

QUE\$TOR



Licensing Notes QUE\$TOR

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Overview

This installation guide explains how to set up licensing for S&P Global software using the Gemalto licensing system. This guide covers three main areas

- User activation of standalone licensing
- User activation of network licensing
- Guide for administrator setup of network licensing

Terminology

The Entitlement ID is an alpha-numeric code which will be delivered to the license contact via an entitlement certificate email; this ID is used to gain access to the entitlement management system to activate licenses. From now on it will be referred to as the EID.

The Gemalto Sentinel RMS License Manager is the service that administers the network licenses for S&P Global applications. From now on it will be referred to as the License Service.

The Network License Manager is the interface to the License Service, where you can activate / deactivate licenses and view license usage and current users. From now on it will be referred to as the License Manager.

Best practice

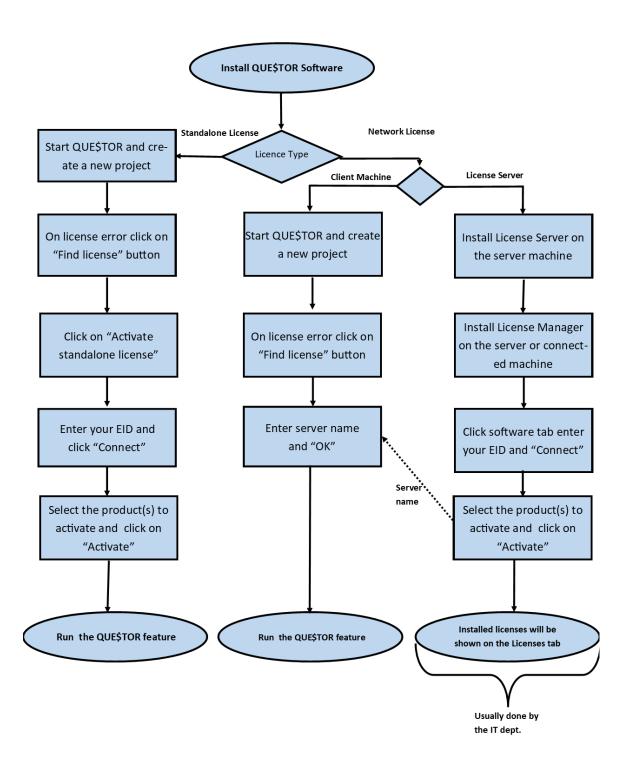
We recommend the following:

- Activate / deactivate licenses using the S&P Global tools supplied with the application.
 - For network licensing, use the Network License Manager application from either a client or server machine.
 - For standalone licensing use the StandaloneOnlineActivation tool, which you can launch from the Find license dialog within QUE\$TOR.

Please do not activate licenses using the EMS Customer Portal unless instructed to do so by a customer care representative.

Installation flowchart

This flowchart provides a high-level workflow for installing S&P Global software such as QUE\$TOR.



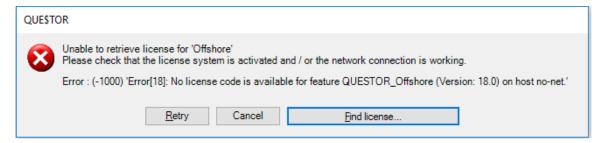
Standalone Licensing

This section will cover activating and deactivating a standalone licenses and moving a standalone license from one machine to another. To activate a standalone license you will need to have QUE\$TOR installed, you also need to have your Entitlement ID (EID).

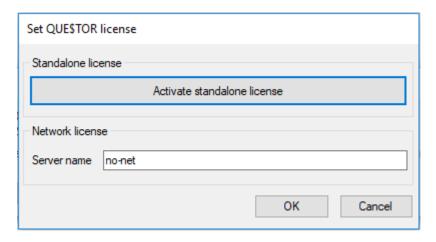
Standalone licenses will not allow QUE\$TOR to work in a shared use environment such as Remote desktop or Citrix. Shared use environments require network licenses.

Activating standalone licenses

When QUE\$TOR is run and a feature is selected, without access to a valid license, as would typically be the case when QUE\$TOR is first installed, an error will be shown similar to the one shown below.



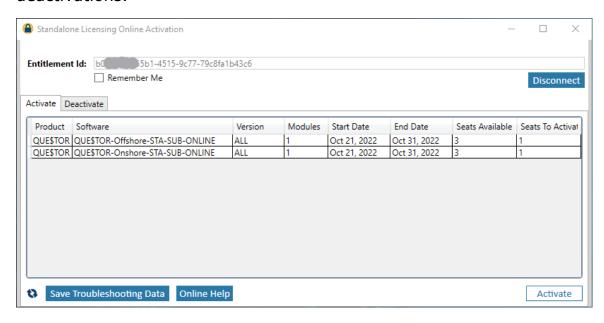
To activate a standalone license click on the Find license... button. If the wrong feature has been selected click Cancel button and click on the new project icon to access the correct feature.



When the Set QUE\$TOR license form appears click on the Activate standalone license button.

This will open the Standalone Licensing Online Activation tool.

First you will need to copy / paste or type your EID into the Entitlement Id input at the top of the form and click Connect. Selecting the Remember me checkbox will save the EID for future activations or deactivations.



Next select the product(s) you would like to activate. Holding the Ctrl key while selecting will allow selection of multiple products. Then click on the Activate button.

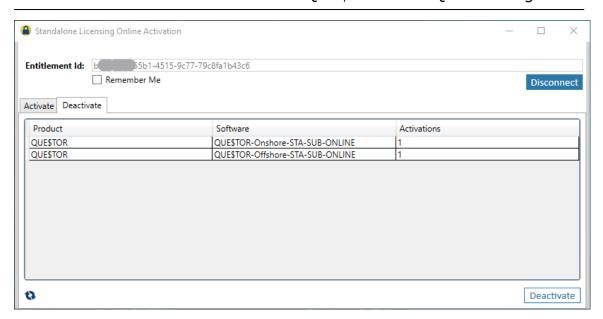
Once complete the Standalone Licensing Online Activation tool can be closed and OK can be clicked on the Set QUE\$TOR license form. QUE\$TOR will now run the feature licensed.

Deactivating standalone licenses

If a standalone license is no longer required or the license is to be transferred to another machine the active licenses should be deactivated.

Ensure QUE\$TOR is closed. Browse to the application installed path (By Default "C:\Program Files (x86)\SPGlobal\QUE\$TOR xx.x") and run the StandaloneOnlineActivation.exe tool.

Next you will need to copy/paste or type your EID into the Entitlement Id input at the top of the form and click Connect. Selecting the Remember me checkbox will save the EID for future activations or deactivations.



Next select the Deactivate tab followed by the product(s) you would like to deactivate. Holding the Ctrl key while selecting will allow selection of multiple products. Then click on the Deactivate button.

Once complete the Standalone Licensing Online Activation tool can be closed. Following this QUE\$TOR will not be able to run the feature(s) unless another license is provided.

Transferring standalone licenses

Standalone licenses can be transferred from one machine to another within the limitations of the terms of agreement.

If a machine currently has an active valid QUE\$TOR license that needs to be transferred to a second machine it should first be deactivated following the instructions noted above, subsequently the license can be activated on the second machine following the instructions noted above.

Standalone licensing without internet access

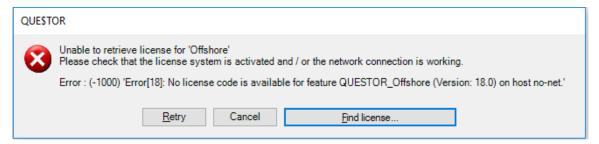
Standalone license activation as described here requires the machine being licensed to have access to the internet in order to validate the license. If the machine requiring a license is not able to connect to the internet it is possible to obtain the licenses on a second machine with access to the internet and transfer to the machine requiring the license. For more information on this please **Contact us**.

Network Licensing

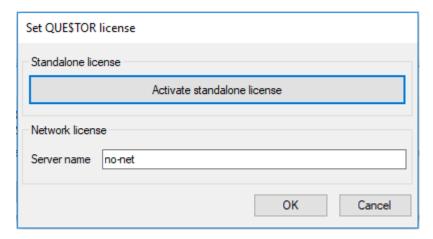
To connect a client machine to a network license service you will need to have QUE\$TOR installed, you also need to have the location of the QUE\$TOR license service on your internal network.

Setting network license location

When QUE\$TOR is run and a feature is selected, without access to a valid license, as would typically be the case when QUE\$TOR is first installed, an error will be shown similar to the one shown below.



To connect to a License Service click on the Find license... button. If the wrong feature has been selected click Cancel button and click on the new project icon to access the correct feature.



When the Set QUE\$TOR license form appears type the license server name in the Server name input box then click on OK button.

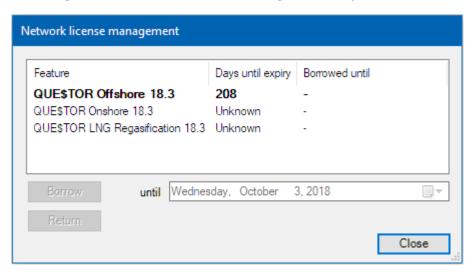
The license server name can be the simple name or the fully qualified domain name.

Once complete the QUE\$TOR will be able to run the feature(s) available on the license server if a valid license is available.

Network License Management

The network license management utility allows you to view, borrow and return network licenses. It can be accessed from the **Tools** menu.

Clicking on network license management opens the form shown below.



Feature

The feature column shows the available network licenses. The features that QUE\$TOR is currently using are shown in bold.

Days until expiry

The days until expiry column indicates how many days there are before a feature expires. This will only be shown for features that QUE\$TOR is currently using.

Borrowed until

Features can be borrowed from the server and returned at a later date. When a feature is borrowed, the last date before the feature is automatically returned is shown in the borrowed until column of the list.

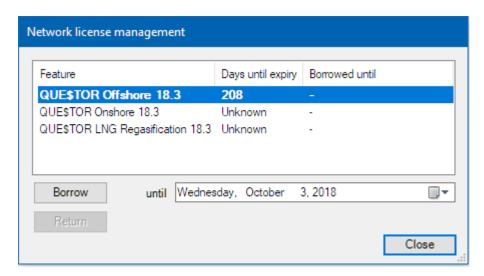
Borrowing Network Licenses

A feature can be borrowed from the server for a period of time, this is sometimes referred to as checking out a license or obtaining a commuter license. Borrowing a feature will allow you to continue to use the feature without requiring a connection to the network license server.

During the period that the feature is borrowed, it will not be available for other users on the network license server. For example, if you have 2 network licenses for the QUE\$TOR Offshore feature then borrowing one of them will leave only 1 license for the QUE\$TOR Offshore feature on the network license server.

At the end of the borrow period the feature will expire automatically on the computer that it was issued to. At this point the feature will be added back to the network license server.

Note: A connection to the network license server is required to borrow a feature, but the feature will be returned automatically to the server with or without a connection to the network license server.



To borrow a feature from the network license server

- · Select the desired feature in the list.
- Set the borrow until date to be the last day you want to borrow the feature until.
- · Click the Borrow button.

To return a feature to the network license server

- · Select the desired feature in the list.
- · Click the **Return** button.

Note: A connection to the network license server is required to return a borrowed feature before the end of the borrow period.

Restrictions

The following restrictions apply when borrowing licenses:

- Not all features can be borrowed. This is determined by the license that is issued.
- Features may only be borrowed for a restricted period. The maximum length of time a feature may be borrowed for is specified in the license.
- When borrowing a feature there must be a spare license for that feature on the network license server.

Network License Administration

This section will cover obtaining and setting up the License Service and License Manager required for a network license, as well as activating the licenses. To activate a network license, you will need to have administrator access to the server on which the License Service will be installed and a machine with internet access and network access to the server, you also need to have your Entitlement ID (EID).

Downloading Network Licensing Tools

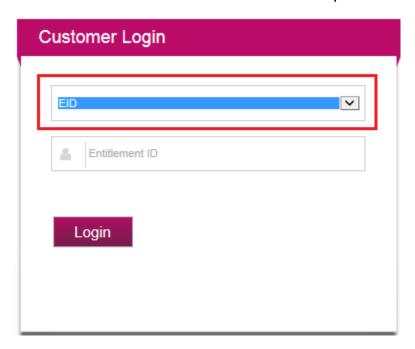
The network licensing tools for the License Service and License Manager can be downloaded from the QUE\$TOR_software_resources page or from the Entitlement Management System (EMS).

To download network licensing tools for the License Service and License Manager:

Go to the EMS Customer Portal:

https://softwarelicensing.ci.spglobal.com/ems/customerLogin.html.

Ensure that **EID** is selected from the drop-down list.

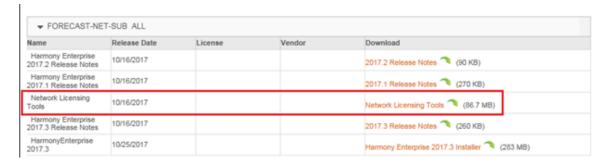


Paste your EID (from your entitlement certificate email) in the **Entitlement Id** field and click the **Login** button.

Click the **Downloads** button.



Click the **Network Licensing Tools** link.



Extract the contents of the downloaded zip file, which contains installers for the License Service and the License Manager.

Installing the License Service

To install the License Service, double-click **setup.exe** in the License Service installer folder you extracted, and follow the InstallShield wizard. No custom settings are required.

The License Service uses port number 5093, so ensure that this port is open on your network.

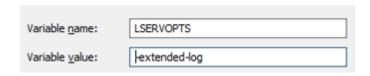
Best practice

Enable the extended logging option for the License Service usage logs, as this provides more detailed logs. (Usage logs are created by default.)

Create a system environment variable with the following parameters:

Variable Name: LSERVOPTSVariable Value: -extended-log

Restart the License Service.



Usage log files are saved to: \Windows\SysWow64 and are named lservsta, lservsta.00, lservsta.01 etc.

Installing the License Manager

The License Manager can be installed on the same machine as the License Service, or on one or more machines with connectivity to the server. The machine running the license manager also needs internet connectivity to activate and deactivate licenses.

To install the Network License Manager, double- click **NetworkLicenseManager.exe** in the License Manager folder that you extracted, and follow the InstallShield wizard. No custom settings are required.

Network License Manager

To set up a network licensing system, you need to download and install network licensing tools:

The License Service folder contains the installer for the Sentinel RMS License Manager. The Sentinel RMS License Manager is the service that administers the network licenses for S&P Global applications, and from now on will be referred to as the License Service.

The License Manager folder contains the installer for the Network License Manager. The Network License Manager is the interface to the License Service, where you can activate / deactivate licenses and view license usage and current users. From now on, it will be referred to as the License Manager.



The License Service needs to be installed on your server, and the License Manager can be installed on one or more machines with connectivity to the server.

To access the help, click the **Help** icon (\odot) in the top right of the screen.

Click the topics below to learn more:

- Connecting to the License Service
- Current Users tab
- Licenses tab
- Software tab
- About tab
- Activating / deactivating network licenses

Connecting to the License Service

The License Service manages your network licenses. You need to connect to it via the License Manager to activate or deactivate any licenses.

To connect to the License Service:

Launch the License Manager application.

In the Server Name field, type the server name (or IP address) for the location where you installed the License Service.

Click Connect.

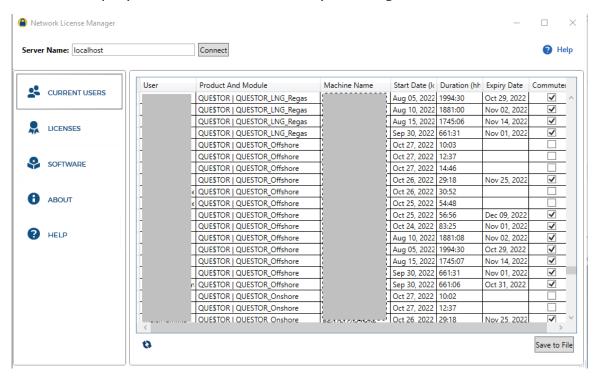
If you want to connect to a different server, click **Disconnect** and then type the new server name (or IP address).

If the License Manager is on the same machine as the License Service, set the Server Name to **localhost**.



Current Users tab

This tab displays a list of users currently running S&P Global software.



Columns are defined as follows:

User — Windows login name.

Product and Module — the software application being used and the module in use. If more than one module is in use at the same time, there is a separate row for each.

Machine Name — the Windows name for the machine running the module.

Start Date — the date when the user started running the current instance of the module.

Expiry Date — this field only applies to commuter licenses, and indicates when the commuter expires. (Commuter licenses enable you to work offline.)

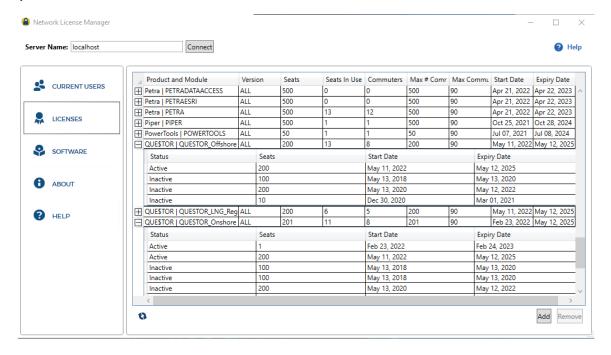
Commuted — indicates whether or not the license is a commuter.

**Refresh Icon — reloads the data in the table. Note that the table automatically refreshes every five minutes, or when a new tab is clicked.

Save to File button — dumps all of the current user data to a .csv file.

Licenses tab

This tab displays all the module licenses that are currently activated on your server.



For each licensed feature, the parent rows in the License tab's table show the aggregation of the active licenses. Child rows display individual licenses, and whether or not they are active.

E	3 F	Harmony RESERVOIR	ALL	6	0	0		6	90		Jan 31, 2018	Apr 04, 2019
	Status		Seats	its			Start Date			Expiry Date		
	Active		1				Apr 01, 2018			Apr 04, 2018		
		Active		5			Jan 31	, 2018		Jan 3	31, 2019	

In the screenshot above, the parent row shows six seats for the Reservoir feature. The child rows display a 5-seat license, as well as a temporary 1-seat license. When the date changes to April 5th, the temporary 1-seat license will become inactive, and the parent row will display five seats.

You can also queue up renewed licenses as soon as you have received your new entitlement email. There is no need to remove your current license, or to wait until your current license expires.

Harmony FORECAST ALL	5	0	0	5	90	Mar 29, 2018	Mar 29, 2019
Status	Seats			Start Date		Expiry Date	
Active				Mar 29, 2018		Mar 29, 2019	
Inactive	5			Mar 29, 2019		Mar 29, 2020	

When the date is March 30, 2019, the first license in the screenshot above will become inactive because it has expired, and the queued-up license will become active and take over. This process is seamless for users occupying seats from the expiring license.

Columns are defined as follows:

Product and Module	Version	Seats	Seats In Use	Commuters In Use	Max # Commuter	Max Commuter Day	Start Date	Expiry Date
	ALL	5	0	0	5	90	Mar 29, 2018	Mar 29, 2019

Product and Module — the module that has the license(s).

Version — the latest supported version for this module. This value may be set to a version number, or the value "ALL", depending on the license type.

Seats — the total number of licensed network seats for this module.

Seats In Use — the number of network seats currently occupied by users.

Commuters In Use — the number of seats currently used as commuters. (Commuter licenses enable you to work offline.)

Max # Commuters — displays the maximum number of seats available as commuters.

Max Commuter Days — the maximum number of days a commuter can be checked out.

Start Date — the start date of your entitlement. This is the first day when you can use a module.

Expiry Date — the end date of your entitlement. This is the last day when you can use a module.

The icon and buttons are defined as follows:

**Refresh Icon — reloads the data in the table. Note that the table automatically refreshes every five minutes, or when a new tab is clicked.

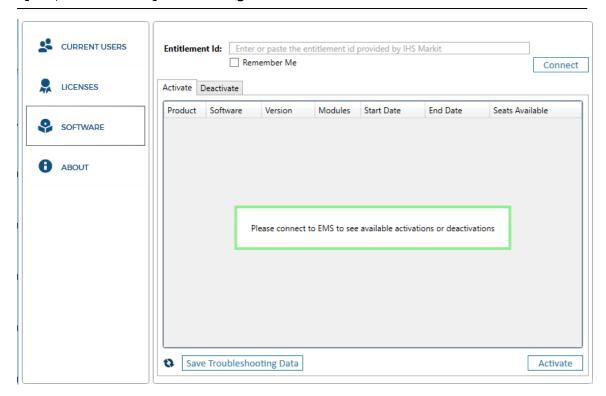
Add — adds a license that has previously been activated. You need to have a Sentinel Entitlement Management System (EMS) license file in order use this feature.

Remove — removes the currently selected module from the table, but does not deactivate the module in the Sentinel EMS. You must select the specific child rows to remove them. You cannot remove a parent row.

Note: Clicking the Remove button does not make the license available for activation on a different server. If you want to do this, you need to go through the deactivation process. For more information, see activating / deactivating network licenses.

Software tab

This tab displays the products you have purchased from S&P Global after you connect to the Entitlement Management System (EMS). Click the **Activate** tab to activate products from the list, and click the **Deactivate** tab to deactivate products from the list. For more information, see activating / deactivating network licenses.



These items are defined as follows:

Entitlement Id — enter the entitlement ID (EID) sent to you via email, and click **Connect**. This enables you to activate licenses or deactivate / move licenses from one machine to another. When connected, you can also view licenses for the EID.

Remember Me — if you click this checkbox, your entitlement ID is saved, so that you can quickly reconnect to the Entitlement Management System (EMS). The EID is automatically saved while the License Manager is open.

Activate tab — lists the products you can activate.

Deactivate tab — lists the products you can deactivate.

 $^{f Q}$ **Refresh** icon — click this icon to refresh the product list in the table.

(Activate tab only) Save Troubleshooting Data button — if you do not see the products you want in the list, Customer Care may ask you to click this button to generate a text file for troubleshooting purposes. If you need assistance, please contact us.

Activate / Deactivate button — click this button to activate or deactivate products.

Columns are defined as follows:

Product — the product name available for use.

Software — the module name available for use. NET = network; SUB = subscription; MAINT = maintenance; PERP = perpetual (version-locked license)

(Deactivate tab only) Activations — the number of times this product has been activated.

(Activate tab only) **Version** — the version of the module associated with this EID. This value may be set to ALL, depending on the license type.

(Activate tab only) **Modules** — the number of modules that are available for use.

(Activate tab only)**Start Date** — the start date of your entitlement. This is the first day when you can use or activate and use a module.

(Activate tab only) **End Date** — the end date of your entitlement. This is the last day when you can use a module.

(Activate tab only) **Seats Available** — the number of network seats available for use.

Note: For each row in the Activate tab, mouse-over text is displayed that identifies the software that is currently selected. For each row in the Deactivate tab, mouse-over text is displayed that identifies the activation date, seats, and modules.

About tab

This tab displays settings for your network licensing system.



Port — this is the port number used to communicate with the License Manager. Make sure this port is open on your network for any machine that needs to request a license from the License Service.

Version — the version of the License Service.

New Code — this is the current hardware footprint for the server running the License Service. This information is required to activate entitlements through the customer portal.

Old Code — this is the old hardware footprint for the server running the License Service, and is displayed for historical purposes.

Application Information — the version of the License Manager application.

Activating / deactivating network licenses

To set up a network licensing system, you need to install the License Service on your server and the License Manager on one or more machines with connectivity to the server.

Activating network licenses

To activate network licenses:

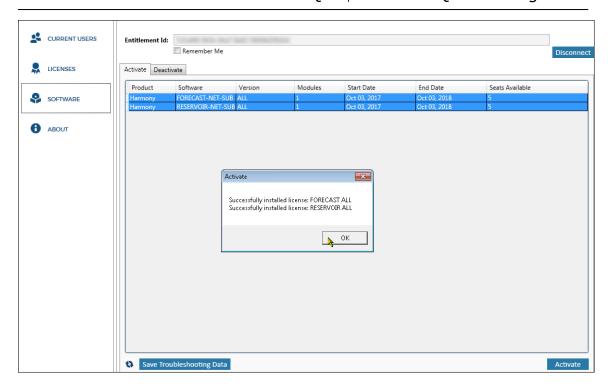
Open your Entitlement Management System (EMS) - Entitlement Certificate email and copy your entitlement ID (EID).

Launch the License Manager and connect to your license server.

Click the **Software** tab (the Activate sub-tab is selected by default) and paste your EID (from the email) in the **Entitlement Id** field; click **Connect**.

Select the products you want to activate and click the **Activate** button.

The new seats are added to your previous total when activating seats for features you have already activated on this server.



Your licenses are now active.

If you want, you can split your entitlements up between multiple servers. This can be useful if you have slow or no network connectivity between offices.

Follow the instructions above for activating network licenses.

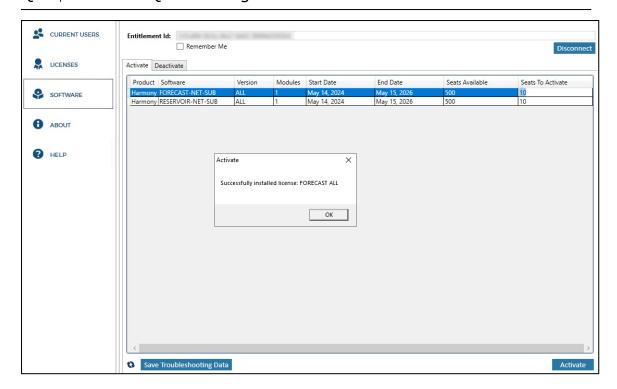
On the Software tab, before clicking activate, you can edit the number of seats value within the 'Seats to Activate' column.

Double click on the number of seats value, input the number of seats to be activated and press Enter.

Then click the Activate button.

The new seats will be added to any existing seats available on the server.

The entitlement will hold the remaining seats to be activated on another server.



Deactivating network licenses

If you want to move your network license from one server to another, you need to first deactivate the license, so that it can be installed on another server.

You can only deactivate a network license if it is not currently in use.

To deactivate a network license:

Open your EMS - Entitlement Certificate email and copy your EID.

Launch the License Manager and connect to your server.

Click the **Software** tab and paste your EID (from the email) in the **Entitlement Id** field; click **Connect**.

Click the **Deactivate** sub-tab, select the products you want to move to a new server, and click the **Deactivate** button. Note that you can only deactivate licenses that have no occupied seats or commuters.

The products are now displayed in the Activate sub-tab and can be activated on a new server.

When the deactivation process completes, a dialog box opens indicating whether the process was successful or not. If the network experiences an interruption during the deactivation, a "Complete Partial Deactivation" button may appear. When the network is restored, clicking this button cleans up any artifacts caused by the interruption, and then the button disappears.

Troubleshooting Errors

- Network licensing 'Error[11]: Error in calling API function.'
- <u>Standalone / Borrowed licensing `Error[26]: Request denied due to clock tampering detection.'</u>
- Standalone licensing 'Error[143]: Failed to activate feature.'
- Network licensing 'Error[188]: License start date not yet reached.'
- <u>`Error [0xc800100d]: QUE\$TOR (Version xx.x) cannot run</u> anymore because the license expiration date has been reached.'
- Network licensing Activate Error: Failed to install: QUE\$TOR, Unexpected response from EMS server. Expected 201, received 400 (Bad Request) Network License Manager version is out of date, please update to latest version.'

Network licensing 'Error[11]: Error in calling API function.'

This error indicates that you do not have the access rights on your computer to modify the file containing the license details.

The 'lservrc.cfg' file is used to save the details of the license server. The file is located in the <ProgramData>\IHS Markit folder, (typically 'C:\ProgramData\IHS Markit'). This is a plain text file and it needs to contain the following text:

[QUESTOR]

LICENSE_SERVER=<QUE\$TORLicenseServer>

where <QUE\$TORLicenseServer> is the name of the license server.

Someone with sufficient access rights on the computer is needed to edit the file. You can edit this file manually, e.g. in Notepad, or use the SetRmsLicense.exe application. You can run this application from the QUE\$TOR installation folder (typically 'C:\Program Files (x86)\SPGlobal\QUE\$TOR xx.x') or from QUE\$TOR when you open the Find License window.

Standalone / Borrowed licensing 'Error [26]: Request denied due to clock tampering detection.'

This error suggests that the licensing system was not initialized properly setting up the program.

Resolve this error by running the file 'lsinit.exe' on the installation computer as an administrator. You can find the file in the 'Support\Licence' subfolder of the QUE\$TOR installation folder, (typically 'C:\Program Files (x86)\SPGlobal\QUE\$TOR xx.x\Support\License'). This executable does not indicate whether it ran successfully or not, so try obtaining a license again after you run it by running QUE\$TOR and creating a new project.

Standalone licensing 'Error [143]: Failed to activate feature.'

This error likely indicates that you do not have the access rights on your computer to modify the file that stores the license details.

Resolve this error by obtaining write access to <ProgramData>\IHS Markit, (typically `C:\ProgramData\IHS Markit').

Network licensing 'Error [188]: License start date not yet reached.'

This error indicates that your licenses have been activated before the start date, but it can also occur in some cases after the start date has passed.

If the start date has not passed you will need to wait for the start date or contact customer care for an updated license.

If the start date has passed, in most cases you can resolve the issue by deactivating the licenses and then reactivating them.

'Error[0xc800100d]: QUE\$TOR (Version xx.x) cannot run anymore because the license expiration date has been reached.'

This error can occur when recently installed expired licenses are blocking valid licenses.

Resolve this error by deactivating any expired licenses. It may also help to deactivate and reactivate any valid licenses.

Network licensing 'Activate Error: Failed to install: QUE\$TOR, Unexpected response from EMS server. Expected 201, received 400 (Bad Request) Network License Manager version is out of date, please update to latest version.'

This error is caused due to an out of date version of the Network License Manager.

Resolve this error by downloading the latest version of the Network License Manager tool from the QUE\$TOR Software Resources page.

You can also download it from the EMS Customer Portal by logging in using your Entitlement ID (EID). You can find detailed instructions on how to access the <u>EMS Customer portal</u> in the <u>Downloading Network Licensing Tool</u> section of the Licensing guide.

QUE\$TOR Software Resources

https://www.spglobal.com/commodityinsights/en/ci/Info/0316/quest or-software-resources.html

EMS Customer Portal

https://softwarelicensing.ci.spglobal.com/ems/customerLogin.html

Contacting customer support

Requests for support related to the QUE\$TOR application should be directed to ci.support@spglobal.com.

Requests can also be submitted through our website.

Or by phone

Americas: +1 800 447 2273

Europe, Middle East and Africa: +44 (0) 1344 328 300

Asia Pacific: +604 291 3600

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