

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 dark blue header with the InStep Studio 3D logo on the left and three navigation buttons: 'Solveering Home', 'InStep Home', and 'Help Home'. Below the header, the main content area is white and contains the heading 'Sign Up for an InStep Account'. A welcome message reads: 'Welcome, to get started with InStep, please create an account (or [Sign In](#)) :'. The form consists of several fields: 'User Name' with a dropdown menu showing 'Desired UserName' and an 'Available?' button; 'Captcha Code' with a blue image containing 'yobK2M' and a 'letter-code' input field; 'First Name' and 'Last Name' as separate text input fields; 'E-mail' as two text input fields; and 'Password' and 'Confirm Password' as two text input fields. A 'Create' button is located at the bottom of the form.

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:

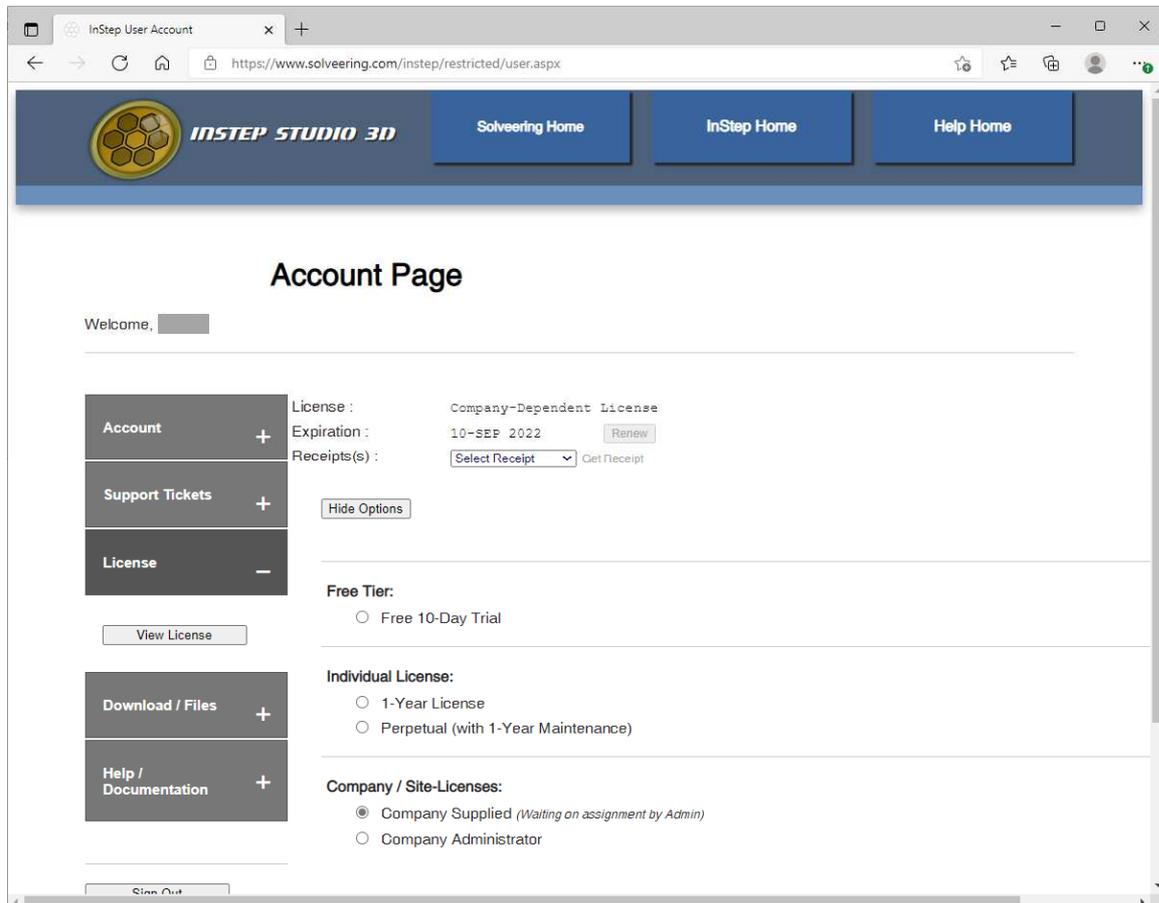


Figure 2: License Settings Page in the User Account

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:

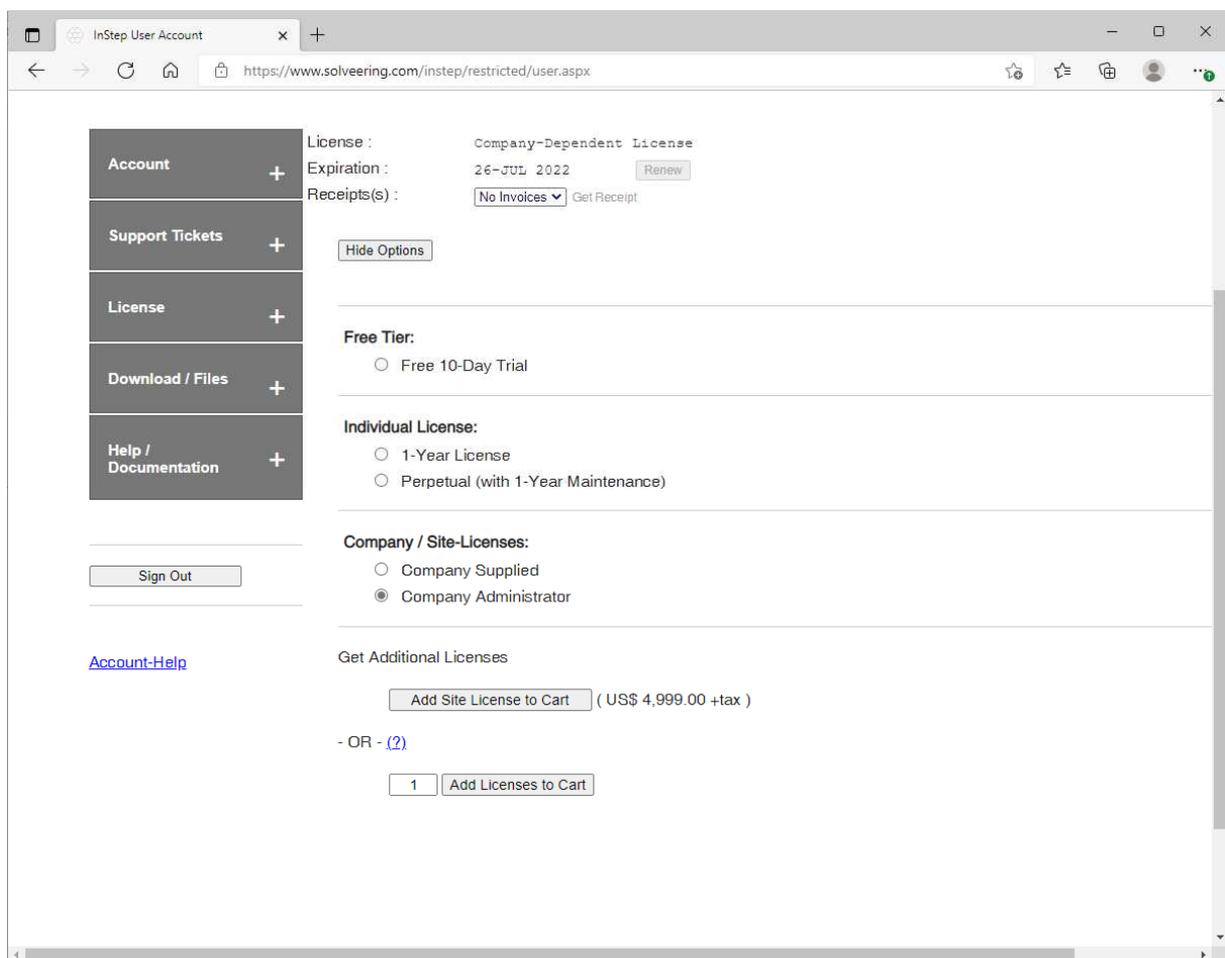


Figure 3: Company Admin account.

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.

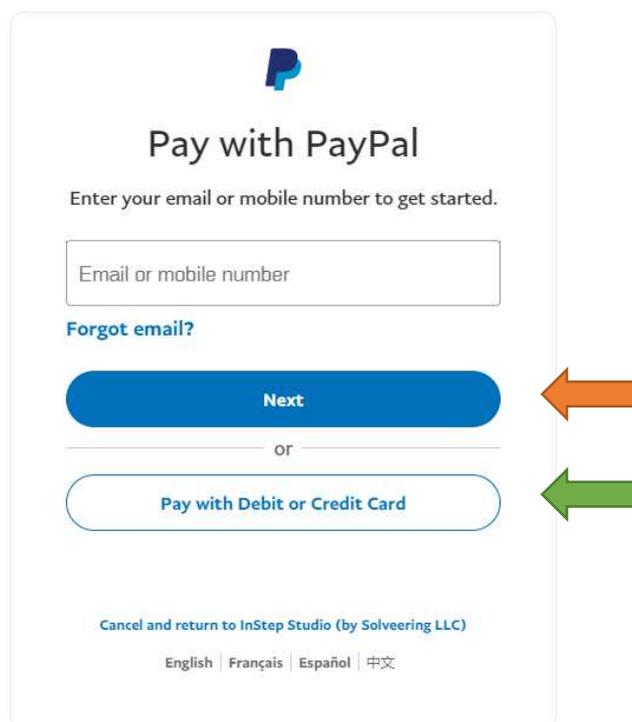
The Individual licenses are bulk licenses with discounts applied based on the number of licenses purchased at a time. Additional or alternative discounts may be applied if a coupon code has been provided.

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:



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:

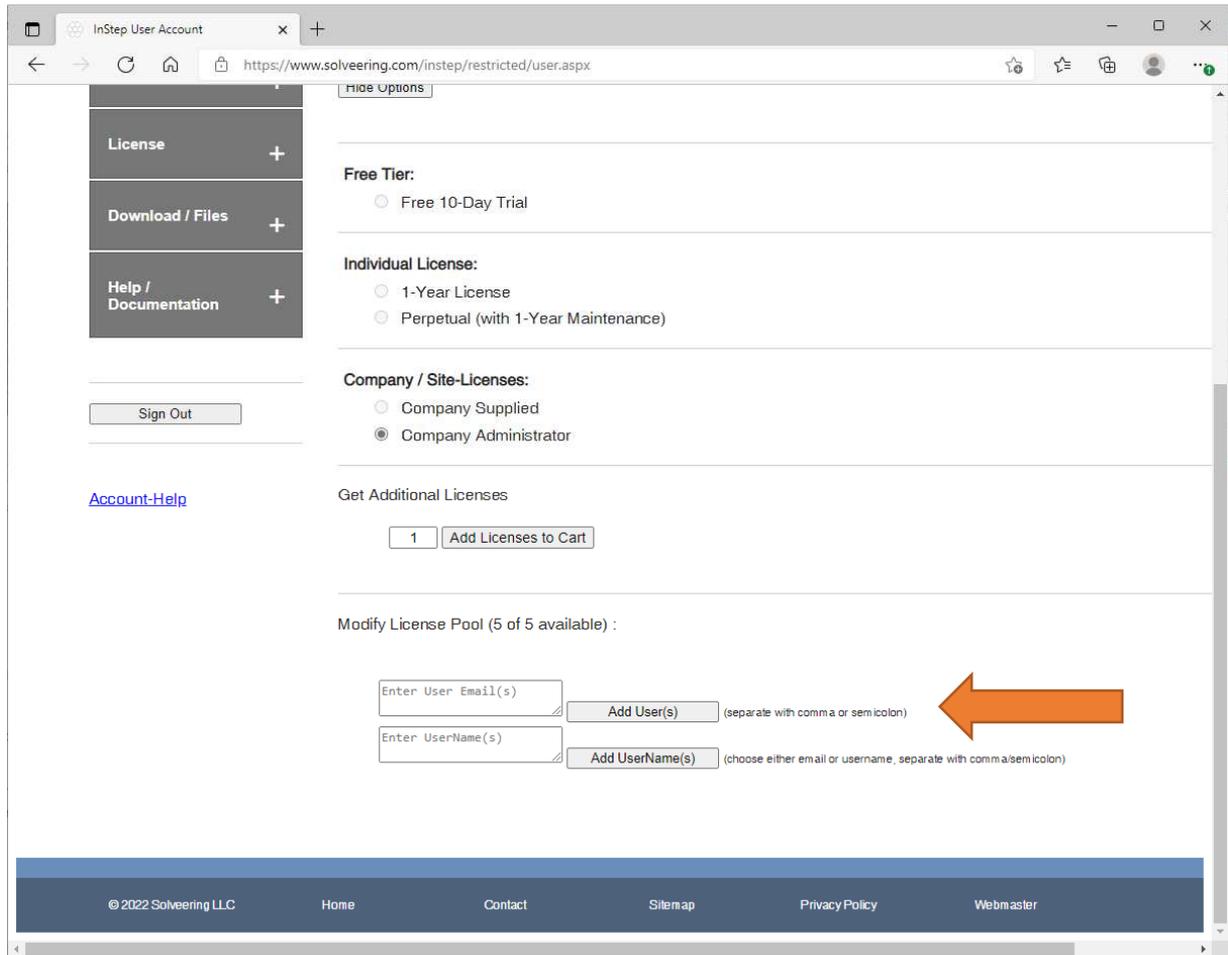


Figure 4: Allocating users.

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 and provide information about any issues you encounter. We will respond as soon as possible to any comments or questions.