

Manual for Contract Managers

Autodesk

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For who:

This manual is primarily meant for **Contract Managers and Software Coordinators**.

1 Contract manager, Software-Coordinator & Users,

When buying a subscription license, you need to know there are three roles, with different roles and capabilities. (Figure 1)

- | | |
|-------------------------|--|
| 1. Contract manager | All rights , permissions, and privileges for the subscribed Autodesk subscription contract. |
| 2. Software Coordinator | Assigning Software and Users |
| 3. User | Software user |

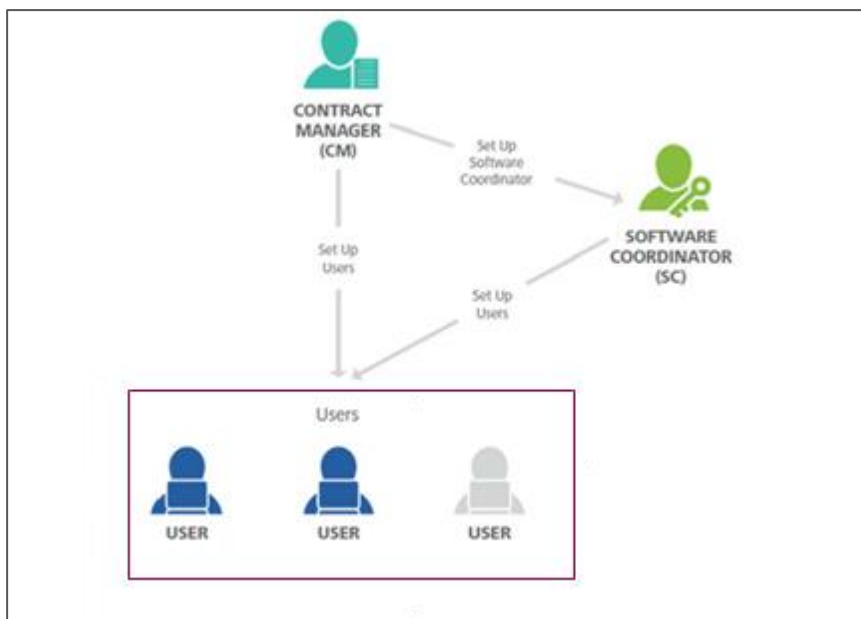


Figure 1: Roles Subscription license Autodesk

1.1 Contract manager

The contract manager is the Main contact person when buying a subscription at Autodesk. Usually the person who acquires the subscription, automatically becomes the contract manager of that contract. For this, an Autodesk Account is required. (See [Chapter 2](#))

The contract managers is normally also the software coordinator within your company. (More about this in [Chapter 1.2](#))

If someone else in the company should be the contract manager, then please let Cadac know. A Cadac-employee will take care of your request and will ensure that the contract manager is changed at Autodesk.

Rights, of a contract manager.

The contract manager has all Rights, permissions and privileges for the subscribed Autodesk subscription contract, like:

- The contract manager is the contact person of your company with Autodesk. He/She will receive all email communications from Autodesk. The welcome mail with all the details about how to install the new software and users, announcements of contract extensions and all other mails of Autodesk
- The contract manager has permission to assign a software coordinator and users of the software.
- The contract manager has access to billing information, contract details etc. in his or her Autodesk account.
- The contract manager assigns licenses and/or Cloud credits to users
- Receives all emails from new releases of upgrades from Autodesk products.

Note: For a complete overview of the capabilities see [Chapter 1.4 Roles and Capabilities Matrix](#)

1.2 Software coordinator

By default, the contract manager (§ 1.1) is also the Software Coordinator. However, you can also choose to make this someone else within the company. The Software coordinator needs to be assigned by the contract manager ([See chapter 3.6 Assigning a software Coordinator](#)). A Software Coordinator also needs an Autodesk Account. (See [Chapter 2](#))

Rights, of a Software Coordinator.

The software Coordinator also has multiple rights, permissions and privileges at the subscribed subscription contract with Autodesk, such as:

- The software coordinator assigns licenses and /or cloud credits to users
- Receives all mails for new releases and or upgrades of Autodesk products.

Note: For a complete overview of the capabilities see [Chapter 1.4 Roles and Capabilities Matrix](#)

1.3 User




Users are assigned by either the contract manager or the software Coordinator. A user is the one who actually is going to work with the software which is installed on his/her PC.

A user needs an Autodesk Account at all times. ([See Chapter 2](#))

Note: For a complete overview of the capabilities see [Chapter 1.4 Roles and Capabilities Matrix](#)

1.4 Roles and capabilities

In Figure 2 down below, there is a schematic representation of the roles and Capabilities.

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.			
	 CONTRACT MANAGER (CM) ADMIN ROLE	 SOFTWARE COORDINATOR (SC) ADMIN ROLE	 USER (U) ALSO CALLED A "NAMED USER"
ROLE ORIGIN <i>How does each role come to be?</i>	Subscriber (purchaser of the subscription)	If not assigned, capabilities default to CM	Added by CM or SC
CAPABILITY			
Subscribes to products and services	●		
Main point of contact for your Autodesk subscription contract	●		
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, services 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)***	● (NC BY DEFAULT)	● (NC BY DEFAULT)	

*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.

Figure 2: Roles and capabilities Matrix

2 Autodesk Account

The Autodesk Account (sometimes also called ID Autodesk) is essential to access various Autodesk Websites, products and services. This can all be done with a single login. This chapter describes:

- [How to make an Autodesk account](#)
- [An existing Autodesk Account](#)
- [Different possible views Autodesk Account](#)

Note: The Autodesk Account is not necessarily the same as your Cadac account. You need to separately register and log in at Cadac services.

2.1 How to make an Autodesk Account

To Make an Autodesk Account please go to:

- <https://accounts.autodesk.com/register>,
- In the next screen (Figure 3) fill in your name, email address and password and click on **“Create Account”**

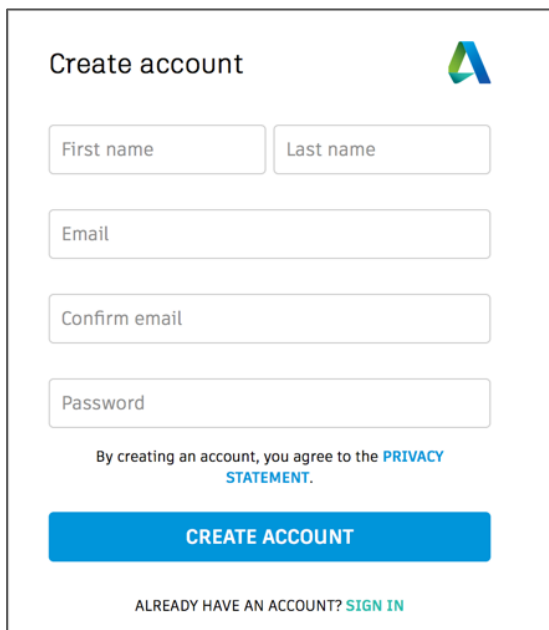
The image shows a screenshot of the Autodesk 'Create account' web form. At the top left, it says 'Create account' next to the Autodesk 'A' logo. The form contains several input fields: 'First name' and 'Last name' (side-by-side), 'Email', 'Confirm email', and 'Password'. Below these fields, there is a line of text: 'By creating an account, you agree to the [PRIVACY STATEMENT](#).' At the bottom of the form is a large blue button labeled 'CREATE ACCOUNT'. Below the button, there is a link that says 'ALREADY HAVE AN ACCOUNT? [SIGN IN](#)'.

Figure 3: Account log in screen

You will receive by mail a confirmation email. See figure below (Figure 4).

- In the mail click on **"Verify Email"** to activate your account.

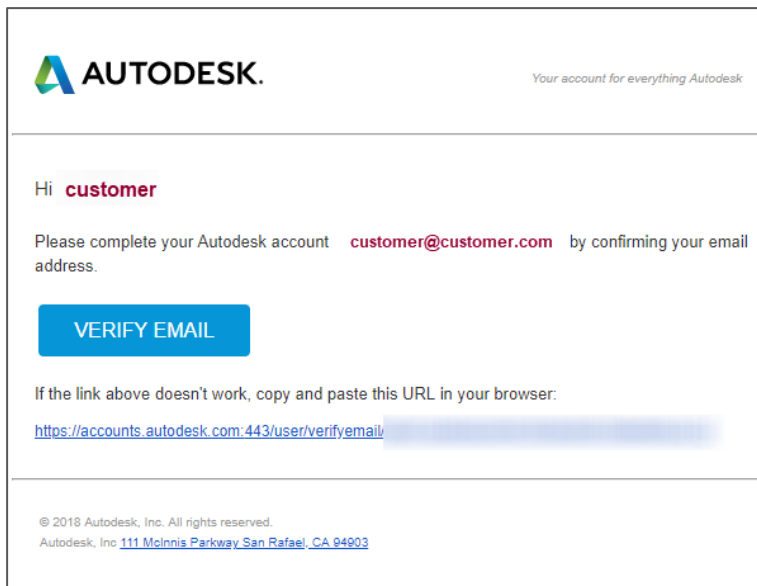


Figure 4: Verification Email

2.2 An existing Autodesk Account

Already got an account, but you forgot your password.

- Go to <https://accounts.autodesk.com/>
- Enter your email address and click **"Next"**,
- In the next screen, (see Figure 5) click **"forgot?"**
- You are able to reset your password via a received mail.

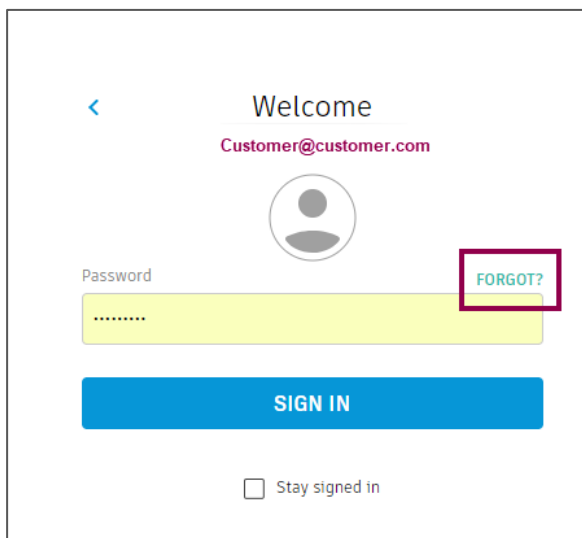


Figure 5: Login screen Autodesk Account

2.3 Different possible views Autodesk Account.

After logging in depending on your role, ([see Chapter 1](#)) you will arrive at one of the following home pages. It is recognizable at a glance what role you have. If You have four (or five) tabs to the left on your management page (Figure 6), then you are logged in with a Contract manager or Software Coordinator account (Figure 7), you will see only two tabs then you are if User logged in (Figure 8)



Figure 6: Management Page, Autodesk Account

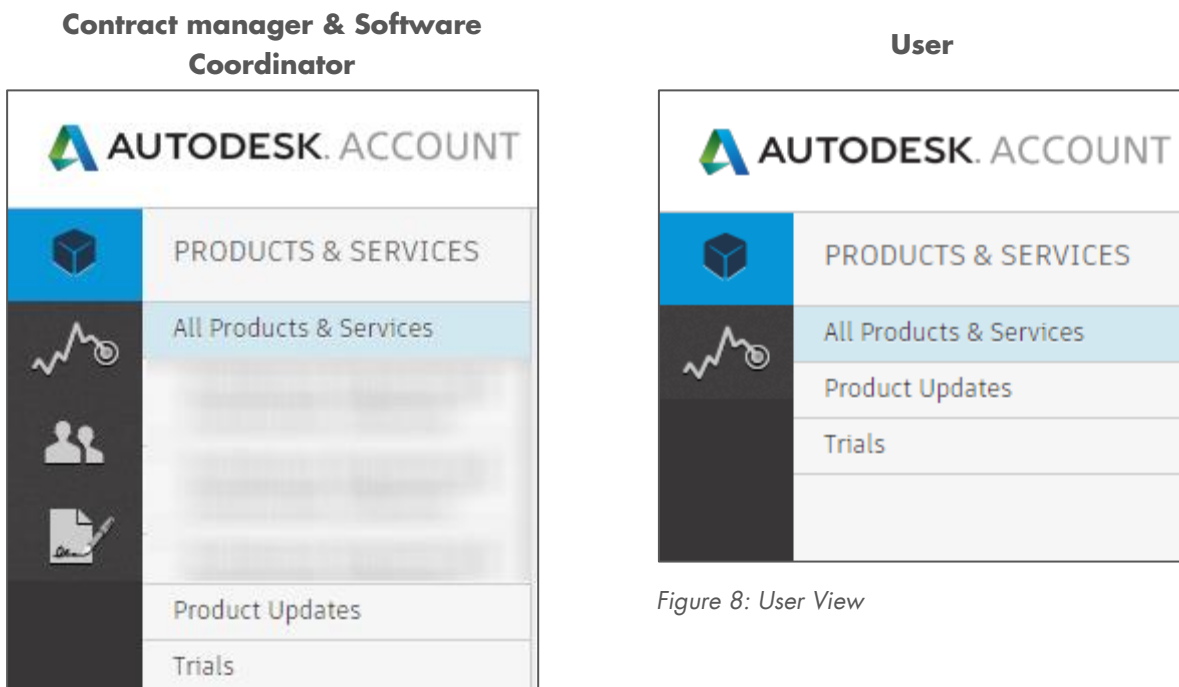


Figure 8: User View

Figure 7: Contract manager & software coordinator view (blurred = customer specific)

3 Setup and installation process in 10 steps

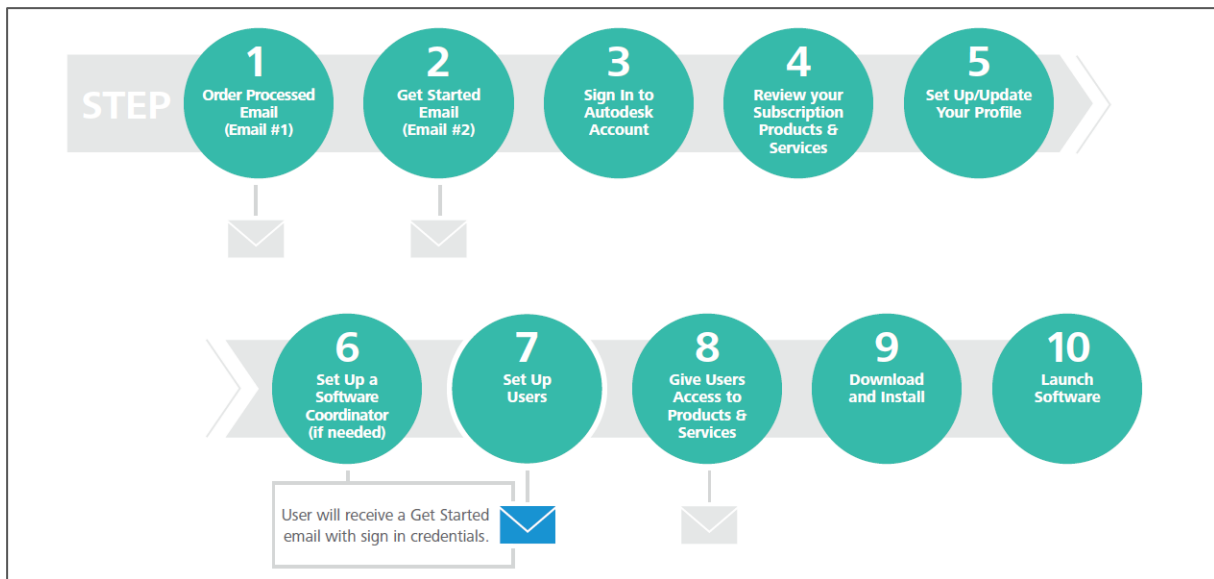


Figure 9: 10 steps, setup and installation process

3.1 Order Processed (Email #1)

The first mail shows that the order has been received by Autodesk. This mail concerns only a confirmation of the order, not that the license(s) is/are already available.

3.2 Getting Started Email (Email #2)

The second mail (Figure 9Figure 10) of Autodesk concerns the mail in which announced that the license is available in the account of the contract manager.

- Click on **“Sign in to Autodesk Account”**

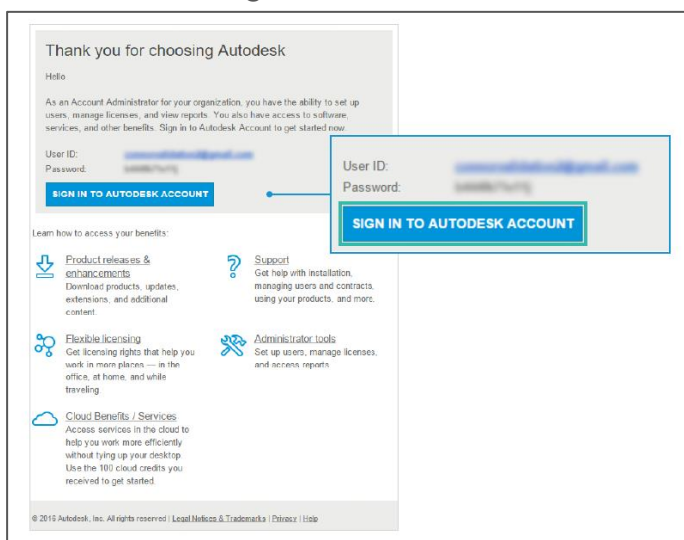


Figure 10: Getting started email

3.3 Sign in at Autodesk Account

Sign in to your Autodesk account. To do this, use the data and the account that is also in the "start-email (§ 3.2)"

- Fill in your Email address and click on **"Next"**
- Fill in your password and click on **"Sign in"**

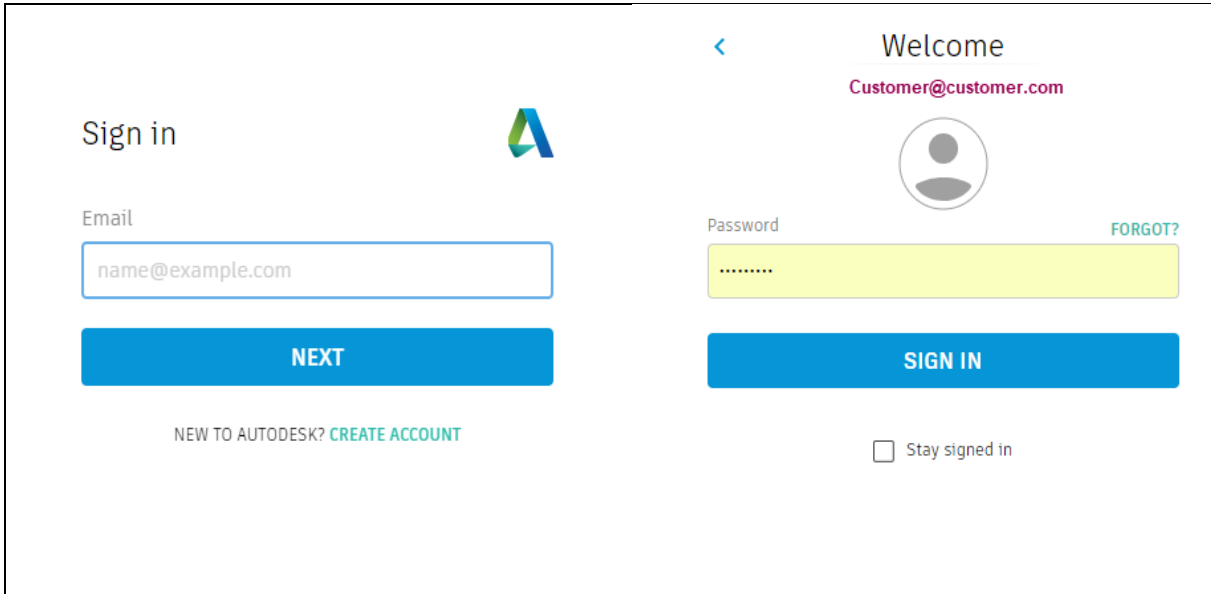
The image shows the Autodesk Account sign-in interface. On the left, under the heading "Sign in", there is an email input field containing "name@example.com" and a blue "NEXT" button. Below this is a link "NEW TO AUTODESK? CREATE ACCOUNT". On the right, under the heading "Welcome" and the email "Customer@customer.com", there is a password input field with masked characters and a blue "SIGN IN" button. A "FORGOT?" link is next to the password field. At the bottom right, there is a checkbox labeled "Stay signed in". The Autodesk logo is centered at the top.

Figure 11: Login screen Autodesk Account

3.4 Review Subscription, products & services

Have a look in your Autodesk account to see where everything is, see Figure 12. At the top, you will see two tabs: Profile & management

By default you will arrive at the "management" tab, here you will find all your Autodesk contracts/products and services.

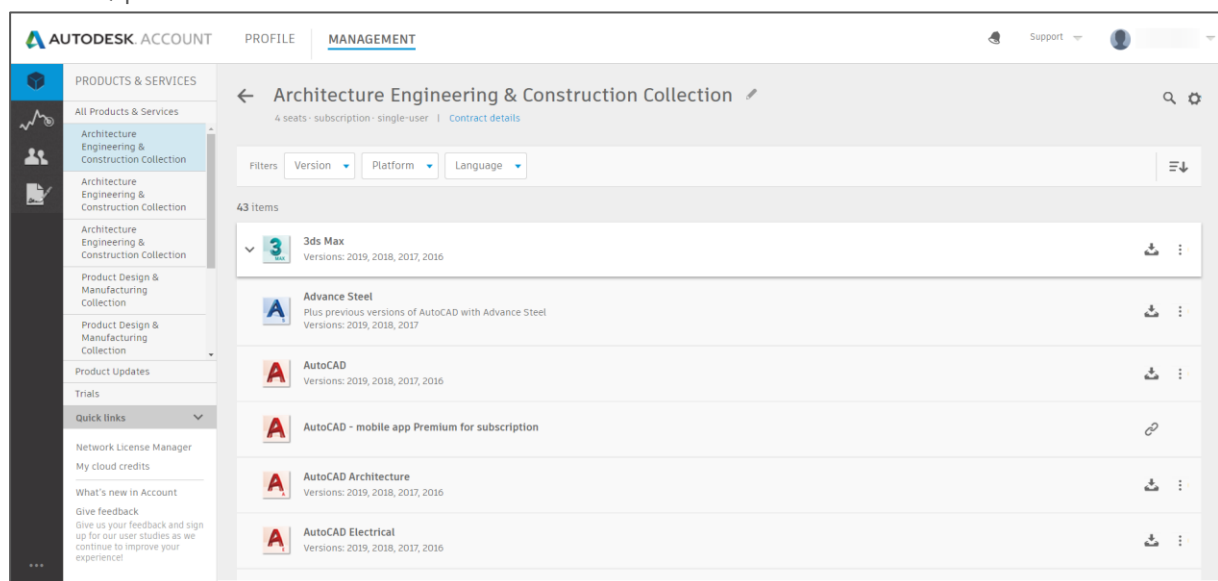


Figure 12: Autodesk Management, overview page

3.5 Changing & updating the profile

At the top of your Autodesk account you will see 2 tabs (Profile & management).

Under the tab **"profile"** (Figure 13) you can edit the following data.

- My Profile: (name, telephone number, screen name, alternative email etc.)
- Security Settings (change user name, email address, password, 2 step verification etc)
- Linked Accounts (Connections with Facebook, Google +, Twitter etc.)
- Preferences (Language, communication, notifications)

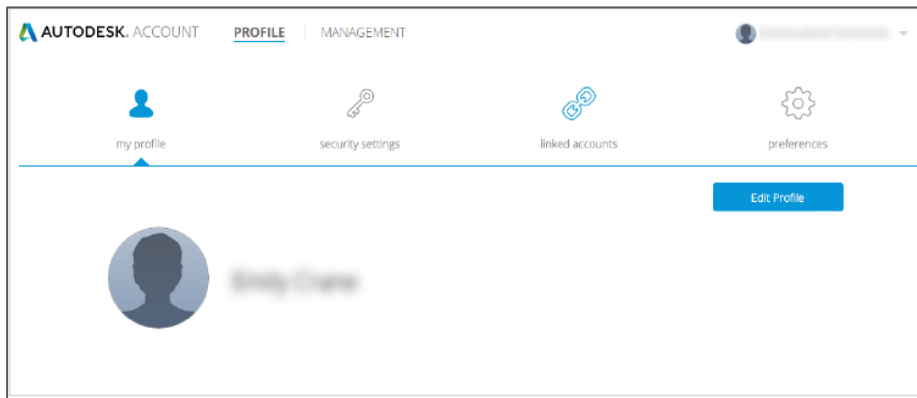


Figure 13: Profile page

3.6 Assigning a Software Coordinator (optional)

If desired, a Software Coordinator (for more info. see [Chapter 1.2](#)) can be assigned. A software Coordinator can be assigned per contract or by serial number.

Your best option is to contact Cadac via our service desk

Call +31 88 9322 333 or leave a message at <https://www.cadac.store/nl/service-contact/>

You can address which to which contract or serial number you want to assign a software coordinator.


3.7 Adding Users

In order to use the software, it needs to be assigned to users¹. These users need to be known to you or they can be created in the Autodesk account portal of the contract manager. Either way the steps are the same.

Make an inventory of all the users that you want to assign which already have an Autodesk account. Collect these data from them:

- First and last name
- Email address

To add the users, (Figure 14):

- Click on the **“management”** tab on the user symbol .
- Go to **“+ Add”** and fill in the required info in the next pop-up screen.
- Check the **“I’d like to add access to the user(s) now”** box and save via **“Save & continue”**

The user will receive an activation mail with the message that a license is assigned to him/her.

Note. Each user needs a private Autodesk account, so that the license also end up in his/her own account. Where it is visible to download and install.

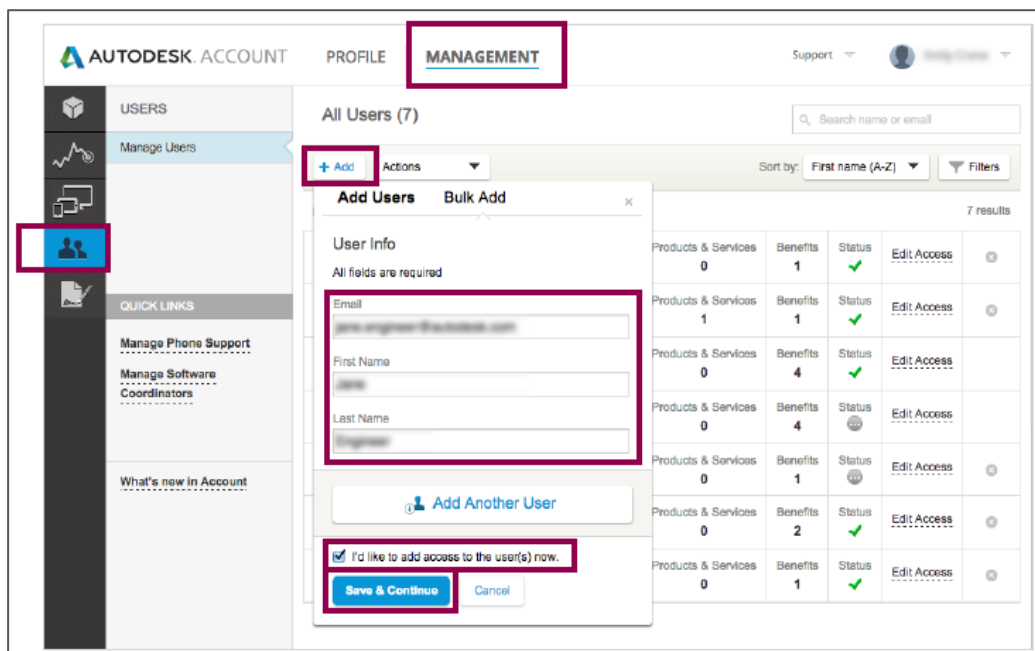


Figure 14: Adding users in the Autodesk Account

¹ Reeds bestaande users kunnen al inloggen op hun Autodesk Account. Maar zien alleen licenties wanneer deze zijn toegewezen door de contractmanager.

3.8 User access

To give users access to the products and Services that they are authorized to use, they need to be assigned to the right license(s).

When creating the users (§ 3.7) you checked the **"I'd like to add access to the user (s) now"** box, you will be taken to the following screen (Figure 15).

If you want to give users access afterwards you need to click on **"Edit Access"** next to the respective user.

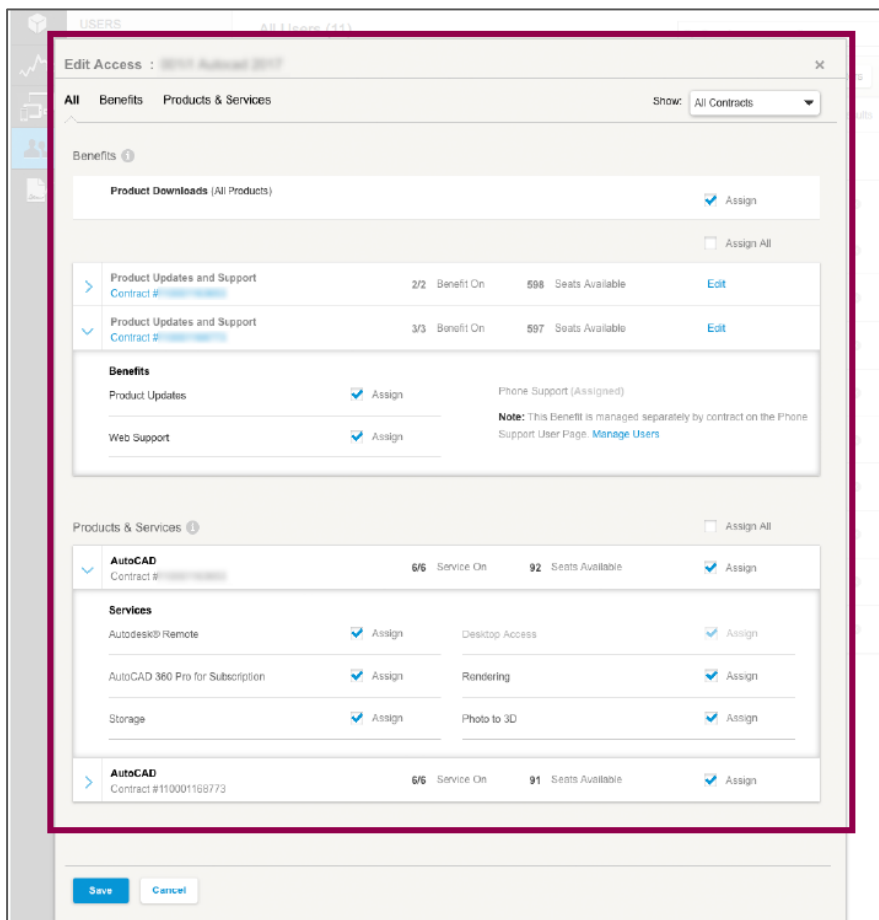


Figure 15: Edit Access Screen

You can assign benefits and/or services (Figure 16) per license. By default, it is assigned to **"Assign all"**.

The screenshot shows the 'Edit Access' window for 'All Users (11)'. The window has tabs for 'All', 'Benefits', and 'Products & Services'. The 'Benefits' tab is active, showing a list of benefits with 'Assign' buttons. The 'Products & Services' tab is also visible, showing a list of products and services with 'Assign' buttons. Red boxes highlight the 'Assign' buttons for 'Product Downloads', 'Product Updates', 'Web Support', 'AutoCAD', and the 'Services' section.

Benefit	Assign
Product Downloads (All Products)	<input checked="" type="checkbox"/>
Product Updates and Support (Contract #110001168773)	<input checked="" type="checkbox"/>
Product Updates and Support (Contract #110001168773)	<input checked="" type="checkbox"/>
Product Updates	<input checked="" type="checkbox"/>
Web Support	<input checked="" type="checkbox"/>

Product/Service	Assign
AutoCAD (Contract #110001168773)	<input checked="" type="checkbox"/>
Autodesk Remote	<input checked="" type="checkbox"/>
AutoCAD 360 Pro for Subscription	<input checked="" type="checkbox"/>
Storage	<input checked="" type="checkbox"/>
Desktop Access	<input checked="" type="checkbox"/>
Rendering	<input checked="" type="checkbox"/>
Photo to 3D	<input checked="" type="checkbox"/>
AutoCAD (Contract #110001168773)	<input checked="" type="checkbox"/>

Figure 16: Assign Benefits, Products & Services

Note. (Don't forget to save after Assigning).

3.9 Download & Install

In the Autodesk account of an **Assigned user**, the software / license is visible. This user can now download the software.

- Click the download icon (see Figure 17), at the specific software you want to download.

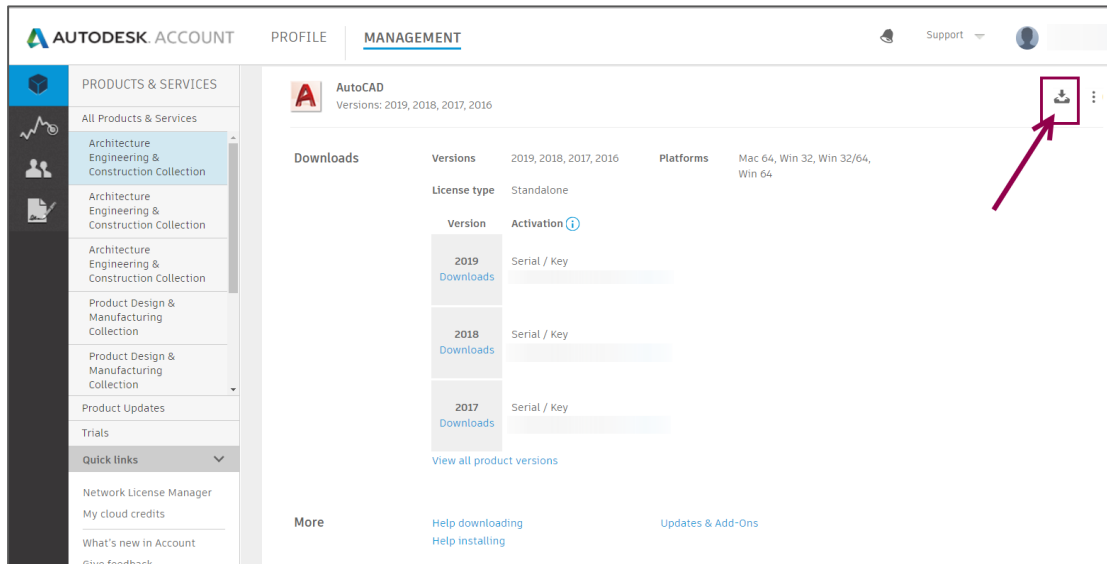


Figure 17: Download screen Autodesk Account

Here you will see a new pop-up screen (see Figure 18),

- Choose the right version, platform and language.
- When clicking **“View all”** you are prompted multiple download options. Select the one you desire.
- [Install now](#) (Download and install direct option)
- [Download now](#) (only download, not yet install).
- [Browser Download](#).

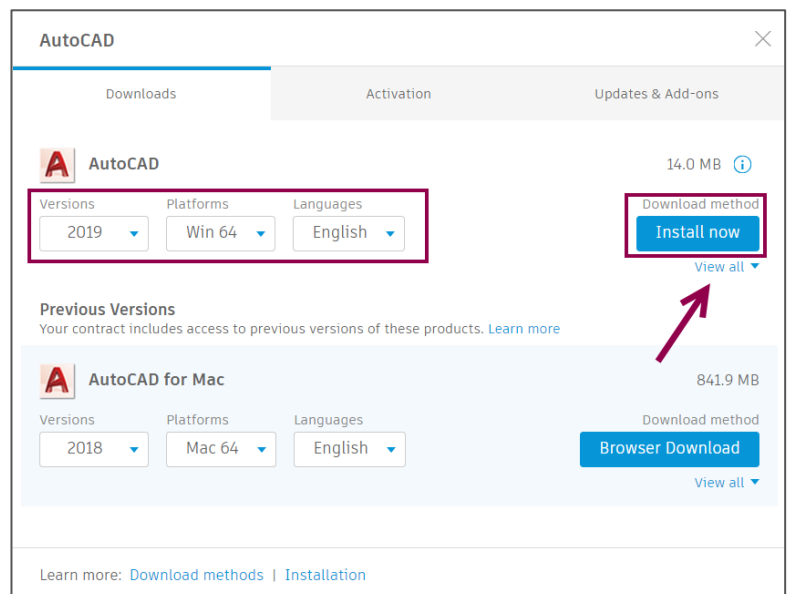


Figure 18: Download pop-up screen

Depending on the download method, you are able to install the software that you just downloaded.

Installation assistance Cadac

If you also bought installation assistance from Cadac, Cadac will perform the installation and activation for you.

Note. Downloading the software is still your responsibility.

3.10 Activate your Software

Note. Before a User can activate the software, it is a requirement that the user is added and he/she is able to log in ([See chapter 2 Autodesk Account](#)).

After a user has downloaded and installed the software, this still needs to be activated.

The first time you start the software, you are asked if the user is a single user or a multi user. (Figure 19)

- If you subscribed to a single user license, the user needs to sign up with his Autodesk Account. Due to this a verification takes place, if the software can be used by that specific User.

Note. An internet connection is required.

- If you have a Multi-user license, you will be asked to specify the license server on which the license file is installed.
- You can also manually enter a serial number when clicking the blue link **“Enter a serial number”**. (also see [Chapter 4: Finding your serial number and product key](#))

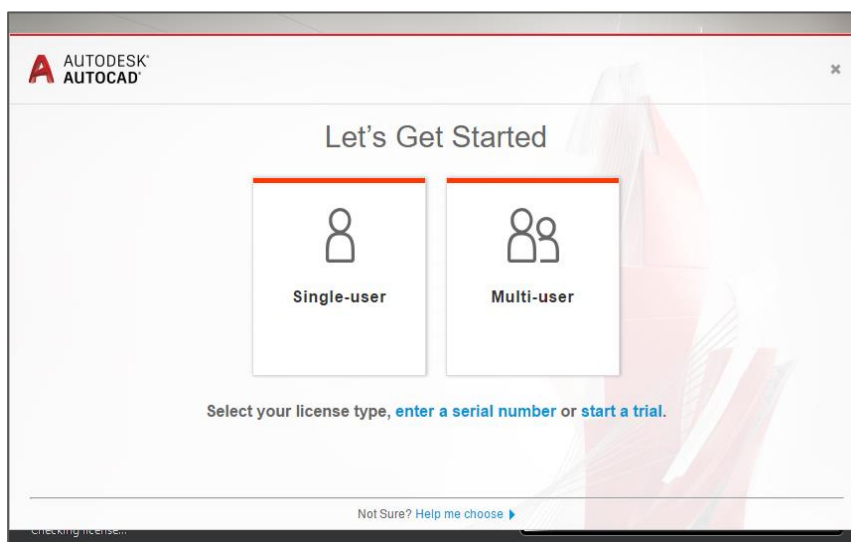


Figure 19: Example AutoCAD Startup

Installation assistance Cadac

If you also bought installation assistance from Cadac, Cadac will perform the installation and activation for you.

Note. Downloading the software is still your responsibility.

4 Finding your serial number and product key

In some cases, a user needs to manually activate the software. For this, he needs the serial number and the product key. The user will find this in his/her personal Autodesk Account.

- Click on the **“Management”** tab
- Click on the respective product (in the example below **“AutoCAD”** ,Figure 20)
- Click on the folding arrow

You will see a serial number and a product key for the respective version you wish to activate.

The screenshot shows the Autodesk Account Management page for AutoCAD. The left sidebar contains a list of products and services, with 'AutoCAD' selected. The main content area displays the 'Management' tab for AutoCAD, showing versions 2019, 2018, 2017, and 2016. The 2019 version is highlighted, and its details are shown, including the license type (Standalone), platforms (Mac 64, Win 32, Win 32/64, Win 64), and a table of activation information. The table has columns for Version, Activation, and Serial / Key. The 2019 version's activation information is expanded, showing the serial number '398-' and the product key '001K1, 3 more'. Red arrows point to the 'Management' tab, the 'AutoCAD' product, the folding arrow, and the serial number and product key fields.

Version	Activation	Serial / Key
2019	Serial / Key	398- / 001K1, 3 more
2018	Serial / Key	398- / 00131, 3 more
2017	Serial / Key	398- / 00111, 3 more

Figure 20: Serial number and product key

5 Error: Contact your administrator to request permission to use this product.

If a user wishes to start the software it could happen that he/she receives the error: “contact your administrator to request permission to use this product”. If this happens the contract manager should check the following two options.

1. The cause problem can be that the user signs in with a wrong or misspelled Autodesk ID. Autodesk handles a high accuracy in using the correct spelled/written email address. If this is the case, the user clicks on **“Sign in as a different user”**. (Figure 21)

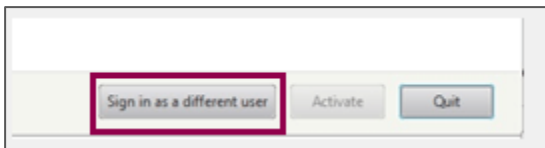


Figure 21: Sign in as a different user

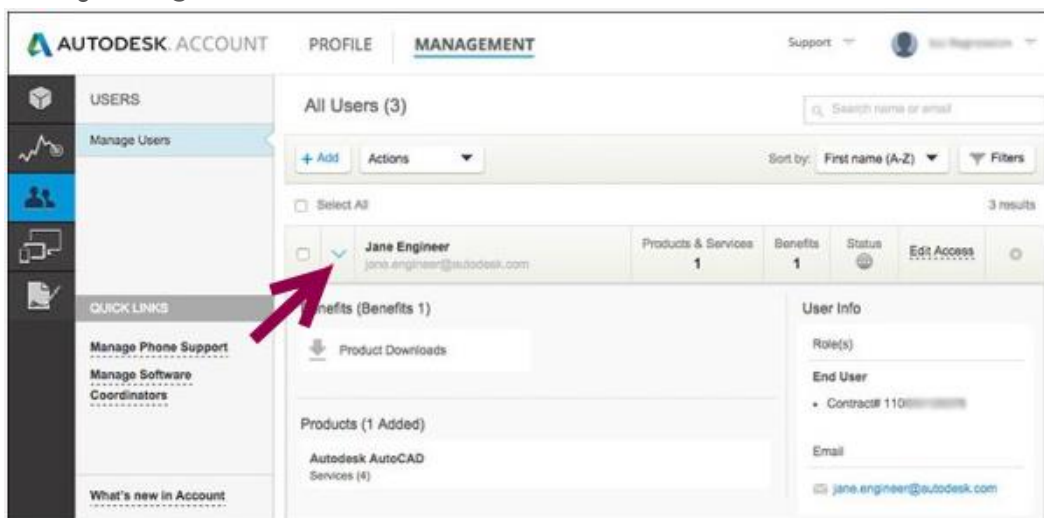
2. If option 1 is not the cause of the problem, and the user has signed in with the correct Autodesk ID. Cadac advises to contact the administrator (this is the contract manager or software coordinator, which is registered at Autodesk).

The **contract manager** or **Software Coordinator** should execute the following steps:

- Sign in at <https://accounts.autodesk.com/>
- On the left click on the **“Users”** icon
- If the User is not visible here, he/she needs to be added. Click on **“+ Add”** and fill in the required information. (also see [chapter 3.7 Adding Users](#))

Attention: The license is probably assigned to the contract manager.

This needs to be unassigned, so the seat will be available for a different user. You can do this by clicking **“assign”** and uncheck the checkbox.



- If the User is already added click on **“Edit Access”**.
- Next click on **“Products & Services”**. (Figure 22)
- Next click on the respective product. The number of **“Seats available”** shows how many licenses you can still assign to users.
- Next click on **“Assign”** on the right and if you are done click **“Save”** to grant the user permission to use this license.

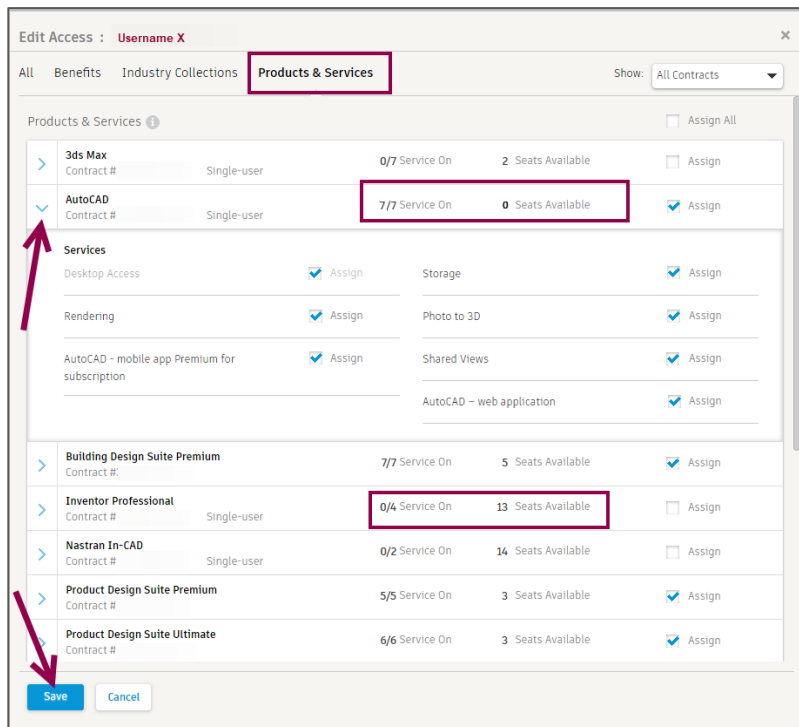


Figure 22: Edit Access screen

- The user can now access this license through his/her Autodesk Account. And can now activate/use the software.

Attention: The User in question, has to have his own Autodesk Account and it needs to be activated.

6 Support

If after following this manual you still have questions we advise to contact Cadac through the below website.

<https://www.cadac.com/support-contact/>

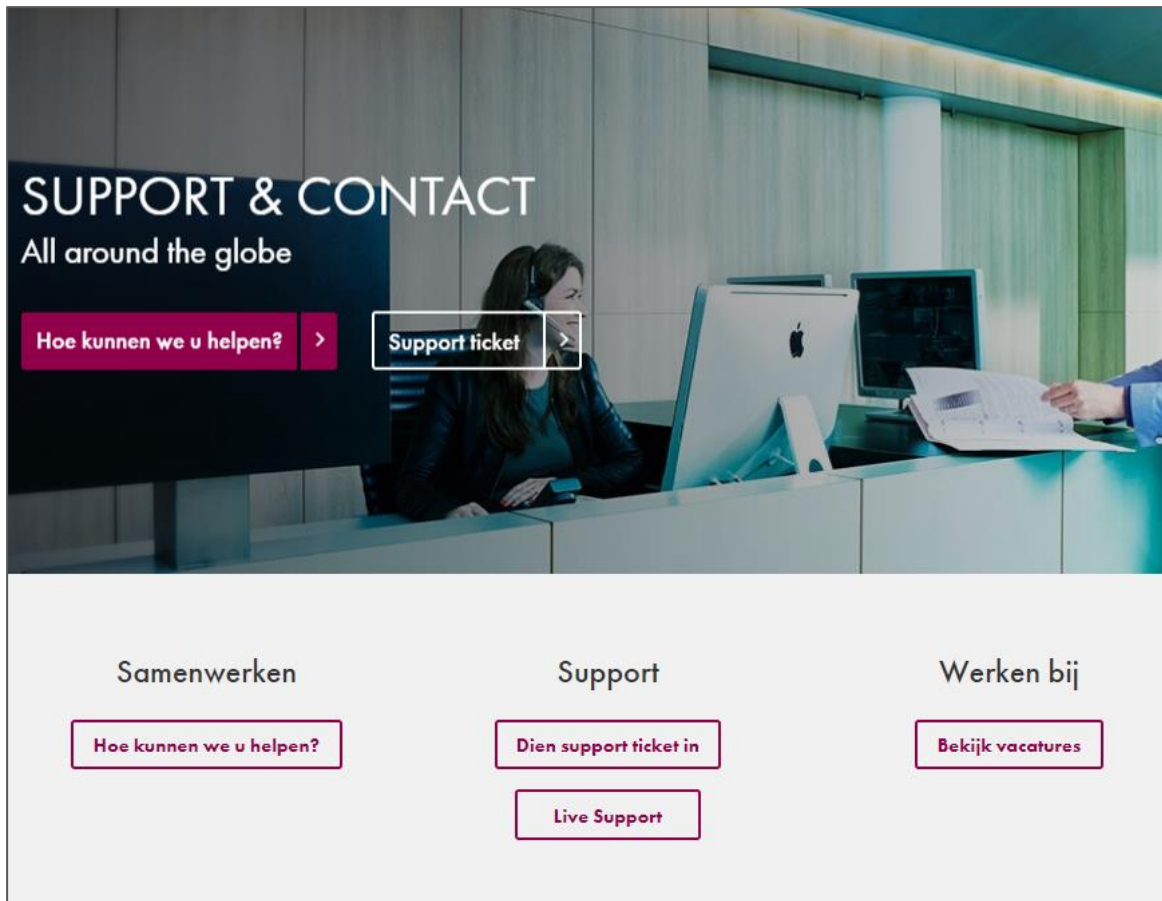


Figure 23: Support & contact page

We wish to thank you for your purchase and hope you will enjoy your subscription!

Cadac Group