

HOW TO CREATE AN ORGANIZATION, INVITE USERS, AND ASSIGN USER DEVICES TO LICENSES

How to Access a Cloud License for the First Time

<h3>1 Sign Up With RocPortal</h3> <p>The person who creates the RocPortal Organization will become the owner of the organization. They are automatically assigned as the Root (Owner) and will hold all privileges.</p>	<h3>2 Create an Organization Account</h3> <p>This is the main Platform for managing your cloud-based licenses and RocPortal permissions.</p>	<h3>3 Invite and Assign Users</h3> <p>To access the software, each end user must be a member of your organization and assigned access to a specific license.</p>
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Create a RocPortal Organization ("Org")

An organization needs to be created in RocPortal in order to manage licenses. The person who creates the RocPortal Organization becomes the Owner and can either manage the licenses themselves or delegate this task to designated Administrators after the initial sign-up. Use this [RocPortal link](#) to get started.

1. Sign up for a RocPortal account and create login credentials.

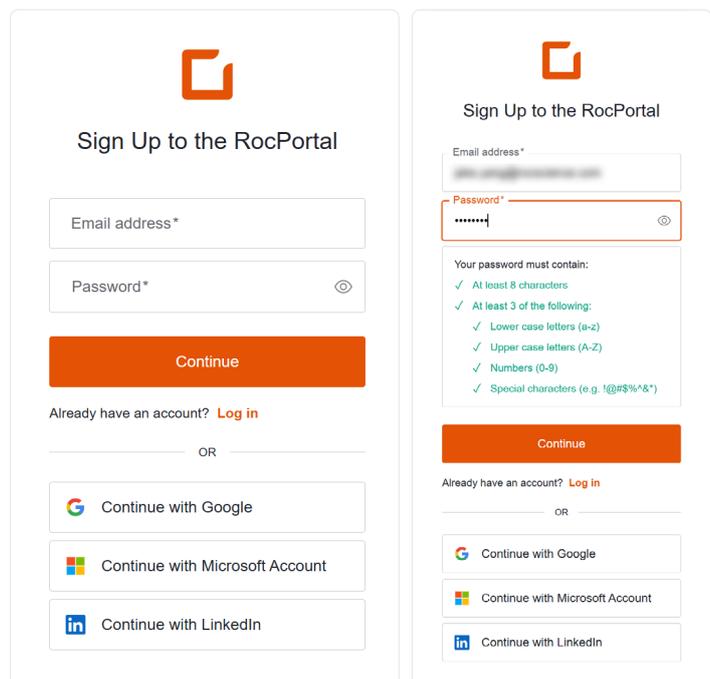
Welcome to the RocPortal

Log in or sign up below.

[Log In](#) or [Sign Up](#)

[Learn more](#)

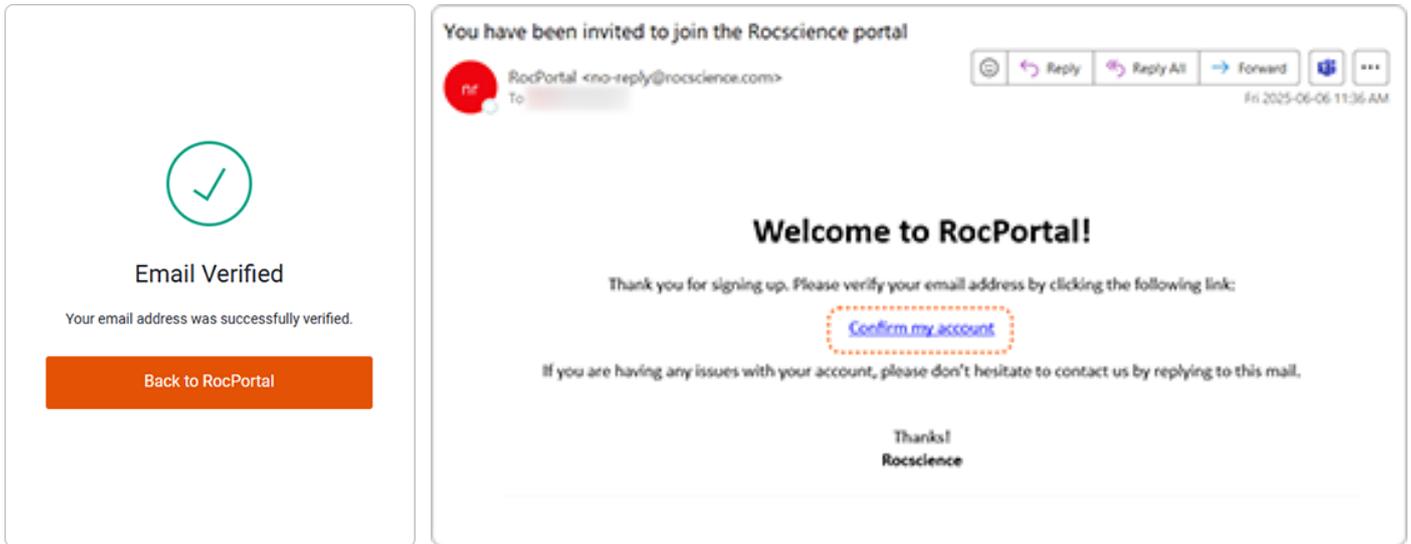
[Back to Rocscience Home!](#)



The image shows two screenshots of the RocPortal sign-up process. The first screenshot shows the 'Sign Up to the RocPortal' page with fields for 'Email address*' and 'Password*', a 'Continue' button, and options to 'Continue with Google', 'Continue with Microsoft Account', and 'Continue with LinkedIn'. The second screenshot shows the 'Sign Up to the RocPortal' page with a password strength indicator. The password field is highlighted in red, and the indicator shows: 'Your password must contain: At least 8 characters, At least 3 of the following: Lower case letters (a-z), Upper case letters (A-Z), Numbers (0-9), Special characters (e.g. !@#%*&*)'. There is also a 'Continue' button and a 'Log in' link for existing users.

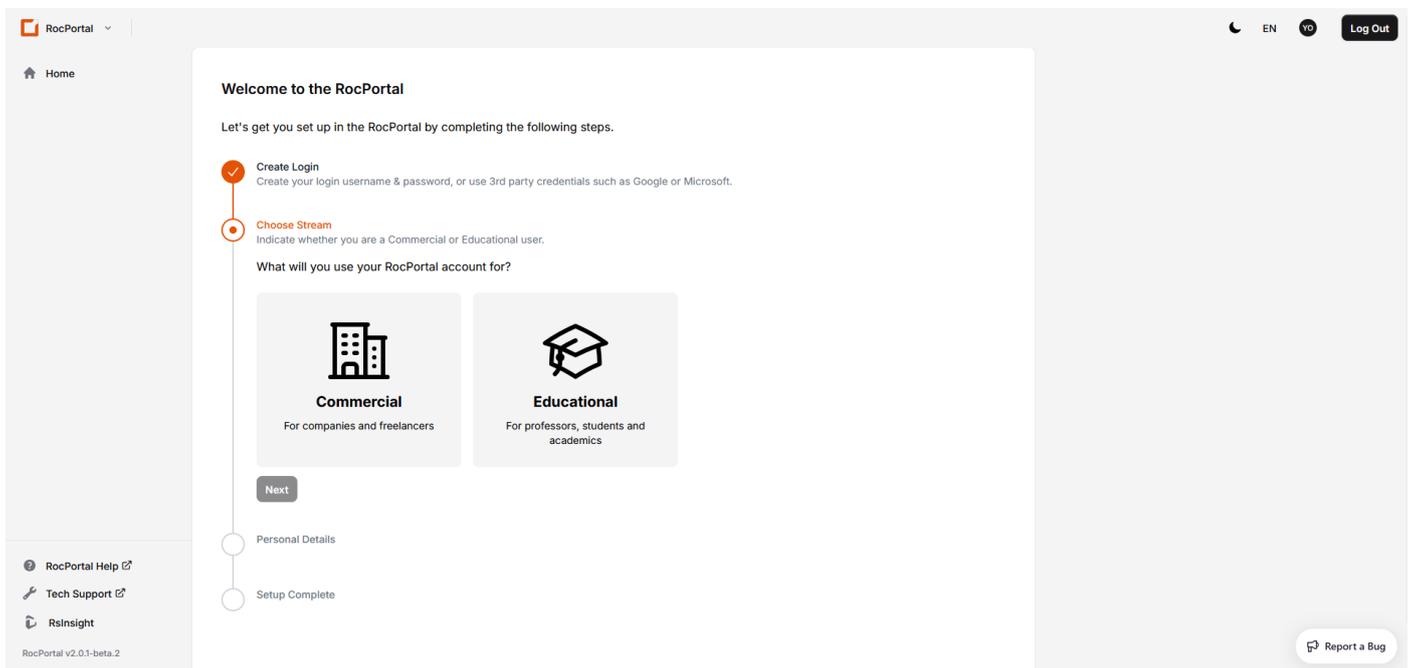
2. Open the verification email and click the verification link.

Note: Please whitelist no-reply@rocscience.com to prevent the email from being filtered as spam.

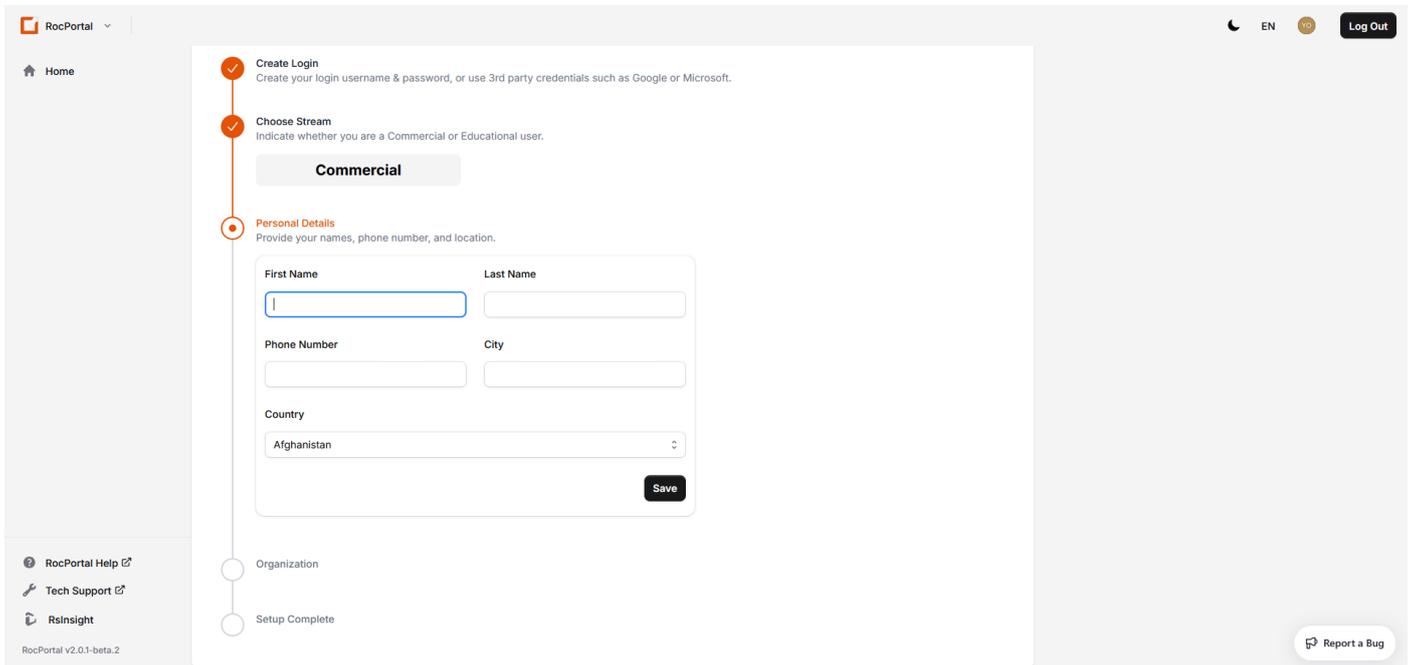


3. Complete your account creation by filling in the following:

- Choose your Stream: Commercial or Educational.

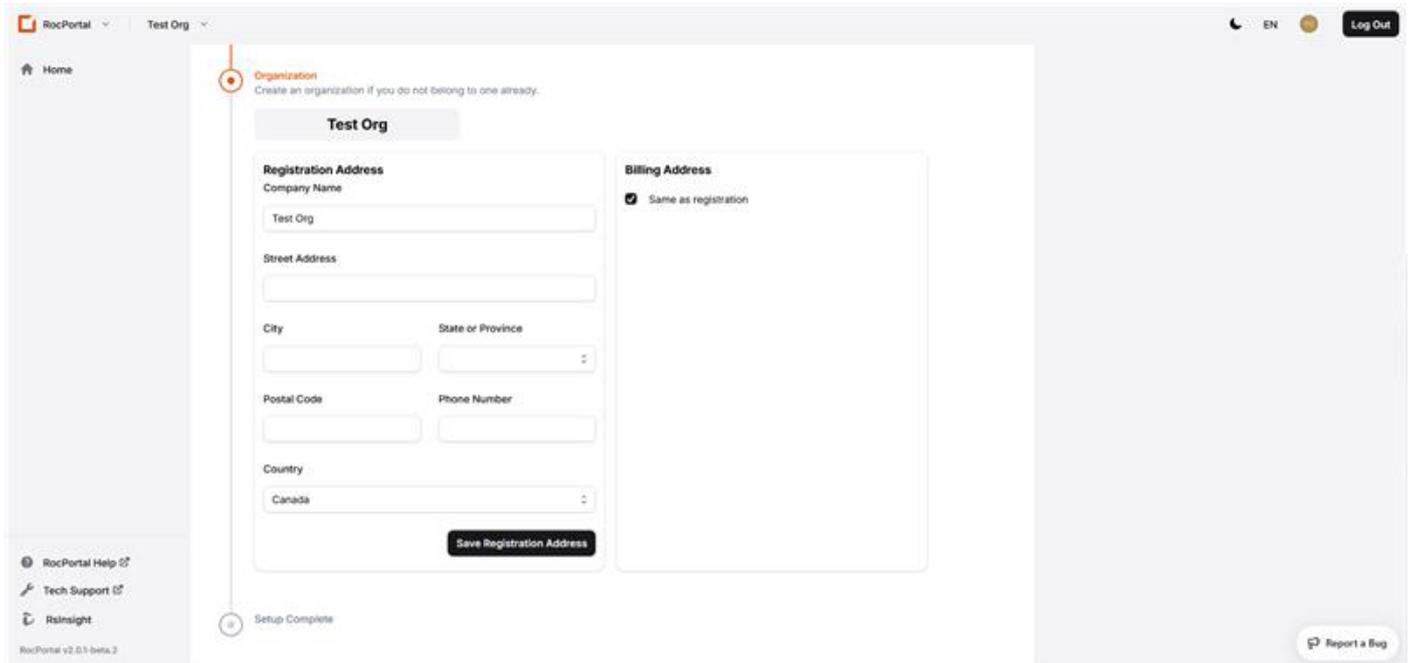


– Enter your Personal Details.



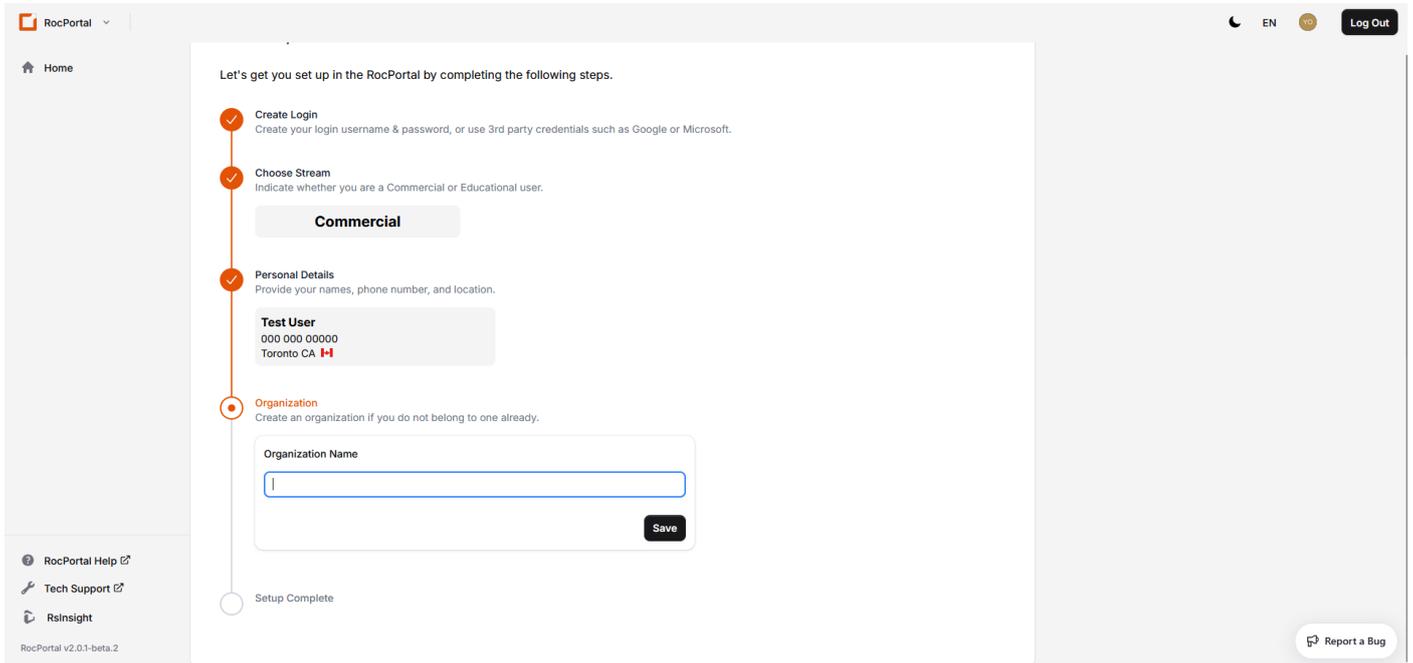
The screenshot shows the 'Personal Details' step of the registration process. The interface includes a sidebar with 'RocPortal' and 'Home' links, and a top navigation bar with 'EN' and 'Log Out' options. The main content area features a progress indicator with three steps: 'Create Login' (checked), 'Choose Stream' (checked), and 'Personal Details' (active). Below the progress indicator, the 'Personal Details' section is titled 'Provide your names, phone number, and location.' It contains a form with the following fields: 'First Name' (text input), 'Last Name' (text input), 'Phone Number' (text input), 'City' (text input), and 'Country' (dropdown menu with 'Afghanistan' selected). A 'Save' button is located at the bottom right of the form. A 'Report a Bug' button is visible in the bottom right corner of the page.

– Enter your Organizational Registration details.

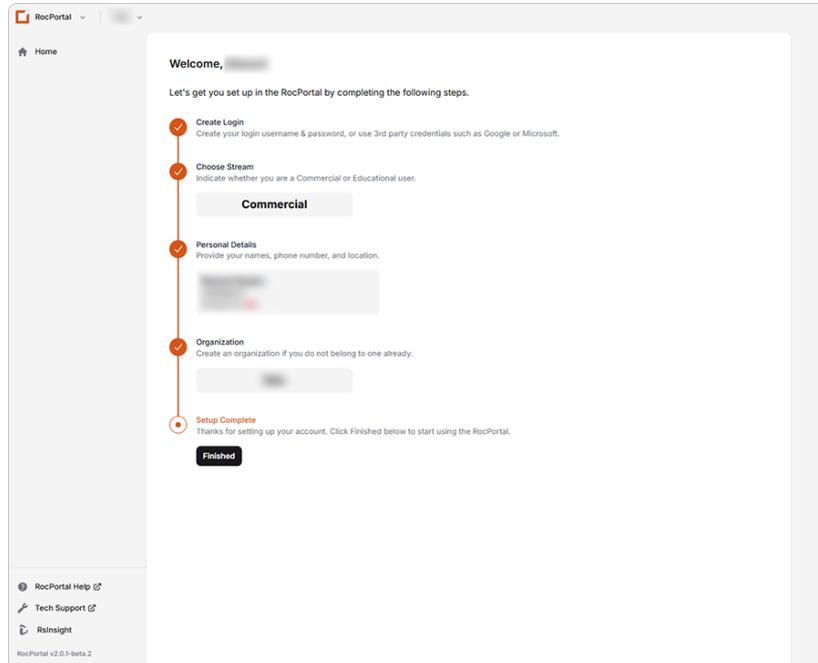


The screenshot shows the 'Organization' step of the registration process. The interface includes a sidebar with 'RocPortal' and 'Home' links, and a top navigation bar with 'EN' and 'Log Out' options. The main content area features a progress indicator with three steps: 'Create Login' (checked), 'Choose Stream' (checked), and 'Organization' (active). Below the progress indicator, the 'Organization' section is titled 'Create an organization if you do not belong to one already.' It contains a form with the following fields: 'Company Name' (text input with 'Test Org' entered), 'Street Address' (text input), 'City' (text input), 'State or Province' (dropdown menu), 'Postal Code' (text input), 'Phone Number' (text input), and 'Country' (dropdown menu with 'Canada' selected). A 'Save Registration Address' button is located at the bottom of the form. A 'Report a Bug' button is visible in the bottom right corner of the page.

– Enter your Organization Name.



4. Click Finished when all of the registration details are completed.

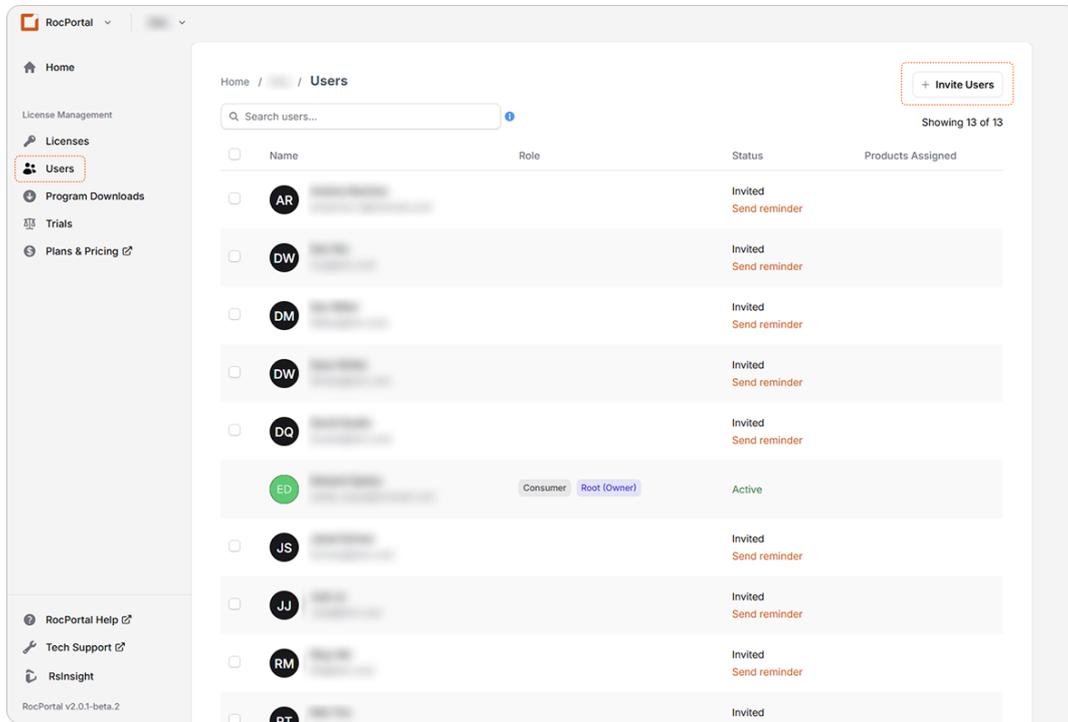


You are now the Root (Owner) of your Organization and can invite users and assign roles (Consumer, Admin, and Billing).

Note: We highly recommend assigning another user as an Admin in case the Root (Owner) becomes unavailable. This is important for situations where changes need to be made on the RocPortal account, another user needs to be assigned or a license needs to be renewed, but the Root (Owner) is unavailable (such as being on vacation or having left the company).

Invite Users to join your Organization

1. From the Home screen or left panel, select the Users tab and click + Invite Users.



2. Enter the user's details and click Send Invite.

Note: Before users accept the invitation, the Root (Owner) should determine their roles. Invited users are automatically assigned the Consumer role. The Root (Owner) should follow the steps below to change their roles.

Invite by email Import

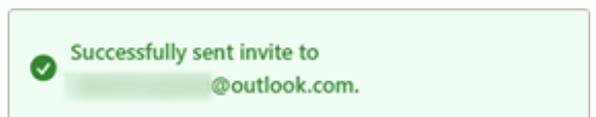
Email Address

First Name

Last Name

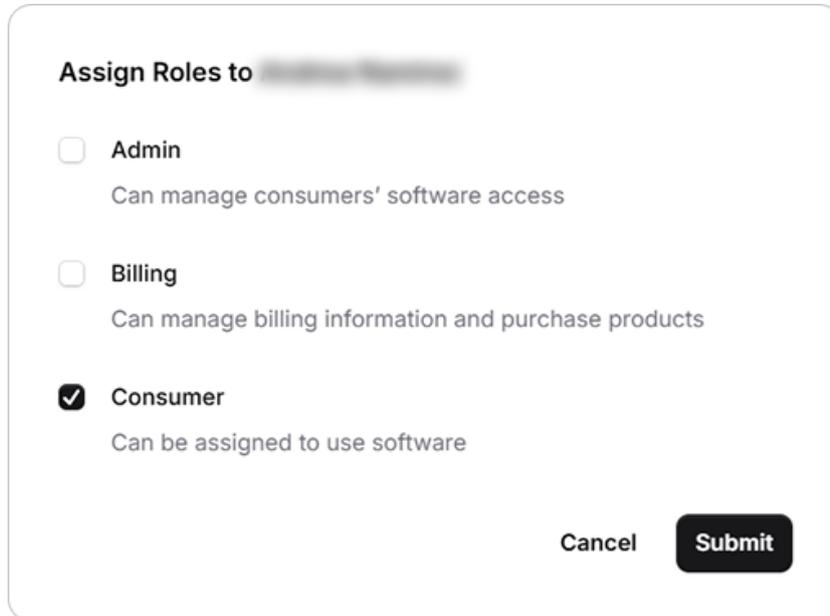
Add New

Cancel **Send Invite**



3. From the Home screen or left panel, select the Users tab.

4. Choose a user and click Change Roles.



The dialog box is titled "Assign Roles to [redacted]". It contains three role options, each with a checkbox and a description:

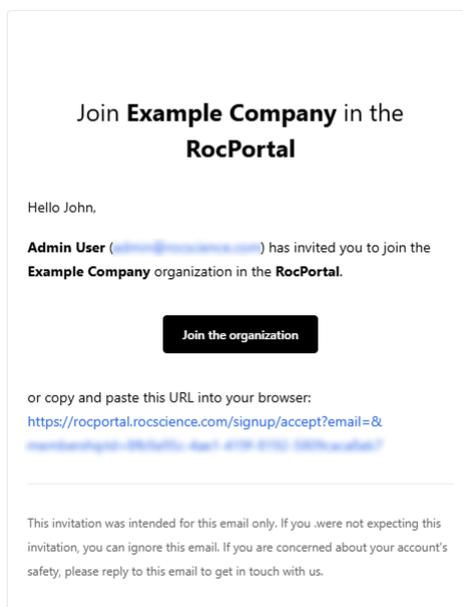
- Admin**
Can manage consumers' software access
- Billing**
Can manage billing information and purchase products
- Consumer**
Can be assigned to use software

At the bottom right, there are two buttons: "Cancel" and "Submit".

5. Tick the checkbox(es) for the role(s) you want to assign to the user and click Submit.

Once you have invited a user to join your organization, the user will need to complete the following steps:

1. Open the email invitation to join the Organization.



2. Click **Join the organization**. If the user does not have a RocPortal account, they will be prompted to sign up for a RocPortal account by entering new account login credentials. A verification email will be sent to the email address entered.
3. Open the verification email and follow the verification link back to RocPortal.
4. Once the email is verified, enter the RocPortal, where they can accept the invitation to the organization.



Once the above steps are complete, you will see the user status change to "Active" in your RocPortal account. As the Owner, you can now assign them access to licenses.

Assign User Devices to Licenses

The Owner or Admin roles have access to the User Management section on your account. There are two ways to assign a user access to a license.

Users > Select the user

1. In the list of Users, click the user's name.
2. Locate the desired product license from the list and click + Assign.
3. If multiple products need to be assigned, select them using the checkboxes on the left and click the + Assign Selected button that appears.
4. A confirmation modal will pop up. Confirm this action by again clicking Assign.

Licenses > Manage

1. Click Manage on the product you would like to assign.
2. Click Assign Users.
3. Tick the box next to the user(s) you would like to assign.
4. Click Assign.

