



IDEA

AUDIMATION

# FLEXIBLE LICENSING MODEL BENEFITS & FAQs

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Now available in IDEA 11



## The New Flexible New Licensing Model

IDEA 11's new flexible user licensing model is designed to make the auditor's life easier. This simpler subscription model leverages access to IDEA's unrivaled support, resources, and upgrades to provide users with an unprecedented level of flexibility, affordability, and accessibility.

### Benefits of The Flexible Licensing Model

#### **Subscription-based licensing**

Our new subscription-based licensing model is a more flexible and cost-effective way to connect your users with the most advanced audit analytics software on the market. IDEA now offers more subscription options to suit individual user needs, including term lengths of more or less than the standard one-year commitment. As a result of our new subscription-based licensing model, IDEA's pricing is greatly simplified, allowing you to plan short- and long-term budgets with confidence.

#### **Standard deployment**

One-click licensing deployment allows you to activate licenses quickly and easily with a single activation key, bypassing the need to contact local distributors.

#### **Self-managed license**

Users can now activate, renew, and manage licenses between machines through the License Manager.

#### **Direct access to new software releases and Free upgrades**

Users can access the newest IDEA features and program improvements with unrestricted access to new updates, releases, and documentation.

#### **Local technical support**

IDEA is sold and supported by an extensive global network of certified distribution partners. With the new licensing model, users can access expert IDEA support resources in their language during local business hours.

#### **Resources**

IDEA's technical support site includes the latest versions of IDEA software installation package, IDEA installation guides, manuals and other documentation, and additional optional import components. Users are also granted access to IDEA knowledge library and support tools, including scripts and tutorial videos.



### **Access to IDEA Lab**

IDEA Lab contains working prototypes for users to test, comment on, and share with the IDEA community. Working prototypes can be Python and IDEAScripts, IDEA-related resources, SmartAnalyzer Apps, and more. Items can be posted for sharing, feedback, and customer testing.

### **AuditNet® Premium Subscription**

AuditNet® serves the global audit community with an online portal for auditors to share resources, tools, and experiences, including audit work programs and other audit documentation. Users enjoy free access to this portal (USD 175 value per user) through our new licensing model.

### **Passport**

IDEA includes a support gateway called Passport, which gives users access to a wealth of helpful resources and information to maximize the power of IDEA 11, including tutorial videos, over 100 project-ready scripts and customs functions, documentation, webinar access, and much more.

### **Licensing Notes**

- » All IDEA licensing functions such as activation, renewal, revoke require internet access for real-time execution. These functions can also be performed off-line by contacting your IDEA Distributor via email or phone.
- » To ensure uninterrupted access to all the benefits outlined in this document, the IDEA subscription must be renewed by the anniversary date each year.
- » Existing customers with a Support and Maintenance contracts who upgrade to IDEA 11 will be required to adopt the new licensing model.
- » For support on virtual environments, please contact CaseWare IDEA or your local IDEA Distributor.



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The new licensing model that makes IDEA licenses easy to manage i.e. activate, renew, and redeploy. This flexible licensing model can be used for single users and corporate users (on-network as well as off-network).

### Frequently Asked Questions

#### 1. How do I register my copy of IDEA?

After installing IDEA and running it for the first time, you are prompted with two options - 1. Register now, and 2. Register later. Select 'Register Now' and enter the 'Authorization Code' provided by your IDEA Partner. You can also select 'Register Later' and run the CaseWare IDEA License Manager from the Windows Start Menu. In the License Manager, select the 'Register' button and enter your Authorization Code.

#### 2. How long can I use IDEA before I have to register it?

IDEA installs with a Provisional license that lets you use IDEA for three days from the first time you run IDEA, before registration is required.

#### 3. I tried to register my copy of IDEA and the registration failed. What do I do now?

If you attempt to register your license online and this attempt fails, you will get a message that indicates so. This message will have the Authorization Code and the Lock Code. You can provide these values to your IDEA Partner, who will be able to help you finalize the registration.

#### 4. I am unable to register my IDEA installation online. How do I get my offline license key and how do I use it?

Please contact your IDEA Partner to obtain and install an offline license. You will need to provide your Authorization code as well as the Lock Code of your machine to your IDEA Partner.

#### 5. How do I manage my IDEA License?

Licenses can be managed using the CaseWare IDEA License Manager which can be launched from the IDEA section of the Windows Start menu.

#### 6. I am getting a message that says "The product evaluation period has ended." What does this mean?

This means that the 3 day evaluation period has expired and you need to register your copy of IDEA in order to continue using it.

#### 7. How do I renew my IDEA license?

Using the CaseWare IDEA License Manager, locate your IDEA license, click on the associated 'Renew' button. If there is a valid renewal available, the license manager will automatically install it. If you get a message indicating that there is no renewal available, please contact your IDEA Partner.



#### **8. I do not have an authorization code. How do I get one?**

Please contact your IDEA Partner to obtain your authorization code.

#### **9. How can I tell when my IDEA license expires?**

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

- Within IDEA: From the 'File' tab on the 'Help' page under 'About'.
- Within the CaseWare IDEA License Manager.

#### **10. Will IDEA warn me it is going to expire before the actual expiry date?**

Yes, IDEA will automatically warn users of a pending expiry at 60, 30, 15 and 5 days or less remaining.

#### **11. How can I get a Demo or Trial edition of IDEA?**

Please contact your IDEA Partner to get a Trial edition of IDEA.

#### **12. What if I reduce the number of users at annual renewal?**

Users will be able to renew by clicking the 'Renew' button in the 'CaseWare IDEA License Manager' under the 'IDEA' section of the Windows Start menu. If you have reduced to 10 users, then the first 10 users to renew would consume the available renewal. Any unauthorized users should not renew to prevent taking a renewal that should be assigned to an authorized user.

#### **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?**

If you contact your administrator with proof of loss or unrecoverable state, they can arrange for a new activation to be added to your existing authorization code so that you can install IDEA on a new computer.

#### **15. Will my previous Passport credentials still work?**

No, you will have to re-register for Passport. Click on the 'Passport' button within IDEA and follow the registration steps to create your new Passport account.

To learn more about CaseWare Cloud, or for information on how to upgrade, contact us at [analytics@audimation.com](mailto:analytics@audimation.com).

# AUDIMATION

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## About CaseWare IDEA

Audimation Services, Inc. has helped clients throughout the U.S. get maximum value from their data. We provide top-notch support, solutions development and a wide range of resources. Through our long-standing partnership with CaseWare Analytics, we offer professional-grade solutions developed to streamline audits, simplify data acquisition and improve business processes.

## About CaseWare IDEA

CaseWare IDEA is an internationally recognized data analytics software company that provides solutions for auditors, finance professionals and compliance officers in the banking, accounting, government, healthcare, utilities, insurance and online retail sectors. A leader in the audit and accounting industries for over 25 years, IDEAA® 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: from payroll monitoring to providing assurance.

Caseware solutions are used by over 400,000 users, in 130 countries and in 16 languages. To learn more, visit [idea.caseware.com](http://idea.caseware.com).