



# @RISK/DecisionTools Suite 8 License/Installation Guide

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*This short guide is designed to help you install and license your new Palisade product. It applies equally if you have purchased @RISK individually or the entire DecisionTools Suite including @RISK, Evolver, NeuralTools, PrecisionTree, StatTools, and TopRank.*

*Please note: This document is written for end-users. If you are an IT professional configuring a concurrent network license or an academic course license, please consult the documentation that comes with your network server installer.*

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# System Requirements and Recommendations

## Supported Windows Versions

Palisade products require Windows 7 (SP1 or later), Windows 8, or Windows 10.

While there is no support for running on the native Macintosh OS, Palisade products will run on a Windows environment hosted on the Mac. The following configurations are supported:

- Windows 7 through Windows 10, using Boot Camp.
- Windows 7 through Windows 10 emulation using Parallels, VirtualBox, or VMware.

## Supported Office/Excel Versions

An installed copy of **Excel for Windows is required**. The following versions are compatible with Palisade products:

- Microsoft Excel 2010
- Microsoft Excel 2013
- Microsoft Excel 2016
- Microsoft Excel 2019
- Office 365 for Windows

Palisade add-ins will not run with earlier versions of Microsoft Excel.

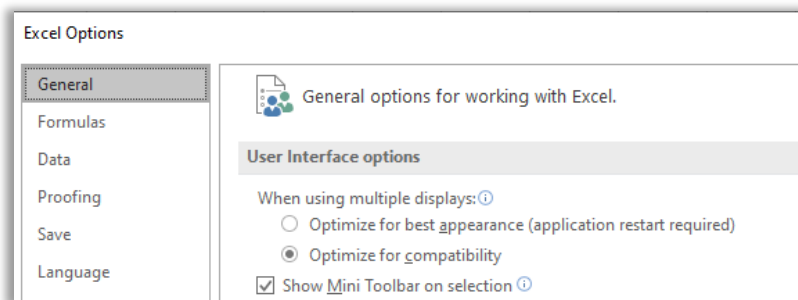
The software is compatible with the “On Premises” deployment option of Office 365. It is not compatible with the “Office on Demand” or “Office Web Apps” deployment options.

Office comes in two flavors: 32-bit and 64-bit. All Palisade products are compatible with both.

@RISK is not compatible with non-Microsoft spreadsheet packages.

## Multiple Monitors

In more recent versions of Excel, there is an option for controlling how multiple display configurations with different densities (DPI settings) are handled by Excel. This setting can be found in the main Excel Options menu. (In some versions of Excel, there is a shortcut for this setting on the taskbar at the bottom of the Excel window.)



While efforts have been made to make @RISK 8 work with the “Optimize for best appearance” mode of operation, @RISK 8 will work best with the “Optimize for compatibility” option.

## License Types

There are several classifications of licenses that can be obtained from Palisade.

### Trial Licenses

Palisade offers a trial version which you can use to evaluate the software. While the software is fully functional, it will only work for 15-days. It will also display watermarks on charts and graphs, and occasionally display messages during various operations

Please see the section *Installing the Software* later in this document for detailed information on how to install the trial version on your computer.

### Standalone Commercial Licenses

A standalone commercial license is meant for an individual installation on a single computer. When you purchase such a license, either from Palisade’s online shopping cart or by contacting Palisade’s sales department, you are sent a download link and a license activation code.

New standalone licenses are generally subscription based, and depending on what you purchased, must be renewed every 1, 2, or 3 years. Older legacy licenses may use a different licensing model.

Please see the section *Installing the Software* later in this document for detailed information on how to install the software and activate the license. Depending on your situation, you may do this yourself or you may choose to ask your company’s IT department for help.

### Standalone Student Licenses

A standalone student license is meant for an individual installation on a single computer. You can only purchase these licenses from Palisade’s website, and to do so you must affirm that you are a registered student in a certified academic program and that you will use the software only for academic purposes. When the online transaction is complete, you will be sent a download link and an activation code.

While the functionality of the student version is not limited in any way, the license will expire one year from when it is activated. In addition, watermarks will appear on charts and graphs indicating that the intent of the software is for academic use only.

Please see the section *Installing the Software* later in this document for detailed information on how to configure the software and activate the license.

## Textbook Licenses

Licenses of Palisade software are bundled with several textbooks. The books include a link to download an installer and certificate-based license of the DecisionTools Suite. Students will need to have the textbook available during the download process in order to confirm they have the rights to the license.

Textbook licenses are good for one year, and include certain restrictions on model sizes as well as academic watermarks on graphs.

After downloading the installer, double-click on it and follow the directions it provides.

## Concurrent Network Licenses

A concurrent network license is purchased by a commercial organization to allow a fixed number of end-users to simultaneously use the product. (Any number of computers can *install* the software, but only a fixed number can actually use the software at the same time.) The license resides on a central server that is setup and maintained by IT professionals in the organization.

To use such a license in your organization, contact your company's IT department for instructions.

## Course Licenses

A course license is purchased by academic institutions for classroom use. The installation and licensing of the product on end-user computers is typically performed by IT professionals in that organization.

Course licenses typically expire after one year and have model limitations and graphical watermarks to prevent their use in commercial situations.

To use such a license in your organization, contact your institution's IT department for instructions.

## Upgrading Version 5.x-7.x Licenses with Maintenance

If you have an existing license of a previous version (5.x, 6.x, or 7.x) of Palisade software *and you have a current maintenance plan*, that plan entitles you to a version 8.x license upgrade.

If you are using a standalone commercial license, you can use Palisade's automated portal to obtain an updated installer, license, and activation key. Please visit <https://www.palisade.com/updates/> for more information.

For other upgrade situations, please contact Palisade, and we will help you with the upgrade process.

## Installing the Software

If you have just requested a trial version or purchased a new standalone license (either commercial or student license) please follow these steps to install your software.

**Note:** If you are using a commercial network license or course license, the IT department at your organization will have different instructions on how to install the software on your computer.

**Note:** If you have already installed the software, typically because you have been evaluating a trial version, you do not need to reinstall the software. Instead see the section

*When the program starts*, it will first start Excel, and then load the add-in once Excel is running; a tab will be added to Excel's ribbon for the running product.

Activating a New License later in this document.

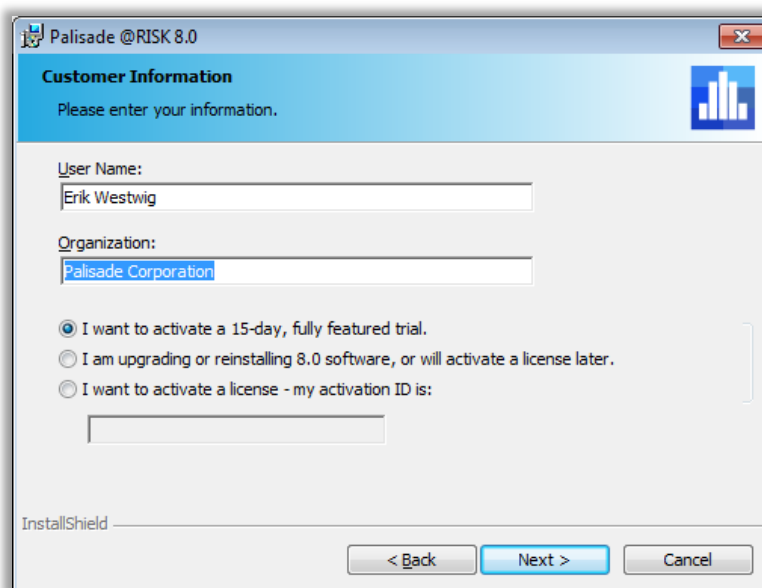
## Download the Software

When you purchase a license – either through Palisade's online shopping cart or through the sales department – you will receive an email that includes your license key and a link to download the installer for your purchased product. Click the link in the email to begin the download, and save the installer to the desired location on your computer.

## Run the Installer

Once the installer has finished downloading, double-click it and follow the prompts to begin installation.

During the installation process, you will be presented with this dialog:



The screenshot shows a Windows-style dialog box titled "Palisade @RISK 8.0". The dialog has a blue header bar with the text "Customer Information" and "Please enter your information." Below the header, there are three input fields: "User Name:" with the text "Erik Westwig", "Organization:" with the text "Palisade Corporation", and a radio button selection area. The first radio button is selected and labeled "I want to activate a 15-day, fully featured trial." The second radio button is labeled "I am upgrading or reinstalling 8.0 software, or will activate a license later." The third radio button is labeled "I want to activate a license - my activation ID is:" followed by an empty text input field. At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel". The "Next >" button is highlighted in blue. The bottom left corner of the dialog box contains the text "InstallShield".



After entering your name and organization, choose one of the following:

**If you are installing a trial version** – choose the first option. This will install a temporary 15-day license on your computer. Repeated installs will not extend this trial period. If you later purchase a license, follow the directions in the

*When the program starts*, it will first start Excel, and then load the add-in once Excel is running; a tab will be added to Excel's ribbon for the running product.

Activating a New License section of this document.

**If you have a license code you have purchased** - choose the last option and carefully enter your activation ID code in the field provided. At the end of the installation, the installer will attempt to contact Palisade and automatically activate the software using the ID you entered. If this succeeds, no further action is required on your part.

If this fails (perhaps because of a restrictive firewall, lack of Internet connection, or for whatever reason) the code can be entered into the License Manager. See the

*When the program starts*, it will first start Excel, and then load the add-in once Excel is running; a tab will be added to Excel's ribbon for the running product.

Activating a New License section, later in this document.

### Start the Software

To launch the software, either double-click its icon on your Desktop, or go to the Start Menu and begin typing the program name (e.g. @RISK) and select the program from the search results.

When the program starts, it will first start Excel, and then load the add-in once Excel is running; a tab will be added to Excel's ribbon for the running product.

## Activating a New License

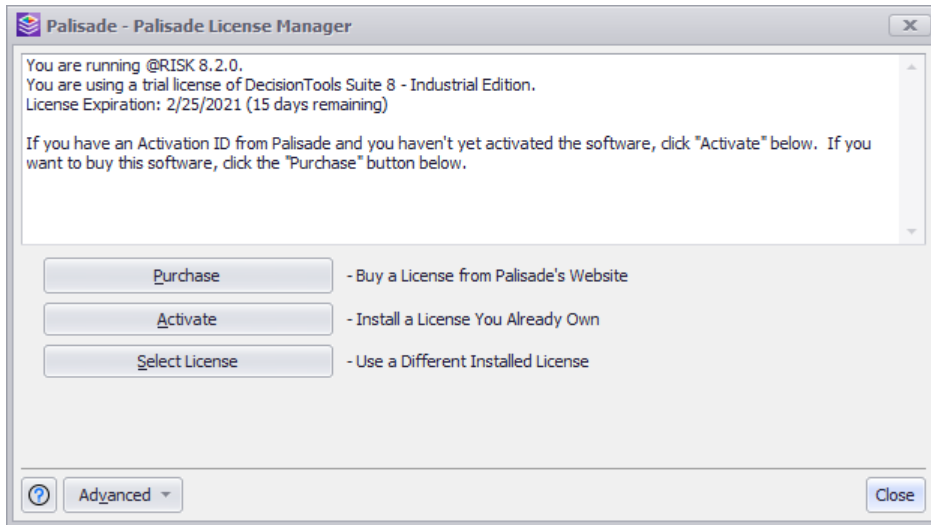
If you have already installed the software and want to use a new license that you have purchased, it is not necessary to reinstall the software. Instead, you can use the License Manager to activate your new license from within the software itself.

**Note:** A video demonstration of this procedure can be found at <https://www.palisade.com/support/activation.asp>.



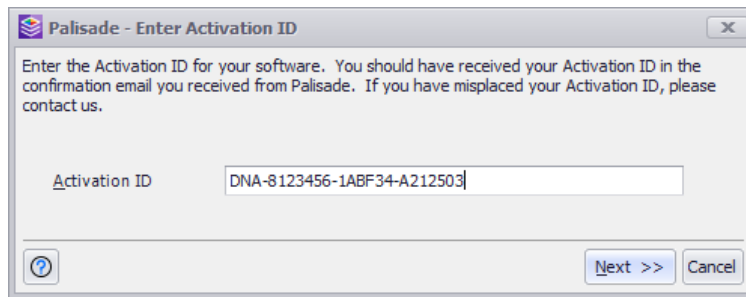
## Step 1: Display the License Manager

In @RISK, the License Manager can be found on the @RISK menu, the left-most item on the @RISK ribbon. For other Palisade products it can be found on the Help menu of the ribbon.



## Step 2: Enter the Activation ID

Click the Activate button of the License Manager dialog, which will prompt you to enter the activation code you received from Palisade:



When you click the "Next" button, the software will attempt to send this activation ID over the internet to Palisade. If you have entered a valid license, and your internet settings allow you to talk to Palisade, that's all you need to do. The entire process should take less than 30 seconds.

Your firewall settings may need to be configured to allow this communication. Our licensing servers are:

**<https://service.palisade.com>**

and

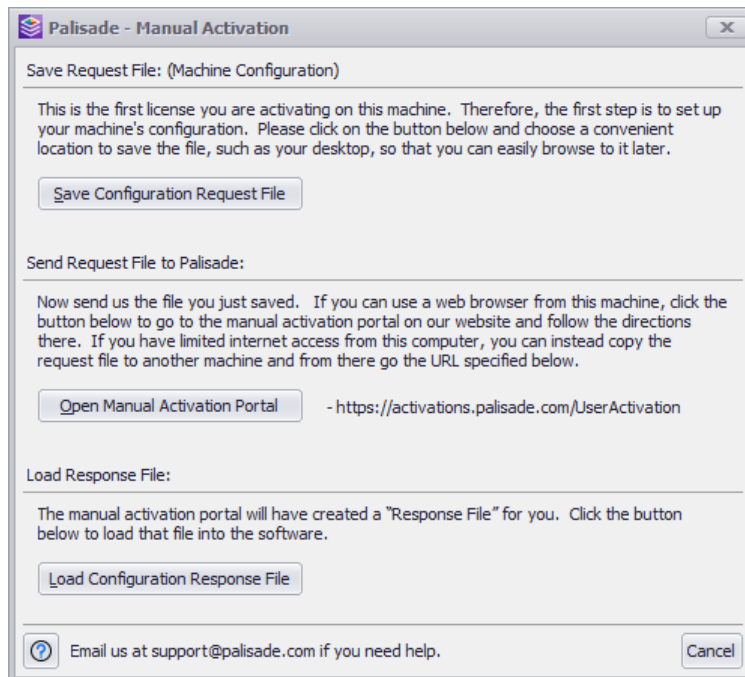
**<https://service2.palisade.com>**

Access to both of these servers is required. Palisade uses the HTTPS protocol (TCP/IP port 443) for communication between products and the activation server.

### Step 3: Manual Activation (Optionally, for Machines with Limited Internet Access)

If you have restricted Internet access, or if Automatic Activation fails for some other reason, you can use Manual Activation. In brief, Manual Activation generates a “request file” which you will send to Palisade, either via email or through our website. We will return to you a “response file” which grants you authorization to use the software. (Depending on your system, you may need to repeat this request-response twice.)

The License Manager dialogs lead you step by step through this process. While this method takes much more time than Automatic Activation, it avoids the difficulties associated with restricted Internet access.



### Step 4: Use the Software

Once activation is complete, you are ready to use the software!

You may need to later return to the License Manager to renew a subscription, move your license to a different computer, or otherwise change the license you are using.

## Uninstalling the Software

The only method for uninstalling Palisade products is through Windows' **'Add or Remove Programs'** feature. From the Start Menu, go to Settings, and open the Add or Remove Programs settings. Search for the product to be uninstalled, and follow the prompts to complete installation.

**Please note:** During uninstallation, the Palisade License Manager will prompt you to select whether or not you want to deactivate the active license. If you are going to use the current license on a different machine, select Yes. If you are going to reinstall the software on the same machine, select No.

## Moving a License to a Different Machine

If you need to move your license from one computer to another (for example, if an old computer is being replaced with a new one) the license must first be deactivated on the old computer and then activated on the new computer. **Note:** A video demonstration of this procedure can be found at <https://www.palisade.com/support/movelicense.asp>.

If you are uninstalling the software from the old computer, you will be automatically prompted to deactivate the license during that process. If you are not uninstalling the software from the old computer, you can deactivate it directly from License Manager. Click the "Deactivate" button. This will walk you through a process very similar to the one described above in the

*When the program starts, it will first start Excel, and then load the add-in once Excel is running; a tab will be added to Excel's ribbon for the running product.*

Activating a New License section.

Once you have successfully deactivated the license, it is returned to the Palisade server and ready to be reused on the new computer. Following the directions in the *Upgrading Version 5.x-7.x Licenses with Maintenance*

If you have an existing license of a previous version (5.x, 6.x, or 7.x) of Palisade software *and you have a current maintenance plan*, that plan entitles you to a version 8.x license upgrade.

If you are using a standalone commercial license, you can use Palisade's automated portal to obtain an updated installer, license, and activation key. Please visit <https://www.palisade.com/updates/> for more information.

For other upgrade situations, please contact Palisade, and we will help you with the upgrade process.

## Installing the Software and

*When the program starts, it will first start Excel, and then load the add-in once Excel is running; a tab will be added to Excel's ribbon for the running product.*

Activating a New License sections above, configure the new computer to use the software.

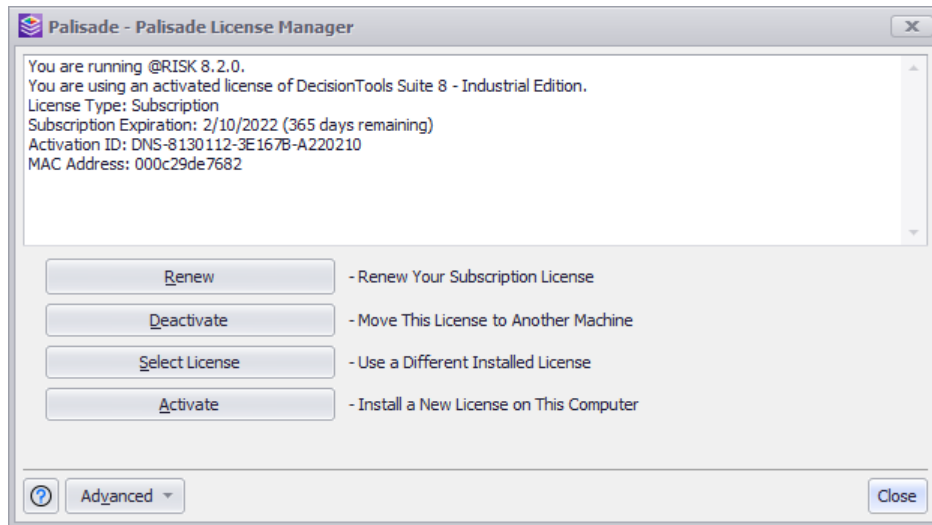
Please keep in mind that Palisade requires at least 90 days between transfers of a standalone license. If your situation is such that frequent license transfers are needed, please contact Palisade's sales team for information on Concurrent Network licensing. Transferring a single user license does not permit the simultaneous use of the Palisade software on two machines.

## Renewing a Subscription License

Subscription licenses of Palisade products must be renewed every 1, 2, or 3 years depending on the details of the license you purchased. To renew your software, please use the following steps:

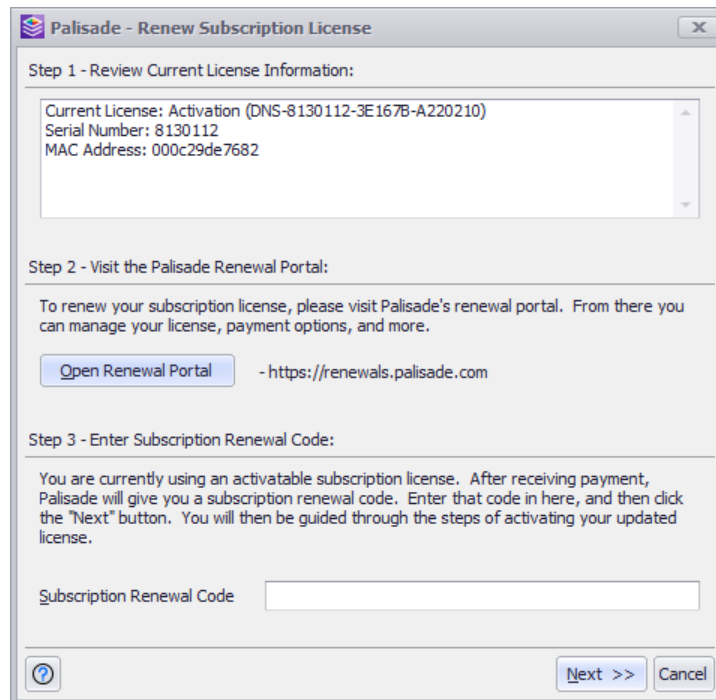
### Step 1: Display the License Manager

In @RISK, the License Manager can be found on the @RISK menu, the left-most item on the @RISK ribbon. For other Palisade products it can be found on the Help menu of the ribbon.



## Step 2: Click the Renew Button

This will take you to the renewal screen of the License Manager.



Clicking on the “Open Renewal Portal” button will direct you to a web page which will guide you through the process. At the end, Palisade will send you both an updated activation ID and a short “renewal code.”

## Step 3: Enter the Renewal Code and Reactivate the Software

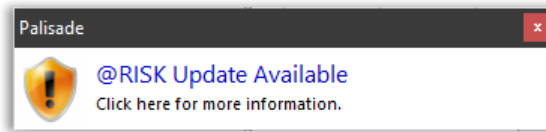
Type in the 7-digit renewal code into the subscription renewal dialog and click the “Next” button. You will then be prompted to reactivate the software following similar steps described in the

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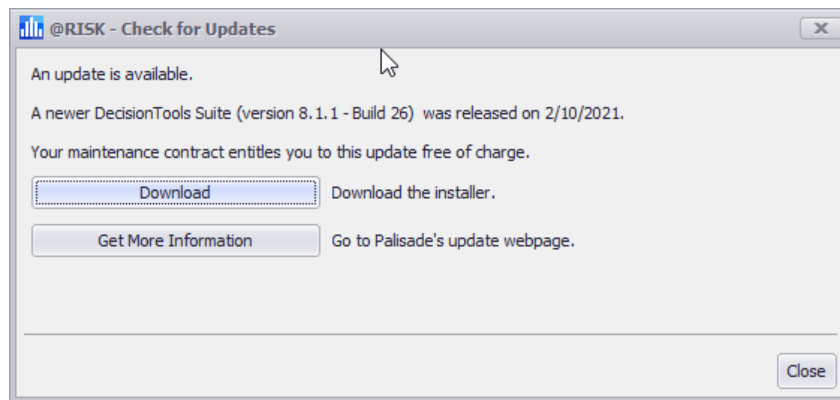
Activating a New License section of this document.

## Version 8 Software Updates

Periodically, Palisade will release updates to the software. When such an update occurs, you will be informed the next time you start the software:



By clicking on the update message (or by manually checking for updates in the software) you can find out more details:

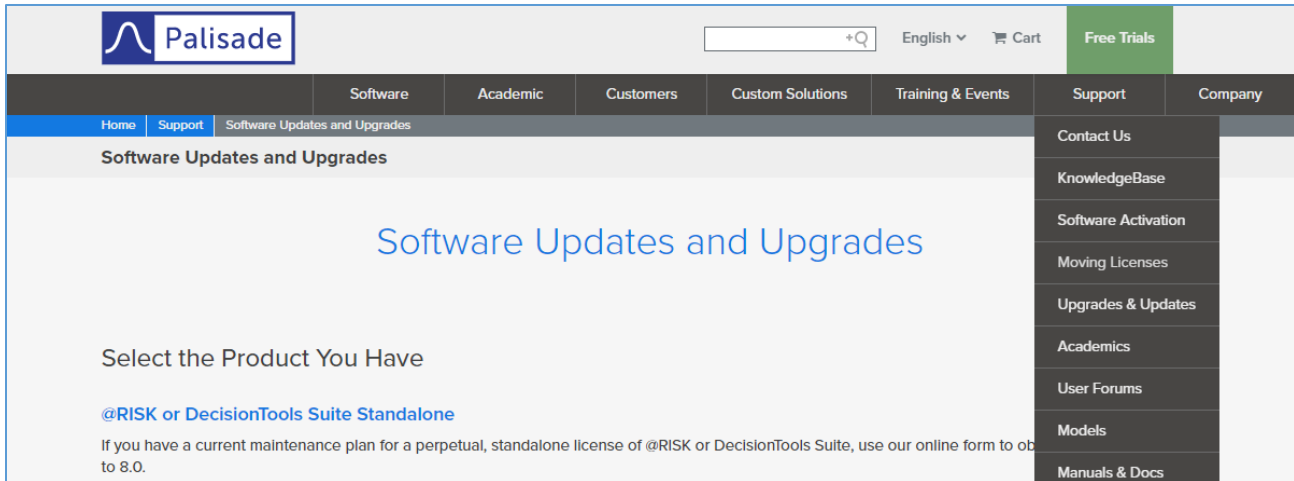


Clicking the "Install" button will shut down the software, download the update from Palisade, and install it. To manually save the installer so you can perform the update at a later time, click the "Download" button.

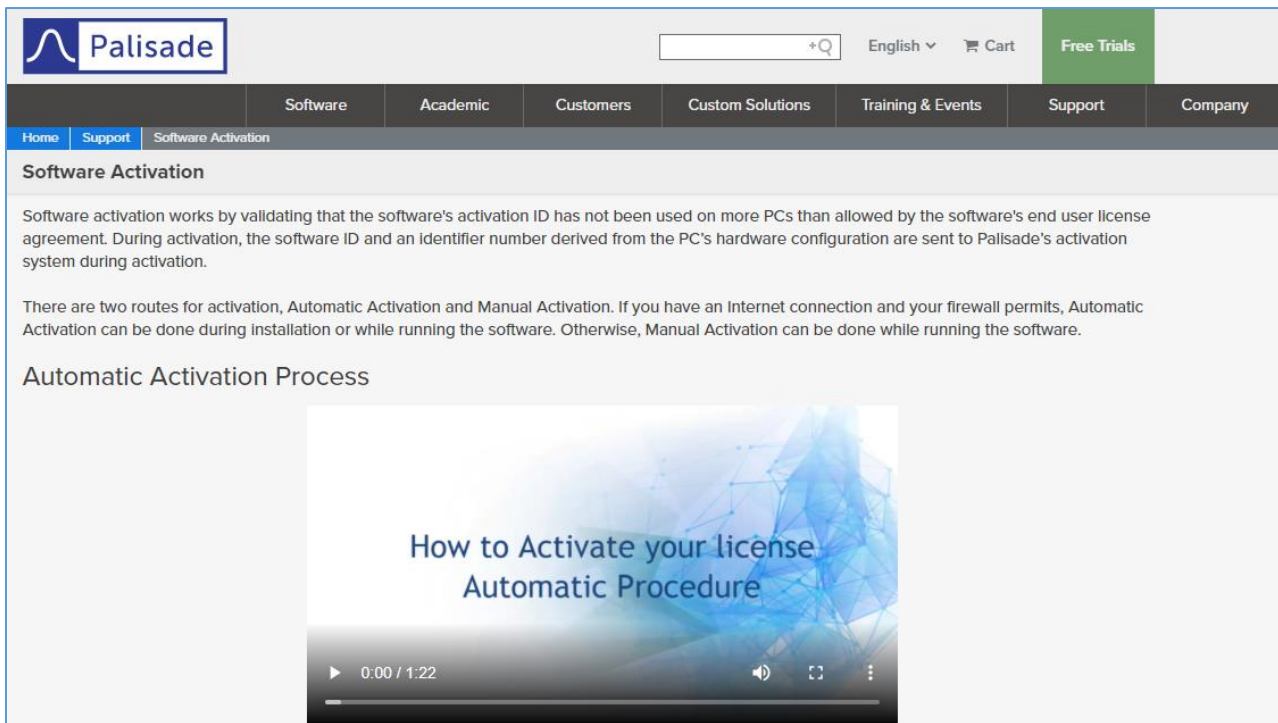
## Troubleshooting Installation and Licensing Problems

Palisade's Tech Support team is ready to help you with your licensing or installation issues, should they arise. On the Tech Support web page - <https://www.palisade.com/support/> - you will find the different options available for reaching the Tech Support team for help with any issues with the software.

**Please note:** when using any of the support options, always have your product serial number handy.



The three most common problems that you may encounter when installing your software are covered by topics on the Support page; these topics are **Software Activation** and **Moving Licenses**, both under the Set Up section, and **Upgrades & Updates** under the Upgrades section. There are videos and clear explanations of the step-by-step instructions to be followed. The screenshot below shows an example of the Software Activation page.



Example of Software Activation video

If you cannot find what you need, Palisade's online knowledgebase can be found at <https://kb.palisade.com/>.



Otherwise, Tech Support can be contacted using the email [support@palisade.com](mailto:support@palisade.com). When opening a request through email, please make sure to include the following information in the email:

- Your Windows® operating system
- Your Microsoft Office® version
- Your product serial number
- The steps you followed that led to the issue you are experiencing

### Expired License

If you have a subscription license that has expired, follow the procedure outlined in the

*Renewing a Subscription* License section of this document.

If you are using a different type of license that has expired, please contact Palisade sales team. Palisade’s contact information can be found at [https://www.palisade.com/about/contact\\_us.asp](https://www.palisade.com/about/contact_us.asp).

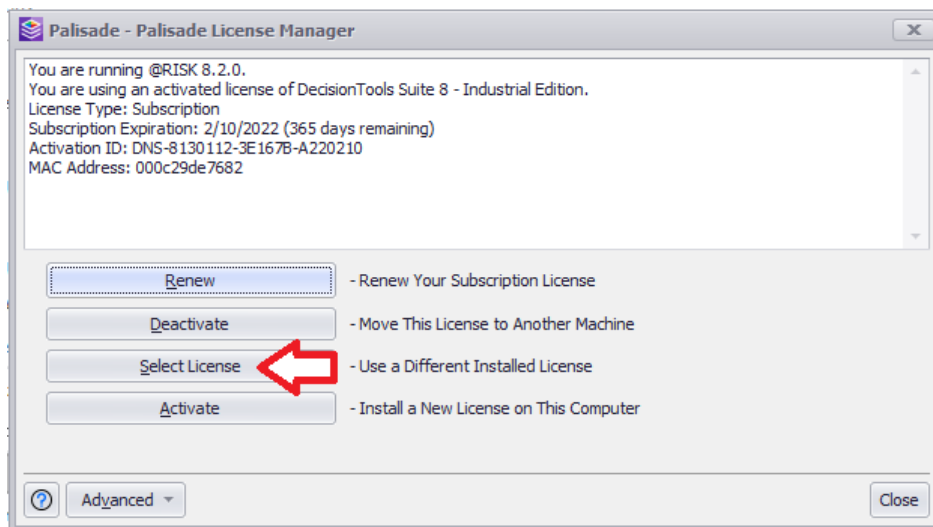
### Broken License

If you significantly change your hardware or operating system, sometimes the licensing system will think that you have copied your license to another machine and the license will be flagged as “broken.”

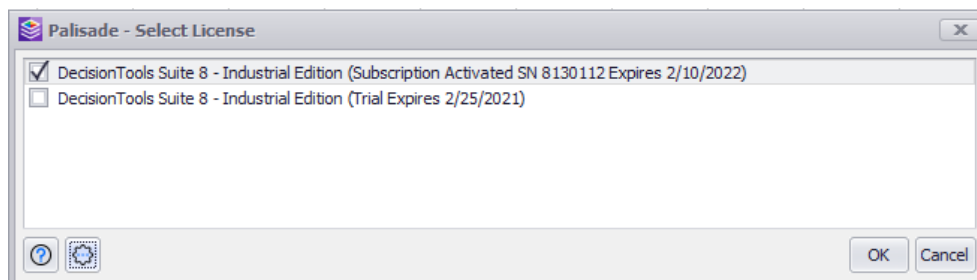
See the Palisade KB article <https://kb.palisade.com/index.php?pg=kb.page&id=1299> for instructions on how to fix your license.

### Selecting a Different License

Sometimes you will have multiple licenses on the same machine. If you need to change license, click the “Select License” button in the License Manager:



This will display a dialog from which you can select a different license. It may take several minutes for the product to scan your computer looking for all available licenses.



Select the license you wish to use, and click the OK button.

By clicking the Settings/Action “gear” button at the bottom of the dialog, you can configure your machine to look for a license over a network. This will typically be done by an IT professional in your organization, and the details are beyond the scope of this document.

Licenses on your machine that cannot be used, typically because they are either expired or broken, are shown in this list, but are greyed out.