#####-#####-#####-#####-#####-##### Expiration: Permanent Activated By: Not Active
IDEA Concurrent	You are provided with two license keys. - 1 for SafeNet License Manager (SLM) - 1 for IDEA Concurrent Your License Key text file may look similar to the following: Product: SafeNet License Manager (SLM) (ASCII-English) Install key: #####-#####-#####-#####-#####-#####-#####-##### Expiration: Permanent Activated By: Not Active ----- Product: Concurrent Users (ASCII-English) Install key: #####-#####-#####-#####-#####-#####-#####-##### Expiration: Permanent Activated By: Not Active
IDEA Educational	A license key is not provided. The software includes a default license key.

Note that **Product** details the type of license you have purchased. It will clearly indicate which edition of IDEA you will be installing (see highlighted areas in the sample License Key text files).

Once IDEA is installed you can find your IDEA license key on the **File** tab > **Help**. The license key is displayed in the **About IDEA** section.

Upgrade and Installation Instructions for all IDEA Editions

The table below outlines the upgrade and installation sections in this guide to follow based on the product you want to install.

Type	Product	Go to
Upgrading	IDEA Single User	Section 2: Upgrading
	IDEA Corporate IDEA Concurrent	
Full Installation	IDEA Single User	Section 3: Installing IDEA Single User
	IDEA Corporate	Section 4: Installing IDEA Corporate and Corporate License Manager
	IDEA Concurrent	Section 5: Installing IDEA Concurrent and SafeNet License Manager
	IDEA Site License	Section 6: Installing IDEA Site License
	IDEA Educational	Section 7: Installing IDEA Educational
	IDEA Demonstration	Section 8: Installing IDEA Demonstration

Section 2

Upgrading



Upgrading to Windows 10

If you are considering to upgrade to Windows 10, it is recommended to upgrade your operating system first and then upgrade IDEA to ensure that all IDEA prerequisites are updated. However, if you upgraded IDEA first and then upgraded to Windows 10, run the IDEA installer again to resolve any issues.

The upgrade process is only available for the following editions of IDEA:

- IDEA Single User
- IDEA Corporate
- IDEA Concurrent

When performing an upgrade, you do not have to manually uninstall your existing IDEA software or re-activate your license. The upgrade process installs the latest version of your existing IDEA software on the machine that currently hosts the IDEA software.



If you are installing the latest version of IDEA on a new machine or are installing a different edition (e.g., IDEA Corporate vs. IDEA Single User), you must purchase a new license key and then activate the license. Refer to the appropriate [installation procedures](#).

Upgrade Process



Silent Install

The upgrade process cannot be completed through a silent install.



Upgrading IDEA Corporate and IDEA Concurrent

IDEA Corporate and IDEA Concurrent users must first upgrade their license management tool (Corporate License Manager and SafeNet License Manager) and then upgrade IDEA. All information associated with your license management tool is retained.

When upgrading your IDEA software, you must perform the upgrade in the following order:

Step 1: [Downloading the latest version of IDEA](#)

Step 2: [Upgrading the License Management Tool](#) (IDEA Corporate and IDEA Concurrent only)

Step 3: [Upgrading IDEA](#)

Step 1: Downloading the Latest Version of IDEA

For the first step in the upgrade process, you must download the latest version of IDEA.

Refer to the table below to use the recommended method for your version of IDEA.

For current...	Use this method...
IDEA 9 users	The Check for Updates feature The CaseWare Analytics Support Portal
IDEA 10 users	CaseWare Passport



If you cannot download the latest version of IDEA using these methods, contact your local [CaseWare Analytics Partner](#) or [CaseWare Analytics Support](#).

Using Check for Updates

IDEA 9 users can download the latest version of IDEA using the Check for Updates feature.



IDEA 10 Users

The Check for Updates feature is not currently recommended for IDEA 10 users. IDEA 10 users should use [CaseWare Passport](#) to download the latest version of IDEA.



IDEA Corporate Users on IDEA Server

IDEA Corporate users in an IDEA Server environment should not use Check for Updates to get the latest version of IDEA Server. Please contact your IT Department or your IDEA Server Administrator.

To download the latest version of IDEA:

1. To open IDEA (from the Start menu, Apps page, etc.), right-click the **IDEA** icon and click **Run as administrator**.
2. On the **File** tab, click **Help**.
3. From the **Tools for Working with IDEA** section, click **Check for Updates**.

The IDEA Updates Available for Download dialog box appears.

4. Click **Download**.

The CaseWare Passport log in page appears in your default web browser.

5. Click **Log In**.
6. Enter the **Email** and **Password** information associated with your CaseWare Passport account.
7. Click **Log In**.

The CaseWare Passport page appears.

8. Click **Download**.
9. From the **Select Region** drop-down list, select the region that applies to you.
10. Click **Download** to download the upgrade installation file.

11. Save the upgrade installation file to a location on every machine hosting the license management tool (if applicable) or IDEA.

The upgrade installation file should be similar to IDEA_10_0_1AD1EN32.exe. The file name will vary depending on the version you are upgrading to, the language, and whether you are upgrading a 32 or 64 bit software.

12. Do one of the following:

For this edition of IDEA...	Go to...
IDEA Corporate IDEA Concurrent	Step 2: Upgrading the License Management Tool Note: This step is usually performed by the IDEA Administrator or your IT Department. This step must be completed before upgrading IDEA.
IDEA Single User	Step 3: Upgrading IDEA

Using the CaseWare Analytics Support Portal

IDEA 9.2 and 9.2.1 users can download the latest version of IDEA directly from the [CaseWare Analytics Support Portal](#). You must be a registered CaseWare Passport user to use this method.

To download the latest version of IDEA:

1. In a web browser, go to <https://support.casewareanalytics.com/>.

The sign in page for the CaseWare Analytics Support Portal appears in your web browser.

2. Enter the **Email** and **Password** information associated with your support account.
3. Click **Log In**.
4. From the **Downloads** menu, click **Latest version of IDEA**.

The Download latest IDEA page appears.

5. Click the **Download IDEA** button.

You are directed to CaseWare Passport.

6. If required, log in to your account.
7. Click **Download**.
8. From the **Select Region** drop-down list, select the region that applies to you.
9. Click **Download** to download the upgrade installation file.
10. Save the upgrade installation file to a location on every machine hosting the license management tool (if applicable) or IDEA.

The upgrade installation file should be similar to IDEA_10_0_1AD1EN32.exe. The file name will vary depending on the version you are upgrading to, the language, and whether you are upgrading a 32 or 64 bit software.

11. Do one of the following:

For this edition of IDEA...	Go to...
IDEA Corporate IDEA Concurrent	Step 2: Upgrading the License Management Tool Note: This step is usually performed by the IDEA Administrator or your IT Department. This step must be completed before upgrading IDEA.
IDEA Single User	Step 3: Upgrading IDEA

Using CaseWare Passport

IDEA 10 users can download the latest version of IDEA using CaseWare Passport.



IDEA 10 Users

The Check for Updates feature is not currently recommended for IDEA 10 users. IDEA 10 users should use [CaseWare Passport](#) to download the latest version of IDEA.

To download the latest version of IDEA:

1. In IDEA, click the **File** tab and then click **Passport**.
The Passport page appears.
2. If prompted, log in using your Passport account credentials.
3. Click **Download**.
4. From the **Select a Region** drop-down list, select the region that applies to you.
5. Click **Download** to download the upgrade installation file.
6. Save the upgrade installation file to a location on every machine hosting the license management tool (if applicable) or IDEA.

The upgrade installation file should be similar to IDEA_10_0_1AD1EN32.exe. The file name will vary depending on the version you are upgrading to, the language, and whether you are upgrading a 32 or 64 bit software.

7. Do one of the following:

For this edition of IDEA...	Go to...
IDEA Corporate IDEA Concurrent	Step 2: Upgrading the License Management Tool Note: This step is usually performed by the IDEA Administrator or your IT Department. This step must be completed before upgrading IDEA.
IDEA Single User	Step 3: Upgrading IDEA

Step 2: Upgrading the License Management Tool



This step only applies to IDEA Corporate and IDEA Concurrent users.

You must first upgrade your license management tool (Corporate License Manager or SafeNet License Manager) before upgrading IDEA. The license management tool is usually upgraded by the IDEA Administrator or your IT Department.

The upgrade installation file that you downloaded in Step 1: [Downloading the Latest Version of IDEA](#) will be used to upgrade your license management tool.

For this edition...	Do this...
IDEA Corporate	Upgrading Corporate License Manager (CLM)
IDEA Concurrent	Upgrading SafeNet License Manager (SLM)

Upgrading Corporate License Manager (CLM)

You must upgrade Corporate License Manager (CLM) and Corporate License Manager Administration (CLM Admin) before IDEA Corporate users can upgrade their licensed IDEA software.

Usually, CLM and CLM Admin are installed on the same machine. However, if you installed CLM Admin on a different machine other than CLM, you must also perform these instructions on the machine hosting CLM Admin.



Checked Out IDEA Corporate Licenses

It is recommended that all checked out IDEA Corporate licenses are checked in before upgrading Corporate License Manager.

To upgrade Corporate License Manager:

1. Extract and Run the Upgrade Installation File

- On the machine hosting CLM, navigate to and double-click the upgrade installation file that you downloaded in Step 1: [Downloading the Latest Version of IDEA](#).
- Extract the files to a folder on your Desktop. For example, Desktop\UpgradeIDEA
- Open the folder and double-click **setup.exe**.

2. License Information

In the **License key** field, enter your Corporate License Manager (CLM) license key and then click **OK**.

You can [find your license key](#) on the label affixed to the back of your installation CD or in the installation email you received from your local [CaseWare Analytics Partner](#).

3. Prerequisite Software

Setup installs the missing prerequisite software.

Your machine may require multiple reboots as it installs the prerequisite software. After each reboot, you must re-enter your license key information to continue with the installation.

4. Installation Wizard

To start the installation process, click **Next**.

5. License Agreement Screen

Read and accept the license terms and then click **Next**.

6. Corporate License Manager Service Account Screen

- a. Enter the account name and password of the domain service account under which CLM will run.



Domain Service Account

To retain licensed user information in CLM, the service account credentials must be the same as the original that was specified during the initial CLM installation.

- b. Optionally, select the **Skip Service Account validation** check box.

This option is useful if you are installing CLM on a secure network segment where the domain controller has not been listed within the DNS for security reasons.

- c. Click **Next**.

7. Ready to Install the Program Screen

Click **Install**.

8. Files in Use Screen

If there are applications that are using files that need to be updated, you are prompted to either let the upgrade process automatically close and attempt to restart the applications or not close the applications. If you choose not to close the applications, you will need to reboot your machine after the upgrade process is complete.

Select the appropriate action and click **OK**.

9. Installation Wizard Completed Screen

To complete the installation, click **Finish**.

10. Verify License Assignments

Launch Corporate License Manager Administration (CLM Admin) and verify that all IDEA Corporate licenses are still assigned to required users. If the licenses are not assigned, you must assign them at this point. Refer to the CLM Admin online help for more information.

11. Go to [Upgrading IDEA](#).

Upgrading SafeNet License Manager (SLM)

You must upgrade SafeNet License Manager (SLM) before IDEA Concurrent users can upgrade their licensed IDEA software.

To upgrade SafeNet License Manager:

1. Extract and Run the Upgrade Installation File

- a. On the machine hosting SLM, navigate to and double-click the upgrade installation file that you downloaded in Step 1: [Downloading the Latest Version of IDEA](#).
- b. Extract the files to a folder on your Desktop. For example, Desktop\UpgradeIDEA
- c. Open the folder and double-click **setup.exe**.

2. License Information

In the **License key** field, enter your SafeNet License Manager (SLM) license key and then click **OK**.

You can [find your license key](#) on the label affixed to the back of your installation CD or in the installation email you received from your local [CaseWare Analytics Partner](#).

3. Prerequisite Software

Setup installs the missing prerequisite software.

Your machine may require multiple reboots as it installs the prerequisite software. After each reboot, you must re-enter your license key information to continue with the installation.

4. Installation Wizard

To start the installation process, click **Next**.

5. License Agreement Screen

Read and accept the license terms and then click **Next**.

6. Ready to Install the Program Screen

Click **Install**.

7. Installation Wizard Completed Screen

To complete the installation, click **Finish**.

8. Go to [Upgrading IDEA](#).

Step 3: Upgrading IDEA

The upgrade installation file that you downloaded in Step 1 of the upgrade process will be used to upgrade IDEA on the same machine that hosts your current installation of IDEA.

To upgrade IDEA:

1. Extract and Run the Upgrade Installation File

- a. On the machine hosting IDEA, navigate to and double-click the upgrade installation file that you downloaded in Step 1: [Downloading the Latest Version of IDEA](#).
- b. Extract the files to a folder on your Desktop. For example, Desktop\UpgradeIDEA
- c. Open the folder and double-click **setup.exe**.

2. License Information

In the **License key** field, enter your current IDEA license key and then click **OK**.

You can [find your license key](#) on the label affixed to the back of your installation CD or in the installation email you received from your local [CaseWare Analytics Partner](#).

3. Prerequisite Software

If you are prompted to install prerequisite software, click **Install**.

4. Installation Wizard

To start the installation process, click **Next**.

5. License Agreement Screen

Read and accept the license terms and then click **Next**.

6. Ready to Install the Program Screen

Click **Install**.

7. Installation Wizard Completed Screen

To complete the installation, click **Finish**.

8. Restart Prompt

Your machine may require a reboot if Microsoft C++ redistributable packages (prerequisite software) were installed. If you are prompted to restart your machine, you must click **Yes** to ensure IDEA is properly configured.

Section 3

Installing IDEA Single User



Upgrading to the Latest Version of IDEA

If you are upgrading your current IDEA Single User, IDEA Corporate, IDEA Concurrent, or license management tool, see [Section 2: Upgrading](#). You do not need to perform a complete installation as detailed in this section.

IDEA Single User includes one license that can only be installed on one computer. To use IDEA on additional computers, you must purchase additional IDEA Single User licenses or another edition of IDEA that would meet your requirements.

The IDEA Single User license can be a temporary license (expires after a specific time period) or a permanent license.

With IDEA Single User, you must activate your license. You can choose to activate your license during the installation or at another time. There are two ways to activate your license:

Activation method	Description
Activate online	This direct method lets you activate your license over the web. You must have an active internet connection with port 443 open. If your network uses a proxy server, you may need to create a proxy server exception in Windows. See Microsoft documentation for instructions.
Activate offline	This indirect method requires you to send a Customer to Distributor (C2D) file to your local CaseWare Analytics Partner , who will then send you back a Distributor to Customer (D2C) file that will activate your license.



With this edition of IDEA, you also have access to [IDEA Demonstration](#).



Updating and Reclaiming Licenses

After you have activated your license, you may want to [update your license](#) on the current machine or [reclaim your license](#) on the current machine and move it to another machine.

Pre-Installation Requirements

Use Windows Control Panel to uninstall any previous version of IDEA.

To install IDEA Single User:

1. Run the Installation File

From the IDEA installation package, navigate to and double-click **setup.exe**.

2. License Information

In the **License key** field, enter your IDEA Single User license key and then click **OK**.

You can [find your license key](#) on the label affixed to the back of your installation CD or in the installation email you received from your local [CaseWare Analytics Partner](#).

3. Prerequisite Software

If you are prompted to install prerequisite software, click **Install**.

4. Installation Wizard

To start the installation process, click **Next**.

5. License Agreement Screen

Read and accept the license terms and then click **Next**.

6. Destination Folder Screen

Accept or change the destination folder and then click **Next**.

7. Ready to Install the Program Screen

Click **Install**.

8. Activate Your License

- a. Select the preferred method of activation and click **Next**.



If you prefer to activate your license at another time, click **Cancel**.

- b. Enter your activation information.

Activation method	Do the following...
Activate online	1. In the User Details section, enter your first name, last name, and email address. 2. Click Activate.
Activate offline	1. In the User Details section, enter your first name, last name, and email address. 2. In the Step #1 section, click Create... to create a Customer to Distributor (C2D) file. 3. Email the C2D file to your local CaseWare Analytics Partner. In your email, include a description of your intent, such as license activation. Your CaseWare Analytics Partner will email you back a Distributor to Customer (D2C) file. 4. Save the D2C file to your machine. 5. In the Step #2 section, click the Browse button. Navigate to and select the D2C file. 6. Click Activate.

A message appears indicating that your license has been activated.

- c. Click **OK**.

9. Installation Wizard Completed Screen

To complete the installation, click **Finish**.

10. Restart Prompt

Your machine may require a reboot if Microsoft C++ redistributable packages (prerequisite software) were installed. If you are prompted to restart your machine, you must click **Yes** to ensure IDEA is properly configured.



Activating the IDEA License After Installation

If you did not activate the IDEA license during the installation, you can activate it at a later time. However, it must be activated before you use IDEA. See [Appendix III: Activating Your License After Installation](#).

Section 4

Installing IDEA Corporate and Corporate License Manager



Upgrading to the Latest Version of IDEA

If you are upgrading your current IDEA Single User, IDEA Corporate, IDEA Concurrent, or license management tool, see [Section 2: Upgrading](#). You do not need to perform a complete installation as detailed in this section.

IDEA Corporate requires a license management tool to serve multiple users on a network server. The license management tool, Corporate License Manager (CLM), allows a specified number of named user IDEA Corporate licenses to be used within an organization. IDEA Corporate can be installed on as many computers on the network as desired. However, only a selected number of specified users in CLM, whose Windows accounts are contained in the appropriate Microsoft Active Directory group, are licensed to use IDEA.

When installing CLM, you must also install the user-interface administration tool, Corporate License Manager Administration (CLM Admin). CLM Admin can be installed on the machine that hosts CLM or can be installed on another machine on the network.

CLM Admin manages the IDEA Corporate licenses and servers. You can grant or revoke IDEA Corporate licenses by adding or removing user accounts on Corporate License Manager.

When an IDEA Corporate license is revoked for a selected user account, it cannot be granted access again for 60 days. A countdown appears next to the removed user accounts. The list of removed user accounts is maintained up to the revoked time period even if these user accounts are later removed from the Active Directory group.



- Any changes to user information in Active Directory, such as changes in a name, is reflected in CLM Admin.
- When user accounts are removed from the current Active Directory group, CLM Admin automatically detects the changes at startup. If the removed user accounts were licensed users, you are prompted to remove them from the Licensed Users list. Clicking Yes moves the selected user accounts to the Removed Users list and invokes the 60 days non-access period.

After installing Corporate License Manager, refer to the CLM Admin help system for more information on using the administration tool.

IDEA Corporate users can use IDEA when connected to the network and when working remotely. You can check out your IDEA license from the license server for offsite use.



With this edition of IDEA, you also have access to [IDEA Demonstration](#).

Installation Deployments

- CLM, CLM Admin, and IDEA Corporate may co-exist on the same computer.
- CLM and CLM Admin may be installed on different machines on the network.
- IDEA Corporate, CLM, and CLM Admin may be installed on a virtual machine.
- Corporate License Manager cannot be installed on a Citrix or terminal server.

Pre-Installation Requirements

- If you have IDEA installed, uninstall your current IDEA software:
 - IDEA Corporate
 - Corporate License Manager (including Corporate License Manager Administration)
- Create a new Microsoft Active Directory group that only contains the named users that could potentially be licensed IDEA users. Only these named users will have access to IDEA . For assistance, contact your network administrator.



Multiple Domains

Users in the Microsoft Active Directory group may come from multiple domains. For assistance on adding users from multiple domains to one Microsoft Active Directory group, refer to Microsoft documentation.

Two-way trust is required when IDEA products are installed in a multi-domain environment. Contact [CaseWare Analytics Support](#) for more information.

- Create a domain service account that will be used to run CLM .

This account must have domain user privileges. You will be prompted to enter the login credentials for this account during the installation process for CLM. For assistance, contact your network administrator.
- Ensure that the port you will use for CLM is open. CLM communicates through port 8751, by default.

Installation Process

Step 1: [Installing Corporate License Manager \(CLM\)](#)

Step 2: [Installing IDEA Corporate](#)

Step 1: Installing Corporate License Manager (CLM)

IDEA Corporate requires Corporate License Manager (CLM) to manage IDEA licenses. CLM must be installed on only one machine in the network and is usually installed by your IDEA Administrator or IT Department.

Your CLM license lets you install CLM as well as Corporate License Manager Administration (CLM Admin). You can install these two components on the same machine or on different machines within the network.

You must activate your CLM license in order to use CLM and IDEA. You can choose to activate your license during the installation or at another time. There are two ways to activate your license:

Activation method	Description
Activate online	This direct method lets you activate your license over the web. You must have an active internet connection with port 443 open. If your network uses a proxy server, you may need to create a proxy server exception in Windows. See Microsoft documentation for instructions.
Activate offline	This indirect method requires you to send a Customer to Distributor (C2D) file to your local CaseWare Analytics Partner , who will then send you back a Distributor to Customer (D2C) file that will activate your license.



Updating and Reclaiming Licenses

After you have activated your license, you may want to [update your license](#) on the current machine or [reclaim your license](#) on the current machine and move it to another machine.

To install Corporate License Manager:

1. Run the Installation File

From the IDEA installation package, navigate to and double-click **setup.exe**.

2. License Information

In the **License key** field, enter your Corporate License Manager (CLM) license key and then click **OK**.

You can find your license key on the label affixed to the back of your installation CD or in the installation email you received from your local [CaseWare Analytics Partner](#).

3. Prerequisite Software

Setup installs the missing prerequisite software.

Your machine may require multiple reboots as it installs the prerequisite software. After each reboot, you must re-enter your license key information to continue with the installation.

4. Installation Wizard

To start the installation process, click **Next**.

5. License Agreement Screen

Read and accept the license terms and then click **Next**.

6. Custom Setup Screen

You can specify which components to install on the machine. By default, both the CLM and CLM Admin are set to be installed on the same machine.

- a. Accept the default to install both components or set parameters to only install one component.

If you prefer to install CLM Admin on a different machine, click the drop-down arrow adjacent to **CLM Admin** and click **This feature will not be available**. An X will appear adjacent to the CLM Admin component.



Installing CLM Admin on a Different Machine

Follow the same instructions outlined for installing CLM including:

- Use the CLM license key.
- In the Custom Setup Screen, ensure that CLM is set as not available and only CLM Admin is set as being installed.
- You will need to enter the IP address (or computer name) and port of the machine hosting CLM.

- b. Accept or change the destination folder. Click **Change...** to change the default destination folder.
- c. Optionally, click **Space** to verify that enough disk space is available.
- d. Click **Next**.

7. Corporate License Manager Service Account Screen

- a. Enter the account name and password of the domain service account under which CLM will run.
- b. Optionally, select the **Skip Service Account validation** check box.
This option is useful if you are installing CLM on a secure network segment where the domain controller has not been listed within the DNS for security reasons.
- c. Click **Next**.

8. Active Directory User Group Screen

Enter the name of the Microsoft Active Directory group that will be used by CLM. Click **Next**.

9. Corporate License Manager Configuration Screen

Accept the default port number (**8751**) or specify another port number that will be used by CLM and then click **Next**.



If you change the default port number for the CLM, the same port number you specified here must be specified during the IDEA installation when you are prompted to enter the port number for the CLM.

10. Ready to Install the Program Screen

Click **Install**.

11. Activate Your License

- a. Select the preferred method of activation and click **Next**.



If you prefer to activate your license at another time, click **Cancel**.

- b. Enter your activation information.

Activation method	Do the following...
Activate online	1. In the User Details section, enter your first name, last name, and email address. 2. Click Activate.
Activate offline	1. In the User Details section, enter your first name, last name, and email address. 2. In the Step #1 section, click Create... to create a Customer to Distributor (C2D) file. 3. Email the C2D file to your local CaseWare Analytics Partner. In your email, include a description of your intent, such as license activation. Your CaseWare Analytics Partner will email you back a Distributor to Customer (D2C) file. 4. Save the D2C file to your machine. 5. In the Step #2 section, click the Browse button. Navigate to and select the D2C file. 6. Click Activate.

A message appears indicating that your license has been activated.

- c. Click **OK**.

12. Installation Wizard Completed Screen

To complete the installation, click **Finish**.



Activating the CLM License After Installation

If you did not activate the CLM license during the installation, you can activate it at a later time. However, it must be activated before licensed users can use IDEA. See [Appendix III: Activating Your License After Installation](#).



Specifying Licensed Users

Before users can access IDEA Corporate, you must specify which users are licensed to use IDEA. You must use Corporate License Manager Administration to specify users. For details on using Corporate License Manager Administration, refer to the online Help accessible from the Corporate License Manager Administration window.

13. Go to [Installing IDEA Corporate](#).

Step 2: Installing IDEA Corporate

Once CLM is installed, IDEA Corporate can be installed on as many computers as required although it may only be used by selected licensed users specified in CLM Admin.

To install IDEA Corporate:

1. Run the Installation File

From the IDEA installation package, navigate to and double-click **setup.exe**.

2. License Information

In the **License key** field, enter your IDEA Corporate Users license key and click **OK**.

You can [find your license key](#) on the label affixed to the back of your installation CD or in the installation email you received from your local [CaseWare Analytics Partner](#).



Manual Upgrade

Enter your current IDEA Corporate Users license key.

3. Prerequisite Software

If you are prompted to install prerequisite software, click **Install**.

4. Installation Wizard

To start the installation process, click **Next**.

5. License Agreement Screen

Read and accept the license terms and then click **Next**.

6. Corporate License Manager Configuration Screen

Enter the IP address (or computer name) and port of the computer hosting Corporate License Manager and then click **Next**.



The default port for Corporate License Manager is 8751. If you changed the port while installing Corporate License Manager, be sure to enter the same port number in this step.

7. Destination Folder Screen

Accept or change the destination folder and then click **Next**.

8. Ready to Install the Program Screen

Click **Install**.

9. Installation Wizard Completed Screen

To complete the installation, click **Finish**.

10. Restart Prompt

Your machine may require a reboot if Microsoft C++ redistributable packages (prerequisite software) were installed. If you are prompted to restart your machine, you must click **Yes** to ensure IDEA is properly configured.

Section 5

Installing IDEA Concurrent and SafeNet License Manager



Upgrading to the Latest Version of IDEA

If you are upgrading your current IDEA Single User, IDEA Corporate, IDEA Concurrent, or license management tool, see [Section 2: Upgrading](#). You do not need to perform a complete installation as detailed in this section.

IDEA Concurrent works in conjunction with a license management tool to serve multiple users on a network. The license management tool, SafeNet License Manager (SLM), allows a specified number of floating IDEA Concurrent licenses to be used within an organization. IDEA Concurrent can be installed on as many computers on the network as desired, but simultaneous usage is limited to the number of purchased licenses.

IDEA Concurrent users can only use IDEA when connected to the network.



Segmented Networks

If you have installed SLM and IDEA Concurrent on a segmented network, you must complete the steps in [Appendix V: Using IDEA on a Segmented Network](#).



With this edition of IDEA, you also have access to [IDEA Demonstration](#).

Installation Deployments

- SLM and IDEA Concurrent may co-exist on the same computer. They must both be the same encoding (e.g., ASCII) and version (e.g., v10.4).
- SLM and IDEA Concurrent may be installed on a virtual machine.

Pre-Installation Requirements

- On the machine that will host SLM, to allow TCP/IP communication between SLM and the computers where IDEA Concurrent is installed, port 1947 must be open.
- It is recommended that the server host for SLM have a static IP address.
- If you have IDEA Concurrent installed, uninstall your current IDEA software: SLM and IDEA.

Installation Process

Step 1: [Installing SafeNet License Manager](#)

Step 2: [Installing IDEA Concurrent](#)

Step 1: Installing SafeNet License Manager (SLM)

IDEA Concurrent uses SafeNet License Manager (SLM) to manage IDEA licenses. SLM must be installed on only one machine in the network and is usually installed by your IDEA Administrator or IT Department.

You must activate your SLM license in order to install and use IDEA Concurrent. You can choose to activate your license during the installation or at another time. There are two ways to activate your license:

Activation method	Description
Activate online	This direct method lets you activate your license over the web. You must have an active internet connection with port 443 open. If your network uses a proxy server, you may need to create a proxy server exception in Windows. See Microsoft documentation for instructions.
Activate offline	This indirect method requires you to send a Customer to Distributor (C2D) file to your local CaseWare Analytics Partner , who will then send you back a Distributor to Customer (D2C) file that will activate your license.



Updating and Reclaiming Licenses

After you have activated your license, you may want to [update your license](#) on the current machine or [reclaim your license](#) on the current machine and move it to another machine.

To install SafeNet License Manager:

1. Run the Installation File

From the IDEA installation package, navigate to and double-click **setup.exe**.

2. License Information

In the **License key** field, enter your SafeNet License Manager (SLM) license key and then click **OK**.

You can [find your license key](#) on the label affixed to the back of your installation CD or in the installation email you received from your local [CaseWare Analytics Partner](#).

3. Prerequisite Software

Setup installs the missing prerequisite software.

Your machine may require multiple reboots as it installs the prerequisite software. After each reboot, you must re-enter your license key information to continue with the installation.

4. Installation Wizard

To start the installation process, click **Next**.

5. License Agreement Screen

Read and accept the license terms and then click **Next**.

6. Ready to Install the Program Screen

Click **Install**.

7. Activate Your License

- a. Select the preferred method of activation and click **Next**.



If you prefer to activate your license at another time, click **Cancel**.

- b. Enter your activation information.

Activation method	Do the following...
Activate online	1. In the User Details section, enter your first name, last name, and email address. 2. Click Activate.
Activate offline	1. In the User Details section, enter your first name, last name, and email address. 2. In the Step #1 section, click Create... to create a Customer to Distributor (C2D) file. 3. Email the C2D file to your local CaseWare Analytics Partner. In your email, include a description of your intent, such as license activation. Your CaseWare Analytics Partner will email you back a Distributor to Customer (D2C) file. 4. Save the D2C file to your machine. 5. In the Step #2 section, click the Browse button. Navigate to and select the D2C file. 6. Click Activate.

A message appears indicating that your license has been activated.

- c. Click **OK**.

8. Installation Wizard Completed Screen

To complete the installation, click **Finish**.



Activating the SLM License After Installation

If you did not activate the SLM license during the installation, you can activate it at a later time. However, it must be activated before you install IDEA Concurrent. See [Appendix III: Activating Your License After Installation](#).

9. Go to [Installing IDEA Concurrent](#).

Step 2: Installing IDEA Concurrent

Once SLM is installed, install IDEA Concurrent on all required machines within the network.

To install IDEA Concurrent:

1. Run the Installation File

From the IDEA installation package, navigate to and double-click **setup.exe**.

2. License Information

In the **License key** field, enter your IDEA Concurrent Users license key and then click **OK**.

You can [find your license key](#) on the label affixed to the back of your installation CD or in the installation email you received from your local [CaseWare Analytics Partner](#).

3. Prerequisite Software

If you are prompted to install prerequisite software, click **Install**.

4. Installation Wizard

To start the installation process, click **Next**.

5. License Agreement Screen

Read and accept the license terms and then click **Next**.

6. IP Address of SLM Screen

Enter the IP address of the computer hosting SafeNet License Manager and then click **Next**.

7. Destination Folder Screen

Accept or change the destination folder and then click **Next**.

8. Ready to Install the Program Screen

Click **Install**.

9. Installation Wizard Completed Screen

To complete the installation, click **Finish**.

10. Restart Prompt

Your machine may require a reboot if Microsoft C++ redistributable packages (prerequisite software) were installed. If you are prompted to restart your machine, you must click **Yes** to ensure IDEA is properly configured.



Segmented Networks

If you have installed SLM and IDEA Concurrent on a segmented network, you must complete the steps in [Appendix V: Using IDEA on a Segmented Network](#).

Section 6

Installing IDEA Site License

IDEA Site License is customized to be branded with a client's information. For example, all reports generated from IDEA Site License are watermarked with the client's information.

Pre-Installation Requirements

Use Windows Control Panel to uninstall any previous version of IDEA.

To install IDEA Site License:

- 1. Run the Installation File**

From the IDEA installation package, navigate to and double-click **setup.exe**.

- 2. Prerequisite Software**

If you are prompted to install prerequisite software, click **Install**.

- 3. Installation Wizard**

To start the installation process, click **Next**.

- 4. License Agreement Screen**

Read and accept the license terms and then click **Next**.

- 5. Destination Folder Screen**

Accept or change the destination folder and then click **Next**.

- 6. Ready to Install the Program Screen**

Click **Install**.

- 7. Installation Wizard Completed Screen**

To complete the installation, click **Finish**.

8. Restart Prompt

Your machine may require a reboot if Microsoft C++ redistributable packages (prerequisite software) were installed. If you are prompted to restart your machine, you must click **Yes** to ensure IDEA is properly configured.

Section 7

Installing IDEA Educational

IDEA Educational is a fully functional version of IDEA with capability to analyze up to 5,000 records. It is used in educational institutions and can be installed on multiple computers.

The IDEA Educational license key that is provided does not expire.



When importing a file, IDEA Educational only imports the first 5,000 records.

Pre-Installation Requirements

Use Windows Control Panel to uninstall any previous version of IDEA.

To install IDEA Educational:

- 1. Run the Installation File**

From the IDEA installation package, navigate to and double-click **setup.exe**.

- 2. License Information**

The License key field is pre-populated with your IDEA Educational license.

Accept the default license and click **OK**.

- 3. Prerequisite Software**

If you are prompted to install prerequisite software, click **Install**.

- 4. Installation Wizard**

To start the installation process, click **Next**.

- 5. License Agreement Screen**

Read and accept the license terms and then click **Next**.

6. Destination Folder Screen

Accept or change the destination folder and then click **Next**.

7. Ready to Install the Program Screen

Click **Install**.

8. Installation Wizard Completed Screen

To complete the installation, click **Finish**.

9. Restart Prompt

Your machine may require a reboot if Microsoft C++ redistributable packages (prerequisite software) were installed. If you are prompted to restart your machine, you must click **Yes** to ensure IDEA is properly configured.

Section 8

Installing IDEA Demonstration

IDEA Demonstration is available when installing [IDEA Corporate](#), [IDEA Concurrent](#), and [IDEA Single User](#). IDEA Demonstration can be installed on any computer that meets the required system requirements. It does not require a license key and does not expire.



IDEA Demonstration is limited to 1,000 records/database. When importing a file, IDEA Demonstration only imports the first 1,000 records.

Pre-Installation Requirements

Use Windows Control Panel to uninstall any previous version of IDEA.

To install IDEA Demonstration:

- 1. Run the Installation File**

From the IDEA installation package, navigate to and double-click **setup.exe**.

- 2. License Information**

Leave the **License key** field blank and click **OK**.

- 3. Confirmation Dialog Box**

Click **Yes** to confirm that you want to install the Demonstration edition.

- 4. Prerequisite Software**

If you are prompted to install prerequisite software, click **Install**.

- 5. Installation Wizard**

To start the installation process, click **Next**.

6. License Agreement Screen

Read and accept the license terms and then click **Next**.

7. Destination Folder Screen

Accept or change the destination folder and then click **Next**.

8. Ready to Install the Program Screen

Click **Install**.

9. Installation Wizard Completed Screen

To complete the installation, click **Finish**.

10. Restart Prompt

Your machine may require a reboot if Microsoft C++ redistributable packages (prerequisite software) were installed. If you are prompted to restart your machine, you must click **Yes** to ensure IDEA is properly configured.

Appendix I

Updating Your License



This section is only applicable if you have IDEA Single User, Corporate License Manager, or SafeNet License Manager installed.

The Update IDEA License Tool can be used to update your existing IDEA electronic licenses. For example, you may want to increase the number of users on your IDEA Corporate or IDEA Concurrent license or update your IDEA Single User temporary license to extend the expiry date or convert it to a permanent license.

The update process requires you to send a Customer to Distributor (C2D) file to your [CaseWare Analytics Partner](#), who will then send you back a Distributor to Customer (D2C) file. The D2C file will update your license on the current machine.



Your license must be activated before you can update it.

To update your license:

1. Close the Corporate License Manager Administration tool. (IDEA Corporate only)
2. Do one of the following:

On the machine hosting...	Perform the following...
IDEA Single User or SafeNet License Manager (SLM)	a. From the Windows Start menu (e.g., Windows 10), click All apps and navigate to IDEA. b. Click Update IDEA License Tool.
Corporate License Manager (CLM)	a. From the Windows Start menu (e.g., Windows Server 12), navigate to CorporateLicenseManagerAdmin. b. Click Update IDEA License Tool.

3. In the **Step #1** section, click **Create...** to create a Customer to Distributor (C2D) file.



Ensure that the **Reclaim license** check box is cleared.

4. Email the C2D file to your local [CaseWare Analytics Partner](#).

In the email, include a description of your intent, such as "Update License". Your local [CaseWare Analytics Partner](#) will email you back a Distributor to Customer (D2C) file.

5. Save the D2C file to a location on the machine hosting the license you want to update.
6. In the **Step #2** section, click the **Browse** button. Navigate to and select the D2C file.
7. Click **Apply Update**.

Appendix II

Reclaiming Your License



This section is only applicable if you have IDEA Single User, Corporate License Manager, or SafeNet License Manager installed.

The Update IDEA License Tool can be used to reclaim your Corporate License Manager (CLM), SafeNet License Manager (SLM), or your IDEA Single User license on the current machine and move it to another machine. This process requires you to send a Customer to Distributor (C2D) file to your local [CaseWare Analytics Partner](#), who will then send you back a Distributor to Customer (D2C) file.

In the reclaim license process, the D2C file disables the current license on the current machine and you are provided with a new license key to install and activate the IDEA software on another machine.



Your license must be activated (usually performed during installation) before you can reclaim it.



Backing Up the CLM Database

When moving CLM to another computer, it is recommended to backup the CLM database. However, you may only copy the database once. On a second attempt, CLM will not execute. Contact your local [CaseWare Analytics Partner](#) for further details.

To reclaim your license:

1. Stop the Corporate License Manager service. (IDEA Corporate only)
2. Back up the CLM database. (IDEA Corporate only)
 - a. On the machine that hosts CLM, navigate to
C:\Users\<user>\AppData\Roaming\CaseWare IDEA.
" <user> " is the account running the Corporate License Manager service.
 - b. Create a copy of the **LicensedUsers.osl** file.

3. Do one of the following:

On the machine hosting...	Perform the following...
IDEA Single User or SafeNet License Manager (SLM)	a. From the Windows Start menu (e.g., Windows 10), click All apps and navigate to IDEA . b. Click Update IDEA License Tool .
Corporate License Manager (CLM)	a. From the Windows Start menu (e.g., Windows Server 12), navigate to CorporateLicenseManagerAdmin . b. Click Update IDEA License Tool .

4. In the **Step#1** section, select the **Reclaim license** check box.5. Click **Create...** to create and save a Customer to Distributor (C2D) file.6. Email the C2D file to your local [CaseWare Analytics Partner](#).

In the email, include a description of your intent, such as "Reclaim License". Your local [CaseWare Analytics Partner](#) will email you back a Distributor to Customer (D2C) file and new license key.

7. Save the D2C file to a location on the machine hosting the license you want to reclaim.

8. In the **Step #2** section, click the **Browse** button. Navigate to and select the D2C file.9. Click **Apply Update**.

Your IDEA software is now disabled on the current machine.

10. Optionally, use Windows Control Panel to uninstall the IDEA software on the current machine.

11. On the new machine, use the new license key to install your IDEA software. You must activate your new license during installation.

12. Copy the CLM database to the new machine. (IDEA Corporate only)

- a. On the new machine that hosts CLM, navigate to **C:\Users\<user>\AppData\Roaming\CaseWare IDEA**.

"<user>" is the account running the Corporate License Manager service.

- b. Copy the **LicensedUsers.osl** file from the old machine hosting CLM to the above location on the new machine.

13. Start the Corporate License Manager service. (IDEA Corporate only)

**Changing the Corporate License Manager Location (IDEA Corporate Only)**

After you have moved CLM to another machine, you must point IDEA Corporate and Corporate License Manager Administration (if applicable) to the new CLM location. See [Appendix IV: Updating Corporate License Manager Location](#).

Appendix III

Activating Your License After Installation

At the time of installation, perhaps due to lack of internet connection, you may have chosen not to activate your license. You can run the IDEA Electronic Activation Tool to activate your license at a more convenient time. You must activate your license in order to use IDEA.



For IDEA Concurrent users, the SafeNet License Manager license must be activated before you install IDEA.

There are two activation methods:

Activation method	Description
Activate online	This direct method lets you activate your license over the web. You must have an active internet connection with port 443 open. If your network uses a proxy server, you may need to create a proxy server exception in Windows. See Microsoft documentation for instructions.
Activate offline	This indirect method requires you to send a Customer to Distributor (C2D) file to your local CaseWare Analytics Partner , who will then send you back a Distributor to Customer (D2C) file that will activate your license.

To activate your license:

1. Do one of the following:

Edition	Do the following...
IDEA Corporate	On the machine that hosts Corporate License Manager, navigate to \CaseWare IDEA\CorporateLicenseManager .
IDEA Concurrent	On the machine that hosts SafeNet License Manager, navigate to \CaseWareIDEA\Software License .
IDEA Single User	On each machine that IDEA is installed, navigate to \CaseWare IDEA\IDEA .

2. Double-click **IdeaElectronicActivationTool.exe**.
The Electronic License Activation dialog box appears.
3. Select the preferred method of activation and click **Next**.
4. Enter your activation information.

Activation method	Do the following...
Activate online	1. In the User Details section, enter your first name, last name, and email address. 2. Click Activate.
Activate offline	1. In the User Details section, enter your first name, last name, and email address. 2. In the Step #1 section, click Create... to create a Customer to Distributor (C2D) file. 3. Email the C2D file to your local CaseWare Analytics Partner. In your email, include a description of your intent, such as license activation. Your CaseWare Analytics Partner will email you back a Distributor to Customer (D2C) file. 4. Save the D2C file to your machine. 5. In the Step #2 section, click the Browse button. Navigate to and select the D2C file. 6. Click Activate.

A message appears indicating that your license has been successfully activated.

5. Click **OK**.

Appendix IV

Updating the Corporate License Manager Location



This section is only applicable if you have IDEA Corporate installed.

If you [move Corporate License Manager \(CLM\) to another machine](#) after the initial installation, you must point IDEA and Corporate License Manager Administration (CLM Admin), if installed on a different machine other than the machine hosting CLM, to the new CLM location. This is done through the Corporate License Manager Configuration tool.

To update the Corporate License Manager location:

1. Access the Corporate License Manager Configuration dialog box:

On the machine that hosts...	Do the following...
Corporate License Manager Administration (CLM Admin) only	a. From the Windows Start menu, navigate to CorporateLicenseManagerAdmin. b. Right-click Corporate License Manager Configuration and select Run as administrator. c. Go to step 2.
IDEA only	a. From the Windows Start menu, navigate to IDEA. b. Right-click Corporate License Manager Configuration (IDEA) and select Run as administrator. c. Go to step 2.
Both IDEA and CLM Admin	You must perform the steps for both scenarios above.

2. Enter the IP address (or the computer name) and the port number of the new computer hosting CLM.
3. Click **OK**.

Appendix V

Using IDEA on a Segmented Network



This section is only applicable if you have IDEA Concurrent installed.

When installing IDEA Concurrent and its accompanying SafeNet License Manager (SLM) component on separate sub-networks, you must ensure that IDEA can communicate with SLM.

To ensure proper communication, complete the following steps:

1. On the machine that has IDEA Concurrent installed, open your web browser and in the address bar, enter **http://localhost:1947**.
The Sentinel Admin Control Center page appears.
2. From the **Options** tab, click **Sentinel Keys**.
3. Verify that your IDEA Concurrent license appears in the list. If it is not in the list perform the following steps.
4. From the **Options** area, click **Configuration**.
5. Click the **Access to Remote License Managers** tab.
6. Select the following two check boxes:
 - Broadcast Search for Remote Licenses
 - Aggressive Search for Remote Licenses
7. In the **Specify Search Parameters** box, enter the IP address or the name of the computer on which SLM is installed.
8. Click **Submit**. Allow a few minutes for the changes to take effect.
9. From the **Options** tab, click **Sentinel Keys**.
10. Verify that your IDEA Concurrent license appears in the list.

Appendix VI

Installing the CaseWare IDEA ODBC Driver

Install the CaseWare IDEA ODBC Driver (available in 32-bit and 64-bit) to create User or System DSNs that can be used to connect other applications to your IDEA databases so that you can create visualizations and reports outside of IDEA.



Installation Notes

- The bitness of the CaseWare IDEA ODBC Driver must match the bitness of the operating system. For example, you must install the 32-bit driver on a 32-bit operating system and the 64-bit driver on a 64-bit operating system.
- You must have administrative permissions on the machine on which you are installing the driver.
- You must install the driver on the same machine that you have IDEA and the destination application installed.

To install the CaseWare IDEA ODBC Driver:

1. From the IDEA installation package, navigate to the **ODBC** folder.
2. Copy the **IdeaODBCDriver.exe** self-extracting file to a location on your machine.

The CaseWare IDEA ODBC Driver is available in both 32-bit and 64-bit. View the Installation Notes above to determine which one you require.

3. Double-click the file.

The CaseWare IDEA ODBC Driver installation wizard appears.

4. If you are prompted to install prerequisite software, click **Install**.
5. In the Welcome screen, click **Next**.
6. In the License Agreement screen, select the option to accept the terms and click **Next**.
7. In the Destination Folder screen, accept or change the destination folder and then click **Next**.
8. In the Ready to Install the Program screen, click **Install**.
9. In the Completed screen, click **Finish**.

For information on how to use the CaseWare IDEA ODBC Driver, view the *Using the CaseWare IDEA ODBC Driver* topic in the IDEA online help.

Appendix VII

Performing a Silent Install



- The upgrade process cannot be completed through a silent install.
- Your user account must have local Administrator privileges on the computer on which you will run the silent install command.
- The End User License Agreement is unavailable for viewing during the silent install procedure. If you do not agree to the terms in the End User License Agreement, do not perform a silent install of IDEA.

Commands

Edition	Command
IDEA Corporate	Setup.exe /s <license key> CORPORATE_LICENSE_SERVER_NAME=<CLM server name> ACCEPTEULA=1
IDEA Single User	Setup.exe /s <license key> ACCEPTEULA=1
IDEA Concurrent	Setup.exe /s <license key> HASPLMSERVERIP=<IP of SLM> ACCEPTEULA=1
IDEA Demonstration	Setup.exe /s <license key> ACCEPTEULA=1 Note: The license key can be found in the idea.bin file, which is located in the root directory of the IDEA installation package. This file can be opened in Notepad. This license key is only required for the silent install.
IDEA Educational	Setup.exe /s <license key> ACCEPTEULA=1 Note: The license key can be found in the idea.bin file, which is located in the root directory of the IDEA installation package. This file can be opened in Notepad. This license key is only required for the silent install.
IDEA Site License	Setup.exe /S /v" /qn /norestart ACCEPTEULA=1

Optional Parameters

Description	Command
Enable IDEA Server Only Mode (IDEA Corporate and IDEA Site License Only)	ENFORCESOM="true" Note: This command is case sensitive.
Set the Corporate License Manager Server port	CORPORATE_LICENSE_SERVER_PORT=XXXX
Set a central location for storing IDEA project information for all users (Applies to all editions)	IDEA_DOCUMENTS_FOLDER="\<full path of destination folder>"



IDEA_DOCUMENTS_FOLDER Parameter

After a default silent installation, the "My IDEA Documents" folder and its sub-folders (IDEA Projects, Local Library, etc.) are created in each user's Documents system folder. You can use the optional parameter to set a central location to store all IDEA project information for all users. When you specify a custom location, the sub-folders (IDEA Projects, Local Library, etc.) are created under the specified location.

Note the following:

- If a System Administrator is performing a silent install and using the IDEA_DOCUMENTS_FOLDER parameter, the IDEA Documents folder for existing restricted users is not updated to use the specified central location. In the Windows Registry Editor, locate HKEY_CURRENT_USER > Software and delete the CaseWare IDEA folder. The central location specified by IDEA_DOCUMENTS_FOLDER is used the next time the restricted users open IDEA.
- If the specified location is invalid to users (e.g., they do not have sufficient permissions to access the location, the name is too long, etc.), when the user launches IDEA, the IDEA Documents folder defaults to C:\Program Files (x86)\CaseWare IDEA\IDEA\UserFiles\Samples on the user's machine.

Exit Codes

IDEA 10 silent installs support exit codes. Exit codes tell the Administrator the status of the installation.

To display an exit code at the end of the installation, prefix the command line with:

```
start /wait
```

Exit codes are returned in the following format:

```
echo Exit Code is %errorlevel%
```

The four most commonly returned exit codes are:

Exit Code	Explanation
-4	Invalid command line
-3	Installation canceled by user
-1	General error
0	Installation successfully completed



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