

## Quick Reference Guide

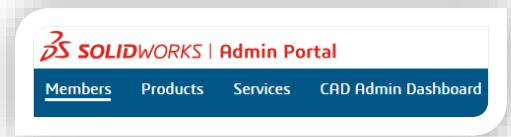
### ACCESSING THE SOLIDWORKS ADMIN PORTAL

- Log into MySolidworks ([www.my.solidworks.com](http://www.my.solidworks.com)) using your SOLIDWORKS ID
- Select the main menu (your name will appear as the main menu)
- Select Admin Portal



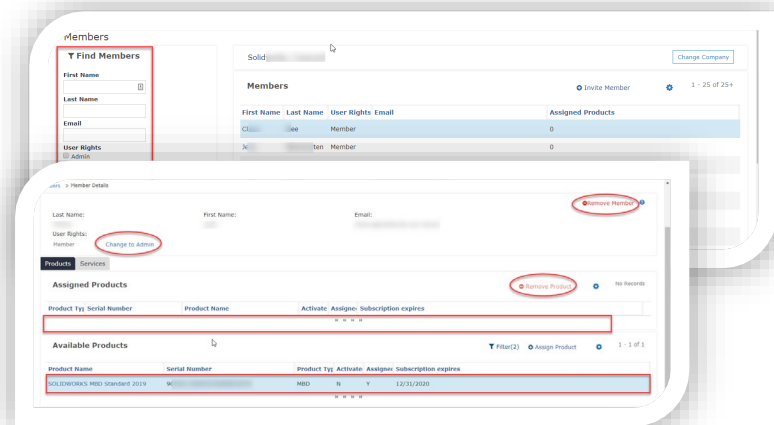
### ADMIN PORTAL VIEWS

- Navigate to the top menu to view the Admin Portal by Members, Products or Services
  - To view the CAD Admin Dashboard click the link next to Services



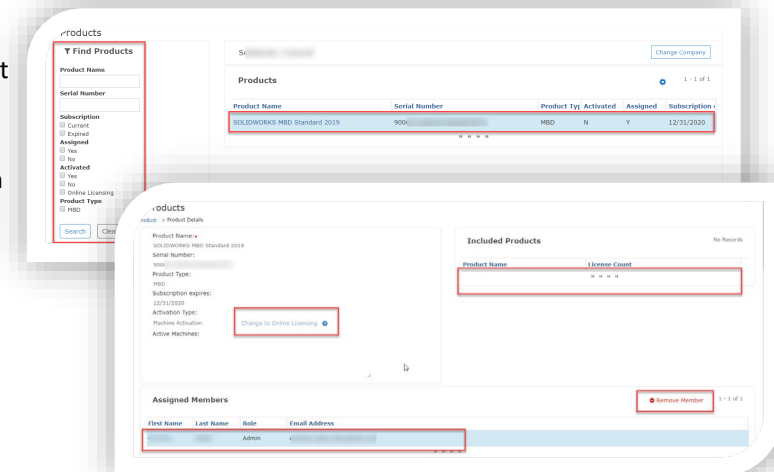
### MEMBERS

- Navigate to Members
- Search for Members using the search criteria on the left
  - Search by First/Last Name, Email, Access rights or Assignment
- Search results will appear in the Members section
- To view Member details, click on the first name in the search results
- The Members Details screen will show:
  - Member's name and email address
  - Assigned Products and Services
  - Available Products to assign to the user
  - Ability to promote or demote User Rights or remove Member



### PRODUCTS

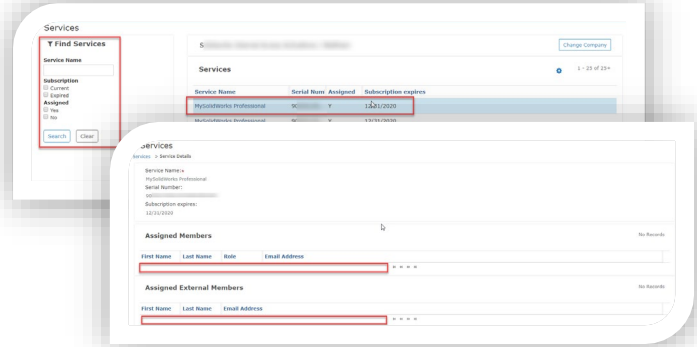
- Navigate to Products
- Search for Products using the search criteria on the left
  - Search by Product Name, Serial Number, Subscription Status, Assignment Status, Activation Status and Product Type
- Search results will appear in the Products section
- To view the Product details, click the Product Name in the search results
- The Product details screen will show:
  - Product Name, Serial Number, Type, Subscription Expiration Date, Activation Type
  - Ability to change to Online Activation or Machine Activation
  - Assigned Members
  - Ability to remove assigned Members
  - View of any add-on products



## Quick Reference Guide

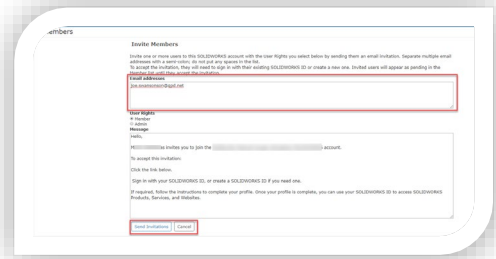
### SERVICES

- Navigate to Services
- Search for Services using the search criteria on the left
  - Search by Service Name, Subscription Status or Assignment
- Search results in the Services section
- To view Service details, click on their Service Name in the search results
- The Service details screen shows:
  - Service name, serial number and subscription expiration
  - View assigned Members



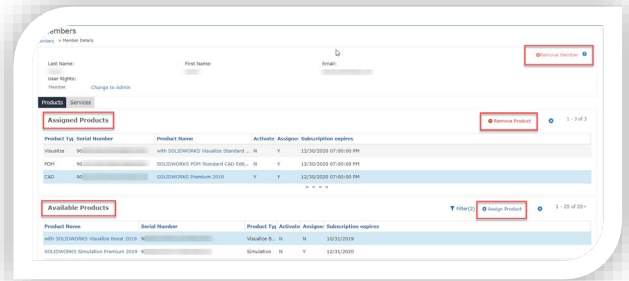
### INVITE MEMBERS

- Navigate to Members
- Click [+ Invite Member](#)
- Enter the email address(es) of the user(s) being invited
- Select the user rights level for the user(s) on the invitation
- Click the Send Invitations button



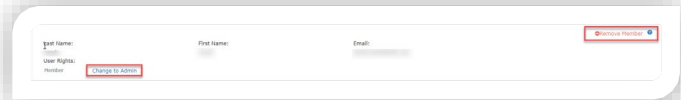
### ASSIGN OR REMOVE PRODUCTS

- Navigate to Members
- Search for the member who needs products assigned or removed
- Click the user's First Name in the search results
- To remove a product under Assigned Products, select the product
- Then click [Remove Product](#)
- Confirm removal
- To add product under Available Products, select the product
- Then click [Assign Product](#)
- Confirm assignment



### CHANGE OR REMOVE MEMBERS

- Navigate to Members
- Search for the member who needs products assigned or removed
- Click the user's First Name in the search results
- To change User Rights click Change to Admin or Change to Member
- To remove the Member, click Remove Member



### CHANGE COMPANY

- Navigate to Members, Products or Services
- Click the Change Company button
- Select the company to view

