SMARTDRAW ENTERPRISE SITE LICENSE:
Admin Controls Guide

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OVERVIEW

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SITE LICENSE ADMIN CONTROLS

AS THE SITE LICENSE ADMINISTRATOR YOU CAN:

- Manage which users can access your license
- Manage how users can interact with SmartDraw including setting storage and sharing preferences
- Put users in groups to manage permissions
- Manage common folders
- Configure SSO
- Retain control of user documents should they leave your organization
- Consolidate multiple individual paid and trial accounts into on account that you control

ISSUING ACCOUNTS

Administrators control access. There are two principal methods of control:

1. Restricting the email addresses that can access an online account to a specific set of domains that you control
2. Restricting the email addresses that can access an online account to a specific set of email addresses that you supply.

RESTRICTING ACCOUNT ACCESS

After end users have created accounts, the Administrator can switch access to restricted email addresses and therefore restrict any further access to the account, unless you specifically authorize it.

RETAIN DOCUMENT CONTROL

As an administrator you may change the email address and password required to access any account and its documents. You can transfer the account and its documents to the email address of another person in your organization.

CONSOLIDATE ACCOUNTS

Any existing trial account can be turned into a licensed account by entering your site license key into the field provided by the UI in the editor. All documents are now controlled by the site license account. To transfer an existing licensed account to the site license, the user must transfer the license to the new account by logging in to their account.

In all cases, users can only do this if they meet the access criteria you have specified.

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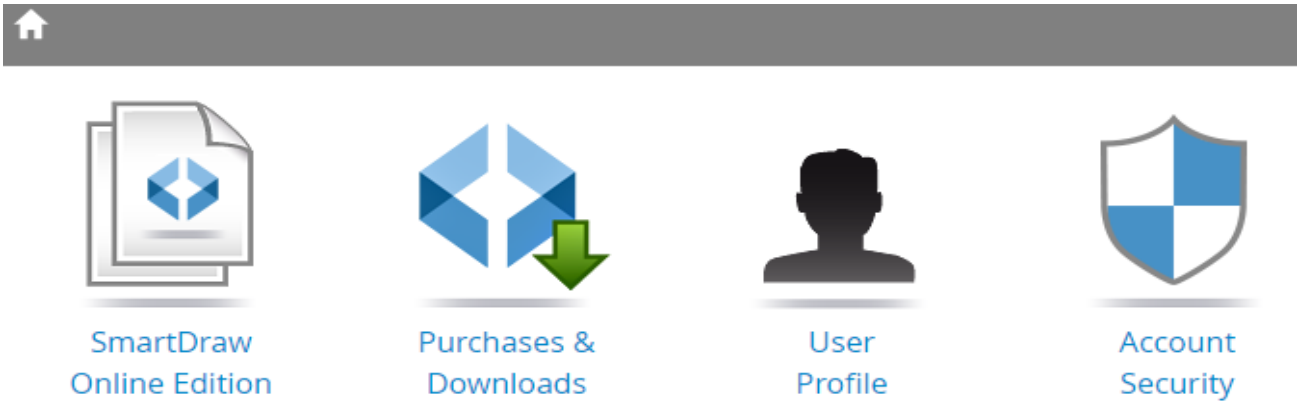
INITIAL SITE LICENSE SETUP WIZARD

GETTING STARTED

LOGIN TO YOUR ACCOUNT

Upon your initial purchase of a SmartDraw Site License, you have administrative control over how your team can access SmartDraw. Simply to login from www.smartdraw.com/myaccount/ to start managing your license.

Your account lets you manage all your purchases, your user profile, and account security.



LOGIN TO YOUR ACCOUNT

Step	Action
1	Login to your Account at www.smartdraw.com/myaccount/
2	Click **Purchases & Downloads.**
4	In the **License Key** column, navigate to your license and click **XXXXX-XXXXX [see license detail].**

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START THE INITIAL SITE LICENSE SETUP WIZARD

Begin your initial license setup. You're just a few clicks away from setting up your site license. You can always rerun

IDENTIFY A SITE LICENSE ADMINISTRATOR

Determine whether you or a colleague will be the Site License Administrator.

Note: You can change the site license administrator at any time in the future.

IDENTIFY A SITE LICENSE ADMINISTRATOR

Step	Action
1	In the **Step 1: License Admin** screen, determine whether you or a colleague will be the Site License Administrator.
2	4a) If you are the Administrator, click **Keep This Email and Continue**. OR 4b) If a colleague is the Administrator, click **Transfer Admin Rights to New Email**. Enter *the appropriate email address*. Click **Continue**. ***4b Note**: Transfer Admin Rights is a 2 Step process. First, the system will send an email invite to the New Administrator. Second, the New Administrator will be prompted to accept the invite.*

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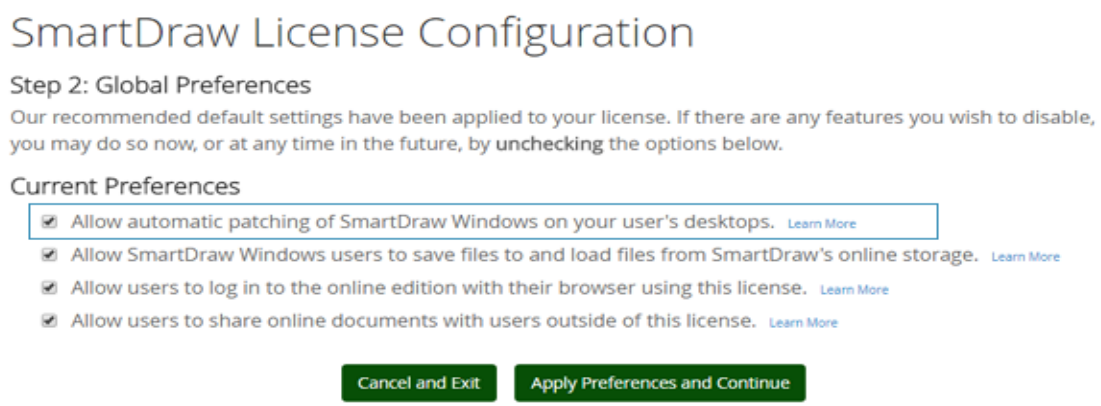
ENABLE OR DISABLE AUTO PATCHING FOR WINDOWS

From time to time SmartDraw Software may release an updated version of SmartDraw for Windows. By default these versions are automatically downloaded and installed to each desktop.

However, as an enterprise user you may choose to restrict this and roll out patches manually to ensure all users are kept at the same patch level.

Unchecking this box will prevent individual installations of SmartDraw for Windows from automatically patching themselves when an update becomes available.



ENABLE OR DISABLE AUTO PATCHING FOR WINDOWS

Step	Action
1	In the **Step 2: Global Preferences** screen, navigate to **Current Preferences**.
2	2a) To enable Auto Patching for Windows: Select **Allow automatic patching of SmartDraw Windows on your user's desktops**. OR 2b) To disable Auto Patching for Windows: De-Select **Allow automatic patching of SmartDraw Windows on your user's desktops**.

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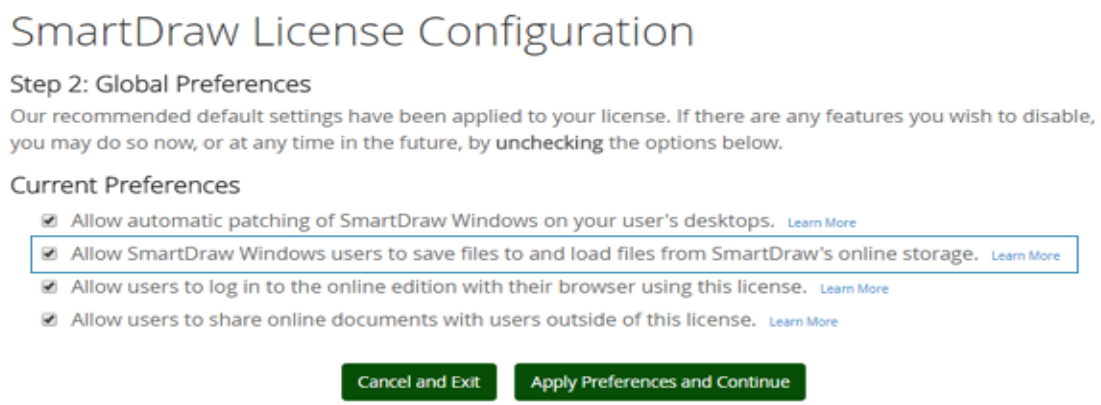
ENABLE OR DISABLE SMARTDRAW WINDOWS AND ONLINE INTEGRATION

SmartDraw for Windows has the ability to store and share files on an online account as well as edit them from any modern web browser. Even if this license does not have SmartDraw online edition on it your users may use the SmartDraw online edition trial or their own purchased license of SmartDraw to integrate with SmartDraw Windows on their desktop. By default, this integration is allowed so users can easily create and edit documents both online and offline with their browser or with the installed version of SmartDraw for Windows.

Unchecking this checkbox will prevent installed version of SmartDraw for Windows installed with this license key from loading files from or saving files online.



ENABLE OR DISABLE SMARTDRAW WINDOWS AND ONLINE INTEGRATION

Step	Action
1	In the **Step 2: Global Preferences** screen, navigate to **Current Preferences**.
2	2a) To enable SmartDraw Windows and Online Integration: Select **Allow SmartDraw Windows users to save files to and load files from SmartDraw's online storage**. OR 2b) To disable SmartDraw Windows and Online Integration: De-Select **Allow SmartDraw Windows users to save files to and load files from SmartDraw's online storage**.

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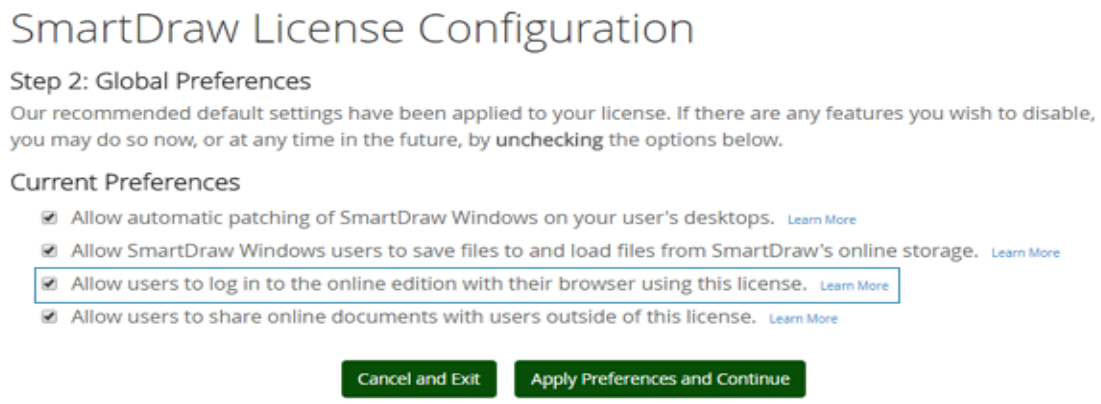
ENABLE OR DISABLE SMARTDRAW ONLINE

SmartDraw online edition is a browser based version of SmartDraw for Windows Desktop that is included on your license. Users can log in to cloud.smartdraw.com and create, edit and share documents in their browsers and on their mobile devices. If your license also contains access to the installed version of SmartDraw for Windows, then users can smoothly transition between their desktop and online for editing documents. By default this feature is enabled, but if you wish to disable access the online edition completely, uncheck this box.



ENABLE OR DISABLE SMARTDRAW ONLINE

Step	Action
1	In the **Step 2: Global Preferences** screen, navigate to **Current Preferences**.
2	2a) To enable SmartDraw Online: Select **Allow users to log in to the online edition with their browser using this license**. OR 2b) To disable SmartDraw Online: De-Select **Allow users to log in to the online edition with their browser using this license**.

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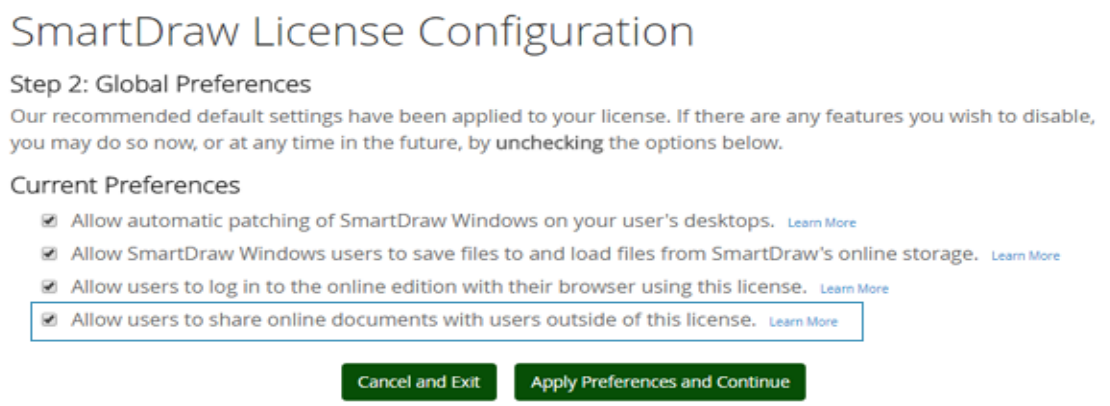
ENABLE OR DISABLE SHARING DOCUMENTS

SmartDraw allows users to share documents with others. This is done by emailing a url link from the document owner to others (whether or not they are SmartDraw users) with whom they wish to share it. This could also include sending share links to users outside of your organization.

SmartDraw also includes a feature allowing a user to embed documents they have created in other websites such as blogs and social media. By unchecking this checkbox you will disable the embedding feature and restrict users to sharing documents only with other users of this license (i.e. they will not be able to share documents with outside users). Users will however still be able to receive shared documents from other users.



ENABLE OR DISABLE SHARING DOCUMENTS

Step	Action
1	In the **Step 2: Global Preferences** screen, navigate to **Current Preferences.**
2	2a) To enable Sharing Documents: Select **Allow users to share online documents with users outside of this license**. OR 2b) To disable Sharing Documents: De-Select **Allow users to share online documents with users outside of this license**.
3	To acknowledge your global preference settings click **Apply Preferences and Continue**.

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MAINTAIN CONTROL OF SMARTDRAW DOCUMENTS

As the license administrator you are able to maintain control of the online documents created by users associated with the license in the event of a termination.

This gives you the following abilities:

- You can edit user email addresses and change them to email addresses you control.
- You can lock users out of SmartDraw online edition.
- If a user account uses an email you control, you can to use the "forgot password" feature to set a new password on their account which will allow you to access their documents.
- In the event of a termination, you can change the email address on a user's account to a new user and have that new user use the "forgot password" feature to set a password and gain access to the former users documents.

Note: Users are unable to edit their own email addresses to prevent them from hijacking a license and/or documents belonging to the company.

MAINTAIN CONTROL OF SMARTDRAW ONLINE DOCUMENTS

Step	Action
1	In the **Step 3: Online User Management** screen, review the information.
2	Click **Continue**.

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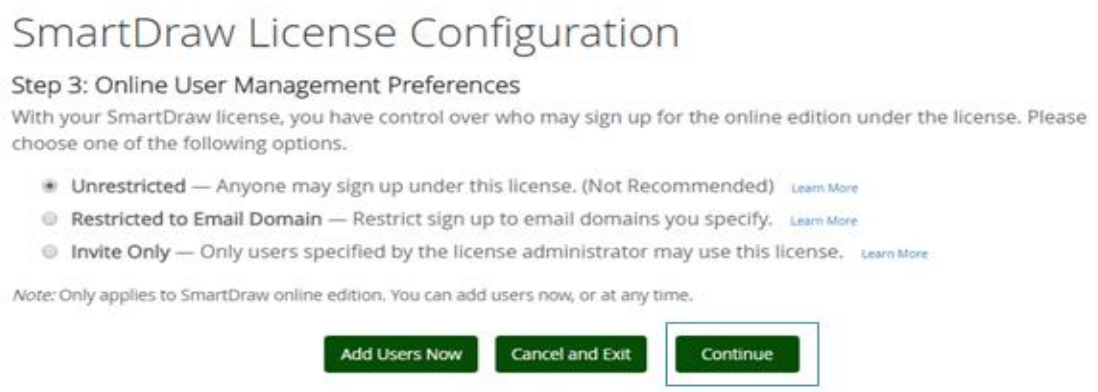
INITIAL SITE LICENSE SETUP WIZARD: SMARTDRAW ONLINE

DETERMINE ONLINE USER MANAGEMENT PREFERENCES

With a SmartDraw Site License, you have control over who may sign up for the online edition under the license. Please choose one of the following options.

- Unrestricted
- Restricted to Email Domain
- Invite Only

Note: Only applies to the SmartDraw online edition. You can add users now, or at any time.



DETERMINE ONLINE USER MANAGEMENT PREFERENCES

Step	Action
1	In the **Step 3: Online User Management** screen, select *the appropriate option from the table below*.
2	Click **Continue** or **Add Users** if desired.

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ONLINE USER MANAGEMENT OPTIONS TABLE

OPTION	DESCRIPTION
Unrestricted — Anyone may sign up under this license**.**	Note, this is NOT recommended. In this mode any user who has possession of your site license key can use this license, including users outside of your organization. And they may do so with whatever email address they choose. This means that you will **not** be able to take over this users account in the event of a termination and you will **not** be able to recover any documents that they produce. You will still be able to see who is using this license and you will be able to remove and block users from using this license, but you will not have control over the documents created by those users whose email address you do not control.
Restricted to Email Domain — Restrict sign up to email domains you specify**.**	This is the most commonly used user management mode In this mode only users with an email address in one of the domains you specify will be able to use this license. This way you can restrict users to using email addresses that you have control over. In the event of a termination, you can use the “forgot password” feature to send a password reset code to that user’s email address (of which you presumably control) in order to reset their password. Also, you will be able to change users email addresses. Users will not be able to change their own email addresses (so they can't change it to one you don't control). You may specify as many email domains as you like. You will not be able to include public email services like @gmail.com or @hotmail.com, etc. The license administrator will still be able to manually add users to the license whose email addresses are outside of these domains for certain exceptions like consultants, etc.
Invite Only — Only users specified by the license administrator may use this license**.**	For managers that want explicit control over their user list. In this mode, only users that you as the license administrator specifically add to this license will be able to use it. This is the most secure, but results in the most work for the license administrator. You will be able to change users email addresses and therefore maintain control over their accounts. To add new users, you will have to manually add them through the license management interface.

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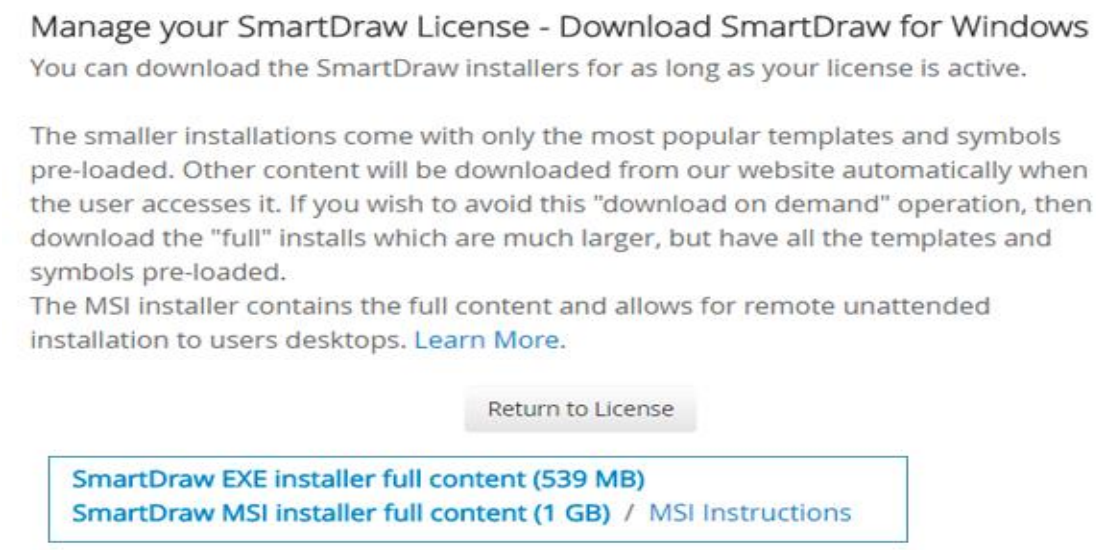
DOWNLOAD YOUR SMARTDRAW SITE LICENSE

Congratulations! Your site license is now configured and your users can begin using it immediately. After downloading, you can install the software on your user's workstations, or you can provide them with access to the installer to do it for themselves. During the installation, you will be prompted for a license key.



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DOWNLOAD YOUR SMARTDRAW SITE LICENSE

Step	Action
1	In the **SmartDraw Site License Configuration: Configuration Complete** screen, click ***Click here to download your software*** *link*. ***Note****: You will be prompted for a license key. Copy and paste your license key from this screen into the appropriate field.*
2	Navigate below the Return to License button. Select the appropriate **SmartDraw installer**.

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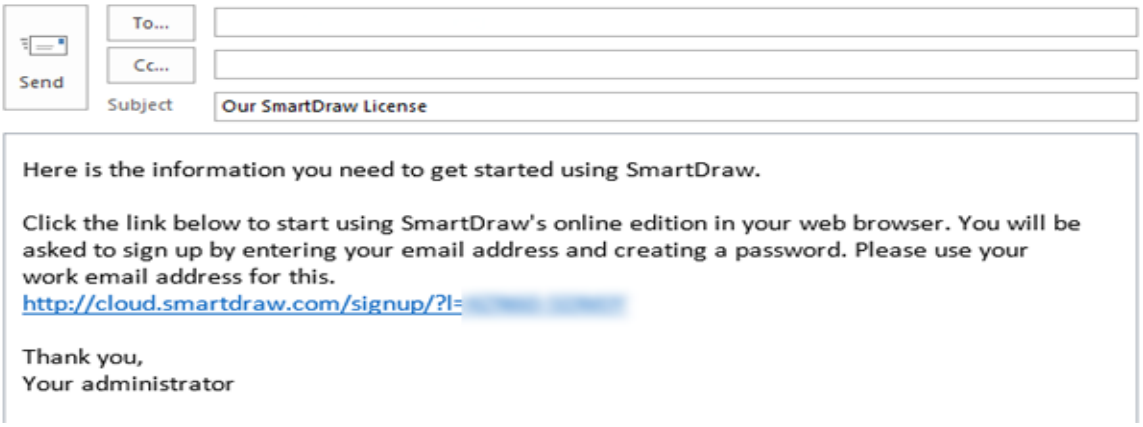
SEND AN AUTO-GENERATED EMAIL TO YOUR NEW SMARTDRAW USERS

In just a few clicks, you can send an auto-generated email to your SmartDraw users with instructions for them to create an account and login with this license.



SEND AN AUTO-GENERATED EMAIL TO YOUR NEW SMARTDRAW USERS

Step	Action
1	In the **SmartDraw Site License Configuration: Configuration Complete** screen, navigate to the ***3rd paragraph***.
2	Click ***Here is an email*** *link*.
3	Enter *the appropriate email addresses* in the **To** field.
4	Click **Send**.

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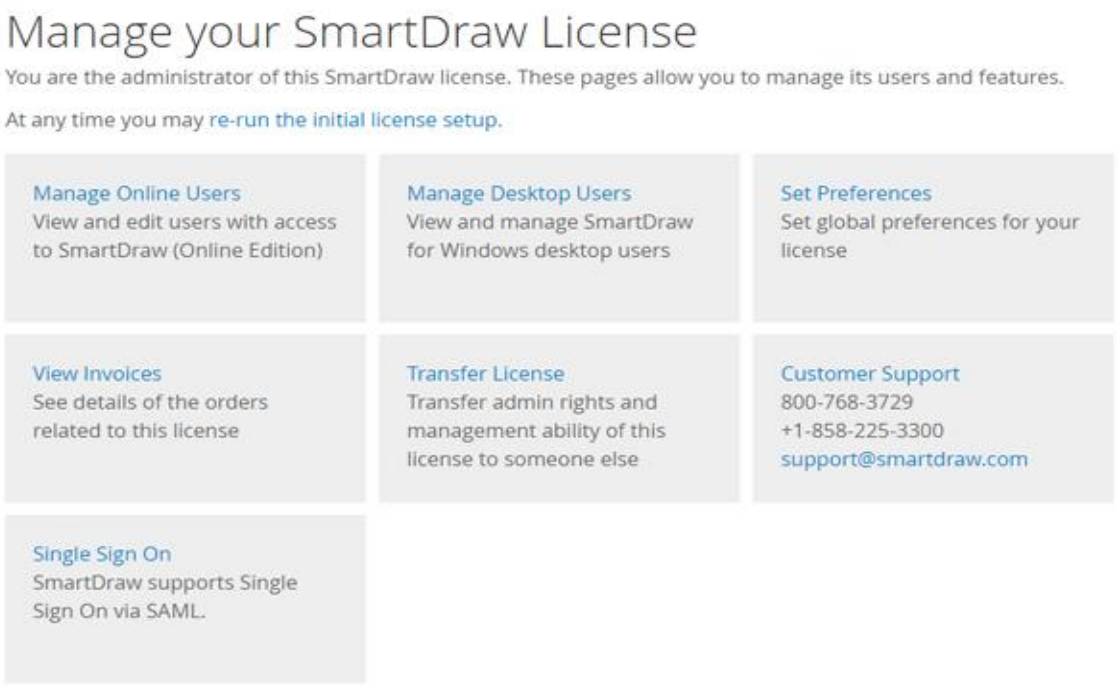
MANAGING YOUR SITE LICENSE



When managing your Site License, you can easily return to this screen simply by clicking Return to License Page.

RE-RUN THE INITIAL LICENSE SETUP

As the license administrator you are able to manage users and features. In the case that you wish to re-run the initial license setup, you are a few clicks away.

RE-RUN THE INITIAL LICENSE SETUP

Step	Action
1	Navigate to the **Manage your SmartDraw Site License** screen.
2	Click ***re-run the initial license setup*** *link*.

SEARCH FOR AN ONLINE USER

Search for any particular user or group of users using the search functionality. The system will dynamically bring up the record(s) that meet your search criteria.

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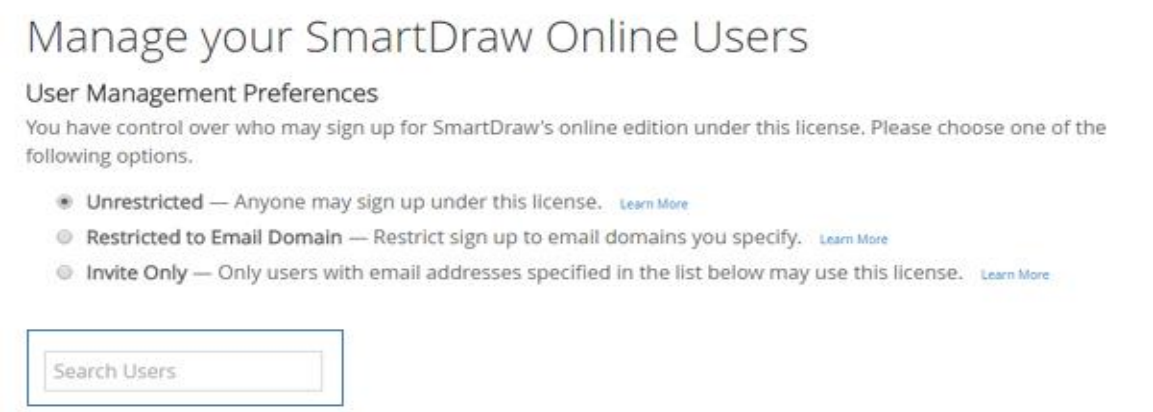

SEARCH FOR A USER

Step	Action
1	In the **Manage your SmartDraw Site License** screen, click **Manage Online Users**.
2	Enter *the appropriate criteria* in the **Search Users** field.

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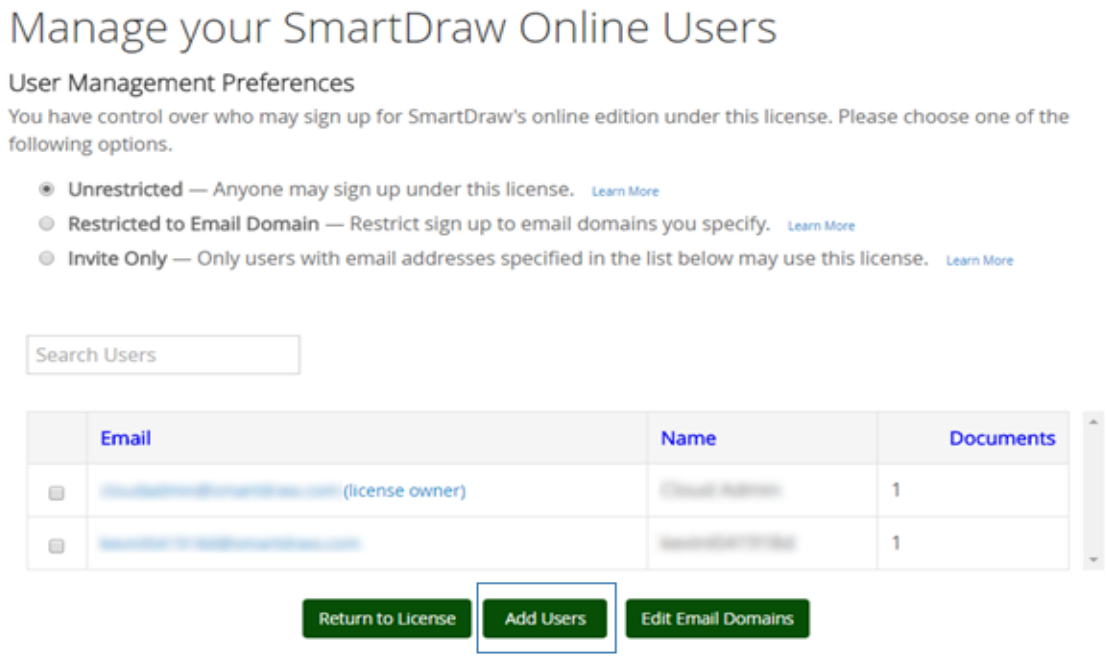
ADD A USER

You may add one or more users by entering their names and email addresses.

You cannot add users that are already on another SmartDraw License. They must first change the email address on their old account or remove it from the old license. If you attempt to add a user who already owns an existing SmartDraw license you will receive the following error message: We could not add the following users to this license. Note, you cannot add users that are already on another SmartDraw License. They must first change the email address on their old account or remove it from the old license.



ADD A USER

Step	Action
1	In the **Manage your SmartDraw Site License** screen, click **Manage Online Users**.
2	Click **Add Users**. You may add one or more users by entering their names and email addresses into the box. Enter or paste *one user per line* in the field.
3	*(Optional)* Select **Send an email to each added user with a link to setup their SmartDraw online account**.
4	Click **Save Users**. Click **X** to close window.

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REMOVE A USER

Removing users from this license removes your ability to control that user account. You will no longer be able to edit their name/email address and you will no longer be able to gain access to their online documents. Additionally, they will keep any documents that they have in their account.

If you do not wish them to be able to access the documents on their account, you should disable their account instead of removing it. Or login to their account and delete all the files before removing them from the license.

REMOVE A USER

Step	Action
1	In the **Manage your SmartDraw Site License** screen, click **Manage Online Users**.
2	Click Add Users.
3	Select the appropriate email address(es).
4	Select Remove. ***Note**: You will be prompted with a final confirmation "Are you sure you want to remove the selected user(s)?"*
5	Select **Yes, Remove the User(s)** OR **No, Cancel**.

DISABLE OR RE-ENABLE A DISABLED USER

DISABLE OR RE-ENABLE A DISABLED USER

Step	Action
1	In the **Manage your SmartDraw Site License** screen, click **Manage Online Users**.
2	Click **Add Users**. Select the *appropriate email address(es)*.
3	To disable a user: Select **Disable**. ***Note**: The email address will be striked and "[disabled]" will appear after each email address that has been disabled.*
4	To re-enable a disabled user: Select the *disabled users.* Click **Enable**. ***Note**: The email address will no longer be striked and "[disabled]" will no longer appear after each email address.*

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EDIT EMAIL DOMAIN(S)

Only users with email addresses within predetermined domain(s) can use the Site License.

RE-RUN THE INITIAL LICENSE SETUP

Step	Action
1	In the **Manage your SmartDraw Site License** screen, click **Manage Online Users**.
2	Click **Edit Email Domains**.
3	Enter (or paste) *domains in the format @yourdomain.com in the box separated by commas, spaces, tabs or carriage returns*.
4	Click **Save Domains**.

DETERMINE WHICH WINDOWS MACHINE(S) CAN USE SMARTDRAW

View and manage the desktops on which SmartDraw Windows is installed.

DETERMINE WHICH WINDOWS MACHINE(S) CAN USE SMARTDRAW

Step	Action
1	In the **Manage your SmartDraw Site License** screen, click **Manage Desktop Users**.
2	2a) Search by computer name: Enter *the appropriate criteria* in the **Search by Computer Name** field. OR 2b) Use the **Show** drop-down menu to display All, Enabled, or Disabled.
3	Select the *appropriate windows machines*.
4	Click **Return to License**.

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SET GLOBAL PREFERENCES

Enable and disable features of your Site License. These affect all users under your license.

If you'd like to have more information about each of the Global Preferences, simply click the Learn More link. Each Learn More link provides additional information regarding each of the preferences.

SET GLOBAL PREFERENCES

Step	Action
1	In the **Manage your SmartDraw Site License** screen, click **Set Preferences**.
2	2a) To accept the default settings, select **Apply Preferences**. OR 2b) To modify, deselect the *appropriate preference*. Select **Apply Preferences**. ***Note**: The message "Preferences Updated" will appear at the top of the screen.*
3	Click **Return to License**.

VIEW INVOICES

See details of orders related to your site license.

VIEW INVOICES

Step	Action
1	Navigate to the **Manage your SmartDraw Site License** screen.
2	Click **View Invoices**.

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PRINT AN INVOICE

The invoice will print to your default printer. If you prefer a pdf of the invoice simply select the appropriate printer setting.

PRINT AN INVOICE

Step	Action
1	In the **Manage your SmartDraw Site License** screen, click **View Invoices**.
2	Click **Print**. In the **Print** screen, select the *appropriate settings*.
3	Click **Print**. Click ***Return to License Detail*** *link.*

TRANSFER ADMIN RIGHTS TO A COLLEAGUE

Transferring admin rights is a 2 step process. First, the system will send an email invite to the New Administrator. Second, the New Administrator will be prompted to accept the invite.

During the transfer of admin rights process you will be prompted to confirm the transfer with the following message, "Are you sure you want to transfer the admin rights of this license?"

An email will be sent to the address you specified with a link to accept the transfer. You will remain the admin of this license until they do so."

Note: This will not affect other users on the license.

TRANSFER ADMIN RIGHTS TO A COLLEAGUE

Step	Action
1	In the **Manage your SmartDraw Site License** screen, click **Transfer License**.
2	Enter the *appropriate email address* in the **New Admin Email Address** field.
3	Click **Continue**.
4	Review the new admin's email address, the prompt, then click **Confirm Transfer**.

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SITE LICENSE SUPPORT

CONTACT SITE LICENSE SUPPORT

CALL SITE LICENSE SUPPORT

Our Site License Support Team is here to help. You can call 858-225-3300 Monday through Friday from 8 am to 7 pm Central Time. We will respond to you within about one business day.

The Site License Support Team can also be reached from within SmartDraw. Simply navigate to the top right hand corner of the Work Area and click the icon of the person with a headset. You'll have the option to call OR enter your Question or Request in the window. Then click Submit.

CALL SITE LICENSE SUPPORT

Step	Action
1	Navigate to the **Manage your SmartDraw Site License** screen.
2	Access the numbers listed below the *Site License Support* link.

EMAIL SITE LICENSE SUPPORT

In just one click, the system will automatically prompt a new email to SmartDraw's Site License Support Team.

The auto generated email will be addressed to the Site License Support Team and the Subject line will automatically include your unique Site License ID to ensure a prompt response.

EMAIL SITE LICENSE SUPPORT

Step	Action
1	Navigate to the **Manage your SmartDraw Site License** screen, click **Site License Support** OR **support@smartdraw.com** link.
2	Enter the *appropriate message.* Click **Send**.

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