Best Practices for the Transition to Named User

Noelle Ruiz, Go-To-Market Communications Specialist
Noelle Ruiz

Go-To-Market Communications Specialist

I help communicate subscription changes and new offerings to admins of Autodesk software.
Agenda

- What is changing and why?
- Recap of multi-user trade-in offer
- How to prepare for your trade-in
- 4 steps to transition after trade-in
What is changing?

Autodesk is launching new plans that are based on people.
And retiring plans based on serial numbers.
What are the benefits for IT and admins?

Make smarter decisions based on usage data

Increase productivity with dedicated & secure access for users, wherever they’re working

Reduce IT costs and complexity with user-based licenses instead of serial numbers
Three Plans to Choose From

- Subscriptions with single-user access become the **Standard** plan & continues to be enhanced
- New **Premium** plan available
- **Enterprise** Business Agreements continue to be top tier plan

### NEW PLANS TAILORED TO YOUR NEEDS

**AUTODESK PLANS**

Our new plans for named users provide a range of administrative, support, and reporting capabilities for organizations of every size.

<table>
<thead>
<tr>
<th>#</th>
<th>Features + Expand all</th>
<th>Standard</th>
<th>Premium</th>
<th>Enterprise</th>
</tr>
</thead>
</table>
| 1 | For individuals and smaller teams | - Product usage reporting  
- 2-step verification  
- 8x5 live support  
Benefits included with all product subscriptions | BUY | CONTACT US | |
| 2 | For medium and large teams of 50 or more | - Product usage reporting with user details  
- Single sign-on (SSO)  
- 24x7 live support  
Benefits available at an additional cost | | |
| 3 | For extra-large teams | - Connect data to third-party tools via API access  
- Automated user assignments  
- Customer Success Manager  
Benefits available at an additional cost | | |
How do I get to named user?
(MULTI-USER TRADE IN)

Network Maintenance and Multi-User Subscription

At your first renewal only, after August 7, 2020

Trade in 1 license for 2 subscriptions (for one named user each)
How to prepare for trade-in

Make sure you are in your 90-day renewal window

- Confirm your users can connect to the internet every 30 days

- Confirm you are on a product eligible for trade in

- Upgrade to a supported version of your product (current or up to 5 back)
Within the first 30 days starting from the day your old subscription expires, you will need to complete these steps.

After trade-in, you will receive an onboarding email the day your new subscription starts.

**Onboarding email after you trade-in**

Dear John Smith,

Your new subscription plan on Contract #: 110001234321 is now available.

**Follow these simple steps (via the link below) to help your users get started with their software:**

1. Add users in Autodesk Account
2. Assign users to your subscription
3. Update your license type to Named User subscription *(Please note that you have 30 days to make the switch before your network license expires)*
4. Inform your users about the new sign-in process

**GO TO AUTODESK ACCOUNT**
Transition to Named User: Onboarding

Onboarding and notification in Autodesk Account

When you first sign into Autodesk Account after the new subscription starts, you will see these reminders.

You can refer to the “days left” counter at the top of your Autodesk Account home and use the drop down to refer to the four steps. You can dismiss this screen when complete.

You can also see a notification in the Notification bell in Autodesk Account.
Transition to Named User: Onboarding

- ADD users
- ASSIGN users to your subscription
- SWITCH your network licenses to named user
- INFORM your users about the new sign in process
A case study with tvsdesign

Jessica Steel-Hardin
Head of IT, Technology and Operations

- Atlanta based architecture and interior design firm with over 50 years of experience.
- 150+ users using AutoCAD, 3Ds Max, and Revit daily
- Previously on a network maintenance plan
- Transitioned to named user and upgraded to Premium plan in less than 30 days

“Not everyone has the same type of internet (at home) that I have in our office…. So I’m trying to find ways for them to be more stable when they’re working. And the best way for that was to switch over to named user.”
Add Users to Autodesk Account

Add Users in Autodesk Account under User Management

Three options to invite users:

- Invite single
- Invite multiple
- NEW: Bulk import (upload a CSV file)

Users receive email notification to create their Autodesk Account

Step 1 | Add Users

Jessica Steel-Hardin
Head of IT, Technology and Operations

“We already had all of our users in our Account Admin Portal because we are also using BIM 360. This made the process easier. I selected about 30 users at a time to moved them to the new license.”
Step 2 | Assign Users

Assign Users to Subscriptions

Assign users to products in User management under the “By Product” view

Two options:
- **Assign** (select one or multiple from list)
- **Import to assign** (upload a CSV file to invite & assign users)

Users are notified via email of new products they can access
End user update their license for software installed on their desktop using the “Manage License” feature in product.

Users can select “Single-user” and switch to named user license for current product releases and up to 3 back.

Jessica Steel-Hardin
Head of IT, Technology and Operations

“IT was important for us to have our users be a part of the switch, so they understood there was an active change taking place. For this reason, we chose to have the users switch their network license to named user on their own.”
After few weeks, 90-95% of our users had completed the switch on their own and we did an automated task through the network for the remaining users who still hadn’t switched over.”

Jessica Steel-Hardin
Head of IT, Technology and Operations
**Inform Users About the New Sign In Process to Access Their Software**

Users will now sign in with Autodesk ID and password.

- Encourage users to set up 2-step verification.

Premium plan users with single sign-on (SSO) enabled sign in with company credentials.

Once SSO is enabled, new users will be automatically added to your user list.

For compliance and security, decommission license servers to ensure users cannot continue to access network licenses.

**Jessica Steel-Hardin**
Head of IT, Technology and Operations

"By day 30, we had switched over 100% of our licenses to named user. We also chose to upgrade to Premium at the same time, so the new sign-in process for our users would now be done though single sign-on."
Seat Usage Reporting on the Standard Plan

All admins can now view “Summary” and “By Product” usage reporting in Seat Usage and export this data to a CSV.

Under the “By Product” view, you can see an aggregate summary of how many users per day have used each product.

By clicking on a specific product, you can see details such as frequency of use. For collections, you can see overall collection usage and individual products within it.
How to Unmask User Information in Premium Plan
By default, personal data is masked. To see user information, you can enable personal data in settings.

Step 1: Click on the setting icon

Step 2: Check the Personal Data box

Now, user details such as usernames and email addresses will appear in the seat usage view.
Seat Usage Reporting on the Premium Plan

On the Premium plan, you also have “By user” reporting, which shows frequency of use by an individual user. You can then click on a user for user-specific details such as products used, and usage frequency overtime. If using a collection, you can see aggregate and product-level details.

“We with Premium, I get the reporting. So when there are deadlines, I can see how much time they are using the programs, to see how efficient they are working or how inefficient they are working… it’s a better way for me to see who needs more training.”

Jessica Steel-Hardin
Head of IT, Technology and Operations
Next Steps: Before you go

LEARN ABOUT THE OFFERS AND VIEW A CUSTOMER VIDEO
https://www.autodesk.com/campaigns/transition-to-named-user

REVIEW THE FOUR STEPS ON THE AUTODESK KNOWLEDGE NETWORK
www.Autodesk.com/foursteps

ASK QUESTIONS ON THE CUSTOMER FORUM
https://forums.autodesk.com/t5/subscription-changes/bd-p/6073