Client Portal

User Guide

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Presentation Solutions

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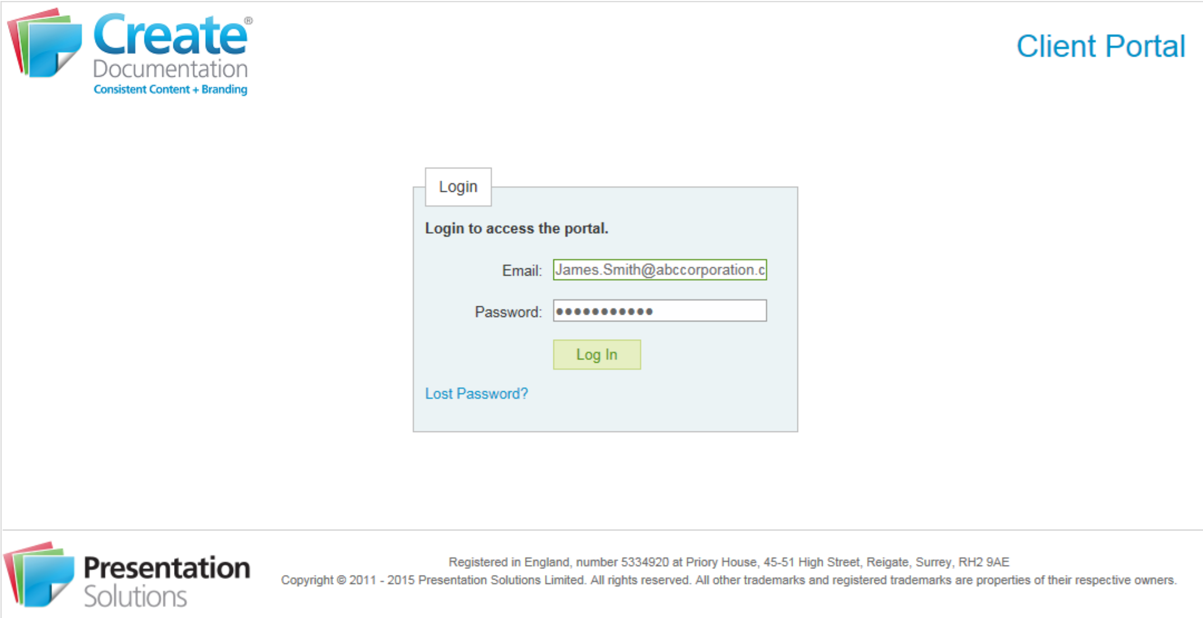
1. Introduction

The Client Portal allows nominated authorised staff (Administrators) to manage the allocation of licences to Users for their company or organisation.

In addition, it allows client access to a record of payments and provides a history of staff usage of the Create software product.



Presentation Solutions

2. Process

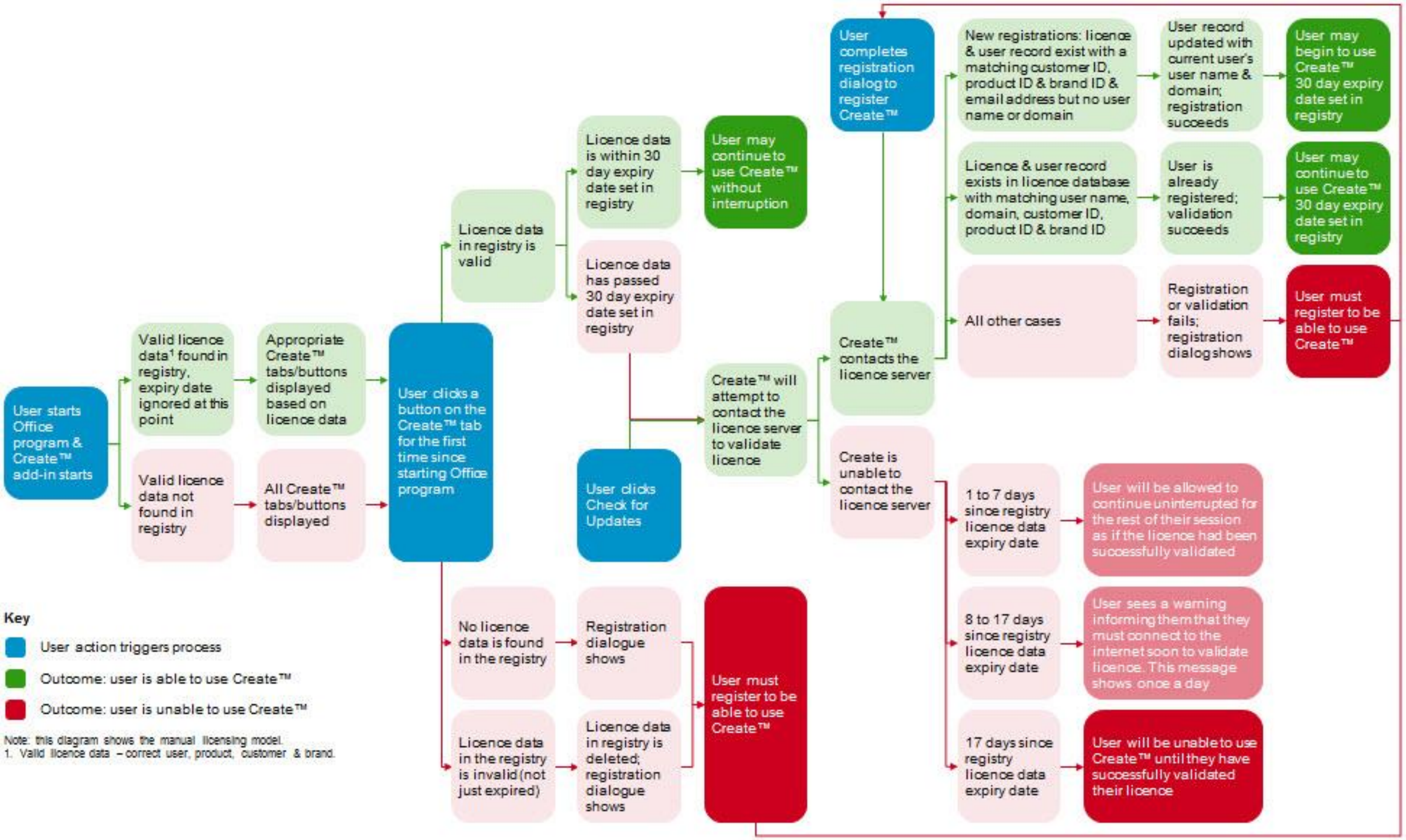
Set-up Procedure

Presentation Solutions Support set up a client company account in the Client Portal. In the first instance this will include setting-up the billing groups, invoice addresses and an administrator.

Presentation Solutions will liaise with you, our client company, to agree the nominated Administrator/s and once this account is set-up the Administrator may take over the management of the Client Portal. Administrators are the only ones authorised to control licence and brand allocation and therefore control client expenditure, on behalf of their organisation.

Presentation Solutions can in the first instance load the Client Portal with the details of each person who will have Create installed (Users). This task can also be performed by the Administrator and users can be inputted individually and for multiple users there is a Bulk Import function built into the Portal.

Licence and Registration Process Chart



Definitions and Process

Data Collected

The records that we keep are of enabled, active or deactivated users. At any time you can view a record of anyone who could use the Create software (enabled), who is using the Create software (active) or has stopped using Create (deactivated).

Create connects directly to a WCF (Windows Communication Foundation) web service to validate licences. It transmits the following data collected by Create, in XML form, for initial licence registration:

- Email address, first name, last name (entered by user)
- Domain name, user name, machine name, OS version, regional settings (provided by Windows)
- Create and Office version numbers
- Create product and customer codes (from Create's customisation files)

Then monthly for further licence validation and billing reports:

- Domain name, user name, machine name, OS version, regional settings
- Create and Office version numbers
- Create product and customer codes

Administrator

Portal administrators are assigned by each company as people who have the authority to:

- view, assign and edit user licences
- assign or revoke brand permissions
- generate user reports
- view and edit client and user billing information
- generate billing reports

Note: Billing is attached to the brand when a user registers. Where more than one brand is used, two licenses will be applied and therefore two monthly subscription charges.

Enabled

Gives users the right to use Create software. Enabled Users are not active until they register. You would change an active user status to enabled where you wish to temporarily suspend the use of Create, e.g. during maternity or parental leave, or a sabbatical.

Register

A dialog box will appear in PPT, Word or Excel when a user, who has Create installed, begins to use it. Users enter their name and email address, which must correspond with this data on the Portal. The registration checks and validates the license on first use and thereafter every 30 days.

Active	Users who have activated the software licence by using it and registering their details against a brand. Billing on the registered brand commences.
Licensed	Users with permission to use the selected brand. Billing on this brand starts at this point.
Unlicensed	Users without permission to use the selected brand. Billing on this brand stops at this point.
Deactivated	Users whose right to use Create software has been stopped. Administrators would only apply this status to a user if they do not want the user to use the software because they have: • changed roles and no longer require the use of Create • left the company If you deactivate a user this will automatically unlicense them for any brand/s for which they have been licensed. It is possible to make a deactivated user active again so use this function if you think that this person may want to use Create again in another role or if they return to this role e.g. maternity leave or a sabbatical.
Billing Period	Any licence activated or deactivated will be invoiced for a whole calendar month, at the point of registration; or unlicensed to the nearest month end. Deactivating a user also removes all brand permissions.
All Users	View that shows Enabled Users (anyone who could use the software), Active Users (anyone who is using the software), Deactivated Users (anyone who no longer has the right use the software) and Trial Users (users who have the software licence for trial purposes only).
User	An employee who is given permission to access and use Create software.
Brands	You may have more than one corporate or brand identity ("brand") set up in Create. This might be for different business units whose identity/look and feel is completely different, or when you are rebranding and want to transition from one brand identity to the other (e.g. Current brand, Old brand). A user must register for each brand.

An administrator can give users the right to access a brand/s, but they are not active until they register each brand.

Billing Group

Each brand is assigned to an invoice billing group. Where a client wishes to have invoices allocated to more than one contact/department/group within the company, this can be handled by setting up multiple billing groups.

Reports

Reports containing information about users, usage of the software and billing may be generated directly from the Client Portal. Reports can be downloaded as CSV or Excel files and saved.

Last Validated

Every 30 days Create software needs to check an active user's licence via the internet. Access to the internet is required, however the user does not need to do anything as Create will perform this task silently. If our web service cannot be reached, Create will continue to work for another 7 days.

If our web service still cannot be reached, Create will continue to work for another 17 days, however users will see a warning informing them that they must connect to the internet soon to validate their licence. This message will show once a day.

If after the 24 day grace period, the web service still cannot be reached, the user will be unable to use Create until they have successfully validated their licence. The Create tab is still shown but functions do not work.

Once internet access is re-instated Create will validate the registration for another 30 days.

Billing Period

1 calendar month. Regardless of whether a user registers on the first or the last day of the month, the minimum billing period for that user will be one month.

Brand Permissions

In the User Account details form for each user, you can give permission to allow users to access a brand. There are only two options – Licensed or Unlicensed.

Licence Type

There is only one kind of Licence Type available for clients – this is "Manual".

Manual

Manual licensing requires a personalised licence record to be set up on the licensing database in advance of each user registering Create. The purpose of manual licensing is to stop unauthorised users being able to register Create.

3. Licensing Methodology

Manual Licensing

Manual Licensing allows clients to control the allocation of licences to staff (users) within their company.

Names of users may be input into the Client Portal once entered this will prompt an activation procedure to allow that person to load the software and commence usage.

This manual licensing method also means that the company or nominated Administrator can also deactivate a user within the Client Portal and so commence a procedure to stop a user having access to the software and more importantly stop the billing associated with this licence.

Licence Records

Records are kept of all client activity to verify actions to start and stop licences and thus to verify invoicing.

In addition, should a client instruct a member of staff in Presentation Solutions to undertake an action on their behalf, an automatic record will be generated which records this.

Any actions in the Portal undertaken by an Administrator within a client company or Presentation Solutions on the client's behalf, will be recorded.

Registration

Create registration and subscription requires internet access at initial registration and then every 30 days to verify the user is still using the licence. If our website cannot be reached within the 30 day period, Create will continue to work for another 7 days after which the user will be shown a warning, informing them that they must connect to the internet soon to validate their licence. For 17 days, if the user does not connect to the internet, they will be shown a daily warning.

At the end of this 24 day grace period, they will be unable to use Create until they have successfully validated their licence. The Create tab is still shown but functions do not work.

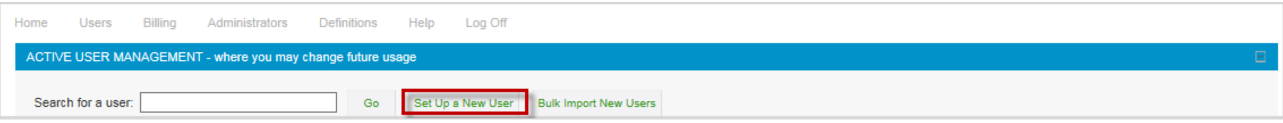
Once internet access is re-instated Create will validate the registration for another 30 days.

4. Managing Users

The Client Portal allows the Administrator to set up single or multiple users and edit user settings.

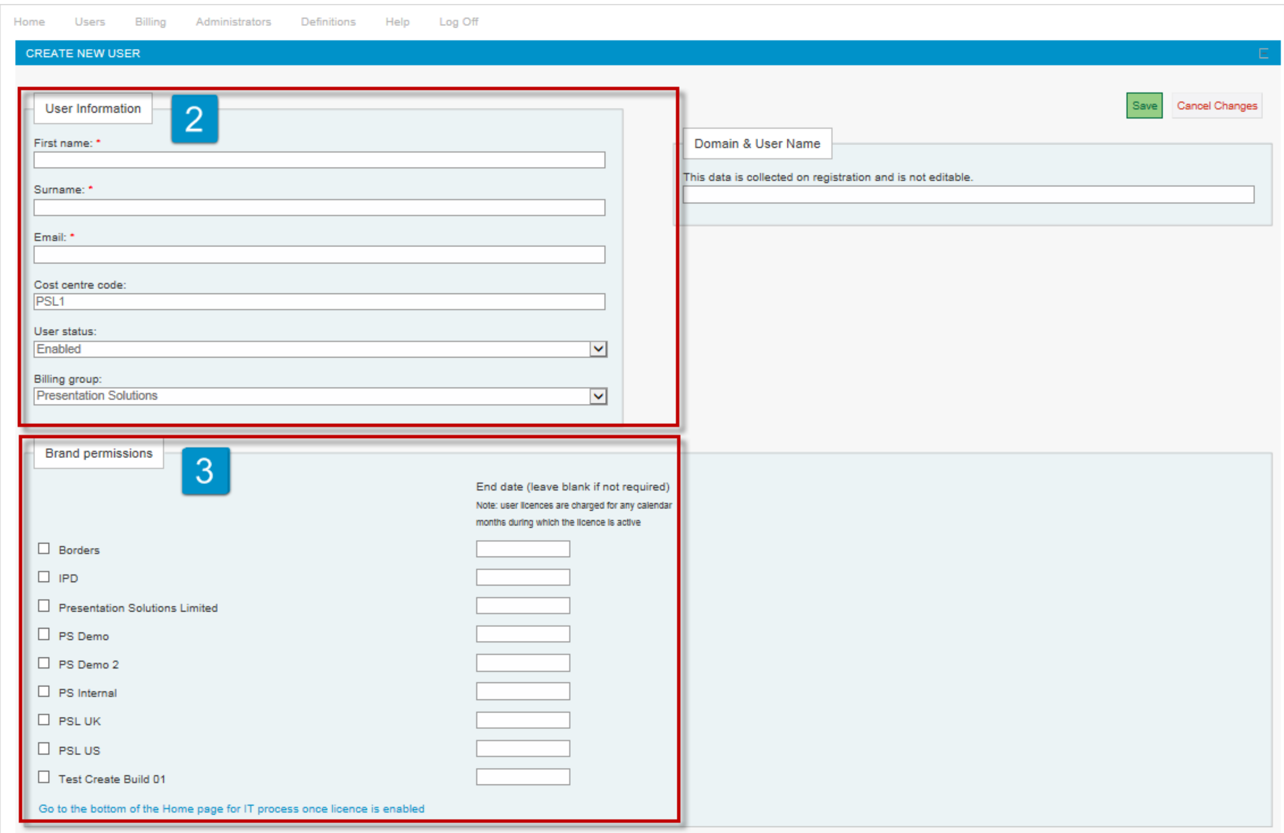
Setting up a Single User

1. On the **Home** page, in the **Active User Management** section, select the *Set Up a New User* button.



The **Create New User** page will appear.

2. In the *User information* table complete the user's details and define their billing group.
3. In the *Brand permissions* table on the same window, assign their brand access. Click ***Save*** to save your changes.



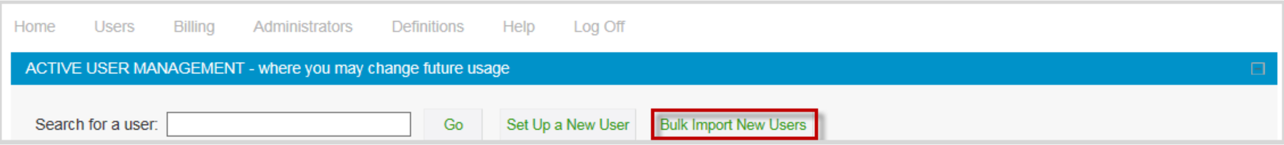
Note: The majority of clients will only have one or two brands in the Brands Permissions window.

Bulk Importing Multiple Users

There are two ways to bulk import multiple users in the Client Portal – you can either paste a list into the text box field or upload a CSV file. You can import up to 500 users each time, and each user will be added to the specified billing group, therefore you can only import one billing group at a time during Bulk Import.

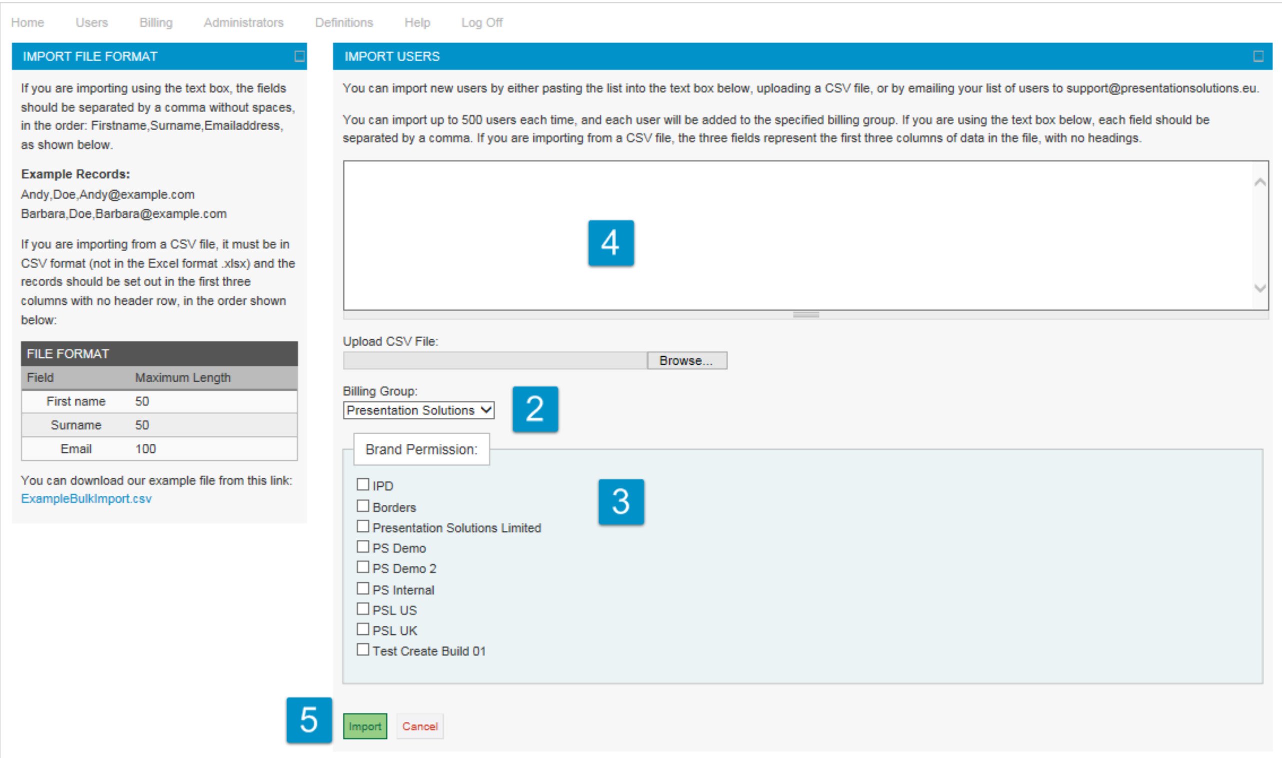
Setting up Multiple Users – as Text

1. On the **Home** page, in the **Active User Management** section, select the *Bulk Import New Users* button.



The **Import** page will appear.

2. Select the *Billing Group* for this batch of users.
3. Select the *Brand Permissions* for this batch of users.



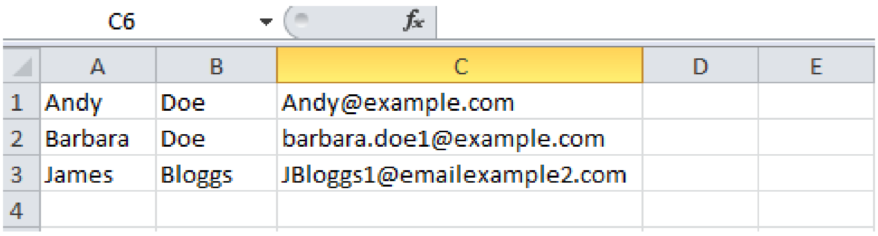
4. Enter the single or multiple users. Each field should be separated by a comma, as shown below and there should be no spaces.

```
Andy,Doe,Andy@example.com
Barbara,Doe,Barbara@example.com
```

5. Click ***Import*** to import the users' details.

Setting up Multiple Users – from a CSV File

Using this method you can import up to 500 users each time. When bulk importing via CSV, please note that you can only select one Billing Group per upload, therefore your user list must be split into separate CSV worksheets and uploaded separately, selecting the relevant billing group. If you are importing from a CSV file, it must be in CSV format (not in the Excel format .xlsx) and the records should be set out in the first three columns with no header row, in the order shown below:



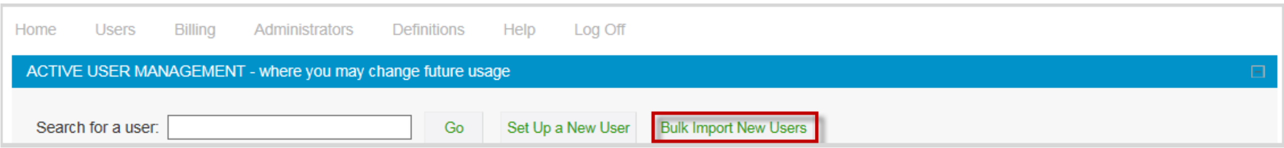
	A	B	C	D	E
1	Andy	Doe	Andy@example.com		
2	Barbara	Doe	barbara.doe1@example.com		
3	James	Bloggs	JBloggs1@emailexample2.com		
4					

If your data isn't in the right format for bulk uploading, click the link below to open a sample excel worksheet which you can use to enter the information of your users in the correct fields for uploading.

www.presentationsolutions.co.uk/downloads/client_portal/examplebulkimport.csv

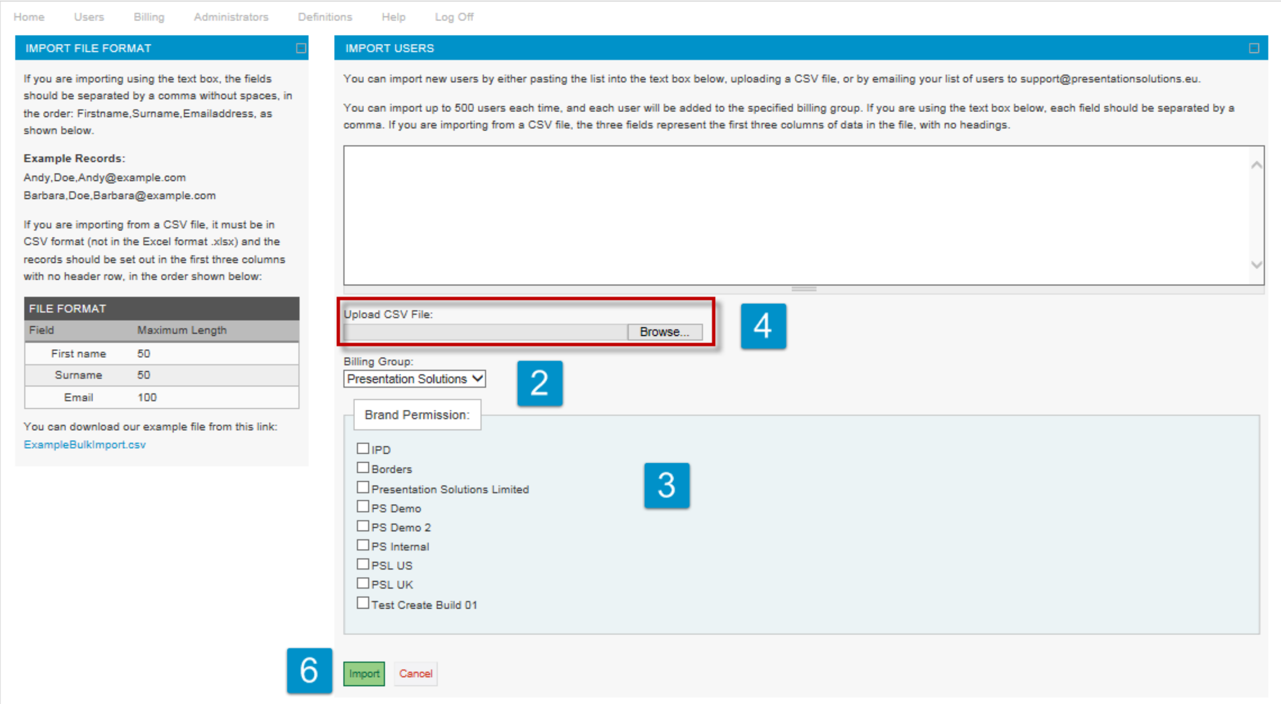
To import multiple users from a CSV file:

1. On the **Home** page, in the **Active User Management** section, select the *Bulk Import New Users* button.

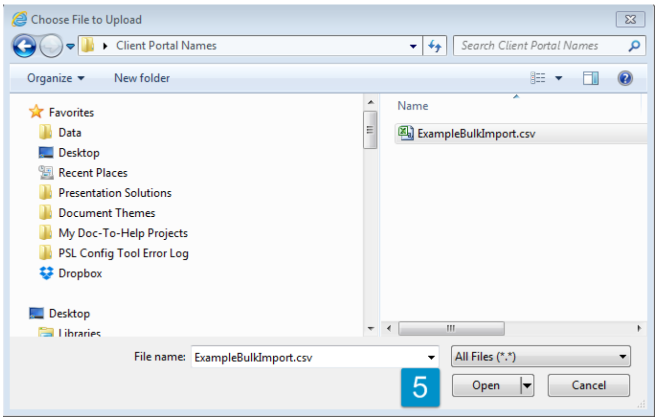


The **Import** page will appear.

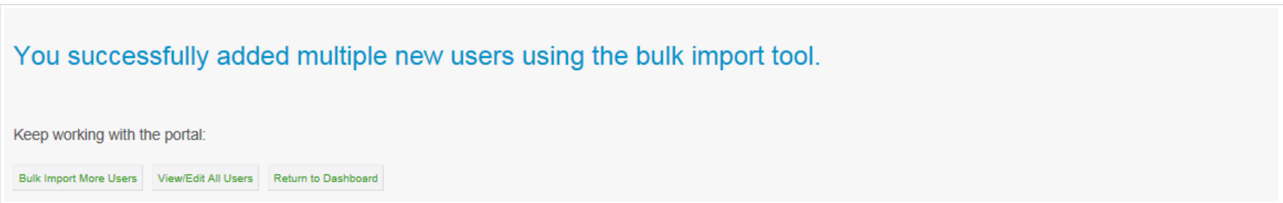
2. Select the *Billing Group* for this batch of users.
3. Select the *Brand Permissions* for this batch of users.
4. In the *Upload CSV File field*, click the ***Browse*** button.



5. Navigate to the file location for this batch of users and select ***Open***.



6. Your cursor will return to the Portal. At the bottom of the window, click ***Import***.
7. When successful, you will see the message "you successfully added multiple new users using the bulk import tool".



Please note when Bulk Importing:

If your list contains multiple billing groups, you must separate the information. You can only import one billing group batch at a time.

The brand to be assigned to users will be displayed when you upload the CSV file.

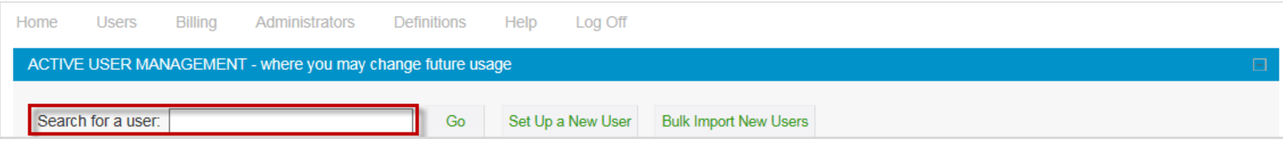
If you are having trouble with either of these methods, please contact support@presentationsolutions.co.uk.

Viewing Current Users

You can either search for a specific user or view a list of all current Create users in your organisation. This list can then be filtered according to the licence status of the user.

Searching for an Existing User

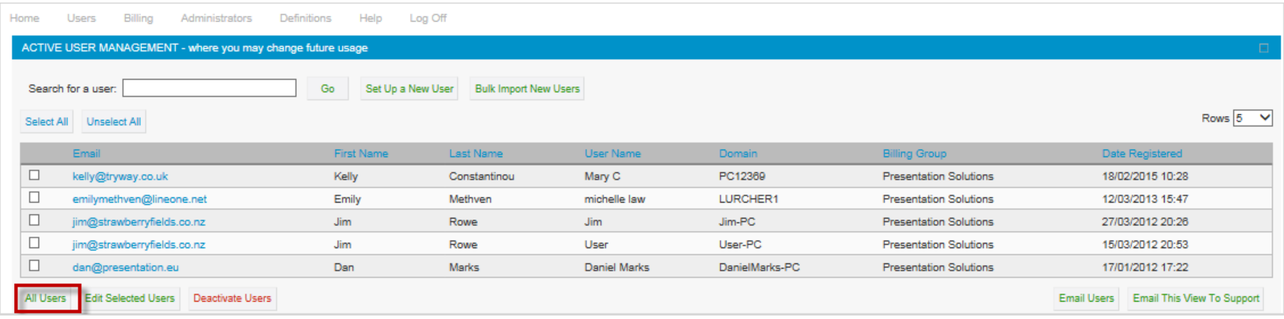
1. On the **Home** page, in the **Active User Management** section, type in the last name of the user in the *Search for a user* field and click *Go*.



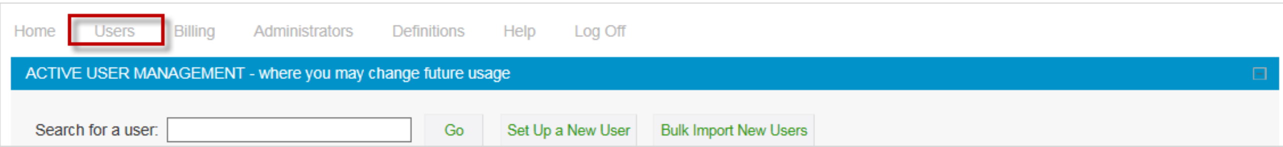
All users of the same name as the one you typed will appear in a new window.

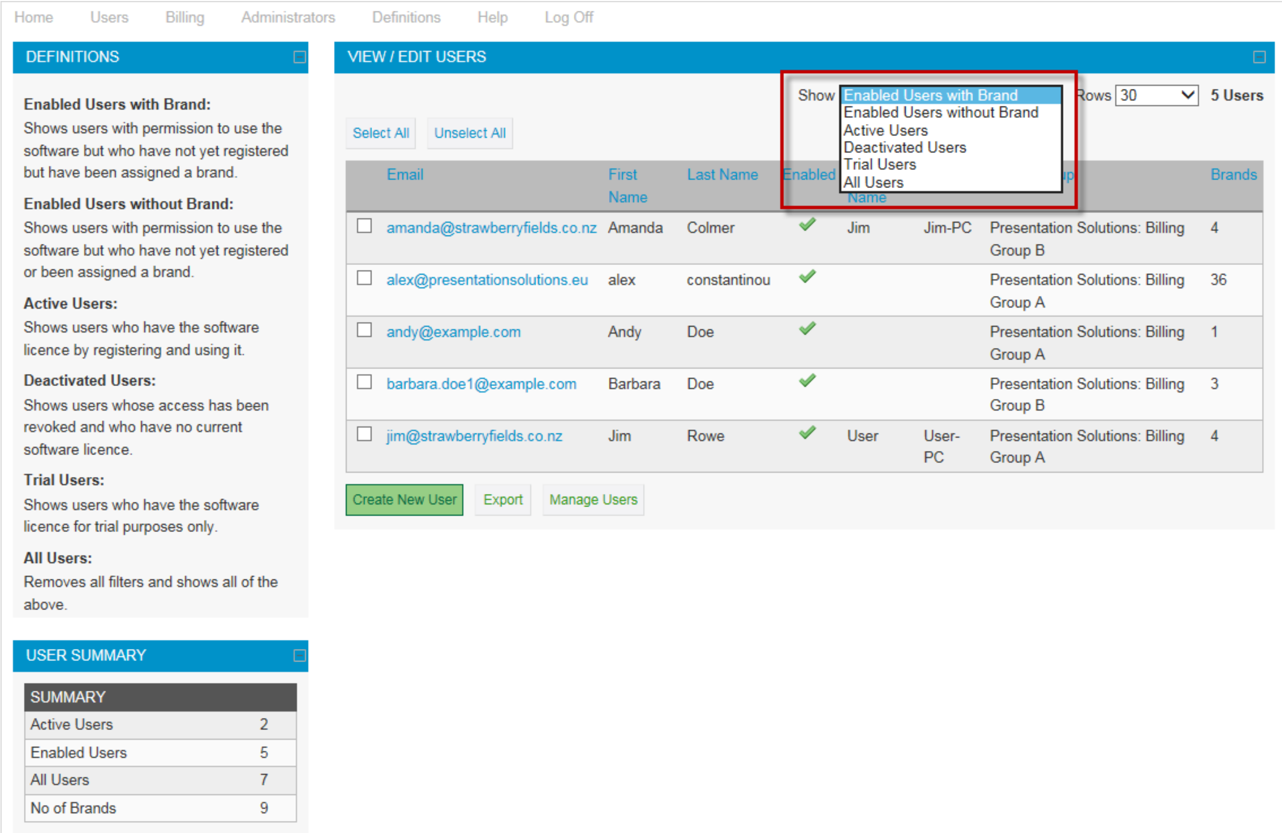
Viewing all Users

1. On the **Home** page, in the **Active User Management** section, select the *All Users* button.



2. OR select **Users** from the page names at the top.





3. The **View/Edit Users** page will appear. Select the ***Show*** dropdown arrow to choose the status of users that you wish to view. This will filter the list of users depending on your selection:

   Enabled Users with Brand – shows users with permission to use the software but who have not yet registered but have been assigned a brand

   Enabled Users without Brand – shows users with permission to use the software but who have not yet registered or been assigned a brand

   Active Users – shows users who have the software licence by registering and using it

   Deactivated Users – shows users whose access has been revoked and who have no current software licence

   Trial Users - shows users who have the software licence for trial purposes only

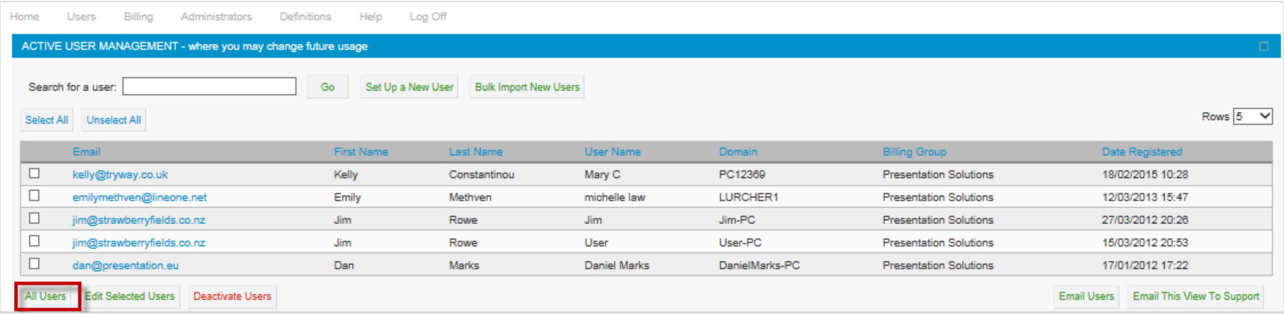
   All Users – removes all filters and shows all of the above.

Note: The list of users can be sorted in alphabetical order by clicking on the column headings, for example to sort users by First Name, click on the First Name column heading.

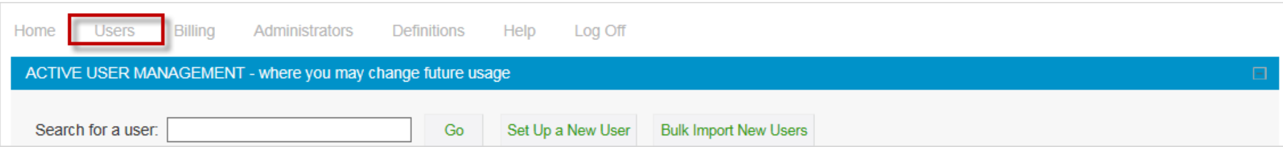
Email	First Name	Last Name	Enabled
elijah@presentationsolutions.eu	Elijah	Benjamin	✓
nicholas@presentationsolutions.eu	Nicholas	Henry	✓
carson@presentationsolutions.eu	Carson	Hudson	✓
sebastian@presentationsolutions.eu	Sebastian	Hunter	✓

Editing One User

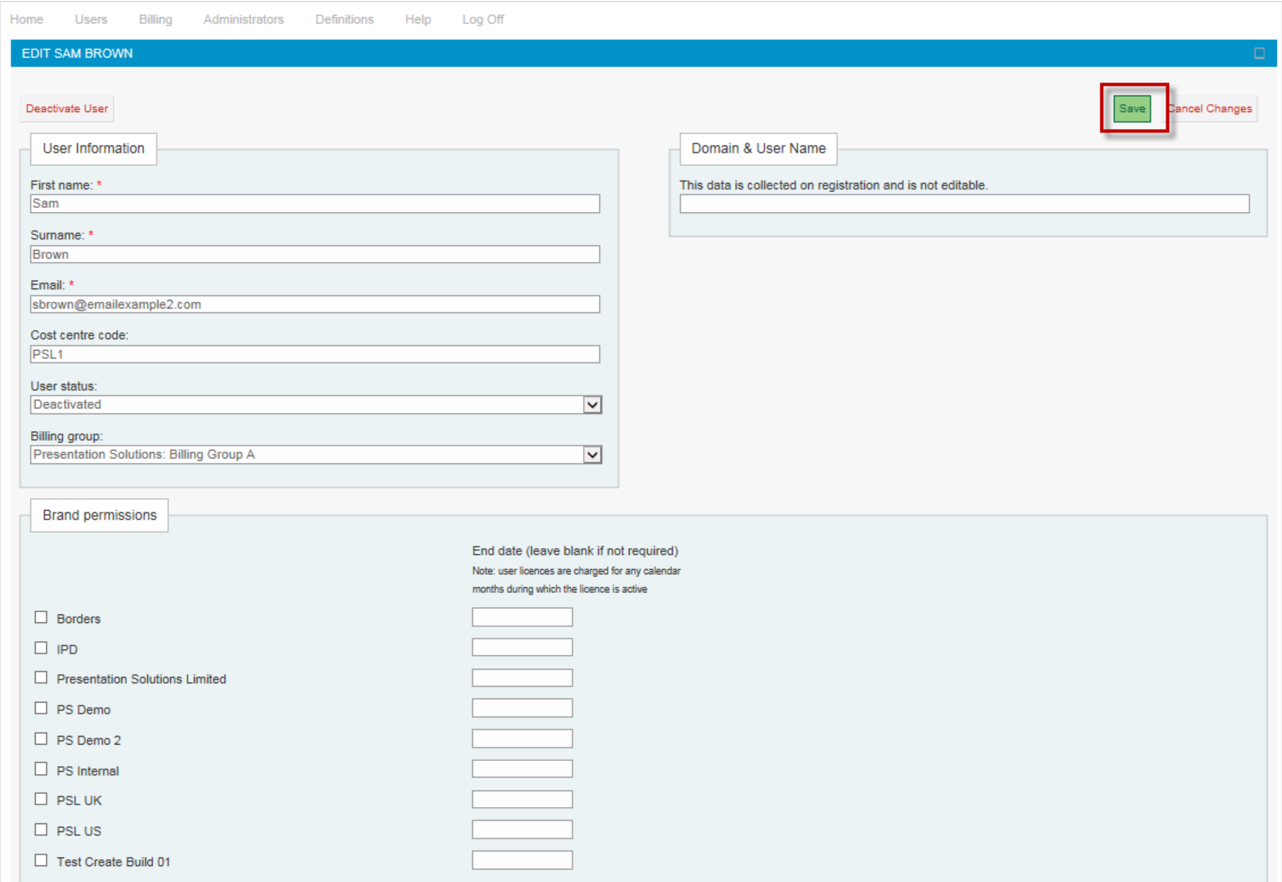
1. On the **Home** page, in the **Active User Management** section, select the *All Users* button.



2. OR select **Users** from the page names at the top.



3. To edit ***one user*** click on the email of the person you wish to edit in the list, their record details will be displayed.

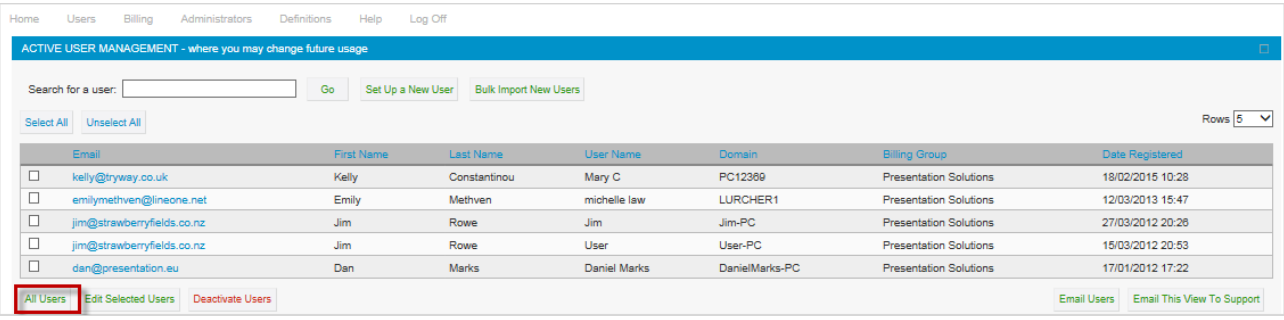


4. Make the changes you wish and click ***Save***.

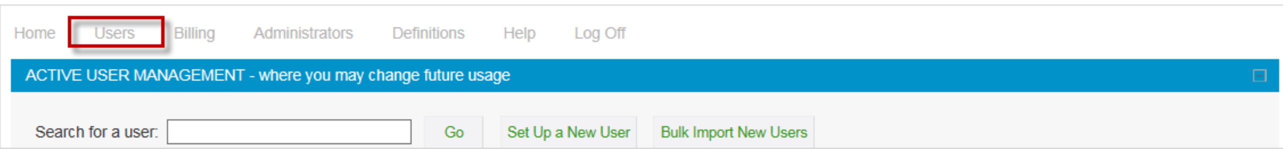
Editing Multiple Users

You can edit a number of user records at once. You can modify their account status or billing group and brand permissions or deactivate multiple users.

1. On the **Home** page, in the **Active User Management** section, select the *All Users* button.

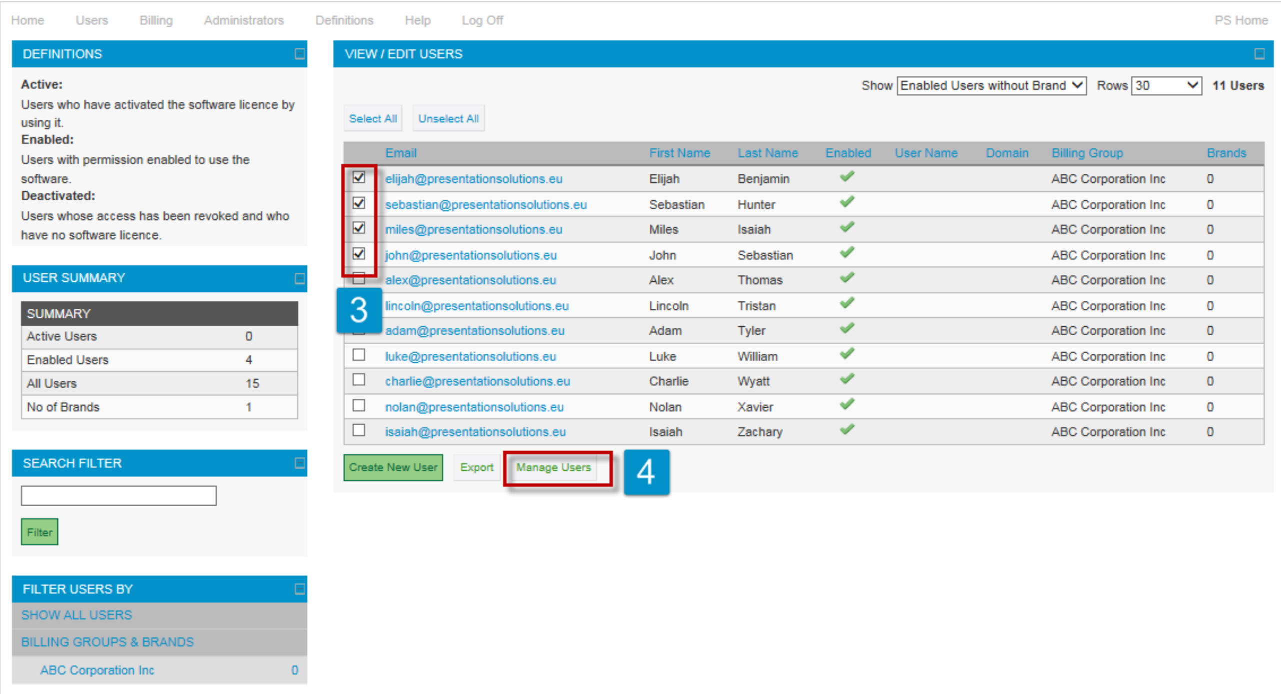


2. OR select **Users** from the page names at the top.

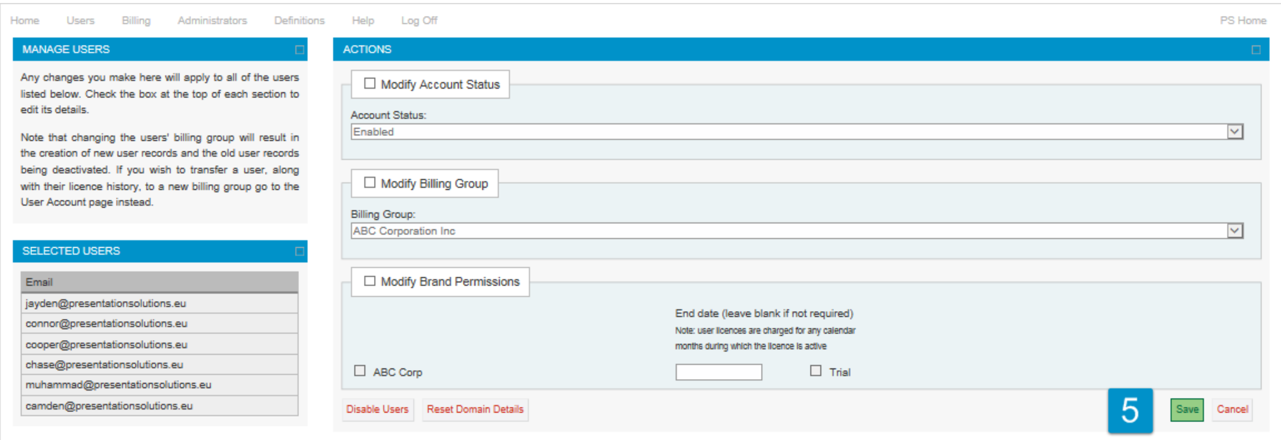


3. To ***edit multiple*** users, check the users you wish to edit all at once in the list.

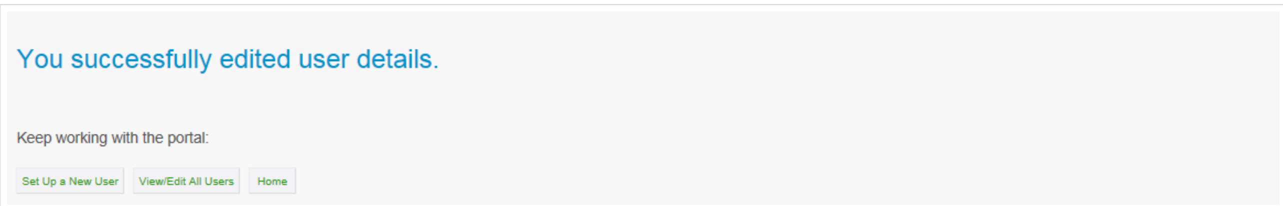
4. Then click the ***Manage Users*** button at the bottom of the window.



5. The **Manage Users** page will appear. Make the changes you wish and click ***Save***.

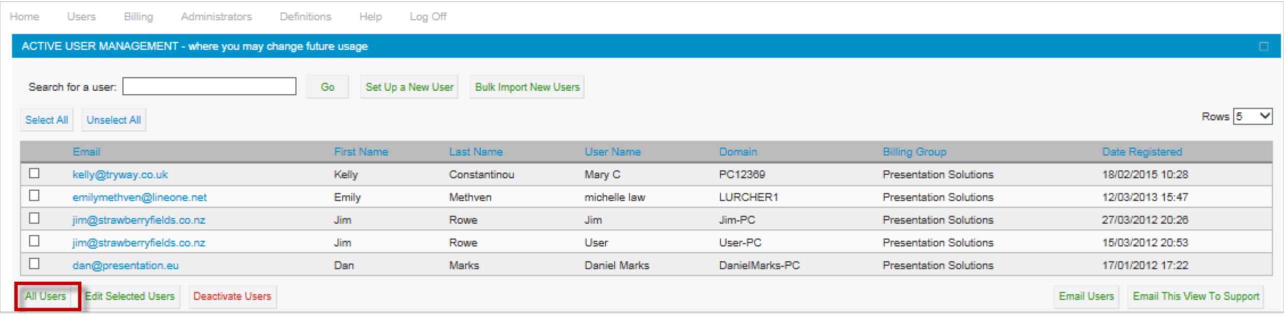


6. You will see the message "You successfully edited user details".

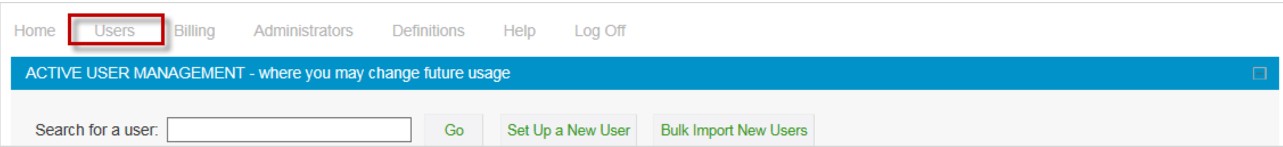


Deactivating Multiple Users

1. On the **Home** page, in the **Active User Management** section, select the ***All Users*** button.

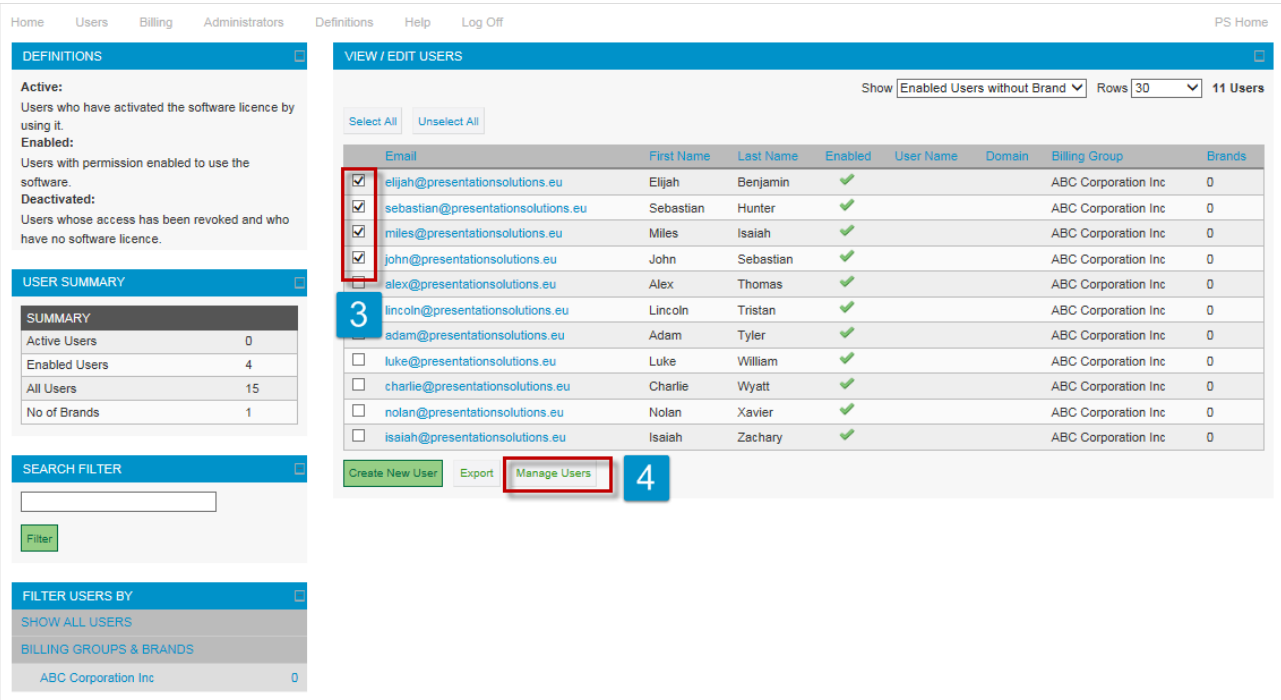


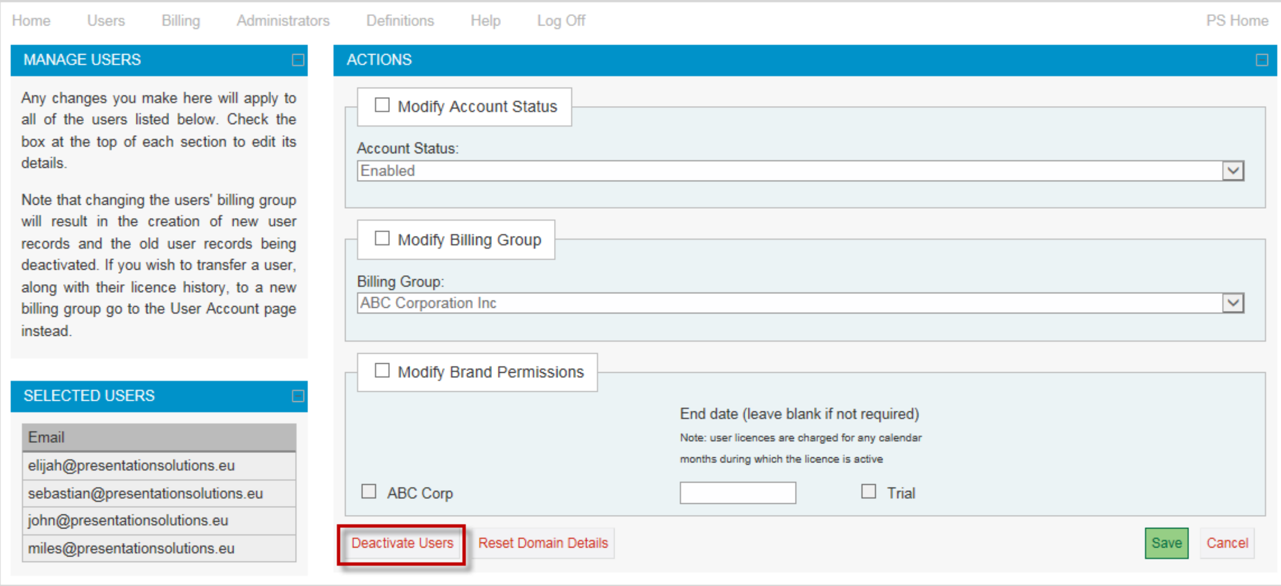
2. OR select **Users** from the page names at the top.



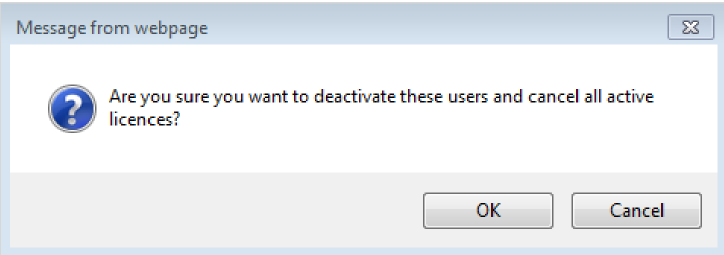
3. To ***edit multiple*** users, check the users you wish to edit in the list.

4. Then click the ***Manage Users*** button at the bottom of the window.

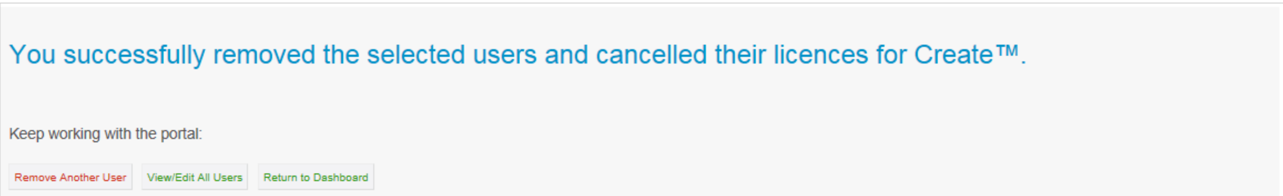




5. The **Manage Users** page will appear. Select ***Deactivate Users***. The following dialog will appear:



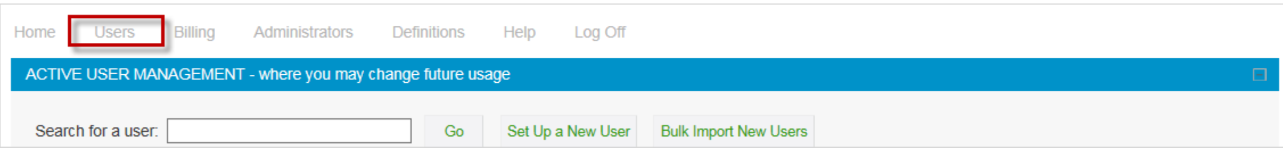
6. Click **OK**, and when successful, the following message will appear and the licences will be cancelled.



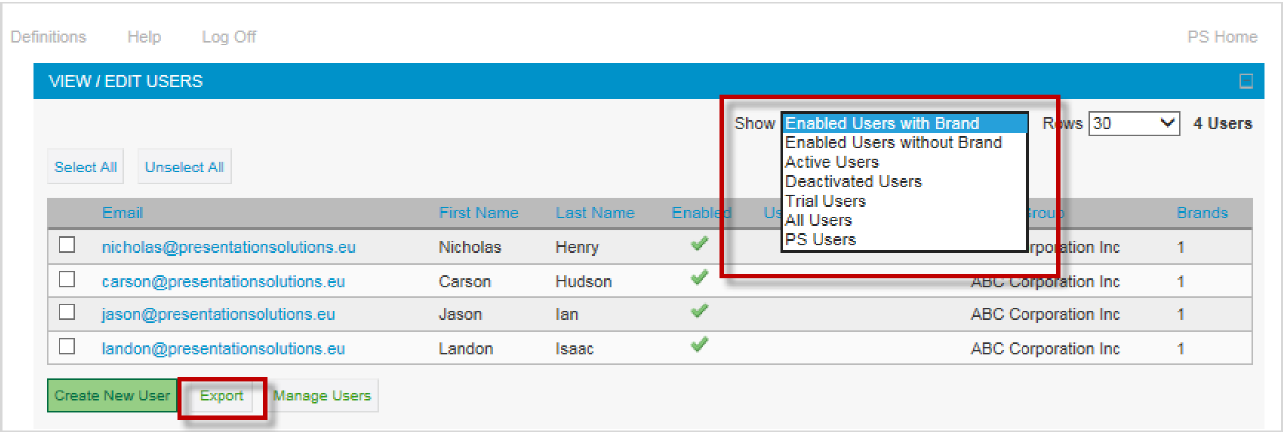
Exporting a List of Users

You can export a list of users, based on the various filters, to an Excel file:

1. Select **Users** from the page names at the top.



2. Select the filter you wish to apply from the ***Show*** dropdown.

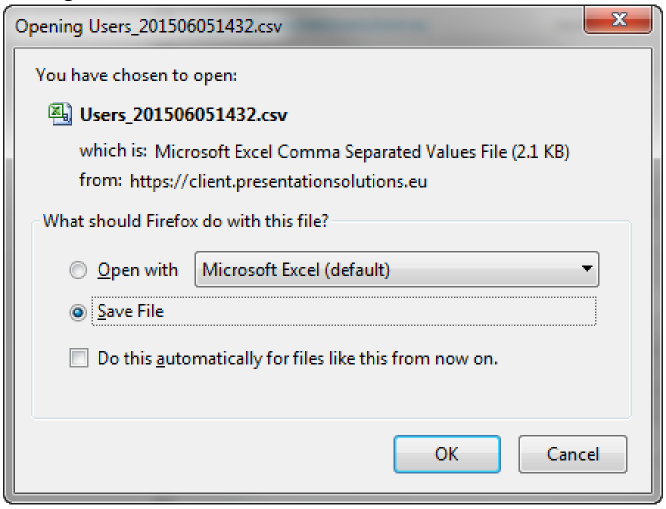


3. Select ***Export***.

4. The Portal will offer you the ability to open the CSV Microsoft Excel file or you can select to ***Save*** the file. At this point you may wish to change the file type from a CSV to an XLS.

Message in Internet Explorer

Dialog in Firefox



Assigning Brand Access to a User's Profile

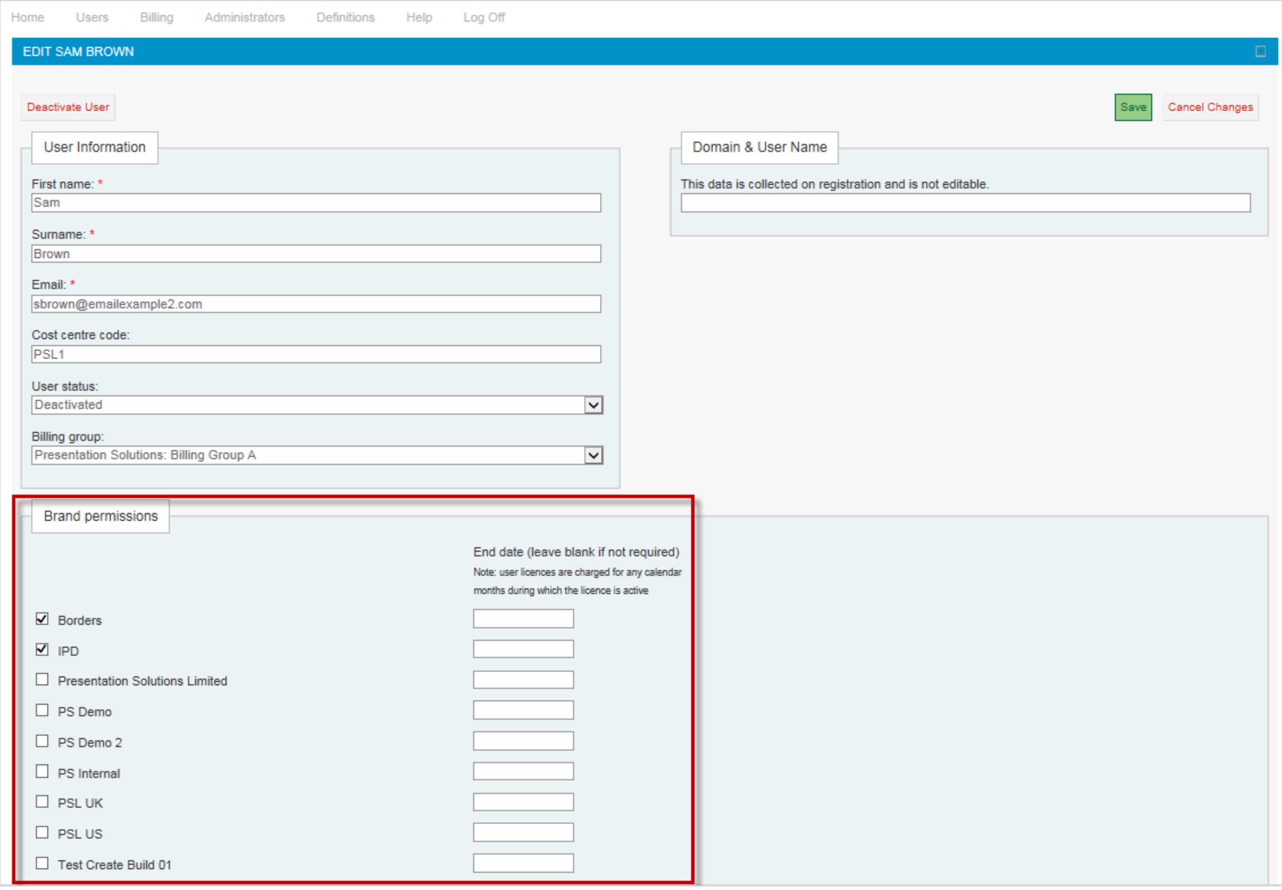
Your company may have more than one brand set up in Create. This might be for different business units, or when you are rebranding and want to transition from one brand identity to the other (e.g. Current brand, Old brand).

Each time a user registers a brand it represents a single licence in Create, which the user can access on multiple PCs.

When you deactivate a user it stops all licences associated with that user.

To assign brand access:

1. Click the user's email address in the user list on the ***Home*** page and in the **Edit** window that appears, check the brands that should be made available to the user and ***Save*** your changes.



See *Adding Users to a Billing Group* for more information.

5. Billing Information

What is a Create Licence, and how does the Billing Work?

A Create licence is an annual subscription which includes both the licence to use the software, and technical support. Only users which you have pre-authorised through set up in the portal can access the software, giving you complete control over your usage.

The number of active Create users is automatically recorded throughout each month.

If you Deactivate a user during any month they will still appear on the billing report for that month, however, they will not appear on the billing report for the following month unless the Administrator makes them an Active User again. Records of all users are still retained on the database for current invoicing and reconciliation of past invoices.

When an invoice is generated for a new billing period the billing system will take the number of active users on the last day of the previous billing period and use this figure to calculate the number of users and therefore the invoice amount for the new billing period.

When are Licences Activated?

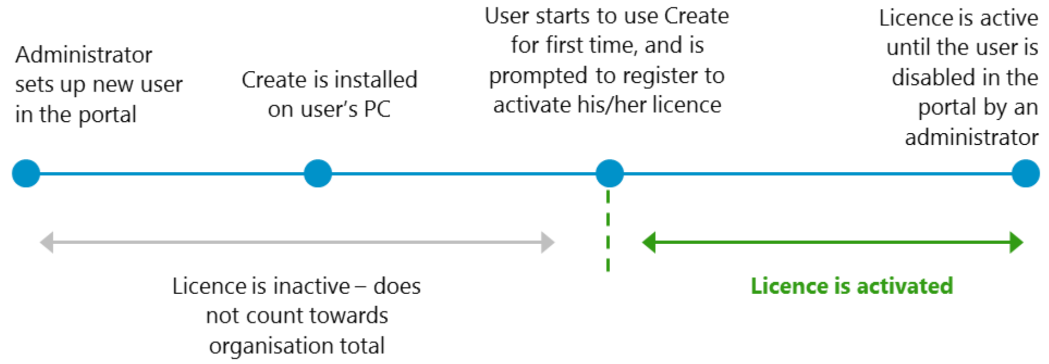
A user doesn't activate their licence until they start using with Create for the first time.

When they first use the software, they will be presented with a dialog to register their details. Once entered, the server will check the Client Portal to see if they have a valid licence set and if they do, allow them to register and begin using Create.

From that point on, the licence is Active and will count towards your organisation's usage.

Setting up a New User

The diagram below summarises the process for setting up a new user:

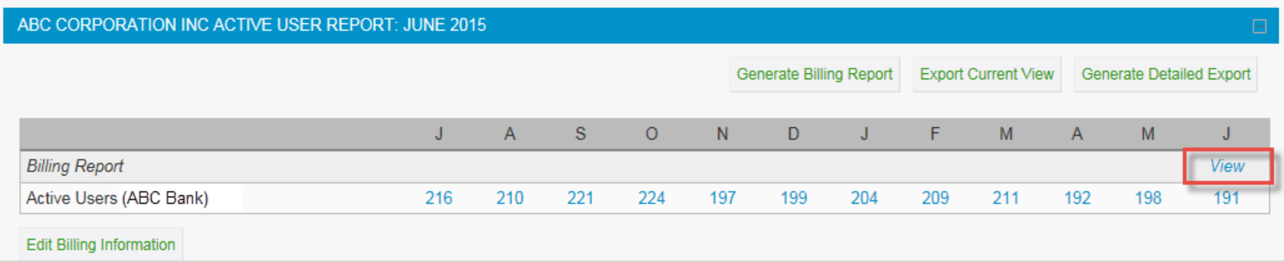


You can set up users anytime in advance, but you will only pay for their usage once they actually start to use the software.

Full details of your licensing terms are included in your organisation's Services Agreement with Presentation Solutions.

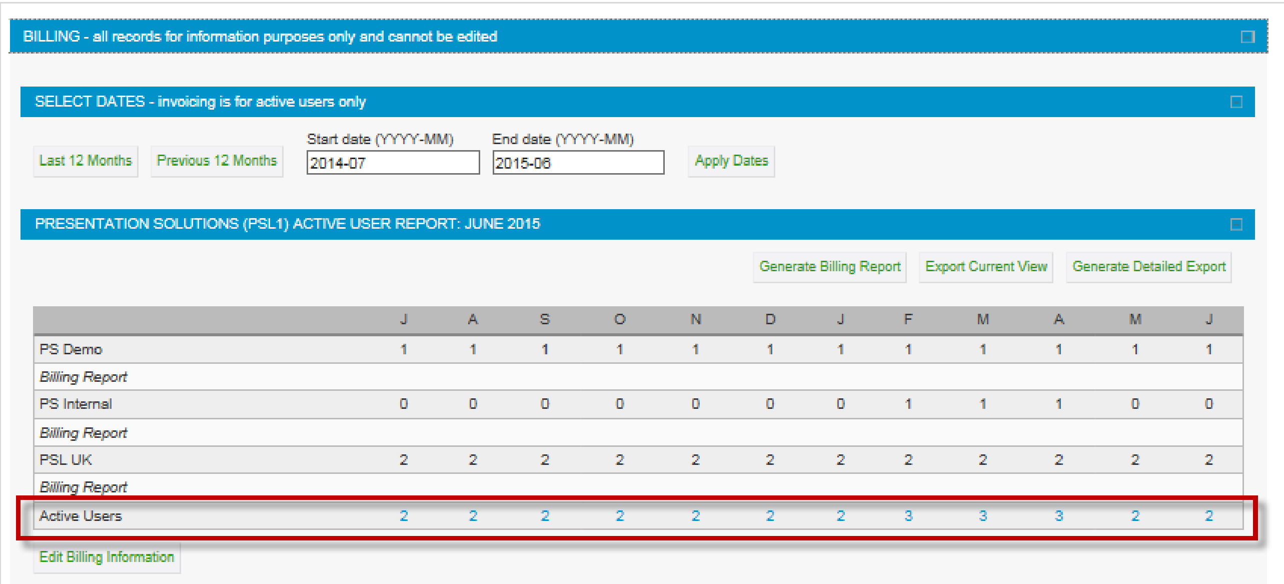
Viewing and Downloading Billing Reports

You can see a list of Active Users each month by client under the ***Billing*** summary, by clicking the *View* link under each month.



	J	A	S	O	N	D	J	F	M	A	M	J
Billing Report												*View*
Active Users (ABC Bank)	216	210	221	224	197	199	204	209	211	192	198	191

This summary report below shows ***one billing group***, with multiple brands, with Active Users being the net Total for all brands/active users.



	J	A	S	O	N	D	J	F	M	A	M	J
PS Demo	1	1	1	1	1	1	1	1	1	1	1	1
Billing Report												
PS Internal	0	0	0	0	0	0	0	1	1	1	0	0
Billing Report												
PSL UK	2	2	2	2	2	2	2	2	2	2	2	2
Billing Report												
Active Users	2	2	2	2	2	2	2	3	3	3	2	2

If you have ***multiple billing groups***, they will each appear as a separate line in the billing report, together with the individual brands, should you have more than one.

ALL BILLING GROUPS - BY BRAND

Export Current View | Generate Detailed Export

	J	A	S	O	N	D	J	F	M	A	M	J
PS Demo	1	1	1	1	1	1	1	1	1	1	1	1
PS Internal	0	0	0	0	0	0	0	1	1	1	0	0
PSL UK	2	2	2	2	2	2	2	2	2	2	2	2
Active Users	2	2	2	2	2	2	2	3	3	3	2	2

ALL BILLING GROUPS - BY BILLING GROUP

Export Current View | Generate Detailed Export

	J	A	S	O	N	D	J	F	M	A	M	J
Presentation Solutions: Billing Group A	1	1	1	1	1	1	1	2	2	2	1	1
PS Internal	0	0	0	0	0	0	0	1	1	1	0	0
PSL UK	1	1	1	1	1	1	1	1	1	1	1	1
Presentation Solutions: Billing Group B	1	1	1	1	1	1	1	1	1	1	1	1
PS Demo	1	1	1	1	1	1	1	1	1	1	1	1
PSL UK	1	1	1	1	1	1	1	1	1	1	1	1

If you have multiple billing groups, there will be a filter for each billing group. If you click on the number of users in any given group, you will see the report of Active Users for that period.

PRESENTATION SOLUTIONS: BILLING GROUP A (PSL1) ACTIVE USER REPORT: JUNE 2015

Generate Billing Report | Export Current View | Generate Detailed Export

	J	A	S	O	N	D	J	F	M	A	M	J
PS Internal	0	0	0	0	0	0	0	1	1	1	0	0
Billing Report												
PSL UK	1	1	1	1	1	1	1	1	1	1	1	1
Billing Report												
Active Users	1	1	1	1	1	1	1	2	2	2	1	1

Edit Billing Information

PRESENTATION SOLUTIONS: BILLING GROUP B (PSL2) ACTIVE USER REPORT: JUNE 2015

Generate Billing Report | Export Current View | Generate Detailed Export

	J	A	S	O	N	D	J	F	M	A	M	J
PS Demo	1	1	1	1	1	1	1	1	1	1	1	1
Billing Report												
PSL UK	1	1	1	1	1	1	1	1	1	1	1	1
Billing Report												
Active Users	1	1	1	1	1	1	1	1	1	1	1	1

Edit Billing Information

If you have only one billing group and one brand, then you will not see the option for billing groups or brands.

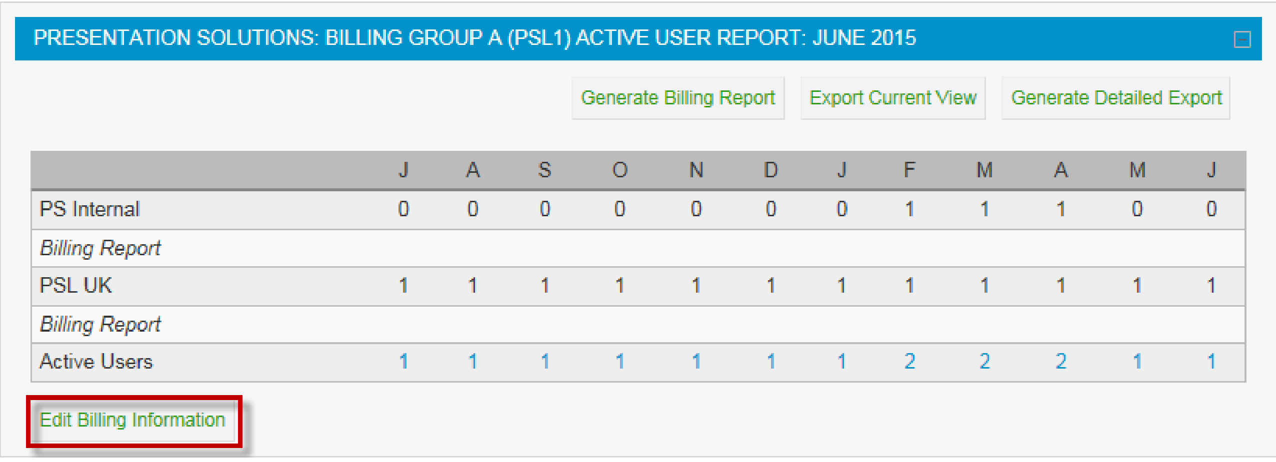
Adding a Billing Group

At present, only Presentation Solutions can set up new billing groups. If you wish to set up a new billing group please email us with the details for the new group. Administrators can change a billing group, however, please note that when updating a billing group, this will only affect records going forward. You cannot retrospectively amend the billing group.

Editing a Billing Group

Administrators may make changes to the address to which invoices should be sent.

1. Click the ***Billing*** navigation button, or on the **Home** page, navigate down the page to the *Billing Report* section.
2. Click on the ***Edit Billing Information*** button and update the fields in the window that appears.



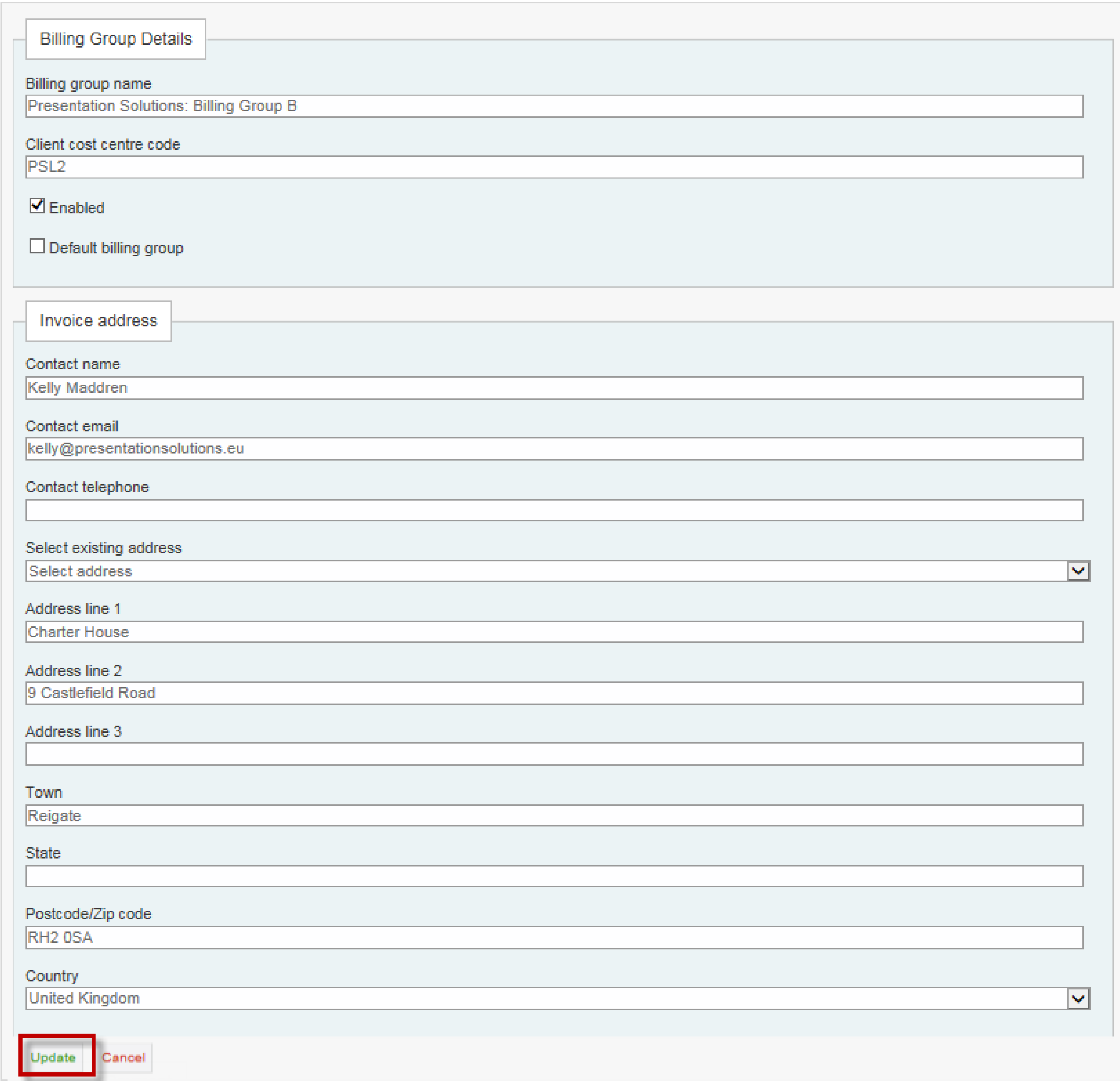
PRESENTATION SOLUTIONS: BILLING GROUP A (PSL1) ACTIVE USER REPORT: JUNE 2015

Generate Billing Report | Export Current View | Generate Detailed Export

	J	A	S	O	N	D	J	F	M	A	M	J
PS Internal	0	0	0	0	0	0	0	1	1	1	0	0
Billing Report												
PSL UK	1	1	1	1	1	1	1	1	1	1	1	1
Billing Report												
Active Users	1	1	1	1	1	1	1	2	2	2	1	1

Edit Billing Information

3. Once you have amended the billing group information, click the ***Update*** button to save the changes.

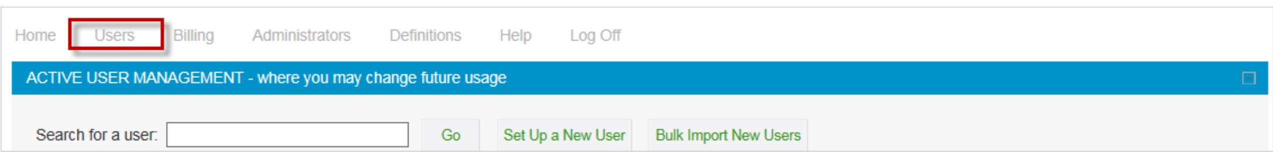


Adding Users to a Billing Group

You may have a single billing group for your entire company, or you may wish to categorise users into different groups such as by location (e.g. London, New York, Chicago) or by department (e.g. Investment Banking, Capital Markets, Strategy Consulting).

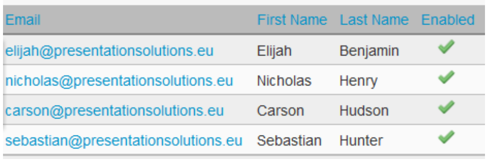
Adding a Single User to a Billing Group

1. Select the Users navigation button.



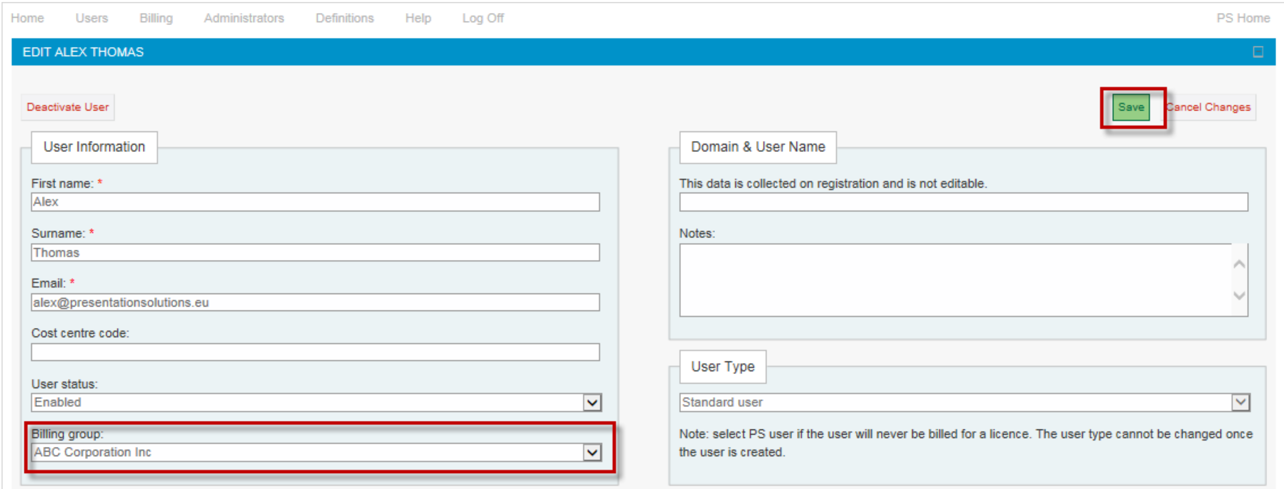
2. OR - On the **Home** page, in **Active User Management**, select the *All Users* button.

3. In the list click on the email of the user you wish to edit.



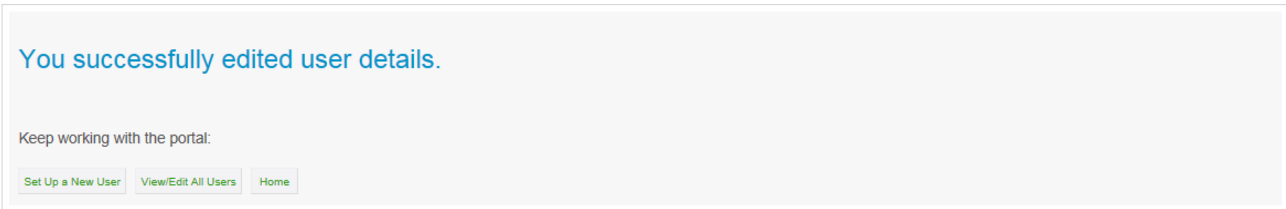
Email	First Name	Last Name	Enabled
elijah@presentationsolutions.eu	Elijah	Benjamin	✔
nicholas@presentationsolutions.eu	Nicholas	Henry	✔
carson@presentationsolutions.eu	Carson	Hudson	✔
sebastian@presentationsolutions.eu	Sebastian	Hunter	✔

4. In the *Billing Group* field, click on the dropdown to select the Billing Group.



5. Click the ***Save*** button on the top right.

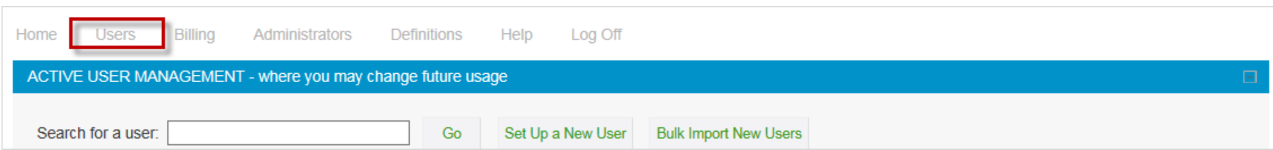
You will see this message when the update is successful.



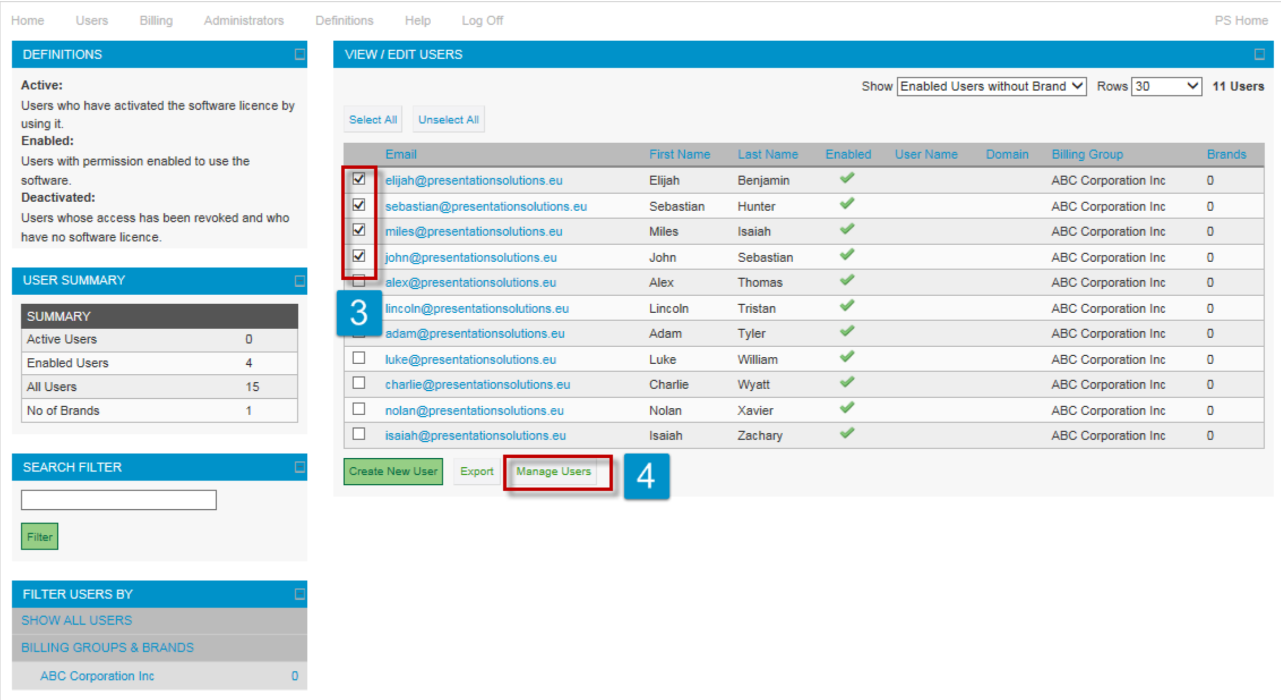
See [*Adding a Billing Group*]() for more information

Adding Multiple Users to a Billing Group

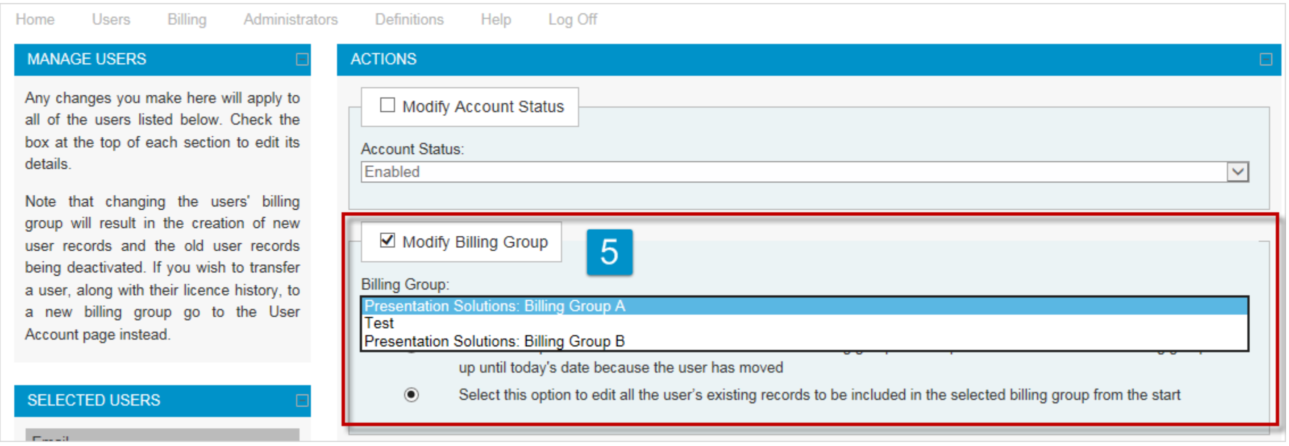
Select the **Users** navigation button; OR



2. On the **Home** page, in **Active User Management**, select the *All Users* button.
3. In the list check the users you wish to edit simultaneously.
4. Then click the ***Manage Users*** button at the bottom of the window.



5. The **View/Edit Users** page will appear. In the **Actions** Window, check the box *Modify Billing Group*. In the *Billing Group* field, click on the dropdown to select the Billing Group.



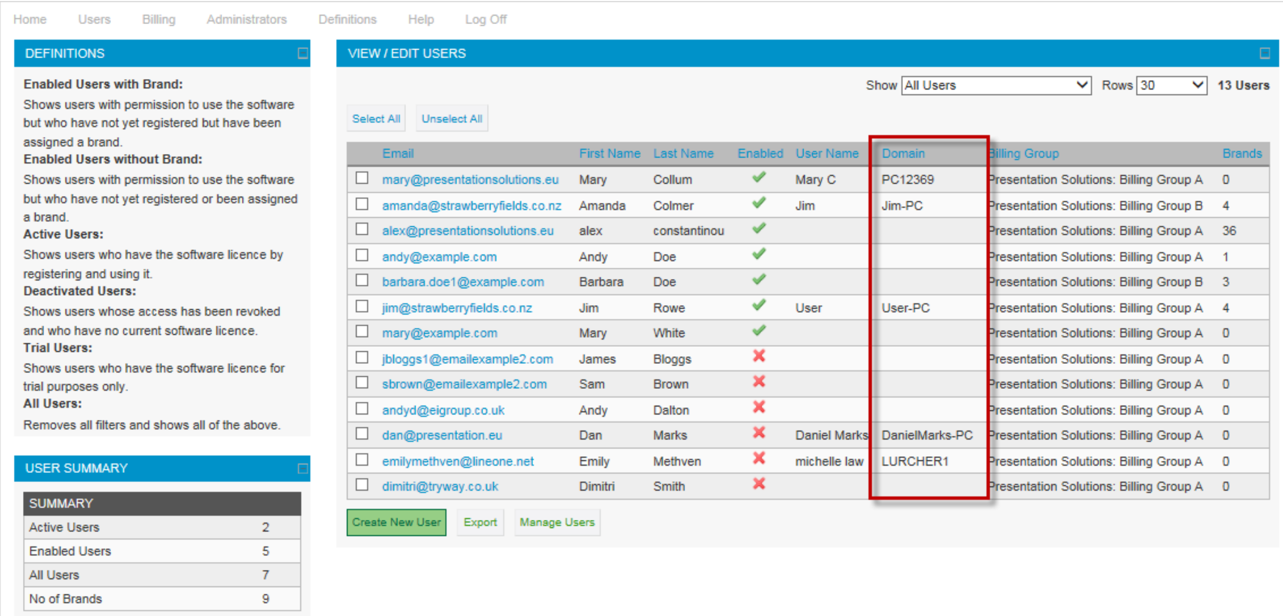
See [Managing Users](#) for more information.

Managing Domains

Domain information is collected automatically upon registration, per machine, per user and when we started working with your organisation, we established how your organisation wished to control the domains of users.

1. *Allowed domains* where your organisation chose to restrict usage of Create on approved PCs within the company domain; and
2. *Allowed domains not enabled*, where data is collected automatically.

Regardless of which method, all users will display the domain for the PC or laptop when they first register. Where there is no information, this means that the user has not yet used or registered their version of Create.



Allowable domains enabled

1. Users can only register ***from the domains set up on the list.***
2. One user can register from multiple machines which are on different domains in the list. For example, if domains are regional in ABC Corporation, a global organisation and a user moves from ASIAPAC to AMERICAS they will be able to register in both domains and move between them freely as long as they are both on the list.
3. If a new domain is required, this has to be added to the list before the user can register. For example, where consultancy firms who might log on to their laptops locally (i.e. the domain name is the same as the machine name), every new laptop must be entered into the portal before the consultant can register. To do this, please contact support@presentationsolutions.co.uk and we will add the new domain for you.

Allowable domains not enabled

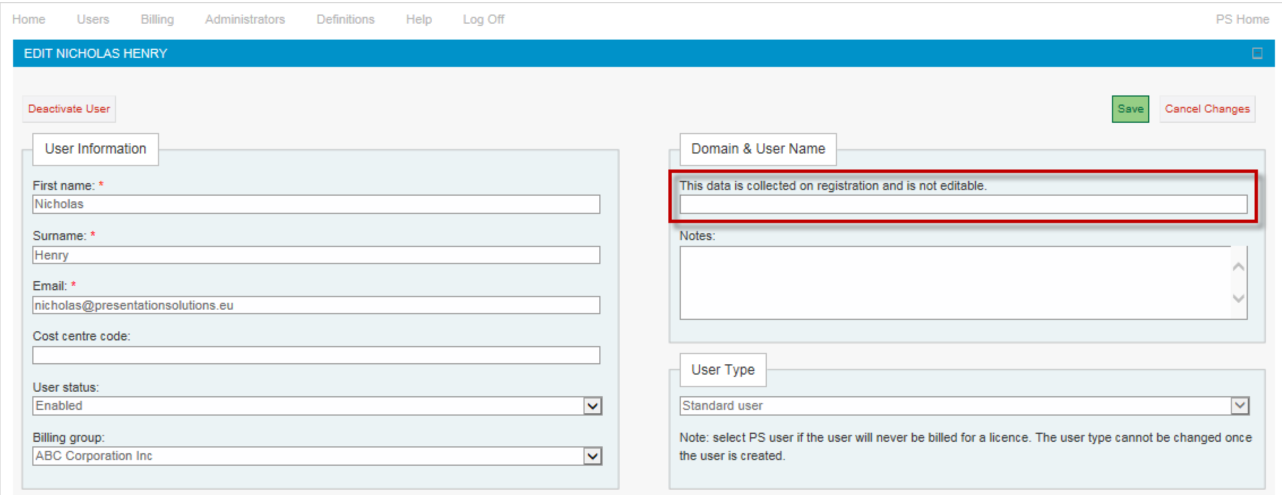
1. User can register from any domain on ***first*** registration.
2. Once registered, any subsequent registrations ***must be on the same domain as the first registration***. In the example of ABC Corporation, if user moves from ASIAPAC to AMERICAS they would not be able to register in AMERICAS without their licence being reset. Only Presentation Solutions can reset their licence and should they return to ASIAPAC, their licence would need to be reset again. Please send an email to support@presentationsolutions.co.uk and we will reset their domain.

Adding a New Allowed Domain Name

If your organisation opted to restrict domains which will prevent people using Create on PCs that are outside of Company's approved domains, but a user has changed domains and needs this adding, please contact support@presentationsolutions.co.uk and we will do it for you.

Viewing a Domain and User Name

If your organisation has not opted for this functionality, the information is collected automatically on registration and this field will be marked as uneditable/read only. If the user requires a change of Domain name (e.g. where a Laptop has a unique domain name and the user has changed laptops), this can be reset by us. To do this, please contact support@presentationsolutions.co.uk and we will do it for you.



Report Definitions

Depending on the report, a number of columns will populate with some of the following fields.

Column	Description
Reg. ID	The unique customer ID
Name	The combination of the user's first and last name currently stored against this user record
First name	The combination of the user's first and last name currently stored against this user record
Last name	The combination of the user's first and last name currently stored against this user record
User Email	The user email address currently stored against this user record
Domain/User Name	The domain and user name captured when the Create application last registers or validates the brand licence
Machine Name	The machine name captured when the Create application last registers or validates the brand licence
Brand	The brand assigned to the user or empty if no brand has been assigned
Status	The brand assigned to the user is either Active (in use), Enabled (Gives users the right to use Create software) or Deactivated (Users whose right to use Create software has been stopped)
Billing Group	The billing group to which the user is currently
Cost Centre	An associated client code can be added and linked to a billing group.
Current Brand Licence Enabled	A date value indicating when the current or last brand licence was assigned to a user (not necessarily registered).
Brand Enabled By	On manual licencing, where the licence is enabled via the Client Portal, this will record the username of the user who enabled the brand licence. On auto licencing this will be left empty as the brand licence is enabled via the product.
Brand Registered	A date value indicating when the Create application very first registered or validated a brand licence for this brand and user
Date Brand Licence Registered	A date value indicating when the Create application first registered or validated the current or last brand licence

Column	Description
Version First Registered	A value indicating the captured Create version number when the Create application first registered or validated a brand licence for this brand and user
Current Version	A value indicating the captured Create version number when the Create application last registered or validated the current or last brand licence
Last Version Validated	A version number indicating the version of Create that was validated.
Brand Licence Cancelled	Count of total brand licences that have been cancelled (past, present or future). This will not show a cancellation date if the user still has an active brand licence.
Current Brand Licence Cancelled By	Where the licence is deactivated via the Client Portal, this will record the username of the user who deactivated the brand licence.
Billable	Whether the licence enabled or active is chargeable or non-chargeable, this field states Yes. Note – you may see some of PSL staff entered here but these licences are set to No
Licence Last Validated	A date value indicating when the Create application last validated the current or last brand licence

6. Portal Administrators

Portal administrators can assign, view and edit user licences and billing details, and can generate reports. You can add and remove administrators using the *Administrators* link at the top of every page. All billing administrators can assign licences for any billing group or brand.

Setting up the First Portal Administrator

The first portal administrator has to be set-up by a member of Presentation Solutions Support team.

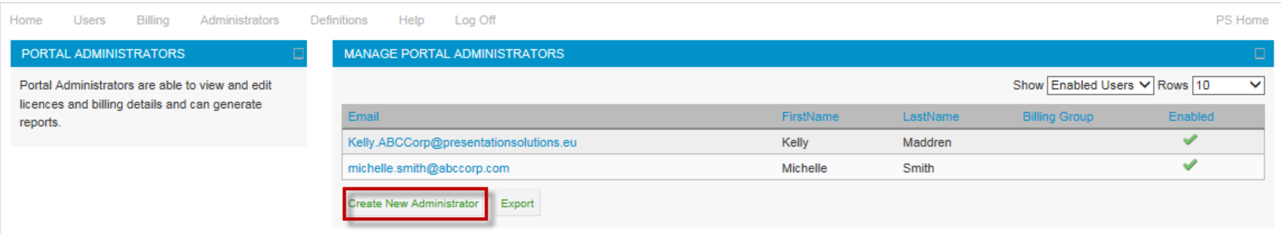
Managing Portal Administrators

Adding a Portal Administrator

To add a portal administrator:

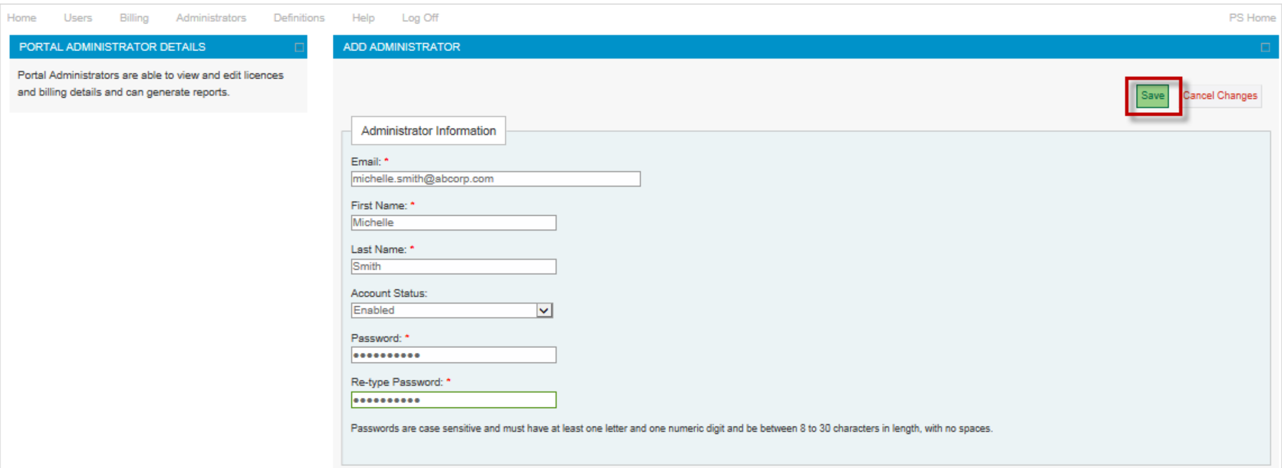
1. Click the **Administrators** link at the top of the page.

The *Manage Portal Administrators* page will open.



2. Click the **Create New Administrator** button.

The *Add Administrator* page will open



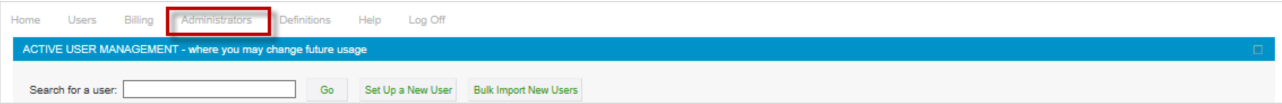
1. Enter the email, name, billing group responsibility (where applicable) and a password.

2. Click **Save** to add the administrator.

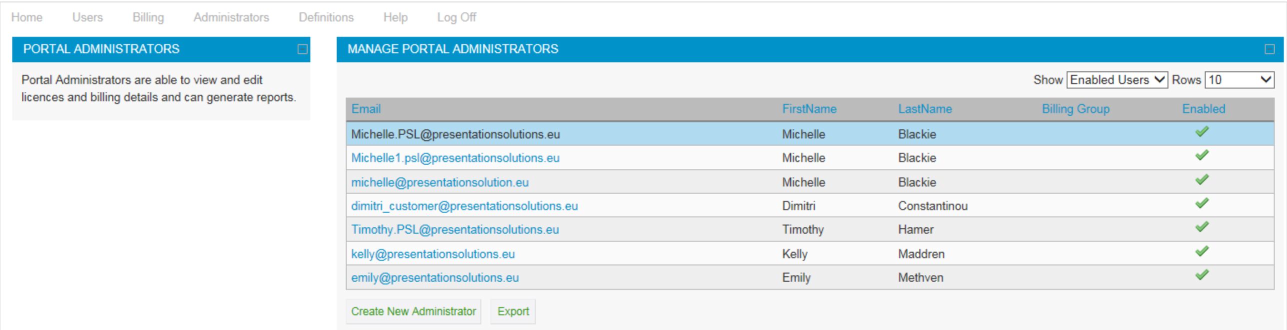
Editing a Portal Administrator

To edit an existing portal administrator:

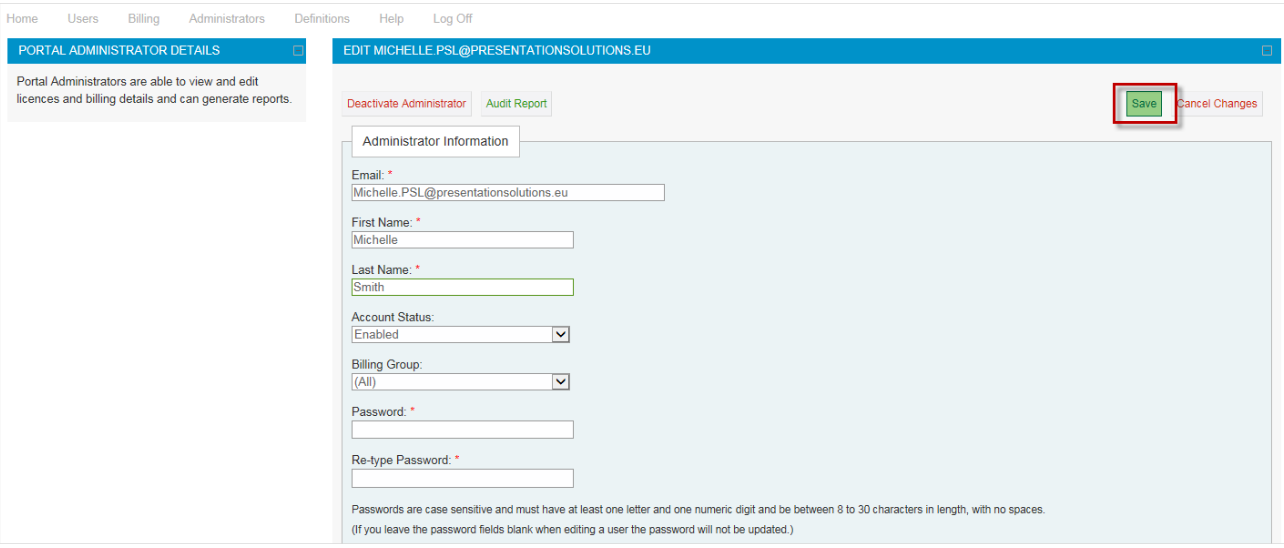
1. Click the **Administrators** link at the top of the page.



2. The *Manage Portal Administrators* page will open. Click on the administrator you wish to edit.



3. In the details field that appears, amend the information you wish.

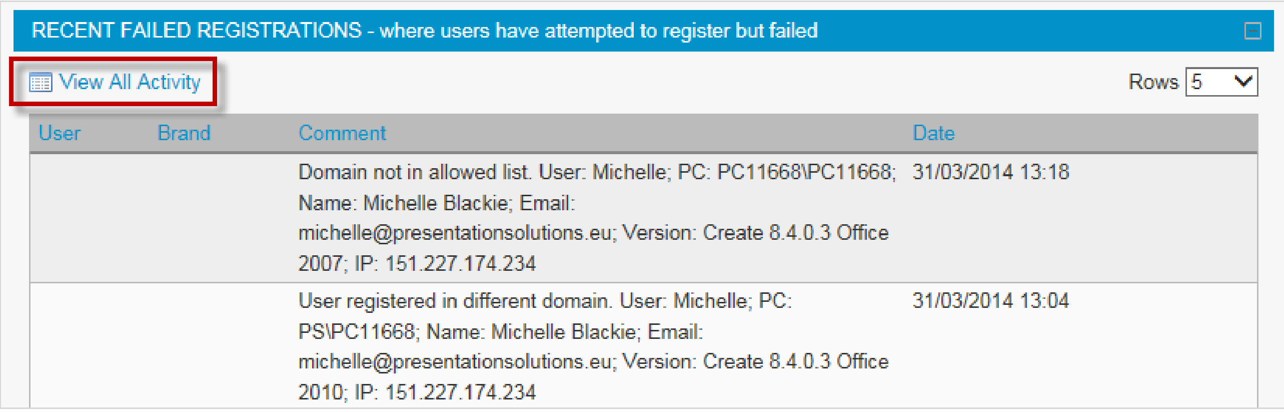


4. Click **Save** to update the selected administrator or **Cancel** if you wish to exit without saving the changes.

7. Licence Error Messages and Meanings

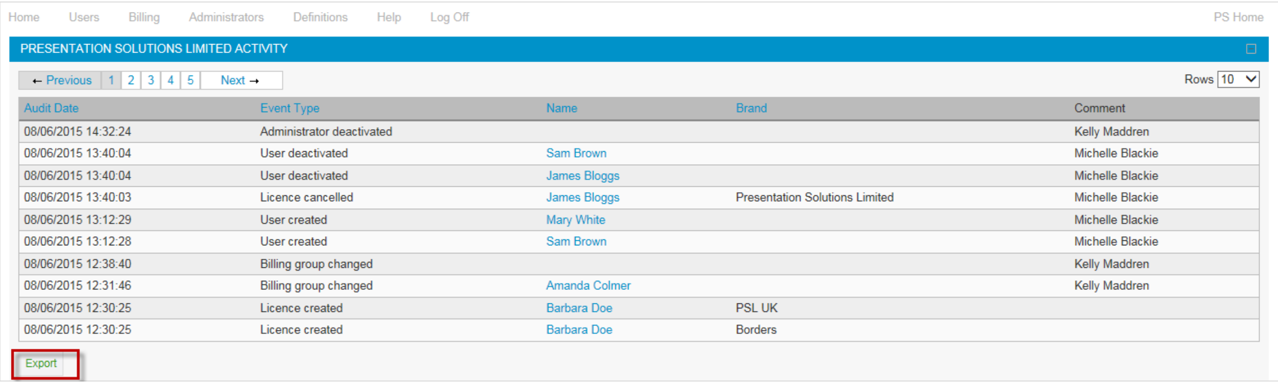
Failed Registrations

When a user attempts to register or validate and receives an error message, this will be stored against their profile and a report populated on the client portal ***Home*** page in the *Recent Failed Registrations* section.



User	Brand	Comment	Date
		Domain not in allowed list. User: Michelle; PC: PC11668\PC11668; Name: Michelle Blackie; Email: michelle@presentationsolutions.eu; Version: Create 8.4.0.3 Office 2007; IP: 151.227.174.234	31/03/2014 13:18
		User registered in different domain. User: Michelle; PC: PS\PC11668; Name: Michelle Blackie; Email: michelle@presentationsolutions.eu; Version: Create 8.4.0.3 Office 2010; IP: 151.227.174.234	31/03/2014 13:04

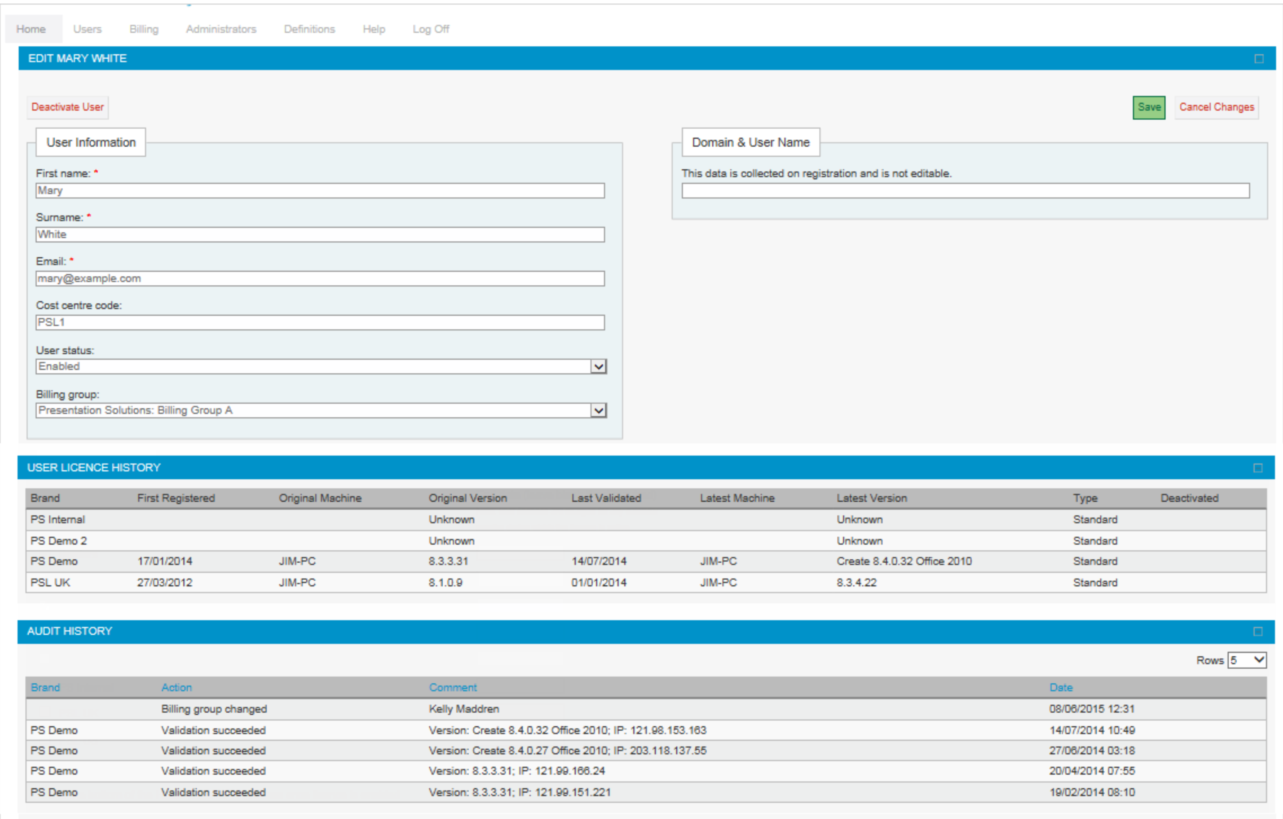
1. Click the *View All Activity* button to see a consolidated report of any licence-related problems people have had and also any changes to billing groups or status.



Audit Date	Event Type	Name	Brand	Comment
08/06/2015 14:32:24	Administrator deactivated			Kelly Maddren
08/06/2015 13:40:04	User deactivated	Sam Brown		Michelle Blackie
08/06/2015 13:40:04	User deactivated	James Bloggs		Michelle Blackie
08/06/2015 13:40:03	Licence cancelled	James Bloggs	Presentation Solutions Limited	Michelle Blackie
08/06/2015 13:12:29	User created	Mary White		Michelle Blackie
08/06/2015 13:12:28	User created	Sam Brown		Michelle Blackie
08/06/2015 12:38:40	Billing group changed			Kelly Maddren
08/06/2015 12:31:46	Billing group changed	Amanda Colmer		Kelly Maddren
08/06/2015 12:30:25	Licence created	Barbara Doe	PSL UK	
08/06/2015 12:30:25	Licence created	Barbara Doe	Borders	

2. Click ***Export*** to export this as a report.

3. Or click on an individual's name, to see their details, their licence history and the audit history.



Resolving Licence Error Messages

Below is a list of the specific error messages that can be given, an explanation and instructions for portal administrators on how to resolve these.

Error Message	Instructions
Domain not in allowed list	Client is set up with a list of allowable domains. The user is registering from a domain which is not on the list. Seek authorisation from client that user can register from this domain and email this instruction to support@presentationsolutions.co.uk, who will add the new domain to allowable domains list.
User registered in different domain	Client does not use an allowable domains list. The licence using this email address has been previously registered on a different domain. Investigate with client why the user's domain might have changed. If there is a legitimate IT change either to the domain for all users on the individual's pc that is going to be permanent you may need to reset the user's licence. This will occur more frequently with a client where the users log in locally to laptop and therefore the domain matches the machine name. In this case, if the user changes machine the domain name will change. Email an instruction to support@presentationsolutions.co.uk, who will reset the users' domain.

Error Message	Instructions
Not licensed for this brand	Client has more than one brand. User has a licence but not for the brand which they are trying to register. Likely scenarios: 1. User has accidentally switched brand. Advise user to switch back to brand for which they have a licence. They will then be able to continue working without needing to reregister. 2. New user who doesn't know how to select the brand which they wish to register. Send user instructions on how to register correct brand. 3. User wants to use a different brand but has not got a licence. Authorise additional brand licence. 4. User has been set up for the wrong brand, e.g. they want Brand B and their brand licence is for Brand A and does not include Brand B. Authorise, if required.
User disabled	User had a licence but it has been deactivated. Reactivate user and ask them to register again.
Licence cancelled	User has a user licence record but the brand licence has been cancelled. User will appear in list of "Enabled Users – Without Brands" rather than default user list view which is "Enabled Users – With Brands". Seek authorisation from administrator who deactivated to reactivate. It is likely in this case that the licence has been set up with an end date for an intern and the user has continued working for the company longer than the expected end date.
Email address not authorised	There is not a licence set up for this client which uses this email address. Likely scenarios: 1. User has made a mistake typing in their email address. Check server for successful registration as user may have immediately corrected their mistake. If not, email user to ask them to try again with correct email address. 2. User does not have a licence for Create®. Seek authorisation following the procedure in the client information workbook. 3. An existing user has changed their name and hence their email address, e.g. married.
Invalid user name	A user with this login name does not exist for client. Likely scenario: 1. The user has not registered before and has not entered an authorised email address into the registration dialog. 2. Check whether the user has entered the same registration information as stored the database (may be as simple as a typing error).

Error Message	Instructions
Email address assigned to another user	Licence using this email address has already been registered by a user logged in with a different login name. Likely scenarios: 1. User's login name has changed for some reason. They may be logging on to a different machine. Need to ascertain why the change and if it is permanent, update their records. 2. Another user is attempting to register Create® using a colleague's email address. Set the user up with their own Create user profile. Note: Sometimes it may be IT who are logged in with the wrong profile to attempt to register Create® for a new user, but they should be using the actual profile to register on a user's behalf. 3. An existing user has changed their name and hence their login name, e.g. married. Update their details.

8. Installing and Troubleshooting Create

How do I get Create on a user's PC?

How you install Create depends on your company's IT policies.

Your nominated IT contacts for Create are listed on the portal **Home** page, under the Contacts section at the bottom of the page. They will be able to advise you how to install Create, which might be through a download link or using an internal deployment method ("packaged installation").

You can update these details by clicking on the names of each IT contact.

My PC has been rebuilt and Create is no longer installed

Install Create (or ask your IT consult to enable this for you) and select any item in the Create ribbon to prompt the registration box to appear. Register as normal. As a licenced user you can have multiple versions of Create installed on any company computer within your organisations domain.

One of my users is getting an error message when trying to use Create

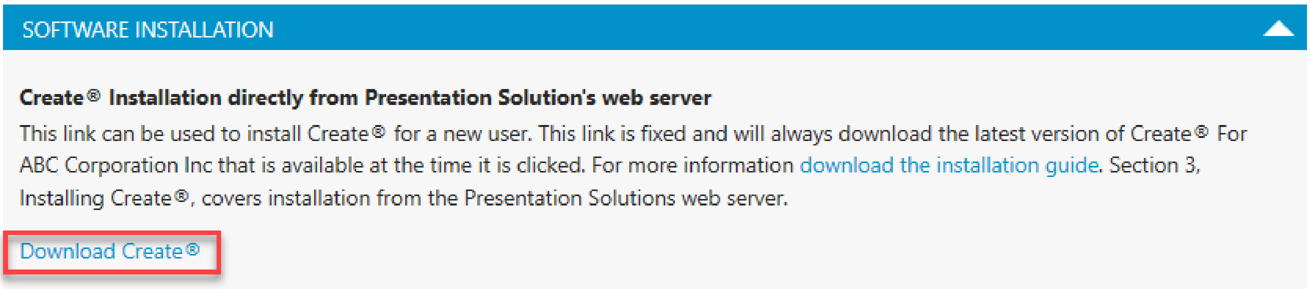
When a user attempts to register or validate and receives an error message, this will be stored against their profile and a report populated in the *Recent Failed Registrations* section on the ***Home*** Page in the Client Portal. For a full list of the errors, their definitions and how a Portal Administrator can resolve these, see the Section *Licence Error Messages and their Meanings*.

Download link

At the bottom of the **Home** page is a link to download the latest version of Create for your organisation. This will always be the latest version, even we you have recently updated your build.

If your organisation manages the installation locally (packaged), then this will be indicated here, together with contact details.

There is also a link to download the latest installation manual for your Create version.



Presentation Solutions Support

Our Support team are available throughout the year and can be contacted as follows:

Via Email

We recommend the first point of contact should be via email to our Support Helpdesk.

support@presentationsolutions.co.uk

Or telephone our UK or US office on the numbers below. In both offices, phones are answered 24x7, however support queries will be responded to during Office business hours.

UK Office

Tel +44 845 543 8228
Chapter House,
33 London Road,
Reigate,
Surrey, RH2 9HZ
United Kingdom

US Office

Tel +1 312 283 8505
Willis Tower,
84th floor,
233 South Wacker Drive,
Chicago IL 60606
United States

Presentation Solutions Limited

United Kingdom
Chapter House
33 London Road
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Surrey RH2 9HZ

T +44 333 939 0100

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155 North Wacker Drive
Suite 4250
Chicago IL 60606

T +1 312 283 8505

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