Edition notice

Technical specifications and availability subject to change without notice.
This document may not be reproduced, disseminated to third parties or processed and its contents may not be used or disclosed without express permission. Non-compliance shall result in compensation for damages. All rights, including those resulting from a successful patent application and registration of a utility model or design patent, are reserved.

Edition: --
Document ID: A6V12050070_en_a

© Siemens Switzerland Ltd, 2020
Cybersecurity disclaimer

Siemens provides a portfolio of products, solutions, systems and services that includes security functions that support the secure operation of plants, systems, machines and networks. In the field of Building Technologies, this includes building automation and control, fire safety, security management as well as physical security systems.

In order to protect plants, systems, machines and networks against cyber threats, it is necessary to implement – and continuously maintain – a holistic, state-of-the-art security concept. Siemens' portfolio only forms one element of such a concept.

You are responsible for preventing unauthorized access to your plants, systems, machines and networks which should only be connected to an enterprise network or the internet if and to the extent such a connection is necessary and only when appropriate security measures (e.g. firewalls and/or network segmentation) are in place. Additionally, Siemens' guidance on appropriate security measures should be taken into account. For additional information, please contact your Siemens sales representative or visit https://www.siemens.com/global/en/home/company/topic-areas/future-of-manufacturing/industrial-security.html.

Siemens' portfolio undergoes continuous development to make it more secure. Siemens strongly recommends that updates are applied as soon as they are available and that the latest versions are used. Use of versions that are no longer supported, and failure to apply the latest updates may increase your exposure to cyber threats. Siemens strongly recommends to comply with security advisories on the latest security threats, patches and other related measures, published, among others, under https://www.siemens.com/cert/en/cert-security-advisories.htm.
# Table of Contents

1  Account Manager User Guide ................................................................. 5
  1.1 Overview ...................................................................................... 5
  1.2 Getting started ........................................................................... 5
  1.2.1 Signing up .............................................................................. 5
  1.2.2 Activating a Subscription ..................................................... 7
  1.2.3 Creating a Company ............................................................. 7
  1.2.4 Choosing one or more Products ............................................ 8
  1.2.5 Accepting Invitations for Organizations with subscriptions of Type 2: Automatically renewable subscription ...................................................... 8
  1.3 Managing my profile .................................................................. 10
  1.3.1 Managing My Memberships .................................................. 10
  1.3.2 Editing my Siemens ID Account ......................................... 11
  1.3.3 Deleting my Siemens ID Account ........................................ 13
  1.4 Editing Company Settings .......................................................... 14
  1.4.1 Editing Company Information .............................................. 14
  1.5 Managing Clients ...................................................................... 15
  1.5.1 Creating a New Client ......................................................... 15
  1.5.2 Editing Client Information .................................................... 17
  1.5.3 Removing a Client ............................................................... 18
  1.5.4 Switching Between Clients ................................................. 19
  1.6 Managing Users ........................................................................ 20
  1.6.1 Inviting Users ....................................................................... 20
  1.6.2 Managing Invitations .......................................................... 21
  1.6.3 Suspending and Resuming Memberships .............................. 25
  1.6.4 Removing User Memberships ............................................. 28
  1.6.5 Changing User Permissions ............................................... 29
  1.7 Managing Subscriptions .............................................................. 29
  1.7.1 Upgrading and Adding On Subscriptions .............................. 30
  1.7.2 Renew Expired Subscriptions ............................................. 30
  1.7.3 Managing Subscriptions in Subscription Manager ................ 31
  1.8 Troubleshooting and FAQ .............................................................. 31
1 Account Manager User Guide

1.1 Overview
Account Manager is a service that allows you to manage your company account. In particular this service offers:

- User and User Invitation Management: Manage memberships of the company and its clients, invite new users, and manage pending invitations.
- Access Management: Manage access and permissions of users for the company and its clients.
- Subscription Management: Manage the company's subscriptions and extend or upgrade active subscriptions.
- Client Management: Create and manage clients to organize the assets of a company, including access management.

The service is applicable for all cloud offerings.

1.2 Getting started
This section will cover how to get started in Account manager, including how to sign up, activate your subscription, create a company, and choose your products.

1.2.1 Signing up
To sign up for Account Manager, follow the steps below.

1. Navigate to the Account Manager landing page.
2. Click Log In / Sign Up.
3. Select the Sign Up tab and complete the fields to create a Siemens ID.
4. Select the checkbox to agree to the license terms and click Sign Up to confirm. Keep this tab in the browser open.
5. Check your inbox for an email from Siemens ID. Select Confirm my account in the email.

Verify your email address

To make your Siemens ID account more secure and allow access to the applications, please use the button below to verify your email address. A confirmation message will appear subsequently.

Verify my email

You must verify your email address until June 24, 2020.

Or paste this link into your browser:

https://login-qa.siemens.com/u/email-verification?ticket=dA9XG/335i2NEMbb9piXfdHFyYx2ao#

6. Navigate back to the initial tab and select Continue.
1.2.2 **Activating a Subscription**

To activate your License Server Management (LMS) subscription, follow the steps below:

1. In Account Manager:
   1. You will receive an email with your license and subscription. Click on the hyperlink available on the Entitlement ID. This will take you to the Account Manager Landing Page.
   2. Click **Log In / Sign Up**.
   3. Log in with your Siemens ID. If you have not already registered as a Siemens ID User, see **Signing Up**.
   4. Your entitlement ID will be auto-filled. If not, copy and paste the entitlement ID from your email into the entitlement ID field.

5. Once the entitlement ID is verified, proceed to the next step.

1.2.3 **Creating a Company**

After verifying the entitlement ID, create a company using the steps below.

1. In Account Manager:
   1. Select a company that the subscription belongs to or create a new company.
   2. To create a new company, fill out the create new company fields.
3. Select the checkbox next to the access agreement.
4. Click **Continue**.

### 1.2.4 Choosing one or more Products

After creating or selecting a company, follow the steps below to choose your products.

- In Account Manager:
  1. Select the checkbox next to the feature packages you want to activate.
  2. Click **Continue**.
  3. Review the details of your subscription.
  4. To confirm your selection and to finish activating your subscription, click **Activate**.
1.2.5  
**Accepting Invitations for Organizations with subscriptions of Type 2: Automatically renewable subscription.**

When accepting an invitation for an organization with Type 2 subscriptions, follow the steps below.

▷ In Account Manager:

1. You will receive an email invitation for a selected organization with a Type 2 subscription. Navigate to your email and click on the link to accept the invitation.

```
Dear [Name],

Welcome to SI Digital Services.
You have been invited by [Inviter] to join the company ZuoraDemoOrg.

Kindly click on the link below to accept the invitation and get access:
Click here to accept the invitation

Sincerely,
Siemens
```

--- This is an automatically generated email. Please do not reply! ---

2. The link will take you to the Account Manager landing page. Click Log in / Sign up and log in using your Siemens ID.

3. After logging in, you will be taken to an Accept Invitation page with a pre-populated invitation key. Click Save to accept the invitation.

```
Accept Invitation
To accept the invitation, enter the key that you received by email.

Invitation key: [Key]

Save
```

4. Once you accept the invitation, you will be taken to the Overview page. Use the Navigation tab to see your Type 2 subscriptions.
1.3 Managing my profile

This section will cover how to manage your profile in Account Manager and the Siemens ID Self Service Portal. This will include how to manage your memberships and how to edit your Siemens ID.

1.3.1 Managing My Memberships

To manage your memberships, follow the steps below.

▶ In Account Manager:
▶ In the My account tab, navigate to the My memberships section.

In this section you will be able to see the following information:

- Company name
- Your role
- Option to leave the company

Leaving a Company

To leave a company, follow the steps below.

▶ In Account Manager:
1. In the My account tab, navigate to the My memberships section.
2. Under the My memberships section, navigate to the company you want to leave.
3. To leave, click Leave.
4. To confirm to leave the company, click Yes. After confirming, a message in the lower right corner will indicate that you have left the company.

### 1.3.2 Editing my Siemens ID Account

To edit your Siemens ID Account, follow the steps below.

- In Account Manager:
  1. In the My account tab, navigate to the Edit my account section.
  2. Click Edit. A new tab will pop-up that will lead you to the Siemens ID Self Service Portal.

In the Siemens ID Self Service Portal you will be able to:
- Change name
- Change email
• Change password
• Enable multi-factor authentication

Changing Name
To change your name, follow the steps below.
▷ In the Siemens ID Self Service Portal:
1. Click **Change Name**.
2. Edit the name fields.
3. To save the changes, click **Save**.

changing email
To change your email, follow the steps below.
▷ In the Siemens ID Self Service Portal:
1. Click **Change Email**.
2. Edit the field.
3. To update the new email address, click **Submit Request**.

When you request to change your email, a verification email will be sent to the new address. You will not be able to log in again until after you verify your new email address.

changing password
To change your password, follow the steps below.
▷ In the Siemens ID Self Service Portal:
1. Click **Change Password**.
2. Click **Request Email**. After submitting your request, an email will be sent with a link to change your password.

### Enable Multi-factor Authentication
To enable multi-factor authentication, follow the steps below.

- In the Siemens ID Self Service Portal:
  1. Click **Multi-Factor-Authentication**.
  2. Click **add authentication method**. After submitting your request, an email will be sent with a link add an authentication method.

### Deleting my Siemens ID Account
To request the deletion of your Siemens ID Account, you must leave all your memberships. To continue, follow the steps below.

- In Account Manager:
  1. In the **My account** tab, navigate to the **Edit my account** section.
  2. Click **Request deletion**.
3. To confirm deleting your account, click **Delete**.

### 1.4 Editing Company Settings

#### 1.4.1 Editing Company Information

To edit company information, follow the steps below.

1. In **Asset Manager**:
   1. In the **Overview** tab, click **Edit**.
   2. Edit the appropriate fields, except for the company name and address.
   3. Click **Update** to confirm the changes.
1.5 Managing Clients

Clients allow users to organize sites and user access in a more fine-grained way. Clients can be used to group sites and manage user access that may vary to each user for your company.

1.5.1 Creating a New Client

To create a new client, follow the steps below.

1. Click the Avatar Icon in the right corner.
2. In the drop down menu, click Create new client.
3. In the form, fill out the following fields. Click Create.
4. A success message will appear after creating a client. In the pop-up message you will have the option to invite a new user to the client or to onboard a new site.
When creating a client, it will appear the same way as an organization.

1.5.2 Editing Client Information
To edit client information, follow the steps below.

1. In Account Manager:
   - In the Overview tab, click Edit.

2. In the form, edit the fields you want to change.

3. Click Update.
4. A message will appear when your changes are updated successfully.

1.5.3 Removing a Client
To remove a client, follow the steps below.

1. In the Overview tab, click Edit.

2. Click Delete.
3. In the pop up, to confirm deleting the client, click **Delete**.

![Delete Client](image)

4. A message will appear when your client is deleted successfully.

1.5.4 **Switching Between Clients**

To switch between clients, follow the instructions below.

- **In Account Manager:**
  1. The name of the client you are currently in will appear below the navigation bar. To switch clients, click the Avatar icon.

  ![Account Manager](image)

  **Client Overview**

  ![My apps](image)

  2. In the drop down menu, click **Select company**.
3. Click on the client you want to switch to.

4. Verify the name of the company you switched to by looking under the navigation bar.

1.6 Managing Users
This section will cover how to manage users, including how to invite users, remove memberships, and change user permissions.

1.6.1 Inviting Users
To invite users to a company, follow the steps below.

- In Asset Manager:
  1. In the Users tab, click Invite.
2. Fill in the name, email, and select the role of the user you want to invite.

3. To confirm the invitation, click **Send**. The user will be sent an email invitation to join the company.

The roles that are listed in the above figure are exemplary. These roles may differ based on your product.

1.6.2 Managing Invitations

This section will cover how to manage pending and expired user invitations.

**Re-sending Pending and Expired Invitations**

To re-send a pending or expired invitation, follow the steps below.

- In Account Manager:
  1. Navigate to the **Invitations** tab.
  2. Find the user by using the search box or by navigating to the user.
3. In the drop down menu of the search box, select which field you want to search under.

4. Type in the appropriate field and press enter.

5. Select the user.

6. To re-send an invitation, click **re-send** or use the drop down menu.

7. Confirm by clicking **Re-invite**.
8. A success message will indicate if the invite was successfully sent.

Re-invite confirmation
Do you want to re-invite [xxx] to Account Manager as Engineer?

Revoking Pending and Expired Invitations
To revoke a pending or expired invitation, follow the steps below.

1. Navigate to the Invitations tab.
2. Find the user by using the search box or by navigating to the user.

3. In the drop down menu of the search box, select which field you want to search under.
4. Type in the appropriate field and press enter.
5. Select the user.

6. To revoke an invitation, click **revoke** or use the drop down menu.

7. Confirm by clicking **revoke**.

8. A success message will indicate if the invite was successfully revoked.
1.6.3 Suspending and Resuming Memberships
This section will cover how to suspend and resume user memberships.

Suspending User Memberships
To suspend a user membership, follow the steps below.

1. In Account Manager:
   a. Navigate to the Users tab.
2. Find the user by using the search box or by navigating to the user.
   3. In the drop down menu of the search box, select which field you want to search under.
4. Type in the appropriate field and press enter.
5. Select the user.
6. To suspend a user, click **Suspend** or use the drop down menu.

7. Confirm by clicking **Yes**.

8. A success message will indicate if the user's membership was successfully suspended.

**Resuming User Memberships**

▷ In Account Manager:

1. Navigate to the **Users** tab.
2. Find the user by using the search box or by navigating to the user.
3. In the drop down menu of the search box, select which field you want to search under.

4. Type in the appropriate field and press enter.

5. Select the user.

6. To resume a user membership, click Resume or use the drop down menu.

7. Confirm by clicking Yes.
8. A success message will indicate if the user's membership was successfully resumed.

1.6.4 Removing User Memberships

To remove users from a company, follow the steps below.

- In Asset Manager:
  1. In the Users tab, navigate to the user you want to remove.
  2. Click Remove.
  3. To confirm removing the user, click Remove.
1.6.5 Changing User Permissions

To change users permissions in a company, follow the steps below.

1. In Asset Manager:
   a. In the Users tab, navigate to the user you want to change permissions for.
   b. In the drop down menu, select the role.

2. To confirm the role change, click Yes.

1.7 Managing Subscriptions

This section will cover how to manage your subscriptions, including how to upgrade, add on, and renew subscriptions.
1.7.1 Upgrading and Adding On Subscriptions
To upgrade or add on a subscription, follow the steps below.

In Account Manager:
1. In the Subscriptions tab, navigate to the subscription you want to upgrade or add on.
2. Click Add-on.
3. Enter the entitlement ID of the new subscription. The entitlement ID is located in the certificate location email you will receive after purchasing a product. Once verified, click Continue.
4. Select which feature packages you want to activate. Click Continue.
5. Review your subscription and click Activate to confirm. Your new subscription will appear in the list of subscriptions.

1.7.2 Renew Expired Subscriptions
To renew an expired subscription, follow the steps below.

In Account Manager:
1. In the Subscriptions tab, navigate to the subscription you want to renew.
2. Click Renew.
3. Enter the entitlement ID of the new subscription. The entitlement ID is located in the certificate location email you will receive after purchasing a product. Once verified, click Continue.
4. Select which feature packages you want to activate. Click Continue.
5. Review your subscription and click Activate to confirm.
1.7.3 Managing Subscriptions in Subscription Manager

To manage your Type 2 subscription in Account Manager, follow the steps below.

1. Navigate to the Subscriptions tab.
2. Click Manage Subscriptions.

3. After clicking, you will be taken to Subscription Manager.

Subscription Manager

Subscription Manager is a service that allows you to manage your Type 2 subscriptions. This service includes:

- Viewing Subscriptions
- Viewing Invoices
- Viewing Address Information
- Choosing and Viewing Payment Methods

1.8 Troubleshooting and FAQ

This section covers any common troubleshooting issues and frequently asked questions (FAQ).