

The OpenLM Installation Guide

Introduction

These instructions help you to install OpenLM software for Light and Core versions while understanding the options and advantages. Understanding the installation and options will help you choose the proper options for your organization to best audit and manage engineering software licenses for optimal allocation of resources.

In This Guide, Learn to:

- * Understand Options for Installation
- * Install OpenLM Light or OpenLM Core Trial
- * Upgrading to OpenLM Core and Obtaining Licenses
- * Uninstall OpenLM

Understanding Options and Advantages for Installation

OpenLM Light and OpenLM Core are intended to fill different needs. You will want to choose the correct option for installation so you can begin fully exploring the advantages of OpenLM for your business.

The Light version of the software is intended for smaller organizations and the Core version is intended for large organizations which require enterprise-level management. In most cases, it may be advisable to use options for the 30-day trial of the Core version.

The differences and advantages are outlined below.

OpenLM Light:

- * Installer file `openlm_server_win_light_[#].msi`
- * Intended for smaller organizations
- * One year free use of the Light version (renewable)

- * Supports up to 50 users
- * Allows monitoring of 1 vendor

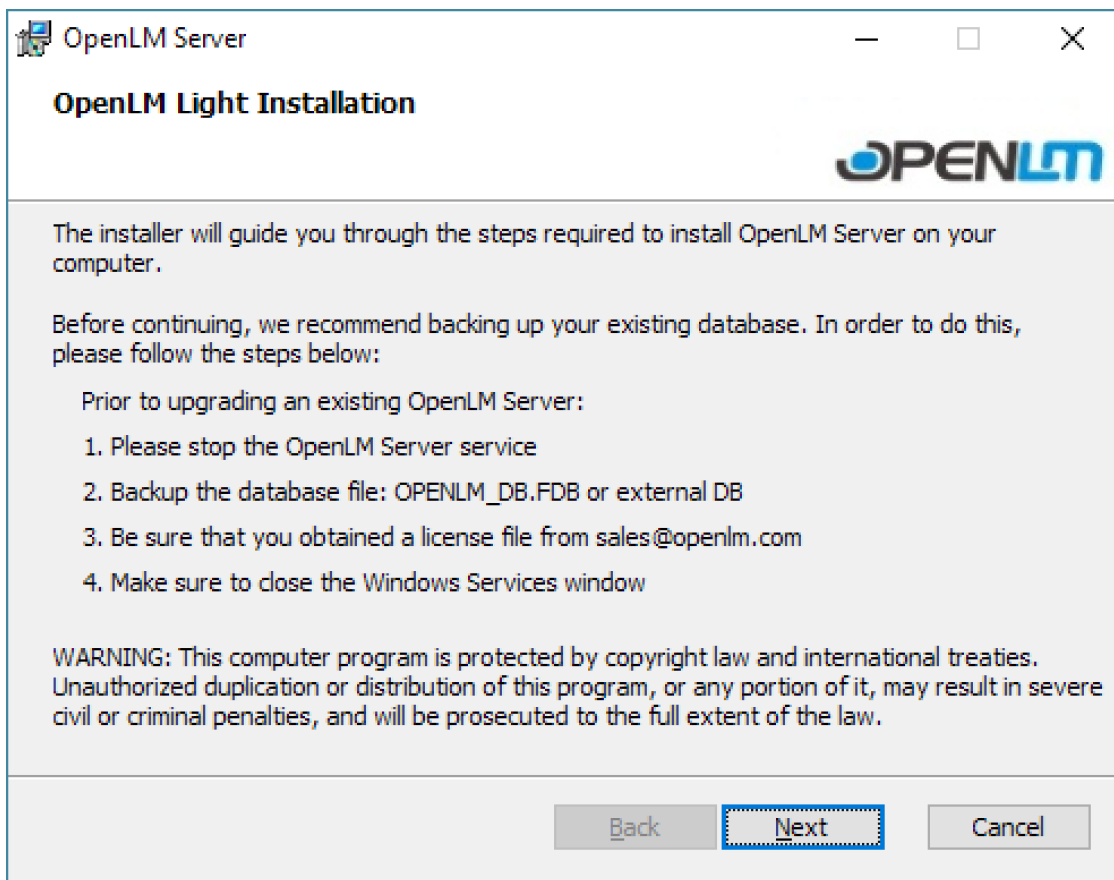
OpenLM Core:

- * Installer file `openlm_server_win_core_[#].msi`
- * Intended for large organizations
- * Allows 30-days free trial of the Core version
- * Supports up to 250 users
- * Allows monitoring of 10 vendor
- * Core installation requires an upgrade before the 30-day trial expires to continue using the software seamlessly. If the trial license expires and becomes outdated, an 'invalid license' message appears on startup. To extend or renew licenses, contact sales (see "Upgrading to OpenLM Core and Obtaining Licenses").

Install OpenLM Light or OpenLM Core Server

Be sure you meet installation requirements for the software before attempting installation. (see: <https://www.openlm.com/openlm-system-requirements-2/>). All organizations may want to consider the Core trial option to explore the full opportunities of using the more robust product.

- 1.** Obtain the installation executable. This can be downloaded from the website (see: <https://www.openlm.com/download/>).
- 2.** After downloading, double-click the installer file. The installation will begin automatically. Depending on the installer, the "OpenLM light Installation" or "OpenLM Core Installation" confirmation screen will appear. Please read the screen and note all options, including backing up any existing database before continuing. This is especially important if you have previously installed the software and want to continue using it without losing any work (e.g., in the case of upgrading to a new version).

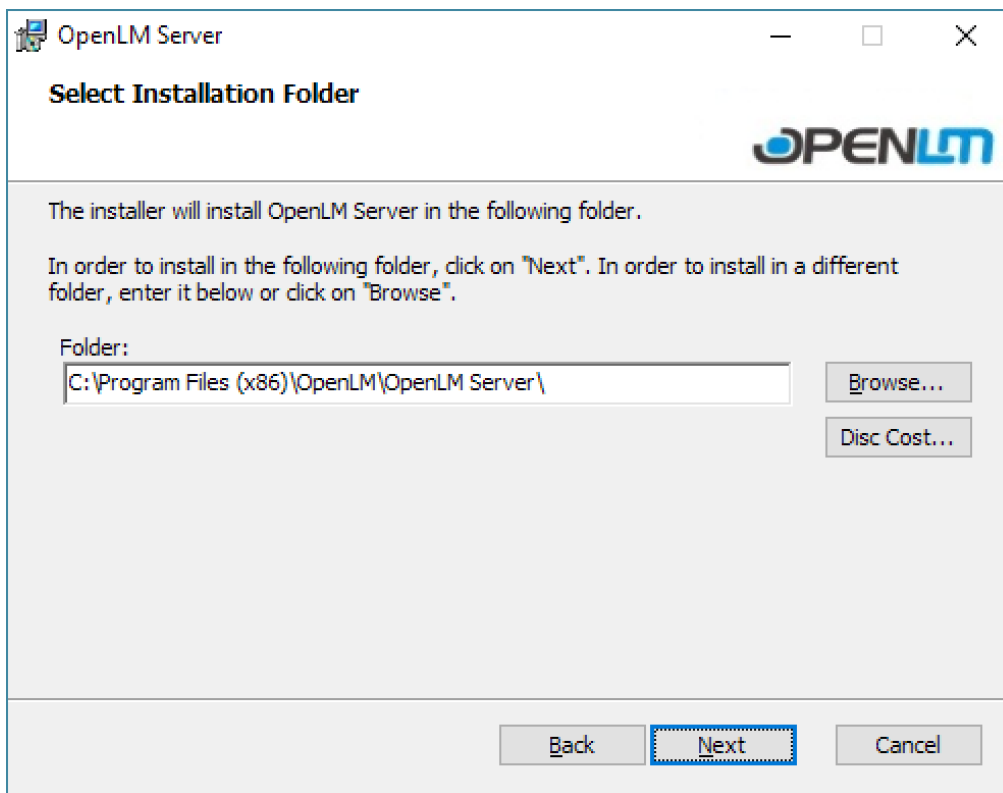


3. Click **[NEXT]** to confirm installation. The “License Agreement” screen will appear. Please read the license agreement.

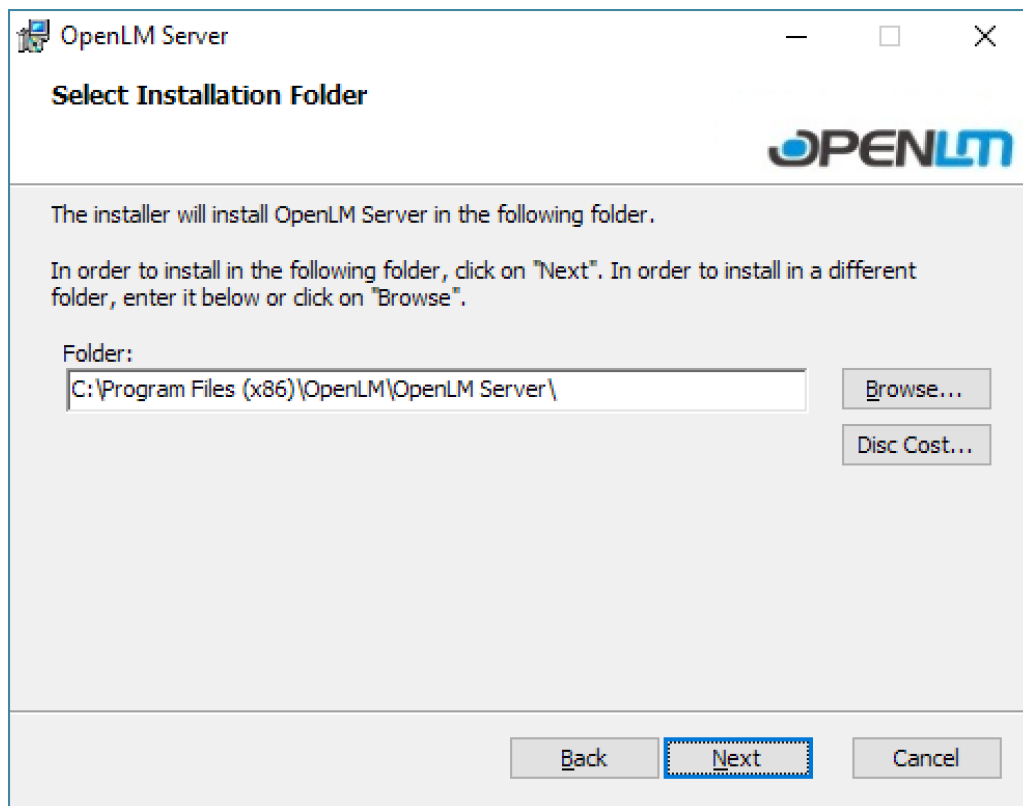


4. When you have read the license agreement, click **I AGREE** and the **[NEXT]** button will become available. You must 'agree' for the **[NEXT]** button to appear; if you do not agree your only options will be to use the **[BACK]** button to return to the introduction screen or **[CANCEL]** to exit the installation.

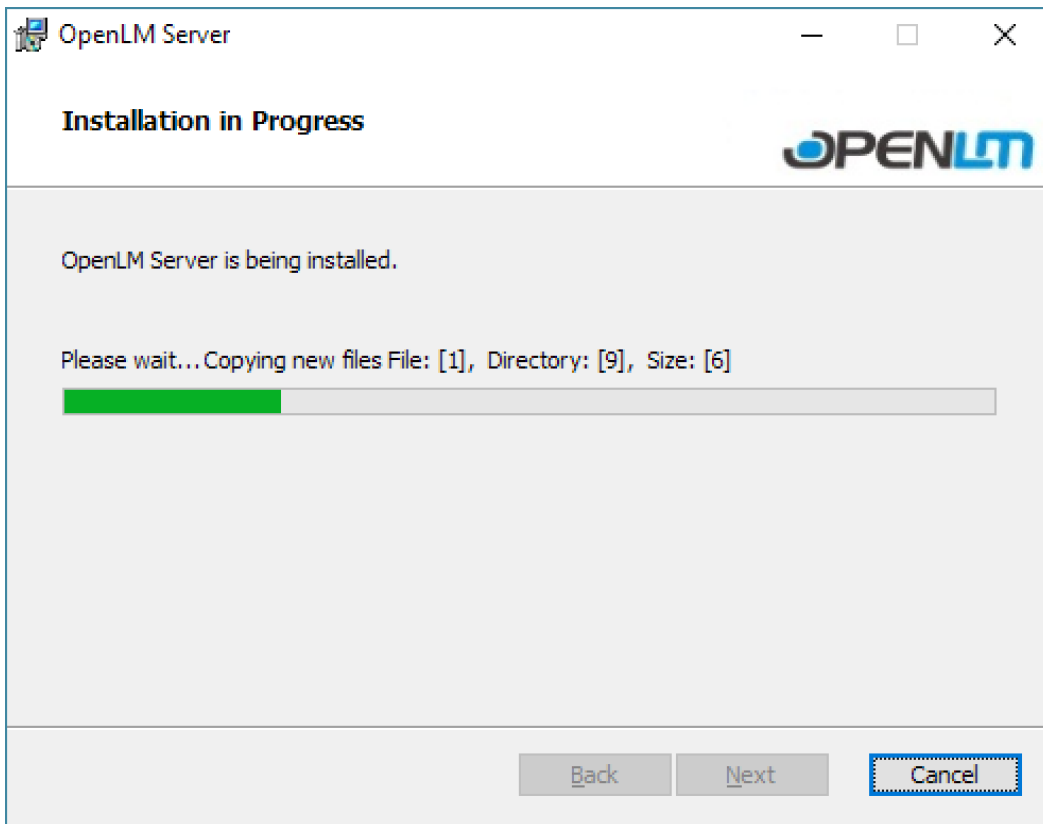
5. Click **[NEXT]**. The "Select Installation Folder" screen will appear.



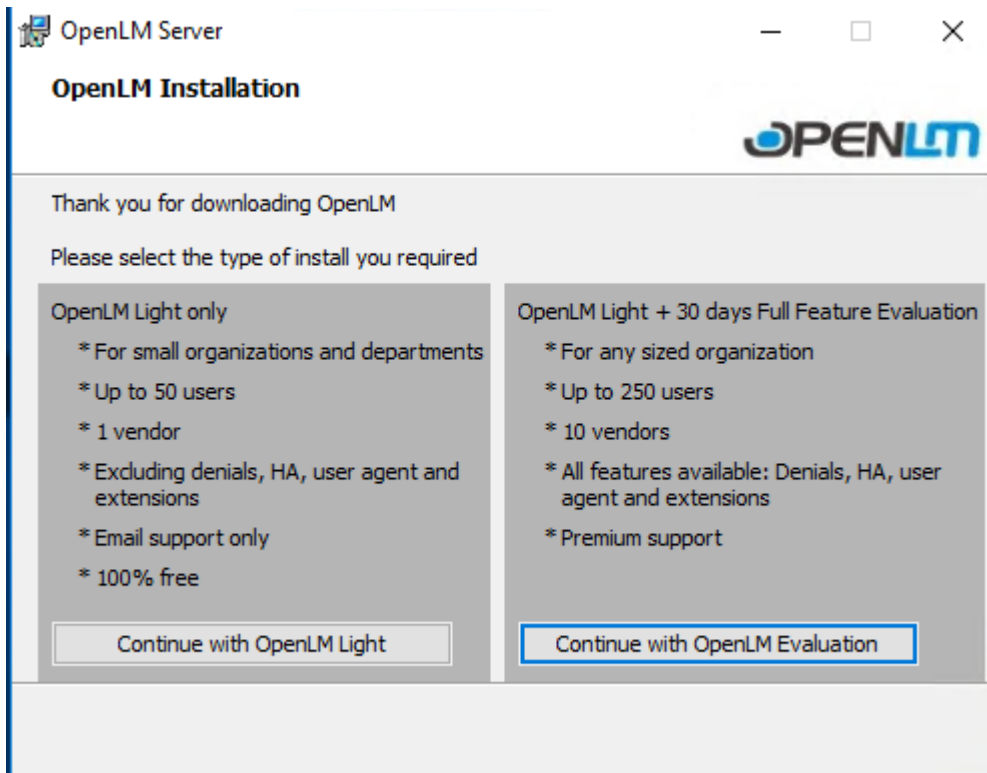
6. The installation folder field will populate with the default path for installation. You can use the **[BROWSE...]** button to choose a new path. The **[DISC COST...]** button allows you to evaluate the available space of current drive installation options. Unless there is a distinct reason to change the path, accept the default by clicking **[NEXT]**. The "Confirm Installation" screen will appear.



7. Click **[NEXT]** to accept installation and start the installation process. The "Installation in Progress" screen will appear. *[Note: Security software may affect progress at this point if it has not been disabled for the installation].*



8. When the progress completes, the “OpenLM Installation” screen will appear.



9. The two choices on the OpenLM Installation will initiate the different installations. For the Light installation/upgrading, choose the option at left **[Continue with OpenLM Light]**. For the OpenLM Core trial version click the option at right **[Continue with OpenLM Evaluation]**.

After making a choice, the “OpenLM License” screen will appear if this is a new installation. Please note the section on the “OpenLM License” screen below (**Section 9.A**). If an existing valid license exists, that license will be used for validation and the installation success screen will appear for the appropriate license. Please see the section on “Installation Success” screens below (**Section 9.B**). **Section 9.C Troubleshooting Installations** discusses potential reasons the installation may fail.

9.A. The OpenLM License Screen

The “OpenLM License” screen offers two options: **I have an OpenLM License** and **Registration is required to activate OpenLM**. To register for a new license, click on **Registration is required to activate OpenLM** (*Section 9.A.1*). To load an existing license, choose **I have an OpenLM License** (*Section 9.A.2*). Existing licenses will be


supplied by OpenLM (please see “Upgrading to OpenLM Core and Obtaining Licenses”).

9.A.1 Registration is required to activate OpenLM

The OpenLM License screen displays when the **Registration is required to activate OpenLM** option is selected and either the **[Continue with OpenLM Light]** or **[Continue with OpenLM Evaluation]** button is clicked.

OpenLM Server

OpenLM License



If you already have a valid license key on your computer, please select it now and click on Next, otherwise please register by entering the details below:

I have an OpenLM license file Choose file

Registration is required to activate OpenLM

First Name *

Last Name *

Organization Name *

Organization Website

Type of Business

Your Job Title

Email *

Phone

Back Next Cancel

Enter required fields. These fields are marked with an asterisk (*) and include **First Name**, **Last Name**, **Organization Name** and **Email**. Additional fields are optional.

OpenLM License

If you already have a valid license key on your computer, please select it now and click on Next, otherwise please register by entering the details below:

I have an OpenLM license file
 Choose file

Registration is required to activate OpenLM

First Name *	Type of Business
<input type="text" value="User"/>	<input type="text"/>
Last Name *	Your Job Title
<input type="text" value="Name"/>	<input type="text"/>
Organization Name *	Email *
<input type="text" value="Organization"/>	<input type="text" value="user.name@org.com"/>
Organization Website	Phone
<input type="text"/>	<input type="text"/>

Once the required fields are populated, click **[NEXT]**. After clicking **[NEXT]** the successful installation screen will appear. If you attempt to complete the registration without filling in the required information — or fill it out improperly — an error screen will appear noting which fields have not been completed. Please note the following rules:

* First Name and Last Name fields can only contain letters, numbers, hyphens, underscores or spaces.

* Organization names should contain only letters and numbers.

* Email addresses should be valid and properly formed — no spaces, inclusive of an '@' symbol and proper domain extension.

Upon completion, the appropriate “Installation Success” screen will appear. See section **9.B Installation Success Screens**.

9.A.2 I have an OpenLM License

Users with a valid license they wish to use for installation should choose the **I have an OpenLM License** option. If you are installing to a machine that does not have an internet connection, you must obtain a license separately and make the installation using this option. After you select the **I have an OpenLM License** option, the **[Choose File]** button will become available.

Click the **[Choose File]** button to open an Explorer window and navigate to locate the license file(s) you want to load. When the file(s) is(are) located, click to select, then click the **[OPEN]** button on the Explored window. This will return you to the “OpenLM License” screen, which will remain unpopulated.

Note that during selection, more than one license file can be selected. This comes into play when testing additional module functionality such as OpenLM Broker, OpenLM Agent, OpenLM Router, and OpenLM Scheduler. If you are loading more than one file, they need to be located in one folder.

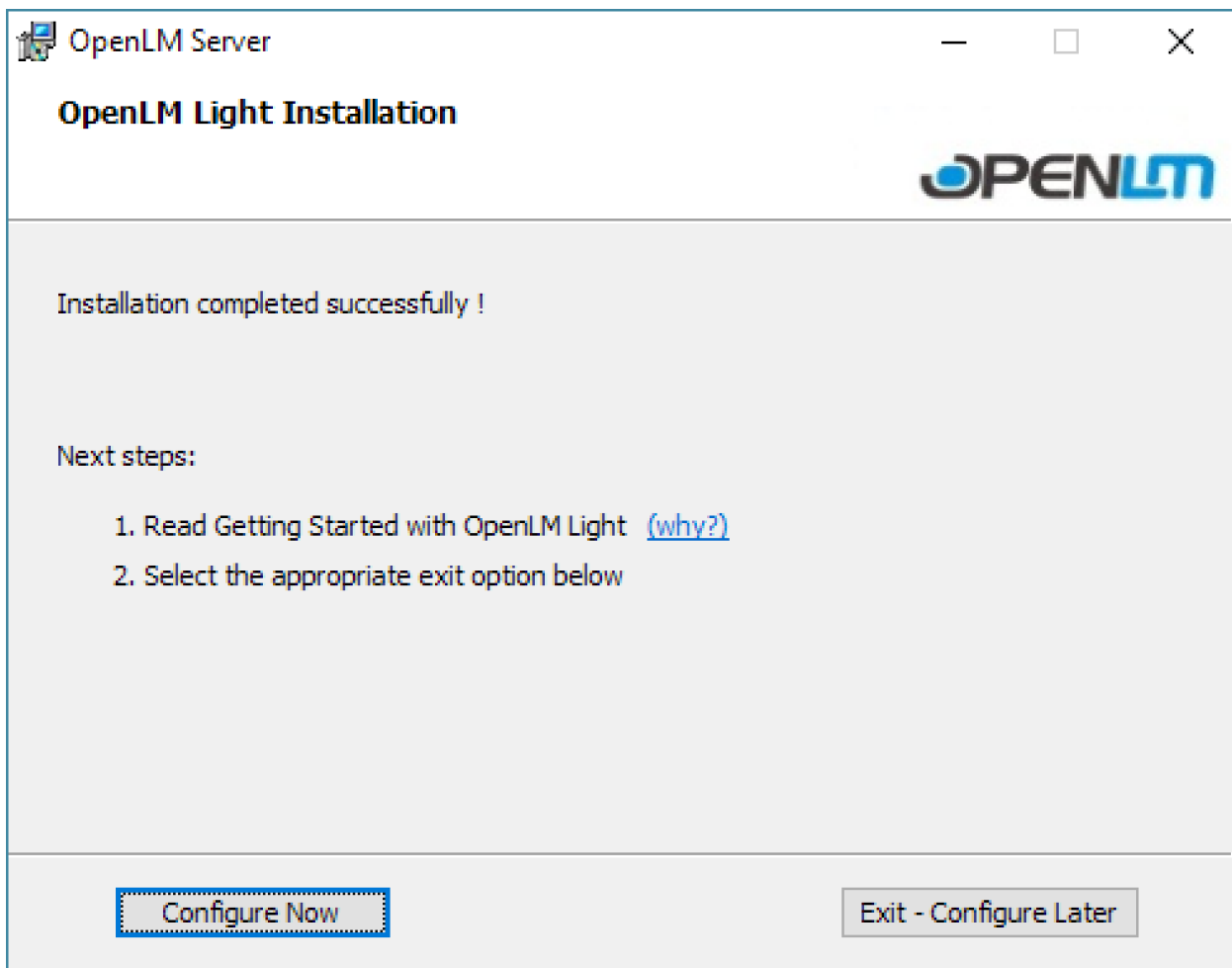
Click **[NEXT]** to complete the installation. Note that the installer will take the license files and place them appropriately in the OpenLM file structure.

9.B. Installation Success Screens

Depending on whether you chose to install the Core trial or the Light version of the software the “Installation Success” screen will have a different appearance, addressing the specific concerns of the version you have installed. See “9.B.1 The OpenLM Light Installation Success Screen” if installing the Light version; see “B.2 The OpenLM Core Installation Success Screen” if installing the Core trial version.

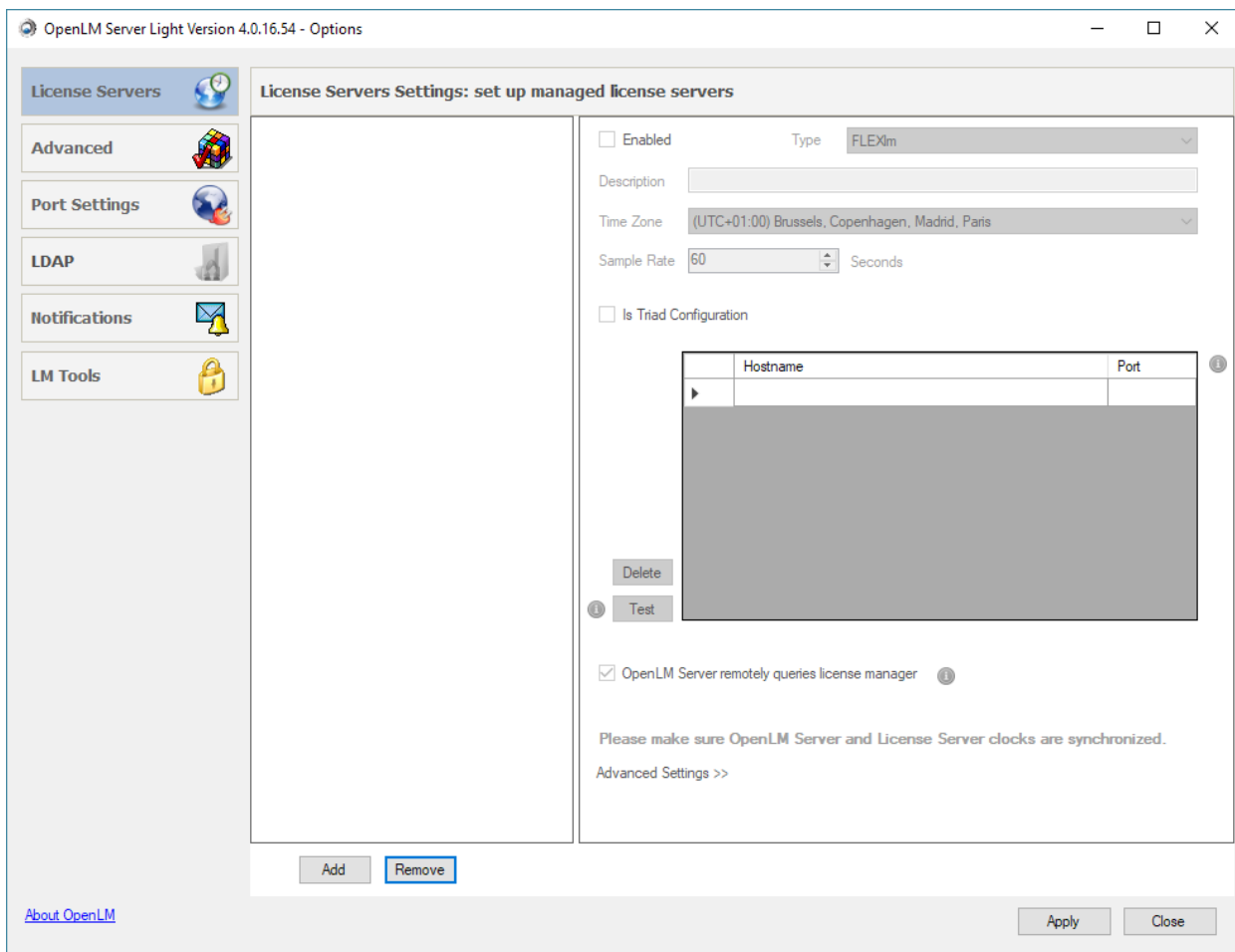
9.B.1 The OpenLM Light Installation Success Screen

The “OpenLM Light Installation” success screen confirms your successful installation of the Light version of the software and offers a link to helping you get started using the software.



Clicking the **[WHY]** link in the list of “Next Steps” is highly recommended for beginning a quicker, more satisfactory experience with the software. The link leads to a web page that explains completing configuration. Note that you need a live internet connection to access the link and information.

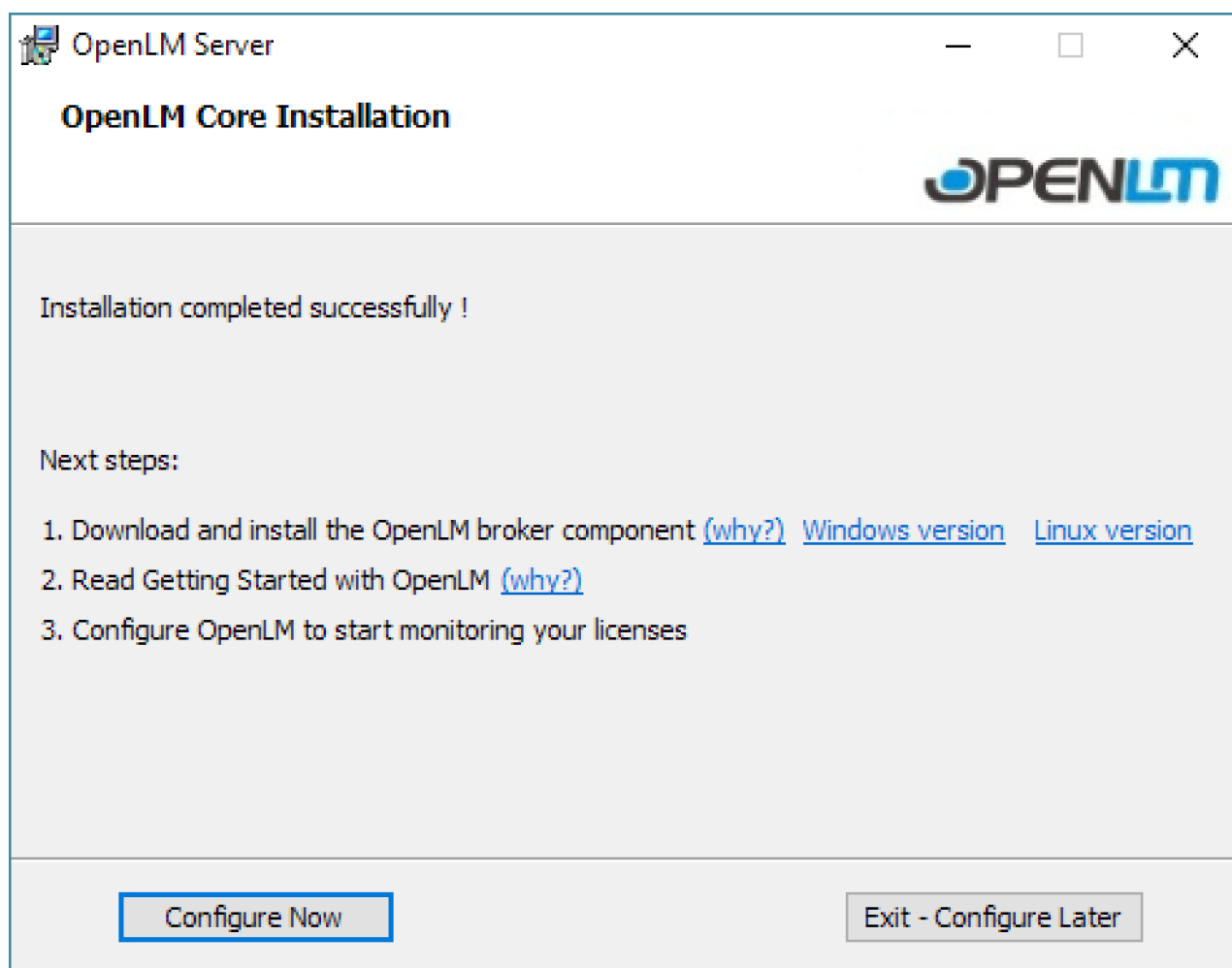
Clicking **[Configure Now]** will open the “Configuration” screen. Clicking **[Exit – Configure Later]** will exit the installer. To access the Configuration module after exiting, choose **Start>OpenLM>Configure Open LM Server**.



To add server licenses, please see [additional documentation](#) to complete setup.

9. B.2 The OpenLM Core Installation Success Screen

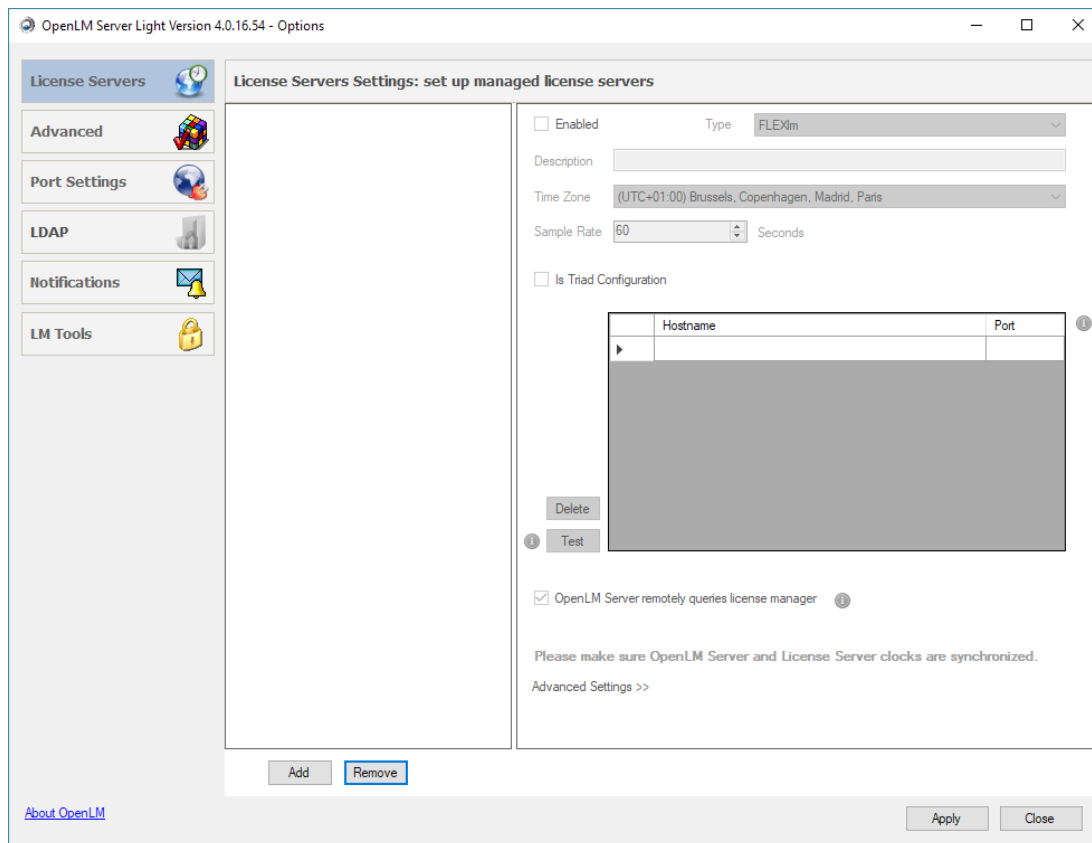
The “OpenLM Core Installation” success screen confirms your successful installation of the Core version of the software. It offers several options to help improve your experience with the software.



The first option under “Next Steps” is an option that is strongly suggested for Core users to download and install OpenLM Broker. Clicking the **[WHY]** link brings users to a video which explains some of the detail and advantages. Convenient links to the **[WINDOWS VERSION]** and **[LINUX VERSION]** of OpenLM Broker are available on the screen. You must have an active internet connection to access these downloads. The links will bring you to a registration form which enables an added level of service, but the download can be completed without registration by scrolling down to the “**No, Thanks. Skip registration for now**” option.

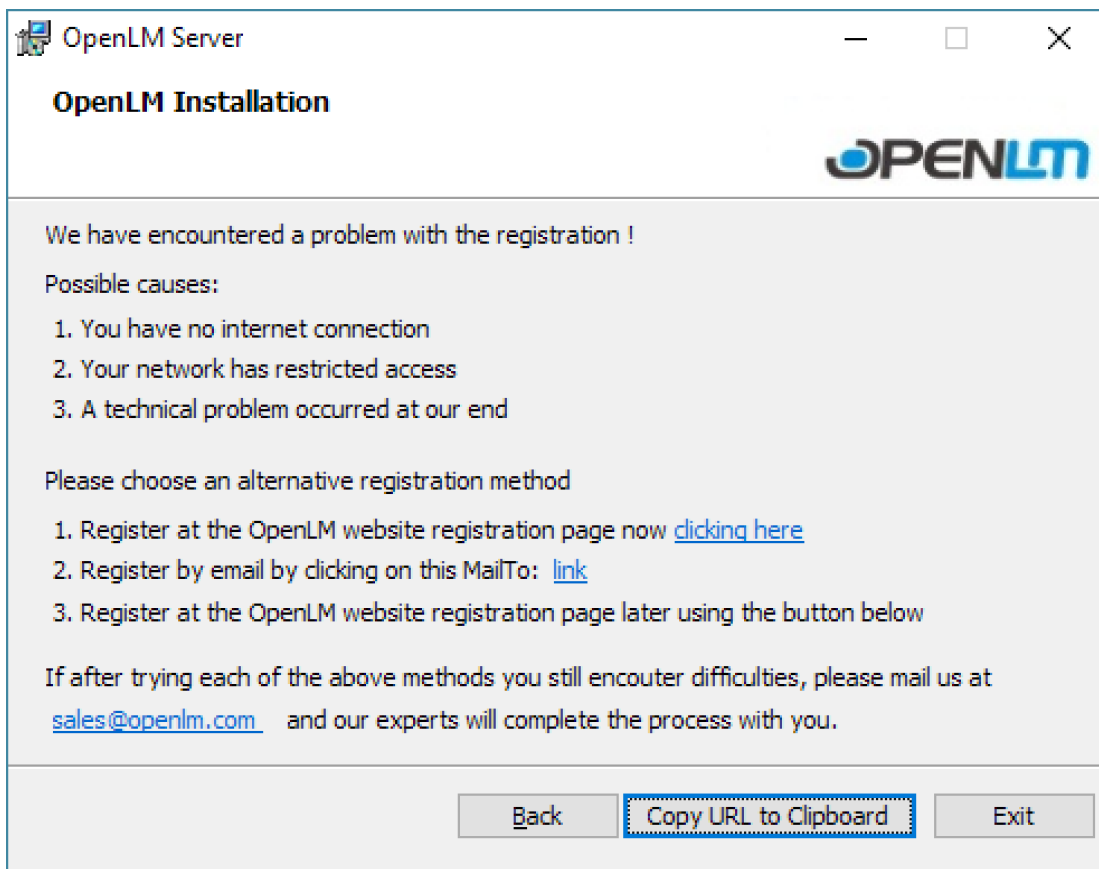
A second suggestion is intended to helping users get started using the software. Clicking **[WHY]** is highly recommended for having a quicker, more satisfactory experience with the software. The link leads to a web page that explains completing configuration. Note that you need a live internet connection to access the information.

Clicking **[Configure Now]** will open the “Configuration” screen. Clicking **[Exit — Configure Later]** will exit the installer. To access the Configuration module after exiting, choose **Start>OpenLM>Configure Open LM Server**.



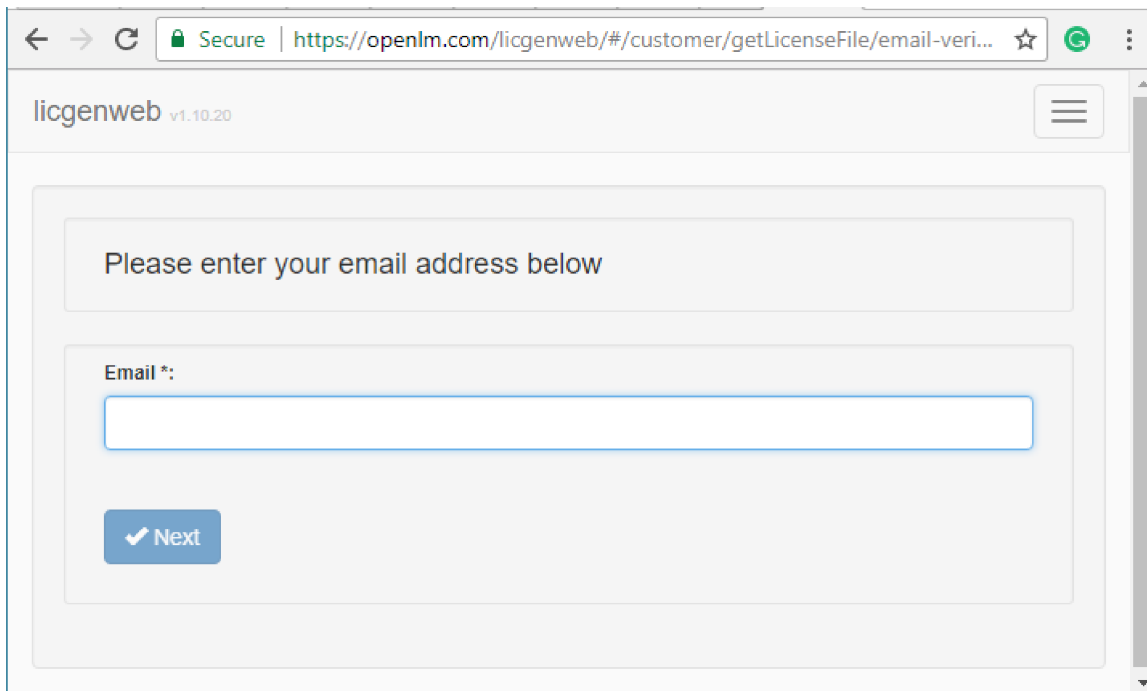
9. C Troubleshooting Installations

The OpenLm Installer will detect when most issues occur with an installation/registration. A helpful screen will appear with suggestions, options and links. Most issues during installation will involve internet connection or lack thereof.



Checking your internet connection is the first action to pursue. The connection may be down, even temporarily, on either side of the transaction. Restarting the router is also an option.

The links on the form provide several useful options. **[CLICKING HERE]** opens a URL with a web page that has a simple web form for entering and submitting your email address for response (See example screen below). Use the same email that was used when creating the registration. Entering the email address will create the relevant license and download it to your machine when the **[NEXT]** button is clicked. The URL has encrypted information to ensure privacy. **[COPY URL TO CLIPBOARD]** copies the same encrypted web address so it can be transferred to another machine with internet access if the current machine is not set up for it.



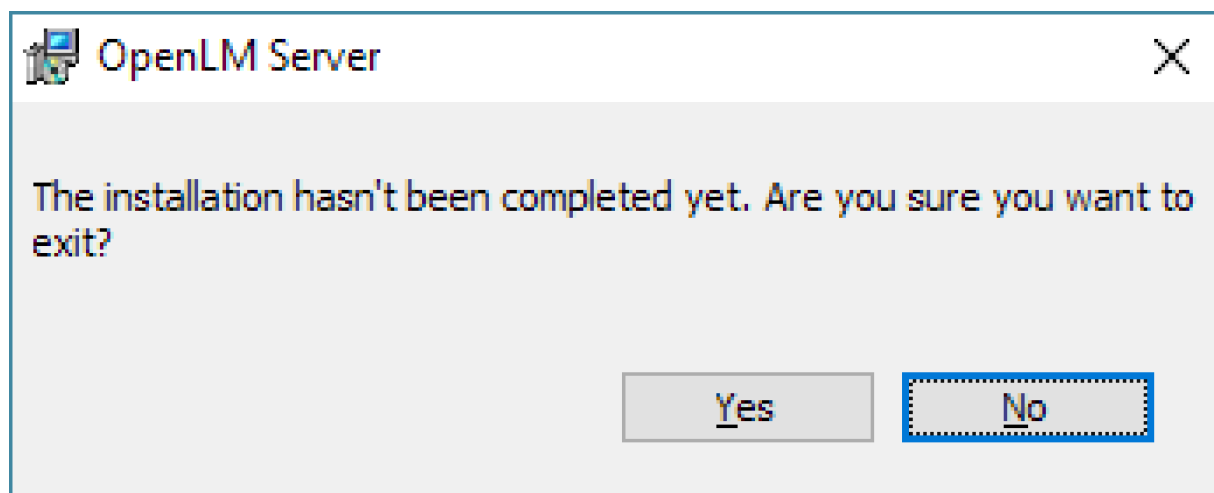
The screenshot shows a web browser window with the URL <https://openlm.com/licgenweb/#/customer/getLicenseFile/email-veri...>. The page title is "licgenweb v1.10.20". The main content area contains a form with the following elements:

- A heading: "Please enter your email address below"
- A label: "Email *:"
- An empty text input field for the email address.
- A blue button with a checkmark icon and the text "Next".

Clicking **[LINK]** on the "OpenLM Installation" screen locates the default email client on the current machine and creates an email containing the 'To' address (sales@openlm.com), 'Subject' (Requesting for a license file from OLM installer), and form data from the registration as the 'Body' of the email.

The highlighted email address **sales@openlm.com** is information only. It will not kick off the automated process initiated by clicking **[LINK]**.

Clicking **[BACK]** returns the user to the OpenLM License form. Clicking **[EXIT]** calls a confirmation screen warning that the user will be exiting the installation.



Clicking **[YES]** on the confirmation exits the installer without completing the registration. Clicking **[NO]** returns the user to the "OpenLM Installation" screen.

Upgrading to OpenLM Core and Obtaining Licenses

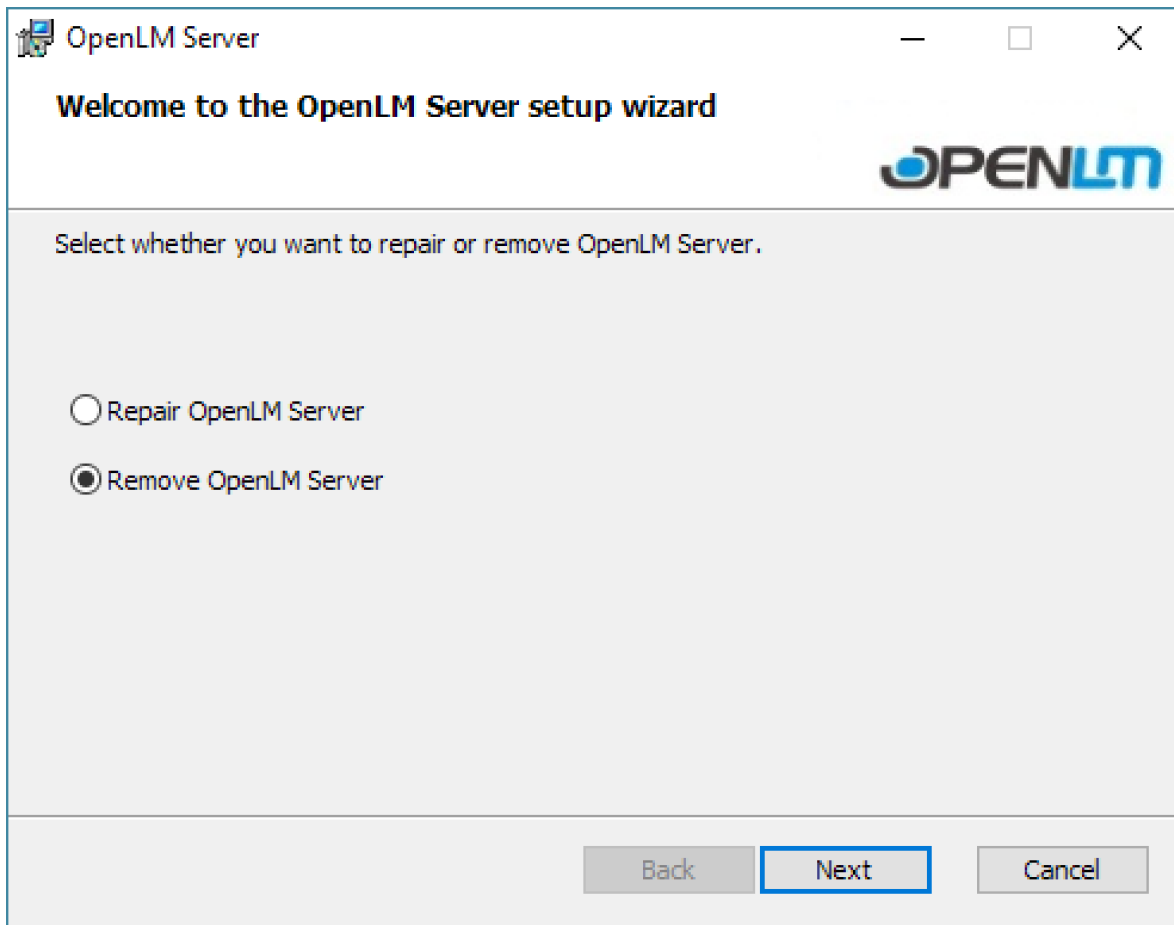
Should you decide to upgrade to standard licensing to take full advantage of the software and avoid service interruption, you can do so by contacting our sales team. Please contact sales via email (sales@openlm.com) or use the form on the website: <https://www.openlm.com/contact-sales/>.

Users of the Core Trial version will be prompted for upgrading or continuing with the Light version after the 30-day trial period expires.

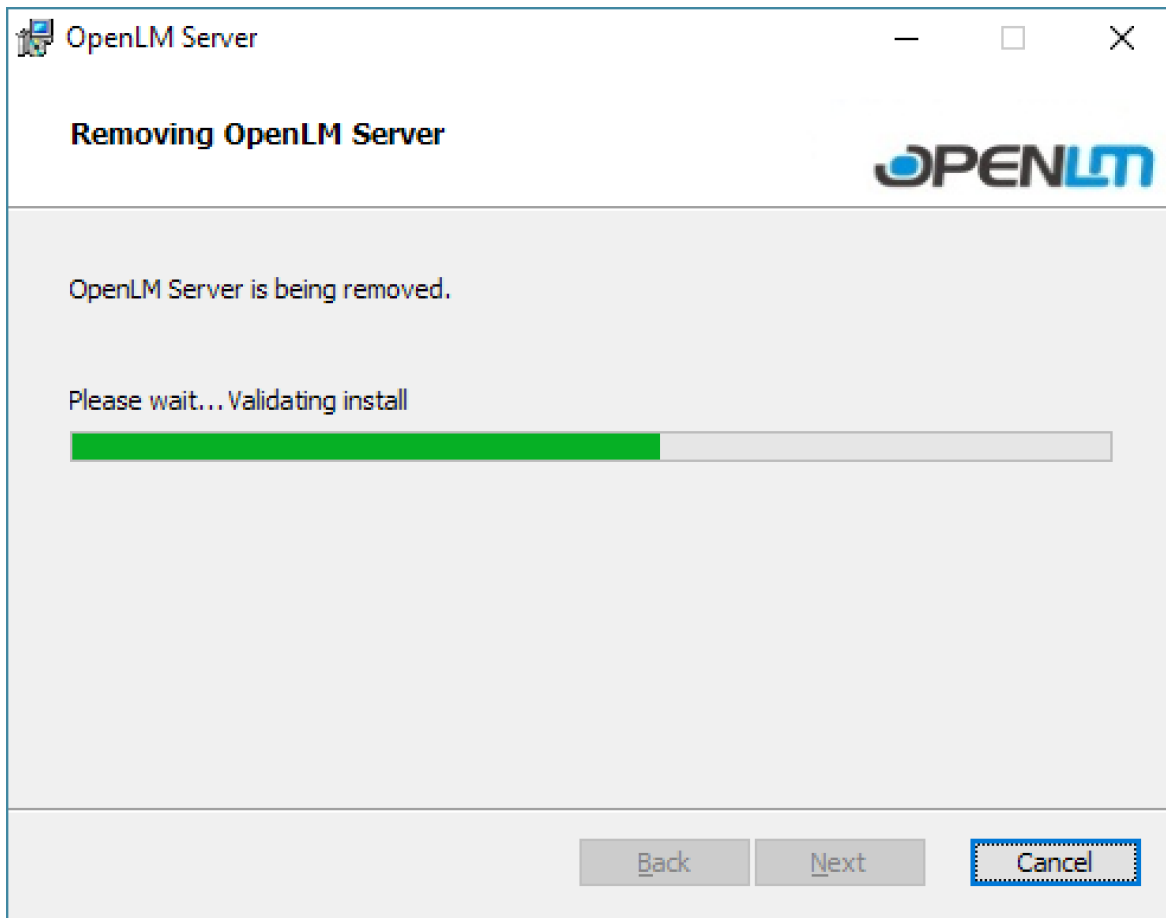
Uninstalling OpenLM (Any Version)

Uninstalling the software can only occur after successful installation. All versions follow the same steps for uninstalling.

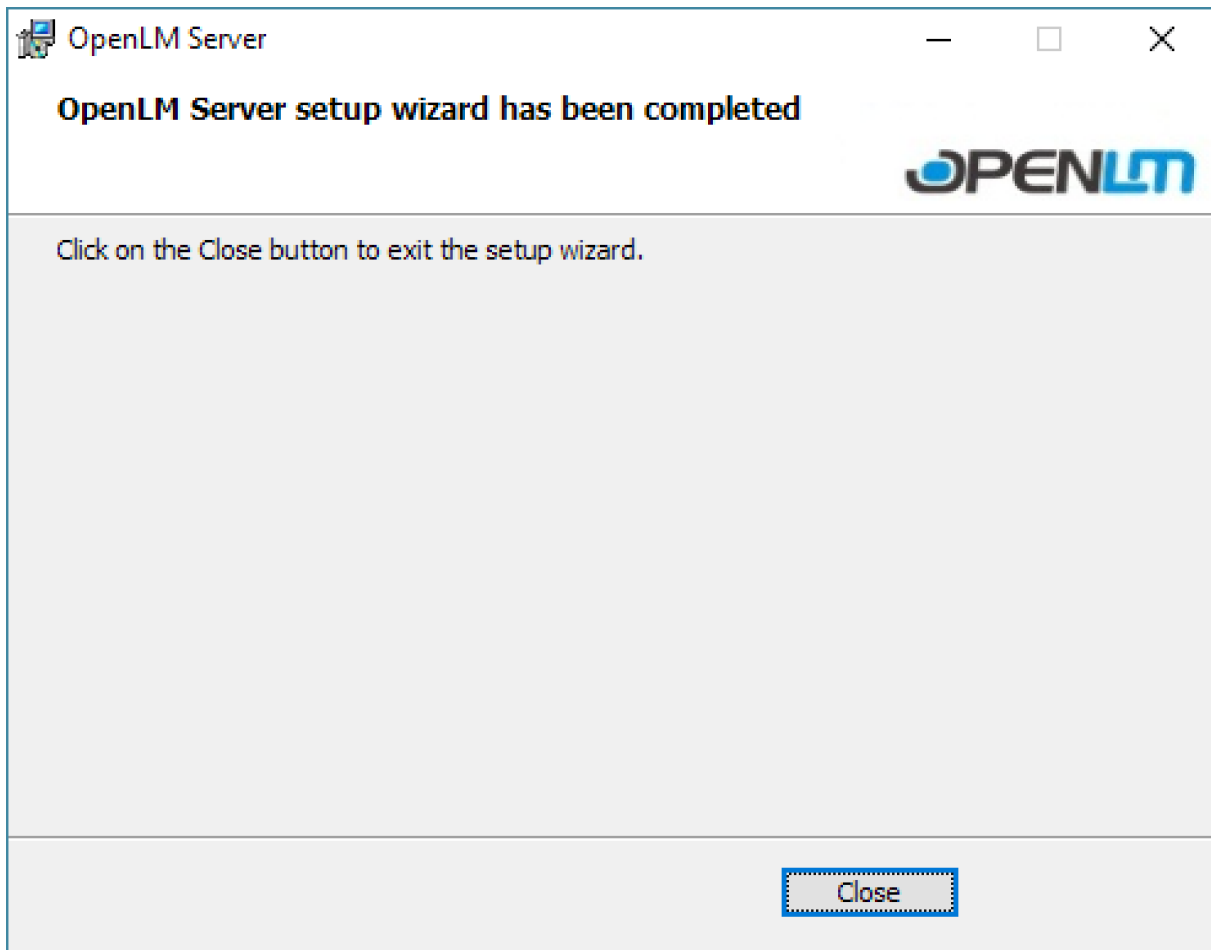
1. Double click on the installer used to begin installation of the software. The "Setup Wizard" will appear.
2. Choose "Remove OpenLM Server" as pictured.



3. Click **NEXT**. The “Removing OpenLM Server” screen will appear.



4. When the process of uninstalling is completed, a confirmation screen will appear saying that the software has been successfully uninstalled.



5. Click **CLOSE** to complete the process.

The installer does leave several folders in the system located here by default: C:\Program Files (x86)\OpenLM. The files include license, log and database files. They will have to be manually removed from the system to completely uninstall.