

# IP *edge*®

## Virtual Licensing Service User Guide

# Publication Information

**Toshiba America Information Systems, Inc.  
Telecommunication Systems Division**

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## General End User Information

### FCC Requirements

Means of Connection: The IPedge does not connect directly to the telephone network. All direct connections are made to a gateway. Please refer to the gateway manufacturer's documentation

### Radio Frequency Interference

Warning: This equipment generates, uses, and can radiate radio frequency energy and if not installed and used in accordance with the manufacturer's instruction manual, may cause interference to radio communications. It has been tested and found to comply with the limits for a Class A computing device pursuant to Subpart J of Part 15 of FCC Rules, which are designed to provide reasonable protection against such interference when operated in a commercial environment. Operation of this equipment in a residential area is likely to cause interference, in which case, the user, at his/her own expense, will be required to take whatever measures may be required to correct the interference.

### Underwriters Laboratory

This system is listed with Underwriters Laboratory (UL). Secondary protection is required, on any wiring from any telephone that exits the building or is subject to lightning or other electrical surges, and on DID, OPS, and Tie lines. (Additional information is provided in this manual.)



### CP01, Issue 8, Part I Section 14.1

Notice: The Industry Canada label identifies certified equipment. This certification means that the equipment meets certain telecommunications network protective, operational and safety requirements as prescribed in the appropriate Terminal Equipment Technical Requirements document(s). The Department does not guarantee the Equipment will operate to the user's satisfaction.

**Repairs to Certified Equipment** should be coordinated by a representative designated by the supplier. Any repairs or alterations made by the user to this equipment, or equipment malfunctions, may give the telecommunications company cause to request the user to disconnect the equipment.

Users should ensure for their own protection that the electrical ground connections of the power utility, telephone lines and internal metallic water pipe system, if present, are connected together. This precaution may be particularly important in rural areas.

Before installing this equipment, users should ensure that it is permissible to be connected to the facilities of the local telecommunications company. The equipment must also be installed using an acceptable method of connection. The customer should be aware that compliance with the above conditions may not prevent degradation of service in some situations.

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**CAUTION!** Users should not attempt to make such connections themselves, but should contact the appropriate electric inspection authority, or electrician, as appropriate.

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**Hearing Aid Compatibility Notice:** The FCC has established rules that require all installed business telephones be hearing aid compatible. This rule applies to all telephones regardless of the date of manufacture or installation. There are severe financial penalties which may be levied on the end-user for non-compliance.

<b>Regulatory Information</b>		
<b>Area</b>	<b>United States</b>	<b>Canada</b>
Safety	ULn	CSA
Network	FCC CFR 47 Part 68 TIA/EIA/IS-968	IC CS-03
EMC	FCC CFR 47 Part 15	ICES003:2004

### **Emergency Service (911) Warning**

The IPedge system must have a constant source of electricity and network connection availability to function. In the event of a power failure or network availability outage the IPedge system's SIP service will be disabled. The user understands that in the event of a power or network outage the IPedge system will not support 911 emergency services and further, that such services will only be available via user's regular telephone line not connected to the IPedge system or gateway. User further acknowledges that any interruption in the supply or delivery of electricity or network availability is beyond Toshiba's control and that Toshiba shall have no responsibility for losses arising from such interruption.

### **Security Warning**

All IPedge systems ship with the same default user names and passwords. To help protect your IPedge system from unauthorized administrator access change the user names and passwords as described in the new system installation section of the IPedge Install manual. An IPedge system that is not properly protected may be exposed to toll fraud, denial of service or other attacks.

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## **Telecommunication Systems Division**

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Under no circumstances will the retail customer or any user or dealer or other person be entitled to any direct, special, indirect, consequential, or exemplary damages, for breach of contract, tort, or otherwise. Under no circumstances will any such person be entitled to any sum greater than the purchase price paid for the item of equipment that is malfunctioning.

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**TOSHIBA AMERICA INFORMATION SYSTEMS, INC.**  
**Contrat de licence d'utilisation**

Toshiba America Information Systems, Inc. Telecommunication Systems Division 9740 Irvine Boulevard  
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# Contents

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## Chapter 1 – Virtual Licensing Service Overview

LICENSING SERVICE .....	1
Online Virtual License Service Overview .....	1
VIRTUAL LICENSING SERVICE CONTACT .....	2
SYSTEM REQUIREMENTS .....	3
OFF LINE DONGLE BASED LICENSING .....	3
IPedge ES LICENSE PROCEDURE .....	4
UPGRADE to VERSION 1.7.x .....	6
License Conversion .....	6
Software Upgrade .....	6
PERPETUAL LICENSE .....	6
License Upgrade .....	6
TRIAL LICENSE .....	7
SYSTEM TYPE VERIFICATION .....	8
IPedge VIRTUAL LICENSING OVERVIEW .....	8
IPedge Host ID .....	9
Transfer Licenses .....	9
Revoke License .....	9
System Type Verification .....	9
SYSTEM SUPPORT and UPGRADE SERVICE .....	9
SUS Expired Indication .....	9

## Chapter 2 – Customer Setup

NEW CUSTOMER SITE .....	11
NEW CUSTOMER SETUP .....	11
Add A Customer Site .....	12
Create or Edit a Site .....	12
LICENSE GENERATION .....	13
LICENSE APPLICATION .....	14
On-Line Virtual Licensing .....	14
Off-Line Dongle Licensing .....	15
IPedge ES Licensing .....	15
License Upgrade .....	15
LICENSE TRANSFER .....	16
Public IP Address Change .....	16

MAINTENANCE LICENSE (SUS) . . . . .	17
SUS expired indication . . . . .	17
TASKE . . . . .	17
MODEL DATABASE . . . . .	18

### **Chapter 3 – Enterprise Manager License Control**

SYSTEM PROGRAMMING . . . . .	21
System Type Verification . . . . .	21
INITIAL SYSTEM SETUP . . . . .	22
Initial Setup At The Customer Site . . . . .	22
INITIAL LICENSE . . . . .	24
On-Line Virtual License . . . . .	24
Off-Line Dongle License . . . . .	24
IPedge ES License . . . . .	24
LICENSE CONTROL . . . . .	24
Button Functions . . . . .	24
Display / Apply License . . . . .	25
OFF-LINE LICENSING . . . . .	25
Download License File . . . . .	25
Upload and Apply License . . . . .	26
IPedge ES LICENSING . . . . .	26
Move System to Customer Site after Initial Setup . . . . .	26
Replace a Damaged IPedge Server . . . . .	27
Purchase Additional License . . . . .	27
ADMINISTRATION NOTIFICATION SETTINGS . . . . .	28
MULTI-NODE SYSTEMS . . . . .	28
VIRTUAL LICENSE SERVICE FLOW CHART . . . . .	29

### **Chapter 4 – System Upgrade to Virtual Licensing**

UPGRADE TO VIRTUAL LICENSING . . . . .	31
Preparation . . . . .	31
MAINTENANCE RENEWAL . . . . .	31
SYSTEM UPGRADE . . . . .	31
Software Version 1.7.0 Systems . . . . .	32
Software Version 1.6 and Earlier Systems . . . . .	32
Database Conversion Service . . . . .	32
Re-Image to R1.7 . . . . .	32
Requirements . . . . .	32
DATABASE UPGRADE . . . . .	33
IPedge Systems . . . . .	33
MAS . . . . .	33
Meeting . . . . .	33
TRANSFER LICENSES to ANOTHER PLATFORM . . . . .	33
Upgrade an Existing Machine . . . . .	34
System Upgrade Inquiry . . . . .	39
Verify the SUS Renewal . . . . .	40

TRANSFER LICENSES to ANOTHER PLATFORM. . . . .	41
Change from On-line Virtual License to Off-line Dongle License . . . . .	42
USB Pass-through Setup . . . . .	43
OFF-LINE LICENSING . . . . .	44
Download License File . . . . .	44
Upload and Apply License . . . . .	44
Display License Information . . . . .	44

**Chapter 5 – Maintenance Renewal**

MAINTENANCE RENEWAL . . . . .	47
Verify the SUS Renewal . . . . .	47





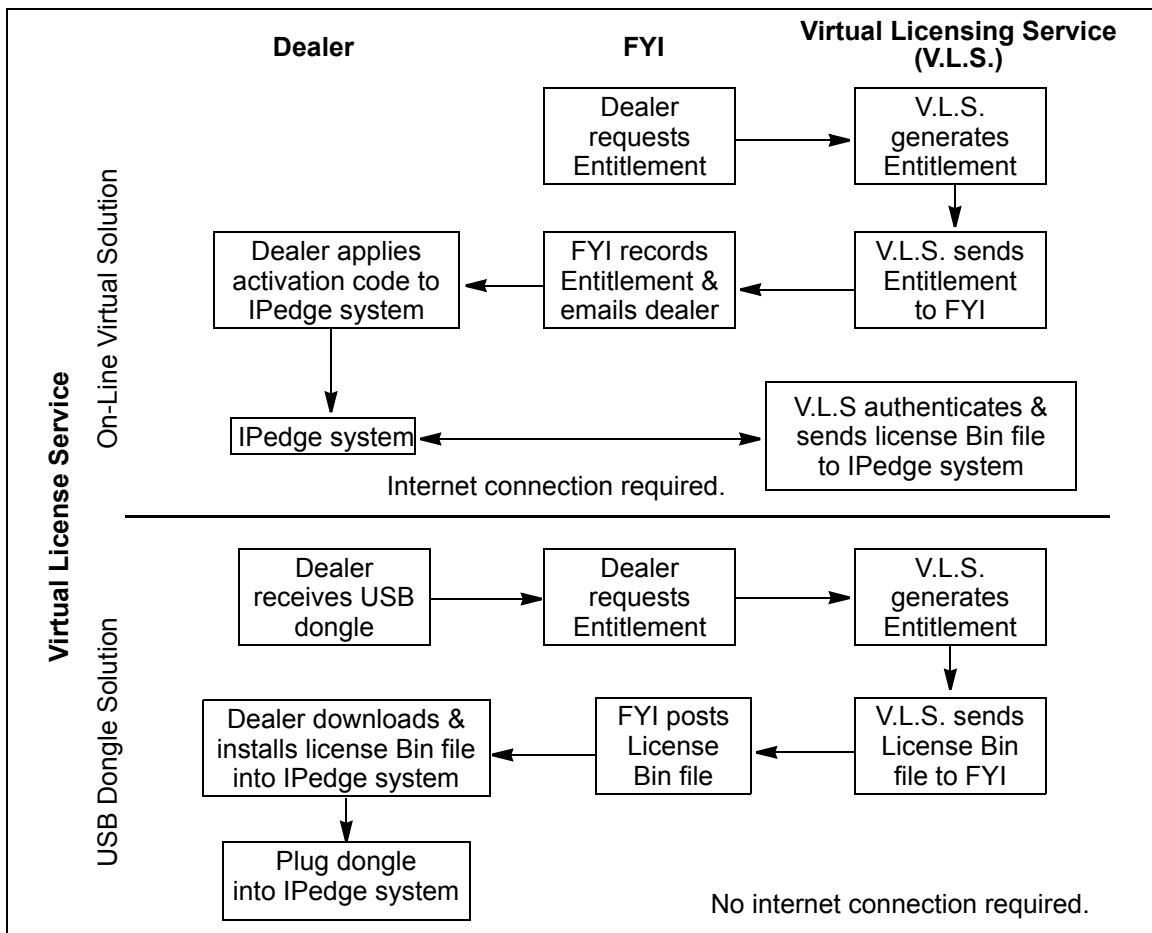
# Virtual Licensing Service Overview

# 1

## LICENSING SERVICE

IPedge systems running 1.7 and later software use Toshiba's Virtual Licensing Service. The virtual licensing service is integrated with Toshiba's FYI order management system.

IPedge EC, EM and, EP systems running 1.7.4 software have two different licensing options. [Online virtual license service](#) and an [off line dongle license](#) system. The [IPedge ES](#) system uses a unique licensing process.



### Online Virtual License Service Overview

The IPedge virtual licensing service eliminates the need to manually load a file onto the IPedge server or attach a dongle to the server chassis. The virtual licensing service also allows the transfer of licenses from one server to another, such as from a failed server to a replacement sever.

The steps shown below is a summary of the licensing process.

- The dealer contact setups a customer site in Toshiba's FYI Licensing Service web site.
- The dealer purchases licenses. Those licenses go into the dealer's inventory.
- The dealer logs in to the customer site on the licensing service to Request a New License. The licenses are selected from the dealers inventory.
- When the dealer contact submits the request and accepts the dealer EULA, the licensing service sends an email requesting the user contact to accept the EULA.
- When the dealer and the user have both accepted the EULA a 16-character license key is sent to the dealer contact.
- The dealer technician enters the license key during the IPedge System Setup.
- The IPedge system contacts the license server with the license key.
- The license server sends the license string to the IPedge system to enable the licensed features. This binds the licenses to the IPedge server. Refer to [Figure 1](#).

## VIRTUAL LICENSING SERVICE CONTACT

The IPedge system will attempt to contact the Virtual Licensing Service as shown below.

- **Call Home** — Every seven days, the IPedge system checks for new licenses and software updates. If new licenses or software updates are available notice will be shown in Enterprise Manager. Click on the **Apply** icon in Enterprise Manager to apply the licenses and software updates.
- **Refresh** (Administrator clicks on the **Refresh** icon in the License Control page in Enterprise Manager.) — Checks for new licenses, and software updates.
- **Apply** (Administrator clicks on the **Apply** icon in the License Control page in Enterprise Manager.) — Click on the Apply icon in Enterprise Manager to apply the licenses and software updates.

- **Reboot** — When the IPedge system reboots, the system checks for new licenses, and software updates. New licenses and software updates are applied. The system reboot resets the seven day call home clock.

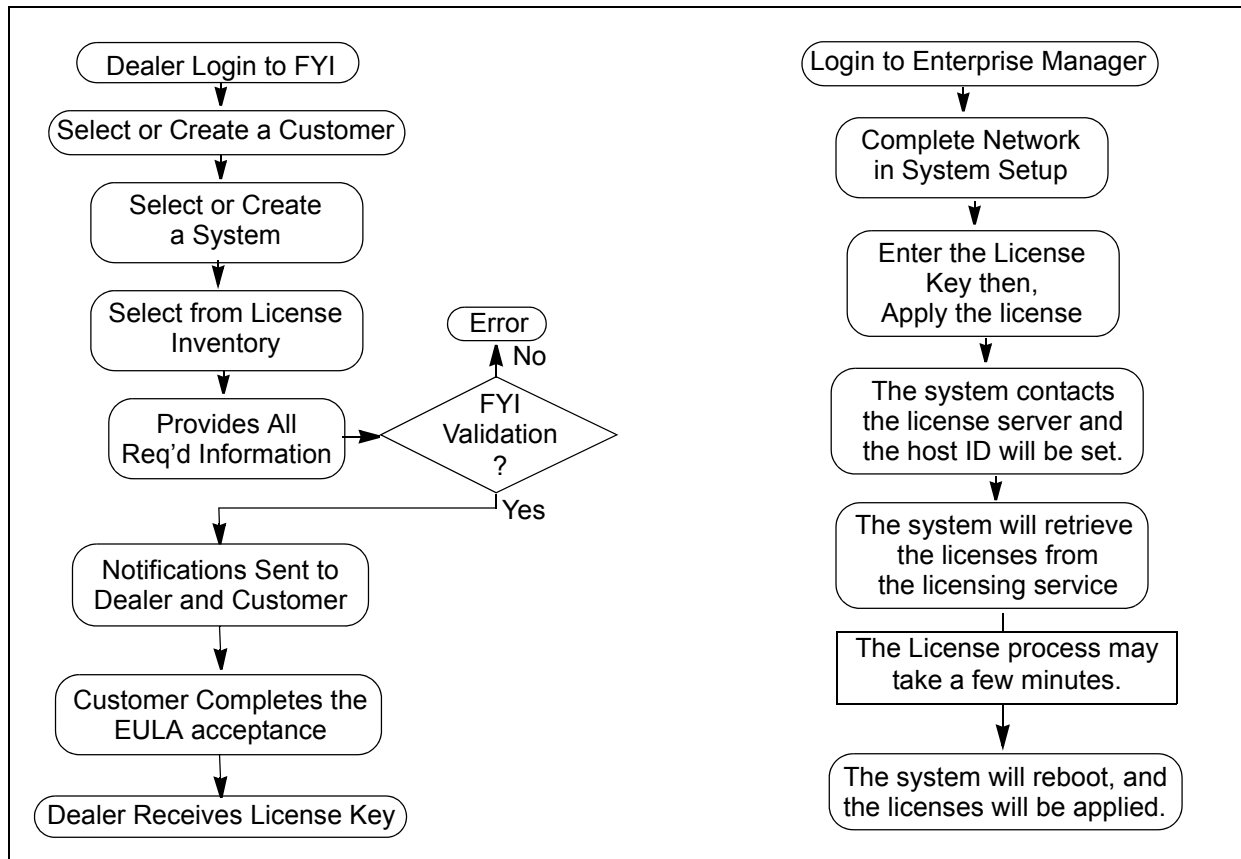


Figure 1 – IPedge Virtual Licensing Service Process

## SYSTEM REQUIREMENTS

System requirements for using the Virtual Licensing Service:

- IPedge systems running release 1.7 and later software use the virtual licensing service.
- The IPedge system with on-line virtual licenses must have access to the internet. Systems with dongle based licenses do not require internet connection. IPedge ES systems require internet connection only for the initial license load and when new licenses are added.
- The system must have a static private IP address.

## OFF LINE DONGLE BASED LICENSING

The dongle based offline licensing option in IPedge EC, EM and, EP release 1.7.4 and later eliminates the need for internet access or a static IP address by binding the license to the dongle. The dongle must be plugged into the IPedge server at all times. If the license dongle is unplugged, a notification voicemail will immediately be sent to the person in the notification list. After 24 hours, all calls, except 911, will be prohibited until the license dongle has been plugged back in.

When the IPedge system is ordered a license dongle must be ordered.

The license purchases are the same as systems using the cloud or on-line licensing system. When the licenses are purchased on Toshiba's FYI website the dongle serial number is entered. The licensing service generates a binary license file. This bin file is now bound to the license dongle. The bin file is sent in an email to the customer contact, it is also available on the FYI website.

During the IPedge installation the dongle is plugged into a USB port on the server. The presence of the dongle switches the server to off-line license mode. In the initial setup page the administrator can browse to the license bin file.

The license dongle, if used, **MUST** remain plugged into the server at all times. The systems monitors the dongle.

**Important!** If the dongle is not connected at system start-up critical functions will not start.

The system will monitor the USB License Dongle. If the dongle is removed or replaced with an invalid dongle while the server is running it will continue to function for 24 hours then, the following occurs:

- All new calls (except E911) will be prohibited.
- If ACD is running it will change to 'demonstration' mode.
- New license container files will be rejected.

While the dongle is out:

- Configuration changes are allowed.
- Station registration such as Call Forward, or Do Not Disturbed are allowed.

When the dongle is reconnected normal operation is restored within one minute.

## **IPedge ES LICENSE PROCEDURE**

The IPedge ES system uses the Virtual License Service but, does not require a constant internet connection. Off-line dongle based licensing is not available for IPedge systems. If the IP address changes it has no effect on the license.

The IPedge ES system will attempt to "Call Home" to the Virtual License Service every seven days. If it connects the service will check for new licenses and software updates. If new licenses or software updates are available notice will be shown in Enterprise Manager. If the IPedge ES server does not connect to the license service there is no change to IPedge ES system.

The IPedge ES system licensing sequence:

1. Login to Toshiba's FYI website.
2. Assign the licenses to the IPedge ES serial number.
3. The EULAs are sent.

4. When the dealer and customer accept the EULAs the License String is sent to the dealer contact email address. It is also available on the license service website.
5. Connect the IPedge ES server to the internet.
6. Login to Enterprise Manager. Select **Maintenance > Licensing > License Control**. Enter the license string.
7. The IPedge EP system will contact the licensing service. The license service then sends the license content to the IPedge ES server.
8. After new license content is received the IPedge system will re-boot.
9. When the re-boot is complete the server can be disconnected from the internet.
10. An internet connection is not required until a license change is needed.

**UPGRADE to  
VERSION 1.7.x**

IPedge systems must be running 1.7.0 or later software to use the virtual licensing service.

IPedge systems running release 1.6.x and earlier software were licensed using the older, downloaded file method. These systems must have their current licenses converted to the virtual licensing service and the software then must be upgraded to release 1.7 (or later).

**License  
Conversion**

IPedge systems running 1.6.x or earlier software must have their licenses converted to the Virtual Licensing Service. Use the license conversion process on the FYI web site. Refer to [Chapter 4—System Upgrade to Virtual Licensing](#).

**Software Upgrade**

IPedge systems running release 1.5 and earlier software must be updated to 1.6.2-359 before the update to 1.7 software. Refer to the IPedge Install manuals for upgrade instructions.

For IPedge systems running 1.6.-359 software save the system backup files to a location that is not on the IPedge server. Install the release 1.7 software on the server then, restore the backup files.

**Important!** Obtain a new license and the License Key from the FYI web site before updating to IPedge 1.7 software.

Refer to the IPedge system install manuals for detailed database backup and restore procedures.

1. Backup the IPedge system databases. Refer to the IPedge system install manuals for the backup procedures.
2. Save the backups to a location off of the IPedge server.
3. Request the IPedge R1.7 licenses using Toshiba's FYI web site.
4. Use the IPedge 1.7 recovery media (ISO DVD or USB Flash Drives) to configure the server with IPedge 1.7 software. Refer to the IPedge installation manuals for the system recovery procedure using an ISO disk or virtual server USB flash drive.

**Note:** For virtual IPedge server; delete the IPedge OVA file (delete the ACD OVA if equipped). Restore the release 1.7 OVA files with the provided recovery flash drive.

5. Apply any software updates.
6. License the IPedge server.
7. Restore the IPedge database.

**PERPETUAL LICENSE**

Perpetual licenses are purchased only once. These are the standard type license, they have no expiration date.

When a perpetual license is purchased and the system is already running on a trial license, the purchased license will replace the temporary license in the licensing service. The perpetual license does not effect the IPedge system until it is applied.

**License Upgrade**

When a dealer orders additional licenses for a system from the FYI web site those new items are moved into the dealer's inventory. The license items can

then be bound (assigned) to the customer's system. The new items will be visible in the FYI portal.

The new licenses will be picked up the next time Enterprise Manager calls home. Enterprise Manager contacts the Virtual Licensing Service (calls home) once every seven days, at each system reboot, and when an apply license command is entered in Enterprise Manager.

The new features can be retrieved manually by refreshing the license through Enterprise Manager. The refresh checks for new licenses, apply retrieves and applies the new license. A new license key is not required.

When the Maintenance license expires, Enterprise Manager displays an expiration message when the user logs in.

## TRIAL LICENSE

**Note:** If you do not intend to use a trial license for this customer do not install the free trial licenses that may have been included in the system bundle.

Trial licenses are intended as a way for end users to try features that were not part of their initial purchase. The trial license is bundled into each IPedge system package. Additional trial licenses can be purchased, These licenses expire 60 days after they are applied to an IPedge system. One additional 60-day trial license can be applied to a system.

When a perpetual license is ordered the trial license for that feature is canceled. The capacity of a feature in the trial license package is the system capacity of that feature, it is available during the trial period is shown in [Table 1](#). For example;

An IPedge system purchased without UCedge will include a UCedge trial license. When the trial license is applied that system will have the system capacity UCedge enabled. Before the trial expires, the customer purchases a limited number of UCedge licenses. When the perpetual UCedge license is applied the trial license is canceled and the purchased license capability goes into effect.

Toshiba's virtual licensing service tracks the trial license expiration date. When the expiration will occur in seven days and again at two days it will send an email to the end user and dealer contacts.

When both perpetual license and trial license appear at the same time, the perpetual license will take priority. If a perpetual feature license is present the perpetual feature is used; if perpetual feature is not present then trial feature is used. For example: the dealer purchases feature A for 30 ports and the trial license offers feature A at 200 ports and feature B 200 ports. The IPedge system will be licensed with 30 ports of feature A 30 permanently and 200 ports of feature B with an expiration date.

When a trial license has expired no action is required. The IPedge system does not need to be restarted, the FYI account will be updated automatically. If a perpetual license is added the dealer will need to login to the IPedge system to apply the new license. If a restart of the licensed service is required a message will display.

Customized trial licenses or changes to the trial features are not available.

The Toshiba FYI web site will send one licensing key to customer/dealer via email. Both perpetual and trial license are activated the same time.

Table 1 shows the Trial Licenses included with each IPedge system bundle.

**Table 1: Trial License Descriptions**

Trial License Description
<p><b>Unified Messaging</b> – Provides tight UM integration with Exchange Server 2007 or later. Unified messaging feature to synchronize between voicemail and email is included in the IPedge system without additional license. This license adds the automatic greeting change based on the Outlook calendar, the contact information passing such as Caller Name/ Email address for UM integration. Quantity for trial: 1 (EP/EC/EM)</p>
<p><b>UCedge Client</b> – System type maximum client license for UCedge including the VoIP feature for the softphone. It can be applied to Call Manager or Lync Plug in. The same user account requires the one license when multiple devices are used to login. To use the softphone, the user license is required on the server. In trial mode, Call Through and Call Back are available, but softphone is not available. Quantity for trial: 360 (EP/EC/EM)</p>
<p><b>ACD Agent</b> – One additional enhanced agent license for IPedge. Requires Toshiba ACD system on the IPedge Virtual Server. Quantity for trial: 360 (EP), 720 (EC/EM)</p>
<p><b>ACD Unifier</b> – License to add a single node license for the Unifier. Quantity for trial: 20 (EP/EC/EM)</p>
<p><b>ACD MMQ</b> – Provides users with the ability to request the call back and chat on the web page. Requires the Toshiba ACD system on the IPedge Virtual Server Quantity for trial: 1</p>
<p><b>IPedge Net</b> – One required for each IPedge Net channel. Quantity for trial: 20 (EP), 96 (EC), 440 (EM)</p>
<p><b>Note:</b> The ACD trial licenses are available only on ACD ready IPedge Virtual Servers.</p>

**SYSTEM TYPE VERIFICATION**

Each License String includes the System Type (EC/EM/EP). Enterprise Manager checks the system type before activating a license. If the licensed type does not match the license system type, activation is prohibited.

Enterprise Manager will retrieve the customer information (Company Name) when activating the license. Enterprise Manager will insert the company name into the Enterprise Manager database and display it on the Enterprise Manager home page.

**IPedge VIRTUAL LICENSING OVERVIEW**

The license key is entered in Enterprise Manager during the System Setup. When an IPedge system is setup that system's Host ID is created. The license key, Host ID, and the list of licenses are used by the Virtual Licensing Service to create the License String. The license string, sent to the IPedge system by the service, enables the features in the IPedge system.



	<p>A unique System ID is generated by FYI to identify a specific system. It is used by FYI as Software Update and Support (SUS) identification, it is not used by licensing service. No new License Key will be generated for an add-on (updated) licenses.</p>
<b>IPedge Host ID</b>	<p>The Host ID is a unique identification string that includes the system type (EP, EC or EM), the server characteristics, public IP address, and other information. The Host ID is used by the licensing service to bind the licenses to a specific IPedge server.</p>
<b>Transfer Licenses</b>	<p>When licenses have been applied (bound) to an IPedge system, those licenses can be transferred to another system. The transfer function can be used to apply the licenses to a system that has been moved to a new public IP address (new host ID). The licenses, once applied, are transferred as a set. The individual items can not be transferred.</p>
<b>Revoke License</b>	<p>Licenses chosen for a site, but not applied, can be revoked. The revoked individual license items return to the dealer's inventory.</p>
<b>System Type Verification</b>	<p>Each License String includes the System Type (EP, EC or, EM). Enterprise Manager checks the hardware type before activating the license. If the licensed type does not match the system hardware, activation is blocked.</p>
<b>SYSTEM SUPPORT and UPGRADE SERVICE</b>	<p>The Software Support and Upgrade Service (SUS) is not a license, it is a subscription service. This service provides software updates and enhancements and, technical support. SUS is available in one-year or multi-year increments.</p>
<b>SUS Expired Indication</b>	<p>When the SUS approaches expiration or has expired, Enterprise Manager provides an indication when a user logs in to Enterprise Manager.</p>

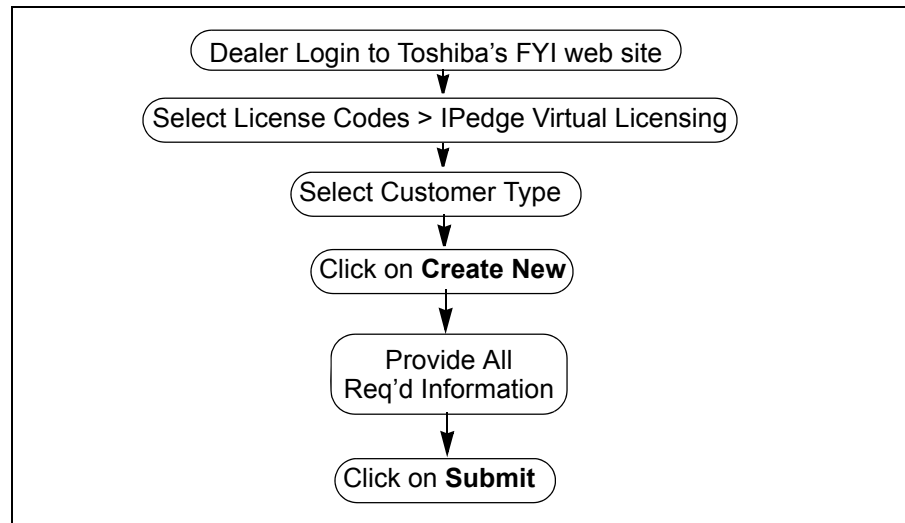


The dealer contact first setups a customer site in Toshiba's FYI License web site and assigns license items. The license items are assigned from the dealer's inventory, licenses the dealer has purchased. The dealer can purchase licenses and assign those license a Single License Order number. This order number allows the dealer to search the inventory for the items purchased for that client.

This section covers the FYI IPedge Licensing Service procedures. Refer to [Chapter 5–Enterprise Manager License Control](#) in this manual for the procedures used to apply the licenses.

## NEW CUSTOMER SITE

The dealer contact creates a customer in the FYI Virtual Licensing Service web site.



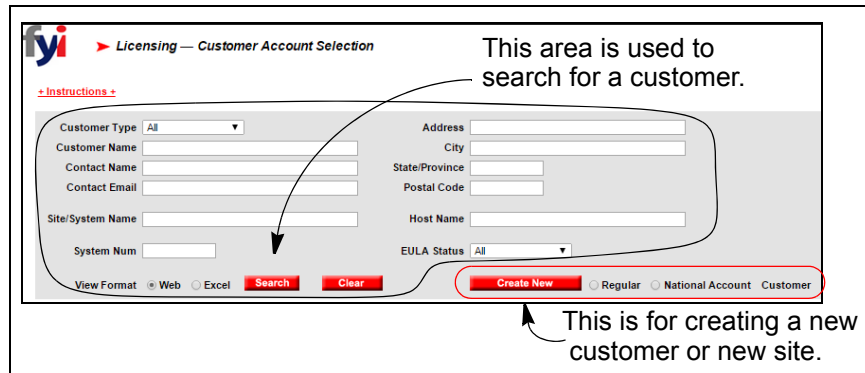
**Figure 2 – New Customer Setup**

## NEW CUSTOMER SETUP

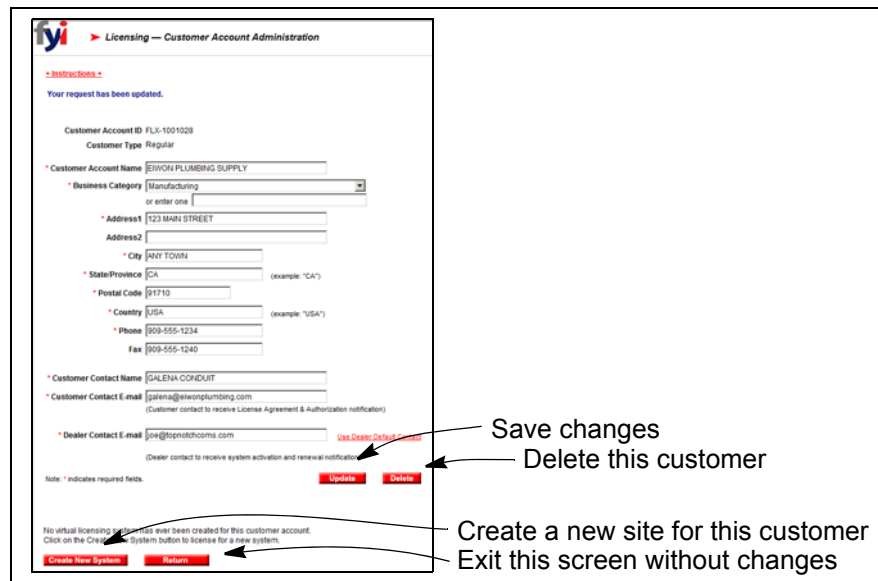
The dealer sets up a customer in the IPedge Virtual Licensing Service section of the FYI Each customer can have one of more sites.

1. Login to Toshiba's FYI web site.
2. Select **License Codes > IPedge Virtual Licensing**.

3. Select **Regular** or **National Account** Customer, next to the Create New button.



4. Click on the **Create New** button.
5. Enter the required information for the customer then click on the **Update** button.



### Add A Customer Site

Each customer can have one or more sites.

1. Login to Toshiba's FYI web site.
2. Select The Customer Name from the list.
3. Click on the **Create New System** button. This will add another site to the customer.
4. Enter the customer site information then, click on the **Submit** button.

### Create or Edit a Site

This procedure is used to create a system at a customer site or edit the information/system for a customer site.

1. Login to Toshiba's FYI web site.
2. Select The Customer Name from the list.
3. Enter or change information as needed.

- Click on the **Create New System** button to create a new site. Click on the **Update** button to save the changes.
- Enter the customer site information then, click on the **Submit** button.

**fyi** > Licensing — Customer Account Administration

[+ Instructions +](#)

Customer Account ID FLX-1001028  
Customer Type Regular

\* Customer Account Name

\* Business Category

\* Address1   
Address2

\* City

\* State/Province  (example: "CA")

\* Postal Code

\* Country  (example: "USA")

\* Phone   
Fax

\* Customer Contact Name

\* Customer Contact E-mail   
(Customer contact to receive License Agreement & Authorization notification)

\* Dealer Contact E-mail  [Use Dealer Default Contact](#)  
(Dealer contact to receive system activation and renewal notification)

Note: \* indicates required fields.  Save changes

Listed below are the virtual licensing system(s) that have been created for this customer account. Refine the list by applying the proper search criteria.  
Click on the System Name link to conduct licensing request for an existing system - OR - Click on the Create New System button to license for a new system.

Search this list of sites

Site/System Name	System Type	Host ID	Host Name	Address	City	EULA Status	Exp Date
<a href="#">EASTERN SALES OFFICE</a>	IPedge EC-Virtual		easternsales	567 CENTER AVE	OUR TOWN	Accepted	08-11-2016
<a href="#">EIVON PLUMBING SUPPLY</a>			westernplant	123 MAIN STREET	ANY TOWN		

Create a new site for this customer Exit this screen without changes

- When the new site has been created a System Number will be created and displayed. This number is used in other processes include System Upgrade.

Listed below are the virtual licensing system(s) that have been created for this customer account. Refine the list by applying the proper search criteria.  
Click on the System Name link to conduct licensing request for an existing system - OR - Click on the Create New System button to license for a new system.

Site/System Name	System Type	System #	Host ID	Host Name	Address	City	EULA Status	Exp Date
<a href="#">EASTERN SALES OFFICE</a>	IPedge EC-Virtual	84090		easternsales	567 CENTER AVE	OUR TOWN	Accepted	08-11-2016
<a href="#">EIVON PLUMBING SUPPLY</a>	IPedge EC-Virtual	84089		westernplant	123 MAIN STREET	ANY TOWN	Accepted	04-13-2020
<a href="#">EIVON PLUMBING WAREHOUSE</a>		84329			1357 DUTCH ELM ST	PLUMBIA		

System Numbers are generated by FYI

## LICENSE GENERATION

Licenses are generated using Toshiba’s FYI web site. If you will be using a Model Database refer to “[MODEL DATABASE](#)” on page 18 for the required licenses to support the model database.

**Note:** The licenses generated for an IPedge system are assigned in one of three ways.

- Online virtual licenses are assigned to the server serial number.
- Off-line dongle based licenses are assigned to the dongle number.
- IPedge ES licenses are assigned to the serial number printed on the Serial Number label attached to the server box.

- Login to IPedge Virtual License link on the FYI web site.

2. Navigate to the customer, customer site, click on the **Request New License** icon.
3. Select the license items and Software Support and Upgrade Service (SUS).

**Note:** The default view is all of the dealer’s license inventory. The list can be sorted order number. If the licenses were purchased with an License Order Number for this customer, sort inventory list by that number.

4. Accept the Dealer EULA.
5. When the dealer has completed the License Generation for a customer site, the customer will receive an email requesting the customer contact to agree to the EULA.

Customer: EIWON PLUMBING SUPPLY      System Name: EASTERN SALES OFFICE  
 Address: 567 CENTER AVE      Customer Contact: M. LUMBERG  
 OUR TOWN      mlumbrg@eiwoneast.com  
 WV, 26506  
 FYI System #: 84090      Dealer Contact: joe@topnotchcooms.com  
 System Type: IPedge EC-Virtual      Host Name: easternsales  
    Host ID: Not bound yet

**TOSHIBA AMERICA INFORMATION SYSTEMS, INC. Terms and Conditions Acceptance**  
 Thank you for choosing to be a partner with Toshiba. Please review the End User License Agreement provided below.  
 If you ACCEPT the given terms, please confirm **you have read and accepted the given terms** and click on the **I Accept** button below.

**End User License Agreement**

**Preface:**  
 For users in the following countries, please refer to "TOSHIBA AMERICA INFORMATION SYSTEMS, INC. End User License Agreement" or "TOSHIBA AMERICA INFORMATION SYSTEMS, INC. Contrat de licence de la Division des systèmes de télécommunication."

- United States of America
- Canada
- Bahamas
- Barbados

Please confirm you are M. LUMBERG by typing your name below.

I have read and accept the given terms.  
 I would like to receive notifications about my product from Toshiba.

I Accept      I Decline

6. The dealer will receive a notice that the customer has agreed the EULA, this notice includes the license key.

## LICENSE APPLICATION

### On-Line Virtual Licensing

The license application depends on the IPedge system type (EC, EM, EP, ES) and licensing type (online or dongle based off line). Dongle type is not available for IPedge ES systems.

During the System Setup the license key is entered (copy / paste) into the Enterprise Manager license key field.

The IPedge system must have access to the internet to apply the licenses. The licenses must be active in the IPedge system to program the system database.

**Note:** The public IP address is part of the host ID. If the IPedge system public IP address changes the licenses will need to be applied again.

When the IPedge system license is activated the Virtual License service sends an encrypted license string to the IPedge system. Refer to ["VIRTUAL LICENSING SERVICE CONTACT"](#) on page 2.

**Off-Line Dongle Licensing**

The license file is generated in the Virtual Licensing Service. The license file is downloaded to the administrator's computer for upload using Enterprise Manager. The IPedge system does not need access to the internet to apply the licenses. The licenses must be active in the IPedge system to program the system database.

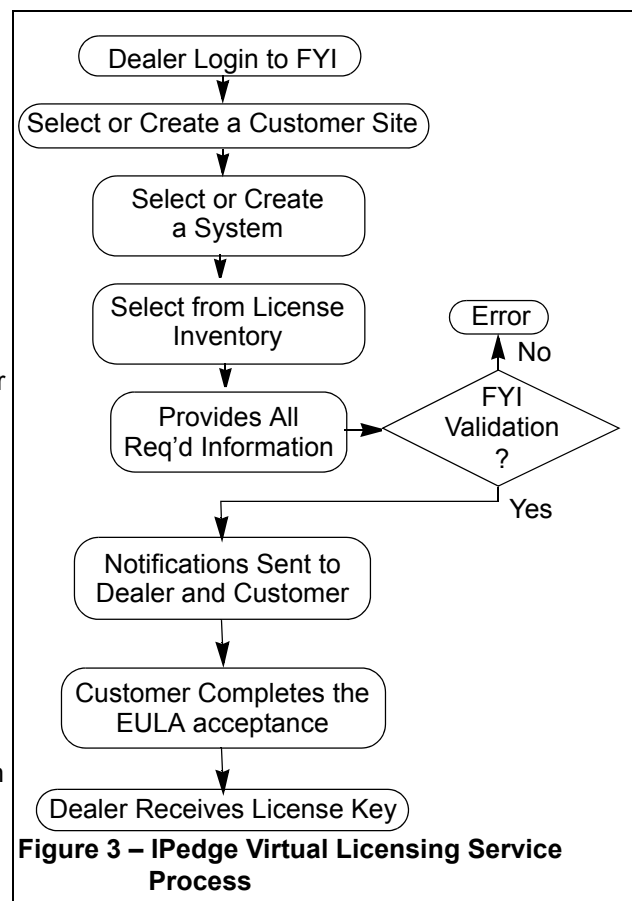
**IPedge ES Licensing**

The IPedge ES licenses are attached to the number shown on the Serial Number label on the server box. The IPedge ES system must have internet connection to download the license file. No internet connection is required except to change licenses or download software updates.

**License Upgrade**

This procedure is used to add new license items or SUS to an existing system.

1. Login to Toshiba's FYI web site.
2. Select the IPedge Virtual Licensing Service.
3. Navigate to the customer, customer site, click on the **Request Upgrade** icon.
4. Select the licenses items. Click on the **Submit** icon.
5. Accept the Dealer EULA.
6. When the dealer has completed the License Generation for a customer site, the dealer contact will receive email notice that a new license is available and can be applied.



**Note:** A new license key is not generated.

7. The dealer can login to Enterprise Manager to refresh the license. Select **Maintenance > Licensing > License Control**. Click on the **Refresh** icon. When the IPedge server has received the license update the **New license is available** note will appear in the License Control page. Click on the **Apply** icon to apply the new license.

**LICENSE TRANSFER**

Each IPedge server has a Host ID. When a license key has been applied to the IPedge server the license is bound to that host ID. The license remains bound to that host ID, until transferred. The IPedge server public WAN IP address is a part of the host ID.

When a server is moved to a new location with a new IP address or the public IP address changes it has a new host ID. When the licensed server, with a new host ID, 'calls home' the licensing service will send an 'invalid host ID' message. IPedge systems running 1.7.1 software will continue to process calls. If the license is not transferred to the new IP address the Enterprise Manager administration access will be degraded. Only the license transfer functions will be available.

The license transfer is used to transfer the license from a damaged server to a replacement server, when the server is moved to a new location, or the public IP address is changed.

The licenses, once applied, are transferred as a package. The individual items can not be transferred.

Licenses chosen for a site, but not applied, can be revoked. The revoked individual license items return to the dealer's inventory.

**Important!** When transferring licenses from a IPedge 1.6 or earlier system, from multiple systems (IPedge system and a MAS) or, a Strata CIX system all licenses may not transfer. Licenses not transferred are lost. Refer to [Chapter 4–System Upgrade to Virtual Licensing](#) for detailed procedures and additional information.

The license transfer procedure follows.

1. Login to Toshiba's FYI web site, use the IPedge Virtual License link.
2. Navigate to the customer, customer site, click on the Request Transfer icon. Click on Continue when prompted.
3. The Virtual License server will send a new license key to the dealer contact email address. The new license key is also available on the FYI web site.
4. The current system will become unlicensed when it calls home or the Refresh then Apply icons are selected in Enterprise Manager.
5. Login the Enterprise Manager on the IPedge system with the new IP address.
6. In the License Control section click on license refresh then apply license. The system status will change to unlicensed.
7. When the status has changed to Unlicensed click on apply license again.
8. Enter the new license key then click on OK. The license server will send the licenses to the IPedge system.

**Public IP Address Change**

This is the procedure used when the IPedge system public IP address is changed.



**Note:** This does not apply to IPedge ES systems or IPedge systems with a license dongle running 1.7.4 or later software.

1. When the IPedge system boots up with a new public IP address a warning message will be displayed. The message warns that the Host ID has changed.
2. Login to Toshiba's FYI web site, use the IPedge Virtual License link.
3. Navigate to the customer, customer site, click on the Request Transfer icon. Click on Continue when prompted.
4. The Virtual License server will send a new license key to the dealer contact email address. The new license key is also available on the FYI web site.
5. Login the Enterprise Manager on the IPedge system with the new IP address.
6. In the License Control section click on license refresh then apply license. The system status will change to unlicensed.
7. When the status has changed to Unlicensed click on apply license again.
8. Enter the new license key then click on OK. The license server will send the licenses to the IPedge system.

## MAINTENANCE LICENSE (SUS)

The Software Support and Upgrade Service (SUS) is not a license, it is a subscription service. This service provides software updates and enhancements and, technical support. SUS is available in one-year or multi-year increments.

Refer to [Chapter 5–Maintenance Renewal](#) for additional information and detailed instructions.

### SUS expired indication

When the SUS approaches expiration or has expired, Enterprise Manager provides an indication when a user logs in to Enterprise Manager.

When additional SUS is purchased the new expiration date will be reflected on the next Call Home cycle.

## TASKE

IPedge systems running 1.7 or later software with ACD licensed has TASKE software installed. To use the TASKE application follow the procedure below.

1. Using Toshiba's FYI web site order a TASKE license dongle, part number; H-TASKE-LICKEY.
2. Plug the dongle into the IPedge server.
3. Login to the FYI website and select **License Codes > License Generation**.
4. Select the TASKE license items (LICMAS-TASxxx).
5. Click on **Submit**.
6. Dealer EULA
7. Click on Download License File.
8. Copy the license file to the IPedge server.

**MODEL DATABASE**

Model databases reduce the installation time of the IPedge systems. The model database can be downloaded and installed using the Data restore functionality from Webmin using Enterprise Manager.

The tables show the model database programming data.

- Four digit station numbering is shown in [Table 2](#).
- Three digit station numbering is shown in [Table 3](#).

**Table 2: Four Digit Station Numbering**

Pre-configured Data	Licenses Required
<b>EC</b>	
96 IPT phones (2200 ~ 2295), PhDN (5200~ 5295)	96 IP endpoint licenses
16 SIP-VM ports (Pilot = 2500, DN=2501 ~ 2516)	16 VM Port License bundles
16 SIP Trunk channels	16 SIP Trunk Channels
IPedge Net channel	1
Voicemail boxes are not included in the pre-configured data	
<b>EM</b>	
160 IPT phones (2300 ~ 2459), PhDN (5300~ 5459)	160 IP endpoint licenses
8 SIP-VM ports (Pilot = 2500, DN=2501~2508)	8 VM Port License bundles
32 SIP Trunk channels	32 SIP Trunk channels
IPedge Net channel	1
Voicemail boxes are not included in the pre-configured data	
<b>EP</b>	
24 IP telephones (2100 ~ 2123), PhDN (5100 ~ 5123)	24 IP endpoint licenses
4 SIP-VM ports (Pilot = 2500, DN=2501~ 2504)	4 VM Port License bundles
4 SIP Trunk channels	4 SIP Trunk channels
IPedge Net channel	1
Voicemail boxes are not included in the pre-configured data	
<b>Important!</b>	The appropriate end point SIP trunk channels and IPedge Net licenses must be purchased, issued and activated on the IPedge system.

**Table 3: Three Digit Station Numbering**

Pre-configured Data	Licenses Required
<b>EC</b>	
96 IPT phones (200 ~ 295), PhDN (3300 ~ 3395)	96 IP endpoint licenses
16 SIP-VM ports (Pilot = 500, DN = 501 ~ 516)	16 VM Port License bundles
16 SIP Trunk channels	16 SIP Trunk Channels
IPedge Net channel	1
Voicemail boxes are not included in the pre-configured data	
<b>EM</b>	
160 IPT phones (200 ~ 359), PhDN (3600 ~ 3759)	160 IP endpoint licenses
8 SIP-VM ports (Pilot = 500, DN = 501 ~ 508)	8 VM Port License bundles
32 SIP Trunk channels	32 SIP Trunk channels
IPedge Net channel	1
Voicemail boxes are not included in the pre-configured data	
<b>EP</b>	
24 IP telephones (200 ~ 223), PhDN (3300 ~ 3323)	24 IP endpoint licenses
4 SIP-VM ports (Pilot = 500, DN = 501 ~ 504)	4 VM Port License bundles
4 SIP Trunk channels	4 SIP Trunk channels
IPedge Net channel	1
Voicemail boxes are not included in the pre-configured data	
<b>Important!</b> The appropriate end point SIP trunk channels and IPedge Net licenses must be purchased, issued and activated on the IPedge system.	

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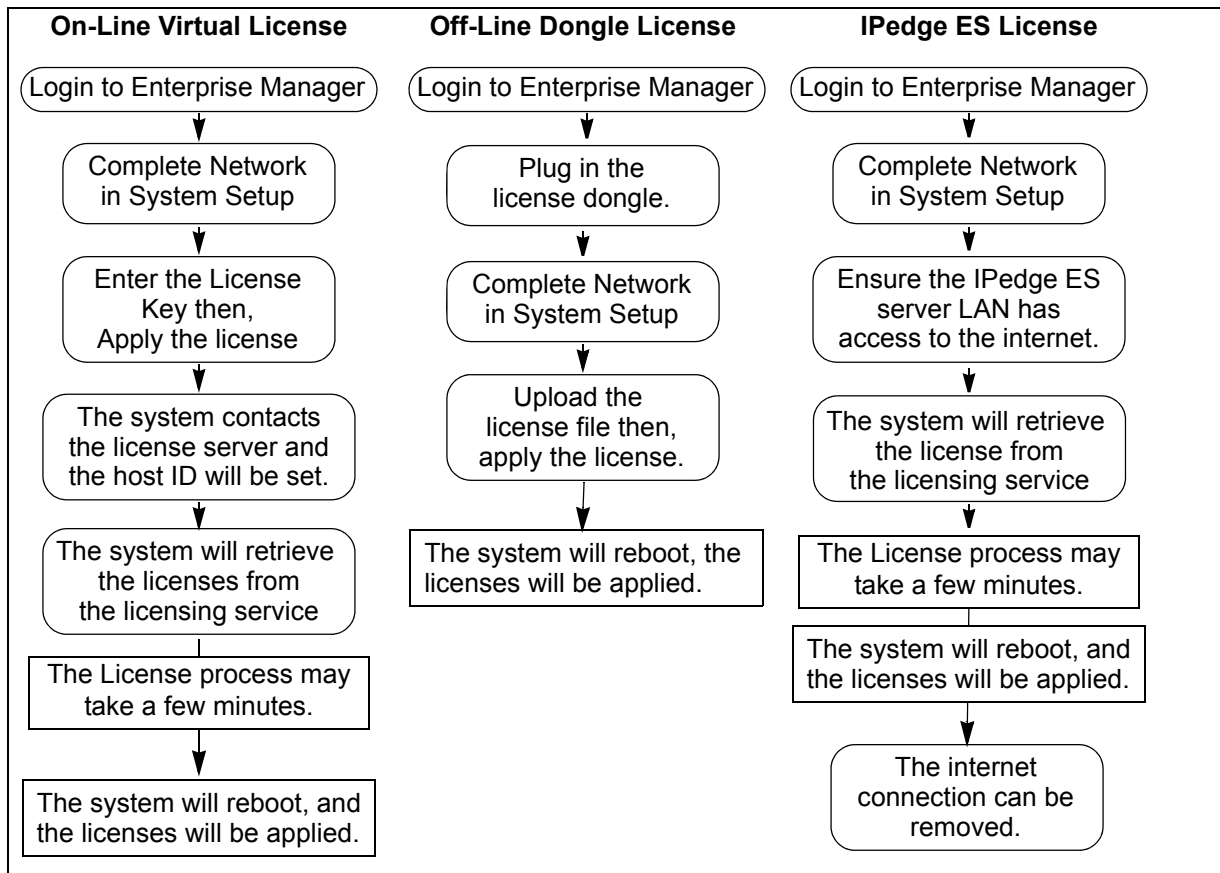
# Enterprise Manager License Control

# 3

## SYSTEM PROGRAMMING

When the system licenses are setup in the IPedge Virtual Licensing service a license key is sent to the dealer and customer contacts. The license key is also available to the dealer on the FYI web site.

The license key is entered in Enterprise Manager during the System Setup. When an IPedge system is setup that system's Host ID is created. The license key, Host ID, and the list of licenses are used by the Virtual Licensing Service to create the License String. The license string, sent to the IPedge system by the licensing service, enables the features in the IPedge system. Refer to the ["VIRTUAL LICENSE SERVICE FLOW CHART"](#) on page 3-29 for additional details.



This section covers the procedures used to apply licenses during the initial system setup, when the host ID changes, license transfers and when additional licenses are added.

### System Type Verification

Each License String includes the system type (EP/EC/EM). Enterprise Manager checks the hardware type before activating the licenses. If the

licensed type does not match the system hardware, activation shall be prohibited.

## **INITIAL SYSTEM SETUP**

The IPedge virtual server must have the following:

- The network must have access to the internet.
- The router/fire wall the IPedge server connects through to the internet requires access to the IPedge Virtual Licensing service. Allow access to:
  - The public domain; toshiba.flexnetoperations.com
  - The public domain: fyi.tsd.toshiba.com
  - The public domain: opendns.com
  - HTTPS
  - Port 53
  - Port; 443
- The end user customer representative must have accepted the EULA on the 'click and agree' web-page.
- The license key must be available. This key is sent by email to the customer contact when the customer contact has accepted the EULA. The license key is also available on Toshiba's FYI web site.
- The IPedge server must have a connection to a network.
- The IPedge server network (the router through which the ipedge system connects to the internet) must have a static public IP address.

### **Initial Setup At The Customer Site**

The IPedge server must have a connection to a network (connection to a network switch). The network must have access to the internet through a router / firewall that can translate the public IP address to the private IP address of the IPedge system. **Refer to the IPedge Virtual Server Install manual.**

1. If this is a Dell® server/computer complete the Dell hardware ownership transfer.
2. Connect a network cable to the IPedge server NIC. Power-up the server.

- Use vSphere client to apply the customer's VMware® license.

Any change to parameters in this area will cause a system reboot.

The NTP is setup here.

**TOSHIBA** System Initial Setup / Network Configuration

Note: Changes to this control group requires a system restart.

**Network Configuration**

Server Name:

Hostname:

IP Address:

Network Mask:

Gateway:

**IPMI/BMC IP Address**

IP Address:

**DNS Server Configuration**

DNS Server list:

**System Time and Date**

System Time Sync Period:  System Time Sync Server:

System Date (Year/Month/Date):  Time (please enter in 24 hour format):

System Time Zone:

- Login to Enterprise Manager, it will open to the System Setup page, set the IPedge IP address. This is the private IP address for the IPedge system. The IPedge system will reboot.
- IPedge** Enterprise Manager default address: 192.168.254.250. The subnet mask is 255.255.255.0. To login to Enterprise Manager enter **http://192.168.254.250:8080/oamp** into the browser address line. The User ID is **Administrator**, the password is **password**. The password is case sensitive. The administrator PC must be in the same subnet as the IPedge server.
- Login to Enterprise Manager, in System Setup enter the license code. Click on **Next**.
- Verify the information is correct then, click on **OK**. If the information is not correct click on Cancel.

Please confirm

Please review the information below carefully. Click the OK button to apply the configuration now.

**System Setup / Network Configuration**

<b>Server Name:</b> IPedge	<b>DNS Server list:</b> 119.119.119.14	<b>System Time Zone:</b> America/Los_Angeles
<b>Hostname:</b> IPedge: IPedge-17016	119.119.119.140	<b>System Date:</b> 2015/08/28
ACD: <input type="text"/>		<b>SystemTime:</b> 10:25
<b>IP Address:</b> IPedge: 119.119.119.45		<b>System Time Sync Period:</b> Daily
ACD: <input type="text"/>		<b>System Time Sync Server:</b> north-america.pool.ntp.org
<b>Network Mask:</b> 255.255.255.0		
<b>Gateway:</b> 159.119.119.1		

**System Setup / Enterprise Region and Licensing**

**Enterprise Name:** Default Enterprise

**Street Address:** 123 Enterprise Ctr

**City, State, Zip:** Enterprise City, State

**Region:** USA

**IPedge License Key:** AES9-AES9-AES9-AES9

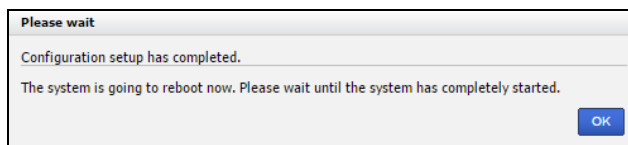
**Note:** A system **restart** is required for the configuration changes to be effective. Configuration can be resumed after the system is restarted.

IPedge Virtual Licensing Service Feb. 2017

**TOSHIBA**

23

- The IPedge system will contact the virtual licensing server. When the license and server information exchange and setup is completed the system will display this prompt. Click on **OK**. The system will reboot.



- When the system has finished the reboot and start up, login to Enterprise Manager. The system will open in the System Setup screen. Apply a model database or skip to system database configuration.

## INITIAL LICENSE

When you can login to Enterprise Manager the license can be applied.

### On-Line Virtual License

- Ensure that the IPedge system has internet access.
- Enter the License String into the License Information field.
- Click on **Next** then **OK**.
- The system will download the license and reboot.

### Off-Line Dongle License

- Ensure that the license dongle is plugged into the IPedge server.
- Enter the License File into the License Information field.
- Click on **Next** then **OK**.
- The system will download the license and reboot.

### IPedge ES License

- Ensure that the IPedge system has internet access.
- Enter the License String into the License Information field.
- Click on **Next** then **OK**.
- The system will download the license and reboot.
- When the IPedge ES system reboot is complete the internet connection can be removed.

## LICENSE CONTROL

The Enterprise Manager License Control page is used to View, Refresh, and Apply license.

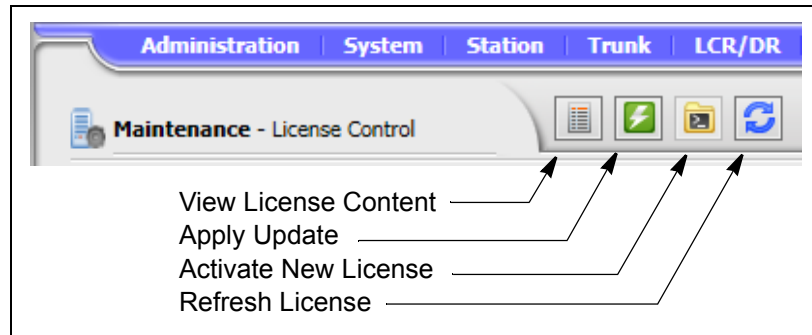
### Button Functions

The button panel has following function buttons:

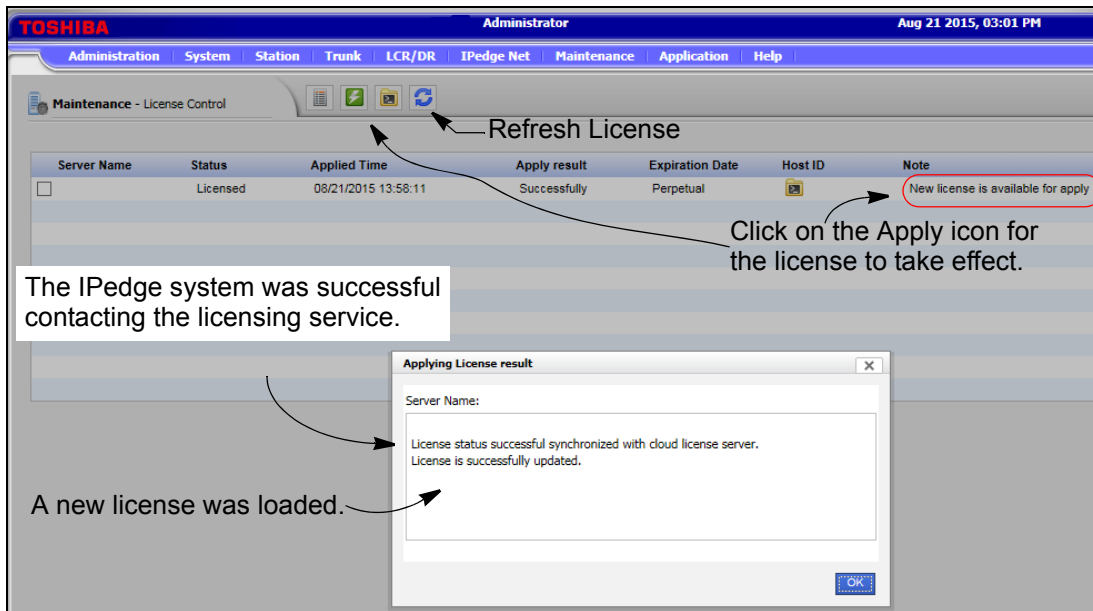
- View License Content – Select a server and click the View License button; the detailed license features shall be displayed grouped by application.
- Activate New License – Enter the License Key and apply the license. Used during initial system setup.
- Apply Update – To apply updated license features. This button becomes active when an updated feature is detected from the Licensing Service. If a component requires restart, a warning message shall be displayed.



- Refresh License – This button initiates contact with the Licensing Service. It is used to manually check for new licenses. A refresh occurs during the periodic call home. This will reset the Call Home counter.



**Display / Apply License** To display new licenses login to Enterprise Manager, select **Maintenance > Licensing > License Control**. Click on the **Refresh** icon/



## OFF-LINE LICENSING

Licenses are purchased through the Toshiba FYI web site. Use the following procedure to update or add new licenses. The license dongle serial number is entered during the license generation process on the FYI website.

**Note:** Off-line, dongle based licensing is not available on Toshiba branded IPedge or IPedge ES servers.

## Download License File

After the licenses have been purchased a license file will be sent to the contact email address. Download the license file to the Administration PC. The file can be saved to any file storage unit on a network that the administration PC and the IPedge server can access. Use the following procedure to apply the license file to the IPedge server.

**Important!** Ensure that the Region code is set to your region before applying licenses.

### **Upload and Apply License**

1. Login to the Enterprise Manager on the Primary IPedge server.
2. Select **Maintenance > Licensing > License Control**.
3. Select the server to be licensed.
4. Click on the **Upload License** file icon.
5. Enter the location and name of the license file or click on the Browse button to locate the license file.
6. Click on **OK**.

The license file name, server MAC address and the server name will be displayed. Verify that the MAC address is the correct address for this server. Double click on this line for a detailed list of the licenses.

7. Click to check-mark the uploaded file then, click on the **Apply** icon.
8. After the license is applied, the license result should show "Successful".
9. Then check "**Yes, I want to reboot the system now**" and click on **OK**. Reboot can take several minutes.

### **IPedge ES LICENSING**

A temporary internet connection is required for:

- Initial licensing
- License upgrades
- Software upgrades

**Note:** The license is tied to the MAC address of the IPedge ES server. If the public IP address changes or the system cannot 'call home' nothing changes. The system will continue to run.

1. Login to the Enterprise Manager on the Primary IPedge server.
2. Select **Maintenance > Licensing > License Control**.
3. Select the server to be licensed.
4. Click on the **Refresh License** file icon.
- 5.

### **Move System to Customer Site after Initial Setup**

In some cases it is expedient to perform the initial system setup and database configuration at one location (dealer's office) then move the IPedge server to another location (customer's premises). This procedure is also used when the public IP address of the system is changed.

1. Perform the procedure. After the database configuration is complete shut down the IPedge system.
2. Login to the Licensing Service. Browse to End Customer account, then End Customer site/system.

3. Click on **Request Transfer** button, then click on **Continue** in the pop-up. The licensing service will send an email with the new license key to the dealer contact.

4. Move the IPedge server to the new location (new public IP address). Boot up IPedge server. The server will display a host ID changed message. IPedge releases 1.7.0 and earlier software will become unlicensed.

**Note:** IPedge ES and dongle base licenses do not become unlicensed when the IP address changes.

5. Login to Enterprise Manager, In the System Setup page enter the new IP address. The system will reboot.

6. Login to Enterprise Manager, in System Setup enter the license code from step 3. Click on **Next**.

7. Verify the information is correct then, click on **OK**. If the information is not correct click on Cancel.

8. The IPedge system will contact the virtual licensing server. When the license and server information exchange and setup is completed the system will display this prompt. Click on **OK**. The system will reboot.

**Note:** The system will reboot even if you do not click on the OK button.

### **Replace a Damaged IPedge Server**

In the event that an IPedge Server is damaged and cannot be repaired a new server can be installed.

1. Login to the Licensing Service. Browse to End Customer account, then End Customer site/system.
2. Click on **Request Transfer** button, then click on **Continue** in the pop-up. The licensing service will send an email with the new license key to the dealer contact.
3. Use the procedure.

### **Purchase Additional License**

When an additional perpetual license is purchased no activation string is generated and no other action is required on the licensing service web site.

The new features will be picked up the next time Enterprise Manager calls home. Enterprise Manager contacts the Virtual Licensing Service, calls home, once every seven days, at each system reboot, and when an apply license command is entered in Enterprise Manager.

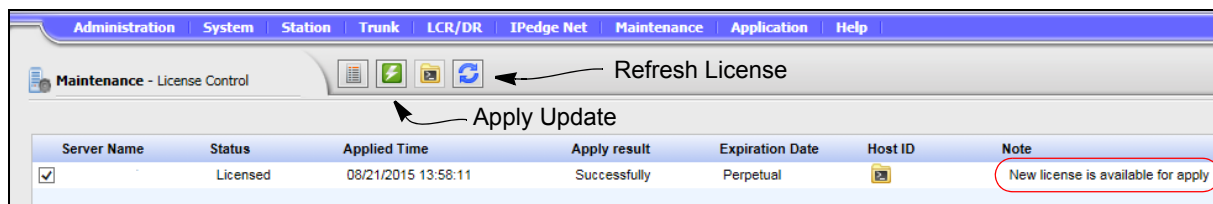
The new features can be retrieved manually by refreshing the license through Enterprise Manager.

No Licensing String is required when applying an update.

**Note:** If the registration request exceeds the license quantity, the registration will be rejected.

1. Login to Enterprise Manager.

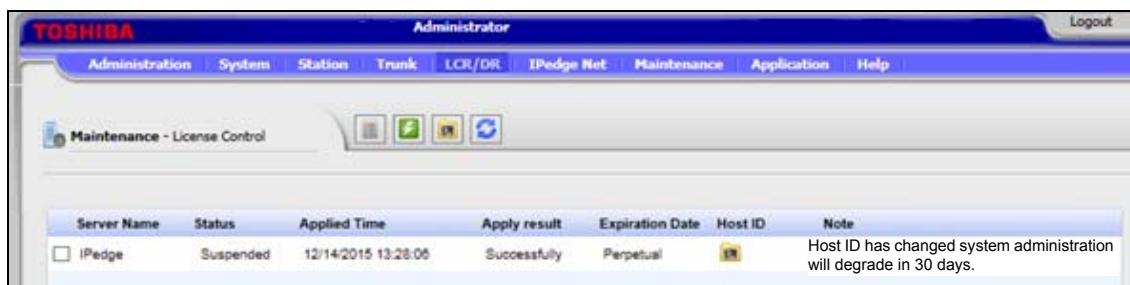
- Open the License Control page. If there is no notice of the new license click on the **Refresh** icon.



- When there is notice of a new license available click on the **Apply Update** icon.
- If an application restart is necessary a dialog box will appear.

## ADMINISTRATION NOTIFICATION SETTINGS

When an IPedge system running 1.7.1 or later software with a changed WAN IP address contacts the licensing service the IPedge system will continue to run. Even after a system reboot, the call processing will continue.



The IPedge system running release 1.7.1 software can send an email and text message notification when the public WAN IP Address changes. A list of email addresses and phone numbers for text messages can be configured to receive a notification if the IPedge system detects the public WAN IP address change. In Enterprise Manager select **Administration > Notification Setting**.

The Enterprise Manager login page and the License pages will display a changed Host ID message. The administrator will have 30 days to transfer the licenses to the new IP address. If a license transferred to the new Host ID within 30 days the Enterprise Manager access will be degraded. The degraded access will allow only license transfer.

## MULTI-NODE SYSTEMS

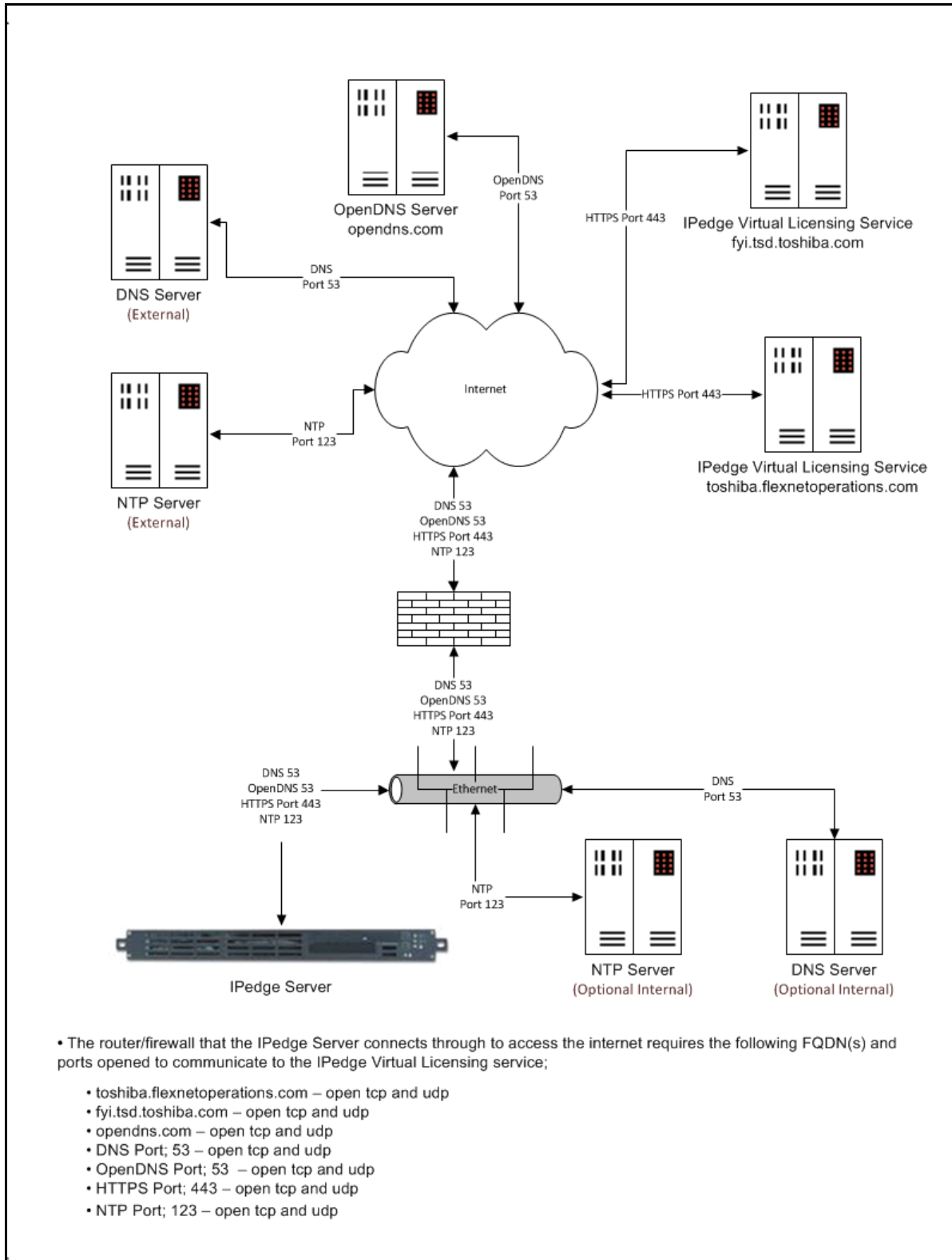
Licensing is managed from the Primary node server. The IPedge server in each node will 'call home' to the licensing service on its own seven day cycle.

Setup the IPedge server for each node as a stand-alone server.

Attach the nodes to the primary server. When the node have been attached in a multiple node system all of the Enterprise Manager operations, including licensing is done through the primary node.

**VIRTUAL LICENSE  
SERVICE FLOW  
CHART**

The diagram shown below illustrates the interaction of the IPedge virtual server and the Virtual License Service.





# System Upgrade to Virtual Licensing **4**

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## **UPGRADE TO VIRTUAL LICENSING**

IPedge systems running on IPedge 1.7 or later software use the Virtual Licensing Service on Toshiba's FYI web site.

Most of the licenses that have been applied to earlier systems can be transferred to IPedge version 1.7 or later systems. Not all licenses can transfer, contact your Customer Service representative, Toshiba Sales Engineer or, the Toshiba Sales Application Desk for details.

In order to upgrade the IPedge system Software Support and Upgrade (SUS) must be current. Any other licensed applications (i.e.; TASKE) must also be current. Contact Toshiba's customer support to check if you are in doubt.

**Important!** For systems with TASKE or Meeting installed; contact Toshiba's TSD Customer Service before starting the licensing service upgrade process.

### **Preparation**

Before starting the upgrade process ensure that you have the following information.

- System Serial Number or
- IPedge License Dongle serial number

## **MAINTENANCE RENEWAL**

The Software Support and Upgrade Service (SUS) is not a license, it is a subscription service. This service provides software updates and enhancements and, technical support. SUS is available in one-year or multi-year increments. Systems that will be upgraded must have a minimum of 30 days remaining.

Refer to [Chapter 5–Maintenance Renewal](#) in this manual.

**Important!** The upgrade from IPedge release 1.6 software to 1.7 involves a change of the operating system. This requires re-imaging the server.

The system databases (IPedge, messaging, ACD) must be backed up. The IPedge 1.7 software installed, the licensing applied then restoring the databases.

## **SYSTEM UPGRADE**

IPedge systems running 1.7.0 or earlier software can be upgraded to 1.7.1 software. Before starting an upgrade insure that the Software Support and Upgrade Service (SUS) is current.

**Software Version 1.7.0 Systems**

IPedge Servers running IPedge 1.7.0 software can be upgraded using the on-line update process. The upgrade software file, TGZ 1.7.1.190 is available on Toshiba's FYI website for local update. Refer to the IPedge Install manual.

1. If it is necessary to re-image an 1.7.0 IPedge branded server to IPedge 1.7.1 software contact Toshiba's Technical Support department for the detailed procedure.
2. When an IPedge virtual server is re-imaged refer to the IPedge Virtual Licensing Service User Guide for license transfer instructions.

**Software Version 1.6 and Earlier Systems**

IPedge 1.6 databases are not compatible with R1.7 systems. After an IPedge server is re-imaged as an R1.7 server the database restoration process will convert the 1.6 database to 1.7 configuration.

IPedge systems running 1.6.2-359 software can be upgraded to 1.7 software. Systems running 1.5 and earlier software must first upgrade to 1.6.2-359 software. When the system has been upgraded to 1.6.2-359 software the database must be backed up.

The backup files must be moved to a location not on the IPedge server.

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**CAUTION! The IPedge system must be running 1.6.2-359 software before performing the database backup in preparation for the 1.7 software upgrade.**

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**Database Conversion Service**

Toshiba's Technical Support center offers a database upgrade service (part number I-DB-CONVERSION). Contact Customer Service for turn around times.

**Re-Image to R1.7**

To upgrade an IPedge server from R1.6.2 to R1.7 the system must be re-imaged. For IPedge branded servers this requires the use of an IPedge 1.7 recovery DVD. For IPedge branded EP servers an external USB DVD drive will be required.

Refer to the IPedge Install manuals for the update processes.

**Requirements**

**Important!** Systems that will be upgraded must have a minimum of 30 days remaining. refer to [Chapter 5–Maintenance Renewal](#).

**Important!** Licenses for other services (i.e.; TASKE) must all be up to date.

**Important!** For systems with TASKE installed; contact Toshiba's TSD Customer Service before starting the licensing service upgrade process.

- License parts applicable on both the source and target systems will be transferred automatically.
- License parts containing features which go over the maximum allowed value will need to have their corresponding quantities adjusted or forfeited.



- A billing order will be created as the result of a System Upgrade request.
- A new license will not be generated until the billing order is booked and has been processed through the Toshiba FYI system.
- When multiple source systems are to be upgraded to a new target system, only one maintenance date can be inherited. For example: For a system upgrade from an IPedge EC system and a MAS, the IPedge EC maintenance date will be used.

**DATABASE UPGRADE**

The process to upgrade the system database to IPedge 1.7 depends of the original system type (MAS or IPedge) and the software version.

**IPedge Systems**

IPedge systems running on R1.6.2-359 or later software can backup the database. The database restore to the IPedge 1.7 system includes a conversion to R1.7 format.

IPedge systems running on earlier software must either upgrade to R1.6.2-359 or use the database conversion service offered by Toshiba's Technical Support. Contact technical Support for price and lead time.

**MAS**

The ACD and TASKE applications running on a Toshiba Media Application Server (MAS) have databases compatible with the R1.7 system. Systems running TASKE will require a new TASKE license dongle. Contact support for detailed information about your configuration.

**Meeting**

The Meeting application is not supported in IPedge Release 1.7.0 software. If the system to be upgraded includes Meeting contact your Toshiba Sales Engineer or the Toshiba Sales Application Desk before starting the upgrade process.

**TRANSFER LICENSES to ANOTHER PLATFORM**

This is the process to transfer licenses from one platform to another, for example: from a MAS to an IPedge server. Transfer an IPedge branded server to an IPedge virtual server does not require a quote. However TASKE licenses are handled manually by Toshiba's Customer Service.

**Important!** SUS for the system to be transferred must have a minimum of 30 days remaining when the request for quote is sent.

1. The dealer sends an email requesting a quote for the transfer to their Toshiba Sales Engineer or the Toshiba Sales Application Desk (TAIS-TSDSALESAPP@Toshiba.com). The email must include:
  - Dealer contact information
  - Customer site information. For transfer to an IPedge Virtual Server the dealer must setup the customer and the customer site information in Toshiba's Virtual Licensing Service on the FYI web site. Refer to ["NEW CUSTOMER SETUP" on page 2-7](#).
  - The original equipment type and serial number. If the original server is a virtual server include the system number from the Virtual Licensing Service web site.
  - The platform type the licenses will be transferred to.

2. The Toshiba Sales Engineer or the Toshiba Sales Application Desk will provide a transfer quote to the dealer. The quote will include:
    - Transfer fees
    - Scrap fees (if applicable)
- Note:** The quote is valid for 30 days from the date the request for quote was sent. The date the quote will expire will be shown.
3. To accept the quote the dealer will send an email to Customer Service and the Sales Engineer or Sales Application Desk that sent the quote with the following:
    - A copy of the Purchase Order (P.O.) for the fees listed in [Step 2](#) plus any other required fees and requested products.
    - The original system serial number or system number. Refer to [Step 1](#).
  4. Toshiba's Customer Service will place an order for the new licenses and generate the licenses to the new system. If required, a Return Authorization for original equipment to be returned will be sent.

**Important!** This transfer process takes a minimum of two business days after the P.O. is received by Toshiba's customer service.

5. When the license order has been processed an email notice will be sent to the dealer contact. The email will include; license transfer information and Return Authorization for original system materials as required,

### **Upgrade an Existing Machine**

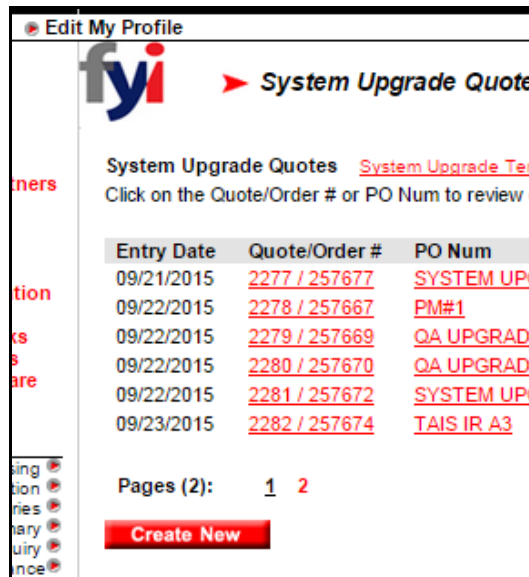
This is the customer site setup process needed to transfer licenses when upgrading an existing machine (IPedge branded server) or transferring existing licenses to a new machine (Strata MAS to IPedge virtual server).

1. Login to Toshiba's FYI web site.
2. Select **License Codes > IPedge Virtual Licensing**. Create the customer and site in the IPedge Virtual Licensing Service.

**Note:** Do not add licenses, the licenses will be transferred in a later step.

3. Select **License Codes > System Upgrade**. Read the License Transfers Among Systems information and rules then, click on **Continue**.

4. Click on the **Create New** button.



5. Enter the information in the required fields.
  - a. Target Processor is the processor to be upgraded. Select the processor from the pull-down list.
  - b. Select the processor disposition.

**Note:** For IPedge Virtual Servers with a license dongle select Scrap. The server will be kept. Only the dongle will be returned.

**Note:** For Scrap or Exchange dispositions the licensing service will generate an RMA number. There is a fee to cover the e-waste expenses.

- c. Enter the System # created when the customer site was created. Refer to “Create or Edit a Site” on page 8.

- 6. Click on **Continue**.
- 7. Complete the System Update Quote then, click on **Continue**.

Source Processor	Source Serial # / System #	Processor Disposition
IPedge EC - I-EC-1A	2862K9C28D	Retain (Keep)
Select Processor	use system # for IPedge Virtual system	Select Disposition
Select Processor	use system # for IPedge Virtual system	Select Disposition
Select Processor	use system # for IPedge Virtual system	Select Disposition

- The next screen, the System Update Quote, shows the system from which the licenses will be transferred the new system that will receive the licenses.

**fyi** System Upgrade Quote  
 Start > Source Systems > Licenses > Review > Final

Quote ID: 2286 Target System: IPedge EC-Virtual - IPEDGE-EC-FX-VM Target System #: 84089

Review and adjust the licenses of each source system from which you want to initiate the transfer. Please note that any licenses not transferred to the target system will be excluded and will not be credited.

To view the features of a license part, simply place your mouse cursor on top of the part number. You can also click on the Source/Target serial num link below to view its complete listing of license parts/features mapping.  
[+ Detail Page Instructions +](#)

License Part	Qty Avail	Qty to Transfer	Qty Currently on System	TTL Qty to Transfer	Final Qty on Target	Qty Excluded
CM-STD1	200	200	0	+ 200 = 200	200	
I-CM-1	200	200	0	+ 200 = 200	200	
I-CM-V1	200	200	0	+ 200 = 200	200	
I-CP-ATT	2	2	0	+ 2 = 2	2	
I-CP-CSTA	5	5	0	+ 5 = 5	5	
I-CP-IPENET	48	48	0	+ 48 = 48	48	
I-CP-TRUNK	36	36	0	+ 36 = 36	36	
I-CP-USR	20	20	0	+ 20 = 20	20	
I-CP-USR-EC	100	100	0	+ 100 = 100	100	
I-MSG-ADV	4976	4976	0	+ 4976 = 4976	4976	
I-MSG-CH	26	26	0	+ 26 = 26	26	
I-MSG-EXC	1	1	0	+ 1 = 1	1	
I-MSG-IVR	1	1	0	+ 1 = 1	1	
I-SYS-EC-VS	1	1	0	+ 1 = 1	1	
<b>Non-Transferable</b>						
I-MT-A	24	0	0	+ 0 = 0	0	24
I-MT-RCD	4	0	0	+ 0 = 0	0	4
I-MT-W	24	0	0	+ 0 = 0	0	24

License Parts indicated in "Qty Excluded" WILL NOT be transferred to the target system and will be forfeited.

**Update** **Back** **Continue** **Cancel**

**Note:** Any licenses in the Excluded column will not transfer and will be lost.

**Note:** If you do not wish to forfeit these licenses DO NOT use the this License Transfer utility. Contact Toshiba Customer Support.

- To continue the license transfer click on **Continue**.

- Read and agree to the terms and conditions then, click to check-mark the I Agree ... box. Click on the **Finalize** icon.

This process will not complete until all of the billing has been processed.

**Important!** If equipment such as a processor or license dongle must be returned an RMA will be issued. Return the listed equipment to avoid being charged.

11. The upgrade order will be entered for approval.

**fyi** > Licensing — License System Administration

Customer: EIWON PLUMBING SUPPLY [change](#) System Name: [EIWON PLUMBING SUPPLY](#)

Address: 123 MAIN STREET ANY TOWN CA, 91710 Customer Contact: GALENA CONDUIT galena@eiwonplumbing.com

FYI System #: 84089 Dealer Contact: joe@topnotchcoms.com

System Type: IPedge EC-Virtual Host Name: westernplant

Origination: System Upgrade Host ID: Not bound yet

Below is the summary of the OCT 05, 2015 11:58 pending system upgrade generation request for this system.  
**\*\*\* System Upgrade Order is still pending. Please come back in the next hour and check. \*\*\***

Required Software Version: DEFAULT

12. When the order has been approved an email will be sent to the customer contact with a link to the 'click and agree' page.

**fyi** > Licensing — License System Administration

Customer: EIWON PLUMBING SUPPLY [change](#) System Name: [EIWON PLUMBING SUPPLY](#)

Address: 123 MAIN STREET ANY TOWN CA, 91710 Customer Contact: GALENA CONDUIT galena@eiwonplumbing.com

FYI System #: 84089 Dealer Contact: joe@topnotchcoms.com

System Type: IPedge EC-Virtual Host Name: westernplant

Origination: System Upgrade Host ID: Not bound yet

Below is the summary of the OCT 05, 2015 11:58 system upgrade generation request for this system.

Required Software Version: DEFAULT

Requestor: Joe Dealer (joe.dealer)

Dealer: Topnotchcoms

EULA Acceptance: NOT YET ACCEPTED by GALENA CONDUIT at [galena@eiwonplumbing.com](mailto:galena@eiwonplumbing.com)

To resend notification, enter email addresses below and click on Resend Notification.

Email Addresses:

**Resend Notification**

Customer: EIWON PLUMBING SUPPLY System Name: EIWON PLUMBING SUPPLY

Address: 123 MAIN STREET ANY TOWN CA, 91710 Customer Contact: GALENA CONDUIT galena@eiwonplumbing.com

FYI System #: 84089 Dealer Contact: joe@topnotchcoms.com

System Type: IPedge EC-Virtual Host Name: westernplant

Origination: System Upgrade Host ID: Not bound yet

**Terms & Conditions Accepted by GALENA CONDUIT on OCT 05, 2015.**

Click and view [Terms & Conditions](#) accepted by expanding the Toshiba End User License Agreement section in the new window.

Thank you for Accepting Toshiba's Terms of Use.  
The installation of your system will now continue.

If you have any question or concern, please feel free to contact your Certified Toshiba Dealer, TOSHIBA TELECOM DIVISION.

13. When the order has been accepted the license key will be sent. The key is also available on the FYI, License Codes web site.

**fyi** > Licensing — License System Administration

Customer: **EIWON PLUMBING SUPPLY** [change](#) System Name: **EIWON PLUMBING SUPPLY**

Address: 123 MAIN STREET  
ANY TOWN  
CA, 91710 Customer Contact: GALENA CONDUIT  
galena@eiwonplumbing.com

FYI System #: 84089 Dealer Contact: joe@topnotchcoms.com

System Type: IPedge EC-Virtual Host Name: westernplant

Origination: System Upgrade Host ID: Not bound yet

Below is the summary of the  system upgrade generation request for this system.

**\*\*\* This system originates from a source system which was retained during the System Upgrade request. \*\*\***

**You must activate the License Key on the retained source system shown below to avoid license back-billing.**

System Type	Processor Part Num	Serial Num	MAC Address
IPedge EC	I-EC-1A	0992K9C99D	990C29A5899D

Required Software Version: DEFAULT

Requestor: Joe Dealer

Dealer: Topnotchcoms

EULA Acceptance: ACCEPTED by GALENA CONDUIT at galena@eiwonplumbing.com on 10/05/2015 01:35pm

License Key:

Copy (ctrl-c) activation code above and paste (ctrl-v) it into IPedge software.

Notification with License Key above has already been sent to the dealer contact email at [joe@topnotchcoms.com](mailto:joe@topnotchcoms.com).  
To resend notification, enter email addresses below and click on Resend Notification.

Email Addresses:

### System Upgrade Inquiry

1. Login to Toshiba's FYI web site.
2. Select **License Codes > System Upgrade**, click on **Continue**.

3. Select the end user you wish to check.

**fyi** > System Upgrade Inquiry

Quote ID: 2263    Target System: IPedge EC-Virtual - IPEDGE-EC-FX-VM    Target System #: 84205

**Order & Contact Info** **Printer Version**

License Transfer Order: [2576257](#)  
 Order Creation Time: 09-04-2015 11:54am

License code of the target system has been generated and it will be ready for download when the License Transfer Order has been processed and approved. Please go to License Codes > Inquiries to inquire on it.

Ship-To:  
 PO:  
 End User Description:  
 Contact Name:  
 Contact E-mail:  
 Contact Phone:  
 Contact Fax:

The RMA number was generated automatically as needed.

**Source Systems Summary**

IPedge EC-Dongle - H-SYS-LIC-EC ( 1789115823 ) ..... E-Waste (Scrap)    RA # [7249724](#)

RA of the above source system(s) have been created for you.  
 Click on the RA # link(s) to view the RA details and instructions.

<u>License Transfer Fee</u>	Qty	Ext Price
<a href="#">I-SYS-EC-VS</a>	1	\$99.00
<b>Total License Transfer Fee:</b>		<b>\$99.00</b>

<u>Processor Disposition Fee</u>	Qty	Ext Price
IPedge EC-Dongle - H-SYS-LIC-EC (1789115823) E-Waste (Scrap) fee	1	\$99.00
<b>Total Processor Disposition Fee:</b>		<b>\$99.00</b>
<b>Total Amount:</b>		<b>\$198.00</b>

**Return**

4. Click on **Return**.

**Verify the SUS Renewal**

To verify the billing order for the maintenance request.

1. Login to Toshiba's FYI web site.
2. Select **License Codes > IPedge Virtual Licensing**.
3. Look up the customer then, the system you want to update.
4. On the license summary page, verify that you see the Maintenance Renewal pending message and license generation request has not been invoked yet.



**TRANSFER LICENSES  
to ANOTHER  
PLATFORM**

The process to transfer licenses from one platform to another. For example: From a MAS to an IPedge server or, from an IPedge branded server to an IPedge virtual server.

**Important!** SUS for the system to be transferred must have a minimum of 30 days remaining when the request for quote is sent.

1. The dealer sends an email requesting a quote for the transfer to their Toshiba Sales Engineer or the Toshiba Sales Application Desk (TAIS-TSDSALESAPP@Toshiba.com). The email must include:
  - Dealer contact information
  - Customer site information. For transfer to an IPedge Virtual Server the dealer must setup the customer and the customer site information in Toshiba's Virtual Licensing Service on the FYI web site. Refer to ["NEW CUSTOMER SETUP" on page 2-7](#).
  - The original equipment type and serial number. If the original server is a virtual server include the system number from the Virtual Licensing Service web site.
  - The platform type the licenses will be transferred to.
2. The Toshiba Sales Engineer or the Toshiba Sales Application Desk will provide a transfer quote to the dealer. The quote will include:
  - Transfer fees
  - Scrap fees (if applicable)

**Note:** The quote is valid for 30 days from the date the request for quote was sent. The date the quote will expire will be shown.

3. To accept the quote the dealer will send an email with the following:
  - A copy of the Purchase Order (P.O.) for the fees listed in [Step 2](#) plus any other required fees and requested products.
  - The original system serial number or system number. Refer to [Step 1](#).
4. Toshiba's Customer Service will place an order for the new licenses and generate the licenses to the new system. If required, a Return Authorization for original equipment to be returned will be sent.

**Important!** This transfer process takes a minimum of two business days after the P.O. is received by Toshiba's customer service.

5. When the license order has been processed an email notice will be sent to the dealer contact. The email will include; license transfer information and Return Authorization for original system materials as required,

### Change from On-line Virtual License to Off-line Dongle License

To change existing IPedge systems to Dongle licensing the server must be upgraded to IPedge release 1.7.4 software. The IPedge software release 1.7.4 dongles are blue in color. License transfer from a Toshiba branded server to a virtual server using a license dongle will not be available until March 1, 2017.

This procedure is for installed IPedge systems with a virtual license. For new systems that have not been licensed refer to the IPedge Virtual Server install manual.

**Important!** Order the license dongle **before starting this process**. You must have the license dongle to complete the license upgrade procedure.

**Important!** The IPedge server must have internet access for this procedure.

1. Login to Toshiba's FYI web site
2. Select **License Codes > IPedge Virtual Licensing**.
3. Enter the System Number of the installed system.
4. Select the **Customer Name**.
5. The sites and system names for this customer will be listed.
6. Click on the **Create New System** button. You are adding a new system to this customer.
7. Complete all of the required fields (\*) to create the new system. Use a unique name for the new system This will be the new name of the installed system. Click the **Submit** button.
8. The new system name is added to the list of systems for this customer.
9. Select **License Codes > System Upgrade** then, click on **Create New**.
10. On the System Upgrade Quote page, complete all of the required fields. Use the pull-down list to specify the Target System (select a -V Dongle) For the Serial #/System # field enter the new system number created in Step 6.  
The Virtual Dongle ID is the number of the license dongle that was ordered for this upgrade.
11. Click on the **Continue** button. on the new system upgrade quote screen the new customer number (created in Step 6) will show as the **Target System #**.
12. In the Source System field use the pull-down list to select the existing system.
13. In the Source Serial #/System # field enter the system number of the existing system.
14. In the Process Disposition field select **Keep (Non-branded)**.
15. Click on **Continue**.
16. Verify that the licenses and quantities are correct, click on **Continue**.
17. Check-mark the **I Agree** to the above ... box then, click on the **Finalize** button.

18. The EULA will be sent to the customer contact email address.
19. When the EULA has been accepted the license BIN file to be generated then sent to the dealer contact email address.
20. If the license dongle number was not entered in Step 10 an error message dialog will open. click on Continue, go to Step 10, enter the dongle number, follow the remaining steps to finish.

### USB Pass-through Setup

Existing IPedge virtual servers using the virtual licensing service that are upgrading to Off-line (dongle based) licensing require USB port pass-through setup. This setup procedure allows the virtual server VMware® to recognize the license dongle when it is plugged into a USB port on the server.

1. Ensure that the IPedge server has a connection to the internet.
2. Launch vSphere client on the administrator PC.
3. Login to the IPedge server.
4. Select the **Getting Started** tab.
5. Select the IPedge server from the list on the left side of the screen.
6. Click on **Shut down the virtual machine**.
7. Plug the license dongle into a USB port on the IPedge server.
8. Wait for the system to shutdown, about 2 minutes.

**Important!** The IPedge virtual machine must be completely shut down. To view the shutdown progress select the **Console** tab.

9. In the Getting started tab click on **Edit virtual machine settings**.
10. Go to the **Hardware** tab then, click on the **Add** button.
11. In the Device Type dialog select **USB Device** then click on the **Next** button.
12. Select **Aladdin Knowledge Sentinel HL**.
13. Click on **Next**.
14. In the Ready to Complete dialog click on **Finish**.
15. In the Hardware screen you will see the New USB Device, click on **OK**.
16. In the **Recent Tasks** at bottom of the screen wait for this task to complete before continuing.

**Note:** This procedure maps one USB port for license dongle pass-through. Toshiba recommends that you map all of the USB ports for license dongle use. Move the USB dongle to the next available USB port. Repeat Step 7 through Step 16 for each of the USB ports.

17. When all of the USB ports are complete, continue to Step 18.
18. Select **Edit virtual machine settings**.
19. Click on **Edit virtual machine** on the getting started tab in the basic tasks.
20. Click on **Power on the virtual machine**.

21. Allow the IPedge virtual machine to run for two the five minutes to allow all of the processes to startup.
22. Login to Enterprise Manager on the IPedge server.
23. Select **Maintenance > Licensing > License Control**. The system will show **Not licensed**.

## OFF-LINE LICENSING

Licenses are purchased through the Toshiba FYI web site. Use the following procedure to update or add new licenses. The license dongle serial number is entered during the license generation process on the FYI website.

### Download License File

After the licenses upgrade is complete a license file will be sent to the contact email address. Download the license file to the Administration PC. The file can be saved to any file storage unit on a network that the administration PC and the IPedge server can access. Use the following procedure to apply the license file to the IPedge server.

### Upload and Apply License

1. Plug in the license dongle.
2. Login to the Enterprise Manager on the Primary IPedge server.
3. Select **Maintenance > Licensing > License Control**.
4. Select the server to be licensed.
5. Click on the **Upload License** file icon.
6. Enter the location and name of the license file or click on the Browse button to locate the license file.
7. Click on **OK**.  
The license file name, server MAC address and the server name will be displayed. Verify that the MAC address is the correct address for this server. Double click on this line for a detailed list of the licenses.
8. Click to check-mark the uploaded file then, click on the **Apply** icon.
9. After the license is applied, the license result should show "Successful".
10. Then check "**Yes, I want to reboot the system now**" and click on **OK**. Reboot can take several minutes.

### Display License Information

To display the items and quantities licensed on the server.

1. Login to the Enterprise Manager on the Primary IPedge server.
2. Select **Maintenance > Licensing > License Information**.
3. Select the server to display.

To display detailed information about a specific license.

1. Login to the Enterprise Manager on the IPedge server you are going to license.
2. Select **Maintenance > Licensing > License Control**.
3. A list of all the licenses on the server will be displayed.
4. Click to check-mark a license then, click on the **View** icon.
5. After the IPedge server has restarted, login to Enterprise Manager.
6. In Enterprise Manager select **Administration > Enterprise > Servers**.

7. Check the Server Name box and click the **Server Synchronization** icon.
8. The Enterprise - Servers Status screen displays. Check the Table Name box then click on the “**Order database synchronization**” icon.
9. A confirmation dialog window will display. Click on **OK** to start the database synchronization. Wait for the database synchronization to finish. This will take a few minutes.

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## **MAINTENANCE RENEWAL**

The Software Support and Upgrade Service (SUS) is not a license, it is a subscription service. This service provides software updates and enhancements and, technical support. SUS is available in one-year or multi-year increments.

When the SUS approaches expiration or has expired, Enterprise Manager provides an indication when a user logs in to Enterprise Manager.

### **Verify the SUS Renewal**

To verify the billing order for the maintenance request.

1. Login to Toshiba's FYI web site.
2. Select **License Codes > IPedge Virtual Licensing**.
3. Look up the customer then, the system you want to update.
4. On the license summary page you can view the SW Support and Upgrade Service (SUS) Status.
5. If the Launch TSD Maintenance Wizard link is visible, click on this link to use the wizard.  
or  
Click on the Request Upgrade icon.
6. Select the SUS items for this system.

The process is the same as adding any license items. Notice that a new license key is not generate. Login to Enterprise Manager on the IPedge system to refresh then, apply the new license items.

**THIS IS THE END OF THE DOCUMENT.**