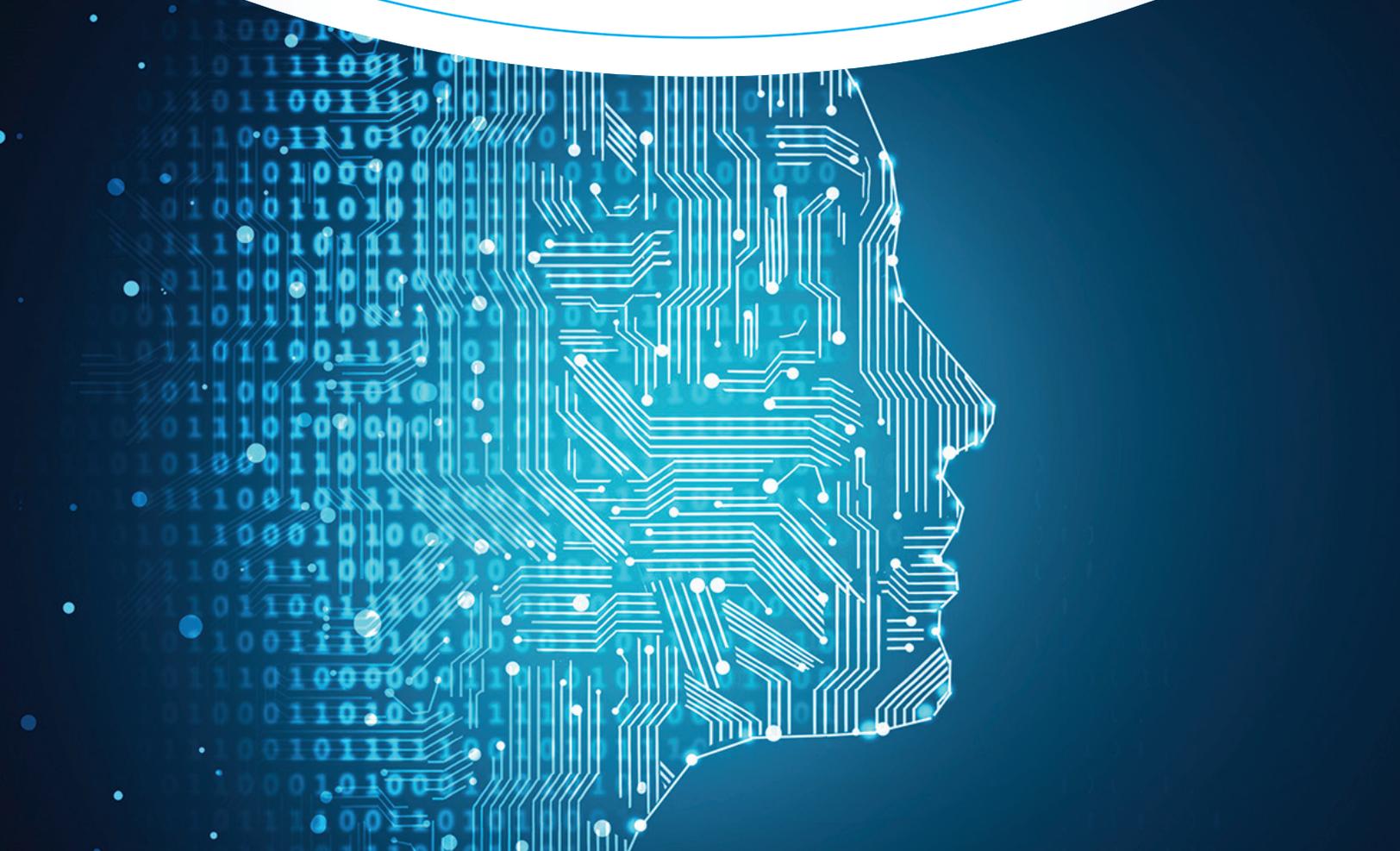




FREQUENTLY ASKED QUESTIONS

Flexible Licensing Model





The New Flexible Licensing Model

CaseWare IDEA's new flexible licensing model is designed to make the auditor's life easier. This simpler subscription-based model leverages access to IDEA's unrivaled support, resources, and upgrades to provide users with an unprecedented level of flexibility, affordability, and accessibility.

This new licensing model is for single and corporate users (on-network as well as off-network) for IDEA 11 and higher versions and makes IDEA licenses easy to manage – i.e., activate, renew and redeploy.

Frequently Asked Questions

1. What are the IDEA licensing options?

CaseWare IDEA has two licensing options: IDEA Standard and IDEA Network. An IDEA Standard license is a standalone license that is tied to the machine on which it is registered. IDEA Network licenses are typically used in large organizations where the software is managed through a centralized server.

2. In the IDEA Licensing dialog, which one should I choose: IDEA Standard or IDEA Network?

If your CaseWare IDEA Partner has provided you with an Authorization code, select IDEA Standard. If your organization has a server configuration, select IDEA Network.

3. How long can I use IDEA before registering for it?

IDEA gets installed with a Provisional License for the first 15 days without registration. You can enter a valid authorization code for a Standard IDEA license or enter the IDEA Network Server information at any time.

4. How do I register for my copy of IDEA?

After installing IDEA and running it for the first time, you will be prompted to register your software. You can choose to register now or register later. If you select Register Now, you can register an IDEA Standard license using the authorization code provided by your CaseWare IDEA Partner, or you can connect to a Network License Server to use an IDEA Network license. If you select Register Later, you can continue using IDEA until the Provisional license period expires; after which, you must register an IDEA Standard License or connect to a Network License Server to continue using IDEA.

5. I tried to register an IDEA Standard license and the registration failed.

If your online registration fails, a message appears prompting you to contact your local CaseWare IDEA Partner with the provided authorization and lock codes. However, you should first verify that you have a strong and reliable internet connection and try registering the license again. If the issue persists, then contact your CaseWare IDEA Partner with the provided authorization and lock codes.



6. I am not able to register my IDEA installation online. How do I get my offline license key and how do I use it?

Please contact your CaseWare IDEA Partner for how to obtain an offline license and how to install it. You will need to provide your authorization code as well as the lock code of your machine.

7. How do I manage my IDEA license?

Access the IDEA Licensing dialog box from the IDEA Options dialog box. You can also use CaseWare IDEA License Manager to manage your IDEA Standard license. You can access CaseWare IDEA License Manager from the IDEA folder on the Windows Start menu.

8. I am getting a message that says, “The product evaluation period has ended.”

This means that the 15-day Provisional license period has expired. If you want a standalone license, contact your CaseWare IDEA Partner and purchase an IDEA Standard subscription. You will receive an authorization code that you will use to register your license. If your company is using the IDEA Network licensing model, you must connect to the appropriate Network License Server to continue using IDEA.

9. How do I renew my IDEA license?

For IDEA Standard users, if a valid renewal is available, IDEA will attempt automatic renewal at fixed intervals (60, 30, 5, 4, 3, 2, 1 days) leading up to the expiry date. For IDEA Standard users, contact your CaseWare IDEA Partner to purchase a subscription renewal. IDEA starts checking for subscription renewals 60 days before your license expires. If a renewal is found, IDEA automatically updates your license information; otherwise, you are prompted at fixed intervals (60, 30, 5, 4, 3, 2, 1 days) leading up to your expiry date to renew your subscription. For IDEA Network users, your system administrator manages the licenses.

10. I don't have an authorization code. How do I get one?

The IDEA authorization code may be distributed by your onsite IDEA primary contact, your IT Department, or directly from your CaseWare IDEA Partner. Please contact the appropriate person.

11. How can I tell when my IDEA license expires?

You can see when your IDEA license will expire in the following locations:

- In IDEA, from the File tab, on the Help page, under the About IDEA section.
- In the IDEA Licensing dialog box. (Accessed from the IDEA Options dialog box)
- Within the CaseWare IDEA License Manager (IDEA Standard users only)

12. Will IDEA warn me about the license expiration before the actual expiry date?

IDEA Network users will not be notified. The system administrator is notified before the expiry date. IDEA Standard users are notified of the pending expiry at 60, 30, 15, and 5 days or less remaining on their license if the licenses are not renewed.



13. Do I have to reclaim and send a c2d file when I want to move my license?

No, a more simplified process is now available. The Revoke process, performed in the CaseWare IDEA License Manager, does not require exchanging anything with your IDEA Partner.

14. What if my laptop or computer is lost, stolen or breaks?

You must contact your administrator with the details of the situation so they can arrange for a new activation to be added to your existing authorization code. You can then use the authorization code to install IDEA on a new computer.

15. My IDEA 10 licenses did not expire. Why does my IDEA 11 or 12 license expire?

With the release of IDEA 11, changes were made to our licensing model which also included making our software subscription-based. Pre-IDEA 11 users wishing to upgrade to IDEA 11 or later versions will be transferred to the subscription model. IDEA 9 and 10 customers under an annual support and maintenance contract will see only a modest increase in their annual payments and will never have to pay the full subscription amount. IDEA 11 or later version subscribers will continue to receive product updates, local support, and access to Passport as part of their subscription. In addition, the subscribers will see enhanced value with access to additional advanced audit applications and utilities, access to IDEA Lab, and more audit-specific resources on CaseWare Passport.

16. What happens to my existing Support and Maintenance benefits when I upgrade to IDEA 11 or higher version?

Everything that was provided under the IDEA Support and Maintenance is now included with your annual subscription. In addition, your subscription will include:

- Upgrades to the latest version with enhanced capabilities including the powerful hybrid functionality
- Technical fixes and all-year-round local support
- The new IDEA Passport for technical support and resources such as videos, tutorials, script vault, white papers, etc.
- SmartAnalyzer Apps such as Exceptional Exceptions - General Ledger, Purchase Card, Financial App Package, and Utilities at no additional cost for most users
- Access to IDEA Lab, our library of advanced audit plugins that highlight new technology solutions such as Machine Learning, Python, and visualizations

17. How do I upgrade from IDEA 10 to IDEA 11 or higher versions?

For upgrading from IDEA 10 to IDEA 11, you need to manually uninstall IDEA 10 and then install IDEA 11.

- For IDEA 10 Single Electronic License users, you must upgrade to IDEA 11 Standard.
- For IDEA 10 Corporate Network License (CLM) or Concurrent Network License (SLM) users, you have the option to upgrade to either IDEA 11 Standard or IDEA 11 Network (which uses the new Network License Manager). Your IT Manager/IDEA prime will work with your local CaseWare IDEA Partner to select the best option for your organization.



18. Can I install IDEA in a virtual environment, such as Citrix?

Yes. In order to deploy IDEA in a virtual environment, you must use the Network License Server. Contact your CaseWare IDEA Partner for more information.

19. We purchased five IDEA subscription-based licenses, but we were sent only one authorization code. Is this right?

Yes. This single authorization code will allow five users to activate and use IDEA.

To learn more about the exciting new features included in CaseWare IDEA or for information on how to upgrade, contact us at salesidea@caseware.com.



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About CaseWare IDEA

CaseWare IDEA is an internationally recognized data analytics software company that provides cutting-edge solutions for accounting firms, corporations, and governments. A leader in the audit and accounting industries for over 25 years, IDEA® Data Analysis Software equips auditors, accountants and other finance professionals with a toolkit that allows them to perform data analysis quickly for various audit-related tasks. IDEA uses artificial intelligence and machine learning to change the way we think about and work with data. The result: measurable returns on efficiency, quality, and value.

CaseWare IDEA is a division of CaseWare International, which has led the audit and accounting software industry for over 30 years, with solutions supported in 16 languages and used by more than 500,000 people across 130 countries. To learn more, visit idea.caseware.com.