



ProjectWise Entitlement Management

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Advancing Infrastructure

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Agenda

- **ProjectWise Entitlement Management: SELECT Server and SES**
 - *What is SES and how does it work with ProjectWise*
 - *ProjectWise Admin Datasource Entitlement Management*
 - *Demo: How to manage ProjectWise Entitlements in the SES Entitlement Management portal*
- **Entitlement Types: Passport vs PWDI Visa vs PW365 Visa**
 - *ProjectWise Entitlement Matrix*
 - *Demo: Subscription Analytics*
- **ProjectWise365 Entitlement Management**

SELECT Server and Subscription Entitlement Service

What is SES



The Subscription Entitlement Service (SES) is the latest Bentley licensing system, replacing the legacy SELECT server application.



The Subscription Entitlement Service is Bentley's new process for product activation



License alert notifications when you are approaching a custom usage threshold



Replacing site activation keys with user validation, enhancing security around your Bentley licenses and subscriptions



Subscription Analytics replaces SELECTserver Reports

Why SES

- Organizations need to control licensing costs. An organization needs to know who is using the software when they pay an invoice as well as have a way to provide Visas to a user on a given project.
- For organizations, SES for ProjectWise gives them greater insight into
 - Project costs – How is the software being used
 - Product authorization – How will users access content
 - User identities- Who am I paying for

What makes PWDI Visa Licensing Different

- PW Explorer determines user entitlement on datasource login, not application startup.
 - User Pays (Bring your own Visa)
 - Organization Pays (Owner agrees to pay for user)
 - Configured by the PW Admin for each user in every datasource

How ProjectWise Licensing works with SELECTserver



When the owner of the datasource pays, the configuration is such that the usage record is recorded on the PWDI Server and charged to the activation key on the PWDI Server.



When the user pays, the configuration is such that the usage record is recorded on the user's workstation and charged to the activation key on the user's workstation



Access vs Activation

Access versus Entitlement

Product Activation



Datasource Login

ProjectWise Explorer Datasource access

The image shows a screenshot of the 'Users Properties' dialog box in ProjectWise Explorer. The dialog has a title bar with a question mark and a close button. It features several tabs: 'Settings', 'Granular Security', 'Dynamic Creation', and 'Audit Trail'. The 'Settings' tab is active, showing 'Default user settings' with a tree view containing 'Working Directory', 'General', 'User Interface', 'Administrative', 'Licensing', and 'Network Transfer'. The 'Licensing' tab is selected and highlighted in blue. Below the tree view, there are two radio button options: 'Activate and record usage through connected Integrator' (unselected) and 'Activate and record usage through client's configured SE' (selected). A large green 'X' is drawn over the 'Licensing' section.

Users Properties

Settings Granular Security Dynamic Creation Audit Trail

Default user settings

- Working Directory
- General
- User Interface
- Administrative
- Show Access Control tab in preview pane
- Licensing**
 - Activate and record usage through connected Integrator
 - Activate and record usage through client's configured SE
- Network Transfer

Security

Type: Logical Federated Identity Logical Windows Windows - synchronized

Windows domain: [text box]

Verify password: [password box]

Account is disabled

DEMO: ProjectWise Entitlement Management

- Deny licenses
- Alerting service
- Entitlement Groups

ProjectWise Explorer 3.4

ProjectWise Explorer 3.4 with SES requires that all users have their own PWDI Visa entitlement.

Organizations cannot share their licenses with external parties

Users who need to purchase an annual license for PWDI Visa can now go through Virtuosity

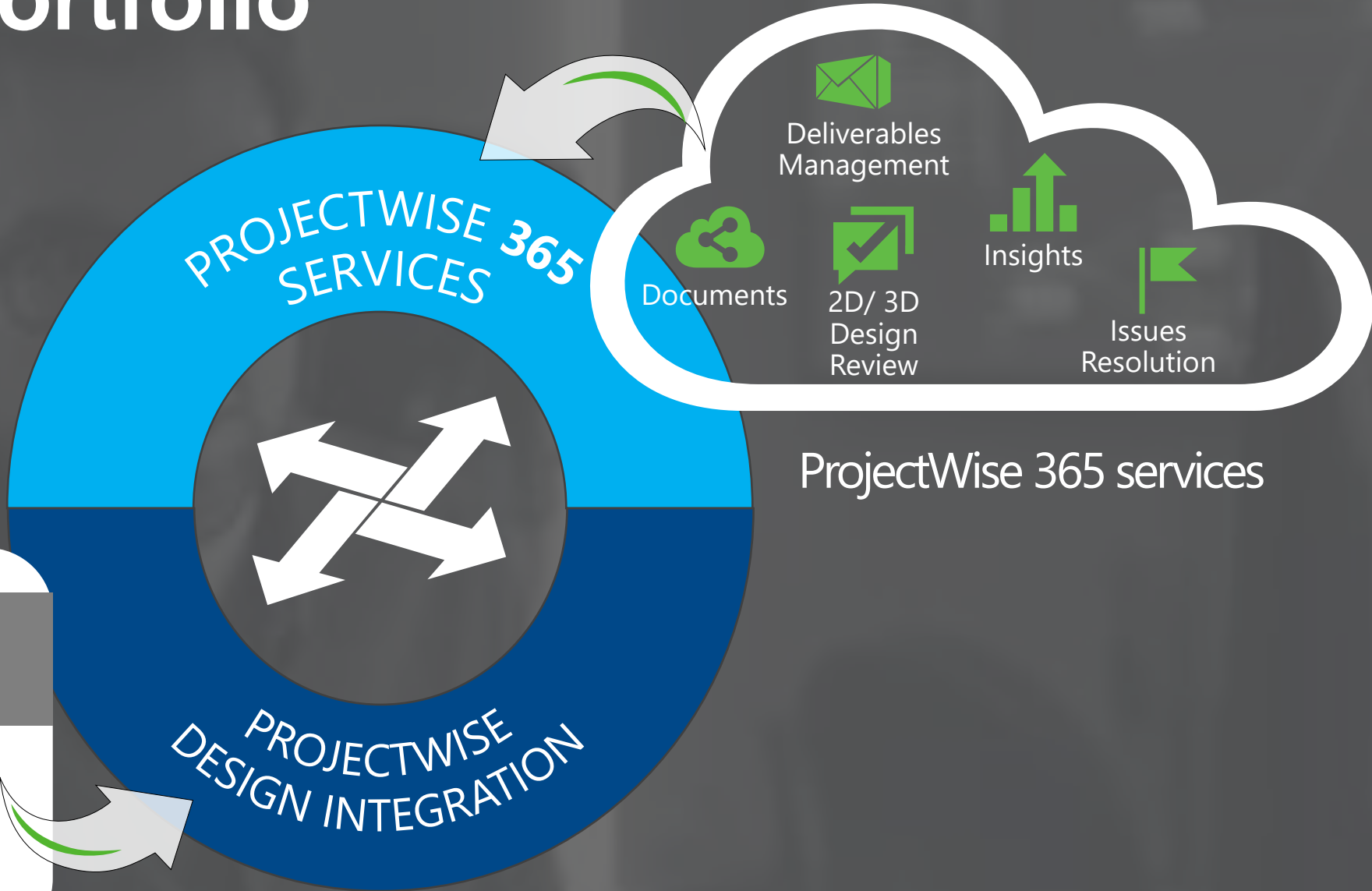
Once an SES version of PW Integration server is available, the functionality will return

Until then, users who will not BYO PWDI Visa should remain on PW Explorer 3.3 or earlier

Entitlement Types: PWDI Visa, PW365 Visa, Connections Passports



ProjectWise 365 with Design Integration| Product Portfolio



ProjectWise 365 services

Design Integration services



- Application Integration
- Workspace Management
- Reference File Management
- Automated Publishing

Capability Matrix by Entitlement

| Capabilities | ProjectWise 365 with Design Integration | | | |
|-------------------------------------------------------------------------------------------------------------|-----------------------------------------|----------|----------------------|-------------------------|
| | No Charge | Passport | ProjectWise 365 visa | Design Integration visa |
| Read only access to ProjectWise content -- ProjectWise Web View | X | X | X | X |
| Mobile applications (includes Navigator desktop) -- Navigator | | X | X | X |
| Desktop publishing (InterPlot standalone) -- InterPlot Organizer | | X | X | X |
| Store, share, find, markup documents with version control, attribution and audit trail -- PW365 | | | X | X |
| Manage transmittals, RFI and general correspondence -- PW365 Deliverables Management | | | X | X |
| Create and manage issues and forms-based workflows -- PW365 Issues Resolution Service | | | X | X |
| Access Design Integration content from a browser -- PW365 Web Connections | | | X | X |
| Manage digital content from 3 rd party systems including Revit and AutoCAD -- PDF Markup | | | X | X |
| Realtime Design Review (2D/3D) with comment, markups, and issues tracking -- Ad Hoc Design Review | | | X | X |
| Understand project and portfolio insights -- Project Insights / Portfolio Insights | | | X | X |
| Design integration services (automated publishing, PAS-1192, ISO-19650, BAS) -- ProjectWise Explorer | | | | X |

ProjectWise Servers – non-billable usage



ProjectWise Integration Server



ProjectWise Caching Server



ProjectWise Web Services Gateway (WSG) with the PWDI Plugin



iCS for PDF



Bentley Automation Server (BAS)

ProjectWise Licensing



Reviewer

- Requirement:
 - Download
 - Print
- Read only access

**ProjectWise Web View
(Included)**



Contributor

- Upload
- Design Review
- Content access
- ProjectWise Drive

**ProjectWise365 Web
Connections
(ProjectWise 365 Visa)**



Designer

- PW iDesktop Application Integration
- Datasource Administration

**ProjectWise Explorer
(PWDI Visa)**

DEMO: Subscription Analytics

- Visa Usage
- Version Usage
- Daily Usage by User
- Submit an Idea

Scenarios

What is the recommended configuration when all ProjectWise users are from the same organization?

When all users are from the same organization, then server-based usage logging is recommended.

(The default user setting is server-based usage tracking so no changes are needed for the initial setup.)

Internal to Org



- Action:
 - PWDI Visa Authorization via the IMS user in the CONNECTION Client.
 - User Accesses PWDI datasource using Logical, Windows, or IMS authentication
- Result:
 - PWDI Visa entitlement check and usage logging belongs to IMS profile in CONNECTION Client.
 - Access to datasource validated at PW login.
- Example
 - Jacobs Employee connecting to a Jacobs datasource where Jacobs pays

What is the recommended configuration when each company is paying themselves?

All users in the datasource should be set to activate and record usage via clients-based usage reporting (setting is called “activate and record usage through client’s configured SELECTserver”). This ensures that each user’s usage is logged to the activation key configured on the user’s workstation.

Bring Your Own PWDI Visa

- Action:
 - PWDI Visa Authorization via the IMS user in the CONNECTION Client.
 - User Accesses PWDI datasource using Logical, Windows, or IMS authentication
- Result:
 - PWDI Visa entitlement check and usage logging belongs to IMS profile in CONNECTION Client.
 - Access to datasource validated at PW login.
 - PWDI Visa entitlement comes from IMS user's ultimate, not PWDI datasource owner
- Example
 - Mott Employee connecting to Jacobs Datasource, Mott pays



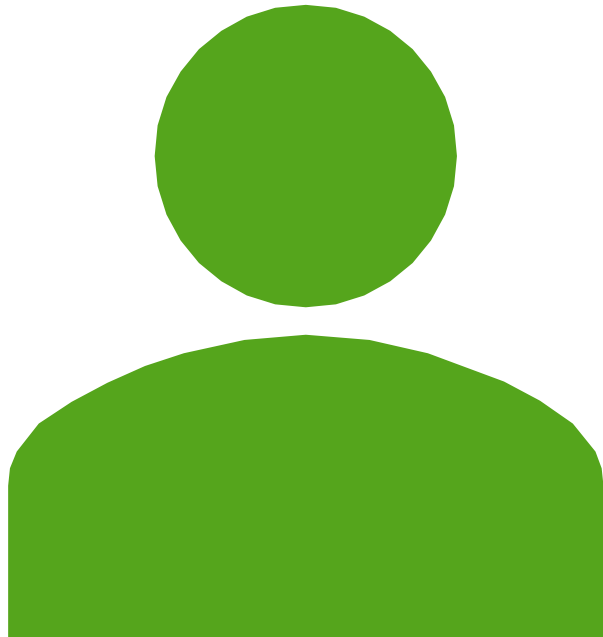
What is the recommended configuration when some companies are paying themselves, and one company is paying for their users and additional external users?

The users that the datasource owner wants to pay for should be configured with “Server-based” licensing, where the usage is recorded through a connected Integration Server. The users that the datasource owner does not want to pay for should be configured with the user setting to record usage through client’s configured SELECTserver.

Datasource Owner Pays

- Action:
 - User access PWDI datasource via IMS Auth
- Result:
 - Usage is charged to org owning DS
- Example
 - Jacobs pays for Alpo Engineering where Alpo Eng does not have an agreement with Bentley
 - Jacobs pays for all usage regardless if user has Visa entitlement





PW Web Only

- Action:
 - User has PWDI Visa Entitlement but for this datasource, the admin is only giving them PW Web access.
- Result: User access to PWDI datasource via PW Web only. Access to a datasource via PW Explorer is denied.

PW365 Cloud Services License Usages

PW Cloud Services log feature and usage via a cloud based SES entitlement service

All PW365 services bill usage to the IMS user's organization.

If the IMS user is unknown, the Project owner pays



