Version 2017 Licensing Changes

Overview:
There are a number of important licensing changes to InTouch and System Platform 2017.

Existing Wonderware product versions can upgrade to either 2017 Perpetual model or 2017 Subscription model. If the existing licenses are on an active Customer First contract, the upgrade to Perpetual 2017 would be at no charge per the Customer First Program. An upgrade to the new Subscription model is available as a Functional Upgrade at an associated cost.

Wonderware 2017 software products are license enforced using a new 'Activated' licensing method. Licenses are ‘activated’ with an activation code and that code is associated/locked to the License Server at the customer site resulting in greater license flexibility and improved license compliance. This new Activated licensing makes use of our new License Manager which makes activating, managing, and upgrading licenses simple. This has multiple additional advantages such as: the archestra.lic license files are no longer needed, no more license dongles, no more RDS (T/TP/TF/TPF), Failover, or RDS Concurrent licenses, and no more paper High Availability licenses.

Backward Version Compatibility:
Note that 2017 “Activated” licenses are not backward version compatible, they will not enable previous versions. However, Customer First Upgrades will provide some backward compatibility for certain products as noted below:

DevStudio and AdvDev Studio 2017 “Activated” licenses are not backward version compatible as stated. However, 2017 development licenses will be provided as a bundle of an Activated license and archestra.lic/wwsuite.lic license files which will enable backward version compatibility for the other products that historically were included with the development license. This will allow customers to support older versions.

Advanced Dev Studio 2017 will include licenses for the Advanced Apps (MES, InBatch, WIS, QIAnalyst, etc), however, these licenses will continue to be .lic files on mini CD because these Advanced Apps have not yet moved to the new Activated licensing enforcement. Customers will receive an Activated license and a separate .lic license file on mini license CD.

Adv and Dev Studio RDS will not be offered in 2017. No longer needed due to new Activated licensing which enables either thick or thin(RDS) at user’s configuration choice.

Note, Development Subscription licenses, both the Activated license and the bundled .lic license, will time-out/expire at the end of the subscription term (plus a short 15 day grace period). Both the Development functionality and the Runtime functionality of the Development license will time-out.

System Platform 2017 will include the new Activated licensing for App Server, Historian, and OI Server and will include separate OI Server and WIS Portal archestra.lic license files, delivered separately. Upgrades to System Platform will also include one Historian InSight Perpetual Client license.

InTouch 2017 Runtime and InTouch for System Platform 2017 Runtime “Activated” licenses are not backward version compatible. 2017 Runtime licenses will include the new Activated licensing only.
Customers who desire to run their existing system with 2014R2 licenses or older versions, they should not “activate” any of their 2017 licenses as described in this communication. Also, customers should not use the 2017 System Platform or runtime licenses.

If you have specific questions or concerns, please contact your local InSource representative.

**New Feature Details**
The following are highlights of some of the features of the 2017 version and differences between the 2017 and 2014R2 versions. Keep in mind, to leverage these advantages, all licenses would have to be upgraded to 2017. Otherwise, it is best to not “activate” any 2017 licenses and keep all licenses on the 2014R2 version.

**System Platform 2017:**
**System Platform 2017 offering has been simplified**
- The client for System Platform is renamed ‘Supervisory Client’ and the Activated license enables the new InTouch Operations management interface (OMI) client and the previous InTouch for System Platform technology, which will be referred to as InTouch View Application
- The Supervisory Clients are now offered with and without MSCAL (if using MS SQL Express no MSCAL is required)
- All Supervisory Clients, Historian Clients, and InSight Clients include a WW CAL
- No more RDS/TSE, Concurrent, or Failover parts due to the new Activated licensing and 2017 model
- The included Historian Server is Standard Edition when smaller than 100K Tags
- The number of included OI Server licenses has changed and the System Platform 50K IO and larger now include OI Server Professional.
- The paper licensed Platforms and Sessions are removed from the 2017 offering, no more counting of Platforms/Sessions.
- When adding additional clients to a System Platform it is no longer necessary to have the Application Server .lic license re-generated to add Platforms
- One Historian InSight client perpetual license is now included in each System Platform
- Remote Response Objects is now included at no charge

2017 new Activated licensing simplifies the offering and reduces the number of parts. Therefore, 2017 offering does not require separate RDS, Failover, or RDS Concurrent parts/licenses.

InTouch Access Anywhere can be used in combination with a Supervisory Client or InTouch license, While InTouch Access Anywhere requires being installed on a Server OS configured as a Remote Desktop Server for concurrent sessions, InTouch RDS Concurrent licenses will no longer be offered for the 2017 version and will no longer be required.

System Platform client is renamed: ‘Supervisory Client’. Supervisory Client Activated license enables on a single node, both the new InTouch OMI client and the InTouch for System Platform technology, which will be referred to as InTouch View Application. The Supervisory Client license does NOT enable InTouch Runtime standalone. The Supervisory Clients are now offered with and without an MS CAL (if using MS SQL Express, no MSCAL is required), and all Supervisory Clients include a WW CAL.
A Supervisory Client Activated license also enables thick or thin or Web (InTouch Access Anywhere) clients. So customers can run whichever type of client they want with the same Supervisory Client license. This greatly reduces the number of possible client part numbers. Existing customers upgrading to 2017 can seamlessly migrate their existing InTouch for System Platform clients while new customers can immediately start with the new InTouch OMI.

**Platforms:**
The paper licensed Platforms and Sessions are removed from the 2017 offering, no more counting of Platforms/Sessions. Note though that the ‘Platform’ software deployment function still exists along with the Bootstrap to deploy, however, deployment of Platform software will not be counted or enforced. Paper licensed ‘Platforms’ will no longer contribute to any Customer First calculated value in version 2017 so will not contribute to Customer First payment calculation on renewals. Existing paper licensed Platform parts will not be upgraded to 2017.

**No more RDS (Per Device) or RDS Concurrent parts:**
2017 Activated licensing enables either thick or thin(RDS) client at user’s configuration choice. This simplifies the offering and reduces the number of parts so that separate RDS, Failover, or RDS Concurrent parts/licenses are no longer needed. A user can use the Activated client licenses as “Floating” (Unreserved) OR ‘Reserve’ a license to a particular node. Therefore, System Platform RDS and RDS Concurrent clients will not be offered in 2017 release.

InTouch Access Anywhere can be used in combination with a Supervisory Client or InTouch license, While InTouch Access Anywhere requires being installed on a Server OS configured as a Remote Desktop Server for concurrent sessions, InTouch RDS Concurrent licenses will no longer be offered for the 2017 version and will no longer be required. Existing InTouch for System Platform RDS clients will upgrade to Supervisory Client 2017. So there is no longer a premium price for Concurrent licenses.

InTouch Access Anywhere does not support InTouch OMI applications out-of-the-box. The coming version of InTouch Access Anywhere will be enhanced to support InTouch OMI applications.

System Platform RDS FLB (Failover/LoadBalance) clients will not be offered in 2017. Failover licenses are no longer needed due to new Activated licensing which handles the failover if a Terminal Server goes down. There is no upgrade path for FLB licenses/parts. After customer upgrades to 2017, there will be no FLB parts and no value associated for Customer First annual support calculation at time of renewal.

**Remote Response Objects (RRO) included:**
Remote Response Objects will no longer be an additional cost in 2017, it will be included as standard. Existing RRO licenses do not need to be upgraded and can be removed from Customer First value calculation at time of renewal.

**Historian 2017:**
**New Sizes:**
Historian 2017 size offerings has been expanded with two new sizes to accommodate the market need between 5K Tags and 25K Tags:
- Wonderware Historian 2017 Standard 12,000 Tag
- Wonderware Historian 2017 Enterprise 12,000 Tag
Remote IDAS:
To encourage broader use, there is no longer a license fee for Historian Remote IDAS. Remote IDAS version upgrades from older releases will upgrade to an I/O server license, which will replace Remote IDAS in the Customer First annual value calculation at time of renewal. The Remote IDAS software remains on the media.

Physical Processor Counting:
The number of physical device processors (CPU) that a Historian Server can run on is no longer enforced in 2017.

Historian, Info Server, and OI Servers:
Customer First Upgrades from Historian 2014R2 and previous to Historian 2017 will include separately provided OIServer Standard archestra.lic file and an Information Server Portal/Adv Client archestra.lic license file. This will allow existing customers to maintain their existing functionality.

Historian and MS SQL:
Historian 2017 sized 25000 Tags and lower are fully supported with MS SQL Express and therefore do not require or include a MS SQL Server Standard license. Historian 2017 sized over 25000 Tags include a MS SQL Server Standard 2016 license. This applies to the separately sold Historians, Historian Redundants, and the Historians bundled in System Platform.

Simplified Historian Client offering:
Historian Client 2017 will be offered as Concurrent only. Historian Client Per Device, Per Named Device, and Per Named User will no longer be offered in 2017 dramatically reducing the number of available part numbers. 2017 Activated licensing enables the user to specify how they want to utilize the client license. A user can use the Activated client licenses as “Floating” (Unreserved/Concurrent) or ‘Reserve’ a license to a particular node or user.

All existing Historian Clients upgrading to Historian Client 2017 will upgrade to Concurrent licensing and pricing. The upgrade to concurrent licensing is no charge to Customer First customers, however, the Customer First renewal calculation will be based on Concurrent pricing.

Historian Client and CALs:
Historian Client 2017 includes a WW CAL without MS CAL paper license. Also, Historian 2017 sized 25000 Tags and lower are fully supported with MS SQL Express and therefore do not require or include a MS SQL Server Standard license.

Historian InSight 2017:
Historian InSight 2017 perpetual and subscription models use the new Activated licensing. The 2017 Subscription offering has been expanded to include 3 year and 5 year terms.

Customers owning the initial version of Historian InSight Subscription are eligible to upgrade to version 2017 during the term of their subscription.

InTouch 2017:
InTouch and Activated Licensing:
InTouch RT 2017 uses the new Activated licensing. As stated earlier in the document, the new 'Activated' licensing has multiple advantages such as: the archestra.lic license files are no longer needed, no more license dongles, no more RDS (T/TP/TF/TPF), RDS Concurrent, or Failover parts. So the number of InTouch 2017 parts has been dramatically reduced, while maintaining the functional flexibility as before.

2017 Activated licensing enables the user to specify how they want to utilize the client license. A user can use the Activated client licenses as “Floating” (Unreserved/Concurrent) or ‘Reserve’ a license to a particular node or user.

If a license server contains a mix of InTouch 2017 RT Tag sizes and types, the license administrator will need to ‘Reserve’ the license to specific devices as needed.

Because paper Platform licenses have been eliminated in 2017, separate InTouch Runtime standalone does not require a Platform license when connecting to a Galaxy Repository (GR) 2017. After a customer upgrades to 2017, there will be no ‘Platform’ parts and no value associated for Customer First annual support calculation at time of renewal.

No more RDS or RDS Concurrent parts:
InTouch RDS will not be offered in 2017. No longer needed due to new Activated licensing which enables either thick or thin(RDS) at user’s configuration choice. The only exception is the InTouch RT ReadOnly RDS, which will continue to be offered and licensed separately. This was necessary for technical and OS reasons. Existing InTouch RT Read-only RDS will upgrade to InTouch RT Read-only RDS 2017.

InTouch RDS FLB (Failover/LoadBalance) will not be offered in 2017. Failover licenses are no longer needed due to new Activated licensing which handles the failover if one TServer goes down. There is no upgrade path for FLB licenses/parts. After a customer upgrades to 2017, there will be no FLB parts and no value associated for Customer First annual support calculation at time of renewal. However, load balancing functionality does require separately purchased Activated licensing.

InTouch RDS Concurrent will not be offered in 2017. No longer needed due to new Activated licensing which enables either thick or thin(RDS) at user’s configuration choice. A user can use the Activated client licenses as “Floating” (“Unreserved”) or ‘Reserve’ a license to a particular node. Existing InTouch RT RDS Concurrent will upgrade to InTouch RT 2017. There is no longer a premium price for RDS Concurrent licenses. InTouch Access Anywhere can therefore be used with any InTouch Runtime 2017 license. However, please note that InTouch Access Anywhere requires being installed on a Server OS configured as a Remote Desktop Server for concurrent sessions with the corresponding Microsoft concurrent licenses.

InTouch with IO:
InTouch RT 2017 uses the new Activated licensing. However, as stated above, some current/older OI Servers still require the archestra.lic license files. Therefore, InTouch with IO upgrades to 2017 will include an Activated license (for InTouch 2017 and OI Server 2017) and an OI Server Standard archestra.lic license file to be used by customers running older OI Servers. Note, the archestra.lic license enables only older OI Servers and DAServers, it does not enable any previous version of InTouch. Our OI Server Development team is working hard to enhance all our OI Servers to utilize the new Activated
license so in the future this will no longer be necessary. For details, see below the ‘OI Servers G2’ section.

**InTouch without IO / OI Gateway:**
InTouch without IO license does not include the OI Server functionality. However, the new OI Gateway can be used because OI Gateway is not license enforced. OI Gateway replaces FS Gateway. The unlicensed OI Gateway does not enable MQTT (IIOT functionality). An actual OI Server license is required to enable MQTT.

**Activated Licensing and InTouch Access Anywhere – special note:**
InTouch Access Anywhere does not have a license of its own. It is indirectly tied to WindowViewer. InTouch Access Anywhere can be used in combination with a Supervisory Client or InTouch license, While InTouch Access Anywhere requires being installed on a Server OS configured as a Remote Desktop Server for concurrent sessions, InTouch RDS Concurrent licenses will no longer be offered for the 2017 version and will no longer be required.

Note that while InTouch Access Anywhere can be used on any Supervisory Client or InTouch license, it is only supported with a Windows Server OS configured and licensed (Microsoft licenses) for concurrent sessions in a Remote Desktop (formerly known as Terminal Server) environment. For a number of technical reasons, when using InTouch Access Anywhere, it is not possible to guarantee reserved/per device behavior even if the OS is configured ‘per device’ with the corresponding Microsoft ‘per device’ licenses.

**OI Servers G2:**

**OI Server Licensing:**
New OI Servers and new versions are being released on a regular quarterly basis; go to the GCS website for new downloads. The latest versions are enabled using the new Activated licensing. However, as this updating process across our OI Servers family takes place, some of the older OI Servers/DA Servers continue to require archestra.lic license files. Therefore, to ensure backward version compatibility of OI Servers, 2017 products that bundle an OI Server will include an Activated license and an OI Server archestra.lic license. These products include: InTouch with IO, System Platform, and Historian.

**All OI Servers support the new Activated licensing:**
**Note:** Legacy DAServers and DI Objects do not support Activated licensing (see below)

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Server</th>
<th>Type</th>
<th>Internal Version</th>
<th>Generation</th>
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**Install Update to support Activated Licensing with OI-Core G-2.0**

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The legacy DA Servers and DI Objects still require the archestra.lic license files:

**Latest version of Legacy DA Server or DI Objects That will continue to use ArchestrA.lic**

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</tbody>
</table>

**Best Practices with Activated Development licenses:**
The best practice of using a separate device for Development licenses continues in 2017. Best practices dictate that license administrators should activate Development 2017 Licenses on a separate License Server, separate from the Production License Server. If license administrators instead uses a common central License Server for development and production licenses, then the Development licenses should be Reserved specifically to the development designated devices. These practices will prevent the Development licenses from being used (inadvertently or intentionally) to activate additional runtime licenses.

**Using Development License as a Central Management Policy Continues:**
The policy introduced in 2014 that allows using a Adv or DevStudio to centrally manage separate InTouch RT standalone Apps and ModernApps, like a GR, will continue in 2017. The policy statement is: "The Development license allows central management of InTouch runtime nodes. This includes usage of
WinPlatforms, ViewEngines, and InTouchViewApps for distributing and managing InTouch application versions. Usage of AppEngines and any objects they host require a System Platform license.”

**High Availability and Disaster Recovery:**
The new 2017 Activated licensing has many advantages, one of which is supporting virtualized High Availability (HA) environments Microsoft HyperV and VMWare. Under these HA environments, only one virtualized device is active at a time, so only one Activated license is necessary. This means that there is no longer a need for a High Availability part number or price. Customers who use these virtualized technologies can simply order their 2017 licenses **without** need for ordering an additional High Availability license. There is no upgrade path for existing HA paper license. Customers who own existing Wonderware licenses that are linked to a HA paper license and upgrade to 2017 will **not** upgrade their HA paper license, and that value will not be part of their Customer First annual support renewal.

Disaster Recovery (DR) using virtualized environments like described above also will not require a High Availability paper license. However, Disaster Recovery systems using ‘Warm’ or ‘Hot’ emergency backup technology where the primary system is **shadowed by an active back up system** will continue to DR licenses on a separate License Server at the DR remote site.

**Toolkits:**
2017 Toolkits are not being released concurrently with the 2017 release. However, existing Apps created with our 2014 Toolkits will work with the 2017 release. 2017 Toolkits will be released at a future date.

**New Activated Licensing Notes:**

**Activated Licensing Basics:**
Wonderware 2017 software products are license enforced using a new 'Activated' licensing. Licenses are ‘activated’ with a code and that code is associated/locked to a License Server at the customer site resulting in greater license flexibility and improved license compliance. This has multiple additional advantages such as: the orhestra.lic license files are no longer needed, no more license dongles, no more RDS (T/TP/TF/TPF), Failover, or Concurrent parts, and no more paper High Availability part. However, load balancing functionality does require separately purchased Activated licensing for each TServer.

2017 Activated licensing does not enforce thick or thin (RDS) clients differently. It does not enforce RDS Per User or Concurrent use differently either. Per Device or Concurrent behavior depends on the corresponding Server OS configuration and Microsoft licensing. Users activate their license and then decide how they want that license to be used and configure the license accordingly. For example, users can reserve a particular functionality, such as a Supervisory Client, to a particular device.

For InTouch RT licenses, if a customer has a mix of runtime licenses (of different IO counts/capability specification) hosted in the same License Server, then the License Manager administrator will need to reserve these licenses to the appropriate devices, based on the required counts/capabilities, to ensure users get the license type they need on their device.

**License Timeout:**
Development Subscription and Consignment Activated licenses will expire at the end of the subscription term (plus a small 15 day grace period).
Activated License is not Backwards Version Compatible:
Also note that 2017 Activated licenses are not backward version compatible, they will not enable previous versions. Customers can still purchase previous versions of Wonderware products if needed.

The two exceptions that continue to require archestra.lic license files are Information Server 2017 and some of the older OI Servers/DA Servers. Therefore, for 2017 products that bundle an OI Server license, an Activated license and an OI Server archestra.lic license will be provided. These products include: InTouch with IO, System Platform, and Historian. Simply order the 2017 product part number and the two types of licenses will be provided, Activated and .lic, we will handle the proper association and delivery to you.

2017 Customer First Upgrades:
Customers with previous version product licenses on active Customer First support will be allowed to maintain their existing functionality when they upgrade to 2017. For example, Customer First upgrades to System Platform 2017 will include an Information Server 2017 archestra.lic license file.

Wonderware software prior to 2017:
Wonderware software prior to 2017 does not work with the new Activated licensing. It is not possible to get Activated licenses for older software. This is why we include archestra.lic licenses for backward version compatibility in some cases.