

# WORKSHARE PROFESSIONAL 9

## LICENSING FAQ



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## How are Workshare products licensed?

**From version 9 onwards**, Workshare Professional – which includes Compare, Protect and Connect – uses a new *authenticated licensing* model. It's different to how previous versions were licensed. For each product sold, we supply a *license* with the specified quantity of seats – normally valid for a term of 12 months. Each user of the product consumes one *seat*, which allows them to legally use that product for the 12 month term. Under the authenticated licensing model, a *seat* is tied to a user's credentials. Each user can have an installation of the product on up to three devices per seat.

## How is installation different compared to the previous method?

During installation, admins use a secure online admin space to set up the usernames for all their users. These usernames are set up with corporate email credentials. The authentication process instantly sends an email to each user with a click through to authenticate their username and select a password. Admins install Workshare Professional unlicensed.

## Are users burdened by constantly having to log in to Workshare?

No – it's a one-off process for users. During the *very first use* of any licensed Workshare product feature, the user is prompted to log in once per device to authenticate their installation online. The appropriate license key is silently downloaded and applied to the device.

## What is the process for admins to license Professional 9?

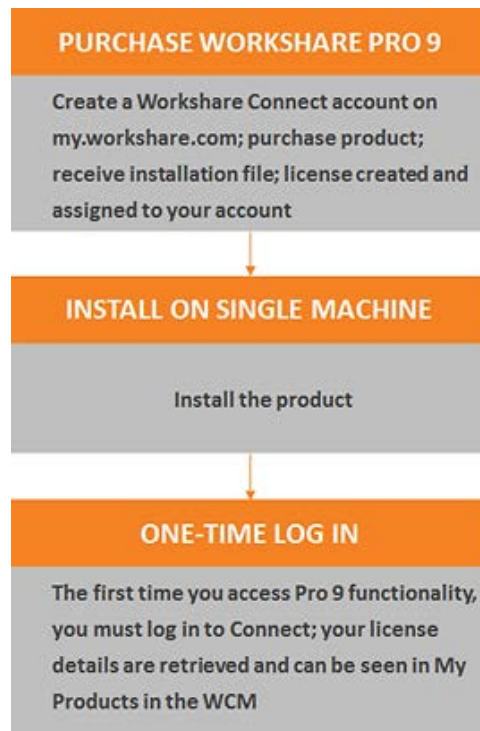
When a Workshare product is purchased, a license entitlement is created and assigned to the account, waiting to be picked up by each **user**. How this is done in your company depends on whether you are manually installing on a few computers only or rolling out across a network (see the answer to **What are the steps for a single install or network deployment?**).

## What constitutes a “user”?

Users are people in the account using one of the customer's licenses for Workshare Professional. All users will share the same domain name. The Professional software is linked to the user login. If a user leaves the company, their credentials will be automatically released and their license can be re-used.

## What are the steps for a single install or network deployment?

### Single Install



### Network Deployment



## How do I download the software?

To access the download file, log in to my.workshare.com, click your name and select **Download Center**.

## How do I add users when I've bought Professional or bought Connect separately?

When deploying Workshare Professional across a network, admins need to first add their users to their company's Workshare Connect account. Users need a Connect account so that they can log into Connect on first use of Professional in order to validate their entitlement to Workshare products and receive their Professional license.

Adding users to a Connect account is a simple process performed in the Connect Admin Console and admins may add users individually or up to 100 at one time using a CSV file. Adding a user invites that user to your Workshare Connect account and they receive an email asking them to validate their account and create a password for it. Only when the invited user validates their account are they considered a licensed user on the customer's account.

## How do I add users when I've bought Compare or Protect and didn't buy Connect?

If the installer does not have access to the Admin Console, for example, they have purchased only Compare, they need to add users direct to the backend licensing system. This way, the installer can create accounts for users without needing access to the **user management** features that are part of Professional. To be identified, first the installer needs to create a personal (free) account with Connect. Then, they follow a link to the backend system, log in with their Connect credentials and from there will be able to add the CSV file in exactly the same way. This is the link to follow once they've created their personal Connect account: <http://workshare.force.com/knowledgebase/CustomerUploads>

## What is the format of the CSV file?

Admins need to create a CSV file containing the user account information (up to 100 users). Ensure the file has the following mandatory headers: "email address" and "first name". They may also include the following headers: "last name", "job title" and "phone number".

## What does each user have to do?

The first time a user accesses Workshare functionality, for example, by clicking any option in the Workshare tab, they are prompted to log in to Workshare Connect in order to retrieve their license entitlements. They must enter their Workshare Connect credentials (email address and password) and click **Sign in**. This is a one-time requirement.

## Why are Workshare credentials linked to email addresses?

Email addresses are how the authenticated licensing model links the purchase, the install package and, ultimately, the user license to your Workshare Professional subscription. For purchasers and installers, make sure when you buy and register you give us your work email and check your spam folder. When adding users, make sure you use their work email.

## How do I manage licenses?

The license entitlements for individual user account are retrieved and shown in the **My Products** tab of the Workshare Configuration Manager (desktop application). It shows a user the list of Workshare products they are licensed for. Admins can log in to the Connect Admin Console (online) to see the list of licensed users (and devices) they see and the details of their subscription.

## Do things reset at renewal?

Authenticated licensing is a one-time process – assuming the customer continues to renew after the term of their original purchase, the license auto renews and never requires re-authentication.

## How does a customer renew a license?

When a term license is coming to an end, a reminder is displayed to all users when they access any Workshare functionality. Customers (through their sales manager or partner contact) can prevent this by renewing in good time. Once they have purchased the renewal license, the customer's entitlement details are updated in Connect. All users in the account will receive their entitlement renewal automatically – there is no need for users to log in to Connect.

## How do I upgrade a perpetual license?

To use Professional 9 with your perpetual license, you require an up-to-date support contract with Workshare. The authenticated license for Professional 9 is against your support entitlement to upgrade to the latest version, so as long as your support is current, licensing works in the same way as above.

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