Tungsten Power PDF
Cloud Licensing Guide

Version: 5.1.0

Date: 2024-07-11

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Revision history

This table lists the initial version of the Cloud Licensing Guide.

Revision	Date	Description
Tungsten Power PDF 5.1.0	April 12, 2024	Initial version.
Tungsten Power PDF Business for Mac 5.1.0	July 12, 2024	Apple ID authentication added.

Preface

This guide is intended for administrators who are responsible for setting up and managing Tungsten Cloud License Server for their organization.

System requirements

The primary source of system requirements and dependencies about compatible Tungsten products is the *Technical Specifications*.

- Tungsten Power PDF Advanced Volume or Tungsten Power PDF Reader 5.1.0: https://docshield.tungstenautomation.com/Portal/Products/PowerPDF/5.1.0-cyu29ubkgp/PowerPDF.htm
- Tungsten Power PDF Business for Mac 5.1.0: https://docshield.tungstenautomation.com/Portal/Products/PowerPDFforMac/5.1.0-178hqwaru8/PowerPDFforMac.htm

We recommend reviewing these regularly updated documents carefully to ensure success with your product.

For the list of currently supported products, see Requirements.

Getting help with Tungsten products

The Tungsten Knowledge Portal repository contains articles that are updated on a regular basis to keep you informed about Tungsten products. We encourage you to use the Knowledge Portal to obtain answers to your product questions.

To access the Tungsten Knowledge Portal, go to https://knowledge.kofax.com.

> The Tungsten Knowledge Portal is optimized for use with Google Chrome, Mozilla Firefox, or Microsoft Edge.

The Tungsten Knowledge Portal provides:

- Powerful search capabilities to help you quickly locate the information you need.

  Type your search terms or phrase into the **Search** box, and then click the search icon.
- Product information, configuration details and documentation, including release news.

  To locate articles, go to the Knowledge Portal home page and select the applicable Solution Family for your product, or click the View All Products button.

From the Knowledge Portal home page, you can:

- Access the Tungsten Community (for all customers).

  On the Resources menu, click the **Community** link.

- Access the Tungsten Customer Portal (for eligible customers).
  Go to the Support Portal Information page and click **Log in to the Customer Portal**.
- Access the Tungsten Partner Portal (for eligible partners).
  Go to the Support Portal Information page and click **Log in to the Partner Portal**.
- Access Tungsten support commitments, lifecycle policies, electronic fulfillment details, and self-service tools.
  Go to the Support Details page and select the appropriate article.

Training

Tungsten Automation offers both on-demand and instructor-led training to help you make the most of your product. To learn more about training courses and schedules, visit the Tungsten Automation Learning Cloud.

Introduction

Tungsten Cloud License Server (CLS) provides an alternative for the on-premise Tungsten License Server (KLS) used to manage term-based product licenses for various Tungsten products. Unlike KLS, Cloud License Server does not require customers to host the licensing server themselves: CLS is hosted by Tungsten and enables Tungsten Power PDF Advanced or Power PDF Reader to connect, verify, and receive licensing information for users.

Requirements

Tungsten Cloud License Server supports the following products:

- Tungsten Power PDF Advanced Volume 5.1.0 or later.
- Tungsten Power PDF Reader 5.1.0 or later.
- Tungsten Power PDF Business for Mac 5.1.0 or later.

If your license contains any other product, contact the Tungsten Order Fulfillment team or Tech Support to change the license configuration.

> When it is discovered that CLS is not compatible with the licensing solution, it may be necessary to delete the tenant and the original user account.

The following web browsers support the Tungsten Admin Portal:

- Google Chrome
- Microsoft Edge
- Mozilla Firefox

Components and architecture

Tungsten Cloud License Server consists of the following main components:

- Tungsten Power PDF Advanced
- Tungsten Admin Portal: a web application for organization administrators where they activate their product license, manage users, and assign license seats.
- Azure Active Directory Business To Customer (Azure AD B2C): Optional customer identity access management (CIAM) solution that enables administrators to sign up and sign in their users into applications. User information is stored in CLS User Directory in Azure. See Microsoft Entra ID for details.

Tungsten Admin Portal

This section describes how to set up and manage cloud licensing for your organization (tenant) in the Tungsten Admin Portal. The portal URL is specified in the email you received from the Tungsten Order Fulfillment team. At the time of publication of this guide, it is:

https://admin.ppdf.kofaxcloud.com/

Account setup

Before managing users, set up a Tungsten Admin Portal account, including administrators, contacts and the tenant with the license.

Create an administrator account

If you do not have an account on the Tungsten Admin Portal, sign up as follows:

1. Go to the Tungsten Admin Portal and select **Continue registration**.
2. On the **Sign in** page, select **Sign up now**.
3. On the **User Details** page, enter your information.

   To verify your email address, click **Send verification code**, then enter the code you received through email.
4. Select **Continue**.

   The **Register a new tenant** page appears. See Register a new tenant for details.
5. After you click **Register**, the Tungsten Admin Portal appears with your tenant information and prompts you to finish the tenant configuration. See Finish configuration.

Log into your administrator account

1. Go to the Tungsten Admin Portal and select **Continue login**. The **Sign in** page opens.
2. Sign in to the Tungsten Admin Portal using a valid authentication method. The **Select a tenant** page opens.
3. Depending on tenant status, do one of the following:
   - If you are already an administrator of one or more tenants, the Tungsten Admin Portal lists the ones under your authority. Select the tenant to work with.
   - If you do not have any registered tenants yet, proceed to Register a new tenant to create a new one.

Register a new tenant

Before registering a tenant and a license, you must register a Tungsten Admin Portal account. See Create an administrator account for details.

1. Go to the Tungsten Admin Portal.
2. Select **Continue login**.
3. On the **Register a new tenant** page, enter the following information:
   - **Serial number**: Find it in the email from Order Fulfillment.

     If a serial is already used on an on-premise license server, submit a move license request to Tungsten support before registering in the Tungsten Admin Portal. To submit a move license request, open https://activatelegacy.kofax.com/support/activationtemp/tempcode.aspx in your browser and select **Move Software License** in the **Reason** drop-down list.

   - **Product code**: Find it in the email from Order Fulfillment.
   - **Tenant name**: Only Tungsten administrators can modify the tenant name. A unique tenant ID is also generated.
   - **Description**: Enter descriptive information about your tenant.
4. Click **Register**. If all the details are entered correctly, the Tungsten Admin Portal appears for the created tenant.
5. To register another tenant, click your profile at the top right corner of the window and select **Register a new tenant**.
6. To manage licensing settings for another tenant, select **Switch tenant**.
7. Review your tenant data. Click **Administration** ( ) near the tenant name and email address at the top right of the page then select **Tenant details** on the left menu bar.

Manage your administrators

Administrators have access to the Tungsten Admin Portal and they can grant or revoke user licenses.

1. Click **Administration** ( ) near the tenant name and email address at the top right to open the **Administration** page.
2. Select **Administrators** on the left menu bar. The **Administrators** tab opens.
3. To delete an administrator, select the check mark next to their email address and click **Remove administrator**. You can mark multiple administrators for deletion. You cannot remove the last administrator because at least one must remain.

   No confirmation message appears.

4. To add an administrator, click **Add administrator** at the top-right of the administrators list. The **Add users to Administrators** page opens.
   a. Select the **Send email notification to newly added administrators** option to automatically send notification email to the new users.
   b. Enter user details in the **Email**, **User name**, and **Description (optional)** boxes.

c. Click **add more user** as many times you need and repeat the above step.

d. To remove an unnecessary line, click at the line ending.

> No confirmation message appears.

e. Click **Add user(s)**.

Manage license and security contacts

License and security contacts receive a notification email about security issues or significant events, such as depleting the license or nearing the end of the term.

1. Click **Administration** ( ) near the tenant name and email address at the top right to open the **Administration** page.
2. Select **Contact information** on the left menu bar. The **Contact information** tab opens.
3. To add a contact, click **add more contact** and enter the details in the **Email**, **User name**, and **Description (optional)** boxes.
4. To remove a contact, click at the line ending. You cannot remove the last contact because at least one must remain.

   > No confirmation message appears.

5. Click **Save**.

Finish configuration

When you first log in to the Tungsten Admin Portal, proceed to the **Complete your configuration** section on the **Overview** page to finish setting up the administrators and users for your tenant. Completed tasks have a check mark.

Task	Description
Manage your administrators	The user who created the tenant is an administrator by default. You can add additional administrators by clicking the **Add user** button.
Register your administrative contacts	Provide the contact information of users who can be notified regarding license or security issues. See Manage license and security contacts.
Review your user management configuration and authentication methods	Select your strategy for user management. Manage your users directly in the Tungsten Admin Portal or rely on Microsoft Entra ID. See User management methods for details. Changing between user management modes deletes all the users that were assigned using the current mode. Under **Authentication types**, select the authentitcation method to use in the licensed application. See User authentication in the licensed application for details.
Manage your users	Start assigning users to your licenses. For more information, see Manual group and user management or Entra ID group and user management.

As soon you complete the configuration, the Tungsten Admin Portal opens the **Overview** tab with license charts. **Helpful resources** appear on the right.

Refresh tenant license information

Azure automatically updates tenant information every 24 hours. In certain cases, a manual update may be required, for example:

- Increase or decrease in the number of seats (for example, license purchase)
- Tungsten Order Fulfillment department modifies license information (for example, renewal)

1. Click **Administration** ( ) near the tenant name and email address at the top right of the page then select **Tenant details** on the left menu bar.
2. For more details about automatic license refresh, click **more info** in the information box under **Refresh license**.
3. For an immediate refresh, click **Refresh license** at the bottom of the page.

User management methods

Tungsten Admin Portal grants a license seat to all users within the pertaining product group.

> Changing between user management modes deletes all the users that were assigned using the current mode.

On the **User management mode** tab of the **Administration** page, the following options are available:

- **Manage users manually**

  Administrators can manage users and groups directly in the Tungsten Admin Portal. All authentication methods are available (Tungsten ID, Microsoft Entra ID, Google, and Apple ID). See Manage users manually for details.

  > When switching back from Entra ID to manual user management, make sure to stop the Entra ID application provisioning. See Manage provisioning in Entra ID for details.

- **Synchronize users from Entra ID**

  Administrators can rely on Microsoft Entra ID regarding user management, leveraging the " Tungsten Power PDF Entra ID Identity Management " enterprise application. Only Entra ID remains active under **Authenthication types**. See Synchronize users from Entra ID for details.

Manage users manually

You can set up manual user management during tenant creation, or on the **User management mode** tab of the Administration page.

When switching back from Entra ID to manual user management, make sure to stop the Entra ID application provisioning. For details, see Manage provisioning in Entra ID.

1. Click **Administration** ( ) near the tenant name and email address at the top right of the page then select **User management mode** on the left menu bar.
2. Under **Effects of changing user management mode**, select the **I understand the effects of changing user management mode** option.

   Changing between user management modes deletes all the users that were assigned using the current mode.

3. In the **Change user management mode** drop-down list, select **Manage users manually**.
4. Under **Authentication types**, select the authentication method to use in the licensed application. See User authentication in the licensed application for details.
5. Click **Save**.

Changing the user management mode removes all users. To add users, do any of the following:

- Add users
- Add users by CSV

Synchronize users from Entra ID

You can set up user management during tenant creation, or on the **User management mode** tab of the Administration page.

1. Click **Administration** ( ) near the tenant name and email address at the top right of the page then select **User management mode** on the left menu bar.
2. Under **Effects of changing user management mode**, select the **I understand the effects of changing user management mode** option.

   Changing between user management modes deletes all the users that were assigned using the current mode.

3. In the **Change user management mode** drop-down list, select **Synchronize users from Entra ID**.
4. Click **Start guide** and follow the instructions.

   Tungsten Admin Portal provides a wizard on how to configure Entra ID for your organization. These instructions include creating and assigning Entra ID groups and setting up provisioning for the first time. For further details on Entra ID management, see the Entra ID group and user management and Entra ID provisioning sections.
5. Under **Authentication types**, select the **Entra ID** authentication method to use in the licensed application. See User authentication in the licensed application for details.
6. Click **Save**.

After successful configuration, your Entra ID directory is connected to the Tungsten Admin Portal and your license information appears on the Overview page.

Manual group and user management

Before you could grant license seats to your users, complete your Tungsten Admin Portal Account setup with administrators, contacts and license, then log in to the portal. Also, make sure you select manual user management. See Manage users manually for details.

The Products page of the Tungsten Admin Portal enables you to review license information for your products, and to manage your users for each product.

Add users

Do the following to assign a small number of users to a product. A user assigned to the product occupies a license seat and can run the product.

1. On the top menu bar, click **Products**.
   The **Products** page opens.
2. If the tenant has multiple products, select the preferred product on the left.
   Product details appear, offering the license statistics over time and license terms with start and end dates.
3. Click **Add user**.
4. Enter the user details in the dialog box that appears.
   a. Enter user details in the **Email**, **User name**, and **Description (optional)** boxes.

      Tungsten Admin Portal discards new user data for users with the same email address already in use. To update a user, remove it before adding it again.

   b. Click **add more user** as many times you need and repeat the above step.
   c. To remove an unnecessary line, click at the line ending.

      No confirmation message appears.

   d. Click **Add user(s)**.

Add users by CSV

Do the following to assign multiple users to a product, using a .csv file. A user assigned to the product occupies a license seat and can run the product.

Tungsten Admin Portal discards new user data for users with the same email address already in use. To update a user, remove it before adding it again.

1. On the top menu bar, click **Products**.
   The **Products** page opens.
2. If the tenant has multiple products, select the preferred product on the left.
   Product details appear, offering the license statistics over time and license terms with start and end dates.

3. Click **Add users by CSV**.
   A dialog box appear.
4. Under **step 1**, click **Download CSV template**.
   The `user-template.csv` file downloads.
5. Replace the sample data with valid user data and save. Follow the data structure provided in the file.

   On the screen, read the instructions about the maximum number of users per .csv file. If you need to add more users than allowed, split the data into multiple .csv files and repeat the process with each.
6. Under **step 2**, click **Choose File**.
   An **Open** dialog box appears.
7. Browse to the .csv file and select it.
8. Click **Upload and add users**.

Remove users

Do the following to unassign a small number of users for a product. Unassigning a user releases a license seat and the removed user cannot run the product.

1. On the top menu bar, click **Products**.
   The **Products** page opens.
2. If the tenant has multiple products, select the preferred product on the left.
   Product details appear, offering the license statistics over time and license terms with start and end dates.
3. Optionally, enter a search phrase and click **Search** to find a specific user.
4. Select the users for removal.
   If at least one user is selected, the **Remove user** button appears above the **Search** button.
5. Click **Remove user**.

   > No confirmation message appears.

Remove users by CSV

Do the following to unassign multiple users for a product, using a .csv file. Unassigning a user releases a license seat and the removed user cannot run the product.

1. On the top menu bar, click **Products**.
   The **Products** page opens.
2. If the tenant has multiple products, select the preferred product on the left.
   Product details appear, offering the license statistics over time and license terms with start and end dates.
3. Click the menu button (...) above the **Search** button, then select **Remove users by CSV** from the list.
   A dialog box appear.
4. Under **step 1**, click **Download CSV template**.
   The `user-template.csv` file downloads.

5. Replace the sample data with valid user data and save. Follow the data structure provided in the file.

   On the screen, read the instructions about the maximum number of users per .csv file. If you need to add more users than allowed, split the data into multiple .csv files and repeat the process with each.
6. Under **step 2**, click **Choose File**.
   An **Open** dialog box appears.
7. Browse to the .csv file and select it.
8. Click **Upload and delete users**.

Export users to CSV

Do the following to export the list of users to a .csv file.

1. On the top menu bar, click **Products**.
   The **Products** page opens.
2. If the tenant has multiple products, select the preferred product on the left.
   Product details appear, offering the license statistics over time and license terms with start and end dates.
3. Click the menu button (...) above the **Search** button, then select **Export users list to CSV** from the list.

Your browser downloads the user list. The .csv file is named according this template:

ProductName user list.csv

For example:

```
Power PDF Advanced Volume  user list.csv
```

Overview licenses, products and users

Tungsten Admin Portal offers the Overview, Products, Reporting, and Support pages for daily supervision for your tenant. The following sections describe the most common tasks for administrators.

Overview license use charts

After a successful login, the Tungsten Admin Portal opens the Overview page. Review your license charts.

1. If your account setup is not completed, the **Complete your configuration** wizard appears. Proceed with the missing steps so you can start manage your licenses. See Finish configuration for details.
2. If your account setup is completed, the Tungsten Admin Portal displays a card for each license type. Review your licenses.
   a. Identify the preferred card by the licensed product name in the title.

      For example: Power PDF Reader

   b. Move the pointer over the doughnut chart on the preferred card.

      Depending on the chart area you point to, one of the following tooltips appears followed by the value:

      - **Remaining licenses**
      - **Assigned users**

   c. Read the statistic values in the middle of the chart under **Licenses** as follows:

      Assigned users / Remaining licenses

      For exmaple: 5 / 14

   d. Under the chart, click **Manage product**.

      Product details appear, offering the license statistics over time and license terms with start and end dates.

3. Visit the **Helpful resources** section on the right, offering links to the following:
   - **Administration** > **User management mode** (menu item)
   - **Administration** > **Tenant details** (menu item)
   - Tungsten Sales support and license renewal (external link)
   - Technical support (external link)

Overview license seats per user

To view which users are assigned to a certain product or products, run User report.

1. On the top menu bar, click **Reporting**.
   The **Reporting** page opens with the **Report** tab active.
2. On the left menu bar, click **User report**.
   The **User report** tab opens with the filtering bar at the top, followed by the list of users.
3. On the filtering bar, set the preferred parameters.

   With default parameters, the list includes users assigned to any of the products.

   a. **Select product**: Click the button to drop the product list down, then select the preferred products.

      By default, no products are selected.

   a. In the search box, enter a simple search phrase to filter the event message.

      > The filter searches exactly for the typed text, so the order of the words is important.

4. Click **Search**.
   The list of users appears filtered as above.

Overview products, terms and users

If the tenant has multiple products, the Product page has vertical tabs on the left, one for each product. The product tabs display license and term details.

1. On the top menu bar, click **Products**.
   The **Products** page opens.
2. If the tenant has multiple products, select the preferred product on the left.

Product details appear, offering the license statistics over time and license terms with start and end dates.

3. Overview **License statistics**. The box displays the following data:
    - **Maximum**: The maximum number of license seats granted for the tenant.
    - **Used**: The number of active users currently reserving a license seat.
    - **Assigned users**: The number of users currently assigned to the product.
4. Overview **Terms**. The box displays the following data arranged in rows for each closed and active term.
    - **Start date**: The opening day of the license period.
    - **End date**: The closing day of the license period. A dash (-) indicates a perpetual license.
    - **Count**: The maximum number of licenses granted for the term.
5. Overview users. Use the **Search** box to find a user by name, email, or description.

Create a license CSV report

To review or process your license usage data in a spreadsheet or other application, create a CSV report. The .csv files included in the report detail the availability of your licenses and the first and last time your users accessed specific products.

1. On the top menu bar, click **Reporting**.
   The **Reporting** page opens with the **Report** tab active.
2. Click **Create report**.
   Your browser downloads the `Report.zip` file, containing the following files:
    - `license.csv`: This file lists the volume in all license term periods for each product.
    - `users.csv`: This file includes a line for each user. Besides user data, the license assignments, the requested volume, and the date of the first and last use for all products appear.

Overview system logs

To overview the events in the Tungsten Admin Portal and the synchronized Entra ID account, use the system logs.

1. On the top menu bar, click **Reporting**.
   The **Reporting** page opens with the **Report** tab active.
2. On the left menu bar, click **System logs**.
   The **System logs** tab opens with the filtering bar at the top, followed by the list of events.
3. On the filtering bar, set the preferred parameters.

   With default parameters, the list includes events of all types from the last seven days with **High (or above)** severity.

    a. **Start date**: Type a starting date or click the calendar icon (📅) to select it from the calendar.

       By default, this date is set one week earlier than the current date.

    a. **End date**: Type an end date or click the calendar icon (📅) to select it from the calendar.

       By default, this is the current date.

    b. **Type**: Select the event type to include.

By default, **All** is selected.

c. **Message**: Enter a simple search phrase to filter the event message.

> The filter searches exactly for the typed text, so the order of the words is important.

d. **Severity**: Select the event severity to include.
   By default, **High (or above)** is selected.

e. Optionally, click **Reset filters** and start over setting up the parameters.

4. Click **Apply filters**.
   The list of events appears filtered as above.

Request support

Before requesting personal assistance, please check the Support page. This page organizes resources and contacts to all related training, knowledge and support related to the Tungsten Admin Portal and Power PDF Advanced.

1. On the top menu bar, click **Support**.
   The **Support** page opens.
2. Look for the kind of support that best suits your needs.
   a. If you are new to the Tungsten Admin Portal, check the resources under **Community & Learning**.
   b. For professional training and complementary services, check the resources under **Services**.
   c. To open a product or sales support case, check the resources under **Product Support**.

Microsoft Entra ID

This section describes how to set up and manage a Microsoft Entra ID provisioning for the Tungsten Admin Portal. This section is relevant only if you selected the **Synchronize users from Entra ID** option. See User management methods for details.

When you switch to Entra ID, the Start Guide wizard helps you to create a group for each licensed product and set up the provisioning between Azure and the Tungsten Admin Portal. As soon the wizard is completed, those Entra ID groups are connected to the product tabs on the left side of the Product page in the Tungsten Admin Portal. Adding and removing your Entra ID users to those groups are occupying and releasing license seats, reflected in the user lists of the Product page in the Tungsten Admin Portal.

> The provisioning is not instant, but it takes time for changes made in Azure to appear in the Tungsten Admin Portal. The time needed depends on the configuration and the amount of data. To verify the the time of the last provisioning, see Manage provisioning in Entra ID up to step 2.

Entra ID group and user management

Before you could synchronize your Entra ID userbase with the Tungsten Admin Portal, you need to perform the following tasks:

1. Complete your Tungsten Admin Portal Account setup with administrators, contacts, and license.
2. Set up the Tungsten Admin Portal for synchronizing users from Entra ID.

Log in to Azure and select your tenant

1. Log in to Azure.
2. On the **Welcome** screen, click **Microsoft Entra ID** under **Azure services**.
   The **Overview** page opens.
3. If you have multiple tenants, select the one related to the Tungsten Admin Portal you are managing. To work with another tenant do the following:
   a. Click **Manage tenants** on the top menu bar.
   b. Select the preferred tenant from the list.
   c. Click **Switch** on the top menu bar.

Now you can start to manage your users and groups.

Add an Entra ID user

Do the following to create an Entra ID user:

1. On the **Overview page**, click **Users** under **Manage** on the left menu bar.
   The **Users** page opens.
2. On the top menu bar, select **New user** > **Create new user**.
   The **Basic** tab of the **Create new user** page appears.
3. Provide **User principal name**, consisted of a custom user name and the domain related to the tenant. This email-like name will identify the user in the Tungsten Admin Portal.
   a. In the box left to the @ sign, enter the user name.
   b. In the combo box right to the @ sign, leave the domain as it is.
4. Enter the **Display name**.
5. Clear the **Auto-generate password** option.
6. Enter a **Password**.
7. At the bottom, click **Next: Properties >**.
   The **Properties** tab of the **Create new user** page appears.
8. In the **Email** box under **Contact information**, provide a contact email address for the user. This does not have to match with the **User principal name**.

   Though Azure allows you to save the user with an empty **Email** box, the Tungsten Admin Portal cannot identify and manage the user without this email address.

9. At the bottom, click **Review + create**.
   The **Review + create** tab of the **Create new user page** appears.
10. Verify the user properties.

    In case of incomplete data, warnings can appear in red below the top menu bar. Make sure to address those issues to be able to proceed.
11. Click **Create** to add the user.

To grant a license seat to a user, add them to the related Entra ID group. See Add users to an Entra ID group for details.

Add an Entra ID group

1. On the **Overview page**, click **Groups** under **Manage** on the left menu bar.
   The **Groups** page opens.
2. On the top menu bar, select **New group**.
   The **New group** page appears.
3. Under **Group type**, select **Security**.
4. Enter a **Group name**.

   If you change **Group name** later, after it is set up in the Tungsten Admin Portal, Cloud License Server cancels the assignment of group members to the licensed product. **Group name** should match in Entra ID and Admin Portal for successful license assignment.

5. Under **Membership type**, select **Assigned.**
6. At the bottom, click **Create** to add the group.

The new group will appear in the list on the Groups page.

Add users to an Entra ID group

Group members occupy a license seat per user for the related product. Do the following to assign Entra ID users to a group:

1. On the **Overview page**, click **Groups** under **Manage** on the left menu bar.
   The **Groups** page opens.
2. Select the preferred group in the list.

   To refine your search, use the **Search** box under the top menu bar, or click **Add filter**.
3. Click **Members** under **Manage** on the left menu bar.
   The **Members** page of the group appears.
4. On the top menu bar, select **Add members**.
   The **Add members** pane appears.
5. In the list, select the users to add.

   To narrow the list, use the **Search** box at the top of the pane.

   All selected users appear on the right.
6. At the bottom, click **Select**.
7. On the **Members** page of the group, select **Refresh** on the top menu bar.
8. Verify that the recently added users appear in the list.

Remove users from an Entra ID group

Removed members release a license seat per user for the related product. Do the following to remove Entra ID users from a group:

1. On the **Overview page**, click **Groups** under **Manage** on the left menu bar.
   The **Groups** page opens.
2. Select the preferred group in the list.

   To refine your search, use the **Search** box under the top menu bar, or click **Add filter**.
3. Click **Members** under **Manage** on the left menu bar.
   The **Members** page of the group appears.
4. Browse the list, or use the **Search** box and the **Add filter** command to look for specific users as needed.
5. On the top menu bar, click **Remove**.
   A confirmation dialog box appears.
6. Select **Yes** to confirm removal.

List or export users from an Entra ID group

Do the following to browse or export the list of Entra ID users to a .csv file:

1. On the **Overview page**, click **Groups** under **Manage** on the left menu bar.
   The **Groups** page opens.

2. Select the preferred group in the list.

   To refine your search, use the **Search** box under the top menu bar, or click **Add filter**.
3. Click **Members** under **Manage** on the left menu bar.
   The **Members** page of the group appears.
4. Make sure that the **Email** column is part of the list. If not, click **Columns** on the top menu bar, then select **Email** in the **Column** pane and click **Save**.
5. Browse the list, or use the **Search** box and the **Add filter** command to look for specific users as needed.
6. To download the list of users in a .csv file, do the following:

   a. On the top menu bar, select **Bulk operations** > **Download members** .

      The **Download members** pane appears on the right.

   b. Edit the **File name** in the box, then click **Start**.
      The operation starts.

   c. Click **Bulk operation results** under **Activity** on the left menu bar. The **Bulk operation results** page opens.

   d. Verify whether the result was completed and successful.

   e. Click the related line to open the **Bulk group list member** page for the file.

   f. In the **Result** column, click **Download results**, then save the .csv file.
      The results always contain all the members, regardless the filtering applied on the **Members** page.

Create a dynamic Entra ID group

To make easier to manage users from multiple groups, organize those into a dynamic Entra ID group.

1. On the **Overview page**, click **Groups** under **Manage** on the left menu bar.
   The **Groups** page opens.
2. Make sure that the **Object Id** column is part of the list. If not, select **Manage view** > **Columns** on the top menu bar, then select **Object Id** in the **Columns** pane and click **Save**.
3. Carefully note **Object Id** for all the groups to include in a new dynamic group.
4. On the top menu bar, select **New group**.
   The **New group** page appears.
5. Under **Group type**, select **Security**.
6. Enter a **Group name**.
7. Under **Membership type**, select **Dynamic User**.
8. Click **Add dynamic query**. The **Dynamic membership rules** page appears.

   a. Click **Edit** at the top-right of the **Rule syntax** box.
      The **Edit rule syntax** pane appears.

   b. In the Rule syntax box, enter a dynamic rule according the following template:

      `user.memberof -any (group.objectid -in [`*`list of group object IDs to include`*`])`

      For example:

```
user.memberof -any (group.objectid -in ['de527...', 'abcd1234....'])
```

   a. Click **OK** to close the editor pane and return to the **Dynamic membership rules** page.

9. On the top menu bar, click **Save** to return to the **Nex Group** page.
10. At the bottom, click **Create** to add the group.

The new group appears in the list on the Groups page.

Entra ID provisioning

Entra ID uses an enterprise application for user account provisioning for the Tungsten Cloud License Server and the Tungsten Admin Portal.

To check statistical details on provisioning, such as the time of the last provisioning completed, see Manage provisioning in Entra ID up to step 2.

Select your enterprise application

1. Log in to Azure. See Log in to Azure and select your tenant for details.
2. On the **Welcome** screen, click **Microsoft Entra ID** under **Azure services**.
   The **Overview** page opens.
3. Select **Enterprise applications** on the left menu bar.
   The **All applications** tab opens.
4. In the list, select the application you created earlier, as you were following the on-screen **Start guide**. See step 4 in Synchronize users from Entra ID for details.
   The application **Overview** tab opens, where you can manage your application. See Manage provisioning in Entra ID for details.

Manage provisioning in Entra ID

Select your enterprise application before proceeding with the following steps. See Select your enterprise application for details.

1. Click **Provisioning** on the left menu.
2. For statistical details, open **View provisioning details** under **Statistics to date**.
   - **Completed**: The date and time of the last successful provisioning.
   - **Duration**: The time consumed by the last provisioning.
   - **Provisioning interval(fixed)**: Elapsed time between two provisioning jobs.
3. On the top menu, select the preferred command:
   - **Start provisioning**: When switching to Entra ID synchronization, you need to start the provisioning after the groups, users, and the application are set up.
   - **Stop provisioning**: When switching back from Entra ID to manual user management, make sure to stop the Entra ID application provisioning.
   - **Restart provisioning**: Resets provisioning and starts over synchronization.

User authentication in the licensed application

After a user is assigned to a license, they activate the license seat by authenticating before using Power PDF Advanced or Power PDF Business for Mac for the first time.

The following authentication methods are available:

- Tungsten ID
- Microsoft Entra ID
- Google
- Apple ID

If you synchronize users from Entra ID, the other authentication methods become unavailable.

For detailed steps for user authentication in Power PDF Advanced, refer to *Network Installation Guide*.