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# Key Differences Managing Users in Classic and New View and What's Coming Soon

Emily Svensson  
Product Manager at Autodesk

Noelle Ruiz  
Business Models & Pricing Communications at Autodesk

## Learning Objectives

- Key differences between Classic and New
- Roles in user management
- Inviting and Assigning users
- Tips and tricks for the New user management

## Description

Learn key differences between the classic and new view of user management and activation to be a more efficient Autodesk admin. One of our Autodesk Account Product Managers will show you the improvements we've made to your user management and activation experience, and they'll give you their tips for common tasks. The goal of this class is to equip you with a better understanding of what's changed, how to use the new experience to your advantage, and why it can speed up your workflow.

## Speaker(s)

Emily Svensson is one of the Product Managers for Autodesk Account, focused on user management to improve the way admins give their users access to software.

Noelle Ruiz works with our business models team to bring new customer offerings and flexible purchasing options to market for Autodesk customers.

## **Key differences between Classic and New**

The new user management is more than just a UI change – it is a new system with improved capabilities. The new system was designed with input from admins. It is also more scalable and reliable. Users assigned to products in the new system can login to their product within 60 seconds so they can spend less time waiting and more time designing.

### **Users are assigned to products, not subscriptions or contracts**

#### **New user management**

You are no longer assigning users by contract – you can either assign by user or assign by product. Users in the new view are not tied to your contracts or subscriptions – if you have available seats they will not lose access. You'll be able to get a user up and running with just one or two clicks, even if you have many subscriptions.

#### **Classic user management**

In classic view you assign users by contract. The users are tied to this contract and when it expires they will disappear. The users are not tied to a specific serial number on the contract. Once you add them to the contract you can choose a product on that contract to give them access to. Once you run out of seats of that product on the contract, your user will lose access automatically.

### **More Flexibility with admin roles**

#### **New user management**

You can self-service add as many admins as you need to help manage users, download products, and create support cases. By default, the first admin in the list is the Primary admin – you can change this at any time. Promote users to Secondary admin directly in the UI.

#### **Classic user management**

Admins are called software coordinators. You can only have one software coordinator per serial number, and they can manage all the users on that contract. To create a software coordinator you must contact support or go through AKN.

### **Scaling up and down**

#### **New user management**

When you need fewer seats or fewer contracts, just un-assign anyone who doesn't need the product anymore. You won't have to worry about Autodesk removing the wrong person – you know better than we do who should lose access!

#### **Classic user management**

In the classic view, your users are tied to your contract. If you want to increase or decrease your seat count and/or your number of contracts, you will need to be a little more strategic about which contract your users are assigned to. If you have multiple contracts and want to expire one, make sure to move any users over to a different contract first so they don't lose access.

## **User Management Roles**

### **Classic User Management**

#### **Contract Manager**

The contract manager is the main point of contact on an Autodesk contract, and there can be only one per contract.

#### **Software Coordinator**

The software coordinator is a secondary administrator that helps manage users and notifications regarding new releases. The contract manager is initially assigned as the software coordinator, but they can reassign the role by contacting support.

#### **Named User**

A named user is an individual who has been assigned to a product by an administrator. The number of named users you can assign per product is determined by the total number of seats purchased for that product.

### **New User Management**

#### **Primary Admin**

Primary admins can assign users to software and services in Autodesk Account.

#### **Secondary Admin**

The secondary admin is assigned by the primary admin, or another secondary admin, to help manage users and their access to software.

#### **Named User**

A named user is an individual who has been assigned to a product by an administrator. The number of named users you can assign per product is determined by the total number of seats purchased for that product.

#### **Contract Manager**

Contract Managers in the new experience are responsible for managing the contract renewal and billing. In the new user management, the contract manager is by default your Primary admin, but does not have to be. If you'd like to keep their role separate (i.e. they are a procurement agent who doesn't manage users) you can self-service change them to a user.

## Inviting and Assigning Users

In classic user management users are invited and assigned to a specific contract. This means that the users are tied to the lifecycle of the contract – when the contract expires, your users disappear. In the new user management, users are assigned to a product regardless of contract. It is quicker to get users up and running, and easier to scale up and down based on your company's current needs. If your contract expires, your user will stay in the list unless you choose to remove them.

### New User Management – how to invite and assign users

Someone is asking you for access to a product or multiple products, how do you make sure they get the access they need? As an admin, it's your role to get someone up and running. You have a user list in your autodesk account ([manage.autodesk.com](https://manage.autodesk.com)), to give someone access you need to make sure they're invited to the list and assigned to the product. In this section, I'll show you how to get them up and running quickly.

#### How to set up a new user

##### **Option 1 – invite a new user, then assign access**

This method is useful when you are trying to get a new user set up with multiple products at once.

- Navigate to “by user” and click the “add users” button
- Enter your user in the following format: “first name, last name, email address;”
- Click “send invite” – you will see a confirmation message once the invite is completed
- Find the user in the list – click on them to go to their user details
- Click the checkbox next to the product(s) you want to give them access to
  - You can customize which cloud services they have access to by opening the product drawer. By default they'll be assigned to all cloud services unless you make any changes.
- Your user will get an email telling them exactly what they've been assigned to.
- The user will automatically have access to downloads and support for that product

##### **Option 2 – invite and assign a new user in one step**

This method is useful when you want to set up a new user with one product or set up many users with one product.

- Navigate to the “By Product” tab where you should see a list of all the products you manage
- Click on the product you want to assign them to - from here you'll see a list of users who currently have access
- Click the “add users” button at the bottom to invite the users
- Enter your user(s) in the following format: “first name, last name, email address”

- You can customize which cloud services they have access to by opening the product drawer. By default they'll be assigned to all cloud services unless you make any changes.
- Save your changes to complete the invite. Your user will get an invitation to create their account – once they've accepted that they will be able to login and get started.

## How to manage Product Access for an existing user

### Option 1 – manage by user

Do you have a user who's already in your list who needs product access? Do you need to make multiple user-specific changes? Utilizing the "by user" tab will be most efficient.

- Navigate to "by user" and click on the user you need to make changes to (use search and sort to find the user if you don't find them immediately)
- Click the checkbox next to whichever product(s) your user needs access to
  - You can customize which cloud services they have access to by opening the product drawer. By default they'll be assigned to all cloud services unless you make any changes.

### Option 2 – manage by product

Did you just subscribe to a new product? Did one of your teams suddenly start using a new product? Utilizing the "by product" tab is the easiest way to assign many users at once to a specific product.

- Navigate to "by product" and click on the product you're trying to assign
- Click "add users" at the bottom, a new screen will open up
- Click into the textbox and you'll see a drop-down with a list of all the users in your list
- Scroll down the list and click on the users you want to assign
  - Note that you can also invite a new user here at the same time if needed
  - You can customize which cloud services they have access to by opening the product drawer. By default they'll be assigned to all cloud services unless you make any changes.
- Click assign users to complete the assignment

## What really happens when I assign a user?

The user will get an email within 3 minutes telling them what products and services they newly have access to. Within 60 seconds they'll be able to login and use the product(s) they've been assigned to. The user will see downloads on the P&S page and can contact Autodesk support if needed.