Administrator's Guide for Subscription Entitlement Service

Getting Started

Bentley®
Advancing Infrastructure

Key steps for administrators

1. Ensure all active Bentley application users are registered.

   - If your users have not registered, please follow the registration and CONNECTION Client installation steps here: **Bentley User Registration**
   - To view your registration progress the Earned Value Discount Report is available on the Product Usage Report tile > Select button in the **Subscription Services Portal**.
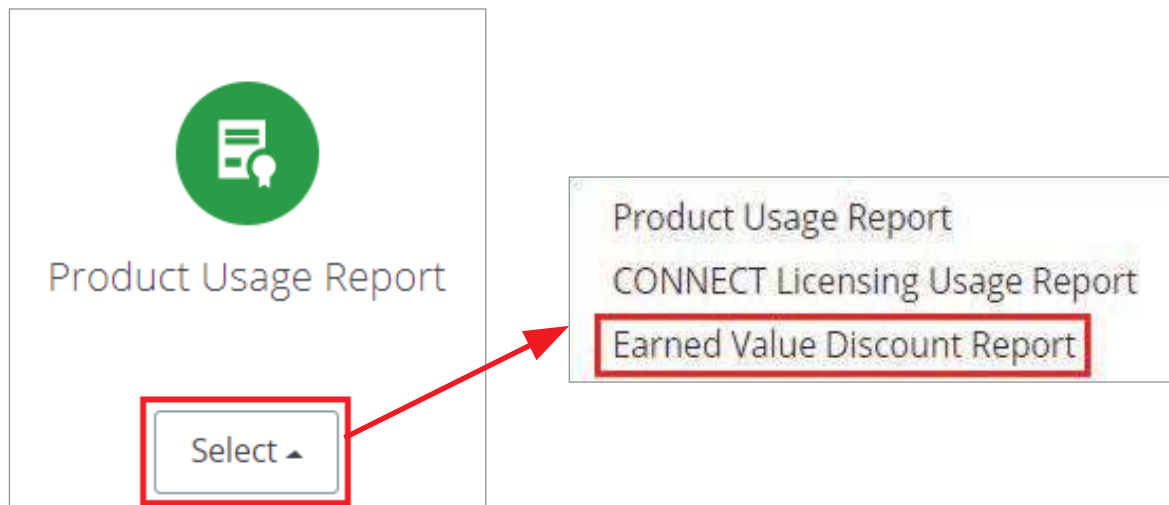
2. In order to access the Entitlement Management Service, you must be an Administrator or Co-Administrator.

3. Configure the 'Entitlement Management' Service (optional). For instructions on this Service, see below. Note that users will be able to utilize applications enabled with the Subscription Entitlement Service with the default settings.

4. Have your users adopt Subscription Entitlement Service enabled applications.

5. Notify the users that you have enabled Subscription Entitlement Service (optional). Here are some points you may wish to discuss:

   a. Product activation will now occur via user sign in to the CONNECTION Client.
   b. A 7-day offline period is permitted after you've signed in to the CONNECTION Client at least once.
   c. Users will receive an alert (if enabled) that they have crossed the alert threshold when they are about to exceed the threshold you set. This is only applicable for application versions enabled by the Subscription Entitlement Service. Any applications utilizing a SELECTserver activation key will not be counted for the notification threshold, nor will those users receive notifications. Regardless of licensing, usage of products will continue to be logged and pooled and may be subject to term licensing.

d. Usage is NOT restricted. Users will still be able to access Bentley applications if they continue to use products after receiving the alert.

Please see our Subscription Entitlement Service FAQ if you have any questions. For additional issues please file a Service Request or post to Communities.
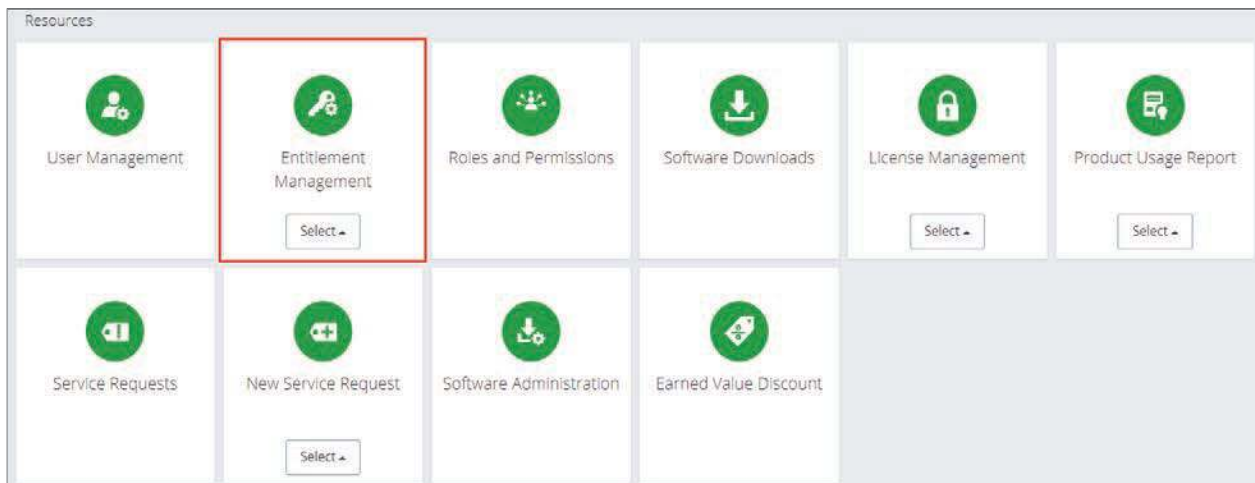
Entitlement Management Configuration

The Entitlement Management Service, located on the Subscription Services Portal, allows an Administrator to manage threshold alert notifications, and entitlement assignments for their Organization's applications.

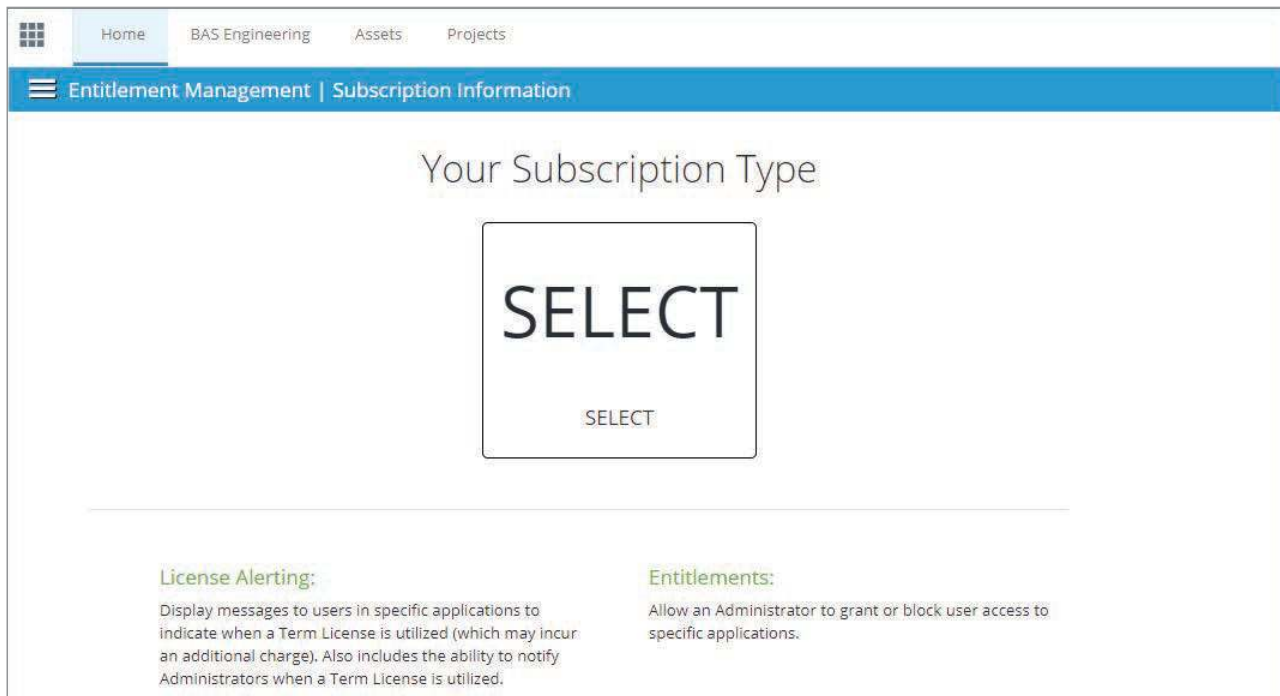## To access the Entitlement Management Service

- Navigate to the Subscription Services Portal via CONNECT Center: **https://connect.bentley.com/Enterprise**
- Select the icon with your account name.
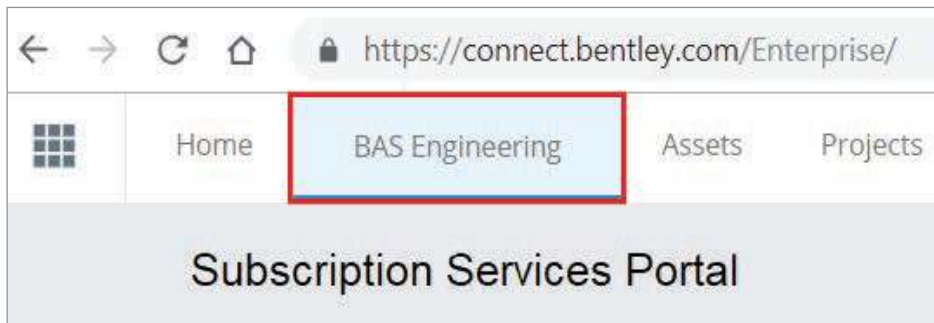
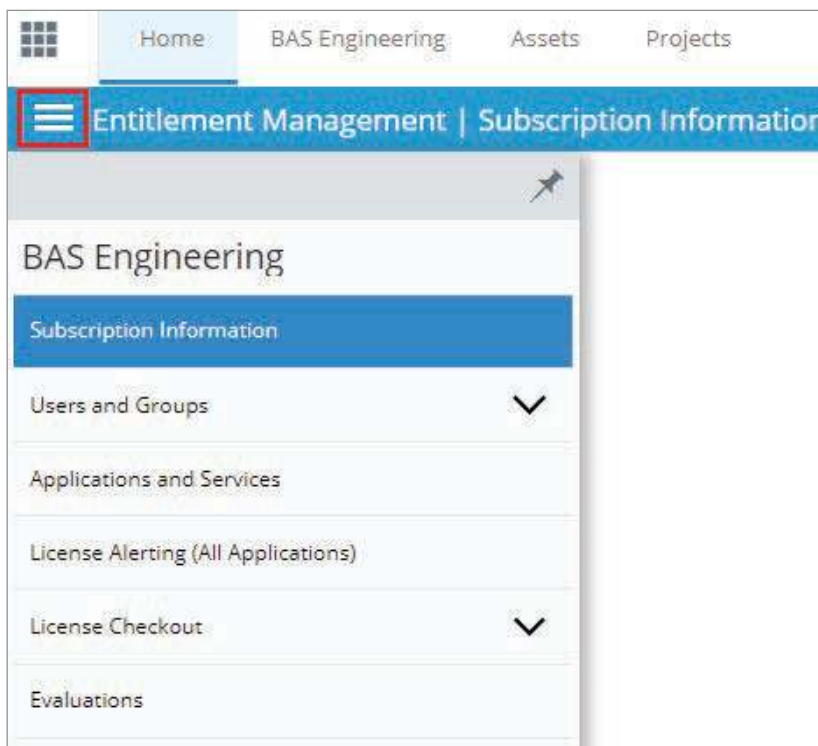- Select the 'Entitlement Management' Service tile.

The Home screen displays basic subscription information pertaining to your account.
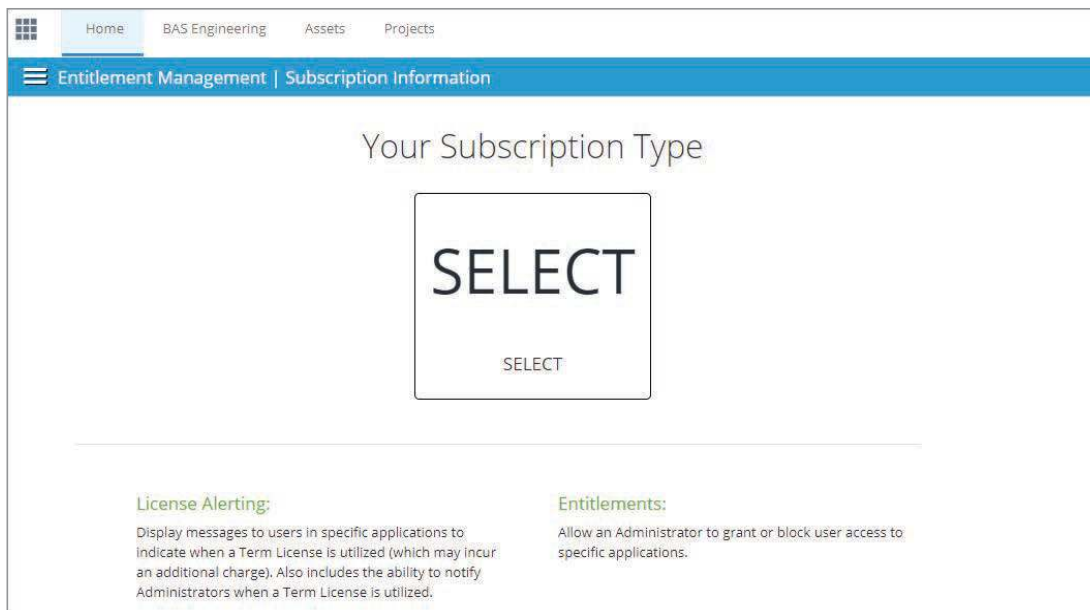

Entitlement Management - Options

The functions of this Service that are currently accessible via the Entitlement Management drop-down menu. **Note:** Functions not yet available are grayed out.

1. Subscription Information

This screen displays the basic subscription information pertaining to your account as previously displayed on the Home screen.


2. Users and Groups

The Users and Groups pages shows you a list of your Bentley application users. They can be managed via User Management, which is accessed by the 'User Management' button on the Subscription Services Portal. Entitlements may be added or removed for specific users by clicking on the user name. This can also be achieved in the next part under groups by adding "or User Name" where it says "Select the Group Name…"
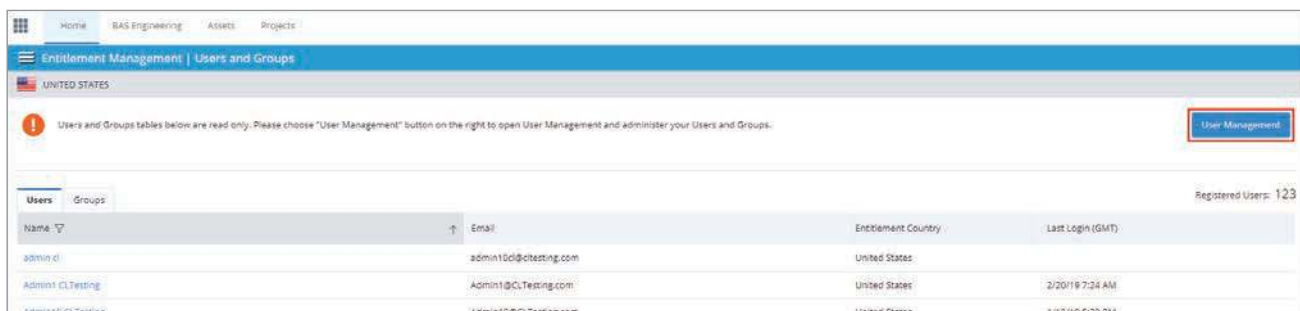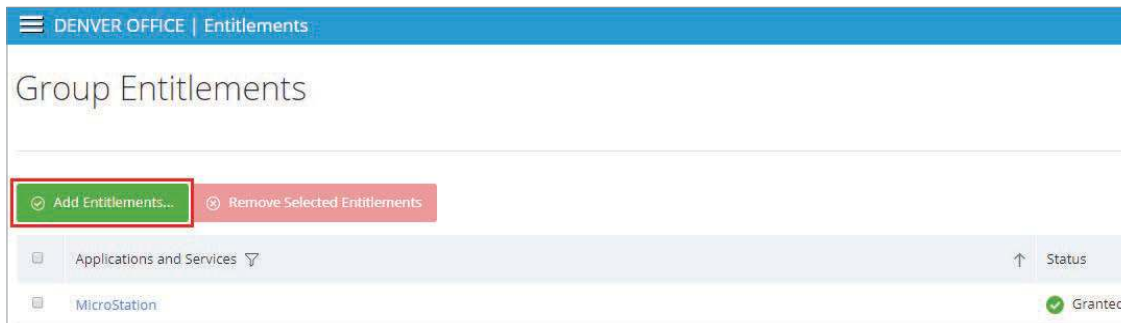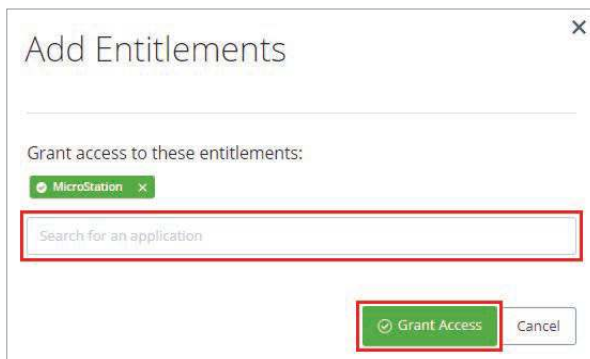

Groups

Entitlement groups created in User Management may be given access to an application(s). Access can also be removed.
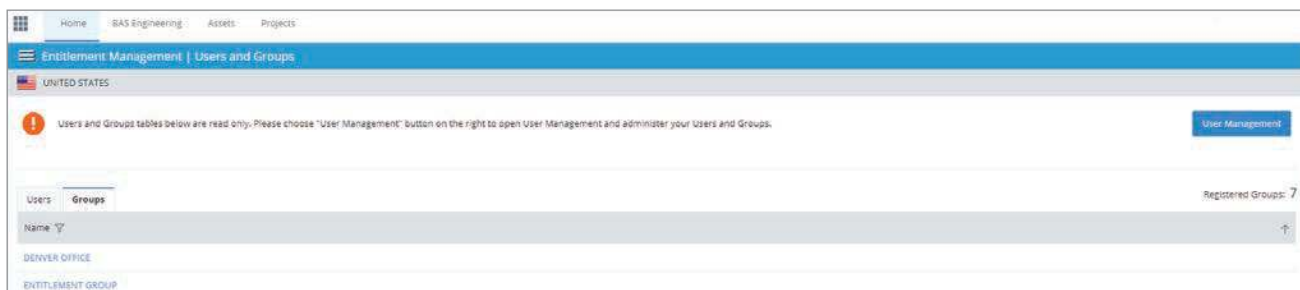
Select the Group name to see whether access is granted in the Group Entitlements dialog.

Click the green Add Entitlements button > search for the application and click Grant Access.


Entitlement Country - Administrator Setup

A user's entitlements are determined by their Organizational affiliation and country. When a user profile is created, users are assigned the following:

- Profile Country (where the user physically resides).
- Entitlement Country (which country's entitlements a user can access).
- A user's profile country is selected at the time of registration. Their entitlement country is automatically assigned based on the rules below.

Administrators can decide what Entitlements should be assigned when they register.
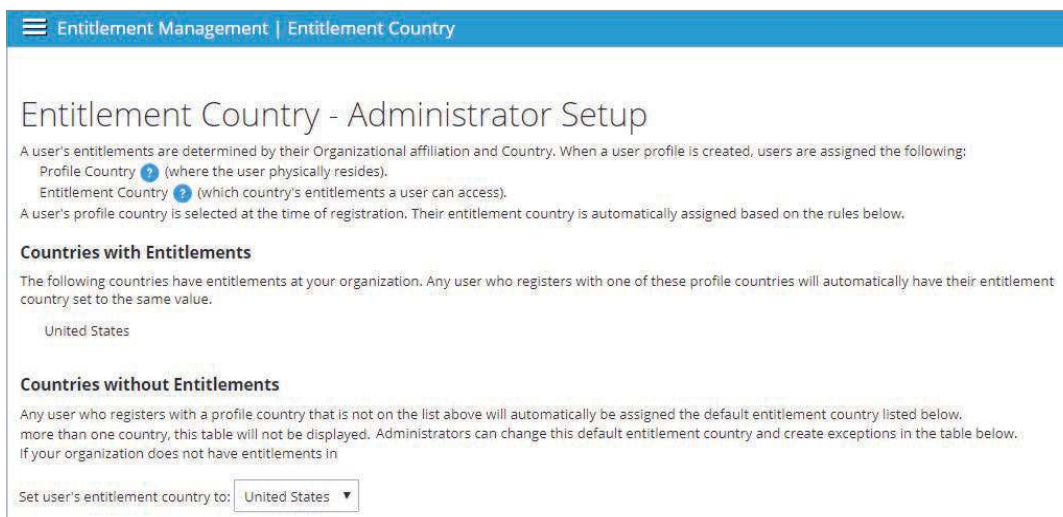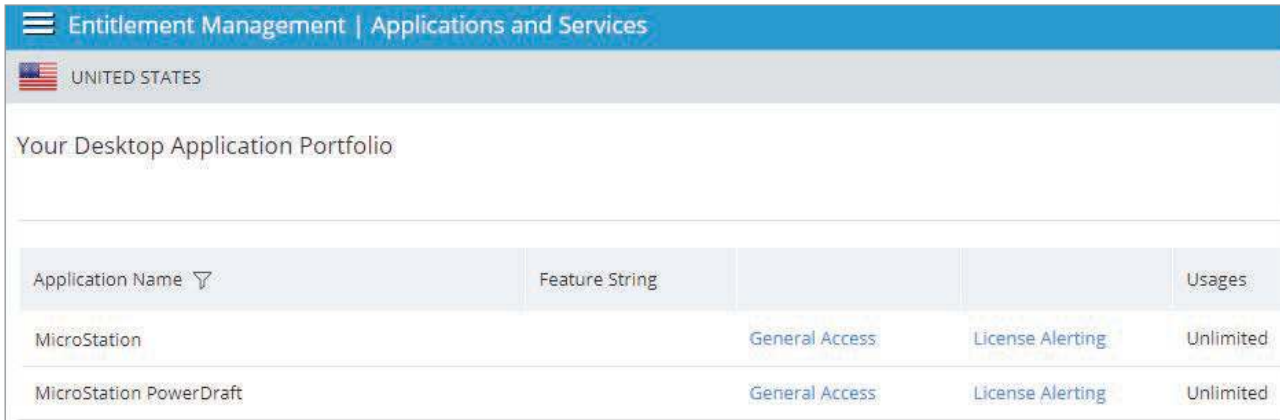

**Please note: Entitlement Management settings only apply to applications that use Subscription Entitlement Service and are not applicable to applications that are used with SELECTserver activation keys.

3. Applications and Services

Select 'Applications and Services' to display all of the applications licenses available within your Organization.

General Access – Allows you to set exceptions for what users have the product entitlement.
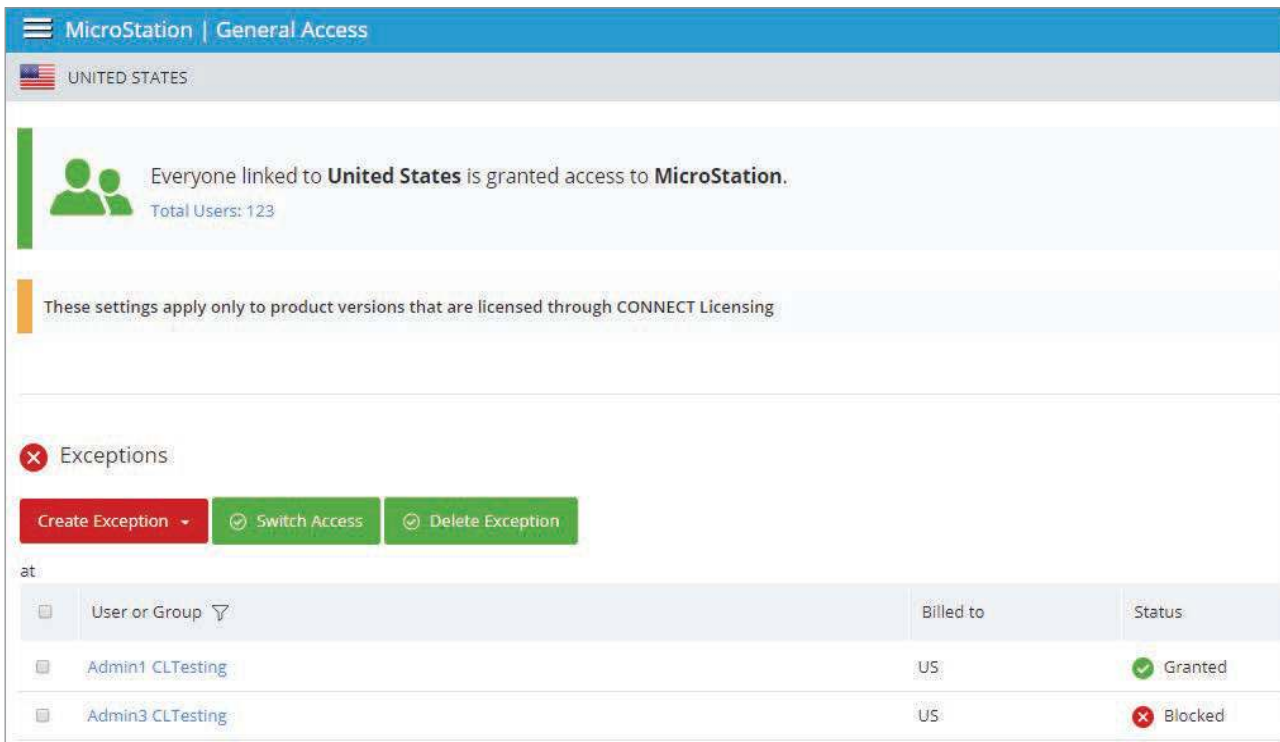
- License Alerting – Allows you to enable alerts for product usage.

Entitlement Management	Applications and Services				
UNITED STATES					
Your Desktop Application Portfolio					
Application Name ▽	Feature String				Usages
MicroStation		General Access	License Alerting		Unlimited
MicroStation PowerDraft		General Access	License Alerting		Unlimited

General Access is defined here:

MicroStation	General Access
UNITED STATES
Everyone linked to **United States** is granted access to **MicroStation**. Total Users: 123
These settings apply only to product versions that are licensed through CONNECT Licensing

❌ Exceptions

Create Exception ▾	⊘ Switch Access	⊘ Delete Exception

at

	User or Group ▽	Billed to	Status
☐	Admin1 CLTesting	US	✅ Granted
☐	Admin3 CLTesting	US	❌ Blocked

Select 'License Alerting' to configure the Licensing Alerts and Notifications for Administrators and Users.

- Enable Alerts for this application – If ON, will send alerts for this application.

Please Note: *License Alerting* applies to the threshold pop-up alert displayed to users while *Notifications* apply to the messaging sent to Administrators and Co-Administrators.
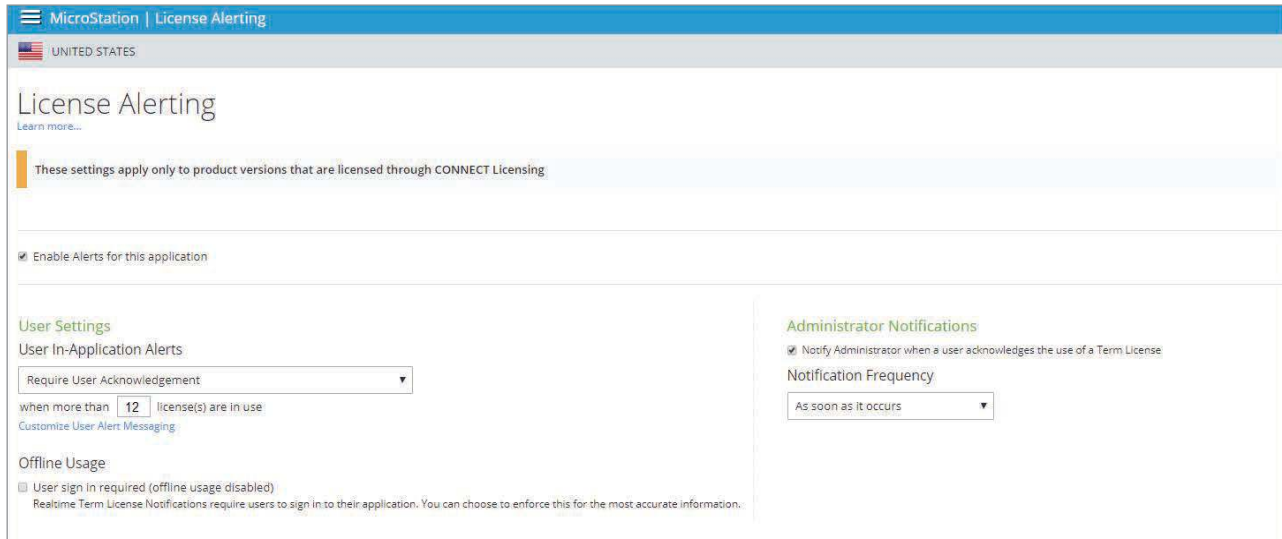
User Settings:

Select if the user is required to acknowledge the alert. No Restrictions allows the user to continue without acknowledging the alert.
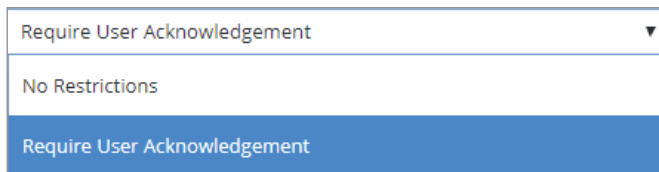

Then select the license threshold for when the alert will occur. You should set a threshold that reflects your company policy. If you wish to reduce the risk that a Term License is issued for this product, you should set the threshold to be at or below the number of licenses held for this product. Otherwise you can set it to the number of licenses (perpetual + term) that you wish to allow.


Please Note: There are situations that may prevent the alert from displaying. Some of these situations are described in the Subscription Entitlement Service FAQ. Organizations should be aware that regardless of the alerting settings, it is still the responsibility of the Organization to fulfill the obligations of their license agreement.

Optionally, you can customize the message that is displayed at the time of the alert.
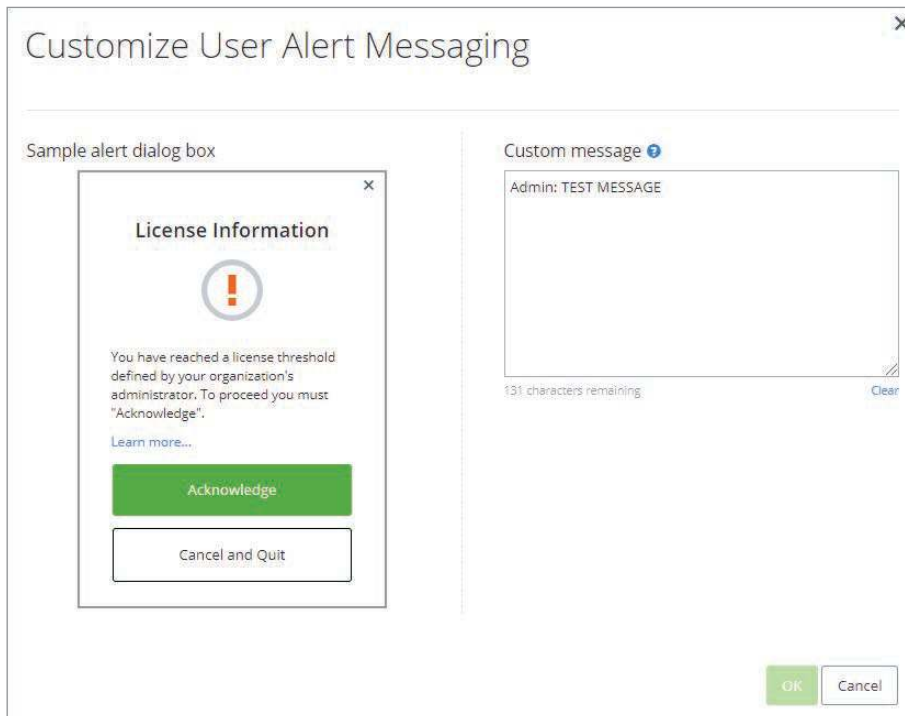

Finally, you can decide if offline usage is enabled. If set to ON, the user must be online and signed in to the application in order to be able to use it. If this is set to OFF, users will be able to continue to use the product in the event that they have no network connection when they start the application or during their session of application usage.
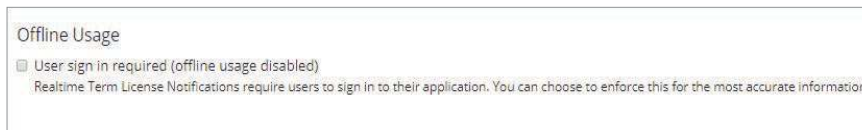
Administrator Settings

This allows the Administrator to receive notifications for any usage that occurs past the limit they designated.
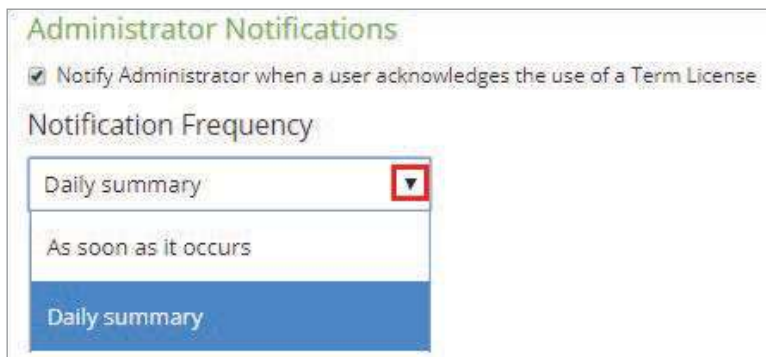
Please Note: Click "Save" to apply changes or they will be lost.

4. License Alerting (All Applications)

The instructions outlined above in Step 3 allow an Administrator to apply notification options to a specific application. To apply the same notification rules to all your Bentley applications, use the 'License Alerting (All Applications)' option.

Toggle on 'Enable Alerting and Notifications (all applications)' to receive a notification when a desktop application will exceed the usage limit set.

Set the appropriate notification levels.

If you need to change the values, you may do so under 'Exceptions'.

5. License Checkout

The Administrator can use this page to view current and past license checkouts, as well to check out a new license.

To view the application checked out per license, expand the down arrow after each user.

ID	Product	Feature String	Version	Checked Out On
Glen Frand aou163	1 License		Valid: 4/30/2020	•••
1038	MicroStation PowerDraft		10.12.0.42	5/1/2019

Select 'New License Checkout' and enter the defined options for a new license.

Subscription Entitlement Service Administration FAQ

Please see the following frequently asked questions.

1. If I have the Subscription Entitlement Service enabled for a Bentley application loaded and I install a newer product version, is the Subscription Entitlement Service automatically enabled?

Yes, all newly released Bentley applications will be Subscription Entitlement Service enabled.

2. Do I need any special roles?

You'll need an Administrator or Co-administrator role assigned to access Entitlement Management so that they can set the appropriate notification and access settings. End users do not need any special role assigned.

3. Is there an offline mode?

Yes. The Administrator can choose to enforce sign in, thus disabling offline usage.

4. Can users still check out a license?

Yes. License checkout still functions. This can be done by the Administrator via the Entitlement Management Service or by the user in the Bentley Licensing Tool.

5. Does the Entitlement Management Service restrict usage?

No. Users can still use more applications than they have licenses, however they can enable a notification letting users know when they may be about to exceed a certain number of seats set by the Administrator in Entitlement Management.

6. Can I restrict a user from gaining access to a specific application?

Yes. The Administrator can add or remove entitlements for single or multiple applications per user.

7. How do I know I am about to exceed the threshold set by an administrator?

A dialog box will display a warning alert to the user when they are about to exceed a limit set by the Administrator. A custom message can be created by the Administrator to provide the user with instructions on what to do when that notification appears.

8. What do I do after I get the usage alert?

The user may either end the application session or continue to use the application. The Administrator has the ability to customize this alert to reflect your Organization's policy. If the notification option is enabled in the Entitlement Management Service, that allows the user to continue to use the application, the Administrator will be notified if the user chooses to do so. (In this case it may result in a **term license** being issued if that usage is incremental to the number of licenses covered under SELECT).

9. If I do not get a license notification is my Organization still responsible for application usage?

Subscribers continue to hold the responsibility to manage their licenses within the terms of the SELECT Agreement. The license alert notifications assist with license management, but is not meant to supplement the responsibility of the account to monitor their usage.

10. What might cause notifications or alerts not to occur?

Some reasons this might occur (i.e. not an exhaustive list):

- Users may be working on a product not configured for notifications properly.
- The threshold may not be set according to the available licenses.
- Users may become disconnected from the network while they are using the product.
- A network delay/outage may prevent the message from being presented to the user.
- Notifications may not be enabled by your administrator.
- User may be running a SELECTserver-based version of the product.

11. What port(s) need to be opened for the Subscription Entitlement Service?

Port 443

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