Conceptualizing the deployment of the cloud based 3DEXPERIENCE for Academia R2016x level
Executive Summary

The power of the 3DEXPERIENCE platform opens a broad set of organizational and creation methods. Institutions which purchased the platform will unleash this innovation power in its full extend after they understand how to associate the platform’s capabilities with the work processes that they want to enable.

To guide such institutions in the initial determination of the optimal architecture of their 3DEXPERIENCE platform, the Global Academia team produced and delivered this white paper.

It will provide users with a global overview and understanding of the platform’s architecture and capabilities in a more technical approach than the promise that triggered them to purchase.

Target audience are typically users who recently purchased the cloud based 3DEXPERIENCE for Academia platform and who wonder what are the optimal initial decisions they have to make about the architecture of their platform, as such initial optimization can provide powerful and long lasting benefits to their implementation.

Please note that this consulting content does not cover in details platform’s installation aspects nor replace trainings or support interactions. It is complementary and will redirect users to existing material.
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Introduction

Along the numerous advantages and flexibility leveraged by the cloud, the 3DEXPERIENCE for Academia is the ideal platform to enhance project based learning by providing an integrated, distributed, collective digital universe for project oriented learning methods such as “Conceive – Design – Implement – Operate” (CDIO ®) “Project (Problem)-based-learning” (PBL®).

To master and get the most of the platform, it is essential to have a good understanding of the overall architecture, administration, and capabilities.

Therefore, the white paper will cover first the academia specific roles & applications package, in addition to the access and installation mechanism, before going into details of the different services composing the platform mainly 3DDashboard, 3DSwym, and 3DSpace. The final section of the white paper will list all the useful resources available online to get help and support.

To know more about the 3DEXPERIENCE for Academia and download the brochure, visit https://academy.3ds.com/en/software/3dexperience-for-academia-on-cloud.

Roles & Applications

The academia platform has a dedicated package for education characterized by the optimization of the number of roles and sizes which facilitates the overall purchase and handling of the platform to fulfill the needs of diverse institutions in secondary and higher education. The portfolio includes 7 compact academic roles and each available in 4 sizes (S, M, L, and XL) for a predefined number of students and storage capacity:

Academia roles:
- Platform Contributor
- 3DEXPERIENCE Essentials
- Design & Engineering
- Systems Engineering
- Architecture & Civil Engineering
- Manufacturing & Production
- Governance and Project Management

Academia package sizes:
- Small (S) – up to 30 users, including 50 GB storage.
- Medium (M) – up to 100 users, including 100 GB storage.
- Large (L) – up to 300 users, including 200 GB storage.
- Extra-large (XL) – up to 900 users, including 400 GB storage.

The applications are a collection triggered by the associated roles and cover the different Dassault Systèmes (DS) brands products available and integrated in a unique and single environment for an advanced multi-disciplinary, social, and collaborative platform on the
cloud. The applications are dispersed along the four quadrants of the compass depending on their classification:

- North quadrant for Social & Collaborative Apps
- West quadrant for 3D Modeling Apps
- South quadrant for Simulation Apps
- East quadrant for Information Intelligence Apps

To learn more on academia specific Roles & Applications, visit the “Available Products” section [https://academy.3ds.com/en/software/3dexperience-for-academia-on-cloud](https://academy.3ds.com/en/software/3dexperience-for-academia-on-cloud).

On the other hand, the academia platform has the particularity to be protected by a watermarking mechanism to prevent academic institutions from becoming subcontractors to industry. Therefore, academic data can't be imported into a commercial server, but commercial data may be imported into an academic server as this might be of interest for academic institutions working on topics submitted by industry.

Nevertheless, a commercial customer participating in an academic project has the possibility to connect to the school's server, but the school can't connect on a commercial server.

Below is a figure summarizing the watermarking mechanism:
To access the cloud based 3DEXPERIENCE for Academia platform, an internet connection is required along a valid DS Passport username and password. Access is through a unique URL address https://eu1-academia-ifwe.3dexperience.3ds.com.

Note that bandwidth and latency tests shall be performed following the procedure described here; as DS reserves the right not provide support services for latency above 120 milliseconds, and/or if the available bandwidth is below 2 Mbytes/sec between customer’s location of access of the DS offering and DS’s data center.

Once logged into the platform, applications can be divided into two categories: Web apps and Native apps. The former ones require only a web browser; the latter ones require the download and installation of a native client on the user machine mainly for 3D design modeling, manufacturing, and simulation computation applications.

To ensure your material is certified to get technical support, visit http://www.3ds.com/support/certified-hardware/.

For prerequisites checks, first steps to the 3DEXPERIENCE platform and native apps installation, visit http://www.3ds.com/support/new-customer/cloud-support/.

For a detailed step-by-step documentation on installation and getting started with 3DEXPERIENCE for academia, refer to the document “Boot your 3DEXPERIENCE” on the 3DS Academy website https://academy.3ds.com/en/software/3dexperience-for-academia-on-cloud.
Architecture & Capabilities

To get the most of the platform capabilities, it is essential to have a good overview and understanding of the platform’s architecture in addition to the relationship between the different integrated services for an optimized organization and long lasting implementation benefits.

A good approach is to have a flat view representation of the platform services including the ones reserved for administrators as shown in the below figure.

![Figure 3: Platform Architecture Overview](image)

Such a representation enhances user’s comprehension of the overall platform and eases the navigation with the objective of preventing confusion by being able to identify at a glance the context in which he’s working in.

For instance, if a user is facing difficulties or issues with some content, it is crucial for him to know if the content is at the level of the 3DDashboard, 3DSwym or 3DSpace. In that way, it will be easier for him to find the accurate solution by navigating efficiently among the numerous existing DS material online, or even get a more substantial help from support.

A hint is to have a look and check what is displayed at the top left section of the platform as illustrated in the following figure:

![Figure 4: Context Identification](image)
The hereafter sections will go in details throughout the different services and capabilities composing the 3DEXPERIENCE for Academia platform based on the platform overview representation figure.

In Learn Online, a course entitled “Gateway to the 3DEXPERIENCE platform” is available to get user started on the 3DEXPERIENCE platform by imparting the basic skills required to use it for his day-to-day activities: https://academy.3ds.com/en/learn-online.

1. Platform Management

Platform management services are triggered by the “Platform Manager” role reserved for administrators. The administrator rights are granted automatically to the first person who logs in by clicking on the link received by the email sent to initialize the platform for the very first time. Also, all users invited to join the platform with “Admin” user rights are also assigned the “Platform Manager” role.

All administration services are now grouped and can be easily accessed and controlled from the default predefined dashboard “Platform Manager”.

User can be administrator of several platforms and must take this behavior into account when managing settings, members, roles and apps of each of them. If several platforms available, administrator can easily switch from one platform to another. Note that switching platform occurs at the level of the “Platform Manager” dashboard by selecting “Manage Dashboards” functionality or from the arrow of an app launch.
In education, the platform management services are usually handled by educators, IT responsible of the institutions, or even teaching assistants.

More information on Platform Management is available here. A detailed description on Platform Manager widget is available here.

### 1.1. Members & Roles

Platform members are invited to join the platform by email but before sending the invitations, administrators should assign user rights and academia roles. Massive import is available with the tab “Batch invite”. Here are the details of the user rights available on the platform level:

- **Admin:**
  - Access platform management services, create 3DSwym communities, and monitor 3DSpace collaborative spaces.
  - Default access to the 3DSpace « Common Space » and public 3DSwym community « Getting Started ».

- **Member:**
  - Default access to the 3DSpace « Common Space » and public 3DSwym community « Getting Started ».
  - Create community content (posts, medias, ideas…) if appropriate 3DSwym roles assigned.
  - Create collaborative spaces if creation rights allowed from 3DSpace Control Center.

- **Member Contractor:**
NO default access to the 3DSpace «Common Space» or the public 3DSwym community «Getting Started».

- Note: Admins can manually grant the above privileges to contractors if needed.

- Create community content (posts, medias, ideas…) if appropriate 3DSwym roles assigned.

- Create collaborative spaces if creation rights allowed from 3DSpace Control Center.

In education, a practical recommendation is to invite students as “Contractor” as not to give them default access to neither the common space nor the Getting Started community. Such user rights assignment will have no impact on their assigned roles in 3DDashboard, 3DSwym, or 3DSpace.

For more information on Members & Roles, click here. Detailed steps are also available in the following document “Boot your 3DEXPERIENCE”.

**Figure 7:** Platform Management – Members & Roles

### 1.2. Platform Information

The “Platform Information” includes the following sections:

- “About” tab to display the Name and unique ID of the platform purchased in addition to the Disk usage; with the ability to change the name of the platform.
• “Legal” tab to implement your corporate Terms of Use and Privacy Policy Statements. The platform members will be asked to read and approve those documents the first time they log-in.

• “Settings” tab to activate/deactivate 3DMessaging, to set some roles management settings, and provide the path of installation files that are shared with all the members to minimize the download time for native apps installation.

Figure 8: Platform Management – Platform Information (About & Legal)

Figure 9: Platform Management – Platform Information (Settings)
1.3. Communities Management

The “Communities Management” tab of the “Platform Manager” dashboard refers to “3DSwym Control Center” app to access and customize the settings of all the communities of the platform in one place:

- What’s New for pending requests, report abuse management, community and content moderation mode.
- Communities to list all available communities and create new ones.
- Administrators to display administrator list and add new administrators.
- Media Processing to list the details of the different medias and their status.
- Analytics for statistics on number of communities, contents, comments, surveys…
- Settings to customize features, maximum media file size for uploading, idea status management, and community types.

For detailed description of the above, click here.

![Figure 10: Platform Management – Communities Management](image)

1.4. Content Management

The “Content Management” tab of the “Platform Manager” dashboard refers to the “3DSpace Control Center” to manage ownership, creation rights and settings of collaborative spaces:

- List of all collaborative spaces and ability to change the main owner.
- Allow/Deny creation rights for platform members.
- Switch on/off new users deployment and notifications settings.
In Learn Online, a course entitled “3DEXPERIENCE Open Cloud Essentials” is available to guide user through the main items of the administration of a cloud environment. Here’s the link to access the learning materials: https://academy.3ds.com/en/learn-online.

2. 3DDashboard Management

All platform members, regardless of their platform user rights, have access to “Manage Dashboards” in order to control all aspects of their personal dashboards: Add, rename, delete, share, and add members.

Dashboards are user dependent and available on all the platforms on which user is invited.
2.1. Dashboards

A dashboard is a holistic view on any topic, or activity, gathering content from various sources. A default dashboard “My first Dashboard” is available for all members joining the platform and covers mainly 3DEXPERIENCE Platform news and getting started tips.

Members can enrich the existing dashboard, and/or create new personalized dashboards.
2.2. Members & Roles

Users can be invited to be part of a synchronized dashboard from Manage Dashboards. The available roles are:

- **Owner**:
  - Ability to edit content, rename, duplicate, share, and delete dashboards.
  - Ability to modify roles and add members.

- **Reader**:
  - Read only rights.

The dashboard shared using this mode is an instance of your dashboard. If any instance is updated by anyone having Owner rights, everyone will get the updates.

2.3. Content

The content of a dashboard is made of tabs, and tabs contain several types of widgets: Webpage reader, feed reader, quick links, 3DSwym news, 3DPlay...

Predefined widgets can display content from the internet or from the 3EXPERIENCE platform: Google news, 3DSwym news, project business status and schedule, 3DSpace collaborative spaces...

Users can easily edit the layout of the tabs, configure widgets and add them to dashboards by drag & drop. Also, a copy of dashboards and tabs can be shared by e-mail to users or by generating a public link to anyone.
In academic context, educators can create and share dashboards with students in order to inspire, provide guidelines, best practices, dashboards templates & samples. Students can also create and share dashboards with educators to share their work progress, and provide project updates. Owner shares dashboards by adding members with “Reader” role.

For an illustration on how to use 3DDashboard for project-based-learning (PBL) approach and replicate such content, check the presentation on 3DS Academy website https://academy.3ds.com/en/lab/project-based-learning-3dexperience; and watch the step-by-step tutorials on 3DS Academy YouTube channel https://www.youtube.com/watch?v=8TFWIUigNvY&list=PLe0EJN9Fts8usTpdsoUiuQyED90qw1xZ&index=2.

3. 3DSwym Management

The “3DSwym Control Center” and “3DSwym Platform” apps are reserved for administrators whereas the other 3DSwym related apps are available to all platform users. Selecting “3DSwym Management” from 3DSwym home button or launching the above mentioned apps is the same; which is also equivalent to “Communities Management” of the “Platform Manager” dashboard.

“3DSwym Management” functionality provides administrators an easy way to manage communities, users, page personalization and communities’ statistics as follows:

- Community creation and deletion, adding/editing/removing community types, community’s settings & joining requests, statistics...
- Massive import mode for users in communities and users removal, export list of community users, and moderation mode activation.
Moderation mode is a higher level of administration rights granted by platform administrator allowing to perform some specific administration tasks and access any type of content which is not owned. This mode is deactivated automatically after 1 hour.

For detailed information on 3DSwym administration, click here. For detailed information on 3DSwym capabilities, click here.
3.1. Communities

3DSwym communities are efficient to share and innovate throughout internal and/or external ecosystems. Users join communities to learn from other users and share knowledge using contributions and comments grouped by expertise, activity or interest. It will engage users with social contributions and participate with others community’s members to increase innovation. An integrated 3DMessaging is also available for members to chat and interact instantaneously.

![Figure 18: 3DSwym – Communities Overview](image)

3.2. Members & Roles

Platform users can be added to a community with one of the following 3DSwym roles:

- **Author:**
  - Create, read, update and delete content.

- **Owner:**
  - Add members, read, add, edit and delete page, change privacy, grant access, lock, reorganize, change status of an idea.

- **Contributor:**
  - Read access to the community content, and ability to post iQuestions, Wiki, Ideas, and comment on content.
3.3. Content

Different types of content can be added in 3DSwym communities to create and share knowledge with other users: Posts, Media, iQuestions, Ideas, Wiki pages, Surveys, Comments & Endorsement.

- Medias to enrich Posts, iQuestions, Ideas, Wiki Pages and also comments: image, videos, 3D Model....
- iQuestions to ask questions and receive collaborative replies.
- Ideas to go beyond posts for they can be assessed by other users.
- Wiki pages to share knowledge and best practices.
- Surveys to collect community members’ feedback.
- Comments to interact with other community members on any item.
- Endorsements to show your support to content that you feel adds value to the community.
In academic context, communities can be created for collaborative projects, courses, departments, or even at the global institution level. General visibility settings can be selected among public, private, secret depending on the needs.

4. 3DSpace Management

The “3DSpace Control Central” app is reserved for administrators whereas “3DSpace” and “3DSpace News” apps are available for all users independent of their user rights:

- “3DSpace Control Center” to manage ownership, creation rights and settings of collaborative spaces.
- “3DSpace” to display & create collaborative spaces and manage content, members, properties and analytics.
- “3DSpace News” to display a collaborative space’s content news.

For detailed information on 3DSpace management and capabilities, click here.
4.1. Collaborative Spaces

The 3DSpace app is used to create collaborative spaces. A collaborative space is an environment in which data content is created and shared with other members depending on the visibility settings of the collaborative space and the maturity state of the data.

- **Private collaborative space:**
  - Content is NOT visible to users logged onto any other collaborative space, irrespective of the maturity status of the content.

- **Protected collaborative space:**
  - Content owned by a protected collaborative space is visible to users logged onto any other collaborative space only if the maturity status of the content is RELEASED or OBSOLETE.

- **Public collaborative space:**
  - Content owned by a public collaborative space, irrespective of the maturity status of the content, is visible to users logged onto that collaborative space and any other collaborative space.

Below is a figure summarizing the data visibility based on type of collaborative spaces and data maturity states:
4.2. Members & Roles

Platform users can be added to a collaborative space as members with one of the following rights:

- **Contributor:**
  - Read access to content.
- **Author:**
  - Create and edit content.
- **Leader & Owner:**
  - Manage members of a collaborative space, create, share and edit content.

Owner of the collaborative space can also edit roles and remove members. The main owner of a collaborative space still has more privileges than members with owner role.

For detailed information on collaborative spaces and access roles, click here.

4.3. Content

The content of a collaborative space is composed of all types of objects created in the database with the traditional apps involving CATIA, ENOVIA, SIMULIA, and DELMIA; such
as Part Design, Assembly Design, Composites Design, Folder, Project Management, Collaboration & Approvals, Durability Validation, Process Planning, etc…

The mentioned applications allow creation of the different objects types you are already familiar with from V5 or V6 versions; such as Physical Product, 3DPart, 3DShape, RFLP, Project Space, Folder, Document, etc….

Figure 24: 3DSpace – Content

The design objects created inside a collaborative space could have the following maturity states:

- **Under Owner Design (PRIVATE):**
  - Content is only accessible to the owner and no longer shared inside the collaborative space community.

- **Under Global Design (IN_WORK):**
  - Content fully modifiable and can be deleted.

- **Design Frozen (FROZEN):**
  - Content waiting for approval, or to keep an intermediate state of the design.
  - Content can be switched back and forth without any versioning.

- **Design Released (RELEASED):**
  - Content ready for production and cannot be modified anymore.
  - Content cannot be deleted and can only be switched to Obsolete.

- **Obsolete Design (OBSOLETE):**
  - Content concerns objects which are no longer valid.
  - Content cannot be promoted nor deleted.

Detailed description on maturity states is available [here](#). The content lifecycle is illustrated in the below figure:
When working with collaborative spaces, it is vital for the user to make sure he’s connected to the appropriate one in order to prevent data creation in a wrong collaborative space which could have a significant impact on data visibility by platform members.

For that, a hint is to always check from the “Home” button of a web app or a native app the collaborative space selected. Then, the user can switch collaborative space by selecting the appropriate credentials as shown in the below figure: Collaborative space and Role.

Figure 26: 3DSpace – Credentials

In academic context, we can think of different use cases based on collaborative spaces types and roles. For instance, the “Private” collaborative spaces can be used for exams, individual projects, and group projects:

- 1 private collaborative space per student for individual projects and exams:
  - Students having Leader & Owner role on their collaborative space.
  - Differentiation can be made with the naming of the collaborative space.
  - Educators can be added to the collaborative spaces with Contributor role in order to access the data in RELEASED state and correct exams, projects...

- 1 private collaborative space per group of students for collaborative projects:
  - Students having Leader & Owner role.
  - Students of the same group project added to the same collaborative space.

The “Protected” collaborative spaces can be used for sharing data courses, exams, and projects with platform members once data released:

- 1 protected collaborative space per course, educator, or department.
- Members of the collaborative spaces to be assigned Leader & Owner role.
- Students not to be added to the protected collaborative spaces.
- Content to remain private and not visible to students as long as the owner did not change the maturity state to RELEASED or OBSOLETE:
  - Educators can work and prepare their courses and exams privately; then content to be released when material is ready or on the exam date.
  - Students, content owner, and other members won’t be able to modify the content once released.
The “Public” collaborative spaces can be used for sharing courses, libraries, catalogs, exams and projects with all platform members:

- 1 public collaborative space per course, educator, or department.
- Members of the collaborative spaces to be assigned Leader & Owner role.
- Students not to be added to the public collaborative spaces.
- All Content will be visible and public even if it’s still in INWORK maturity state.

Here is another illustration of collaborative spaces architecture in case of group team projects involving same data set (i.e LEGO parts).

- All students of group projects will be able to access and use the LEGO parts provided by educators to create a new LEGO structure (Car, Plane, Boat…) inside their private collaborative space.
- Data of each Group Project collaborative space will not be visible to other members, hence preventing cheating.

![Diagram of 3D collaborative spaces](image-url)  
*Figure 27: 3DSpace – Architecture example*
Getting Help

In this section, you will find all useful information involving the different DS online material and toolset available for users to get help and find the appropriate solutions to their queries:

- Communities to join the world of DS users’ communities and exchange with your peers and get supported: [http://www.3ds.com/support/users-communities/](http://www.3ds.com/support/users-communities/)
  - 3DEXPERIENCE platform on cloud community
  - ENOVIA on cloud community
  - CATIA on cloud community
- Knowledge base to search and find up-to-date technical knowledge: [https://www.3ds.com/support/knowledge-base/](https://www.3ds.com/support/knowledge-base/).
- User’s guide documentation: [http://www.3ds.com/?id=1853](http://www.3ds.com/?id=1853).
- Program directory documentation which provides additional information to the user’s guide: [http://www.3ds.com/support/documentation/program-directories/](http://www.3ds.com/support/documentation/program-directories/).
- Cloud Support page which gathers in one place all resources: Quick start, useful resources, and cloud support information. [http://www.3ds.com/support/new-customer/cloud-support/](http://www.3ds.com/support/new-customer/cloud-support/).
  - Troubleshooting section to get supported and report a problem: [http://www.3ds.com/?id=24290#c1424098#c1423339](http://www.3ds.com/?id=24290#c1424098#c1423339).
  - FAQ & Glossary for how to submit a request and much more: [http://www.3ds.com/support/new-customer/faq-glossary/#c1181612](http://www.3ds.com/support/new-customer/faq-glossary/#c1181612).