

# Administration of Licenses

## Company Administered Accounts

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### Basic process

The InStep Studio 3D Desktop Application utilizes a web-based account system. Beyond the individual licenses (where a user administers their own license), a Company Admin – Dependent system can be used so that a central account can allocate multiple user accounts. This is intended for cases where a reseller or company IT department is the central agency, not the individual user. This document explains the step-by-step process to set up and administer these accounts.

### End User Process

For the actual user of the application, the following steps apply:

#### Create an account

The first step is to create an account at <https://www.solveering.com/instep/access/signup.aspx>

The screenshot shows a web browser window with the URL <https://www.solveering.com/instep/access/signup.aspx>. The page has a header with the InStep Studio 3D logo and navigation links: 'Solveering Home', 'InStep Home', and 'Help Home'. The main content area is titled 'Sign Up for an InStep Account' and includes a welcome message: 'Welcome, to get started with InStep, please create an account (or [Sign In](#)) :'. Below this, there is a 'Required: \*' section with the following fields and labels:

- User Name:  Desired UserName \* [← Available?](#)
- Captcha Code:  **yo6K2M** (click to refresh)  letter-code \*
- First Name:  First Name
- Last Name:  Last Name
- E-mail:  Email \*
- E-mail:  Email \*
- Confirm mail:  Password \*
- Password:  Password \*
- Confirm Password:  Password \*

At the bottom of the form is a 'Create' button.

Figure 1: User Signup Page.

Once the account process has been completed (an email will be sent with a confirmation link to the email provided). The user can log in at <https://www.solveering.com/instep/access/login.aspx>

### Set the License to Company-Supplied

Once logged in, select **License** and then **View License** from the left-hand options:

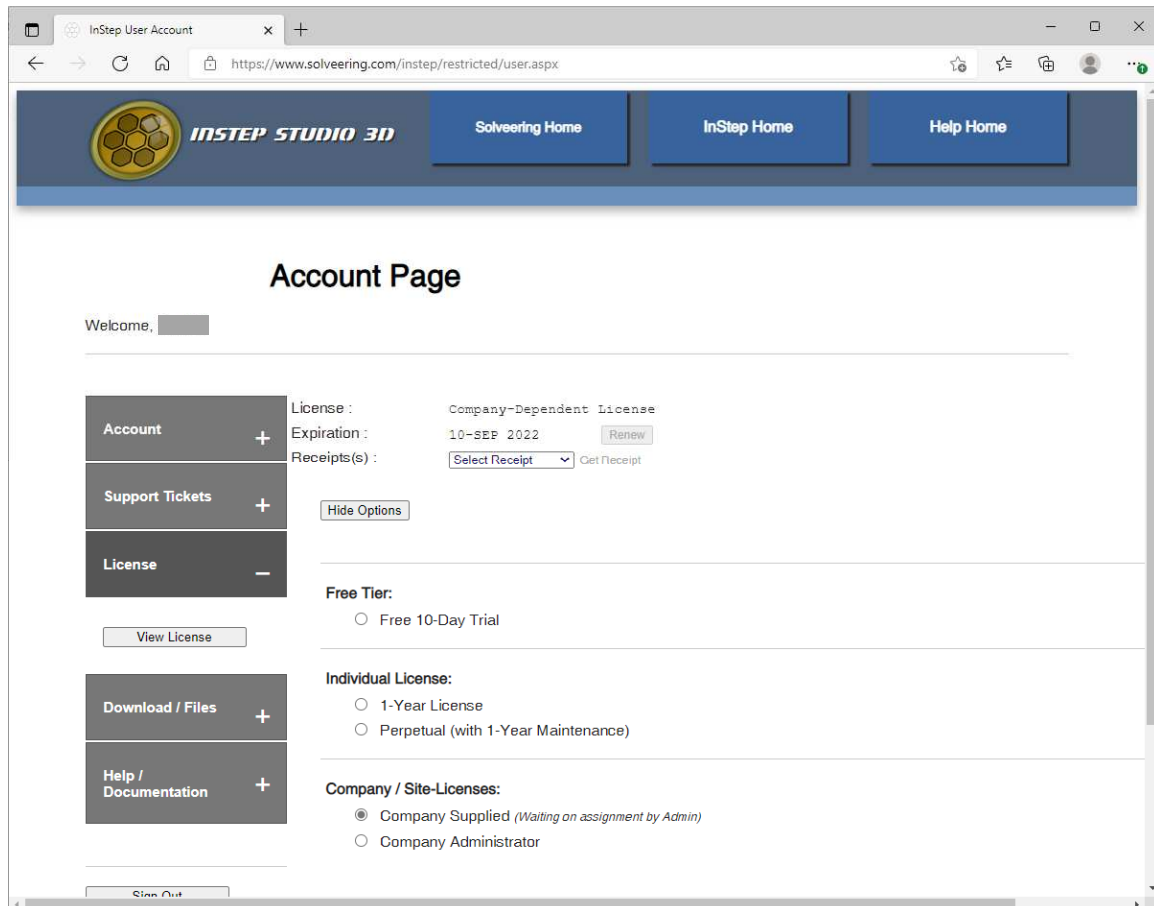


Figure 2: License Settings Page in the User Account

Depending on the current settings, this page may look slightly differently but there should be an option to “Show Options”. Clicking this will display the available license options shown in Figure 1.

Select the “Company Supplied” option. This places the account into a receiving mode, allowing administrators to assign a license to this account. This step is important as only users that are in a receiving status can be added.

### Download the application

If not done yet, this would be a good time to download the application from the Download/Files option on the left. Once downloaded, the application may be installed.

### Request Admin to allocate a license

It is up to the individual to contact the administrator of the license the user wishes to use. All interaction for allocating and de-allocating is handled by the administrator. Once the license has been allocated, the

user should see the message label next to the license provide the contact information of the administrator. As long as the message reads “Waiting on assignment by Admin”, the license has not been allocated to the user.

## Administrator process

The administrator account setup is exactly the same as that for the end user. Step 1, signing up for an account is the same.

Once logged in, the Admin account is to be used to purchase the necessary licenses by using the Company / Site License option:

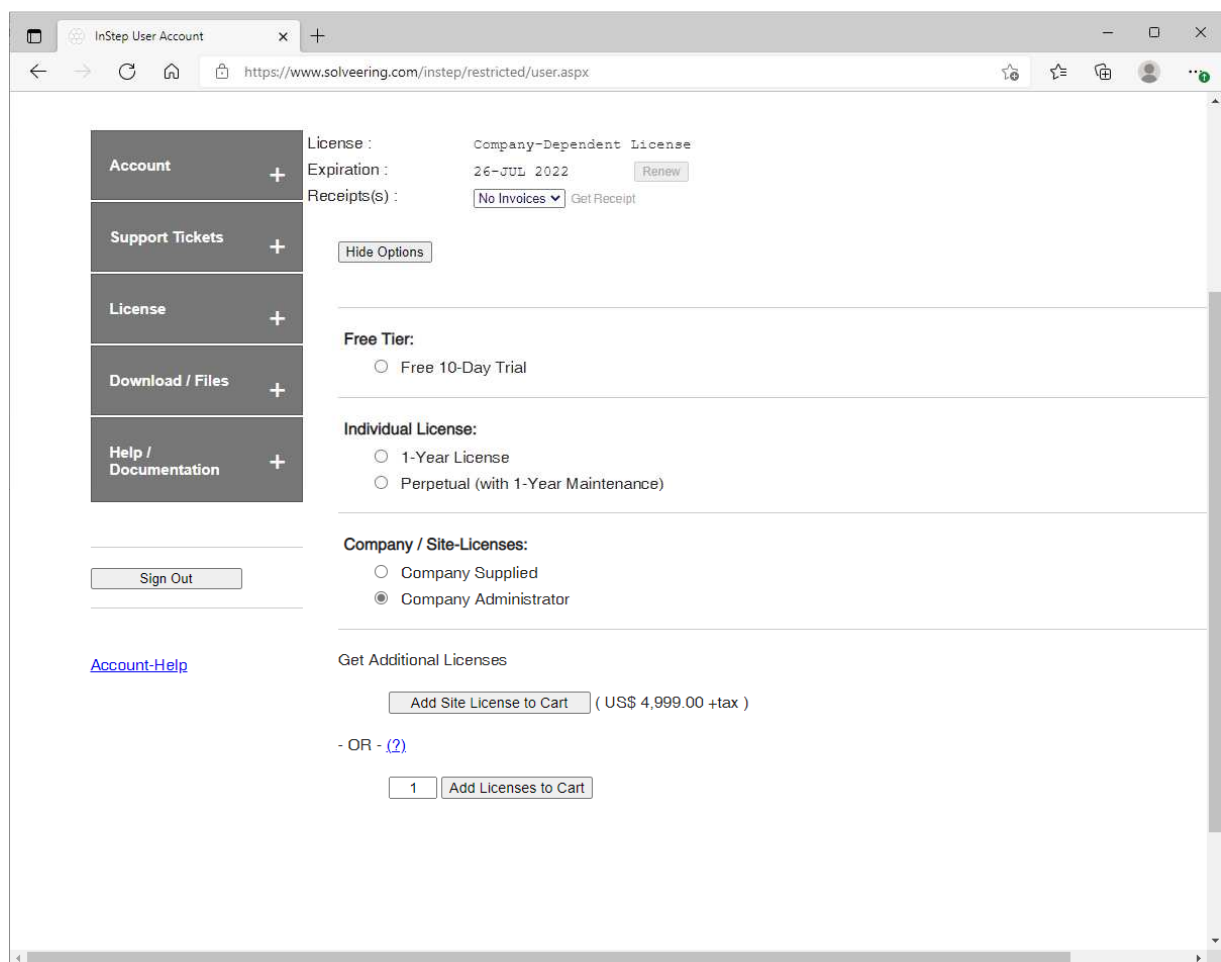


Figure 3: Company Admin account.

Two options are available: Site License or Individual / Bulk licenses.

The Site License is a highly discounted license that allows an administrator to allocate licenses within the same domain (same email domain such as \*@example.com). This only applicable to corporations or educational institutions.

The Individual licenses are bulk licenses with discounts applied based on the number of licenses purchased at a time. Additional or alternative discounts may be applied if a coupon code has been provided.

Once the desired selection has been made, the purchase of the licenses is completed by clicking on the checkout button:



It should be noted that clicking on the button above starts the process through the PayPal API, any delays depend on additional loads that the server may be encountering or other running tasks and is beyond our control.

During this step, the discounts are calculated and applied and the browser redirected to the PayPal site where the option exists to purchase either with a PayPal account or by using a Debit/Credit card:

A screenshot of the "Pay with PayPal" form. At the top is the PayPal logo. Below it is the heading "Pay with PayPal" and the instruction "Enter your email or mobile number to get started." There is a text input field labeled "Email or mobile number". Below the field is a link "Forgot email?". There are two main buttons: a blue "Next" button and a white "Pay with Debit or Credit Card" button, separated by the word "or". An orange arrow points to the "Next" button and a green arrow points to the "Pay with Debit or Credit Card" button. At the bottom, there is a link "Cancel and return to InStep Studio (by Solveering LLC)" and a row of language links: "English | Français | Español | 中文".

Upon completing the process (which is handled entirely by PayPal – we do not access or get information about your financial accounts), the completion page will be displayed.

At this time, on the main account page, the available licenses are displayed:

The screenshot shows a web browser window with the URL <https://www.solveering.com/instep/restricted/user.aspx>. The page is titled "InStep User Account". On the left, there is a sidebar with links: "License", "Download / Files", "Help / Documentation", and a "Sign Out" button. Below the sidebar is a link to "Account-Help".

The main content area has a "Hide Options" button at the top. Below it, there are three sections for license selection:

- Free Tier:**
  - ☐ Free 10-Day Trial
- Individual License:**
  - ☐ 1-Year License
  - ☐ Perpetual (with 1-Year Maintenance)
- Company / Site-Licenses:**
  - ☐ Company Supplied
  - ☒ Company Administrator

Below these sections is a "Get Additional Licenses" section with a dropdown menu showing "1" and an "Add Licenses to Cart" button.

The "Modify License Pool (5 of 5 available) :" section contains two input fields and two buttons:

- Input field: "Enter User Email(s)"
- Button: "Add User(s)" (separate with comma or semicolon)
- Input field: "Enter UserName(s)"
- Button: "Add UserName(s)" (choose either email or username, separate with comma/semicolon)

An orange arrow points to the "Add User(s)" button.

The footer contains the following text: "© 2022 Solveering LLC", "Home", "Contact", "Sitemap", "Privacy Policy", and "Webmaster".

Figure 4: Allocating users.

If the UserName for the end user is known, they can be added and then the license allocated to that user. Allocated users will appear in the list below. If the user name cannot be allocated, it likely means that the user did not place their account in a receiving mode.

If any issues are encountered in this process, please contact us via [support@solveering.com](mailto:support@solveering.com) and provide information about any issues you encounter. We will respond as soon as possible to any comments or questions.