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Admin Console
Administrator Guide

Admin Console Administrator Guide

Overview

Admin Console add-on is a Cloud-based portal that serves as a central location for administrators to manage PDFTechnologies, Inc. products and users across their organization. The Administrator can open the URL provided by PDFTechnologies, Inc. and log in to get started. The Admin Console allows administrators to do the following:

1. Overview of the licenses and products

2. Assign licenses for a team or a member

3. Cancel license for team members

4. Manage teams such as creating a new team, or deleting a team.

5. Manage devices for quick license unbinding

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Chapter 1 - Set up and Activate

If you have already bought PDF Reader Pro for Team / PDFTech Editor licenses, please contact us to get access to the Admin Console.

How to Access to Admin Console

1. Contact us at support@pdfreaderpro.com and provide below information:
   - Super Admin Email Account
   - User Name
   - Organization Name
   - Order Information (eg. Purchase Time, Subscription Email, Order Number)
2. We will send you an email that contains the Console Login URL, password and super admin account.
3. Open the URL to access to the login page, enter your email address and password to log in.

After logging in, you can start your first step: Assign License Codes to Members.

Fast Assign License Codes to a Member

1. Invite a Members to Join Team

   • Go to Team Management -> Manage Member;

   • Click Add Member in the upper left corner;

   • Enter his email, name, and choose a team for him (Default Team) -> click Add.

   • The member will receive an invitation email.
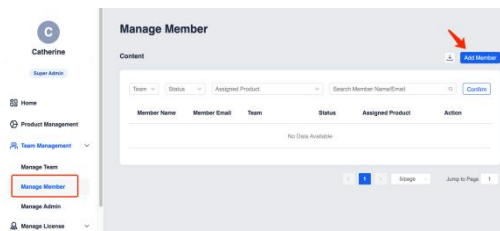
   Note: Invited member should check his email and confirm the invitation before proceeding to the next step.

2. Assign License to a Member

   • Go to Manage License -> Assign License;

   • Choose Team (Default Team), Email and Product -> Assign
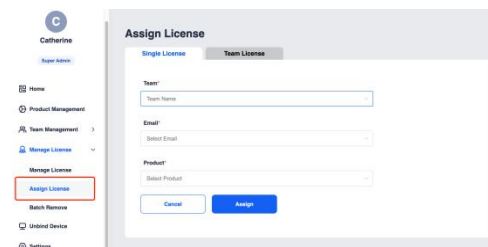
3. The Member Activate His License

   After assigning successfully, the member will receive an email containing a license code, just follow the instructions to download the APP for activation.
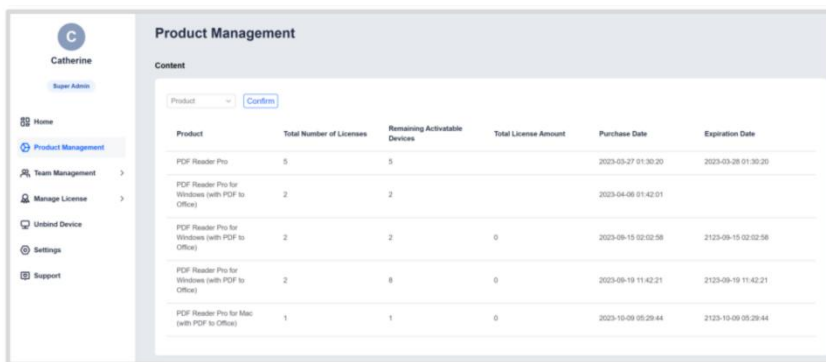
Chapter 2 - Home

The Home Page displays the summary of data such as your **Total Licenses**, **Total Activatable Devices**, **Remaining Activatable Devices**, and **Activated Devices**, which allows you to take a glance at the usage of your team licenses within your organization.
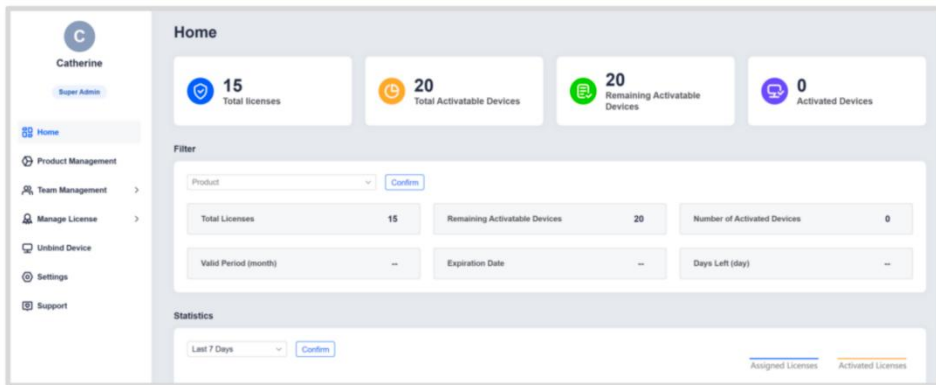
In addition, you can view the activation status of your team license codes over a period of time in a graph, which you can select from the last 7 days, a month or a customized time period.

Chapter 3 - Product Management

In this tab, you can view the license information in each order. For example, the **Total Number of Licenses**, **Remaining Activatable Devices**, **License Purchase Date** and **Expiration Date**.

Click on the filters in the upper left corner to select products.

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Chapter 4 - Team Management

Manage Team

In the Manage Team section, the Admin Console can create, edit and delete the team to help manage a newly started project.

● **Create Team**

1. In the Admin Console, navigate to **Team Management** -> **Manage Team**;

2. Click on **Create Team** on the upper right;

3. In the Create Team page,

   - Team Name: the name of the team;

   - Team Description: a brief and concise description that accurately represents the team;

   - Team Admin: all team members except for the Super Admin can be designated

     as Team Admin;

   - Product: product that the Super Admin assigns to the team;

   - Amount of Team License: the number of licenses of the current product the
     Super Admin assigns;

4. Tap **Save**, the team has already created successfully.
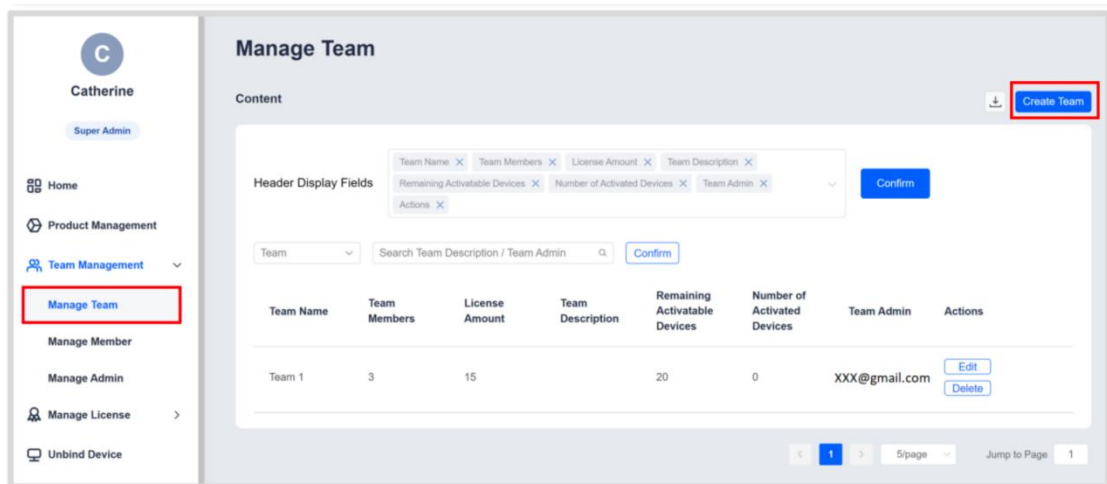
Note: Click on ⊕ to add Product and Amount of Team License.

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● Edit Team

1. In the Admin Console, navigate to **Team Management** -> **Manage Team**;

2. Click on **Edit** under Action;

3. In the Edit Team page,

   - Team Name: the name of the team;

   - Team Description: a brief and concise description that accurately represents the

team;

   - Team Admin: add or remove team admin in the previously designated Team Admin;

   - Product: product that the Super Admin has assigned to the team;

   - Amount of Team License: the number of licenses of the current product the Super
   Admin has assigned;

4. Tap **Save** to save the modified information.

Note:

- Only the Super Admin can change Amount of Team License and Team Admin;

- The company name or team name provided by the Super Admin during registration will become the name of default team. When the team is a default team, Product and Amount of Team License can't be changed in the Edit Team page.

● Delete Team

1. In the Admin Console, navigate to **Team Management** -> **Manage Team**;

2. Click on **Delete** under Action;

3. Tap **Delete** on the pop-up window to confirm again.

Note：

- Only the Super Admin can delete the team;

- After deleting the team, the members in the team will be automatically assigned to the default team
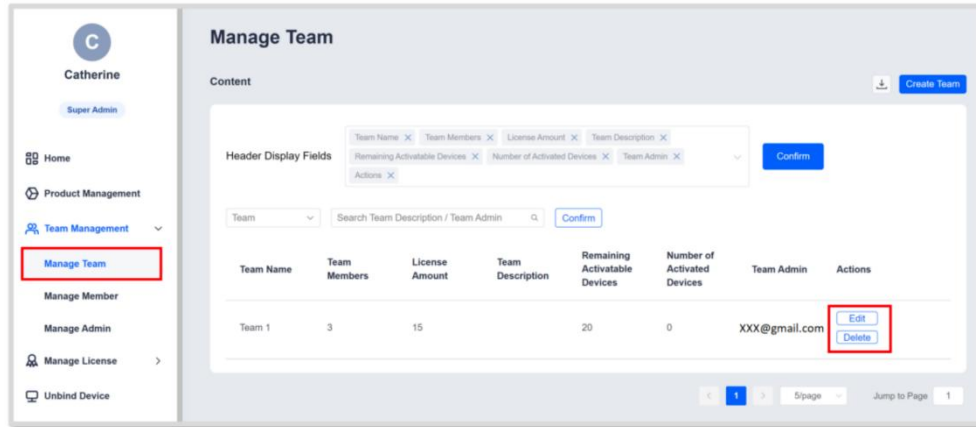
Manage Member

When a team member leaves or a new member joins the team, the Super Admin or Team Admins can remove/add members from the team list in the Manage Member section.

● Delete Member

1. In the Admin Console, choose **Team Management** -> **Manage Member**;
2. Click **Delete** under Action;
3. Tap **Delete** on the pop-up window to confirm again.

Note:
- The device of the deleted member will be automatically unbound;
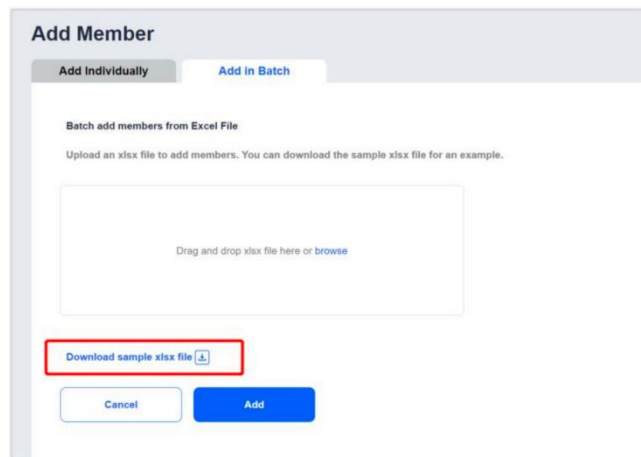- The quota of a member's license will be automatically returned to the original team.

● Add Member

1. In the Admin Console, choose **Team Management** -> **Manage Member**;
2. Click **Add Member** at the top right corner;

- Add Individually: If you only need to add a single or a few members to your team, you can select Add Individually.

  - Member Email: the email address that team members use to receive license code.

  - Member Name: the name of the member.

  -Team: Select a team for the member via the drop-down box.

  Note: When the [Add Successfully!] prompt appears, the invitation is sent successfully. Please wait for the member to confirm.

- Add in Batch: If you need to add many members to a team, to simplify the workflow you can add them in batch.

  a) Download the sample xlsx file and enter your member information into the sample file, including member email, member name, and team name;

  b) Upload the xlsx file to Add Member page, and click Add.

3. Team members should check their email and click the link to join the team.

- ## Edit Member

When a member needs to be moved to another team, or the email account information is updated, the Super Admin or Team Admin can go to Manage Member section and edit member information.

1. In the Admin Console, choose **Team Management** -> **Manage Member**;

2. Click **Edit** under Action;

   In the edit page, you can modify Member Name/Member Email and change member's Team.

3. Tap **Save** to save the changes.

Manage Admin

A team has one Super Admin and multiple general Team Admins. In the Manage Admin section, the Super Admin can add, edit, and delete Team Admins if the Super Admin need.

● Add Team Admin

1. In the Admin Console, navigate to **Team Management** -> **Manage Admin**;

2. Click on **Add Admin** on the upper right;

   - Admin Email: email of the member that has been approved as Team Admin;

   - Team to manage: the team assigned to the Team Admin by the Super Admin；

3. Tap **Add** to send the email.

4. The authorized Admin needs to enter the registration page through the link in the email, then fill in the information on the page and confirm the registration.

Note:

- Only the Super Admin can add Team Admin;

- If invited members are not registered, they'll receive a randomly generated password with the invitation email to sign in. Afterward, they can change the password. If already registered, they can directly sign in by clicking the link in the email.

- The invited members' information will be displayed on the Manage Admin page after they sign in.

● Edit Team Admin

1. In the Admin Console, navigate to **Team Management** -> **Manage Admin**;

2. Click on **Edit**;

   - Admin Email: email of the member that has been approved as Team Admin;

- Team to manage: the team assigned to the Team Admin by the Super Admin;

3. Tap **Save** to save the modification.

Note:

- Editing Team Admin means that after confirming the Team Admin's email, reassign the teams managed by the Team Admin;

- To change a Team Admin's email, the Super Admin can delete the existing Team Admin and then re-add Team Admin with the new email in Manage Admin section.

● **Delete Team Admin**

1. In the Admin Console, navigate to **Team Management** -> **Manage Admin**;

2. Click on **Delete**;
3. Tap **Delete** on the pop-up window to confirm again。

Note：
-The team affiliation of the deleted Team Admins remains unchanged, only their

management permissions for the team are revoked.

Chapter 5 - License Management

Assign License

In the Assign License segment, the Admin can assign licenses for all members in a team or a single member. Go to **License Management** and choose **Assign License**;

1. **Single License**

    In this Tab, the Admin can assign a license for a single member.

- Team: the team that the member belongs to.

- Email: used for team members to receive license codes.

- Product: the product that a member is authorized to use.

2. **Team License**

In this tab, the admin can assign licenses for a team so that all the members of this team can access the product.

Just simply choose a Team and a Product, then click Assign.
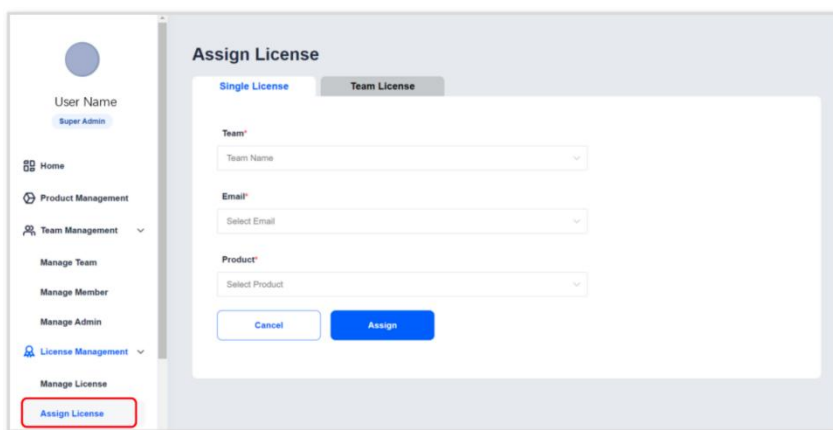

Note:

- The Super Admin can assign licenses to all teams, whereas Team Admins can only assign licenses to the teams they manage.

Remove Licenses

The remove of a license for a team member means that this member will not be able to activate the product with this license code later on. If a member leave your team, you can remove the license.

● Remove License for a Single Member

1. Go to **License Management** and choose **Manage License**;
2. Choose a member from the list, or quickly find a member by using the filter/search bar above;
3. Click **Remove** under Action;
4. A pop-up window will ask you to confirm the cancellation, click **Remove**.
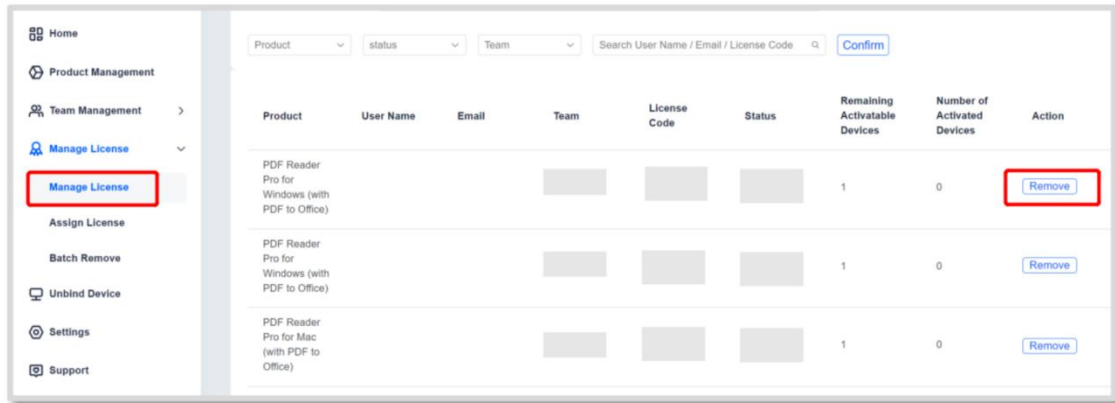
● Remove License in Batch

If the Super Admin and Team Admins need to remove many members' licenses, this function can help them save a lot of time.

1. In the Admin Console, navigate to **License Management** -> **Batch Remove**;

2. Click on "**Download sample xlsx file**" to download the sample file;

3. Fill in the information in order;

   - Product: the product that the Super Admin has assigned to the member;

   - Email: email of the member that the Super Admin removes licenses;

4. Upload the file just filled out or the file that was prepared before;

5. Tap **Remove License** to complete the operation.

Note:

- These licenses removed in batch will be automatically returned to the original team.

Chapter 6 - Unbind Device

When a member changes his device and wants to activate the license code to the new device, the Super Admin or Team Admin can go to Unbind Device.

1. Go to **Unbind Device**;

2. Choose a member from the list, or quickly find a member by using the filter/search bar above;

3. Click **Unbind** on the right side.

4. The member can directly activate the license on a new device now.

Chapter 7 - Settings

In the Settings module, you can change the login password for Admin Console.

1. Click **Setting** -> **Security**,

2. Here you should enter your original password, new password, and confirm password,

3. Click **Save** after setting.

Note: The login password refers to the Super Admin's or Team Admin's own console login password.

Contact Us

Have any questions or need technical support for Admin Console? Feel free to contact us.

Our personalised customer service manager will be at your disposal.

E-mail: support@pdfraderpro.com

Website: https://www.pdfreaderpro.com

Volume Licensing: https://www.pdfreaderpro.com/vpp-purchase-program