



Self-Service Portal

User guide

September 2021



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I. Terms used

Organisation — A customer account with Self Service Portal functionality switched on is referred to as an organisation. One account can have only one organisation. There are three user roles within an organisation.

Administrator — The user who has the rights to purchase and operate with licenses and cloud credits. At the moment, there can be only one administrator per SSP organisation. An administrator is able to:

- create an organisational structure with one Administrator and many Members or Guests (more information below)
- add/remove Members or Guests
- assign/revoke/reassign licenses to/from Members or Guests
- enable/disable users unlimited access to the organizational cloud credit pool
- set/edit/disable cloud credit quotas to Members or Guests

Member — The Administrator can add users with Member roles. This role is ideal for companies that don't want their employees to use their corporate email addresses to make Chaos product purchases. Members can only use licenses or cloud credits **allocated by the Administrator**. Once added to the Organization, Members **cannot place orders through the Chaosgroup online store or reseller by using their corporate email. Members are able to apply for trial and beta products** (note that trial/beta licenses cannot be revoked by the Administrator and re-assigned to another Member).

Guest — The Administrator can add users with Guest roles. This role can be used for students with previously purchased personal EDU licenses or freelancers. **Guests can have personal licenses** and use those as well as any provided by the organisation simultaneously, for example, a personal V-Ray for Rhino license as well as an organisational V-Ray for 3ds Max one. For Chaos Cloud Credits, Guests can consume from **only one pool at a time** - access to the organisational **Chaos Cloud Credits** can be enabled only if a Guest does not have active (vs expired/consumed) personal credits and vice versa. Guests can be added to an Organization even if they already have personal licenses, cloud credits, beta or trial products. Guests are able to:

- Use both assigned organizational and personal licenses
- Use personal Chaos Cloud Credits
- Use organizational Chaos Cloud Credits if they have no active personal Chaos Cloud Credits
- Purchase licenses for personal use while part of the organization
- Purchase Chaos Cloud Credits for personal use if no organizational credits are assigned
- Apply and use beta and trial products and Chaos Cloud Credits if no organizational ones are already allocated to them

Cloud Credits pool — Also called an organizational pool. On each purchase of Cloud credits that the Administrator has made, the credits are added to the organizational pool. The pool shows the available organizational credits.

Cloud Credit quota — A mechanism for Administrators to control the consumption of Chaos Cloud credits. The quantity of Cloud credits assigned with a quota is not explicitly dedicated to any Member or Guest. If the organizational pool is exhausted or has less credits than the assigned quota, users will not be able to consume their allocated quota entirely.

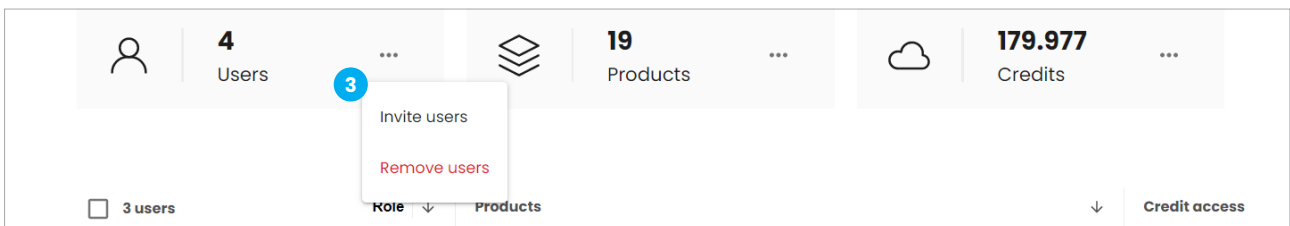
II. Organisational setup

1. To set up an SSP organisation, the customer must appoint a company account Administrator and provide their customer number . The administrator can find the customer number by logging into <https://my.chaosgroup.com> and navigating to the “**Account**” tab..
2. After confirmation, the Administrator of the company account will be set up and they can log into <https://my.chaosgroup.com> and navigate to the “**Organization**” tab



III. User management (Administrator)

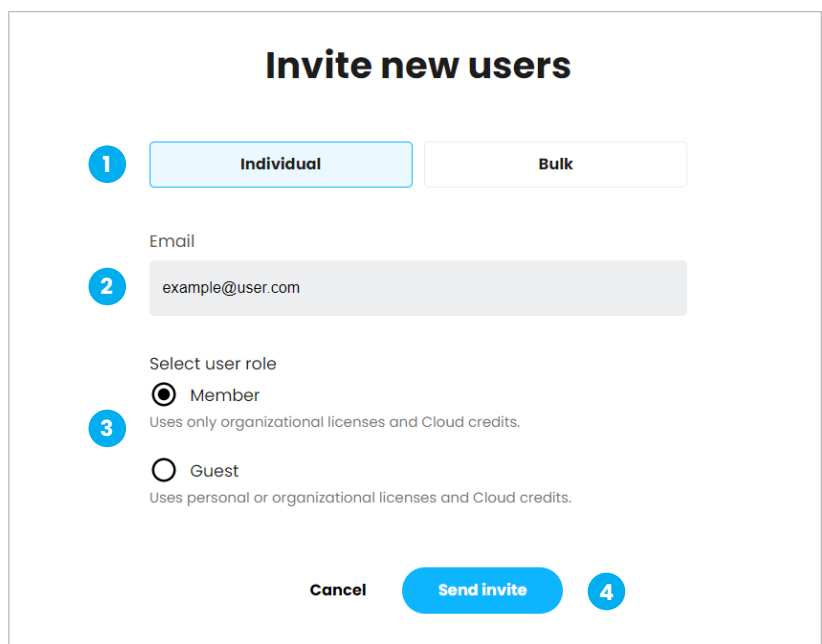
The Administrator can start adding users to their organisation by selecting the ellipsis menu on the “**Users**” tile and clicking “**Invite users**”.



IV. Invite users individually (Administrator)

1. Select “**Individual**”
2. Enter the user email address
3. Select the user role
4. Select “**Send Invite**”

NB: Only users with registered Chaos Group accounts can be added.



If there is no account attached to the entered email address, Administrator will see the following error:

**User with email "example@user.com" does not exist
item does not exist**

- Once the invitation is sent, the user receives an invitation to join the organization

Hello, example@user.com

example@user.com has invited you to join their organization as Guest.

As guest you'll be able to use Chaos products and services assigned to you from the organization as well as your personal licenses.

Use the button below to accept or decline the invitation.

Respond to invite 5

- After clicking the **"Respond to invite"** button in the email, the user will be redirected to sign-in with their credentials to my.chaosgroup
- After signing in, a pop-up notification to accept or decline the invitation will appear for the user

Would you like to accept the invitation? **Decline** **Accept** 7

- The administrator will receive an email notification that the user has accepted the invitation

NB: Users must accept the invitation to join the organisation.

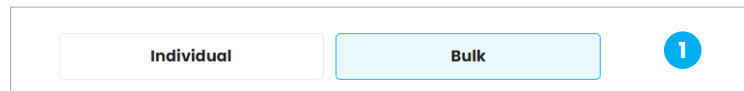
If the users don't open their email or decline the invitation, then they won't be added to the organisation even though they have been invited.

Users with personal purchases (trials/betas not considered as such) can only be added as Guests. Attempting to add one as a Member results in the following error message:

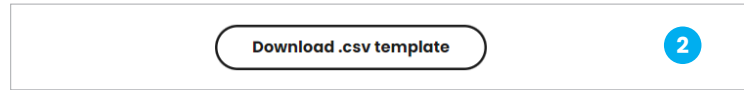
User has available personal subscriptions or is not eligible to join the organization as Member. You can only invite this user as a Guest

V. Bulk invite of users (Administrator)

1. Select “Bulk”



2. Download the .csv template



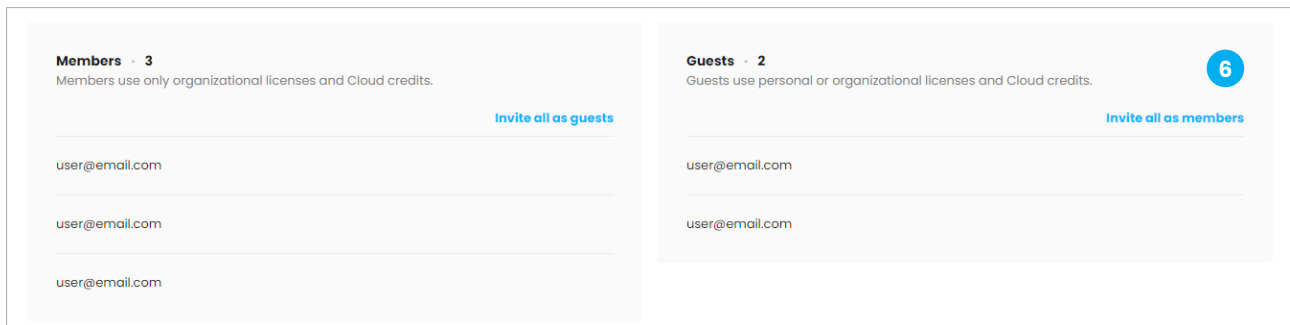
3. Fill in the required fields in the template – email and role of the users to be invited

	A	B
1	Email	Role
2	<i>example.member@org.com</i>	<i>member</i>
3	<i>example.guest@gmail.com</i>	<i>guest</i>

4. Save the .csv file and upload it

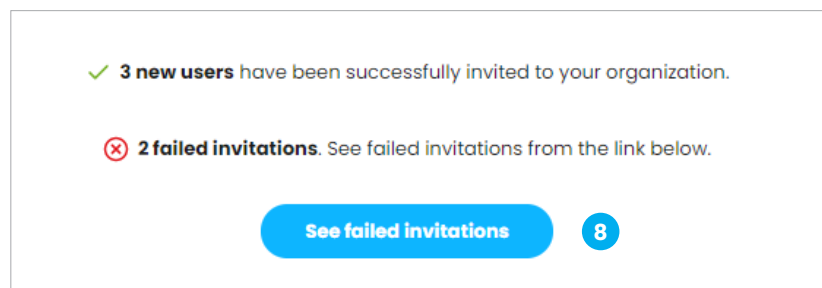
5. You will be presented with a screen to review the invitations

6. At this step you will be able to change the roles of the users and invite all of them either as guests or as members



7. After selecting “Send invites” you will be presented with a status screen

8. Select “See failed invitations” (if any)



9. You will be provided with information on why the invitations were not sent

10. In the case of failed invitations, the Administrator can Invite the user as guest or ask the user to register to chaosgroup.com

11. Once the invitations are sent, the users receive an email to join the organization

12. The Administrator will receive an email with a link, leading to the status of the invitations

NB: The condition stated before remains true: Only users with registered **Chaos Group accounts** can be added. Contact the people you want to add to your SSP organisation beforehand and ensure they **create a Chaos Group account** if they don't already have one.

VI. User removal (Administrator)

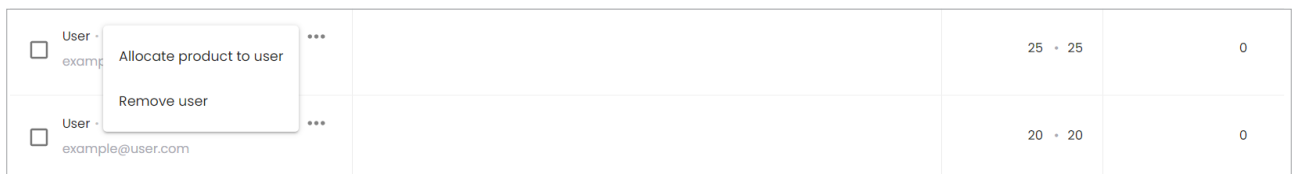
There are several possible ways to remove users from the organisation:

- **Individual removal**
- **Bulk removal**
 - From the main admin page
 - Manually from the “Users” tile
 - Via .csv file from the “Users” tile

NB: To remove a user, the Administrator must first revoke any licenses assigned to them. Cloud credit pool/quota access, however, will not prevent user removal.

VII. Individual removal (Administrator)

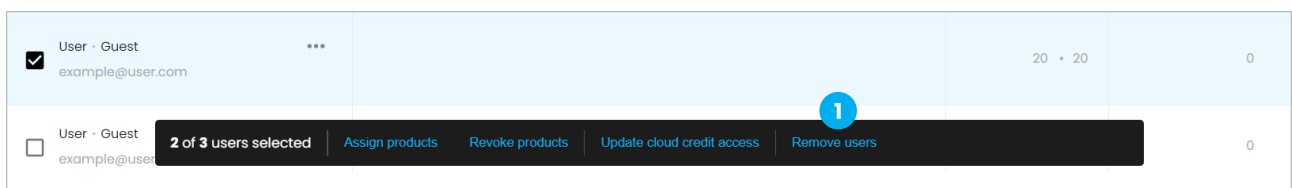
Select the ellipsis next to the Member or Guest you want to remove and click on “Remove user”.



<input type="checkbox"/>	User - example@user.com	...	25	25	0
<input type="checkbox"/>	User - example@user.com	...	20	20	0

VIII. Bulk removal of users from the main admin page (Administrator)

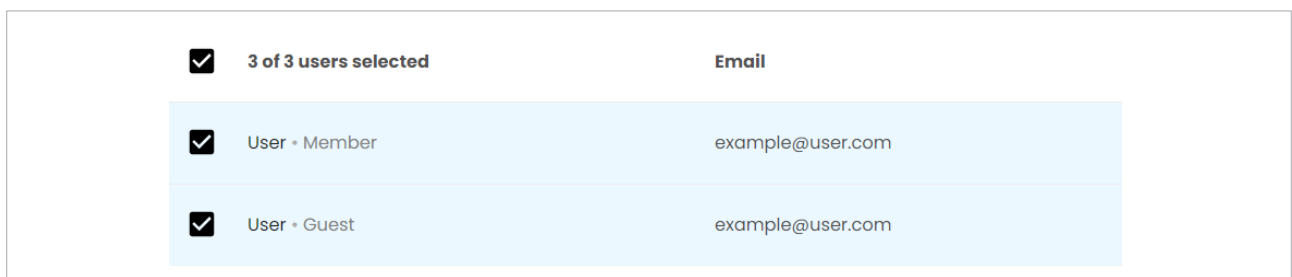
1. You can choose to remove multiple users by selecting the checkboxes next to their names and choosing “Remove users” from the menu at the bottom of the page



<input checked="" type="checkbox"/>	User - Guest example@user.com	...	20	20	0
<input type="checkbox"/>	User - Guest example@user.com	...			0

2 of 3 users selected | Assign products | Revoke products | Update cloud credit access | Remove users

2. You will be presented with a screen of the selected users, where you can edit the selection by using the checkboxes



<input checked="" type="checkbox"/>	3 of 3 users selected	Email
<input checked="" type="checkbox"/>	User • Member	example@user.com
<input checked="" type="checkbox"/>	User • Guest	example@user.com

- After selecting the **“Remove X users”** button the Administrator will be notified that X users will be removed. In order to successfully remove them, all their products must be removed and they should not have any borrowed licenses for offline use
- A notification of successful and/or failed user removals will appear

3 Remove users ✕

You are about to remove **3 users** from your organization.

In order to successfully remove all of the selected users make sure that all their products have been revoked or they don't have borrowed products. Users with borrowed products won't be removed from your organization until the borrowing period ends or they release the product.

Chaos Cloud Credits will be automatically disabled.

Are you sure you want to remove these users?

[Cancel](#) [Remove 3 users](#)

4 Not all users have been removed

1 user was successfully removed and is no longer able to use the assigned products and consume organizational cloud credits. ✓

1 failed user removal. See failed removals from the link ✕ below.

[Cancel](#) [See failed removals](#)

- Select the **“See failed removals”** (if any) button. You will be presented with the users who are not removed and the reason
- You can download a .csv file with the emails of the users that failed to be removed and the reason why. The information in the file then can be used to bulk revoke products for example
- All users who have been successfully removed from the organization will receive a notification email

5 Failed user removals

The users have assigned or borrowed product(s) and could not be removed currently. You should revoke all assigned products. For borrowed products you should wait until the borrowing period expires or contact the user to release the borrowed product.

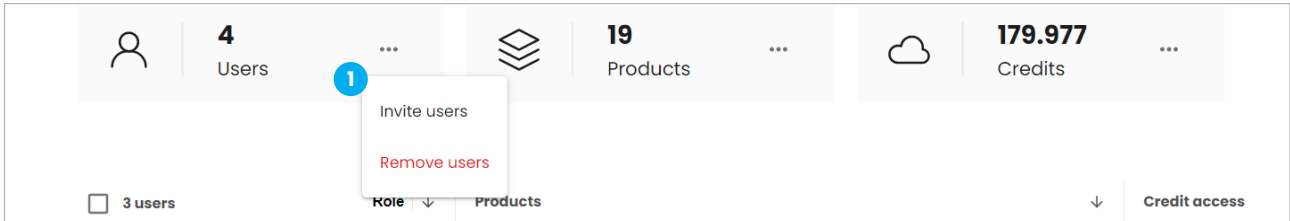
User	Email	
Asia 26 • Member	anastasiya.nikolova+26@chaosgroup.com	ⓘ Assigned product(s)

[Download CSV](#)

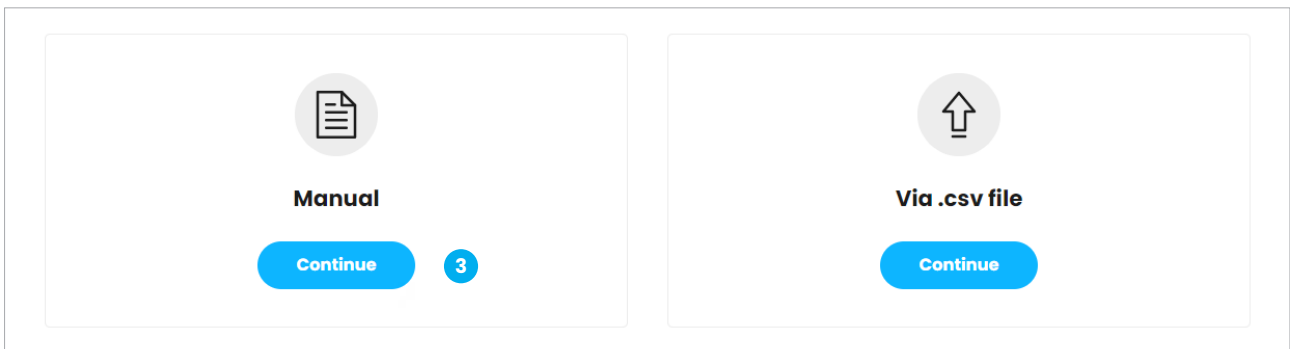
6 [Go back to organization](#)

IX. Manual bulk removal of users from the Users tile (Administrator)

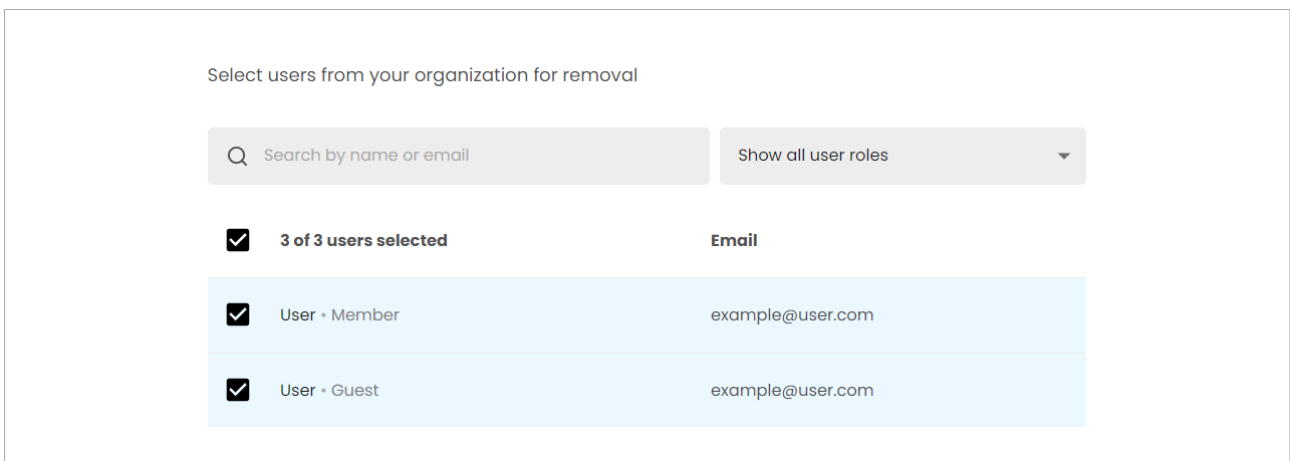
1. Select the ellipsis menu at the “Users” tile and then select “Remove users”



2. You will be presented with a screen to select **Manual** or **Via .csv** file removal of users
3. Select “Manual” and click “Continue”



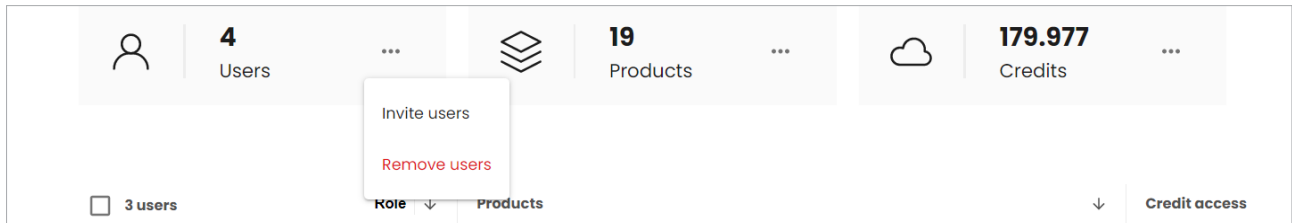
4. You will be presented with a list of all users added to the organization
5. Select the users to be removed by using the checkboxes next to their names and click on “Remove X users”



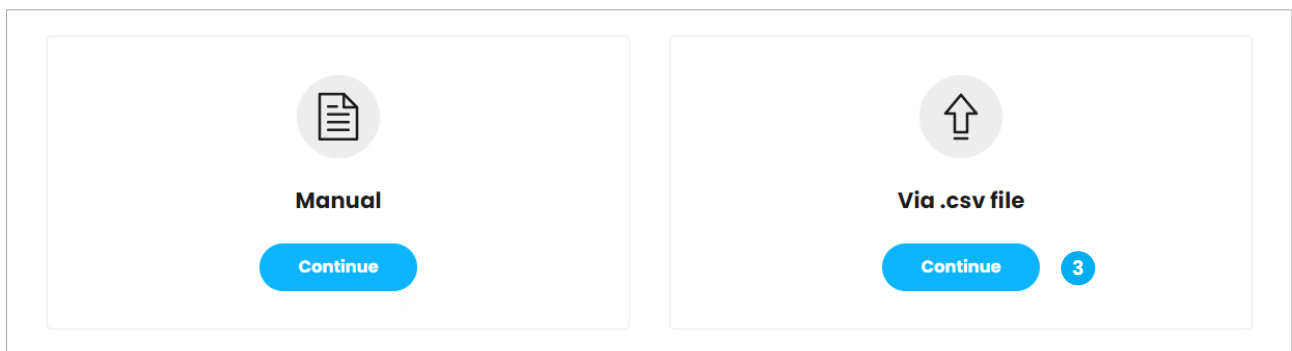
6. The process continues the same way as per [chapter VIII. Bulk removal of users from the main admin page](#)

X. Bulk removal of users via .csv file from the Users tile (Administrator)

1. Select the ellipsis menu at the “Users” tile and than select “Remove users”



2. You will be presented with a screen to select **Manual** or **Via .csv file** removal of users
3. Select “Via .csv file” and select “Continue”

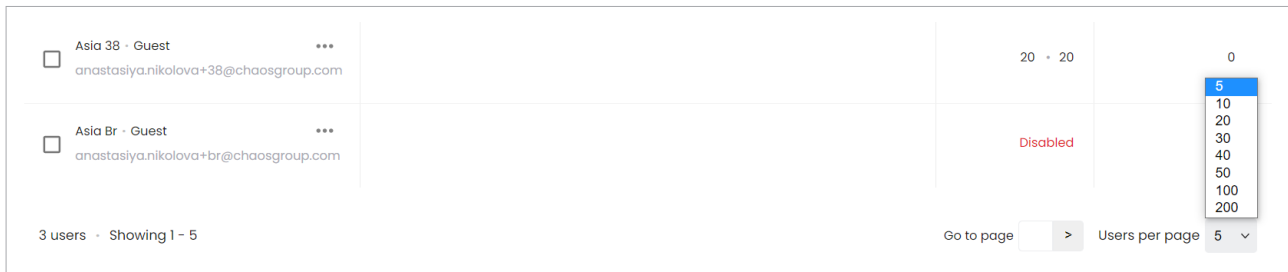


4. Download the .csv template
5. Fill in the required information in the .csv template file - the emails of the users to be removed from the organization
6. Save and upload the .csv file
7. Select the users to be removed by using the checkboxes next to their names and click on “Remove X users”
8. The process continues the same way as per chapter [VIII. Bulk removal of users from the main admin page](#)

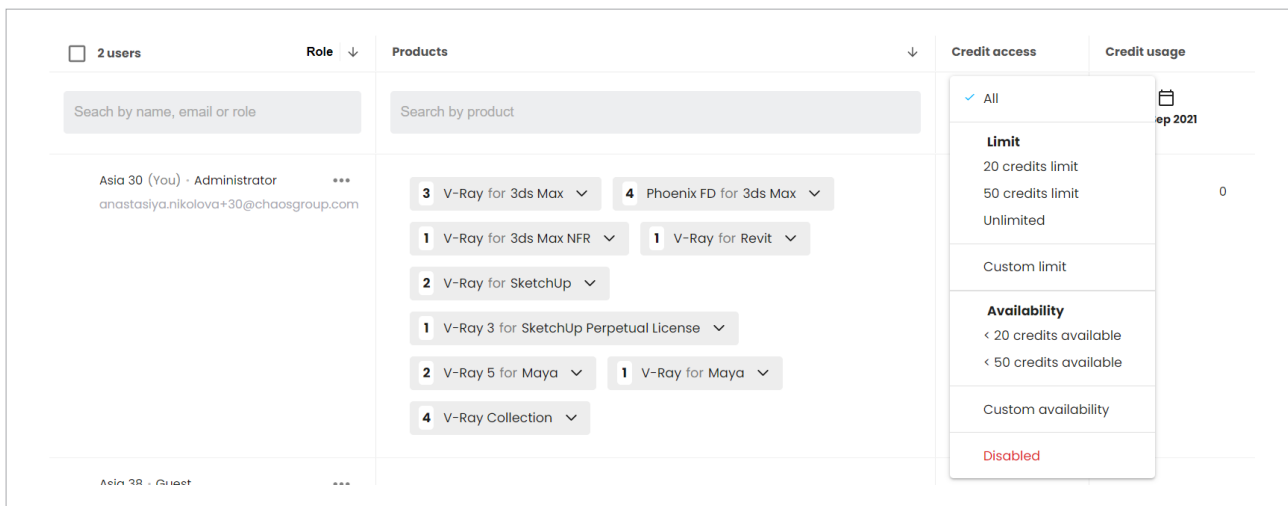
	A
1	Email
2	<i>example.member@org.com</i>
3	<i>example.guest@gmail.com</i>

XI. User search (Administrator)

Administrators can select the number of users to be displayed per page by selecting it from the drop down menu at the bottom of the user interface.



Administrators can use the search bar to find a specific Member or Guest by typing their email address or user name. They can also search the users by the products they have assigned to them or the Chaos cloud credit quota enabled.



XII. Product license assignment (Administrator)

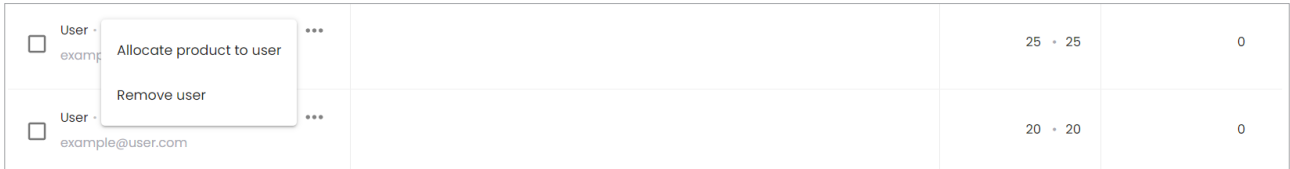
Once Members & Guests have been added to your organisation, the Administrator can allocate product licenses to them.

There are several possible ways to allocate products to users:

- **Individual removal**
- **Bulk removal**
 - From the main admin page
 - Manually from the "Products" tile
 - Via .csv file from the "Products" tile

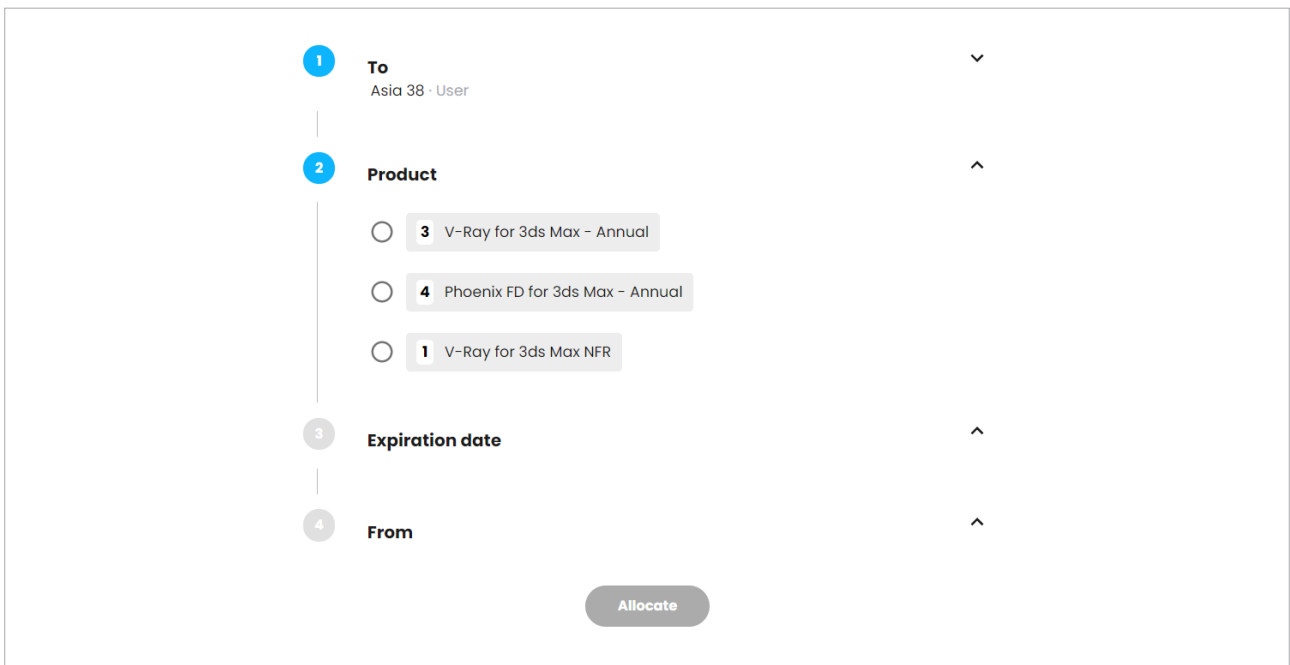
XIII. Individual product license assignment (Administrator)

1. Click on the ellipsis next to the username of the Member/Guest
2. Select “Allocate product to user”



<input type="checkbox"/> User - example	...	25	25	0
<input type="checkbox"/> User - example@user.com	...	20	20	0

3. A new screen will open



The screenshot shows a form with four numbered steps:

- 1 To**: Asia 38 - User
- 2 Product**: Three radio button options:
 - 3** V-Ray for 3ds Max - Annual
 - 4** Phoenix FD for 3ds Max - Annual
 - 1** V-Ray for 3ds Max NFR
- 3 Expiration date**
- 4 From**

An **Allocate** button is located at the bottom of the form.

4. The Admin will be able to choose the product they want to allocate, its expiration date, as well as the number of product licenses they want to assign to the selected user

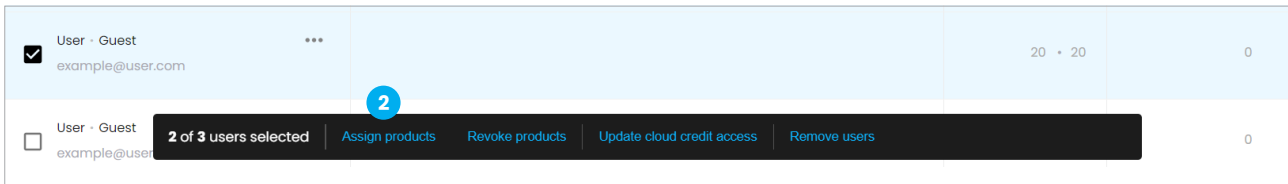
NB: If all organisational products are assigned to different Members/Guests, the Admin will have to choose ‘From’ which user to re-allocate a product license:

NB: Each time a product is assigned to a user, the user will receive a notification email.

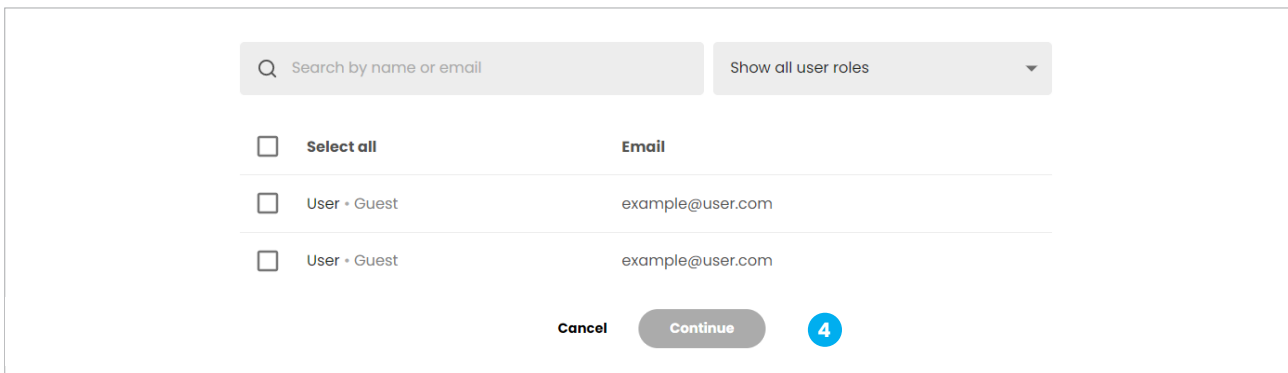
NB: Product licenses expiration date. If there are multiple purchases made over time for a specific product, e.g., V-Ray Collection -Annual, Admin can use the ‘Expiration date’ of different subscriptions to determine which product license they want to assign to a specific user:

XIV. Bulk product license assignment from the main admin page (Administrator)

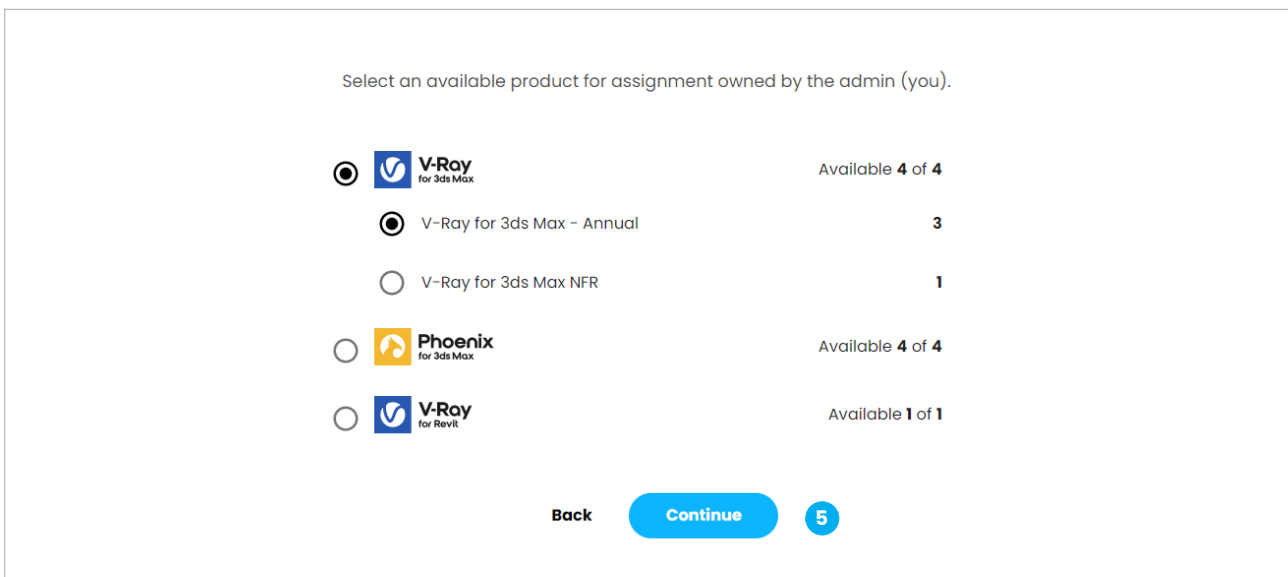
1. Select the users you want to assign licenses from the main page by using the checkboxes next to their names
2. Choose the “Assign products” option from the menu at the bottom of the page



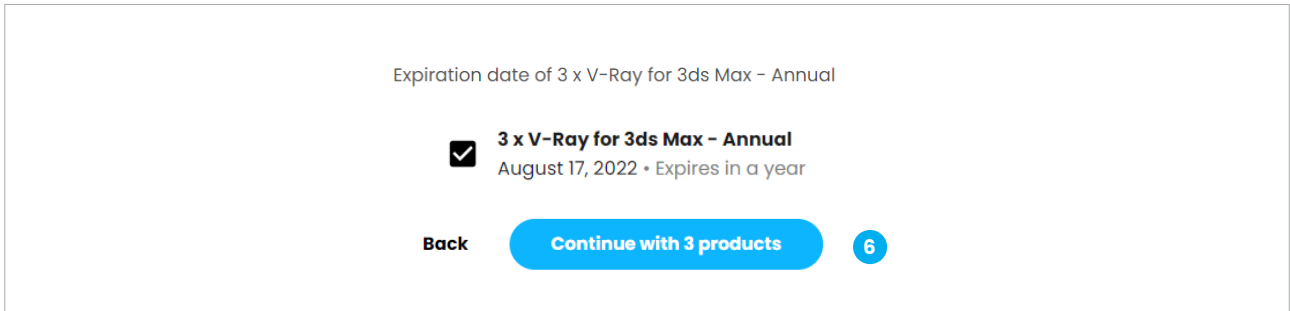
3. You will be presented with an editable list of the preselected users that you’d like to assign licenses to
4. Select the “Continue with X users” button



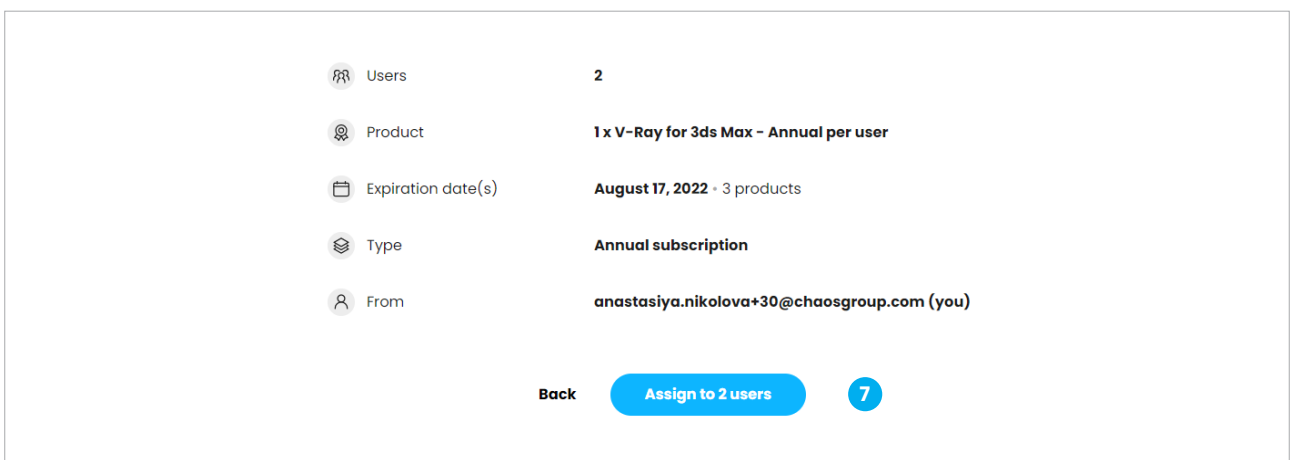
5. Selects the products to be assigned to the chosen users and click on “Continue”



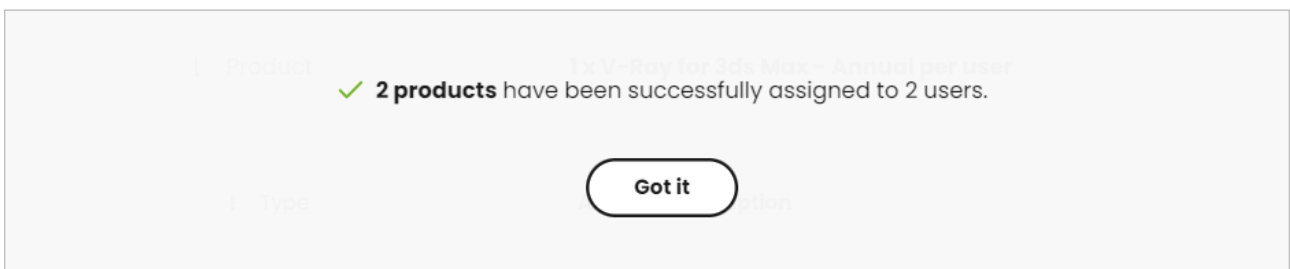
6. Select the expiration date of the product and click **“Continue with X products”**



7. You will be presented with a summary of the bulk assign, selects **“Assign to X users”**



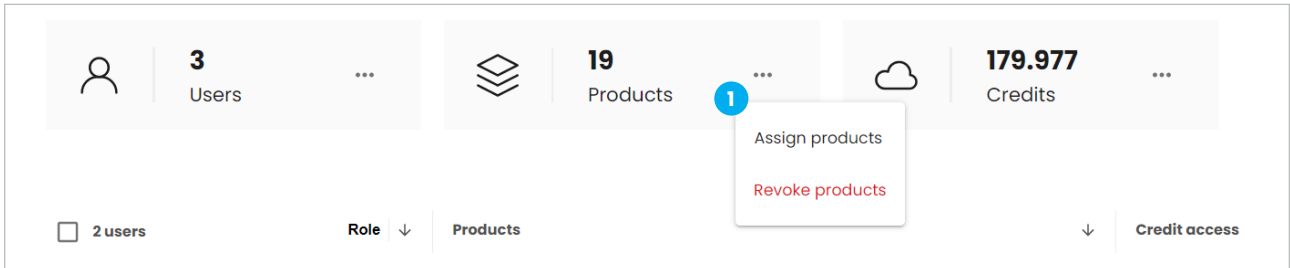
8. A notification of the process finalization is presented



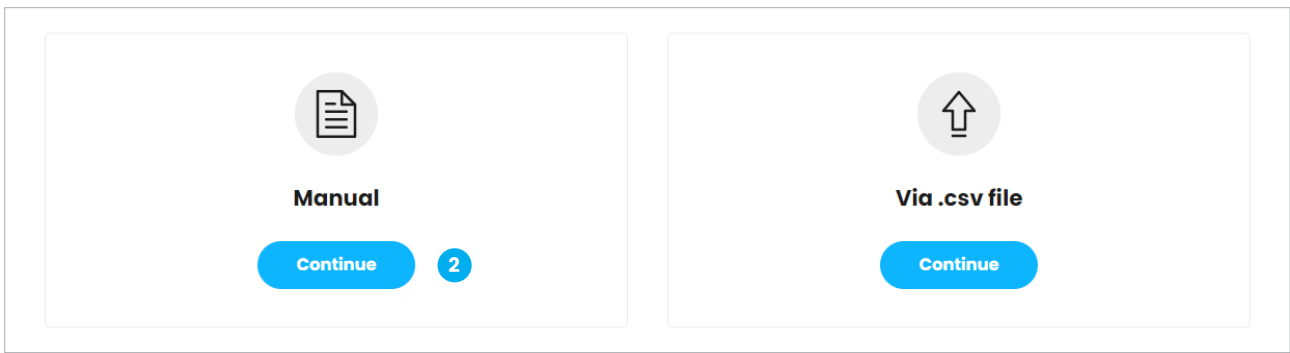
9. Each of the users will receive a notification email that a license has been assigned to them from the administrator of the organization.

XV. Manual bulk product assignment from the “Products” tile (Administrator)

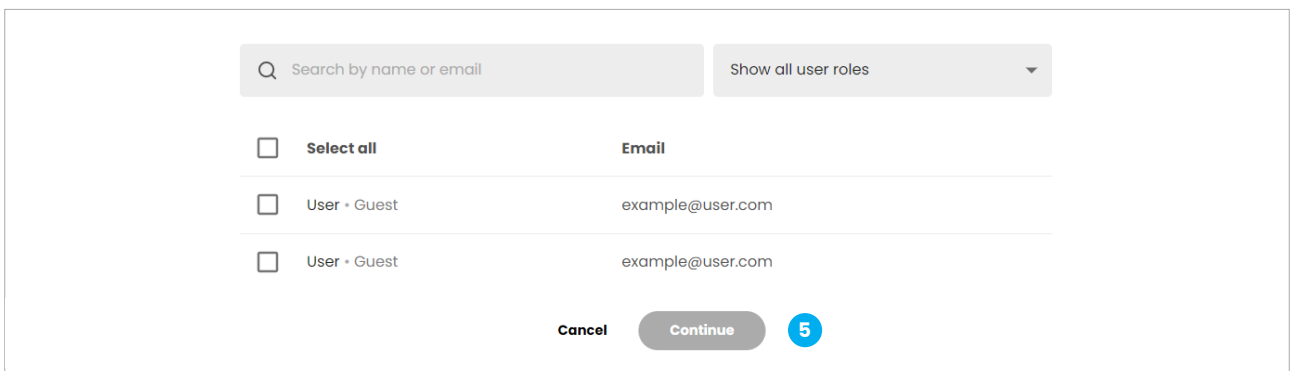
1. Select the ellipsis menu on the “Products” tile and click “Assign products”



2. Select “Manual” product assignment and click “Continue”



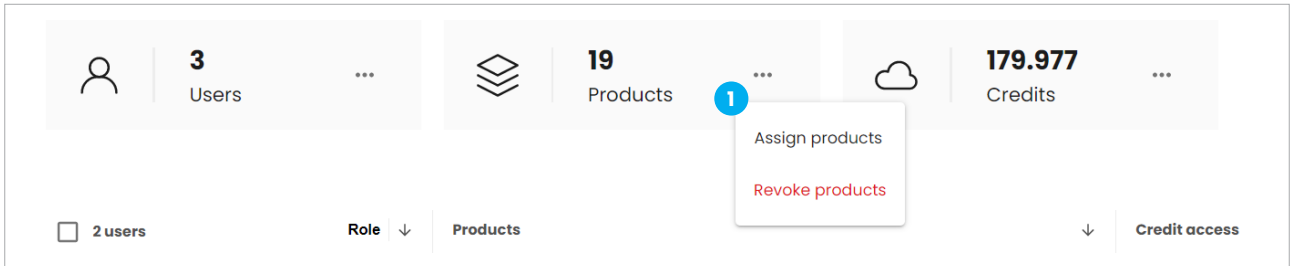
3. You will be presented with a list of all users within the organization
4. You can select which of them will be assigned a product license by using the checkboxes next to the user names
5. Click on “Continue with X users”



6. The process continues the same way as per chapter [XIV. Bulk product license assignment from the main admin page](#)

XVI. Bulk product assignment via .csv file from the “Products” tile (Administrator)

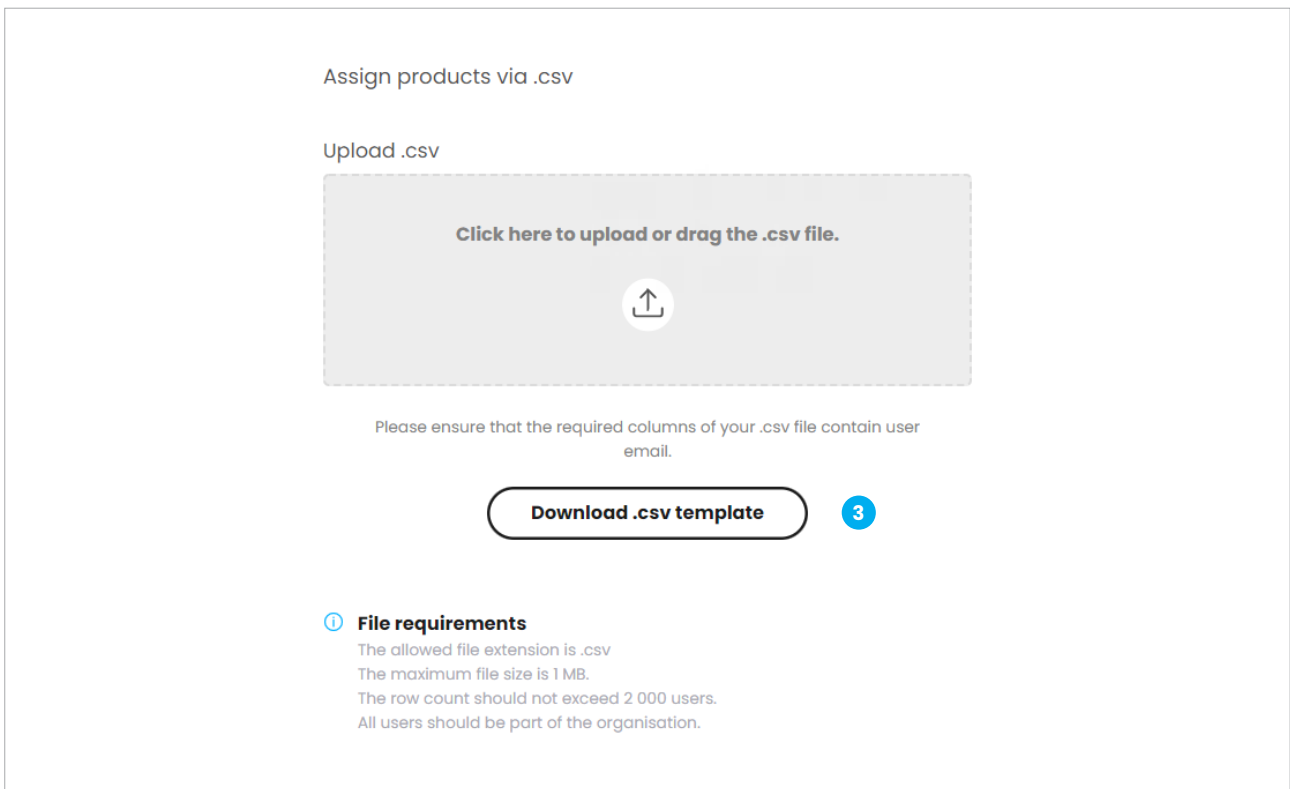
1. Select the ellipsis menu on the “Products” tile and click “Assign products”



2. Select “Via .csv file” product assignment and click “Continue”



3. Downloads the .csv template file



4. Fill in the required information - the email addresses of the users to be assigned with products licenses

	A
1	Email
2	<i>example.member@org.com</i>
3	<i>example.guest@gmail.com</i>

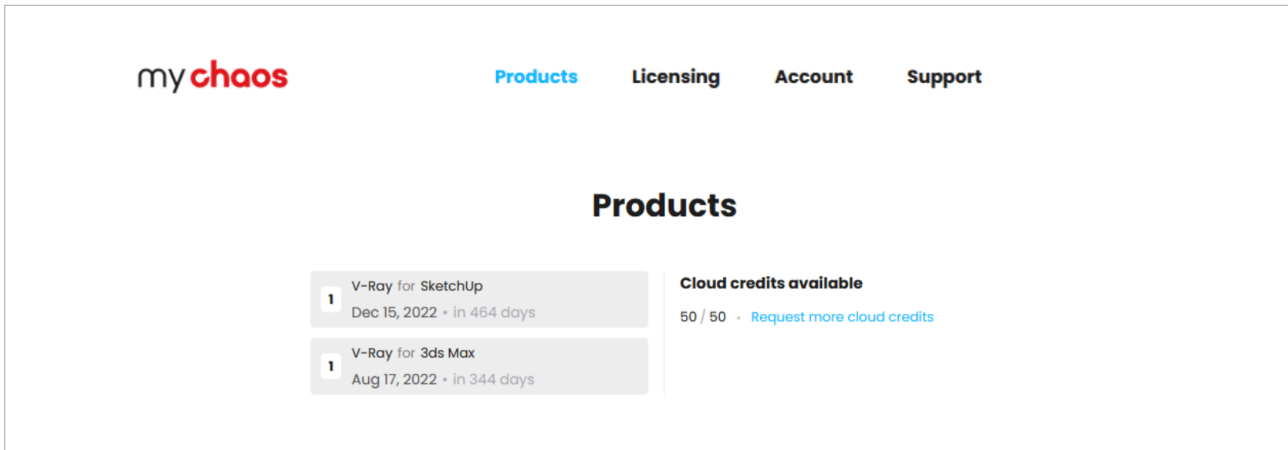
5. Save and upload the .csv file
6. You will be presented with a list of the uploaded users
7. You can edit the list by using the checkboxes next to the names of the users and than select **“Continue with X users”**

The screenshot shows a user selection interface. At the top, there is a search bar with the placeholder text "Search by name or email" and a dropdown menu labeled "Show all user roles". Below this, there is a list of users. Each user entry consists of a checkbox, a name, and an email address. The first entry is "Select all" with the email "Email". The second and third entries are "User - Guest" with the email "example@user.com". At the bottom of the list, there are two buttons: "Cancel" and "Continue".

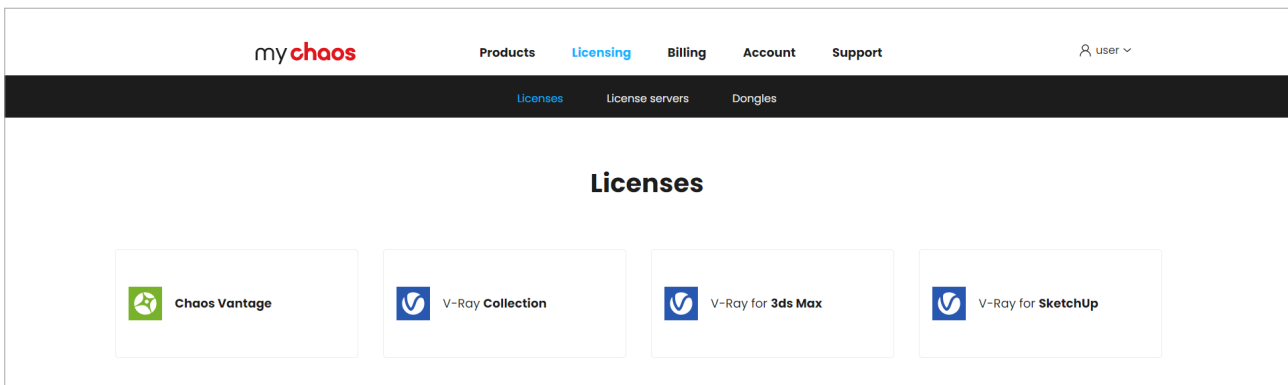
8. The process continues the same way as per chapter [XIV. Bulk product license assignment from the main admin page](#)

XVII. User visibility: Member view – mychaosgroup.com

When the Administrator assigns product licenses to Members, this is what they see in mychaosgroup.com under the “**Products**” tab:



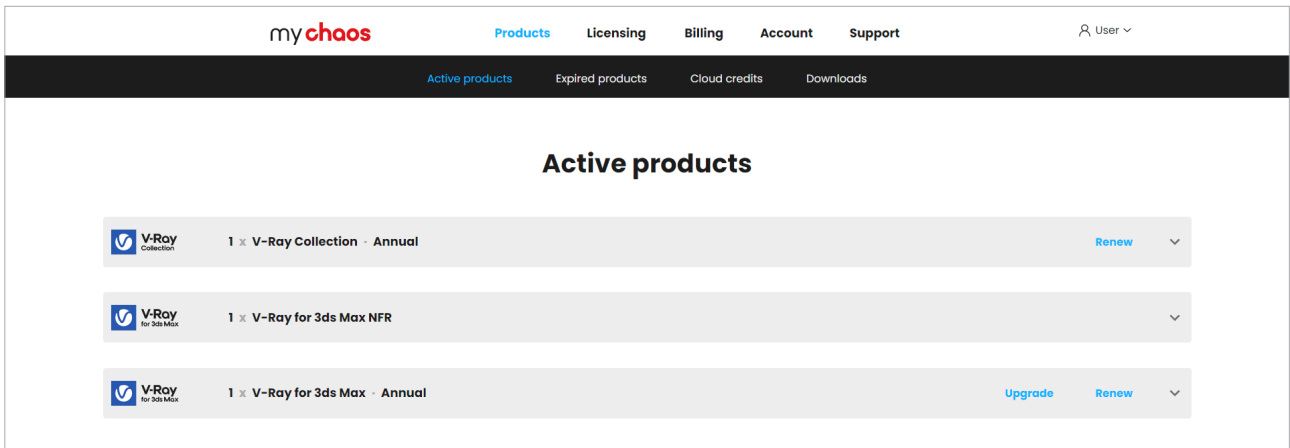
and respectively under “**Licenses**” in the “**Licensing**” tab:



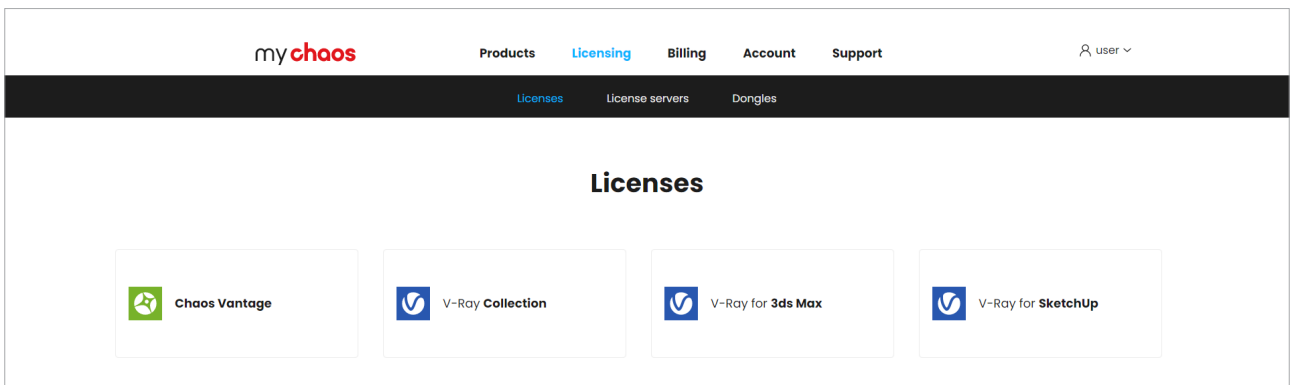
NB: Under the “**Products**” tab, Members can identify their Company account administrator and get in touch with them to request additional product licenses and cloud credits.

XVIII. User visibility: Guest view - mychaosgroup.com

Since they retain the right to make personal purchases, Guests have a different view in mychaosgroup.com. They will see any personal products under the “Active Products” tab with the ability to renew and/or upgrade them:



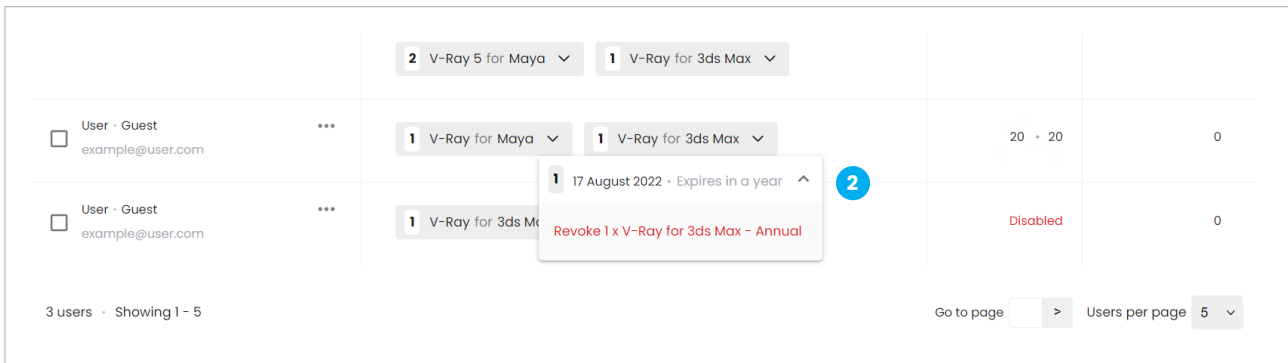
Their personal licenses will be visible under “Licenses” in the “Licensing” tab alongside any licenses assigned by the organisation:



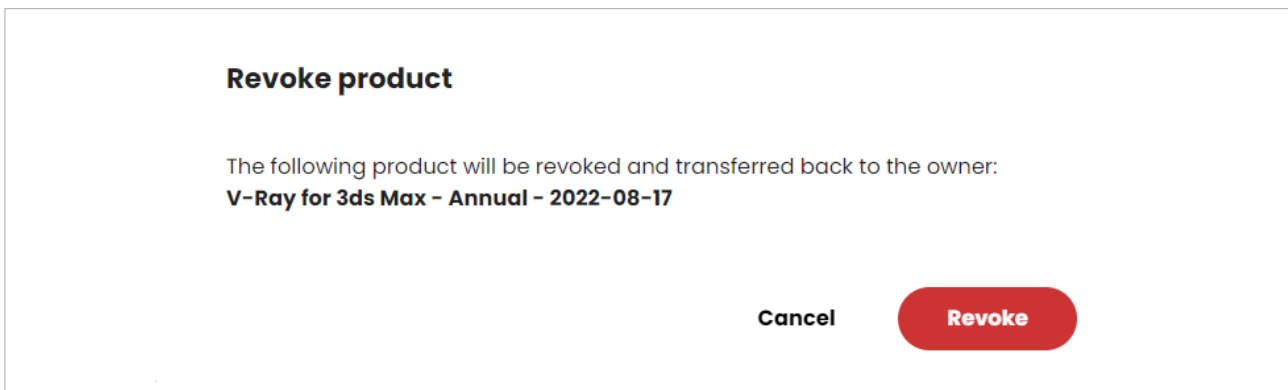
XIX. Individual product license revoke (Administrator)

In order to revoke a product license, the Administrator must first determine which user they want to remove a license from and then select the product to be revoked.

1. Select the product to be revoked from a certain user
2. Click on the product and select **“Revoke product”**



3. Upon clicking on **“Revoke Product”** the Administrator will see the following message:

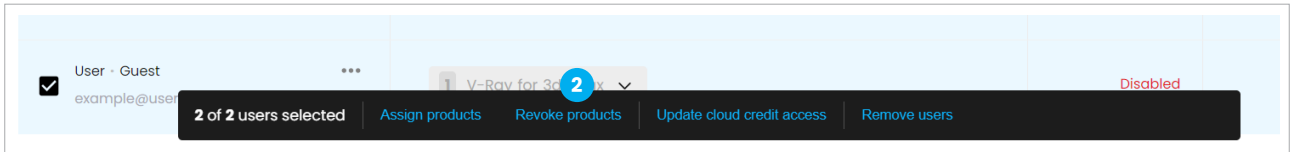


NB: If two or more identical Products have been assigned to a user, e.g., two V-Ray for 3ds Max - Annual, those can only be revoked altogether by the Admin instead of one at a time.

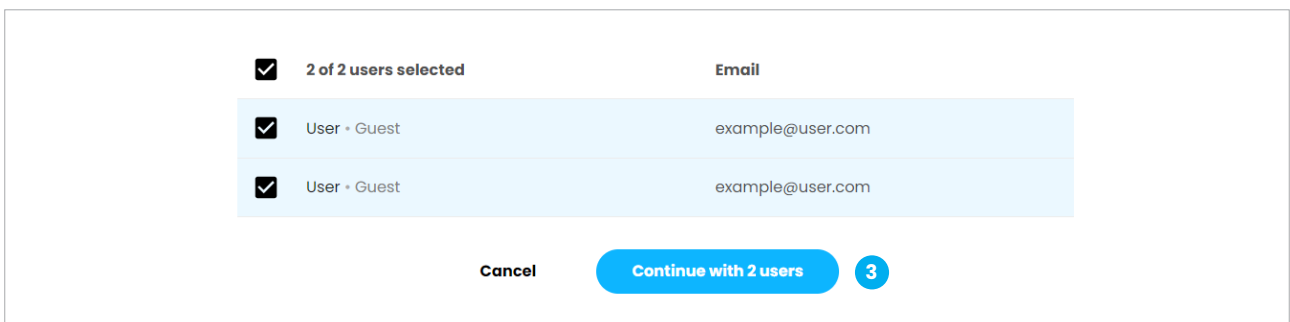
NB: Each time a product is revoked from a user, the user will receive a notification email.

XX. Bulk product license revoke from the main admin page (Administrator)

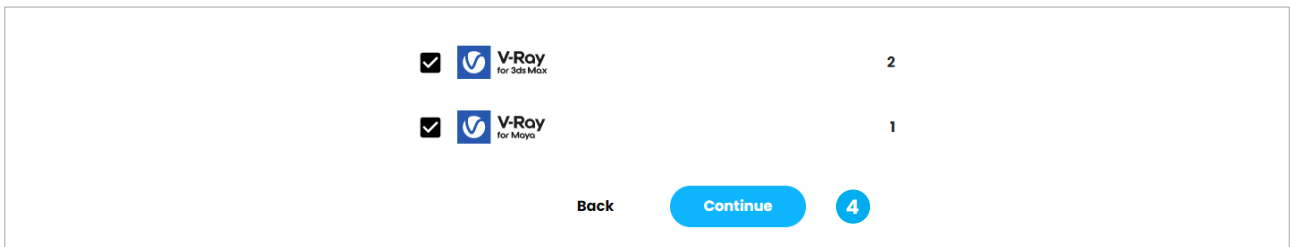
1. Select the users to revoke products from by using the checkboxes next to their names
2. Select the **“Revoke products”** option from the menu at the bottom of the screen



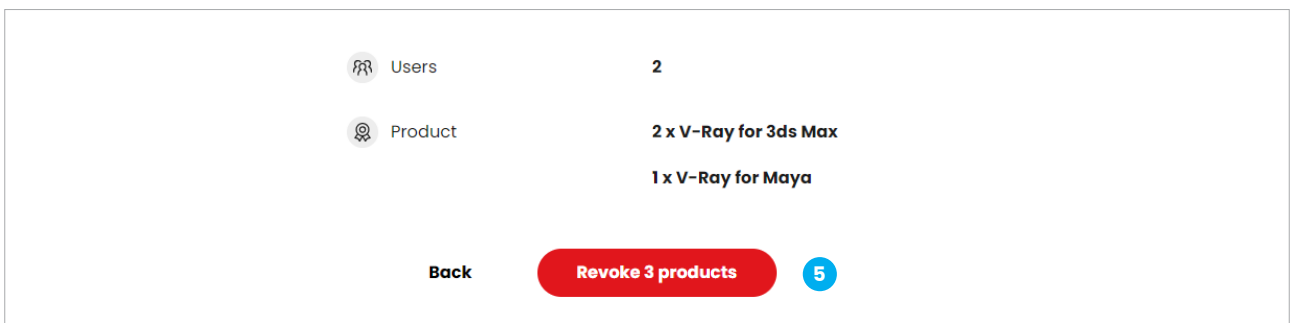
3. You will be presented with a screen with the preselected users, click on **“Continue with X users”**



4. Select the products to be revoked from these users and click on **“Continue”**



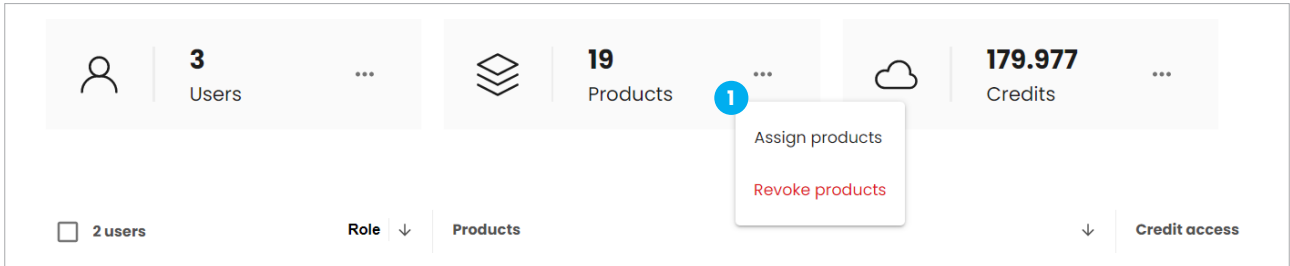
5. You will be presented with a summary of the products to be revoked, select **“Revoke X products”**



6. The products are being revoked — users will receive email notification

XXI. Manual bulk product license revoke from the “Products” tile (Administrator)

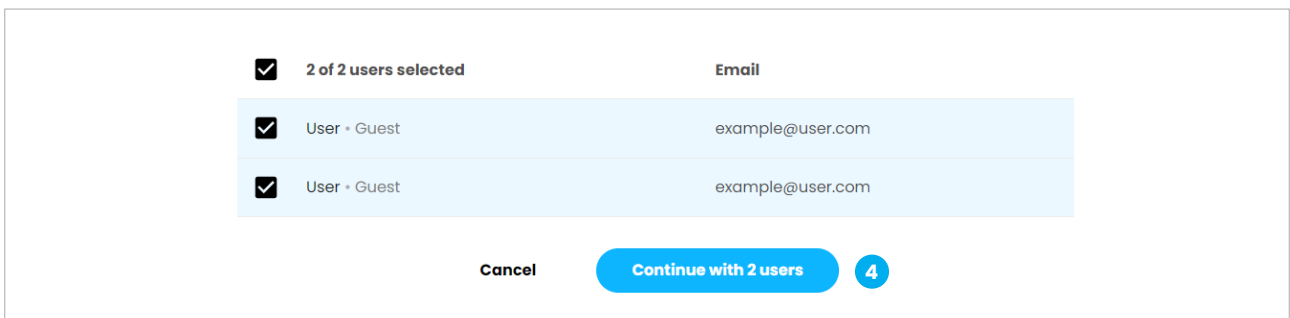
1. Navigate to the ellipsis menu on the Products tile and select “**Revoke products**”



2. Select “**Manual**” and click “**Continue**”



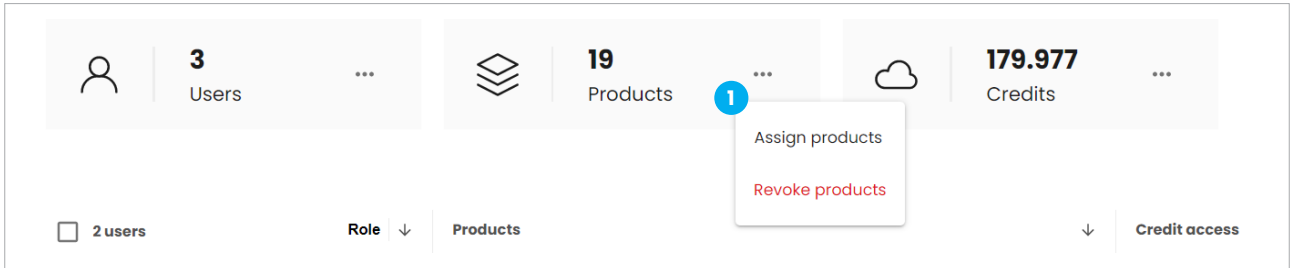
3. You will be presented with a list of all users within the organization
4. Select the users you would like to revoke products from and click on “**Continue with X users**”



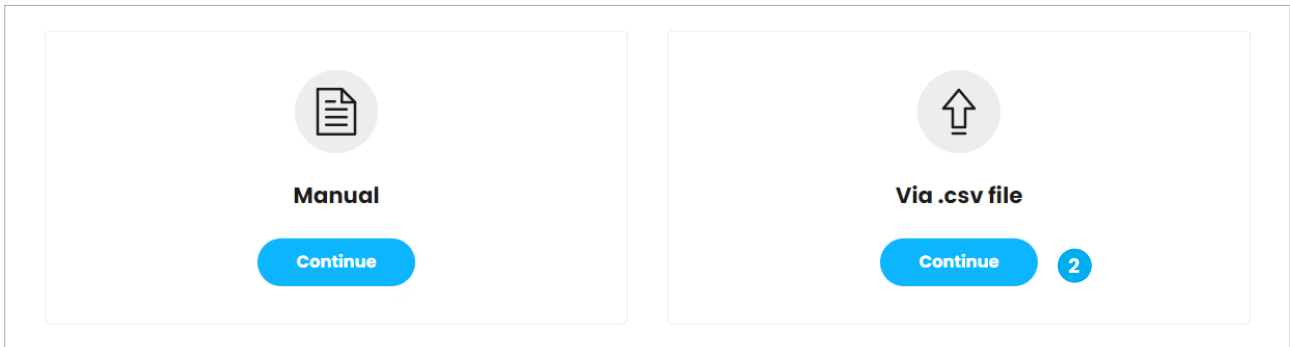
5. The process continues the same way as per chapter [XX. Bulk product license revoke from the main admin page \(Administrator\)](#)

XXII. Bulk product license revoke via .csv file from the “Products” tile (Administrator)

1. Navigate to the ellipsis menu on the **Products** tile and select “**Revoke products**”

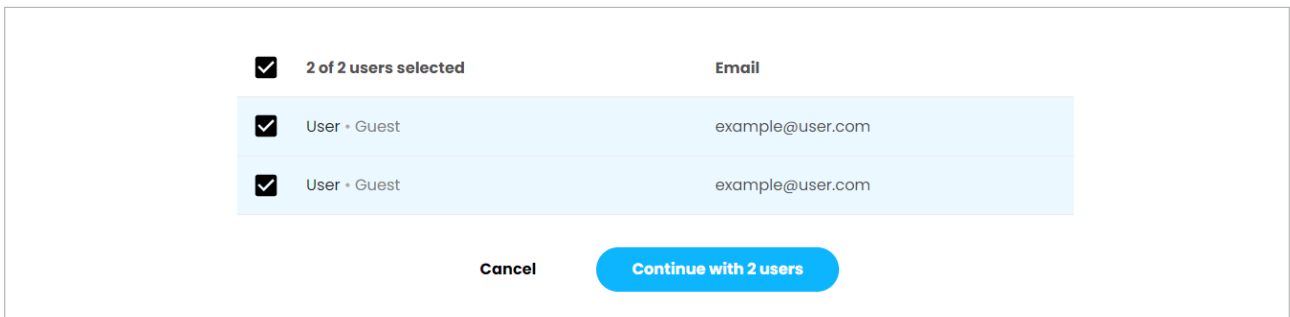


2. Select “**Via .csv file**” and click “**Continue**”



3. Download the .csv file template
4. Fill in the required information - emails of the users from whom the licenses will be revoked
5. Save the file and upload it
6. You will be presented with the list of users which can be edited by using the checkboxes next to their names. Select “**Continue with X users**”

	A
1	Email
2	<i>example.member@org.com</i>
3	<i>example.guest@gmail.com</i>



7. The process continues the same way as per chapter [XX. Bulk product license revoke from the main admin page \(Administrator\)](#)

XXIII. Offline license revoke (Administrator)

At the moment, Product licenses can be revoked only when the Member or Guest uses them in an online mode. If, however, the user has borrowed a specific license for offline use the latter can't be revoked. When the Administrator attempts to do it, they will see the following message:

The source user example@user.com has borrowed licenses for offline use. To reallocate them, the borrowing period should first expire or the user should release them for online use.: invalid arguments or operation

In this instance, contact your ChaosGroup for assistance.

XXIV. Licenses on Centralized license server

If you are using a Central License server, where unengaged licenses can be obtained by users, and you have activated the Self-service portal feature, the following will happen:

Example:

- A Company centralized license server has 100 licenses
- 10 of these 100 licenses are allocated by the Administrator to Members or Guests in the organization
- The Company license server will have 90 available licenses to be engaged
- And the 10 licenses that are assigned to the Guests or Members will appear when they log in with their credentials on the license server on their computers

XXV. Update Cloud credits access individually (Administrator)

1. When Admin/Owner needs to enable access to the cloud credit pool for some of the users, just hover over the **Credits access** field for this user:

<input type="checkbox"/>	User - Guest example@user.com	...	1	20 · 20 available limit	0
<input type="checkbox"/>	User - Guest example@user.com	...		Disabled	0

2. Click on the field and select a predefined, unlimited or custom quota of maximum limit that this user can consume and select **Update**:

Update Cloud Credit Access

Disabled 20 50 100 1000 Unlimited 2

Cloud credits access - 20 / 20 Cancel Update **2**

3. If a custom amount of two cloud credits quota is set, for example, the Credits access field for this user will be updated and you will see that they have two cloud credits available out of two credits limit set.
4. When the user starts using their quota credits, the owner will see the available credits quota left for this user and their usage.
5. When access to the cloud credits pool or quota is set for a user, they will be notified about it via email.
6. By navigating to my.chaosgroup.com, **Members** will see their quota set, as well as their available cloud credits.
7. By navigating to my.chaosgroup.com, **Guests** will see their quota set under the Cloud credits tab.

Products **6**

You have no assigned products
Please contact your organization administrator

Cloud credits available
20 / 20 - [Request more cloud credits](#)

Available credits · 20 / 20 **7**

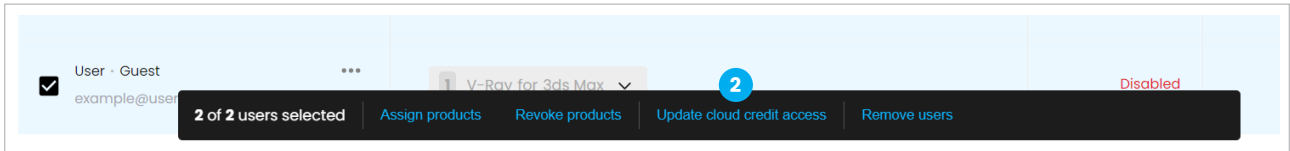
[Request more cloud credits](#)

Quick note
To be able to purchase Cloud credits for personal use, ask the administrator of the organization to disable your access to the organizational credits.

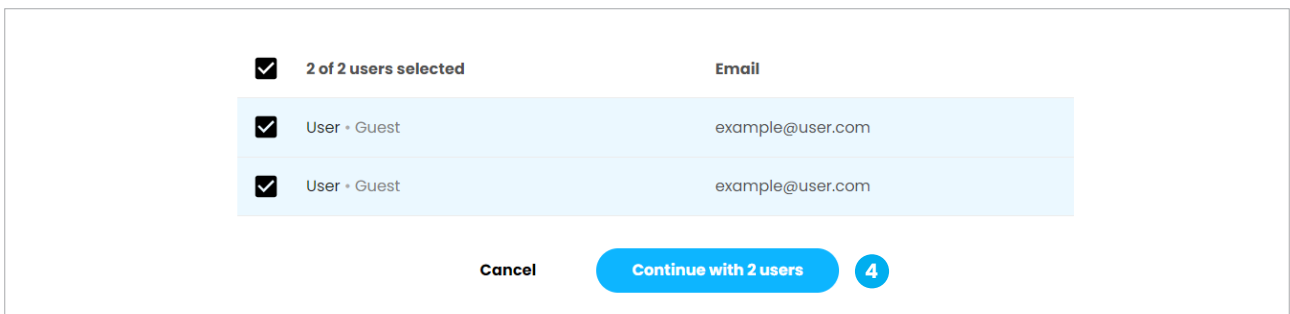
8. Both Members and Guests can request more Chaos cloud credits. The administrator will be notified by email.

XXVI. Update Cloud credits access from the main admin page (Administrator)

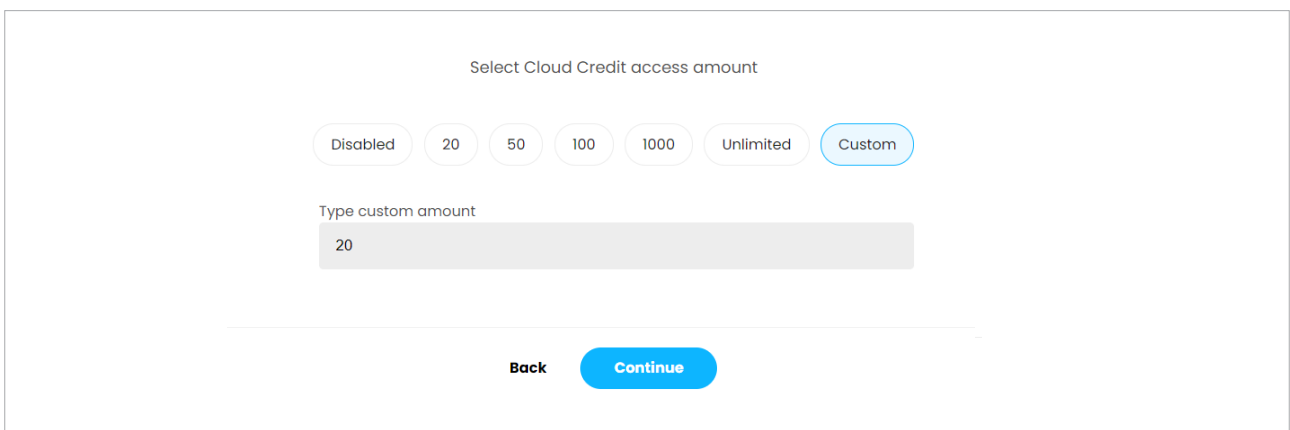
1. Select the users you would like to update the cloud credits access by using the checkboxes next to their names
2. Select the **“Update cloud credit access”** button from the menu at the bottom of the page



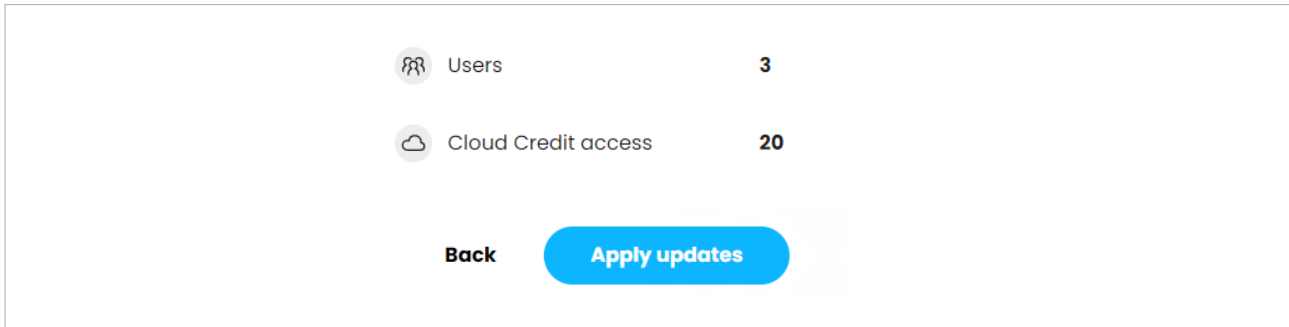
3. You will be presented with a list of the selected users which can be edited by using the checkboxes next to the user names. Select **“Continue with X users”**



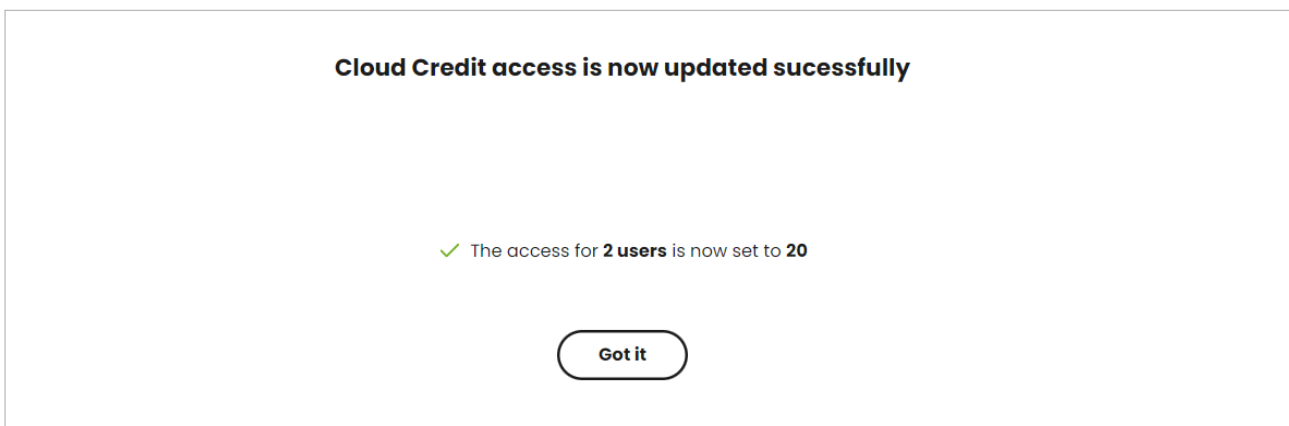
4. You will be presented with a screen to select the access of the users – disabled, unlimited, predefined or custom cloud credit quota. Click on **“Continue”**



5. You will be presented with a summary of the updates to be applied, select **“Apply updates”** button



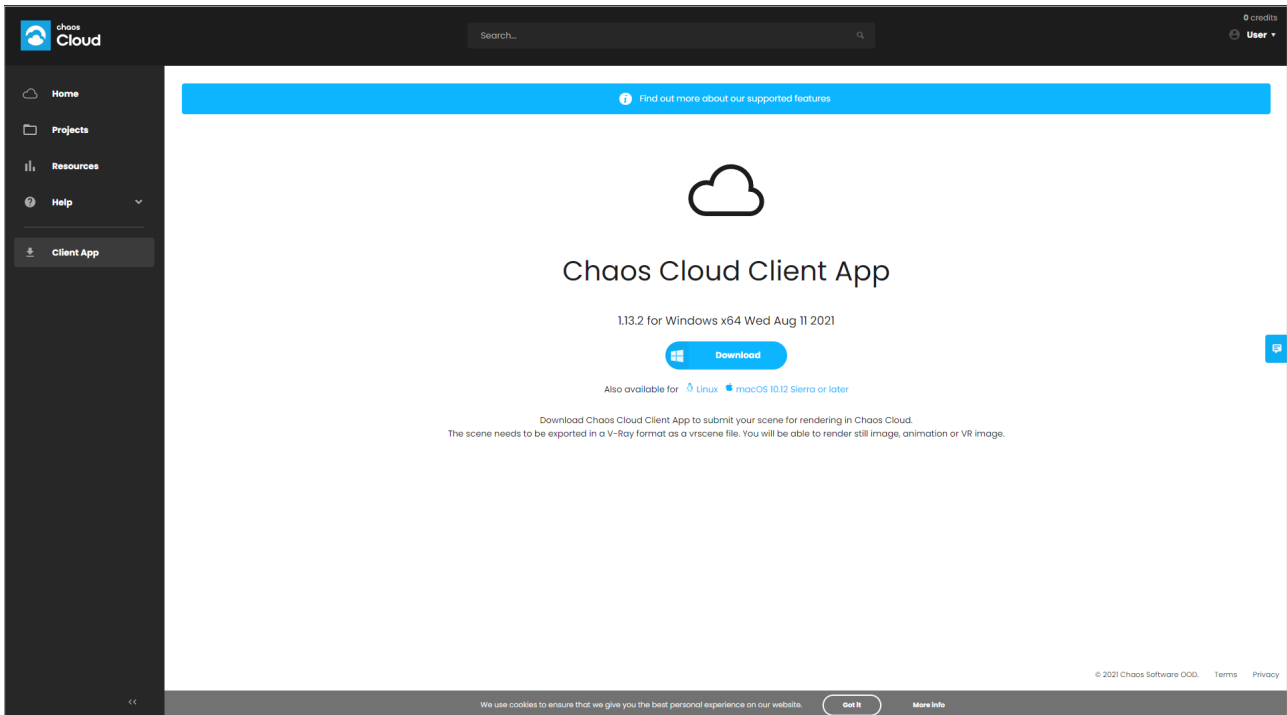
6. The cloud credits access of the selected users has been updated



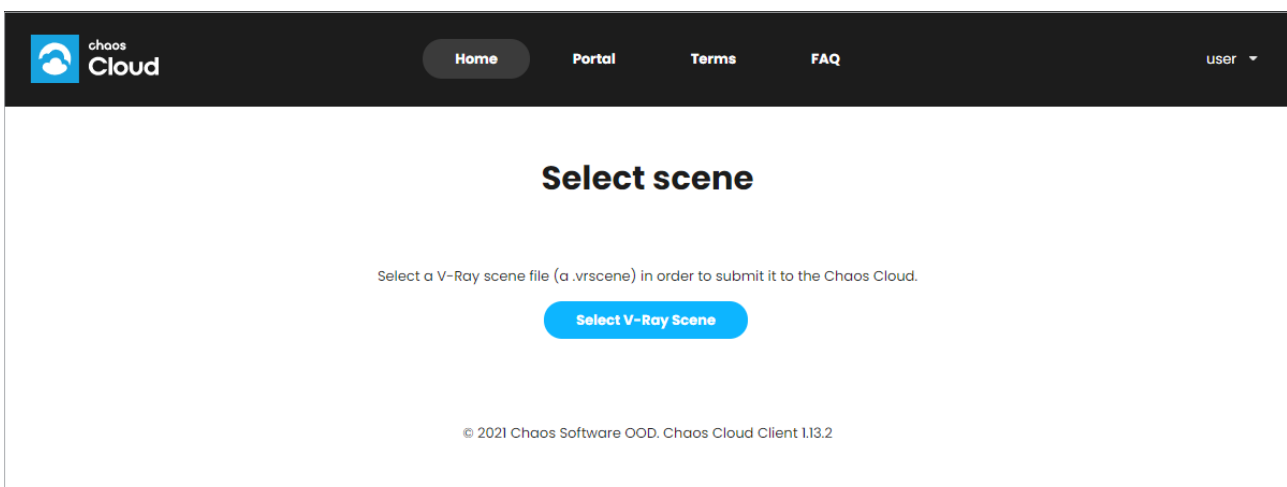
7. The users will be notified by email that their cloud credits access is updated

XXVII. Rendering in Chaos Cloud

1. Users can navigate to [Chaos Cloud](#) and download the client app if not already installed:

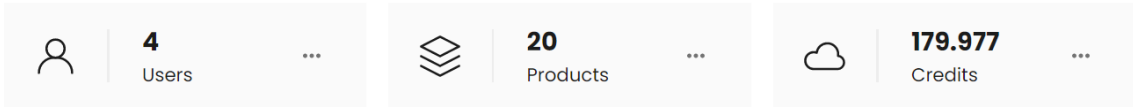


2. After opening the chaos cloud app **the User should verify that they are logged in with the correct email address as a Member or Guest of the organization.** If not, the User should logout and login again
3. After logging in with the correct credentials, the User can select a scene to be rendered



XXVIII. Cloud Credit Balance: Admin View (Administrator)

The Administrator can see the current balance of the organizational cloud credit pool by navigating to **Products** > “**Cloud Credits**” tab well as under the “**Organization**” tab in my.chaosgroup.com



A summary dashboard with three cards. The first card shows a person icon, the number 4, and the text 'Users'. The second card shows a stack of boxes icon, the number 20, and the text 'Products'. The third card shows a cloud icon, the number 179.977, and the text 'Credits'. Each card has a three-dot menu icon to its right.

Cloud credits

as of 16 Sep 2021 • 1:53 PM

Expiration date	Quantity
15 November 2021	20.000
8 April 2022	20.000
17 August 2022	40.000
No expiration date	99.977
Total	179.977

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