



# M-Files Cloud Vault Subscription Management Portal

User's Guide for Cloud Vault admins  
ID 120231 v 5, 8/14/2013

## 1. PURPOSE

This document explains how customer admins can use Subscription Management Portal to manage their M-Files Cloud Vault service.

## 2. USING SUBSCRIPTION MANAGEMENT PORTAL

### 2.1 LOGGING IN

The Subscription Management Portal is available at: <https://management.cloudvault.m-files.com/>.

A screenshot of the Subscription Management Portal login interface. At the top left is the M-Files Cloud Vault logo, which includes the blue 3D 'M' icon and the text 'M-Files Cloud Vault'. To the right of the logo are two light blue cloud icons. Below the logo, the text 'Subscription Management Portal' is centered. Underneath, there are two input fields: 'Username:' with the text 'testing.portal' and 'Password:' with a series of dots. A 'Log in' button is positioned below the password field.

**Subscription Management Portal**

Username:

Password:

Subscription Management Portal is a service portal for M-Files Cloud Vault administrators.

If you are an administrator, please contact [M-Files technical support](#) for the login credentials.

Log in to the portal using your portal administrator account. If you do not have an account to Subscription Management Portal you can request one from M-Files support ([support@m-files.com](mailto:support@m-files.com))

### 2.2. MAIN PAGE

The Subscription Management Portal main page displays general information about your cloud subscription, amount of licenses, list of current users and links to new user creation page, license order form and M-Files installers.

testing.portal » Help » Support » Logout

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### M-Files Cloud Vault Subscription Management

**Subscription Details:**

Customer: M-Files Testing  
Vault: Support test vault 1

Licenses assigned to users / total licenses available:

Named user licenses: 2 / 101  
Concurrent user licenses: 0 / 100  
Read-only licenses: 0 / 100

[Order more licenses](#)  
[Download M-Files installers](#)  
[Create a new M-Files Cloud Vault user](#)

**M-Files Cloud Vault Users:**

Username	Full name	E-mail address	License type	
mftest.admin	M-Files Support	support@m-files.com	Named	<a href="#">Edit</a> <a href="#">Remove license</a>
mftest.normal	M-Files Support	support@m-files.com	Named	<a href="#">Edit</a> <a href="#">Remove license</a>

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### 2.3. ORDERING MORE LICENSES

New licenses can be ordered directly from Subscription Management Portal. Click the 'Order more licenses' link on the main page, add the required amount of additional licenses to the assigned fields and submit your order. The new licenses are immediately available and will be invoiced by the M-Files team separately.

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### Order More Licenses

For information about M-Files Cloud Vault prices, contact our sales at sales@m-files.com or call:  
USA & Canada: 1-800-224-4074 or 1-972-516-4210.  
Other countries: +358 3 3138 7500.

**Add Licenses to Subscription**

Named user licenses:   
Concurrent user licenses:   
Read-only licenses:

[Return to main page](#)

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### 2.4. DOWNLOADING M-FILES INSTALLER

You can download M-Files Client and Server Administrator installers that are automatically configured with your vault's information. Click the 'Download M-Files Installers' link on the main page and choose the appropriate version.

## 2.5. CREATING A NEW USER

Click the 'Create a new M-Files Cloud Vault user' link on the main page to add a new user to your vault(s).

Fill in the required fields with user details and choose appropriate license type. Username prefix is derived automatically from your vault's user naming scheme. *Note that while most user information can be edited later, username is fixed once a user is created and it cannot be edited.*

If you have one vault in use then the user is automatically assigned to your vault. If you have multiple vaults in use, you can choose to which vaults the user is added. You can edit users' vault membership settings later (see '2.6. Editing user details').

If the "Notify user by e-mail" option is selected, the user receives an e-mail with credentials to the system.

If you include the download link to the M-Files installer, user also receives a download link to the installer.

User creation page also indicates how many licenses are available of each type. In case you don't have specific license types available, you can order additional licenses from the portal (see chapter 2.3.).

## 2.6. EDITING USER DETAILS

User details can be edited via the 'Edit' link next to the user's name on the Main Page.

testing.portal » Help » Support » Logout

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Cloud Vault

### Edit M-Files Cloud Vault User

Username: mftest.admin  
 Full name: M-Files Support  
 E-mail address: support@m-files.com  
 Change password:   
 Confirm password:

License type:  
 » Named user  (99 free)  
 » Concurrent user   
 » Read-only user  (100 free)  
 » None

Notify user by e-mail  
 Include download link to M-Files installer:  
 » M-Files language: English  
 » M-Files platform: 64-bit (x64) and 32-bit (x86)

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Edit page allows you to change the name, e-mail address, and license type of a user. Additionally, it allows you to reset user's password. If you have more than one vault in use this page also displays your active vaults and allows you to add/remove user from those vaults.

With the 'Notify user by email' feature, you can send the user credentials directly to the e-mail address specified in user details.

## 2.7. REMOVING A USER LICENSE

Removing licenses from users and release them for use is possible from 'Remove license'. Removing a user's license effectively disables the user. A license released this way can be added for another user.

testing.portal » Help » Support » Logout

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### Remove M-Files Cloud Vault User License

Username: mftest.normal  
 Full name: M-Files Support  
 E-mail address: support@m-files.com

Are you sure you want to remove the M-Files license from this user?  
 This means that the user will not be able to log in unless a license is reassigned.

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You can also remove a license from user from user's information (see '2.6. Editing user details')

## 2.8. DELETING A USER

Cloud vault users can also be deleted in Subscription Management. Only users with no license can be deleted. Therefore if a user has a license then the license first needs to be removed and only after that can you delete the user (see '2.7. Removing a user license').

### M-Files Cloud Vault Users:

Username	Full name	E-mail address	License type		
mftest.admin	M-Files Support	support@m-files.com	Named	<a href="#">Edit</a>	<a href="#">Remove license</a>
mftest.normal	M-Files Support	support@m-files.com	Named	<a href="#">Edit</a>	<a href="#">Remove license</a>
mftest.supporttest	Support Test User	support@m-files.com	No license	<a href="#">Edit</a>	<a href="#">Delete</a>

Please be advised that deleting a user removes the user's information from the system and vault's metadata, which can result in loss of information. Creating a new user with the same user information later on won't restore the original user to system. Generally disabling a user by removing the license is the best practice to revoke access to the system.

## 3. HELP

Help and information about Subscription Management Portal features can be accessed from the Help link at the upper right corner of main page.

Please contact M-Files Support if you have any questions regarding Subscription Management Portal.