ENFOCUS

Affordable, flexible automation

Phoenix Cloud Licensing

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1. About Phoenix Cloud Licensing

The Cloud licensing option allows you to **manage, distribute**, and **set up licenses online**. You can create an unlimited number of users for your organization and define exactly who can and can't have access to your licenses.

Note: When licenses of Phoenix are used with tilia Cloud, an active MSA is required at all times. Additionally an active tilia Cloud account is required.

Cloud licenses are managed at ***cloud.tilialabs.com*** (Phoenix was developed by Tilia Labs, now part of Esko). You can sign in using the credentials you received when purchasing Phoenix.

There are two types of licenses: Named user licenses and floating licenses.

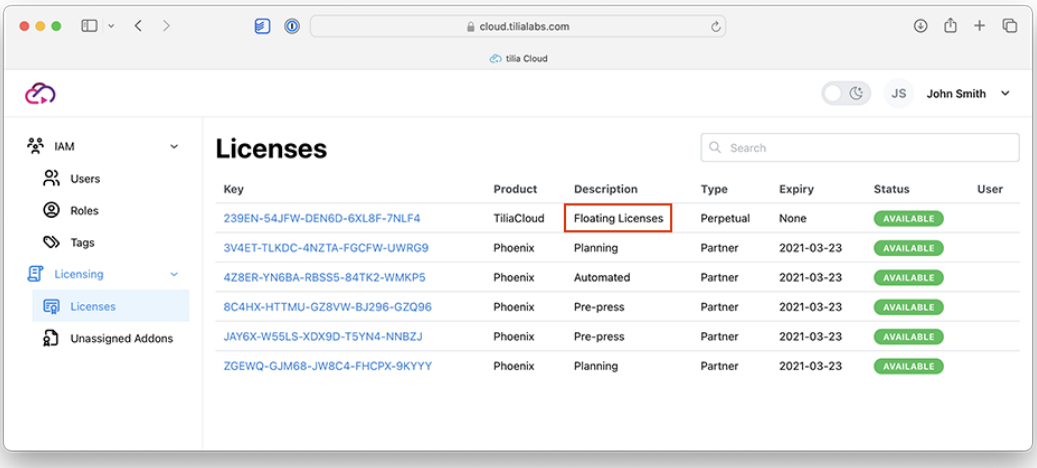
Named user licenses

By default, licenses are assigned to a specific user, referred to as *named user licenses*. In this way, users can only use the license that is assigned to them, and other users cannot use this license.

Floating licenses

Optionally you can float licenses across multiple users, meaning that different users can use the same license alternately. This licensing method is reserved for organizations who have a license for Tilia Cloud. You can find this information in the Licenses overview (see screenshot).

Both licensing methods use the same licensing engine and setup described further.

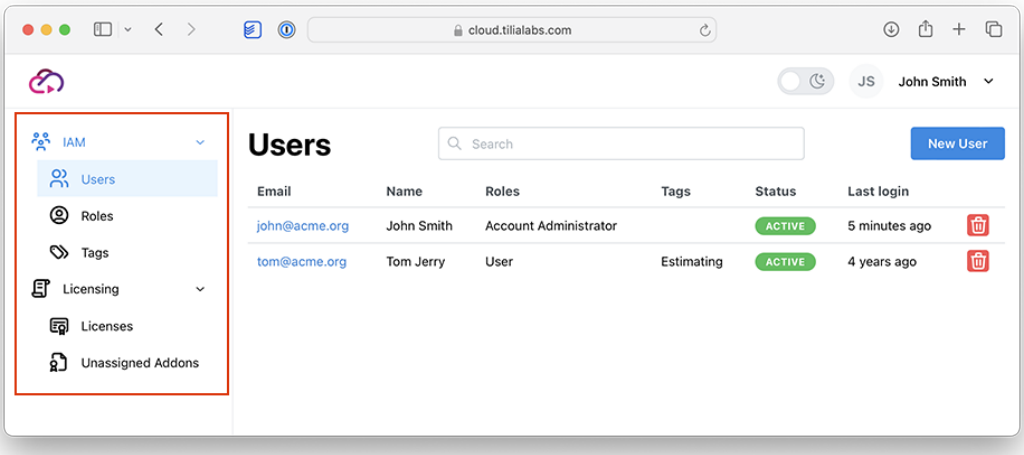


2. The Cloud environment

When signing in to cloud.tilialabs.com, you can use the navigation pane on the left to switch between the different pages.

The cloud environment consists of two sections:

- **IAM**: IAM stands for *Identity & Access Management*; in this section with 3 pages, you can add users, define roles and create tags (in case of floating licenses).
- **Licensing**: In this section, you can manage your organization's licenses and find unassigned addons if any.



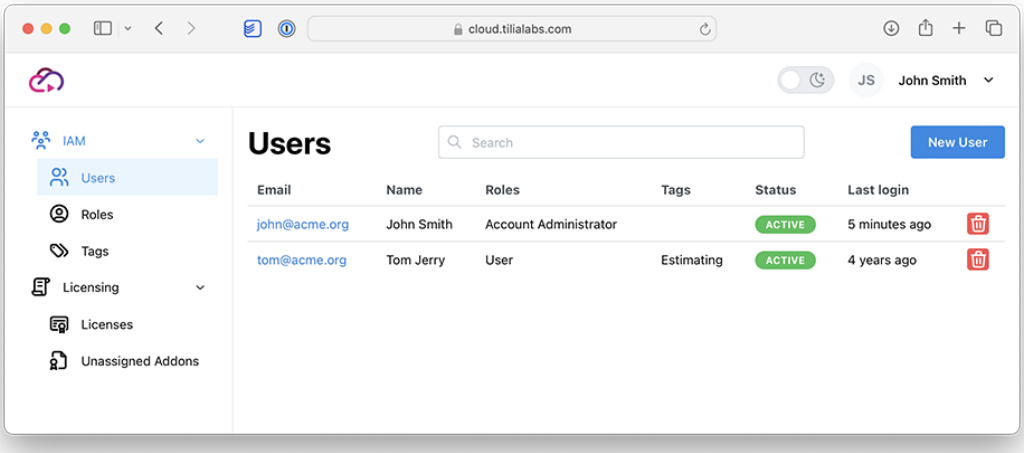
2.1. Users

What are users in tilia Cloud?

Users are unique logins for each person. A user consists of an email, name, role, and can be assigned tags. The account administrator will create separate users for each person that will use the licenses, which they will use to sign into the application to authenticate and consume a license.

The Users page

The Users page displays the users that are registered in the tilia cloud. You can access detailed user information by clicking the user's email address.



2.2. Roles

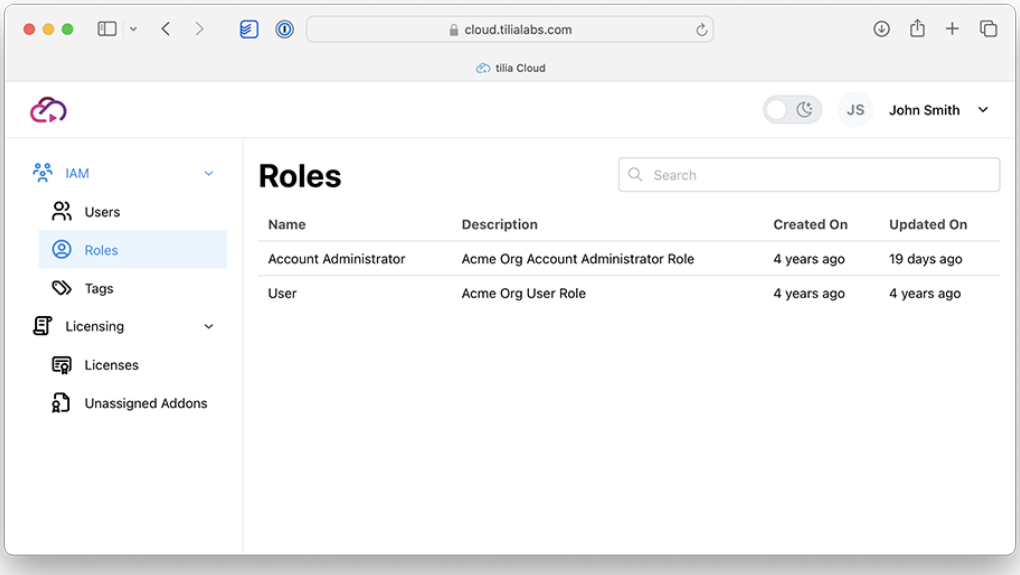
What are roles in tilia Cloud?

Each user will have one of two roles - either they are an account administrator or a user:

- **Account Administrator**: Users assigned this role have the ability to create new users, edit users (including assigning *tags*), and delete users.
- **User**: Users assigned this role are regular users that can consume licenses. They can change their password, but they cannot administer anything on tilia Cloud, assign or modify other users.

The Roles page

This page displays the available roles. It's not possible to create or edit roles.



2.3. Tags

What are tags in tilia Cloud?

Note: Tags are only applicable if you have Tilia Cloud as a product in your Licenses overview.

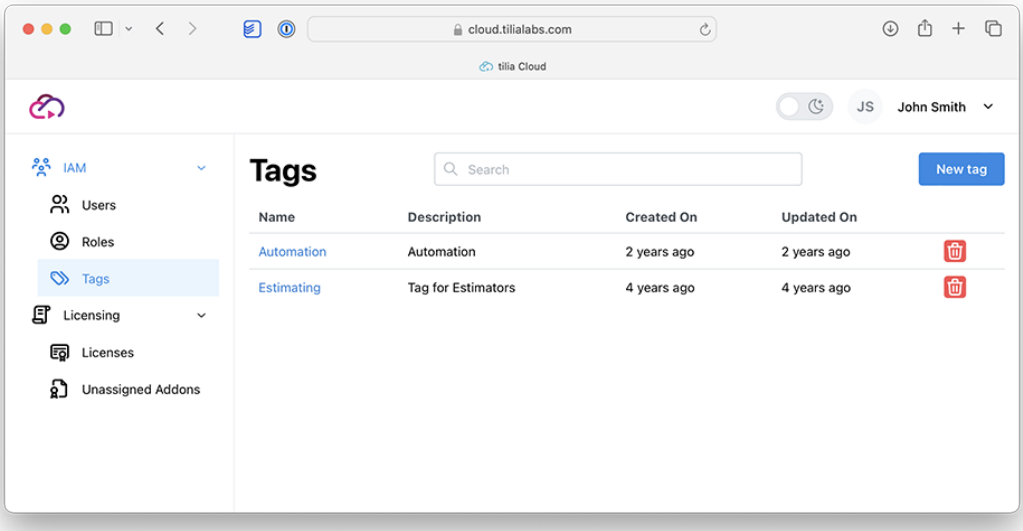
Tags are how licenses are tagged, or assigned, to users.

Tags are created in the Tags page of IAM (Identity & Access Management) on tilia Cloud, and then they can be assigned to licenses and to users. For example, you can create a tag called "Estimating" that is assigned to each of your users that are estimators, and then specify the "Estimating" tag for one of your licenses. Now, each of the users assigned that tag can consume that license, as long as it's not already being consumed.

About the Tags page

The Tags page gives an overview of the available tags. Account administrators can create new tags and edit existing tags.

Note: This page is only available if you have Tilia Cloud as a product in your Licenses overview.



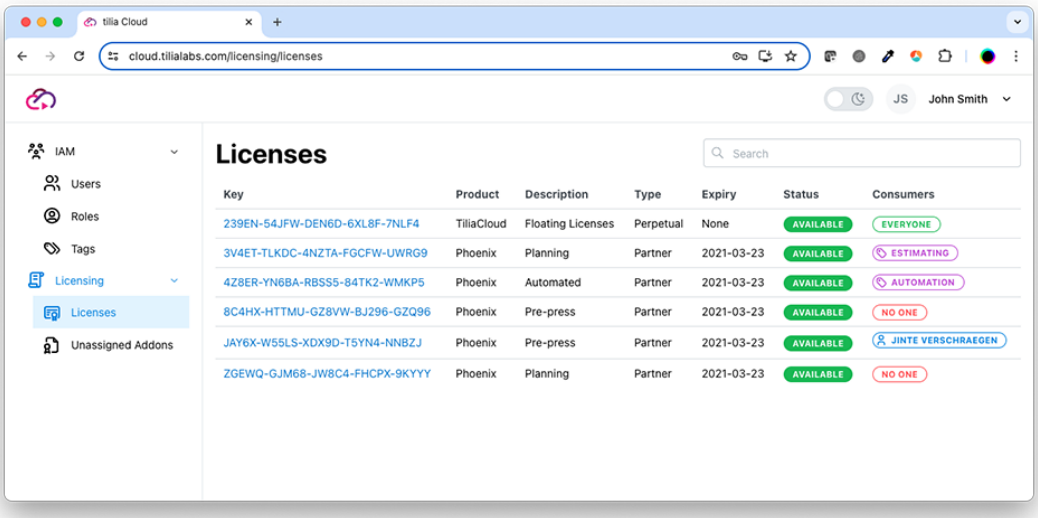
2.4. Licenses

What are licenses in tilia Cloud?

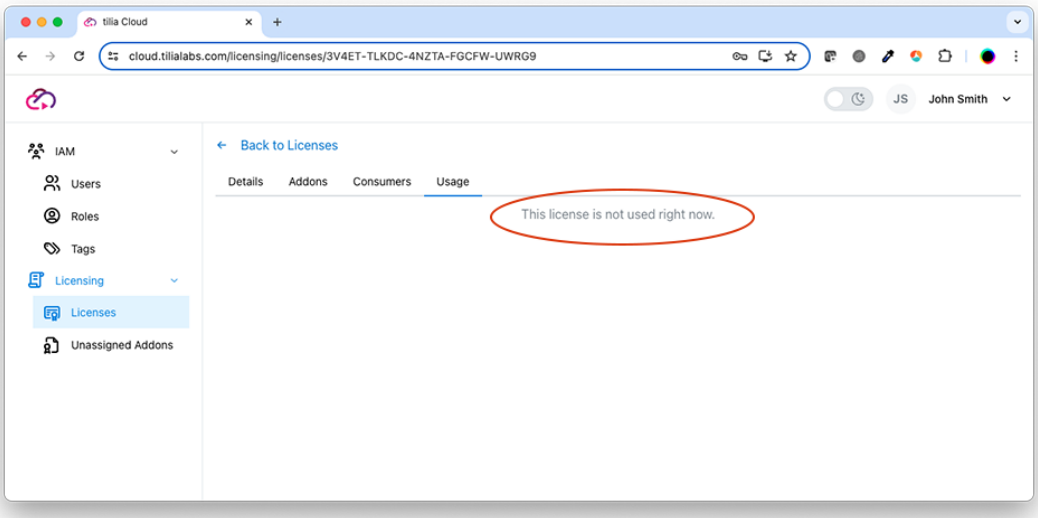
Licenses can be assigned to users or to groups of users (tag based).

About the Licenses page

The Licenses page lists the product keys purchased by your organization. For more info about a key (e.g. the product and the version it gives access to), you should click the key value (blue link) in the first column of the overview.



Note: The last column of this overview shows the **consumers**: the people that are entitled to use the key concerned, for example: everyone, no one, users with a certain tag (such as estimating or automation), or a named user. The current usage of the license (that is, who is currently signed in the software using the key) can be seen through the details of the product key, on the **Usage** tab. Note that there's also an Addons tab, listing the addons of the license. For more information, refer to *Unassigned addons* on page 8.



License types

For each key, you can find the type of the license in the 4th column of the Licenses overview:

- **Trial license**: Only valid either until a fixed expiry date, or for a specific trial period (which starts once the license has been activated). For all trial licenses, an internet connection is required during start-up to verify its authenticity.

- **Partner license (NFR)**: Partner licenses are essentially the same as trial licenses, with the exception that they do not require an internet connection at start-up to verify authenticity. This is particularly useful for resellers who perform on-site demos with a laptop and tradeshows.

- **Subscription license**: Subscription licenses are licenses generated for purchased copies of the software. They can be used during the time of the subscription period, typically one year. Timely renewal of the subscription will guarantee a smooth continuation of the use of the product under the same software key.

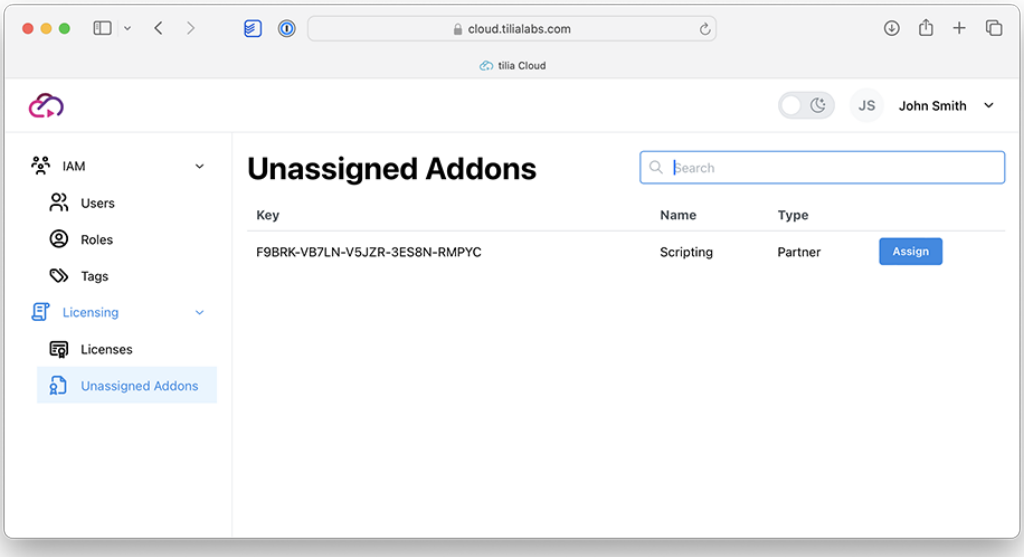
2.5. Unassigned addons

What are addons in tilia Cloud?

Addons are special licenses that give access to extra functionality, for example scripting or barcodes in Phoenix. Addons have to be assigned to licenses. If they are not assigned, they cannot be used.

About the Unassigned Addons page

This page lists addons that have been purchased by your organization but that have not yet been assigned to a license. To do so, refer to *Assigning an unassigned addon to a key* on page 13.



3. Setup

3.1. Best Practices

As an account administrator, you are responsible for setting up the users, roles and tags and distributing the licenses.

In order to get this done properly, we recommend proceeding as follows:

If you're going to use floating licenses and tags (Tilia Cloud is one of the products in the Licenses overview):

1. Define which tags you need and create them. See *Creating a tag* on page 12.
2. In the list of licenses, define which product keys need to be linked to which tags. See *Assigning a license to a user or a group of users* on page 12.
3. Now create users and assign each of them the appropriate tag. See *Creating a user* on page 10.

If you're not going to use floating licenses and tags, but only named user licenses:

1. Create the users you want to assign a license. See *Creating a user* on page 10.
2. Go to the Licenses overview and assign each user the appropriate key. See *Assigning a license to a user or a group of users* on page 12.

3.2. Creating a user

If you want to give someone access to Phoenix through a cloud license, you need to create a user account for this person.

Note: Only an account administrator can create users.

Proceed as follows:

1. Sign into *cloud.tilialabs.com*.
2. Switch to the *Users page*.
3. In the top right corner of this view, click the blue **New User** button.
4. Enter the requested info:
   - Email address
   - First name
   - Last name
   - Description (optional)
   - Role (optional) - see *Roles*.
5. Click **Create**.

An email is automatically sent to the user to activate the account and to set a password. Until that time, the status in the list of users will indicate that the user is *Pending*.

Note: This email should come from info@tilialabs.com. Please be sure to check any spam or junk folders for this invitation, and note that the activation link in the email expires after three days. You can resend the activation link if needed. See *Resending the activation link* on page 11.

You're back in the Users view displaying the list of all registered users.

6. Optionally, specify the **role** of the new user (if not done yet) or assign the user one or more **tags** (if you're using floating licenses).

   See *Updating a user* on page 11.

7. Assign the user the appropriate license(s).

   See *Assigning a license to a user or a group of users* on page 12.

Once the user has clicked the link and chosen a password, the user can use the assigned license.

3.3. Resending the activation link

After the account administrator has created a user in the tilia Cloud (cloud.tilialabs.com), the user concerned receives an email with an activation link. However, the activation link in this mail expires after three days.

To resend the mail with the activation link, proceed as follows:

1. Sign into *cloud.tilialabs.com*.
2. Switch to the *Users page*.
3. Click the email address of the user to whom you want to resend the activation email.
4. Click the **Resend Activation Link** tab.
5. Click **Resend**.

A mail with a new activation link is sent to the user. This link remains again valid for three days.

3.4. Updating a user

Account administrators can update info about an existing user, for example change the details (such as the email address) or the role and add or remove tags.

Note:

- Only account administrators can create and manage users. Other users can only change their password through the tilia Cloud. See *Roles* on page 5.
- Tags are only applicable in case of floating licenses.

Proceed as follows:

1. Sign into *cloud.tilialabs.com*.
2. Switch to the *Users page*.
3. Click the email address (= username) of the user you want to update.
4. Switch to the relevant tab (Details, Role, Tags).
5. Make the changes as required.
6. Click **Update**.
7. To return to the Users overview, click the blue **Back to Users** link, just above the tabs.

The changes are applied immediately.

3.5. Creating a tag

Tags are used to assign a license to a group of people, typically with the same type of function, e.g. automation, planning etc. All users having the same tag can use the license(s) tagged with that particular tag.

Proceed as follows:

1. Sign into *cloud.tilialabs.com*.
2. Switch to the *Tags page*.
3. In the top right corner of the page, click the **New tag** button.
4. Enter a name and optionally also a description.
5. Click **Create**.

The tag is added to the list of tags. Make sure to assign the tag to all users that need the same type of license (see *Updating a user* on page 11) and to link it to one or more particular licenses (see *Assigning a license to a user or a group of users* on page 12). Note that tags that are not used can easily be deleted from the overview by clicking the recycle bin icon to the right.

3.6. Assigning a license to a user or a group of users

The licenses purchased by your organization can be found in the *Licenses overview*. The value in the Consumers row (the last row) shows to whom the license is currently assigned. In case of a tag (see *Tags* on page 6), all users having that tag have the right to use the license, as long as it is not being used yet by another user.

This topic explains how you can assign a license to a particular user (username based) or to a group of users (tag based).

Proceed as follows:

1. Sign into *cloud.tilialabs.com*.
2. Switch to the *Licenses overview*.

3. Click the key of the license you want to assign to a particular user or to a group of users.

   On the Details tab, you can see al info concerning the product, the version, the type, the expiry, etc.

4. Click the Consumers tab.
   The currently selected consumer or group of consumers is highlighted in blue. In case of tags, the tags refer to the users having this tag in their profile.

5. Click the option of your choice:

   - **No one**: If selected, the license cannot be used by any of the registered users.
   - **User**: Select the user from the list of registered users. Only one user can be selected.
   - **Tags**: Select one or more tags from the list of available tags. Users having at least one of the selected tags will be able to use the license.
   - **Everyone**: If selected, the license can be used by all registered users.

6. Click **Update consumers**.
   A warning appears, reminding you that the license will be released automatically and that the change will take effect immediately. Note that you can see on the Usage tab whether or not the license is currently in use.

7. To confirm, click **Yes, update it**.

8. To return to the *Licenses overview*, click the Back to Licenses link.

The license is attributed to the selected consumer(s).

3.7. Assigning an unassigned addon to a key

An addon that has not been assigned to a license cannot be used.

To assign an addon, proceed as follows:

1. Sign into *cloud.tilialabs.com*.

2. Switch to the *Unassigned addons page*.

3. Click the **Assign** button to the right of the addon you want to assign.

4. From the list of available licenses, select the license to which you want to assign the addon.

   The dialog lists all licenses and their addons. Note that you cannot assign the same addon twice to a license.

The addon is no longer visible in the Unassigned addons overview.

Note: If for any reason you would like to unassign and addon, go to the Licenses overview and select the license concerned. On the Addons tab, you'll find an overview of all addons linked to the license, and a red **Unassign** button.

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