

The Complete Guide to Transition to Cloud-Hosted Licenses & the RocPortal

Below, you'll find a step-by-step guide on how to:

- Setup your RocPortal Account
- Create your Organization
- Invite Users to your Organization
- Assign User Devices to Licenses
- Access a License for the first time

Creating a RocPortal Account & Organization

An individual who intends to manage licenses (purchasing, renewing, managing access) should create their RocPortal account and subsequently create the Organization following the steps below:

1. [Sign up for a RocPortal account](#) and create your login credentials.
2. You will receive an email asking you to verify your email address. Click on the link in the email.
3. Complete your account creation by filling in your personal details.
4. Create the Organization for your company by filling in the required information.

You are now the Root (owner) of your created Organization. You can now invite users and assign them roles such as Consumer (actual user of the license) or Administrator.

Invite Users to join your Organization

From the *Home* or *User Management > By User* tab, click "Invite Users." Once you have invited a user to join your organization, these are the steps that they need to complete:

1. Open the email prompting them to join your organization.
2. Click on "Accept invitation"
3. Sign up for a RocPortal account by creating their account login credentials (email address and password).
4. They will receive a verification email.
5. Click the verification link in the email.

Once steps 1-5 are complete, you will see the user status change to "Active: in your RocPortal account. Once a user's status is "Active", you can assign them access to licenses.

How to Assign User Devices to Licenses

Anyone with an Admin permission will have access to the *User Management* section. From here, there are two ways to assign a user to access a license.

User Management > By User

1. Click the user.
2. From the *Not Assigned* section, click "Assign."
3. A confirmation modal will pop up. Confirm this action by again clicking "Assign."

User Management > By Product

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

Refer to [this video](#) for more details on assigning users to licenses.

Note: Personal Leases - Once a User Device is assigned, it is locked to the license.

Accessing a License for the First Time

Before accessing a license for the first time, the Identity String associated with your RocPortal account must be applied to the ACC licensing server. This will link your RocPortal account to the device that you are currently using. **Ensure that the computer you want to access the software on is the computer you are using for the following steps.**

1. Download the program to your computer.
2. Install it.
3. Go to your RocPortal account. From the *My Account* page, click "Apply to ACC."
4. You can now run any software program that you are assigned to.

Note: You only need to click "Apply to ACC" once. After your ID has been activated on the ACC server, there is no further action required, unless you want to connect your RocPortal account to a different computer.

The Complete Guide to Transition to Cloud-Hosted Licenses & the RocPortal

If you receive a Page Not Found or 404 error after clicking on “Apply to ACC”, make sure you install the latest versions of the assigned Rocscience programs and then try again.

RocPortal Walkthrough Video

Get up to speed with the RocPortal through [this video](#), which explains each section and its functionality.