

The Software Administrator's Guide to Autodesk Subscriptions

How to Set Up, Install, and Manage Your Software and Users









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WELCOME

This eBook is your quick start guide to getting up and running with your subscription. It includes an overview of the setup process, helpful tips and detailed step-by-step instructions when and where you may need them.

Is this eBook for you?

This eBook is for **Contract Managers** and **Software Coordinators** who **have subscribed to Autodesk** products and services and are looking for an easy and efficient way to get their teams set up and working productively with their software.

How do I navigate this eBook?

There are several ways to easily navigate this eBook:

- Use the PDF scroll bar.
- Use your keyboard arrows.
- Click on the "PREVIOUS" and "NEXT" links at the bottom of each page. -

• Click on the topic you want to explore from the detailed navigation bar on the left side of each page.



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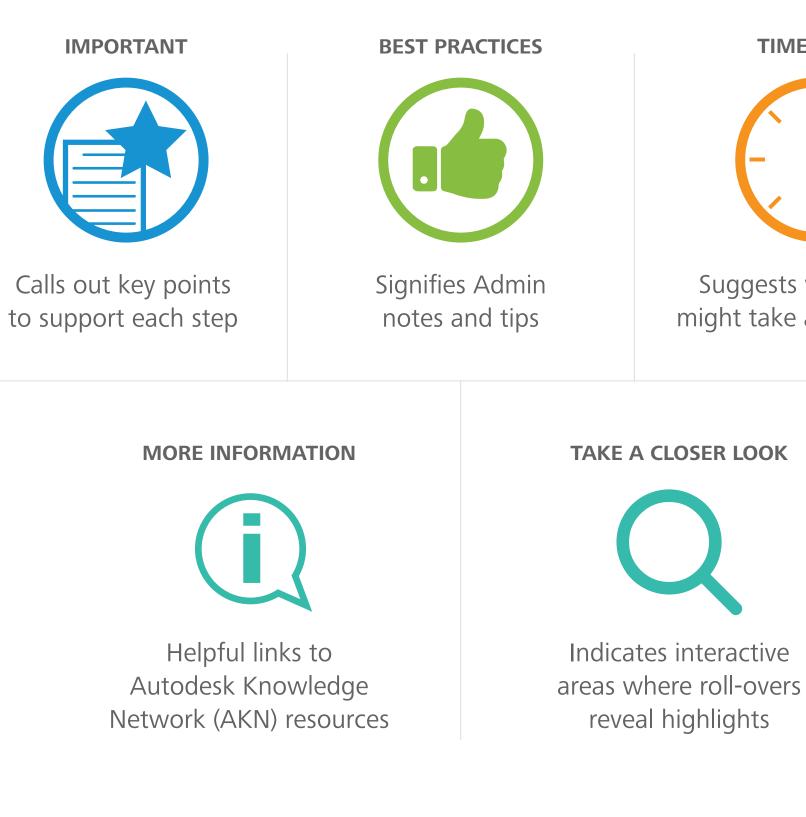
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Visual Cues

Look for the following visual cues throughout this eBook:



Links to areas WITHIN this eBook will appear like this \bigcirc .

Links to information in places OUTSIDE of this eBook will appear like this 2.

TIME ALERT



Suggests where a step might take additional time

Quick Links

The following quick links take you to key setup procedures, how-to sections and helpful tips in this guide.

- Top 5 Things You Should Know about <u>Subscription Setup</u>
- Setup Process Overview
- Understanding the <u>Contract Manager</u> S Role
- Setting Up Users (2)
- <u>Setting Up Named Callers</u>
- Best Practices 🛇

For a comprehensive list of topics covered in this guide, see the **Table of Contents (**).



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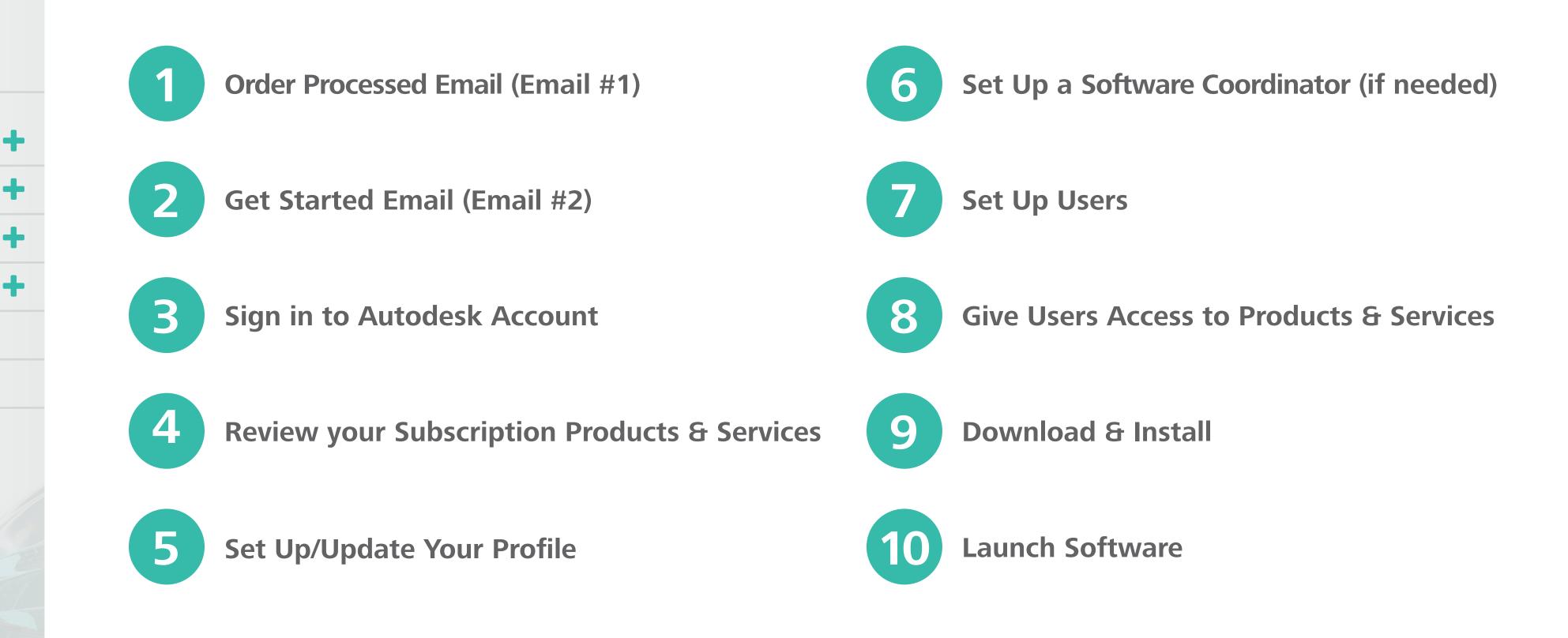
Top 5 Things You Should Know about Subscription Setup

Best Practices for Managing Your Subscription

- Before You Start: Get Ready for Setup +
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- FAQ
- **Additional Resources**

Setup Process Overview

This guide walks you through the 10 steps of setup and installation, from the time your subscription order is processed to successful software launch. For best results, review the **Before You Start (** section, then complete the steps in the order listed in the Setup and Installation section.





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Top 5 Things You Should Know **About Subscription Setup**

1. There are four subscription roles.

Four roles can be assigned to each subscription contract: **Contract Manager, Software Coordinator, User** (or Named User), and Named Caller (for Advanced Support only).

Each subscription contract can have one **Contract** Manager and one Software Coordinator per serial number or group of products, and as many **Users** and **Named Callers** (if Advanced Support is purchased) as your license supports. If you have multiple products on your contract, you can have multiple **Software Coordinators**. Learn more about roles **O**

2. Subscription setup begins with the Contract Manager.

If you subscribed under your name and/or credit card or using your User ID, you are the official **Contract Manager**. Learn how to change this in the FAQ section **O**

3. There is a process to naming users.

Users must **first be added** by a Contract Manager or Software Coordinator via Autodesk Account to then have permissions assigned to them in order to access and use subscription products and services. This process is called **Naming Users**.

Users must be named **BEFORE** you can assign them access to products and services. Learn how to set up Users 🕄

4. There is a process to naming callers.

Callers must also be **NAMED** to use the Advanced Support phone benefit. Learn how to name callers 🕄

5. It is important to check system requirements.

One of the **most important steps** in the product installation process is checking the system requirements to make sure a system is optimized **BEFORE** downloading and installing the products. **Completing this step FIRST** will ensure a smoother setup and better ultimate experience for the user. Learn more 📀





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Best Practices for Subscription Setup and Management

✓ Understand the role of the Contract Manager.

The Contract Manager is the **main point of contact and administrator** on an Autodesk subscription contract. This role is automatically assigned to the individual whose User ID was used to subscribe.

In some cases, a Contract Manager can be changed (See how 2). However, Contract Managers on auto-renewal contracts *cannot* be changed. Contracts must lapse and new contracts must be purchased to completely change a Contract Manager.

✓ Be organized.

Have your Contract Manager and Software Coordinator meet with each other and with the team(s) to identify roles and determine who needs access to what products, services and benefits. Gather all user information (names, existing User IDs and associated email addresses) so it is documented and available when you need it for **User Setup** and beyond.

✓ Keep information current.

Contract Managers and Software Coordinators should always be sure their Autodesk Account profile, contact information and email address are up to date so they always receive notifications, confirmations and critical product information.

✓ Be known as an Admin.

If you are the Contract Manager or Software Coordinator, **make sure** your team of users is aware of your role so they know who to come to if they need support, have questions or run into challenges.

Establish protocols.

We recommend that Contract Managers and Software Coordinators establish internal protocols and processes around user(s) or role(s) change requests, including removing users that are no longer affiliated with the company. You might also establish product protocols to set standards around download and installation processes, as well as updates, features and fixes to keep user software up to date.

✓ Be proactive with auto-renew.

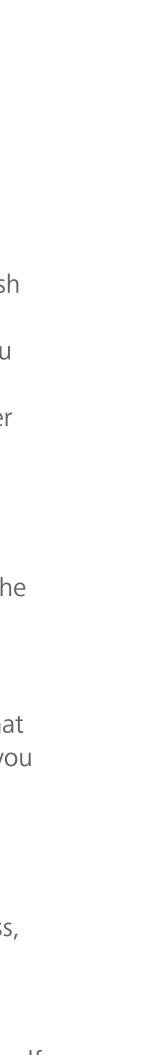
Renew your subscription contract **BEFORE the expiration date** to avoid losing access to your software and incurring potential late fees. Make sure the associated credit card information is kept up to date.

✓ Validate system requirements before installation.

Be sure to check what an application needs for optimal performance and that the target system can support the install and product experience **BEFORE** you install the product.

✓ Know your Autodesk Account.

Explore the Admin areas now so you can quickly find what you need when you need it. Get to know the key areas that pertain to user roles, user access, support and contract details. The management screens offer many nested details and cross-referenced information. You will find that there are several ways to get to the screens you need. Hover over the "i" icons for more information. Take full advantage of the integrated Support for self-help and selfpaced learning opportunities through the Autodesk Knowledge Network (AKN).





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BEFORE YOU START: GET READY FOR SETUP

This section describes subscription roles and capabilities, lists the information you need before you set up your software, and explains the importance of the User ID. With a little up-front planning, you can significantly streamline your setup process.







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Understanding Subscription Roles and Capabilities

Four key roles can be connected to each subscription: **Contract Manager, Software Coordinator, User,** and **Named Caller**. Each role has distinct functions and capabilities.

CONTRACT MANAGER (CM)

SOFTWARE COORDINATOR (SC)

USER (U) (OR "NAMED USER")



NAMED CALLER (NC)





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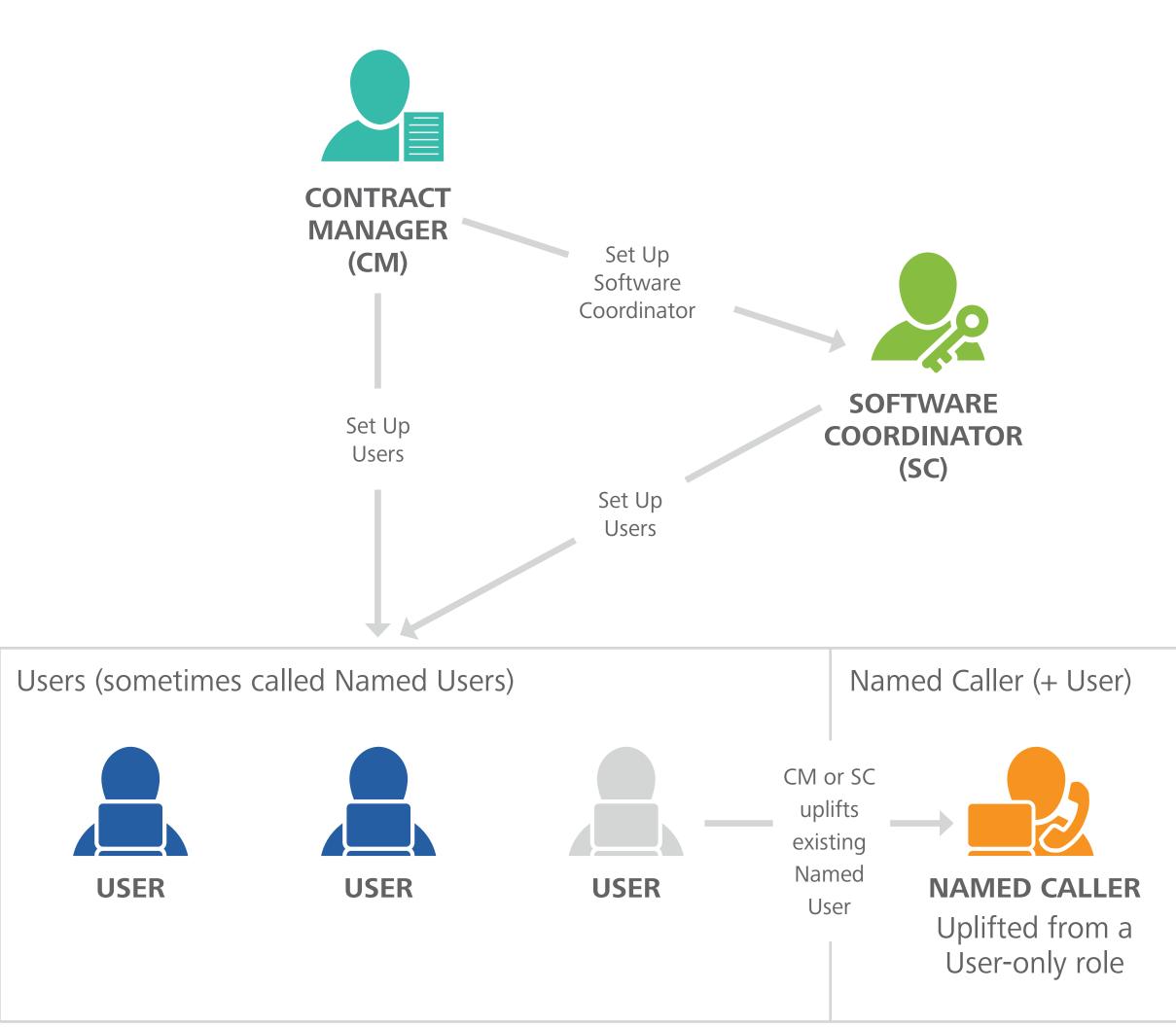
Role Summary

When a new subscription begins, only the Contract Manager role exists. By default, the Contract Manager is also the User and a Named Caller (if applicable based on the level of support attached to your subscription).

If a Software Coordinator is not assigned by the Contract Manager, the Software Coordinator role capabilities default to the Contract Manager. Only the Contract Manager can assign a Software Coordinator. By default, an assigned Software Coordinator will also be a User and a Named Caller.

If either the Contract Manager or the Software Coordinator do not plan to use any of the products or services assigned by default, such benefits should be removed from them so the benefits may be assigned to other Users. This is done through the User Management section of either Admin's Autodesk Account. Learn more <>

Both the Contract Manager and the Software Coordinator can set up and manage Users, as well as assign and remove access to products and services.









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Roles and Capabilities Matrix

The following matrix gives you a high-level summary of the origin and capabilities of each of the four key roles.

ROLE ORIGIN *How does each role come to be?*

CAPABILITY

Subscribes to products and services

Main point of contact for your Autodesk subscription con

Receives Order Processed email (email #1)

Receives Get Started email (email #2)

Manages contract(s) and renewal terms

Receives renewal notices

Assigns Software Coordinators

Sets Up/Manages Users; assigns User access to products, and support

Receives email notifications to download new releases or upgrades of Autodesk products

Manages personal profile

Downloads and installs products

Accesses serial numbers & product keys

Downloads product enhancements and updates

Submits/Views web support cases

Designates Named Callers***

Accesses phone support (with Advanced Support)***

*Users must first be granted privileges by CM or SC before they can download products, product enhancements and upgrades, or access web support. **Available to Users with products that require it. ***Named Callers are only available with Advanced Support.

	CONTRACT MANAGER (CM) ADMIN ROLE	SOFTWARE COORDINATOR (SC) ADMIN ROLE	USER (U) ALSO CALLED A "NAMED USER"	NAMED CALLER MUST FIRST BE NAMED A USER
	Subscriber (purchaser of the subscription)	If not assigned, capabilities default to CM	Added by CM or SC	Default for CM and SC or User elevated by CM
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Subscription Role Scenarios

As you have seen in the previous section, there are multiple roles available to help you manage your subscription contracts and user needs. Larger companies may assign roles to more people while roles in smaller teams and individuals may overlap.

MPORTANT It is best to identify your team's needs and roles before you set up your subscription.

Subscription scenarios to demonstrate how roles might be assigned:

Smith Architecture is a 10-person company. They have 2 purchasing agents, 1 IT Manager and 3 Autodesk users. Smith purchased a subscription with multi-user access to the Autodesk product of their choice and Advanced Support.

- **Contract Manager** = Purchasing Agent/Subscriber
- **Software Coordinator** = IT Manager, to help implement subscription installation and support needs
- Users = 3 employees that will access the software and benefits. Each needs to be named (added and set up) before they can launch or access the software, and access the other benefits.
- Named Callers = 3 total. Contract Manager/Purchasing Agent (by default), Software Coordinator/ IT Manager (by default) and one of the Users (as defined by IT Manager/Software Coordinator)



BEST PRACTICE Contract Managers and Software Coordinators should meet with their teams PRIOR to subscription **setup.** This way Admins can identify who needs access to the products, services and benefits. Be sure to collect all necessary user information so it is readily available for user setup, as noted in the next section.

Jones Consulting is a one-person company. Jones purchased a subscription with single-user access to the Autodesk product of their choice.

- Alex Jones is the **Contract Manager** and User (by default)
- No **Software Coordinator** is needed in this one-person scenario. The SC role's capabilities default to the CM
- No Named Caller is available with Basic Support











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Prepare for Setup Success

As Contract Manager, you can maximize the efficiency of your setup process by identifying your **team roles** and following the preparatory steps below. Carefully review this section to make your setup process go as smoothly as possible.

1. Query Your Users

Before you begin setup, **ask each person** that will be associated with this subscription in any role (even new users) the following critical question:

Do you have an existing Autodesk account?

- If YES, collect that user's EXISTING credentials (listed in next section) to ensure that you are connecting to the correct User ID within the setup process. Tell them that they will receive Get Started and Permissions Changed emails with their sign in credentials when their benefits are ready.
- If NO, collect that user's information (listed in next section) and enter it into the Add User form (Step 7) when you set them up. This will automatically create a linked User ID for them. Tell them NOT to set up their own account while this process is taking place. They should WAIT to receive their Get Started email with their sign in credentials. The Get Started and Permissions Changed emails will indicate that their benefits are ready.

2. Collect User Information

Next, gather the following information for all users:

- ✓ First name
- Last name
- Email address that is associated with OR that they want associated with their User ID
- ✓ User ID if they have an existing Autodesk account (this may be the same as their email)



IMPORTANT

User IDs must be correct for users to be accurately set up and connected to subscription benefits. If you enter user information that does not match an existing User ID record, a new User ID will be created.

If users have multiple User IDs, it is important that you **connect to the correct/preferred** one as subscription benefits will soon be connected to their ID's profile information.

Learn more about Setting Up New User IDs 🕄





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Setting Up New User IDs

The process of Setting Up Users (Step 7) automatically creates a linked User ID for any new users.

New users should NOT go to Autodesk Account and create a potentially additional User ID while the setup process is happening. Duplicate accounts can hinder access and delay their onboarding process.

New users should let the Contract Manager or Software Coordinator create it for them. Remind new users to wait for their Get Started email and use the provided sign in credentials to sign in to the connected account.

User ID vs. Autodesk Account – Definitions

USER ID

Your User ID is your single sign-in that enables you to use the same ID and password to access multiple Autodesk websites. Your User ID is typically your email address, but it can also be an alpha-numerical ID you create.

When you subscribe through the Online Store, we'll help you create an User ID if you don't already have one. This sign in information gives you access to download software and manage your products and services.

AUTODESK ACCOUNT

This is your account portal at **accounts.autodesk.com** where you can manage user access to software and services, subscription contract renewal, and cloud credits.



IMPORTANT

The User ID is THE identifier for you and each person on your team. The User ID is also the user's single sign-in credential across all key Autodesk digital properties.

We typically recommend that you make your ID the same as your email address but it can also be an alpha-numerical ID you create.

BEST PRACTICE

Admins and users should check with each other before setting up any new User IDs. It is best to simply set up all new User IDs through the simple integrated process within the Setting Up Users step (Step 7).







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- STEP 9: Download & Install Products

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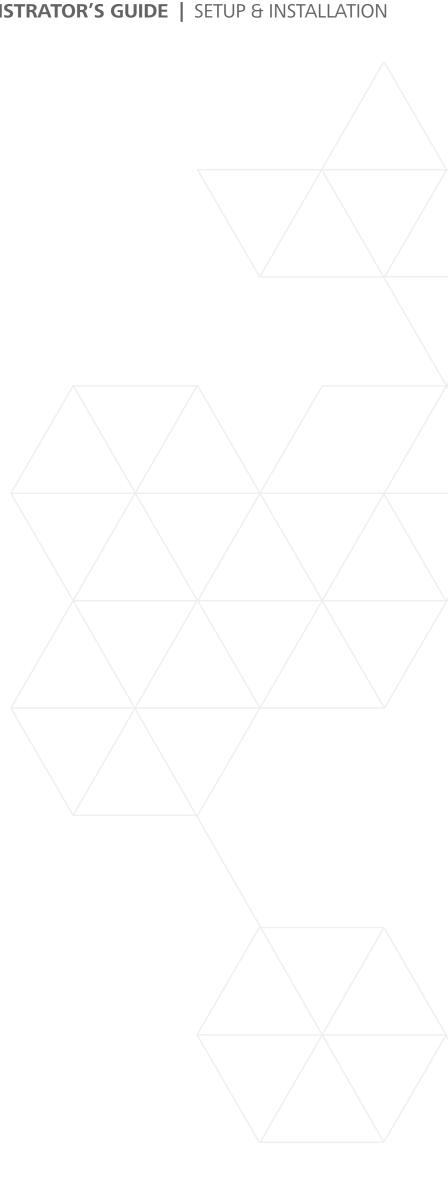
Ready to Set Up and Install your Subscription?

time your subscription order is processed to software launch.

ways to achieve successful setup and installation.

Before you begin, be sure to understand and define your **<u>subscription roles</u>** and **gather what you need** S for the proper setup.

- This section divides the setup and installation process into 10 distinct steps, from the
- Best practices and important notes appear throughout the steps, showing you effective







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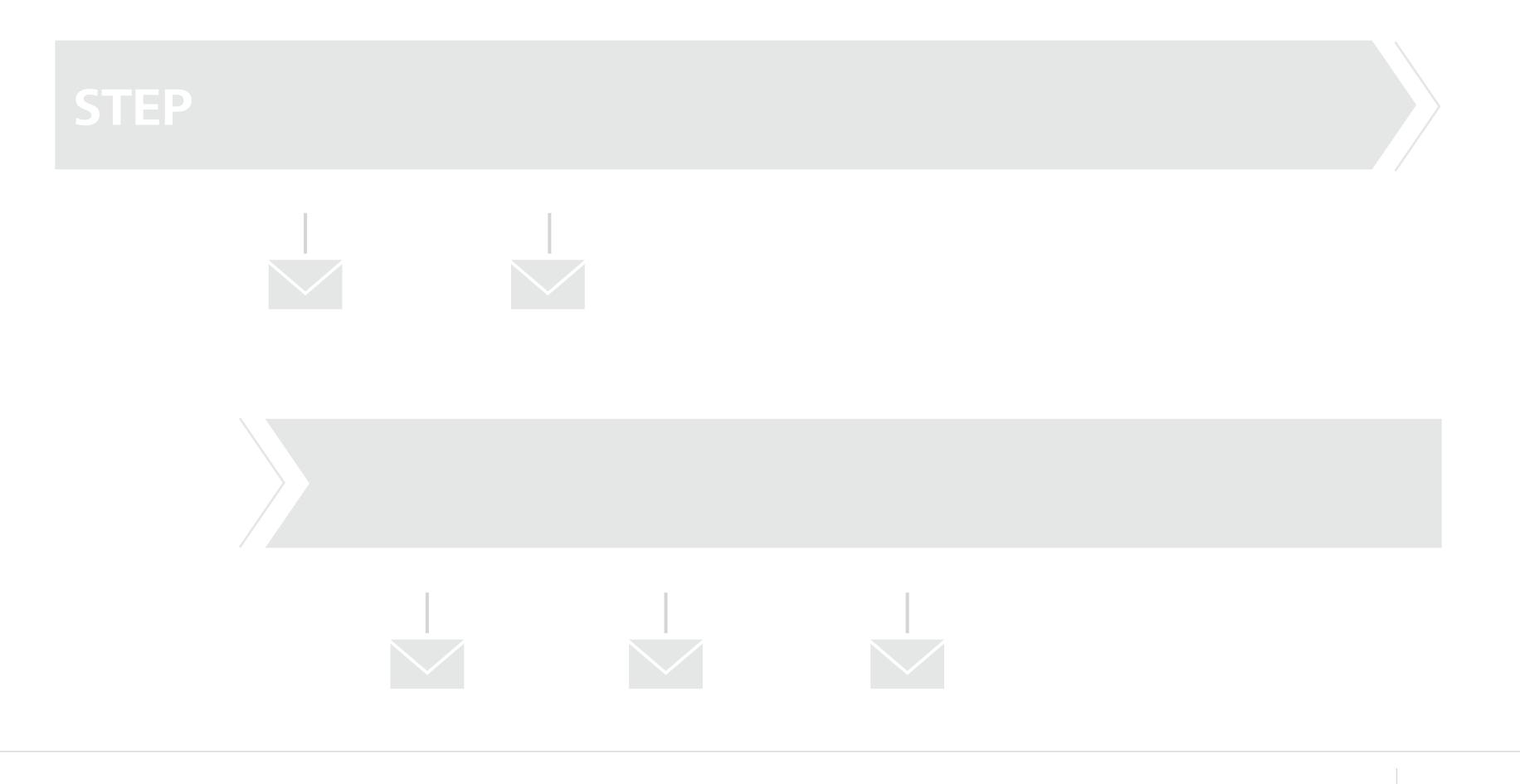
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Setup Process

move to the next.



The setup and installation process can be broken down into 10 steps, as shown below. Simply follow the step-by-step directions (and screen references) to complete one step successfully before you







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Order Processed Email (EMAIL #1)

Before the Contract Manager can provide access for others to the purchased products and services, a subscription must be ordered and processed. Once the order is processed, Autodesk will send the Contract Manager an email confirmation. Please file the Order Processed email for future reference. This guide assumes that you have already made such a purchase and have received an email receipt.

Who is the Contract Manager?

The person with the User ID or email address used to subscribe will, by default, be set up as the Contract Manager. The Contract Manager will have full administrative access and permissions for the account. Learn more in Understanding Subscription Roles and Capabilities O

🔼 AUTODESK. Your Autodesk order has been processed Dear Thank you for choosing Autodesk. If you are a new customer, you will be provided with the information necessary to login to your account shortly. Returning customers get instant access by signing in to Autodesk Account. Order Number: Sold To Partner Purchase Order #: EXEC ORDER -Dealer PO # / Customer PO #: N/A Subscription Contract #: AutoCAD LT 2016 Non-Language Specific Commercial Product Desktop Sub New 3-Year Windows Standalone Serial # / Produ 558-Online download Autodesk CFD Flex 2016 Non-Language Specific Commercial Product Desktop Sub New 3-Year Windows Standalone Serial # / 558-Qtv: 5 Online download Simulation Mechanical Flex 2016 Non-Language Specific Commercial Serial # / Produ Product Desktop Sub New 3-Year Windows Standalone 558-Qty: 5 Online downloa Autodesk Fusion 360 Ultimate CLOUD Non Specific Commercial Product Serial # / Product Key Desktop Sub New 3-Year Windows Standalone Qty: 5 Online download Product Design Suite Ultimate 2016 Non-Language Specific Commercial Serial # / Product Key: Product Desktop Sub New 3-Year Windows Standalone 558-Qty: 5 Online download

For new licenses we've attached your License Certificate in PDF format. We recommend that you keep it and

this email for your rec



IMPORTANT THIS EMAIL IS ONLY A RECEIPT. YOUR SUBSCRIPTION MAY NOT **BE READY.**

Email #1 lets you know that your order has been processed. This does NOT mean your subscription is ready.

Upon successfully subscribing (through an authorized Autodesk reseller, the Online Store or Amazon), you (the Contract Manager) should have received an email saying that your order has been processed at the email address provided during the subscribing process. This email may look slightly different depending on origin.

While this email references and has links to Autodesk Account sign in, it DOES NOT mean that your subscription is ready for use. You must wait for the Get Started email (Step 2).



IMPORTANT

For new subscribers – please wait for your sign in credentials before you proceed. Do NOT create a new account. Your new connected Autodesk Account credentials will be included in your Get Started email (Step 2).



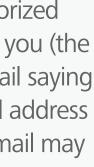
TIME ALERT

For new subscribers, your new Autodesk Account will also be automatically processed as part of your order so you will need to be a bit more patient. You should receive a second email "Get Started" (see Step 2) within 12-24 hours. This email will contain your User ID and temporary password.

For current subscribers, there can be a slight processing delay between your subscription order and when the benefits appear in your Autodesk Account.

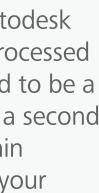
















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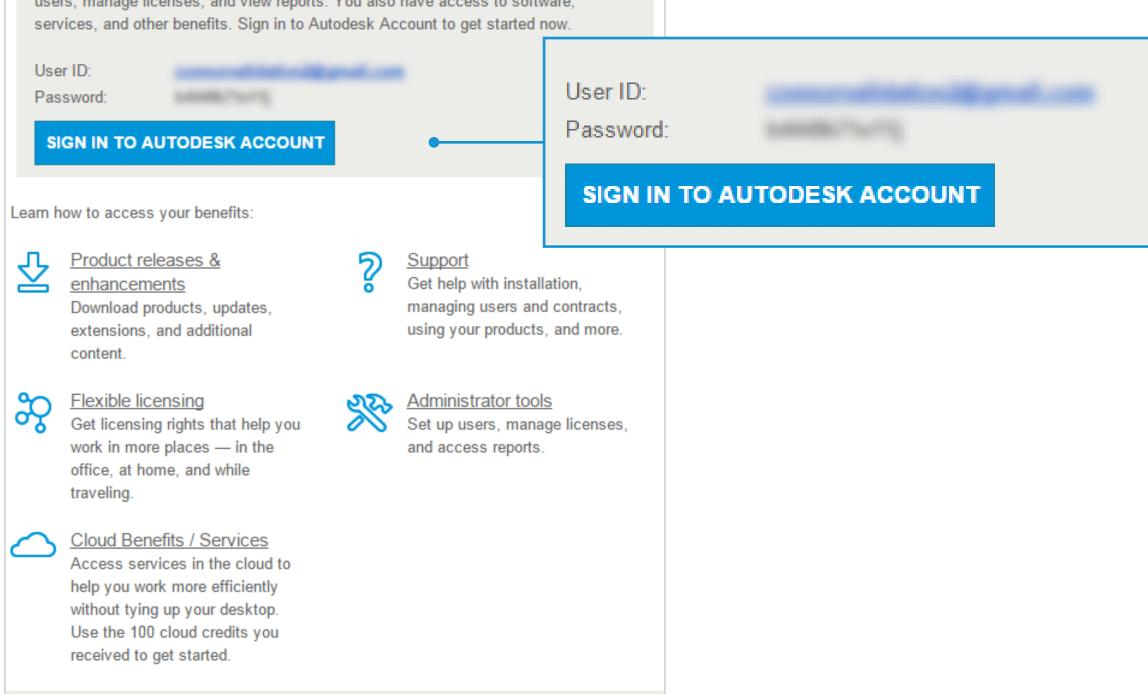
Get Started Email (EMAIL #2)

The second main email that will arrive in your inbox is the Get Started email. This may be called different things, such as Welcome, depending where you subscribed.

Thank you for choosing Autodesk

Hello

As an Account Administrator for your organization, you have the ability to set up users, manage licenses, and view reports. You also have access to software,



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The Get Started email signifies that your subscription benefits are ready.

If you were an existing Autodesk User, your message will reference your current User ID and a link to access your account.

If you are a new subscriber, your email will include your new User ID, a temporary password, and a link to access the account.

To access the benefits, sign in to Autodesk Account with the Access Account button.



IMPORTANT

If you do not receive the second email within 12-24 hours, contact Autodesk.

If you are an Admin and have successfully signed into Autodesk Account, please sign in and submit a direct support case on the user's behalf through the top navigation Support menu on the top right of your Autodesk Account (Support > View Cases > Submit a Case). Learn how to submit a support case **O**

Otherwise, please do the following:

- Go to Autodesk Knowledge Network
- Select the "Account Creation & Sign In" icon
- Click the "Signing into an account" button
- Choose to contact us via one of the available options displayed after you sign in (e.g., chat, submit a request, schedule a call, etc.).























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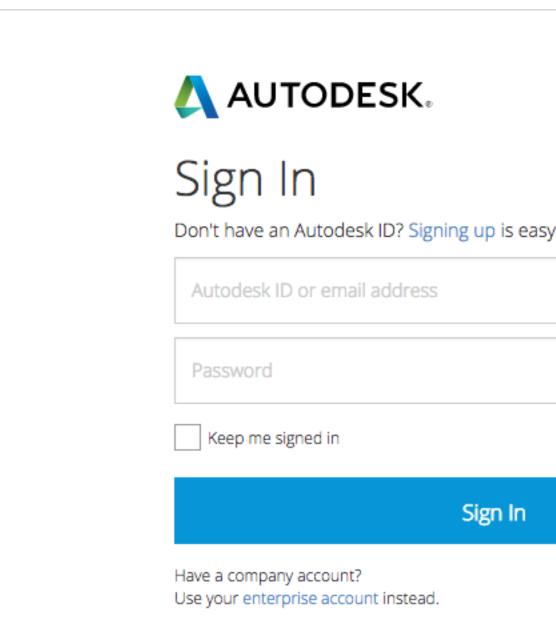
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STEP 3

Sign In to Autodesk Account

Access from your Get Started Email

When you sign in to your **Autodesk Account** to view your new products and services, be sure you are doing it at the right time. If you are a new user, wait until you receive your Get Started email before signing in to Autodesk Account. This will ensure that you are using the User ID associated with the new subscription order. Do not create a new account here.



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BEST PRACTICE

Wait until you receive your Get **Started email (Step 2) and then click** Access Account from within the email. This will ensure you are using the User ID associated with the new products and services.

UPON SIGN IN:

New users will be asked to change their temporary passwords. All users may be asked to accept Subscriber Terms and Conditions.

Once this is done, you will be directed to the Products & Services page by default.











Before You Start: Get Ready for Setup +

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→ Setup & Installation

Setup Process

- STEP 1: Order Processed Email (Email #1)
- STEP 2: Get Started Email (Email #2)

STEP 3: Sign In to Autodesk Account

- STEP 4: Review your Subscription Products & Services
- STEP 5: Set Up/Update Your Profile
- STEP 6: Set Up a Software Coordinator (if needed)
- STEP 7: Set Up Users
- STEP 8: Give Users Access to Products and Services
- STEP 9: Download & Install Products
- STEP 10: Launch Software

Support

Ongoing Management 🕂

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STEP 3

Sign In to Autodesk Account

Get to Know the Autodesk Account Interface

Take a moment to orient yourself to the key navigation and elements of the Autodesk Account interface.

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	Give feedback Give us your feedback and				2015 Downloads	
	sign up for our user studies as we continue to improve your experience!				2014 Downloads	
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KEY AREAS AND ELEMENTS:

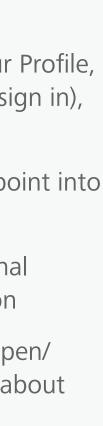
TOP NAVIGATION – includes access to your Profile, Management (the default screen when you sign in), and Support

LEFT NAVIGATION (SIDE) – your starting point into main Management menus

QUICK LINKS – gives you access to additional content, depending on what page you are on

DRAWERS – small toggle arrows that will open/ expand to reveal more detailed information about any item

"i" ICON – click the "i" for additional helpful information







Before You Start: Get Ready for Setup ╋

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→ Setup & Installation

Setup Process

STEP 1: Order Processed Email (Email #1)

STEP 2: Get Started Email (Email #2)

STEP 3: Sign In to Autodesk Account

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- STEP 7: Set Up Users
- STEP 8: Give Users Access to **Products and Services**
- STEP 9: Download & Install Products
- STEP 10: Launch Software

Support

Ongoing Management 🕂

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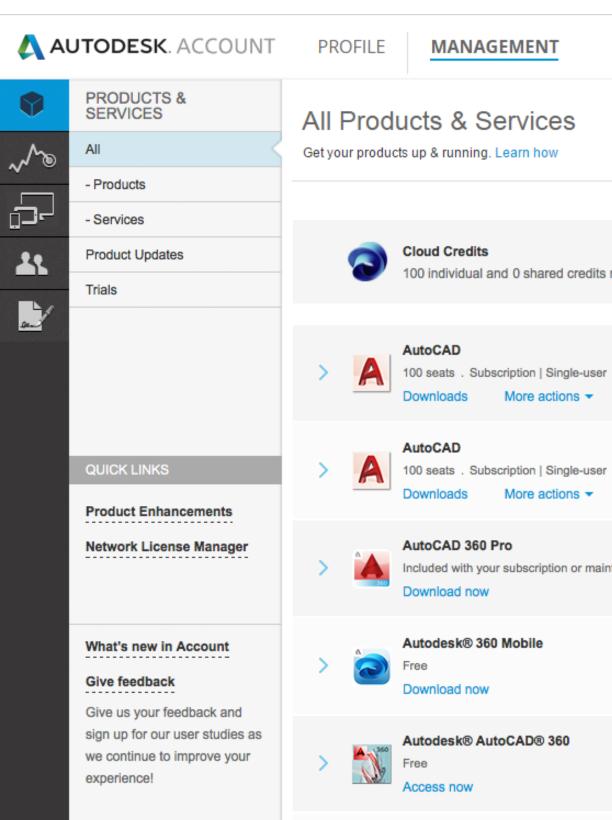
Additional Resources

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STEP 3

Sign In to Autodesk Account

Get to Know the Autodesk Account Interface



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LEFT NAVIGATION

PRODUCTS AND SERVICES – default screen for Management section where you access All Products and Services, Product Updates and Trials

REPORTING – View reports for Cloud Service Usage here

DEVICES – Manage and export connected device information where subscription benefits are loaded

USERS – Add/Manage Users and Manage Phone Support (Quick Links), Filter user information, edit access and export user information as CSV and XLS files here

BILLING & ORDERS – provides a detailed view of your subscription (or maintenance plan) contract including:

- Number and name of products associated with the contract
- Number of seats by product
- Support level
- Subscription term, and start and end dates
- Cloud Credit usage
- Other details

Associated Products & Services can be expanded for additional details or exported as a CSV file.









Before You Start: Get Ready for Setup ╋

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→ Setup & Installation

Setup Process

- STEP 1: Order Processed Email (Email #1)
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- STEP 10: Launch Software

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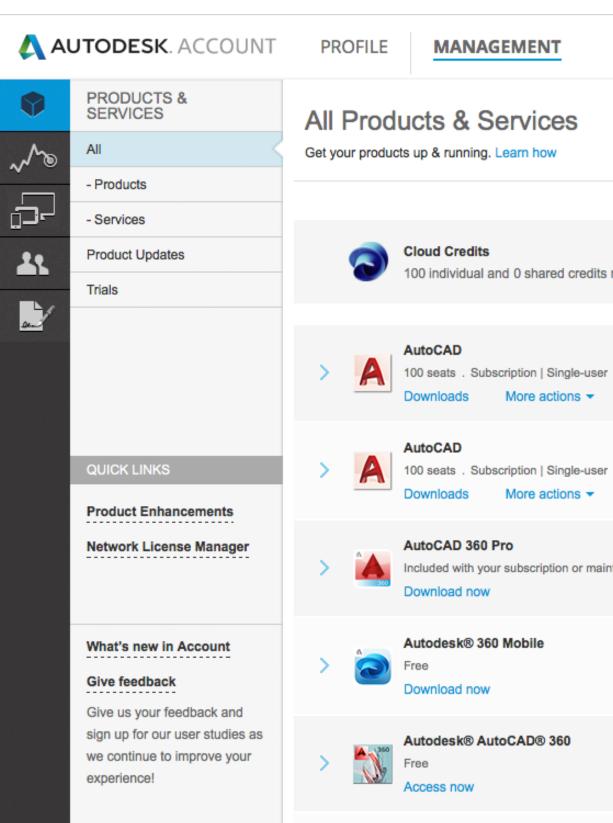
Additional Resources

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STEP 3

Sign In to Autodesk Account

Get to Know the Autodesk Account Interface



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SUPPORT MENU:

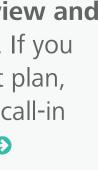
BROWSE SUPPORT & LEARNING – this gives you access to self-help articles and information organized by products, suites and cloud services as well as access to forums

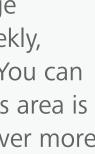
VIEW MY SUPPORT CASES – where you **view and** submit your one-to-one web support cases. If you are a Named Caller on an Advanced Support plan, this is also where you can find your support call-in number. See more in the **Support Section (**

CONTACT US – this launches a support page featuring top support solutions, curated weekly, enabling you to quickly resolve your issues. You can access one-to-one support options here. This area is constantly evolving and will continue to deliver more features











Before You Start: Get Ready for Setup

→ Setup & Installation

Setup Process

- STEP 1: Order Processed Email (Email #1)
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STEP 4: Review your Subscription Products & Services

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- STEP 8: Give Users Access to **Products and Services**
- STEP 9: Download & Install Products
- STEP 10: Launch Software

Support

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Additional Resources

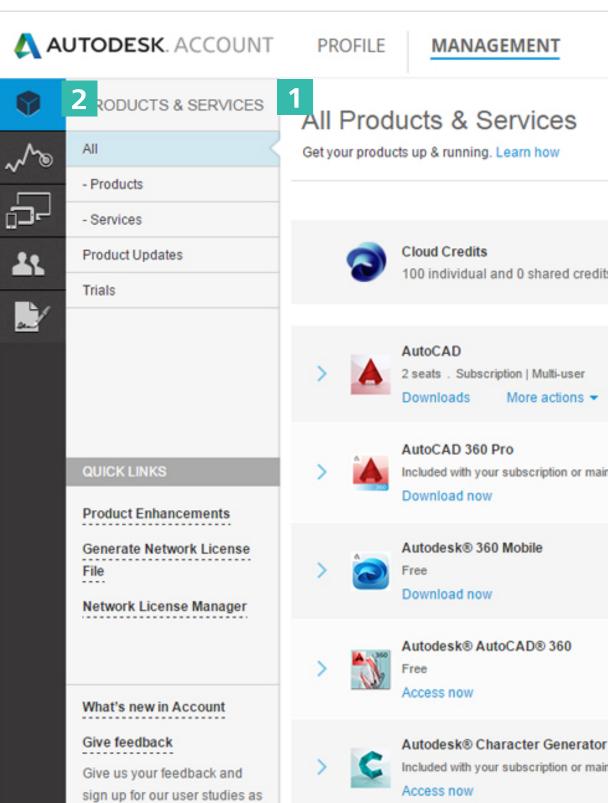
STEP 4

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Review Your Subscription Products & Services

Upon sign in, you will land in the Products & Services page. Here you will see the overview of all Products & Services connected to your Autodesk Account.



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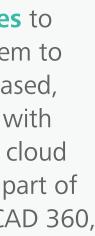
1. Take a look at your products & services to

confirm that they are what you expect them to be. You will see the product you've purchased, number of seats, cloud credits that come with your subscription, renewal terms and any cloud credits and entitled web services that are part of your subscription (e.g. 360 mobile, AutoCAD 360, Remote, Photo to 3D, etc.).

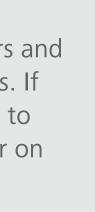
If you see "Expires" it simply means this product will expire but not necessarily soon. Open the drawer for each product or service to see more details.

NOTE: Action buttons will be visible to all Contract Managers, Software Coordinators and Users that have been assigned permissions. If an Admin has not given a user permission to download a product, it won't even appear on the main landing page.

2. Filter the list down to just products or services by clicking in the left inset navigation.











Before You Start: Get Ready for Setup +

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→ Setup & Installation

Setup Process

- STEP 1: Order Processed Email (Email #1)
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Ongoing Management 🕂

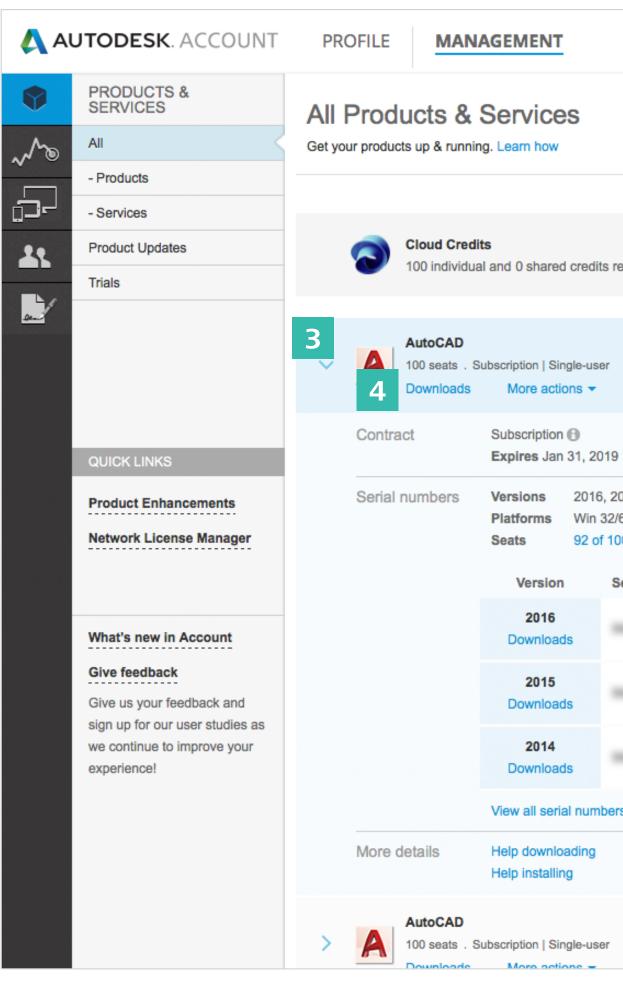
FAQ

Additional Resources

CONTINUED

STEP 4

Review Your Subscription Products & Services



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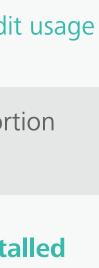
- **3. Expand the drawer** (arrow toggle) for each product name or service to get more details and information including:
 - a. Contract information
 - b. Serial numbers
 - c. Product keys
 - d. Number of seats available
 - e. All contract details as well as cloud credit usage

NOTE: Non-Admin users will see only a portion of this information in their drawers.

4. Products can also be downloaded/installed from this page. It is recommended that you do this step AFTER User Setup (Step 7) S.











Before You Start: Get Ready for Setup ╋

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→ Setup & Installation

Setup Process

- STEP 1: Order Processed Email (Email #1)
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Ongoing Management 🕂

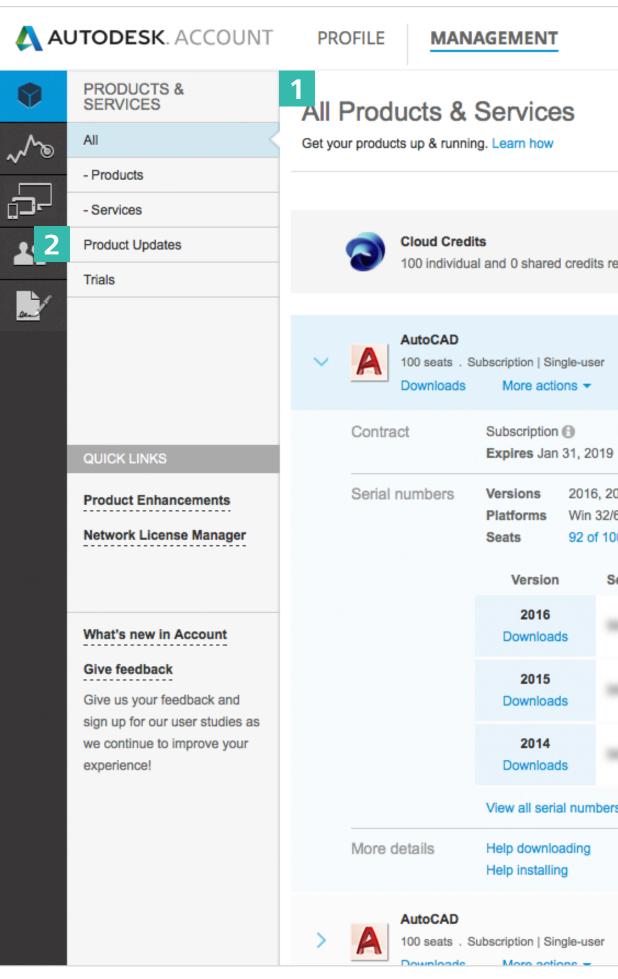
FAQ

Additional Resources

CONTINUED

STEP 4

Review Your Subscription Products & Services



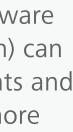
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OTHER NOTABLE DETAILS:

- 1. Products & Services will display different **information** depending on the permissions of the signed in user.
- 2. Product Updates are accessible here. All Admins (Contract Managers and Software Coordinators) and Users (with permission) can access any product update, enhancements and extensions. Open the drawer to reveal more details.

<u>NOTE</u>: Older Product Updates - To access product enhancements and updates for 2015 products or earlier, use the Quick Links menu item "Product Enhancements."











Before You Start: Get Ready for Setup +

→ Setup & Installation

Setup Process

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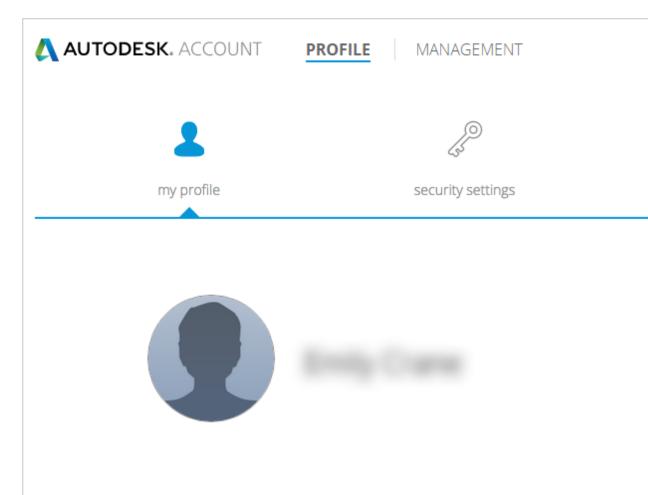
FAQ

Additional Resources

STEP 5

Set Up/Update Your Profile

One of the most important things you can do is to make sure the information on your Autodesk Profile is correct and key account preferences (e.g., language) are set.



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linked accounts	preferences	
	Edit Profile	

My Profile

This profile is your professional presence across Autodesk properties and applications, including collaboration pools, forums and services. Here you can add personal information like a bio, professional information and an address.



BEST PRACTICE

Set up your profile and keep it **current.** Set up your profile completely when you first sign in and edit it whenever information changes to keep it up to date.

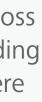


IMPORTANT

Profile information is strictly for personal use and will not affect your global Autodesk system of record. For example, the address here is NOT the billing or shipping address.

To update your shipping address, contact your reseller or Autodesk customer service.

Learn more on how to update billing information for your subscription **2**.









Before You Start: Get Ready for Setup

→ Setup & Installation

Setup Process

- STEP 1: Order Processed Email (Email #1)
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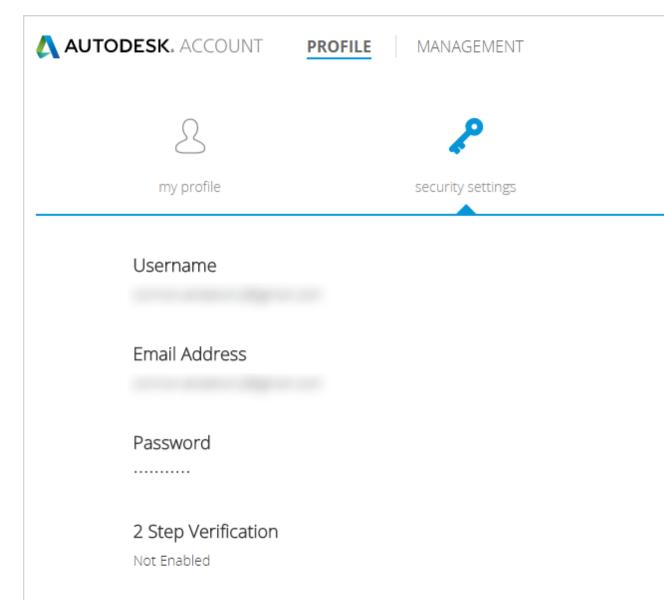
STEP 5

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Set Up/Update Your Profile



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linked accounts	preferences
	Change Username
Verify Email	Change Email
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	Change Password
	Set Up
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Security Settings

This is where you will see your Username, as well as verify and change your **email address** and **password**.



BEST PRACTICE

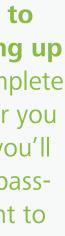
Keep your email address current. Keeping your email address updated will ensure that you will receive the latest information, access to any new benefits, renewal notification emails, and other important communications.

Add an extra layer of protection to your Autodesk Account by setting up **2 Step Verification.** Once you complete the simple set up process, whenever you sign in to your Autodesk Account, you'll be requested to provide both your password and a security code that is sent to your phone.













Before You Start: Get Ready for Setup

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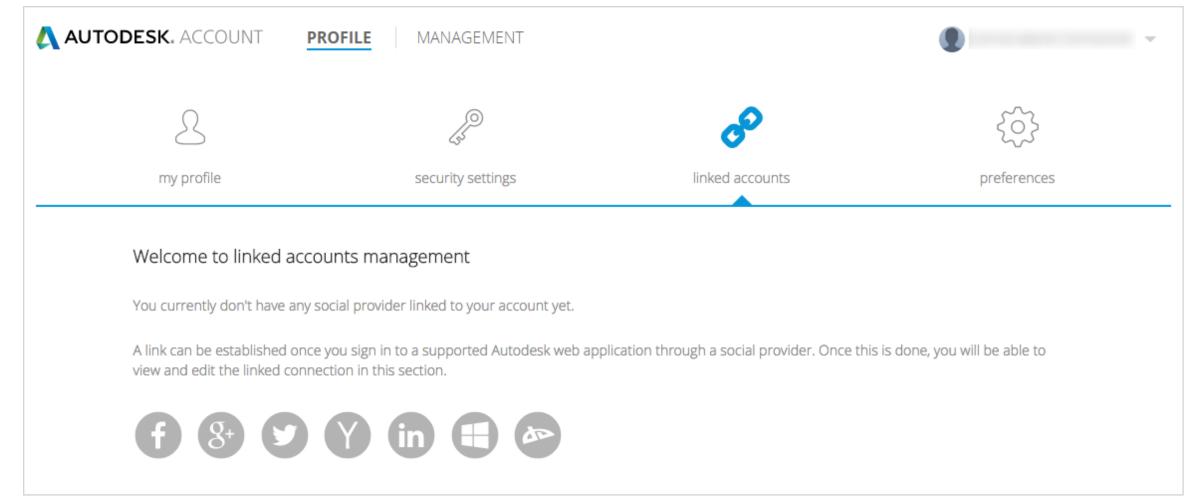
STEP 5

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Set Up/Update Your Profile





Linked Accounts

As part of creating your professional Autodesk profile, you can also link to a variety of your key social media profiles.





Before You Start: Get Ready for Setup

→ Setup & Installation

Setup Process

- STEP 1: Order Processed Email (Email #1)
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STEP 5

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Set Up/Update Your Profile

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my profile	security settings	linked accounts	preferences
Language			Change Language
English			
English			

Preferences

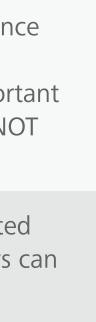
LANGUAGE: Choose your language preference for Autodesk Account. This also impacts the language that will be used for ongoing important communications from Autodesk. This does NOT impact software use.

NOTE: By default, a user's language is selected by the Contract Manager. Once set up, users can change their language preference here.

COMMUNICATION: You can also elect to receive valuable communications from Autodesk about your products.

BEST PRACTICE

Sign up for communications. We recommend that you elect to receive email communications to stay in the know. These communications include valuable information such as getting started with products, product insights and best practice information.











Before You Start: Get Ready for Setup ╋

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Setup Process

- STEP 1: Order Processed Email (Email #1)
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STEP 6

Set Up a Software Coordinator (if needed)

<u>NOTE</u>: This section is only relevant if you plan to identify someone to support the management of your subscription and Users.

Contract Managers can assign a **Software Coordinator** to help them manage a group of users per serial number or group of products. A Software Coordinator is a person who will receive notifications about product releases, can set up Users, view serial numbers and product keys, as well as request previous versions and home use licenses. See **Capabilities Matrix S**

Not every Contract Manager will need a Software Coordinator. However, larger teams or situations where there is an individual/ IT Manager tasked with installing the software, as opposed to subscribing to the software, will often call for a Software Coordinator.

NOTE: Only Contract Managers can assign (or change) Software Coordinators. If a Software Coordinator is not assigned, the role's capabilities will default to the Contract Manager.

TIME ALERT **Processing Time**

It may take hours for the system to show Admins that Software Coordinators have been newly assigned.



BEST PRACTICES Assign your Software Coordinator early on, if applicable. If you know your Software Coordinator will be responsible for managing users, consider adding them first and then let them do the following steps to become familiar with the systems as they set up users and give access to products and benefits.



Before You Start: Get Ready for Setup

→ Setup & Installation

Setup Process

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Set Up a Software Coordinator (if needed)

How to Add a Software Coordinator

- 1. Select **Management** in the top menu within your Autodesk Account to view your Products & Services.
- 2. In the left navigation, click on **Users**.
- 3. Click the Manage Software Coordinators link on the Manage Users screen in the Quick Links area.
- 4. A new window will open up for Software Coordinator Management.

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	Manage Phone Support Manage Software		
	Coordinators 🗗		

NOTE: Autodesk Account uses the Contract Manager as default Software Coordinator until another user is assigned the role.



5. Select the **contract number** associated with the software and the user you wish to manage on this screen.

Software Coordinator Management

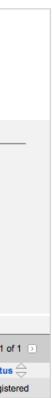
Click the Contract # below to manage Software Coordinators, products, groups, and shipping locations under the selected contract. Search: To find or filter on specific contract details, press Search.

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6. To add the Software Coordinator, click the **Products** tab to access settings for assigning a coordinator to a product or group of products.

Software Coordinator Management									
Use this page to manage Coordinators who perform subscription administrative tasks for your company; edit shipping locations for your Coordinators; or name groups for your products. Software Coordinators tab: Select the Software Coordinator with a shipping location you would like to edit.									
Software Coordinators tab: Se Products tab: Select the product Selected Contract Details					another group.				
Contract:			Contract M	anager		Compan	ny Details		
Program:	Subscription		Nan	e:			Name:	Autodesk	
Start Date:	5/26/2015		Ema	il: •		Ad	idress 1:	100 Commercial St Rm	3120B
End Date:	12/31/3333		Phone	#:		Ad	Idress 2:		
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Software Coordinators	Products								
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Before You Start: Get Ready for Setup

→ Setup & Installation

Setup Process

- STEP 1: Order Processed Email (Email #1)
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- STEP 9: Download & Install Products

STEP 10: Launch Software

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STEP 6

Set Up a Software Coordinator (if needed)

How to Add a Software Coordinator

7. Check the products you wish to assign to a coordinator and click the Assign button.

NOTE: A Contract Manager can set up separate Software Coordinators for separate products.

Software Coordinators	Products							
Search Rename G	roup				So	ftware Coor	dinators Assign Unassign	< 1-1 of 1 >
Serial # 🚔	Group 🚔	Product Family 🚔	Release	Language 🚔	Deployment	Seats	Software Coordinator	Status 🚔
558-8		Autodesk AutoCAD	2016	Non-Language Specific	Standalone	2	Paras Reserves	Registered

8. Click the **email icon** button next to the Software Coordinator field to get the Assign Software Coordinator pop-up window.

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Assign Softw	are Coordinato	r				
You are about to as	sign a different Softwa	are Coordinator to the selected p	products.			
The Software Coord manage all products		or receiving software and mana	ging other users on the contr	act they coordinate. The c	hanges you make here	will result
2. Select a coordina	tor from the list to ass	are Coordinator name to display ign to all products listed below. ges to all products listed below a				
Serial #	Group	Product			Deployment	Seat
558		Autodesk AutoCAD 2016 No	n-Language Specific		Standalone	2

		Close Window
result in assi	gning a different Softw	vare Coordinator to
Seats	Software Coordinate	or
2		
		Apply to All Cance

9. Click the Add button or Search (and Go) to designate a NEW Software Coordinator OR select from the list of existing Software Coordinators by clicking on the arrow in the first column next to the user's name. When you are done with the process, click the Assign button to confirm your choice.

Autodesk [®]	0	0		Assign Software Coordina	tor	R ₂	T
Coverage Report Coor	🗋 e	customer.auto	desk.com/				
	Add			Find: First Name 🗘 star	ting with:	Go < 1 - 7 of 7 >	
Assign Software Co		First Name 🚔	Last Name 🚔	Email Address 🕁	Phone	Shipping Location	
You are about to assign a dif	٠	(inclusion)	(internet)	and consideration on	-	The Real Property lines	
The Software Coordinator is	>	Patas	Second Second	Internet in Corporation 1		All location in	ware Coordinate
manage all products listed be	>	Sterner 1	Real Property lies	more configuration on	101000-000	Contraction Print	
1. Press the pick button besic	\geq	-	distanting (stant declinations and		and Tang Ave N	
 Select a coordinator from t Press Apply to All to appl 	>	Term .	1100	form programmer and	10000	Contraction Print	
5. Fiess Apply to All to appl	>	100	(Trapert	a had a gentlike stated out		10 Company & No. 2128	
	>	Million Control of Con	The set	where the study of the set	-	10 Converse & No. 1128	
ierial #						Assign Cancel	tor
558-000000	-	Autodesk At	ILUGAD ZUTO NUII-LAI	iguage opecilic	Standarone	2 генсе зоогенко	- 1

10. If you are adding a new Software Coordinator who does not come up in Search, click "Add" (in the previous step), complete the requested information and click the Add button here.

ecustomer.autodesk.com/				
Add a Software Coordinator to manage the selected pro the user already exists, the user will be promoted to a S			based on the req	uired fields will be performed.If
*First Name:	*Email:			
*Last Name:	Phone:			
Shipping locations are assigned to the Software Coordin this shipping location, select the Software Coordinator of			nanage on this cor	ntract are to be shipped. To edit
Shipping Location:	-			
				Add Cancel









Before You Start: Get Ready for Setup ╋

→ Setup & Installation

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STEP 6

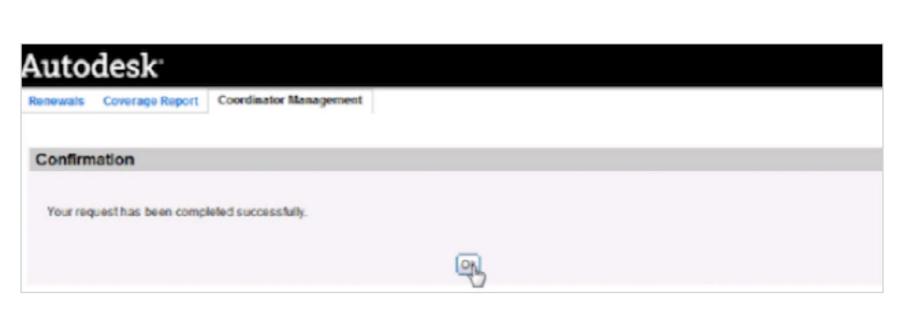
Set Up a Software Coordinator (if needed)

How to Add a Software Coordinator

11. Click the Apply to All button to commit your chang

Assign Softw	are Coordinato	r		
You are about to as	sign a different Softwa	are Coordinator to the selected products.		
The Software Coord manage all products		or receiving software and managing other users on the contract they	coordinate. The changes you make here v	vill re:
2. Select a coordina	tor from the list to ass	are Coordinator name to display a list of Software Coordinators in you ign to all products listed below. iges to all products listed below and return to the previous page.	ur company.	
Serial #	Group	Product	Deployment	S
558		Autodesk AutoCAD 2016 Non-Language Specific	Standalone	2

12. Click **Ok** on the resulting Confirmation screen. This will also trigger an email to the newly assigned Software Coordinator.



More information: **How to change the Software Coordinator**

	P	_	
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l result in assi	gning a different Softw	vare Coordinator to
Seats	Software Coordinate	
2	Software Coordinate	
		Apply to All Cancel

13. Upon set up completion, the new Software Coordinators will receive a "Your permissions have changed" email telling them about the role shift and new benefits.

New Software Coordinators will need to accept the updated terms and conditions for this role when they sign in to Autodesk Account to access additional user management tools and subscription information for the first time.

Your permissions have changed	
Dear	
Your permissions settings have been changed by your admin Account to view your permissions, access your products and	
Login to access all of your benefits	
User ID	
ACCESS AUTODESK ACCOUNT	
Forgot your password?	
Next Steps	FAQs / HELP
 Verify the products and services you can access in Autodesk Account. <u>See what you can access ></u> 	Installation Help Cloud Credits
 Download products, access services, and track cloud credits usage. 	Need more help?
To change your access, please contact your administrator. Please do not reply to this email. This is an automated email.	
	Terms & Conditions Privacy
© 2015 Autodesk, Inc. All rights reserved Legal Notices & Trademarks	



BEST PRACTICE

Check the Software Coordinator status. Contract Managers should check on the User Management page to confirm that Software Coordinators have been successfully assigned. If this isn't showing within 24 hours, the CM should log a support case for fastest resolution.





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Set Up Users

Before users can download, install and use their subscription products and benefits, the Contract Manager or Software Coordinator MUST (1) add the users in Autodesk Account AND (2) give users access to products and benefits.

This two-step setup process is often called Naming Users or User Management.

SINGLE OR MULTIPLE USER SETUP

Autodesk Account allows you to add a single user or enter a list of multiple users and assign the same benefits to all users at one time. Users will be notified of any addition to a contract or change in benefits at the email address associated with their User ID.



BEST PRACTICE Be Prepared. As noted in the **Before You Start** Section, gather together necessary information for each user: First name, last name, User ID, and associated email address.



IMPORTANT NO USER ID YET?

The User Setup process will create an User ID for users who do not already have one. Users should wait for their Get **Started email** (or Change in Benefits email) to arrive and sign in with the specified credentials. Users should not create their own additional account.



SETTING UP CALLERS

Setting Up/Naming Callers for phone support is a different process from naming Users for product and service access. Contract Managers and Software Coordinators with Advanced Support plans can uplift which Users are able to call 1:1 telephone support as part of Advanced Support benefit. This designation is what makes a User also a NAMED CALLER.

Named Callers MUST FIRST BE Named Users. See how to Name Callers **O**













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\land AUTODESK. ACCOUNT	PROFILE MANAGEMENT
USERS	All Users (7)
Manage Users	+ Add Actions
	Add Users Bulk Add
<u>28</u>	User Info
QUICK LINKS	All fields are required Email
Manage Phone Support	First Name
Manage Software Coordinators	
	Last Name
What's new in Account	→ Add Another User
	I'd like to add access to the user(s) now.
	Save & Continue Cancel

Q Search name or email					
S	Sort by: Fir	rst name (A	-Z) 🔻	Filters	
				7 result	
Products & Services 0	Benefits 1	Status	Edit Access	0	
Products & Services 1	Benefits 1	Status	Edit Access	0	
Products & Services 0	Benefits 4	Status	Edit Access		
Products & Services 0	Benefits 4	Status	Edit Access		
Products & Services 0	Benefits 1	Status	Edit Access	8	
Products & Services 0	Benefits 2	Status	Edit Access	8	
Products & Services 0	Benefits 1	Status	Edit Access	8	

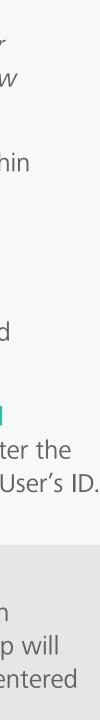
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How to Add a Single User

If you would like to add more than one User at a time, please see the next section on how to add multiple Users.

- 1. Select **Management** in the top menu within Autodesk Account to view your Products & Services.
- 2. In the left navigation, click on **Users**.
- 3. Click the **+ Add** button to activate the Add Users window.
- 4. Enter the **email address**, **first name and last name** (all are required). Be sure to enter the email address already associated with the User's ID.

<u>NOTE</u>: If this **User ID already exists**, this step will link the User to your subscription contract. If it does not already exist, this step will create a new User ID for the User with the entered information.





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🙏 AUTOD	ESK. ACCOUNT	PROFILE MANAGEMENT
USER USER	RS	All Users (7)
Manag	je Users	+ Add Actions -
		Add Users Bulk Add
22		User Info
		All fields are required
QUICK	LINKS	Email
Manag	e Phone Support	First Name
	ge Software inators	James
		Last Name
		Engeneer
What's	s new in Account	Add Another User
		I'd like to add access to the user(s) now.
		Save & Continue Cancel

Q. Search name or email					
S	Sort by:	First name (A	-Z) 🔻	Filters	
				7 resu	
Products & Services 0	Benefit 1	ts Status	Edit Access	8	
Products & Services 1	Benefit 1	ts Status	Edit Access	Ø	
Products & Services 0	Benefit 4	ts Status	Edit Access		
Products & Services 0	Benefit 4	ts Status	Edit Access		
Products & Services 0	Benefit 1	ts Status	Edit Access	Ø	
Products & Services 0	Benefit 2	ts Status	Edit Access	8	
Products & Services	Benefit 1	ts Status	Edit Access	8	

5. Check "I'd like to add access to the user(s) **now**" if you wish to manage access to products and benefits.

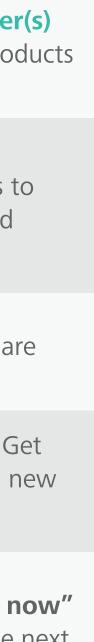
NOTE: Added Users will have access to an Autodesk Account but will NOT have access to products and benefits until they are assigned (Step 8).

6. Click the **Save & Continue** button if you are done.

<u>NOTE</u>: Clicking Save & Continue will send a Get Started email with sign in credentials to this new User.

7. If "I'd like to add access to the user(s) now" was checked, this process continues to the next section: Step 8: Give Users Access O.









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Δ Αι	UTODESK. ACCOUNT	Ρ	ROFI	LE	MAN	AGEME	NT
Ŷ	USERS	A	ll Us	ers (7))		
No	Manage Users		Add	Action	c	-	
<u>F</u>				Users		ılk Add	
<u>40</u>			Paste a	a list of us	ser name	es and email	s (max. 50 u
and t	QUICK LINKS		/ (
	Manage Phone Support	_	5				
	Manage Software Coordinators		_		-	e@email.con m Doe <jim< th=""><th></th></jim<>	
			🗹 I'd I	like to ad	d access	s to the user	(s) now.
	What's new in Account		Save	e & Cont	Inue	Cancel	
			>	-			
			>		-		

		Suppor	t 🔻		
		୦, S	earch nam	e or email	
	S	Sort by: Firs	st name (A	-Z) 🔻	Filters
×	_				7 result
sers)	Products & Services 0	Benefits 1	Status	Edit Access	8
12	Products & Services 1	Benefits 1	Status	Edit Access	8
9	Products & Services 0	Benefits 4	Status	Edit Access	
com>	Products & Services 0	Benefits 4	Status	Edit Access	
	Products & Services 0	Benefits 1	Status	Edit Access	8
	Products & Services 0	Benefits 2	Status	Edit Access	8
	Products & Services 0	Benefits	Status	Edit Access	8

How to Add Multiple Named Users

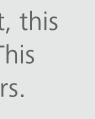
- 1. Select **Management** in the top menu within Autodesk Account to view your Products & Services.
- 2. In the left navigation, click on **Users**.
- 3. Click the **+ Add** button to activate the Add Users window.
- 4. Click Bulk Add.
- 5. Type or paste a list of Users into the **entry field** following the example provided. As many as 50 Users can be entered at one time.

NOTE: If the entered User IDs already exist, this step links the Users to your subscription. This step will create a User ID for any new Users.













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🙏 AUTODESK. ACCOU	NT PROFILE MANAGEMENT
USERS	All Users (7)
Manage Users Image Control Image Contro <	Add Users Bulk Add Paste a list of user names and emails (max. 50 u e.g. John Doe <john.doe@email.com>; Jane Do jane.doe@email.com, Jim Doe <jim.doe@email &="" access="" add="" cancel<="" continue="" for="" i'd="" like="" now.="" save="" th="" the="" to="" user(s)=""></jim.doe@email></john.doe@email.com>

		Suppor	t 🔻	•	The second secon
		Q S	earch nam	e or email	
	s	ort by: Firs	st name (A	-Z) 🔻	Filters
×					7 results
0 users)	Products & Services 0	Benefits 1	Status	Edit Access	8
122	Products & Services 1	Benefits 1	Status	Edit Access	8
Doe	Products & Services 0	Benefits 4	Status	Edit Access	
ail.com>	Products & Services 0	Benefits 4	Status	Edit Access	
	Products & Services 0	Benefits 1	Status	Edit Access	8
	Products & Services 0	Benefits 2	Status	Edit Access	8
	Products & Services 0	Benefits 1	Status	Edit Access	8

6. Check "I'd like to add access to the user(s) now" if you wish to manage access to products and benefits.

NOTE: Added Users will have access to an Autodesk Account but will NOT have access to products and benefits until they are assigned (Step 8).

When you set up multiple Users and check "I'd like to add access to the user(s) now," ALL Users will be assigned identical permissions and access. If you wish to have access to benefits, products and services individualized, it is best to add these users separately or uncheck the box to add access now.

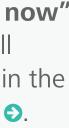
7. Click the **Save & Continue** button. Added Users will receive a Get Started email that welcomes them to subscription.

NOTE: Clicking Save & Continue will send a Get Started email to all Users listed in this step with their sign in credentials.

8. If "I'd like to add access to the user(s) now" was checked, clicking Save & Continue will automatically continue this setup process in the next section: Step 8: Give Users Access ().

> More Information: User Management Video Tutorial











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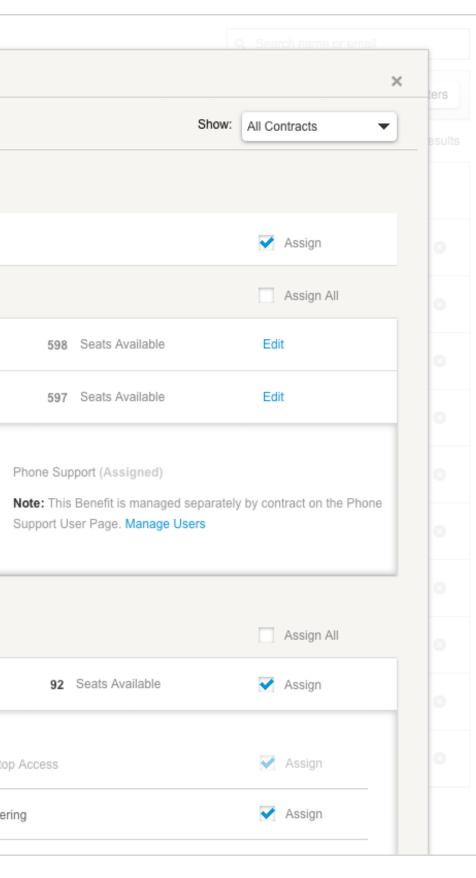
Additional Resources

STEP 8

Give Users Access to Products and Services

Contract Managers and Software Coordinators can add or remove access to products, cloud services, and subscription benefits for Users on a subscription contract in Autodesk Account. This must happen after Users are set up in order for Users to access any of their subscription privileges.

			All Users (11)				
Ec	lit A	ccess :					
AII	E	Benefits Products & S	ervices				
В	lene	fits 🚺					
		Product Downloads (All P	roducts)				
	>	Product Updates and Sup Contract #	oport			2/2	Benefit On
	~	Product Updates and Sup Contract #	oport			3/3	Benefit On
		Benefits					
		Product Updates		~	Assign		
		Web Support		~	Assign		
P	rodu	ucts & Services 🚺					
	~	AutoCAD Contract #				6/6	Service On
		Services					
		Autodesk® Remote		~	Assign		Deskt
		AutoCAD 360 Pro for Subse	cription	~	Assign		Rende
	Ec	Edit A	Benefits Product Updates and Sug Contract # Product Updates and Sug Contract # Benefits Product Updates Web Support Products & Services ① AutoCAD Contract #	Edit Access : All Benefits Products & Services Benefits () Product Downloads (All Products) Product Updates and Support Contract # Product Updates and Support Contract # Benefits Product Updates Web Support Product Updates Web Support Products & Services () AutoCAD Contract # Services	Edit Access : All Benefits Products & Services Benefits • Product Updates and Support Contract # Product Updates and Support Contract # Benefits Product Updates Web Support Web Support Products & Services • AutoCAD Contract # Services Autodesk® Remote	Edit Access : All Benefits Products & Services Benefits Product Updates and Support Contract # Product Updates and Support Contract # Benefits Product Updates Web Support Web Support Assign Products & Services AutoCAD Contract # Services Autodesk® Remote	Edit Access : All Benefits Products & Services Benefits • Product Downloads (All Products) Product Updates and Support Contract # 2/2 Product Updates and Support 2/3 Benefits Product Updates • Assign Web Support • Assign Veb Support • AutoCAD Contract # • Autodesk® Remote

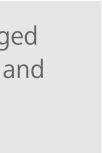


BEST PRACTICE

Give Users access rights after you first add them (Step 7). In this linear setup process, the Edit Access screen, which allows you to give access to Users, will automatically open after Step 7, when "I'd like to add access to the user(s) now" is checked.

<u>NOTE</u>: User permissions can be easily managed and altered any time through the Users List and "Edit Access" actions in Autodesk Account. Learn more **Z**









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<u>NOTE</u>: Pay attention to the **names** at the top of the window. If more than one User is listed, ALL Users will receive the same access configurations by default.

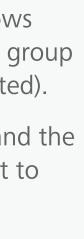
Bene	fits 🚯						
Done	Product Downloads (All Products)						✓ Assign
							Assign All
>	Product Updates and Support Contract #		2/2	Benefit On	598	Seats Available	Edit
~	Product Updates and Support Contract #		3/3	Benefit On	597	Seats Available	Edit
	Benefits Product Updates	~ A	ssign			port (Assigned)	
	Web Support	X A	ssign			Benefit is managed s er Page. Manage Us	y contract on the Phon
Produ	ucts & Services ① AutoCAD Contract #		6/6	Service On	92	Seats Available	Assign All
	Services						-
	Autodesk® Remote		ssign	Desktop A			 Assign
	AutoCAD 360 Pro for SubscriptionStorage	✓ A		Rendering Photo to 3			 Assign
				Service On	01	Seats Available	✓ Assign

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How to Give Users Access to Products & Services

The Edit Access window groups options by Benefits and Products & Services and allows you to customize the access per User or in a group (when more than one User was added/selected).

- 1. **Open the drawer** (toggle arrow) to expand the detail display for each Benefit and Product to make assignments to the User.
- 2. Click on **the "i" information icon** to review your subscription benefits details.



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Give Users Access to Products and Services

	Benefits Products & Services							Show:	All Contracts	•
Bene	fits 🕦									
	Product Downloads (All Products)								🖌 Assign	
									Assign All	
>	Product Updates and Support Contract #			2/2	Benefit On	598	Seats Available		Edit	
~	Product Updates and Support Contract #			3/3	Benefit On	597	Seats Available		Edit	
	Benefits									
	Product Updates	✓	Assign				oport (Assigned)			
	Web Support	~	Assign				Benefit is managed ser Page. Manage Us		by contract on the PI	none
_										_
Prod	ucts & Services 🕕								Assign All	
~	AutoCAD Contract #			6/6	Service On	92	Seats Available		🖌 Assign	
	Services									
	Autodesk® Remote	~	Assign		Deskto	p Access			🖌 Assign	.
		~	Assign		Rende	ing			🖌 Assign	
	AutoCAD 360 Pro for Subscription								💉 Assign	
	Storage	~	Assign		Photo f	0 3D				_
>		~	Assign	6/6	Photo t Service On		Seats Available		✓ Assign	_

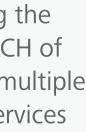
3. Manually assign the access by checking the box or pulling down the menu item for EACH of the appropriate drop-down assignments (multiple Users) to accurately assign benefits and services by product to the Users.

CLICK TO LEARN ABOUT BENEFITS, PRODUCTS & SERVICES



BEST PRACTICE

Give ALL Users access to Web Support here. All subscription Users have access to basic support, which includes 1:1 Web Support and Expedited Forum Support. However, Users must be first granted permission to use Web Support before they can access these benefits.









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Give Users Access to Products and Services

	Benefits Products & Services						Show	All C	ontracts 🔹
								_	
Bene	fits 🕦								
	Product Downloads (All Products)							~	Assign
									Assign All
>	Product Updates and Support Contract #		2	2/2	Benefit On 5	98	Seats Available	E	dit
~	Product Updates and Support Contract #			3/3	Benefit On 5	97	Seats Available	E	dit
	Benefits				51	_			
	Product Updates	~	Assign				pport (Assigned) Benefit is managed separate	ly by co	ntract on the Phone
	Web Support	~	Assign				ser Page. Manage Users		
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Prod	ucts & Services 🕕								Assign All
~	AutoCAD Contract #			6/6	Service On	92	Seats Available	~	Assign
	Services								
	Autodesk® Remote	✓	Assign		Desktop Acces	S		~	Assign
	AutoCAD 360 Pro for Subscription	•	Assign		Rendering			~	Assign
	Storage		Assign		Photo to 3D			~	Assign
				6/6	Service On s	91	Seats Available	~	Assign
>	AutoCAD Contract #110001168773								

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4. Assign specialty web and cloud services, such as Rendering, ONLY to those who need it.

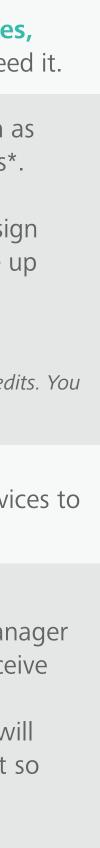
<u>NOTE</u>: Some web and cloud services, such as Rendering, require the use of cloud credits*. All assigned users will have access to the same allotment of cloud credits. If you assign Rendering to all users, your team may use up the cloud credits faster than intended.

Learn more 🛛

*Subscription may include an allocation of cloud credits. You can purchase additional credits if needed.

5. After assigning benefits, products and services to all Users, hit **Save** to continue.

<u>NOTE</u>: Once a User is assigned benefits, products and services by the Contract Manager or Software Coordinator, the User will receive an email letting them know that their **permissions have changed.** This email will include a sign in link to Autodesk Account so the User can access updated benefits and products.







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Give Users Access to Products and Services

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	Coordinators		>		- Baarmetta
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				7 results
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Products & Services 1	Benefits 1	Status	Edit Access	8
Products & Services 0	Benefits 4	Status	Edit Access	
Products & Services 0	Benefits 4	Status	Edit Access	
Products & Services 0	Benefits 1	Status	Edit Access	8
Products & Services 0	Benefits 2	Status	Edit Access	0
Products & Services 0	Benefits 1	Status	Edit Access	8



BEST PRACTICES Check in with Users.

It is important to check in with new Users to confirm they are able to successfully access the products and benefits. If there are problems, it is the responsibility of the Contract Manager or Software Coordinator to notify Autodesk by logging a support case so that we may resolve issues quickly.



Check your User status.

Contract Managers and Software Coordinators should go back to the Products and Services Manage Users page to confirm that any Users assigned to products and benefits have successfully signed into their Autodesk Account. Status will show as a **check mark** if they have logged in successfully or grey pending if they have not.

More information: Setting User Permissions

User Management Video Tutorial











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Preparing System for Installation

It is **strongly recommended** that Contract Managers and Software Coordinators review all system requirements **before** installing software to ensure a system is optimized for download, installation and using the software.

Be proactive. Perform an initial check of your system before even downloading the products. Try the following links for more information:

Full list of System Requirements for Autodesk Software

Preparing your System for Installation

<u>NOTE</u>: You can also look for the **System Requirements** link at the base of Product Install screens.

		2.62 GB of 4.33 GB downloaded - 11	mins remaining
	Overall progress		13 of 23
3	installation Help	Enedma	Pause Dpenkoad



BEST PRACTICE Take a few moments to **review** all system requirements before installing software.







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Download

Contract Managers, Software Coordinators and Users with download privileges can download directly from the **Products & Services** page.

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•	PRODUCTS & SERVICES	All I	Prod	ucts &	Service	s	
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	- Products						
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IMPORTANT Single vs. Multi Seat

The following steps will walk you through a single seat installation. For contracts with multiple seats, each installation will follow the same process.

How to Download and Install

1. Click the default "Downloads" button associated with the desired product. A new window will appear.

NOTES:

- a. **Open the drawer** if you want to see additional files. You can also access serial numbers and product keys here.
- b. The "More actions" menu will offer direct links to Manage User access to product versions.









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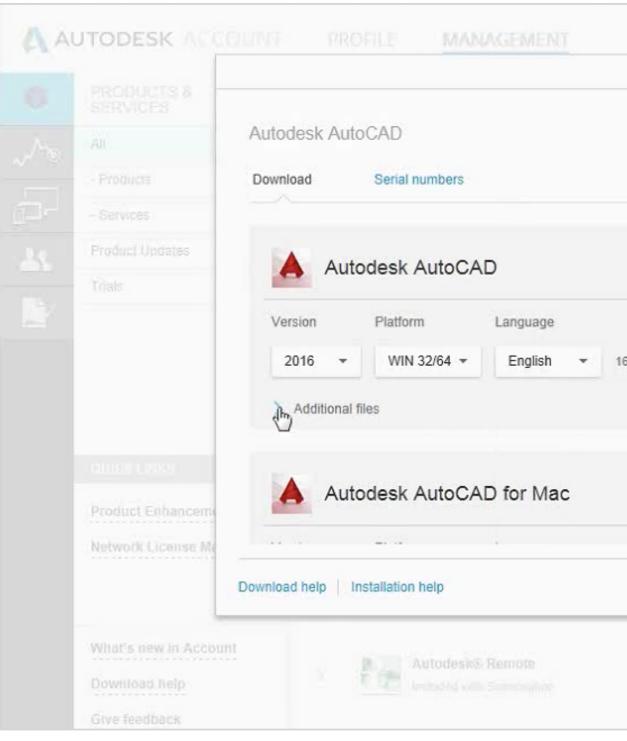
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STEP 9 **Download & Install Products**

Download



2. Select the Version, Platform and Language you want.

NOTE: Users are entitled to eligible previous versions of the current release.

3. This window also shows an **associated file size**.

NOTE: This is the compressed size for download, not the uncompressed file size for installation.

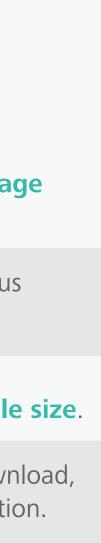
4. Click **Download Now** or **Install Now**.

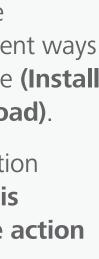
Depending on the product to which you've subscribed, there may be up to three different ways you can download and install your software (Install Now, Download Now, Browser Download).

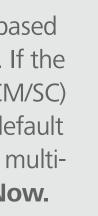
In most cases, Install Now is the fastest option (and also the best option for end users). It is recommended that you install with the action that is defaulted to you.

NOTE: Autodesk will set the default option based on the user type and product file availability. If the user is either a Named User or the Admin (CM/SC) with a single seat contract, the button will default to Install Now. If the user is an Admin of a multiseat contract, it will default to **Download Now.**

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Install now		











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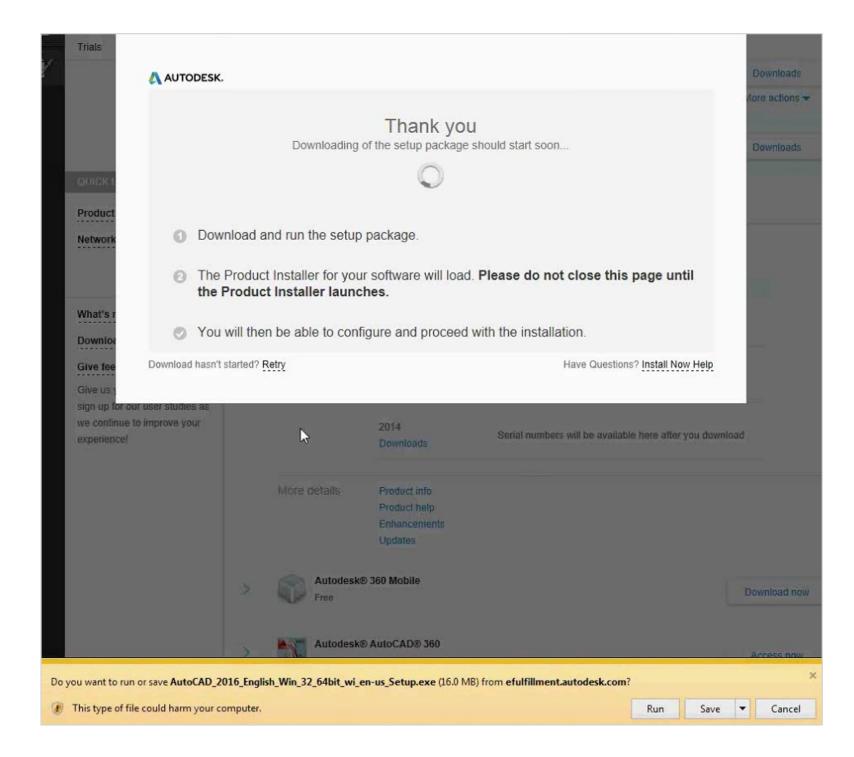
Download & Install Products

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More information: **Download methods for Autodesk Account** Software & Download Support

- 5. Accept Terms and Conditions, and click Install.
- 6. You should receive a **Thank You message**.
- 7. When prompted, you can either **Run** or **Save** the downloaded file.

If you hit RUN, it will start the installation. An immediate installer will automatically pull in your serial number information and get you up and running fastest. This method is recommended.

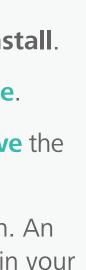
If you hit SAVE, it will download the software to your Downloads folder and will not actually install the software at this time.

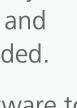
NOTE: All products can be installed up to 30 days (after downloading) without a serial number. You will need to enter your serial number information separately if you wait longer than 30 days after the installation date.



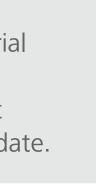
BEST PRACTICE

Keep all downloaded files together. When you hit SAVE, you may download multiple files. If they get separated, you might get an error when the files try to extract as they search for all related files at the start.















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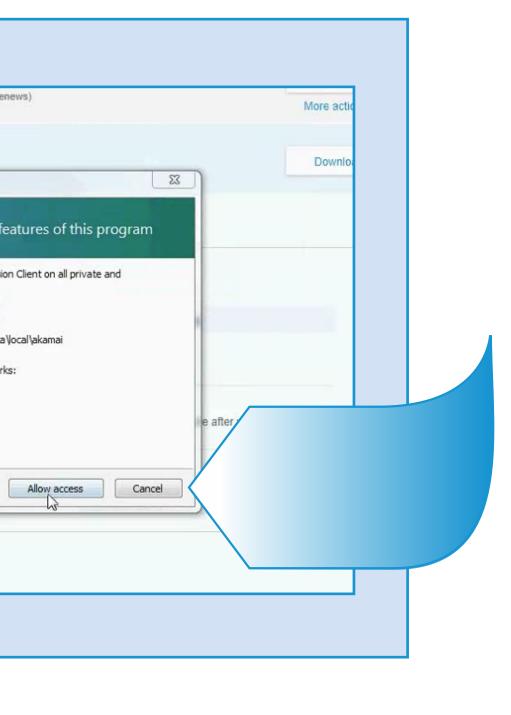
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Akamai NetSession Firewall Message

If you see a message about your firewall blocking some features and asking if you want to allow access and install Akamai NetSession, you should hit "Allow Access."

Akamai NetSession is the software that Autodesk uses to help speed up the downloading and installation process by moving the downloadable content to a server physically closer to you.

		Desktop Subscription (Au	
	AutoCAD	K	
	a second and	ubscription	
Windows Secur	ity Alert	-	
Windows Firewall ha			
domain networks.	Name:	Akamai NetSession Cl	
	Publisher:	Akamai Technologies,	
	Path:	C: \users \craneem \ap \netsession_win.exe	
Private networks, such as my home or work network			
What are the risks	of allowing a pr	ogram through a firewall	
More	e details	Product info	
		Product help	
	Windows Firewall ha domain networks.	Windows Security Alert Windows Firewall has blocked som domain networks. Name: Publisher: Path: Allow Akamai NetSession Client to	







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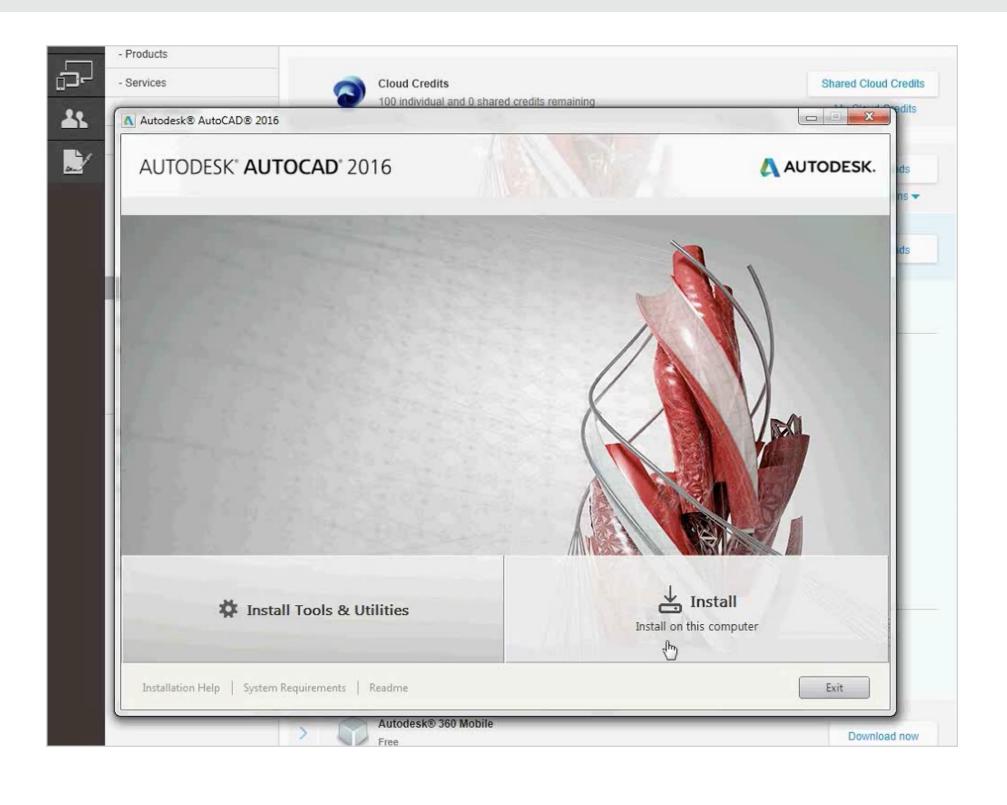
STEP 9

Download & Install Products

Install Products

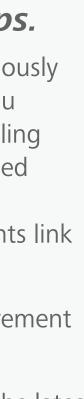
Software installation can happen as part of the Install Now download method (recommended) or can be done at a later time after product files have been downloaded through the Download Now or Browser Download methods.

<u>NOTE</u>: The **Install Now** method must be completed while you are still signed in and connected to the Autodesk Account portal or it will fail.



The Install Manager will walk you through the necessary steps.

- 1. Review System Requirements. As previously noted, we strongly recommend that you review system requirements **before** installing software to ensure your system is optimized for download, installation and use of the software. Click on the System Requirements link or learn more here 🔼
- 2. Install Tools & Utilities. It is not a requirement to install tools and utilities.
- 3. Review the Read Me. This link includes the latest information for your product.
- 4. Click Install to continue.







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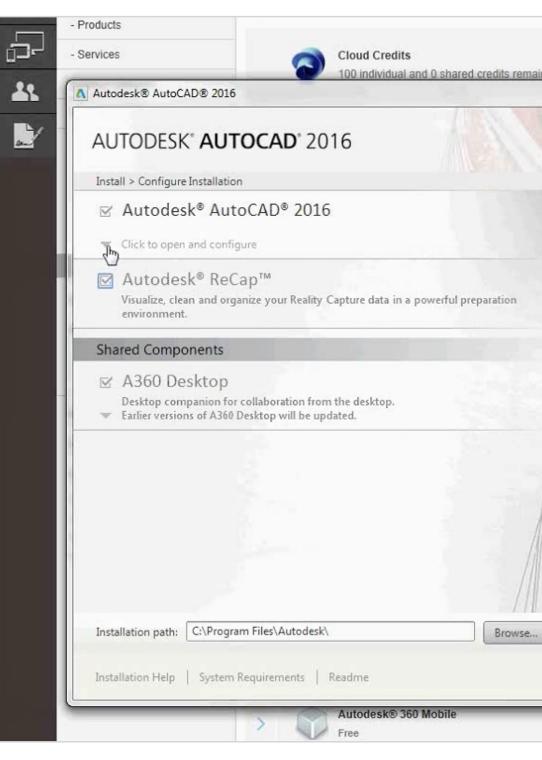
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Shared Cloud Credits X AUTODESK. Disk space: 9.47 GB required / 109 GB available Back Install Cancel Download now

- 5. Next, the Install Manager will check to see what components you already have installed via other Autodesk software and then will offer you a screen to **choose the components** you would like to install.
- 6. If a custom installation is needed, hover over the product name and click the **toggle arrow** to open the configuration details.

NOTE: It is recommended that you install all components that Autodesk recommends. These recommendations are based on typical installation needs for the best product experience.

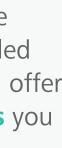
7. Click Install to continue.



BEST PRACTICE Allow a desktop shortcut.

Autodesk recommends that you allow the icon/desktop shortcut to download to your desktop, as this will make it easier to launch the software once it is successfully installed.

















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- - X AUTODESK. 13 of 23 remaining Pause Dgwnload Cancel

- 8. During download and installation, you will see the **time remaining** constantly recalibrating based on bandwidth and effort remaining.
- 9. The **total file size** numbers will also continuously adjust as files are downloaded, unzipped and installed.
- 10. To interrupt the software download for any reason, you can hit "Pause Download." This can be helpful if you need to change location mid-installation or will not have Internet access.

NOTE: The system will need time to resolve the installation task at hand and will pause when that task is completed.

Hit "Resume Download" when you are ready to continue.

11. For additional help with downloading and installing software, click "Installation Help" in the lower left corner of the Install Manager window.

<u>NOTE</u>: Clicking on these support links will NOT interfere with the product installation process at any time.











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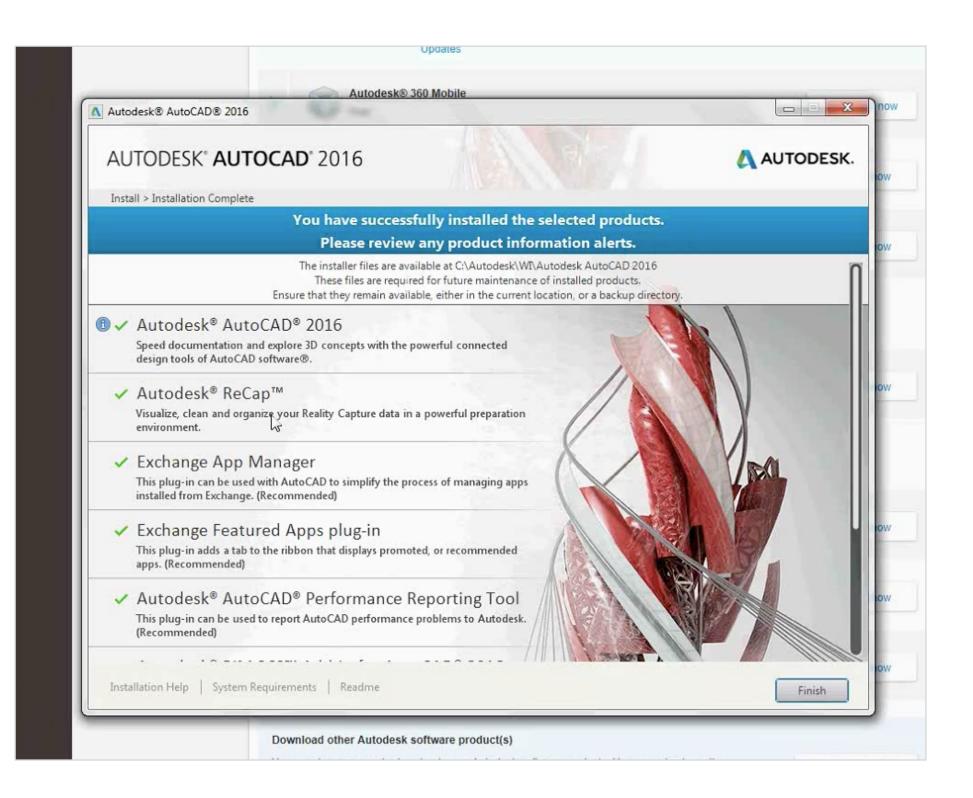
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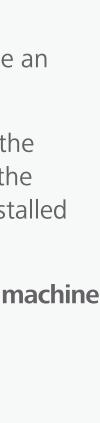
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- 12. After installation is complete, you will see an Installation Success message.
- 13. Click **Finish** to close the installer. When the installation is finished you'll see a list of the software components that have been installed on your computer.
- 14. You will then be prompted to restart your machine to have all changes take effect.

More information: Installation & Configuration Support









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Launch Software

After installation and rebooting your system it is time to launch and activate your software. You **must be connected** to the Internet to do this successfully.

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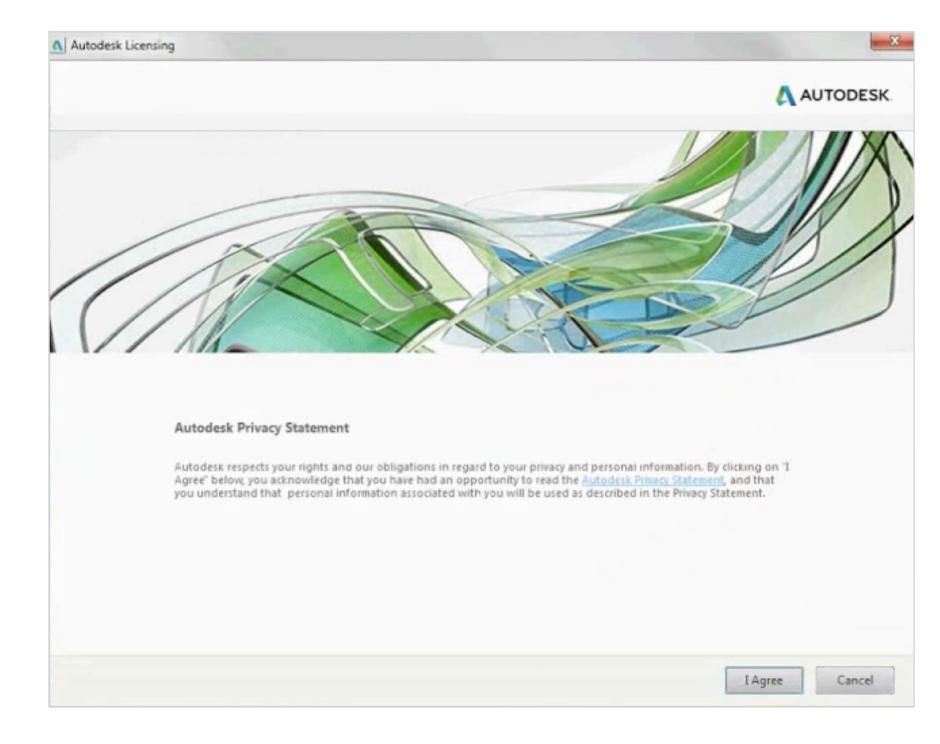
IMPORTANT

Subscription licensing technology occasionally requires a connection with Autodesk. It is first required when you initially access your product. This connection will complete the installation process by authenticating the license and User. Authentication will occur again periodically, about every 30 days or so over the term of the subscription.

1. Click on the product shortcut on your desktop.

<u>NOTE</u>: If you opted not to create a desktop shortcut, launch the product by going to the Start menu > Programs > Your Product.

2. You will need to Agree to the Autodesk Privacy Statement.









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Launch Software

3. Upon launch, you will see an **Autodesk Licensing Verification** box.

	UTOCAD [°] 2016
	Autodesk Licensing
	Please wait while your license is being verified
	///////
Checking license	



4. Then, an Autodesk Account Sign In window will pop up.

Autodesk Account
AUTODESK. Sign in with an Autodesk Account
Autodesk ID or email address
Password.
Sign In
Need an Autodesk ID? Forgot your password?

5. Sign in using your User ID and Password to verify your identity and license. This window will pop up even if you are currently signed into Autodesk Account via a web browser.

<u>NOTE</u>: You must sign in at first launch and then again every 30 days to verify your identity.











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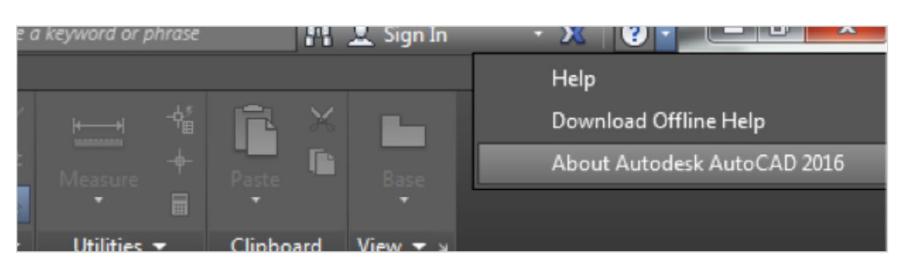
Launch Software

- 6. Once you've launched your product, you should be able to see your main interface.
- 7. You can also sign into the A360 collaboration and other tools from this screen.

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. 1389	Get Started Fundation Start Drawing Constant Constan	Auto Auto	re and/or packaged todesk technology ers: utodesk, Inc., and/or its idesk, Inc., and/or its idesk, Inc., and/or its idesk, Inc., and/or its idesk, Inc., and/or its
		Ureamine, Aufeit IDF, Autoritantin, Eutorinan, Autoritanis, Banki BM 300, Burn, Buzzaan, Cabrego, CalcT, Caledaut, Criseinge, Calcologia and Caledauter Construction of the	upter, Eachdraft, Beast,



8. See product details including serial number by clicking on **About** (in the upper right-hand corner).



9. Then click on **Product Information**.

About	-	
AUTODESK*		
AUTOCAD		
		ĸ
Product Version: M.49.0.0 AutoCAD 2016	Product Information	
© 2015 Autodesk, Inc. All rights reserved.		Ţ
All use of this Software is subject to the terms and conditions	s of the Autodesk	
All use of this Software is subject to the terms and conditions license agreement accepted upon installation of this Software with the Software. This Product or Service may incorporate or use background Auto components. For information about these components, dick her <http: cloud-platform-components="" www.autodesk.com="">.</http:>	e and/or packaged	
license agreement accepted upon installation of this Software with the Software. This Product or Service may incorporate or use background Auto components. For information about these components, click her	e and/or packaged	
license agreement accepted upon installation of this Software with the Software. This Product or Service may incorporate or use background Auto components. For information about these components, click her < <u>http://www.autodesk.com/cloud-platform-components</u> >.	e and/or packaged odesk technology re:	





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Launch Software

10. On the Product License Information screen, you will see your associated serial number. If you need to enter or update your serial number (provided by an Admin), click the Update button, enter the number and then click the Close button.

License name: Autodesk AutoCAD 2016	Computer host name:
Serial number:	Product key:
558	Update
License type:	License usage type:
Standalone - Locked	Commercial
License behavior:	License expiration date
Extendable	Subject to license term
License ID:	License Model:
ACD_F_S	Term





BEST PRACTICE

Update contract through only the serial number. If for any reason you change contracts, it is best to go to the Product License Information screen again to update your serial number. For example, if you have a recurring monthly contract and then move to a renewing annual contract, all you need to do is swap out the new associated serial number. You do not need to uninstall, reinstall and reactivate.





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Setup Process

- STEP 1: Order Processed Email (Email #1)
- STEP 2: Get Started Email (Email #2)
- STEP 3: Sign In to Autodesk Account
- STEP 4: Review your Subscription Products & Services
- STEP 5: Set Up/Update Your Profile
- STEP 6: Set Up a Software Coordinator (if needed)
- STEP 7: Set Up Users
- STEP 8: Give Users Access to Products and Services
- STEP 9: Download & Install Products

STEP 10: Launch Software

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Launch Software

Troubleshooting Activation & Activation Errors

If you have difficulties with product activation or get errors, please review the following information as well as the support links below.

CONNECTION ERRORS: Internet Ports 443 and 80 should be opened.

For companies that completely disable Internet traffic (blocking Ports 443 [HTTPS] and 80 [HTTP]), subscribing to Autodesk software is not currently an option. If, however, your company secures your network by routing Internet traffic through a proxy server (a standard proxy or an authenticated, password protected proxy), then a software subscription is still an option for you with a workaround known as "whitelisting."

Please check out these knowledge base articles that declare a set of Autodesk domains that can work within the proxy security settings:

Proxy server setting changes required to unblock Autodesk A360 services

Subscription Licensing Error: "Establish an Internet connection to continue"



More information: OTHER ERRORS AND RESOURCES

How to set up McAfee ePolicy **Orchestrator to allow Autodesk Products to work with Subscription**

Connection Error: This error can be caused by an inaccurate time on the system clock, or by temporary system unavailability 🛛

Activating & Registering your Autodesk Software Online

Subscription Software Installation









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SUPPORT

All subscribers have access to Basic Support. Advanced Support is available depending on the product or suite edition and your contract. **Basic Support** includes 1:1 Web Support and expedited community forum support, access to helpful tutorials and other online product support. Advanced Support is a subscription add-on that includes Basic Support and Unlimited 24x5 1:1 priority phone support.



IMPORTANT

Access to web and phone support must be assigned to Users by their CM or SC. CMs and SCs have access to all available support by default.

WEB SUPPORT: Web Support access is granted at the time a User is assigned access to Products & Services, or at any time in the Manage Users area of Autodesk Account.

PHONE SUPPORT: Users who are granted permission to use phone support are called Named Callers. Learn about **phone support O** and **Named Callers O**







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What Level of Support Do I Have?

If you are an Admin, but you are not sure what level of support you have, go to the subscription details (in **Management > Billing & Orders**). When you click on the associated contract, it will display the **support level** at the top with the number of products and seats on the contract, and support level by product in the details area.

🙏 Αυτς	DESK. ACCOU	INT PROFILE MANAGEMENT		Support 🤝	· ·
	< Contract #				×
	Products Seats 4	Support Level Basic			
* *	Туре	1-year (Renewal)	Cloud Credi		
<u></u>	Start Date	Feb 16, 2016	No Clo	ud Credits Purchased	Get Cloud Credits
	End Date	🕒 Expires Mar 15, 2016 🚺		Access your cloud services Try	and learn more
	Contract Manager				
	Company	Ddwstest 1219 4040 Civic Center Dr San Rafael, CA, United States 94903-4150			
	Products and Se	ervices			
	Product	Serial / Key	Seats	License Type	Reseller
~	AutoCAD 2016	561	2	Networked	
		Language: Non-Language Specific License Type: Standalone		Software Coordinator: Status: Active	

More information:
 Technical Support Levels

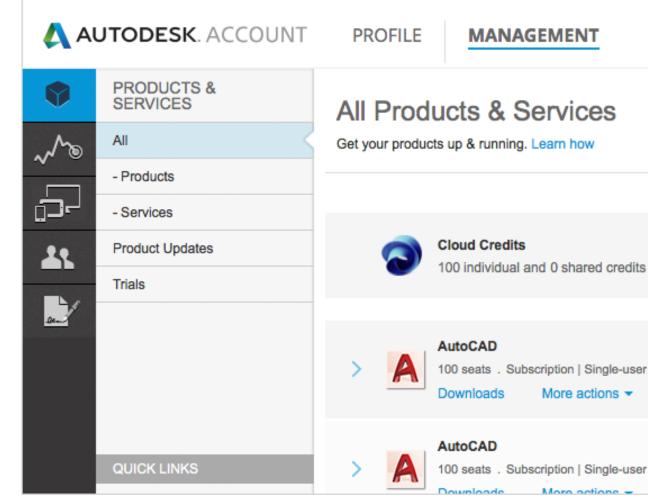
Managing Technical Support for Subscription Products & Services





Accessing Support Options

NOTE: Access to web and phone support must be assigned to Users by their CM or SC.



BEST PRACTICE

Support the Autodesk Knowledge Network. The Autodesk Knowledge Network is actively managed and monitored by Autodesk support specialists. At the base of nearly every self-help and curated support article, in the Browse Support & Learning and **Contact us** sections, is the question "Was this Article Helpful?" We want to know. Please take a moment to provide us feedback, so we can better support your team's needs and the needs of others in the Autodesk community.

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	Browse support	& learning		
	View my support	cases	Search	n products & services
	Contact us			
				Sharad Claud Cradita
				Shared Cloud Credits
remaining	I			My Cloud Credits

TO ACCESS SUPPORT, USE THE TOP **DROP-DOWN MENU AND PICK FROM** THE FOLLOWING THREE OPTIONS:

Browse Support & Learning – This offers access to self-help articles and information organized by products, suites and cloud services on the Autodesk Knowledge Network (AKN), as well as access to community forums.

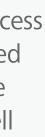
View my support cases – This is where you view and submit web support cases. If you are a Named Caller, you can also locate your technical support phone number(s) here.

Contact us – This launches a support page featuring top support solutions, curated weekly, enabling you to quickly resolve your issues. You can also post a question here. This area is constantly evolving and will continue to deliver more solutions.



IMPORTANT

Finding Your Technical Support Phone Number. If you are a Named Caller on an Advanced Support plan, you can find your support call-in number in the right-hand margin of the View my support cases page. See how to set up Named Callers •

















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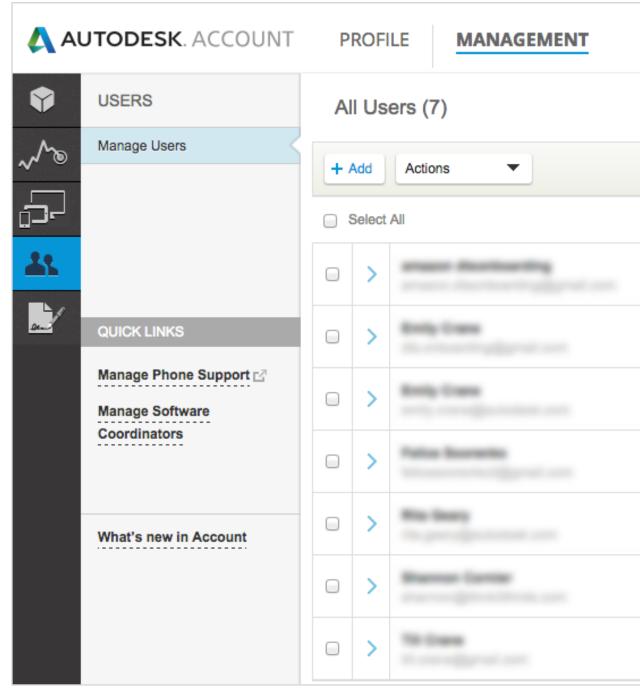
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Phone Support

Phone support is offered to subscribers with Advanced Support. Contract Managers, Software Coordinators and Named Callers have access to 1:1 support with the Autodesk Product Support Team by toll free number.



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S	ort by: Firs	st name (A	-Z) 🔻	Filters
				7 results
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Products & Services 0	Benefits 4	Status	Edit Access	
Products & Services 1	Benefits 1	Status	Edit Access	0
Products & Services 0	Benefits 4	Status	Edit Access	
Products & Services 0	Benefits 1	Status	Edit Access	8
Products & Services 0	Benefits 2	Status	Edit Access	8
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TIME ALERT **Processing Time**

It may take up to 24 hours for your Autodesk Account to show that Users have been assigned phone support benefits.

Set Up Named Callers for Advanced 1:1 Phone Support

If you have Advanced Support as part of your subscription, the Contract Manager and Software Coordinator will be Named Callers by default.

Other Named Callers must be set up by either the Contract Manager or the Software Coordinator **before** they will be able to access phone support. Named Callers MUST first **be set up as Users (** before they can be uplifted to this role.

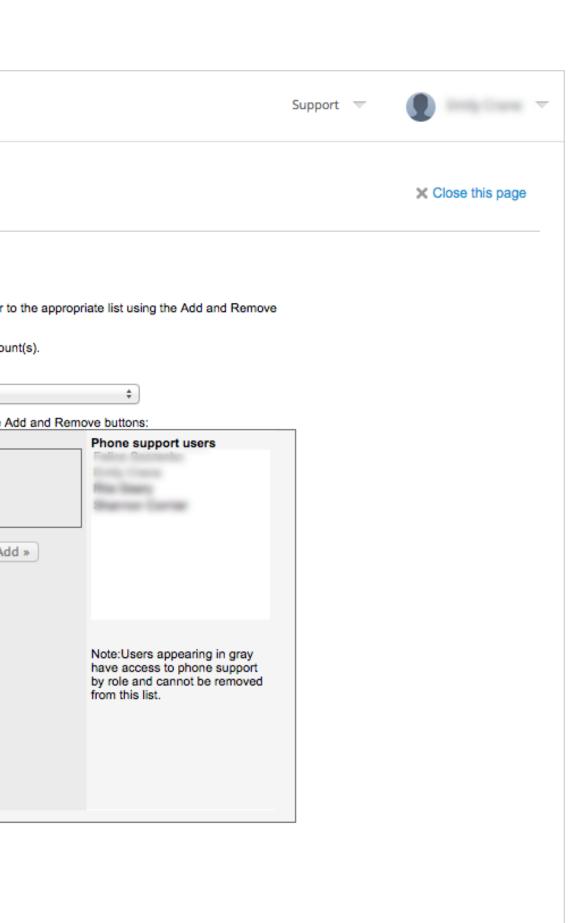
HOW TO SET UP A NAMED CALLER

- 1. Select Management in the top menu within Autodesk Account to view your Products & Services.
- 2. In the left navigation, click on **Users**.
- 3. Select Manage Phone Support in the Quick Links section.





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Support What Level of Support Do I Have?	-	Manage phone support users
Accessing Support Options Phone Support		To assign Phone Support User, select and move the user buttons.
Web Support <i>Create a Support Case</i> <i>View a Support Case</i> Set Up Reseller Permissions for Additional Support		Phone support has been purchased for the following account to manage: Account Autodesk – 2. Select and move users to the appropriate list using the Available users Selection details:
Ongoing Management	+	« Remove A
FAQ		Or search for the user by email
Additional Resources		address Enter email address >>
		Save Reset



- 4. To add a Named Caller, select the Account to manage subscription number in the drop-down, then select the Available user's name and click Add.
- 5. If a user is not listed, you can **search** for them by their email address. Be sure your user is already a Named User. Learn how **S**
- 6. Hit **Save** to lock in the updated phone support users list on the subscription.
- 7. Once this is done, you should receive a "Phone Support Users have been updated successfully" message. Users will also receive an email letting them know that their permissions have changed.

<u>NOTE</u>: It is best to also directly inform your Named Callers about the new Phone Support. While they will receive an email notification that their permissions have changed, it will not provide details around this new benefit.



BEST PRACTICE

for fastest resolution.

Confirm your Named Callers. Contract Managers and Software Coordinators should check back on the Products & Services page to confirm that all Named Callers are properly assigned within 24 hours. If they are not, log a support case









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Find Your Phone Support Information

If you are a designated phone support user (e.g., Named Caller), you will need your support telephone number and your Express Service ID to contact support by telephone.

TODESK. ACCOUNT	PROFILE	MANAGEMENT	Support 🤝	• ·	
PRODUCTS & SERVICES All - Products		Icts & Services s up & running. Learn how	Browse support & learning View my support cases Contact us	Search products & services	
- Services					
Product Updates		Cloud Credits		Shared Cloud Credits	
Trials	•	Create Case Vie	ew Cases		
	>	Select a Case	Туре		My Account
QUICK LINKS	> 🏊	Please provide all the requi	red information so we can q	r give us feedback by creating a web o uickly address your needs.	My Phone Support
		Product troubles	, database connectivity, finding	erals, performance tuning, settings, plugin g product usage/training resources	
		Software Do Downloading sof	ownloads tware, product enhancements	upgrades & service packs	For All Other Products: 866 681 4359 toll free +1 646 217 0167
				ployment, FLEXIm, system requirements,	, and My Supported Products
				es about serial numbers, product keys,	My Reseller Permissions
		Contracts Contract inquiries	s & Contact updates		Set View Permissions

TO FIND PHONE SUPPORT INFORMATION IN AUTODESK ACCOUNT:

- 1. Select **Management** in the top menu within Autodesk Account to view your Products & Services.
- 2. Hover over Support on the menu at the top and select "View my support cases" from the menu options.
- 3. View your **live support phone numbers** and Express Service ID in the My Phone Support Section, which you will find on the Create Case tab. If you have products or services with specific support lines, you will see multiple phone numbers listed, including the default number for all products.

<u>NOTE</u>: This information only appears for subscribers with phone support benefits.

More information: **Finding Your Phone** Support Information







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Web Support

All subscribers get Basic Support, which includes 1:1 Web Support where Users can open support requests and track cases through Autodesk Account. Web Support benefit details are listed by User within the Admin's user management area.

>		Products & Services 1	Benefits 4	Status	Edit Access
		Products & Services 2	Benefits 4	Status	Edit Access
Benefits (Benefits 4)			User I	nfo	
Product Updates	C Phone Se	upport	Rolei	(S)	
Web Support	Product (Downloads	• Cc	nact Mana ontract# ontract#	iger
Products (2 Added)			Emai	I	
Autodesk AutoCAD Services (6)					
Autodesk AutoCAD Services (6)					



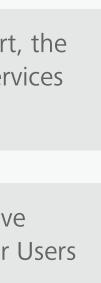
IMPORTANT

Be sure ALL Users have Web Support access. If users were not granted Web Support access when products and services were assigned, be sure to select Edit Access on the user row to assign the inherent subscription benefit.

NOTE: When a User is assigned Web Support, the User will get support for all products and services on the whole contract.

NOTE: Users will get a "your permissions have changed" email. Be proactive by letting your Users know what permissions you've granted.









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Web Support

🔥 AUT	ODESK. ACCOUNT	PROFILE	MAN	AGEMENT			Support 🤝
~^~o ^	PRODUCTS & SERVICES	All Produ				Browse support View my support Contact us	
	Services Product Updates Trials		Cloud Credi 100 individu	ts al and 0 shared credi	is remain	ing	
		-> 🔥 :	AutoCA 2 seats Downlo	Create Case		View Cases	
C	QUICK LINKS	- > 🕍 I	AutoCA Included	Select a			
				Please provide a Tec Prod file in Sof Dow Insi Prod inter Reg licen Con Cont Q Idea New Oth	All the re Annical uct trout nport/ex tware nloading callatic uct insta operabili gistrat stering a se gener ntracts ract inqu as & S features	iries & Contact up Suggestions or enhancement	on so we can oport porting, perip nectivity, find enhancemer ration ver, network

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rt T Search products & services Shared Cloud Credits My Cloud Credits My Cloud Credits blem, or give us feedback by creating a web case. e can quickly address your needs.

peripherals, performance tuning, settings, plugins, finding product usage/training resources

ments, upgrades & service packs

ork deployment, FLEXIm, system requirements, and

inquiries about serial numbers, product keys,

My Account My Phone Support

Express Service ID:

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For All Other Products: 866 681 4359 toll free +1 646 217 0167

All Phone Numbers My Supported Products

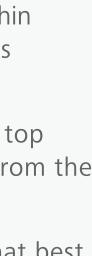
My Reseller Permissions

Set View Permissions

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CREATE A SUPPORT CASE

- 1. Select **Management** in the top menu within Autodesk Account to view your Products & Services.
- 2. Hover over Support on the menu at the top and select "View my support cases" from the menu options.
- 3.Select the **Case Type/Support Topic** that best describes your issue.







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Web Support

AUTODESK.	
Support Reques	sts
Welcome	
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🔆 Installation	& Configuration
* = required field Product Information * Product: Select	۱: ۲
* Release: Select	▼
* Language Installed:	- //
Attach Files Browse	Note: • File name: 80 characters max.
File:	Size
No files have been selected.	

4. Fill in the **required information** (marked with the *).

NOTE: This information will vary depending on the chosen topic. Please provide as much information as you can so that we can provide the best possible support.

5. Attach any files such as screen shots or log files that may help the support specialist by clicking the Browse button. Click the **Submit button** when your request is complete.

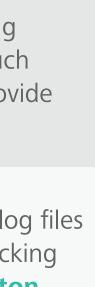


BEST PRACTICE

Support Users can create a default to eliminate the need to enter this information for each case. If there is a product for which you ask the most questions, create that as a default by checking off "Make these selections my default."

My Account Cancel Amazon Digital Svcs Inc-VCP Subs \$11 YES/100 YES/100 Help Topics Up & Ready Blog Installing Products Video Installation & Licensing FAQs Installation & Licensing Discussion Groups

MY PROFILE SIGN OUT









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Web Support

Before You Start:		
Get Ready for Setup	+	AUTODESK.
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Support	-	Welcome
What Level of Support Do I Have?		Create Case View Cases
Accessing Support Options		Casa Submittad
Phone Support		Case Submitted
Web Support Create a Support Case View a Support Case		Your Case has been successfully submitted. Case ID: 10973917.
Set Up Reseller Permissions for Additional Support		A Specialist will review your Case and contact you. All correspondence related to will be sent to
Ongoing Managemen	nt 🕇	Note: If you don't see an email in your inbox, be sure to check your junk/spam fo
FAQ		
Additional Resources		

MY PROFILE SIGN OUT My Account Amazon Digital Svcs Inc-VCP Subs \$11 YES/100 YES/107 your Case My Phone Support Express Service ID: lder. ALC: NO. 1 For All Other Products: 866 681 4359 toll free +1 646 217 0167 All Phone Numbers My Supported Products My Reseller Permissions

Set View Permission:

6. The case will immediately receive a **case ID** and an Autodesk Specialist will review the support case.

While the submitter may receive email correspondence, everyone on the contract can see all logged cases at any time, making the support solutions accessible for all, regardless of who submitted the case.

<u>NOTE</u>: If you have **phone support** as part of your product or Advanced Support benefits, you should also see phone support contact numbers in the right margin of this same page.

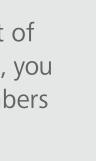


BEST PRACTICE

Keep information current and users aware. Contract Managers and Software Coordinators should always be sure their Autodesk Account profile, contact information and email address are kept up to date and that users know who the Contract Manager and Software Coordinator are for their products.











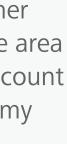
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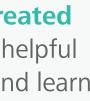
Web Support

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	w only cases I created		Case Status:	•	
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Search Case Type: All Keyword / Ca	w only cases I created	· · · · · · · · · · · · · · · · · · ·	All		Export Table
Search Case Type: All Keyword / Ca	w only cases I created	· · · · · · · · · · · · · · · · · · ·	All		Export Table
Search Case Type: All Keyword / Ca Show 10	w only cases I created ase ID:	Tase Type:	All Select Columns > Date Created:	▼ Last Updated:	Case Status:

VIEW A SUPPORT CASE

- 1. Select the **View Cases** tab on the Customer Service & Support screen. (This is the same area the case was created in your Autodesk Account Management page Support menu > View my support cases.)
- 2. Search using the date you submitted the request, a keyword, or the Case ID. Case information is contained in the confirmation email you receive after submitting a request.
- 3. View all cases or only the cases you created by checking the box. This sort view is a helpful feature that allows users to filter quickly and learn from other successfully resolved cases.
- 4. Click **Search** to see the results below.
- 5. Click on the **Case ID number** to view case details.





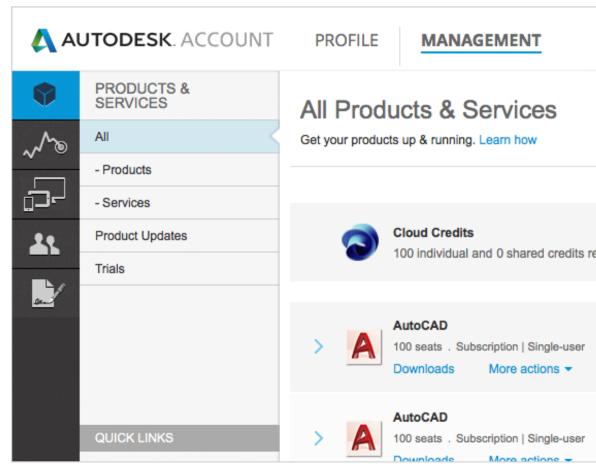


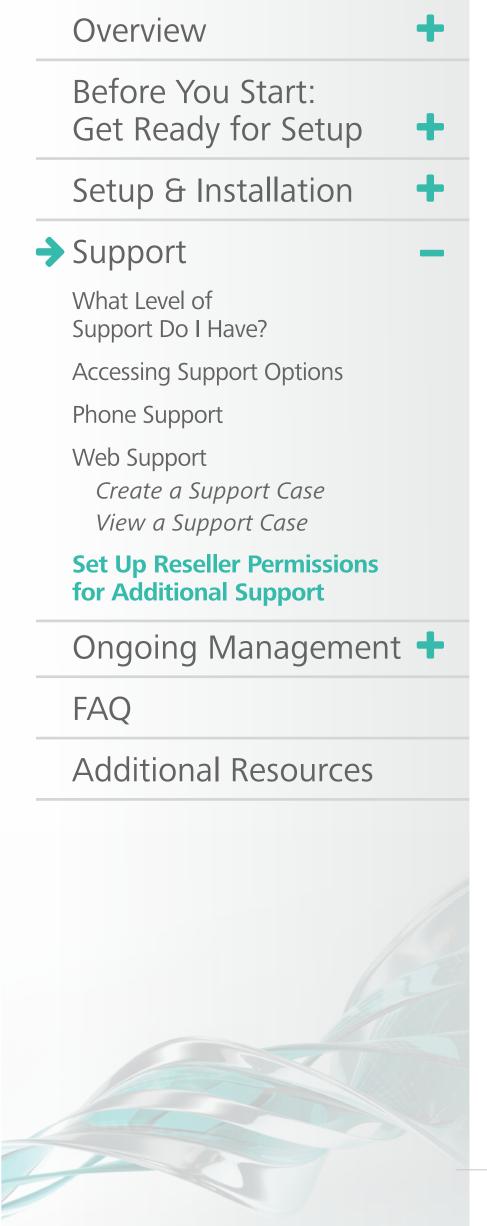


Set Up Reseller Permissions for Additional Support

By default, resellers are not able to view associated cases with subscription contracts.

However, as the Contract Manager or Software Coordinator on a subscription contract, you can change this default access. This allows your Reseller to have read-only access to your company's support requests or cases (connected to the contracts you have with them) and helps them provide additional solutions or training for your users.





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	Browse support & learning View my support cases Contact us	Search	n products & services
remaininę	9		Shared Cloud Credits My Cloud Credits



BEST PRACTICE

Set Up Resellers. Contract Managers and Software Coordinators should give resellers permission to view their support cases so (1) the reseller is made aware of such cases and (2) they can help you get problems resolved quickly so your users can get back to work.

It's also an opportunity for the reseller to learn how to troubleshoot the problem if it comes up in the future. Be sure to let your reseller know you've chosen for them to see your cases so they can best support you.

TO SET YOUR RESELLER VIEWING PERMISSIONS:

- 1. Select Management to view your Products & Services in your Autodesk Account.
- 2. Hover over Support on the menu at the top and select "View my support cases" from the menu options.











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Set Up Reseller Permissions for Additional Support

Select a C	ase Type	My Account
	uest assistance, report a problem, or give us feedback by creating a web case. he required information so we can quickly address your needs.	Rappy Chain Structures 1122082788
🕞 Techr	ical Product Support	My Phone Support
	troubleshooting, bug reporting, peripherals, performance tuning, settings, plugins, ort/export, database connectivity, finding product usage/training resources	Express Service ID:
Softw	are Downloads	For All Other Products:
Downloa	ading software, product enhancements, upgrades & service packs	866 681 4359 toll free +1 646 217 0167
Instal	ation & Configuration	All Phone Numbers
	installation, license server, network deployment, FLEXIm, system requirements, and rability with the O/S	My Supported Products
	tration & Activation	My Reseller Permission
Registe	ring and activating your product; inquiries about serial numbers, product keys, generation & reporting	Set View Permissions
Contr	acts	
Contrac	t inquiries & Contact updates	

ou may allow your	Resellers to view y	our cases but	they are unable	e to comment on
	ments. If you chang Reseller will have			
		Linus Conno	Madified By	Last Modified
Reseller	Contract No.	View Cases	Modified By	Last Moullieu
Reseller	Contract No.	Yes *	Api	2/25/2015 1:13 PM

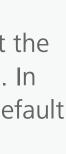
My Account

utodesk-CSC 1001-02411

ly Reseller Permissions

Set View Permissions

- 3. Click the **Set View Permissions** link in the My Reseller Permissions box.
- 4. Locate the contract and reseller and select the desired option in the View Cases column. In most cases, this will mean changing the default "No" to "Yes."
- 5. When finished, click the **Save Changes** button.







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- Ongoing Management Managing Billing & Orders
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ONGOING MANAGEMENT

Proactive management of your subscription means fewer delays and downtime for your team. In addition to familiarizing yourself with this section, we suggest you review our list of **Best Practices** for managing your subscription at the beginning of this eBook.

The following pages describe how to manage your contracts, keep tabs on Cloud Service usage, renew promptly and more. Let's first take a look at how to manage contracts and orders.

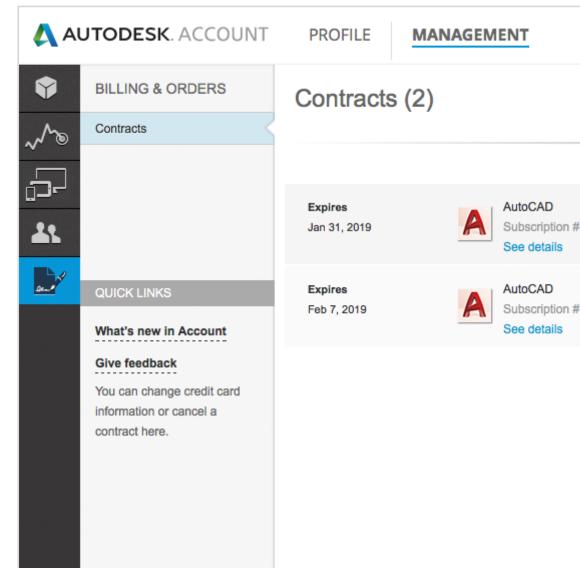






Managing Billing & Orders

Contract Managers and Software Coordinators can easily view contract and order details in Autodesk Account.



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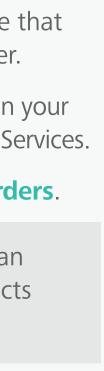
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				3-year
#				

Take a quick look when you sign in to ensure that subscription details match the expected order.

- 1. Select **Management** in the top menu within your Autodesk Account to view your Products & Services.
- 2. In the left navigation, click on **Billing & Orders**.

NOTE: You can also get here from within an expanded product "drawer" on the Products & Services page.

- 3. Here you see a master list of all your **contracts**, including expiration date, etc.
- 4. Click on **"See details"** to display the contract details.









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Additional Resources

Managing Billing & Orders

AUTC	DESK. ACCOL	JNT PROFILE	MANAGEMENT		Support 🔝	•
	Contract #	ŧ				×
	Products Seats Support Level 2 4 Basic					
	Туре	1-year (Renewal)		Cloud Cred	it Usage	
,	Start Date	Feb 16, 2016		No Clo	ud Credits Purchased	Get Cloud Credits
	End Date Expires Mar 15, 2016			Access your cloud services T	ry and learn more	
	Contract Manager					
	Company	Company Ddwstest 1219 4040 Civic Center Dr San Rafael, CA, United States 94903-4150				
F	Products and Se	ervices				Export
	Product	Serial / Key		Seats	License Type	Reseller
~	AutoCAD 2016	561		2	Networked	
		Language: No License Type:	n-Language Specific Standalone		Software Coordinator: Status: Active	

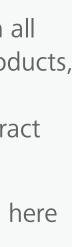
5. The **Contract Details screen** will contain all critical contract information, including products, number of seats, support level (basic or advanced), start and end dates, and Contract Manager information.

You can even get more cloud credits from here if needed.

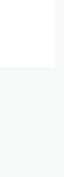
6. Lower in the screen are all the associated product and service details for the contract, including reseller details, serial numbers and product keys.

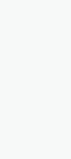
This is also where the assigned **Software** Coordinator's name can be found.

7. You can also click the **Export** button to create a comma delimited CSV file.





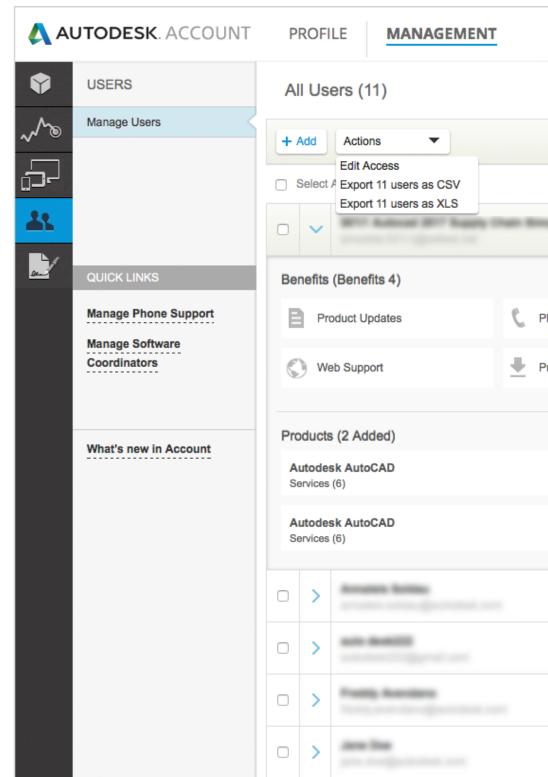






User Management

You can continue to manage all user information within the Manage Users page of your Autodesk Account.



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FAQ

Additional Resources

	Supp	ort 🤝			~
Q Search name or email					
	s	ort by: Fire	st name (A	-Z) 🔻	Filters
					11 results
-	Products & Services 2	Benefits Status 4			
		User I	nfo		
hone Supp	port	Role	(s)		
roduct Dov	unloade		ract Mana	ger	
	whidaus	Contract# Contract#			
		Emai	I		
	Products & Services	Benefits	Status	E 12 A	
	1	1	 ✓ 	Edit Access	8
	Products & Services 2	Benefits 1	Status	Edit Access	0
	Products & Services 2	Benefits 3	Status	Edit Access	
	Products & Services 2	Benefits 1	Status	Edit Access	8

Search, sort, bulk select, and advanced filter features are great tools for busy Admins. Here you can:

- a. Sort by name
- b. Check **user info** and **status**
- c. Search for users by name or email
- d. Access user product and benefit information
- e. Edit access permissions for individual users or multiple users selected at once
- f. Filter all user information with advanced multiple select categories. Filter users by product(s), service(s), benefit(s), contract(s), status (pending or accepted) and role
- g. Export user information as CSV and XLS files



BEST PRACTICE

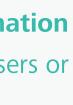
Establish protocols. We recommend that Contract Managers and Software Coordinators establish internal protocols and processes around requests to change roles and users, including removing users that are no longer affiliated with the company.

More information:

User Management Video Tutorial





















Administrative Reports

All users have access to some level of reporting within their Autodesk Account. Simply go to **Management** in the top menu and click on the **Reporting** link in the left navigation menu.

AUTODESK. ACCOUNT	PROFILE MANAGEMENT		
REPORTING	Cloud Services Usage		
Cloud Services Usage			
- By Users	Individual Cloud Credits		
2	Individual Usage0 hereAssigned users get 100Cloud Credcloud credits eachCloud Cred		
QUICK LINKS	Shared Cloud Credits		
What's new in Account	Contract # 3-year (Renewal) No Clo 3-Year Feb 7, 2019		
Give feedback You can change credit card information or cancel a contract here.	Usage by Service		

Before You Start: Get Ready for Setup + Setup & Installation + ╉ Support Ongoing Management — Managing Billing & Orders User Management **Administrative Reports**

FAQ

Additional Resources

	Support 🤝	•			
	View	: My Us	age	All Usage	
redits Used	0 🙎 Consuming				
		Sort by	Most	Recent -	
Cloud Credits Purchased			Get Clou	d Credits	
No Cloud Credits Purch	nased				
your cloud services Try a	and learn more				

At this time, reporting covers primarily **Cloud Service usage**. We will continue to integrate more reporting functionality into Autodesk Account over time.

Users can see their individual cloud credit usage. It's the 100 allotted cloud credits that every user receives.

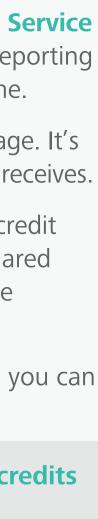
Admins can see their own individual cloud credit usage as well as the shared cloud credits. Shared cloud credits are the credits purchased by the company and connected to a contract.

Admins can also see cloud credits by user so you can assign additional credits appropriately.

<u>NOTE</u>: You can initiate getting more **cloud credits** within the Reporting screen.











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FAQ

Find answers to common questions about subscription setup, installation and maintenance. For additional information, look for links to related sections within this guide and articles on the Autodesk Knowledge Network (AKN).







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Additional Resources

Several "More Information" links have been integrated throughout the sections of this guide to support deeper learning in the associated areas.

To further enrich your knowledge of Autodesk software and services, we encourage you to take full advantage of the integrated support for self-help and self-paced learning opportunities through the **Autodesk Knowledge Network (AKN) Z**.

The following links will help get you started:

USER ID/ACCOUNT INFORMATION	Managing \
Overview 🛛	Support: M
FAQ and Video Tour	for Subscri
USER MANAGEMENT INFORMATION Overview	<u>Update Bill</u> Subscriptio

FAQ 🛛



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g Your Subscription Contracts

Managing Technical Support cription Products & Services

Billing Information for Your tion





