Introduction (intro)

The SBAM system is designed to manage customer agreements (contracts) for online services. The primary intent is to combine the required information that is needed to determine if a user has access to a product (service) at any point in time.

The key components of any agreement are:

- The institution that is paying for the services
- The list of institutions (sites) that are receiving the services
- The list of products and subscription dates
- The authentication methods that identify visitors

The authentication and customer information is exported nightly to the affected system(s) which are then able to provide access to the appropriate products to qualified customers.

This browser based application will allow a user to maintain this information.

Online Help (OnlineHelp)

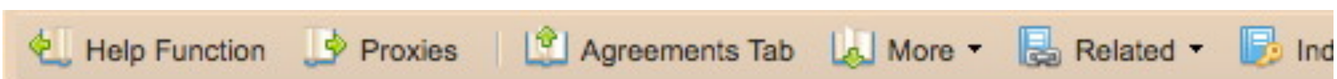
Online help is available from virtually every portlet, tab or grid.

To access the help on any particular function, locate and click on the help icon on the right side of the portet/tab/grid header bar.

To access the help feature starting from the introduction click on the help icon at the bottom of the Navigation Panel (on the left side of the Agreements area).

A new help portlet,/tab or dialog box will open to let you browse all of the help contents, starting with the page that is relevant to the area in which you clicked the help icon.

The help pages have extensive navigation tools to assist you. The upper toolbar provides methods of navigating through the document.



The next page and previous page buttons allow you to advance and retreat one page in the current section. The up button will let you go up one level in the hierarchy of documents. The more drop down menu will let you see pages offering more detail within the current section. The related drop down menu will let you jump to other, related sections.

The index button will take you to an index of all help contents. You can expand or collapse sections, and click on any page name to jump to that page.

The bottom toolbar provides browser-like navigation, letting you go backwards or forwards through your current history of viewed pages, or to jump to the first or last page viewed. Note that the index is not included in this history.

General Concepts and Functions (GeneralConcepts)

This section discusses the general concepts and functions inherent in the SBAM system. Some of these have to do with the nature of the subject of the system (i.e. online authentication) while others have to do with features of the system itself.

Log In (LogIn)

Every user is given a user ID and password.

Each user is assigned a role which governs those tasks that can be performed with that user ID. Administrator level users have the capability to create and change user IDs and roles, and to reset passwords.

Each individual user can also change his or her own password using the Profile tab.

A user can log out by pressing the log out button in the upper left corner of the screen.

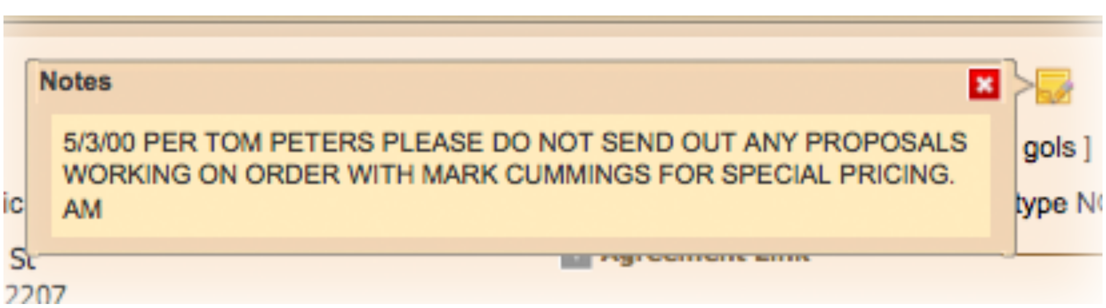
Object Notes (ObjectNotes)

Individual objects (such as agreements or sites) within the system can have notes attached to them.

When an object can have a note added the panel will include the add note icon. To add a new note, click the icon.

When an object already has a note, the panel will include the edit note icon. To edit the note, click the icon. To remove the note, edit it and delete all of the text on the note.

You can view the contents of the note by hovering over the edit note icon. After the note pops up, to close it click the red close X.



When an object in a grid has a note attached, the note icon will appear in the grid.

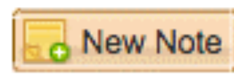
32839	600079039	Ps 154 Jonathan D Hyatt School		edg
35840	600015839	Arlington Public Schools		gols
38398	600005934	Kingston School District		edg

The content of the note can normally be viewed in a grid presentation of the data by clicking on the note icon.

32839	600079039	Ps 154 Jonathan D Hyatt School		edg
35840	600015839	Arlington Public Schools		gols
Note: 5/3/00 PER TOM PETERS PLEASE DO NOT SEND OUT ANY PROPOSALS WORKING ON ORDER WI SPECIAL PRICING. AM				
38398	600005934	Kingston School District		edg

Private User Notes (PrivateUserNotes)

Individual objects (such as agreements or sites) within the system can have notes attached to them, but the system also provides a capability to allow a user to create private notes using the New Note button in the upper right corner of the browser window.

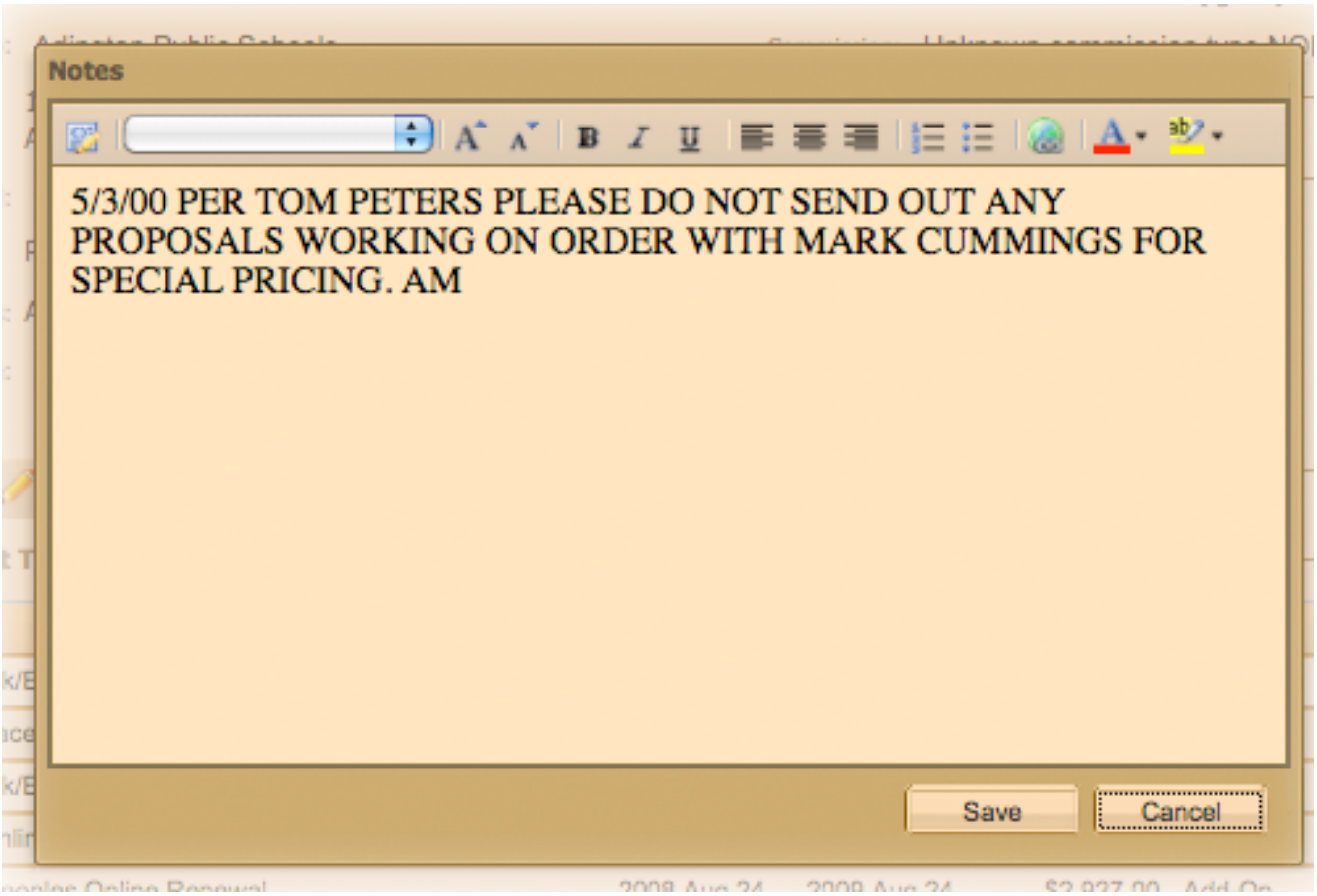


Application notes remain on the browser window regardless of navigation through the application. Like computer windows, they can be collapsed or minimized. To edit the content of a note, use

Editing Notes (EditingNotes)

To edit any note the edit window will be displayed. You can edit the text of the note, select text, and apply formatting in a way that is similar to any word processor. A user may specify a fond, font size, bold, italics, underline, text justification, bulleted/numbered lists, embed links, or change the font color or background color.

To save changes, click the save button. To cancel any changes, click the cancel button.

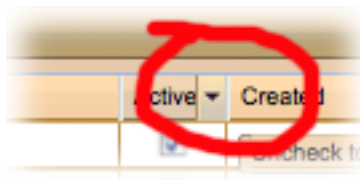


Grids (Grids)

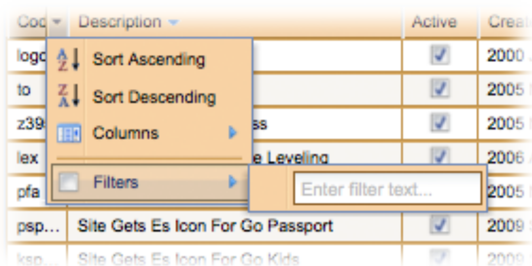
Grids are commonly used to display several rows of data. Almost all grids have the same basic functionality (although in special cases, certain functions may be unavailable, or additional functions may be included).

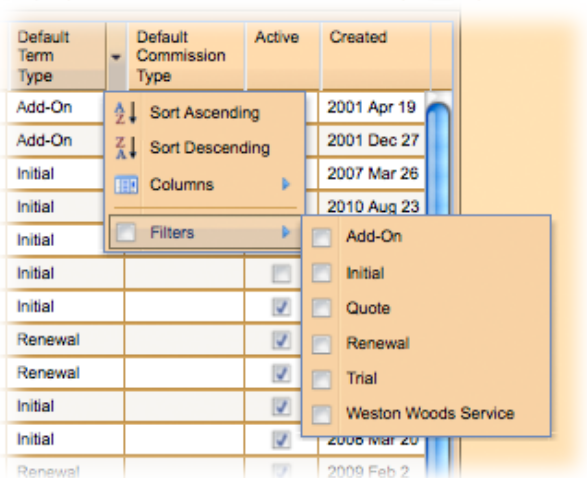
Code	Description	Active	Created	Seq
plug	Plug-Ins Allowed?	✓	2000 Jul 20	0
adv	Advertising Accepted?	✓	2000 Jul 20	1
logo	Use Special Logo?	✓	2000 Jul 20	2
email	Allow Users To E-Mail Articles?	✓	2001 Mar 28	3

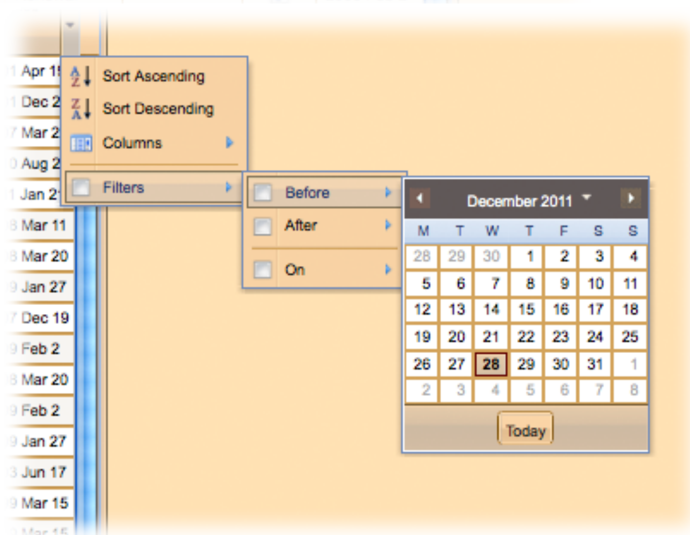
Any grid can be re-sorted by any column by clicking on the heading for that column. There are also special functions that can be found by hovering the cursor over the right side of any column header and clicking on the disclosure triangle that appears.



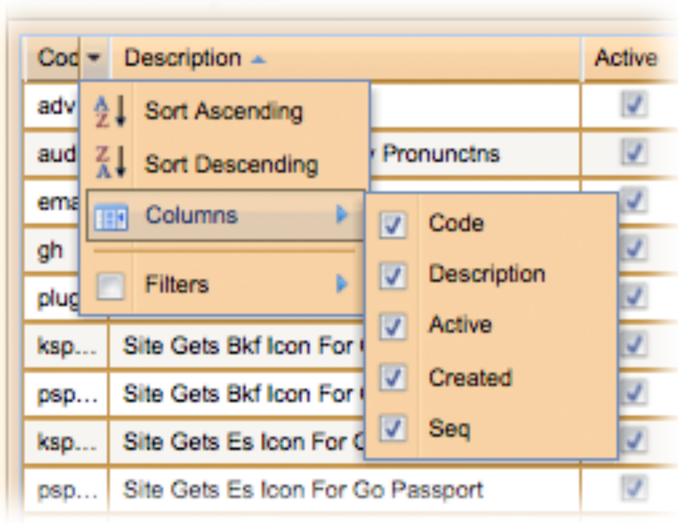
Grids can be ‘filtered’ to find and display only certain rows by clicking on the disclosure triangle for that column, hovering over filters, and then either clicking any check boxes or entering a filter value or selecting a filter date.







You can also change the columns displayed within a grid by right clicking any heading, moving down to "Columns" and checking or un-checking whichever columns you wish to view. In some cases, there may be additional columns that are not normally displayed that can be seen by using this method.



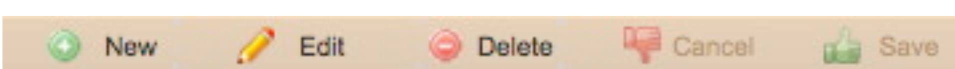
Editing Data (EditData)

For the majority of the application, data is displayed in grids.

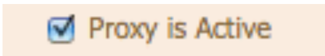
32839	600079039	Ps 154 Jonathan D Hyatt School		edg
35840	600015839	Arlington Public Schools		gols
38398	600005934	Kingston School District		edg

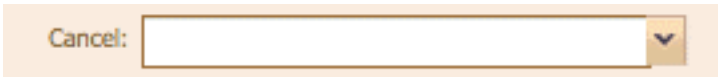
In most cases, to select a row to edit click on that row. The data will usually open in a display panel above the grid. You can collapse and expand this area manually using the collapse tool in the upper right corner of the panel.

When the panel is expanded you can use the New button to create a new entry, the Edit button to alter a selected entry, and in some (but not all) cases the Delete button to delete an entry.

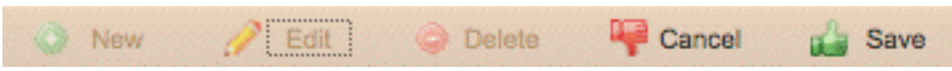


If there is no Delete button available for an element then you must instead edit the entry and uncheck the “status active” box or select a Delete Reason or Cancel Reason from a drop down menu.

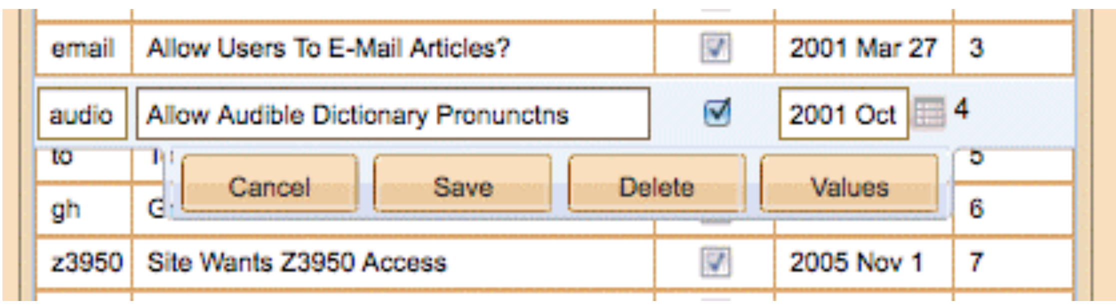




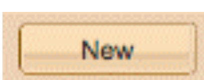
In the case of editing an entry, after you have made your changes you must click the Save button. You can cancel your changes and revert to the previous values by clicking the Cancel button.



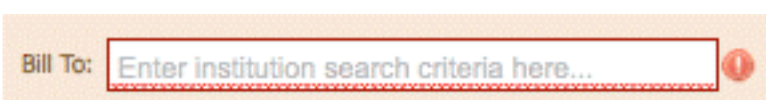
Some elements in the Configuration Tab grids are edited directly in the grid. Clicking on the row itself will allow you to edit the values right in the row. To save or cancel the changes you must click on the Save or Cancel button. Such rows may also have a Delete button and optionally additional buttons to perform additional functions for view other data associated with the row.



To create a new entry in such a grid, use the New button at the bottom of the grid.



When a field is in error, an error icon will be displayed, the field will be underlined in red, and you will not be able to Save any changes.



Hover over the error icon with the mouse to see a more clear description of the problem.

User Types (UserTypes)

There are four types of users. Each user is given system capabilities according to their role.

Standard	This user type is given standard agreement maintenance capabilities.
Standard Plus	This user type has all of the capabilities of a standard user, but can also maintain configuration data through the configuration tab.
Administrative	This user type has all of the capabilities of a standard plus user, but can also maintain users and perform other administrative level functions.
Analyst	This user type only has the ability to view and query data.

User type assignments are managed by any administrative user through the Administration tab.

Elements of the Data (DataElements)

The primary component of the system is the **Agreement**. Each agreement marries together various components which are used to generate and export the authentication data that controls access to the products managed by SBAM.

Agreements are associated with **Institutions**. Each agreement is associated with an institution that is paying for the service, as well as a list of sites that are receiving the service.

Contacts can be associated with an institution and with a specific agreement, to aid in communication with the relevant parties in setting up and managing the agreement.

A **Site** (or **Site Location**) identifies a specific location within an institution that is receiving online services. Normally, the "main" location is all that is needed and used, but if necessary other locations can be identified and isolated within an institution.

A site may have an associated list of **Preferences.** These preferences can be used to fine tune the behavior of products at each individual site (for instance, by turning audio on or off, or adding a customized logo image).

Each agreement is governed primarily by the existence of **Product Terms** which identify the date ranges (the term) and the products (the list of services) that define the delivery terms for the agreement..

Each agreement is also governed by a list of **Access Methods** that the authentication process can use to determine which web visitors will be associated with which sites.. There are three types of access methods:

- IP Addresses (or address ranges)
- User Names and Passwords
- Referrer URLs

User names with passwords may also be further restricted by associating them with a **Proxy**. A proxy is further restricted by a list of IP Address ranges, so that in such a case the user must not only supply the user ID and password, but also use it within the specified block of proxy IP address ranges.

Similar to but separate from Access Methods are **Remote Setup URLs**. A remote setup url declares a page from which individual users can create their own user IDs and passwords (outside of the SBAM system) for their personal use from home.

Agreements can also be related to **Links**, which are abstract entities used to group agreements for reporting, searching or tracking purposes.

Agreements (Agreements)

Each agreement represents, in concept, a contract with a customer. In practice, separate contracts may be merged together into a single agreement or a single contract might be split into separate agreements in order to simplify management of the data.

Attached to each agreement are:

- The institution paying for the services
- The institutions (sites) receiving the services
- The products and dates for which those products are active
- Authentication methods that identify customers of this agreement when accessing products through the Internet

Also attached to an agreement may be:

- Contact information
- Sites
- Product Terms
- Access Methods
- Remote Setup URLs

Agreements may be grouped together by **Links**, simple entities created exclusively for the purpose of grouping agreements.

Field	Description
Agreement	The number that identifies this agreement.
Bill To	The institution that will "own" and pay for the service.
Status	Whether or not the agreement is active, inactive or deleted.
Delete Reason	A reason for deleting the agreement. Configurable under the Configuration tab.
Current Value	The dollar value of all currently active product terms on the agreement.
Type	An arbitrary classification of the agreement for reporting purposes. Configurable under the Configuration tab.
Commission Type	An arbitrary classification of the agreement for commission reporting purposes. Configurable under the Configuration tab
Agreement Link	An entity used to join related agreements for search and reporting purposes.
Buildings	The number of buildings that the agreement supports (for informational purposes only)
Population	The population that the agreement supports (for informational purposes only)
Enrollment	The student enrollment that the agreement supports (for informational purposes only)
Workstations	The number of workstations the agreement supports (for

	informational purposes only)

Institutions,Sites,ProductTerms,AccessMethods,RemoteSetupUrls,Contacts

Institutions (Institutions)

Institutions are the customer entities that subscribe to online services, either by paying for or receiving services (or both).

Customers are considered a special class of institution in SBAM terminology; a "customer" is any institution that has ever had an SBAM agreement.

Note that institutions cannot be created or maintained through SBAM. All maintenance is performed indirectly, through TMS through the CDB. Institutions in SBAM itself are only updated as a result of periodic imports from TMS which is in turn fed from the CDB.

Sites (Sites)

A site (or **Site Location**) is a location within an institution. Every site can be considered to have, by default, a **main** location. Additional locations can be created for the express purpose of assigning distinct **Site Preferences** to each site. Contacts may also be associated with a particular site (presumably primarily for technical issue resolution).

A location is identified by the UCN to which it belongs and a unique location code. Each location is also given a description.

SitePreferences

Site Preferences (SitePreferences)

Preferences allow online products to customize their behavior when accessed by different sites. A Site may declare preferences based on the defined **Preference Categories** and their allowed **Preference Codes**.

Examples of preferences include turning audio on or off, multi-media on or off, selecting an interface style, providing Z2335 search support, or including a custom logo image on delivered pages.

PreferenceCodes,Sites

Preference Codes (PreferenceCodes)

The Configuration Tab can be used to define new preference categories and the valid preference codes within each category. A site may choose a single preference code from each preference category to control site behavior.

It is also possible to define a preference category without a choice of codes. In this case, any value may be entered (free format) as the selection for that category for a Site. This allows, for example, the specification of a special logo image file name for inclusion on delivered web pages.

SitePreferences

Product Terms (ProductTerms)

The product terms are among the most important aspects of an agreement. Each product term specifies a term (a date range) and a **Product** (which in turn identifies a list of **Services**) to be available to all sites on the agreement for the specified term.

For a product term to be active, it must include a start, end and termination date, as well as an active product. The **start date** determines the date on which delivery will begin. The **end date** represents the scheduled end of the delivered service, but it does not impact actual delivery. The **termination date** determines the date on which the service will stop being delivered.

Product terms can be canceled by adding a **cancelation reason** to the product term, through the passing of the termination date, or by making a product itself inactive (in which case all product terms for that product will also become inactive).

Field	Description
Agreement	The agreement to which this product term belongs.
Product	The product (and by inference the services) to be activated during this term. Configurable under the Configuration tab.
Value	The dollar value of this product term.
Commission Type	The commission type to be used for commission reporting purposes for this product term. Configurable under the Configuration tab.
Reference	An unqualified, un-validated reference ID, such as to an OTC order number, related agreement ID, or any other value.
PO #	The PO number used by the customer to order this service.
Group	An arbitrary value used to group together related but distinct product terms on this agreement for reporting or analysis purposes.
Cancel Reason	If a product term is canceled for any reason other than the fact that the period has expired, this reason provides an explanation. Configurable under the Configuration tab.
Start Date	The first date on which the service will start to be accessible to the customer.
End Date	The last date on which the service is scheduled to be accessible to the customer.
Terminate Date	The last date on which service will actually be accessible to the customer. Note that this date can be set prior to the end date, to terminate service prematurely, or later than the end date, to provide the user with a grace period prior to renewing the service.
Term Type	A grouping for the product term which will impact delivery Possible values are use managed, but include:

	• Initial – a first time service • Renewal – a renewal of a previously purchased service • Add-on – an incremental (not major) service • Trial – a service delivered for a free trial period only • Quote – an entry created to track a possible purchase, but that does not result in actual access Configurable under the Configuration tab.

Products (Products)

A product within the SBAM system is merely an arbitrary grouping of **Services**. Services are the actual online "product" that a customer can purchase. Products in SBAM are more like packages. How these products are established is entirely up to the users. They are purely an abstract convenience for data management and reporting purposes.

Field	Description
Code	A unique code that identifies the product.
Description	A description of the product.
Short Name	An abbreviated description of the product.
Default Term Type	The term type to first apply to a product term created to use the product. Configurable under the Configuration tab.
Default Commission Type	The commission type to first apply to a product term created to use the product. Configurable under the Configuration tab.
Active	Whether or not product terms for this product should be included in an export or reports. Deactivating a product effectively deletes it.
Date Created	The date on which this product was first created.

Services (Services)

A service within the SBAM system is an actual, individual web service that must be separately accessed by and authenticated for a user. Each service will result in the inclusion of a specific marker in the data exported to authentication systems for service activation for a customer, for their specified set of access methods.

Each service is identified by a unique service code.

A service must also be identified by an export code that will be included in the authentication output. This code need not be the same as the service code, and will be defined by (provided by) the authentication system.

An export file field is provided but is now obsolete. This field may be ignored.

A service should have a service type code associated with it. This code is used for reporting purposes, to segregate services of different types.

Field	Description
Code	A unique code that identifies the service within SBAM.
Description	A description of the product.
Export Value	The code which identifies the service to the authentication system.
Service Type	The type of service for reporting purposes (Initial or Add-on). Not configurable.
Export File	Obsolete value used for old authentication export.
Active	Whether or not the service should still be delivered for authentication.
Date Created	The date on which this service was first created.

Access Methods (AccessMethods)

Access methods are used to restrict access to products and to associate a product/service-site visitor with an institution, agreements, and their active product terms.

In a nutshell, when a web visitor accesses a site, the authentication system there is able to compare their access information to the access methods defined in the SBAM system, from that to determine which agreements apply, and from that to determine which product services a customer is eligible to receive, and with what site preferences.

There are three main types of access methods:

- IP Addresses
- User IDs (with passwords)
- Referrer URLs

Any access method can be (optionally) associated with a specific institution site on the agreement. An access method without an associate will be by default associated with the main location of the sold to institution on the agreement.

Three separate statuses are set for an authentication method.

A method must be both **approved** and **validated** to be included in an authentication export (i.e. used by a customer for access). In addition, any associated site must also be active.

A User ID may also be set as **remote**. A remote access method identifies **CLARIFY THIS**.

IP Addresses

IP addresses are the most straightforward method of authentication. If it can be determined that the client computers will always (and exclusively) access the system through a predefined set of IP addresses, then the use of IP addresses will avoid the need for the user to know and enter a user ID and password, either once on each client computer, or once each time a session is initiated.

This method is the most secure since IP addresses cannot be spoofed, and the service cannot possibly be used from another location.

An IP address is represented by a single value or a range of values. A range may also be represented by a wildcard. This is the simplest form of authentication, with no further options.

User IDs

A user ID is associated with an entire school (institution, or site), not an individual. As such, the same user ID and password may (and would) be entered from multiple computers throughout the institution. These may be saved as cookies on the client computer so that a new user accessing product services through that computer need not know the user ID and password.

User IDs are less secure than IP addresses since a user ID could be entered through a computer outside of the subscribing institution, and can be passed from person to person.

A user ID will have a type, “permanent” or “cookie.” In reality, both methods use cookies to store the user name and password, and the “permanent” password is actually more temporary. When a cookie type UID is set, it will be stored on the client’s computer as a permanent cookie. For a “permanent” UID a session cookie is used, so that a future log in will require that the UID and password initially be supplied through form fields.

A UID can be further restricted by association with a **Proxy**. When a customer institution makes use of a proxy service it is impossible to identify them by IP, since they will share a block of IP addresses with other institutions and users making use of the proxy. It is, however, possible to at least guarantee that the use of an assigned UID originates from within the block of IP addresses used by the proxy.

To accomplish this, ranges of IP addresses are associated with the Proxy (a separate entity) and the proxy itself is associated with a particular UID.

Referrer URLs

A referrer URL can be used in any case where a school hosts its own server that can only be accessed from within the school network. In this case, the user can set up an access page on a serer within the customer's network, with a link to a product service page. By checking and confirming the referrer URL included in the URL request for that page, a user request can be associated with a customer institution and agreement.

Remote Setup URLs (RemoteSetupUrls)

A remote setup url references a web page hosted by the customer school which provides a secure link to a facility through which a user at the school can sign up for their own personal user ID, which can in turn be used from any location (usually from home).

Contacts (Contacts)

Contact information is kept for individuals or departments purely for the sake of simplifying the many tasks involved in activating, repairing or renewing access for an agreement. No restrictions are made on contact information, and contacts can be associated with institutions, site locations within an institution, or agreements.

Proxies (Proxies)

A proxy within the SBAM system represents a service to which a customer institution or site location may subscribe which in turn masks their actual IP address range. This type of user may be assigned a user ID and password combination that may be further restricted by assigning it to a proxy.

Each proxy is associated with a list of IP addresses. By associating a user ID with a proxy, that user ID is then only valid when used with an IP address listed for the proxy.

Proxies are identified by an ID number and a description. Arbitrary "search keys" may also be added to a proxy to make them easier to find.

Field	Description
Proxy ID	A unique number that identifies the proxy within SBAM.
Description	A description of the proxy.
Search Keys	Any set of values that may be used to search for the proxy (in addition to the description and number).
IP Addresses	A list of IP addresses or address ranges that are governed by the proxy.

Links (Links)

A link in the SBAM system is an artificial construct used solely to relate associated agreements. The association is entirely arbitrary, and only one link can be assigned to any agreement.

A link is identified by an ID number and an assigned institution (the owner of the link). More than one link can be created for an owning institution.

Links are also assigned types (for reporting and analysis purposes).

Field	**Description**
Link ID	A unique number that identifies the link within SBAM.
Institution	The institution to which the link is assigned (its "owner").
Link Type	The type of link. Configurable under the Configuration tab.
Status	Whether or not the link is active.

Features and Functions (FeaturesFunctions)

The application is divided into six main areas, accessible through tabs near the top of the screen:

- The Welcome Tab
- The Agreements Tab
- The Configuration Tab
- The Reports Tab
- The Administration Tab
- The Profile Tab

Welcome Tab (WelcomeTab)

The Welcome Tab provides messages to users pertaining to system changes, availability and management and scheduling.

A user with Administrator capability can manager welcome messages through the Administration tab.

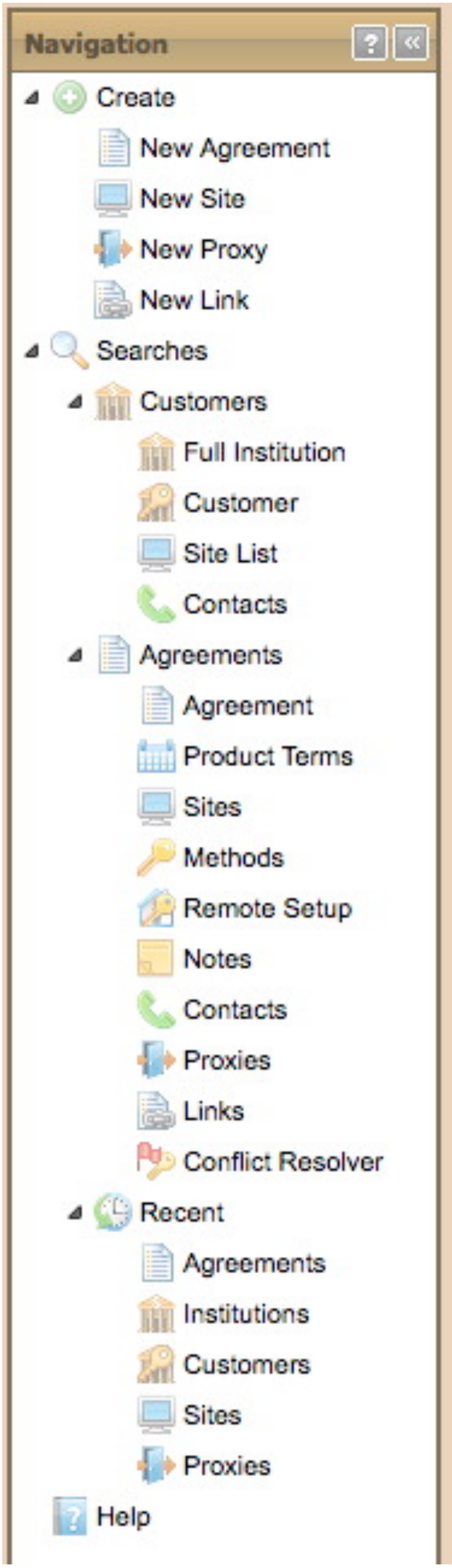
Agreements Tab (AgreementsTab)

The Agreements Tab is the main application work area. This is the area where most users will spend their time maintaining agreements and authentication data.

The content layout of the Agreements Tab will vary depending on the size of the user's monitor. Most users will see a tabbed layout with a navigation panel at the left. When a selection is made in the navigation panel, a new tab will open for that function.

Users with larger monitors may be given a portal/portlet layout. In this case new functions will open as mini-windows in the portal area. Users may relocate and resize these portlets as needed.

Navigation Panel (NavPanel)



Within the Agreements Tab the Navigation Panel at the left provides access to all available functions.

It is divided into three main areas:

- Create Functions

  These functions allow a user to create new elements (agreements, proxies, etc.).

- Search Functions

  These functions allow a user to search for and open existing elements.

The Search Functions are further subdivided into three subsections:

- Customers

  These functions search for customers and the agreements associated with those customers.

- Agreements

  These functions search for agreements directly based on the contents of those agreements.

- Recent Objects

  These functions allow access to customers or agreements which have recently been accessed by this user.

To access a function, click on it. This will open a new panel (tab or portlet) with which to perform the function.

NOTE: Agreements and some similar functions can only be opened once. Attempts to open the agreement a second time will simply redirect you to the already open tab or portlet For most search functions it is possible to open multiple copies of that same function. The exact behavior depends on the particular function.

Create Functions (CreateFunctions)

The Create functions can be used to create any of the four main elements of the system:

- Agreements
- Sites
- Proxies
- Links

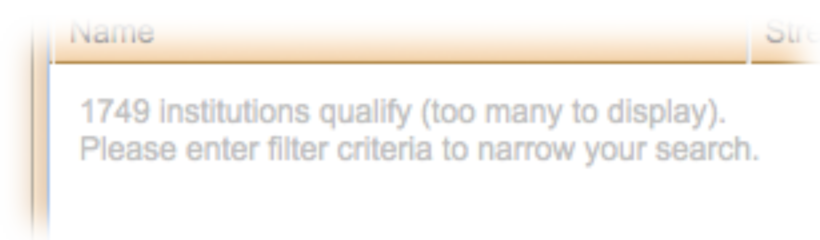
Note that sites, proxies and links can also be created while working within an agreement, and agreements can be created after searching for and finding an institution.

Search Functions (SearchFunctions)

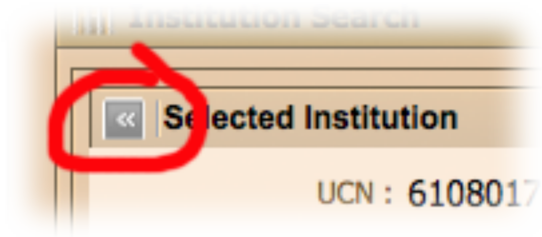
The Search Functions allow the user to locate institutions/customers), agreements, sites and proxies using a variety of criteria.

These functions are divided into two groups by *target* – the element which will be found (customers or agreements). In each case different criteria are used to locate targets. In almost all cases entry of data is simply free format. For instance, to search for institutions simply enter *any* value or combination of values from the institution name or address. To search for institutions by contact simply enter any value or combination of values from the contact's name, address, phone numbers, e-mail addresses or notes.

Search functions are designed to be intuitive and general so that a user can enter likely values. When a search is not well enough constrained (i.e. too many results qualify), the user will see a dim message to that effect:



Continue to enter further criteria to narrow the results to a reasonable number. When few enough results qualify, they will be displayed in the grid. Click on any result to switch to a panel to view more details for that entry, or to access buttons (at the bottom of the panel) to open (and possibly edit) the entry in a new tab or portlet. To return to the search view click on the return icon near the upper left corner of the panel:



Customer Search Functions

Full Institution	This search will find any institution in the system using name/address information.
Customer	This search will find any institution that is already a customer in the SBAM system (i.e. is either a bill to or site on an agreement).
Site List	This search will find any site (i.e. an institution that is receiving SBAM product services).
Contacts	This search will find any institution based on contact information (e.g. a contact's name or phone number). Note that this search does not find the contacts, but rather the institution to which the contact belongs.

Agreement Search Functions

Agreement	Search for agreements by agreement ID.
Product Terms	Search for agreements by product and term dates.
Sites	Search for agreements by site name or address.
Methods	Search for agreements by IP address, user ID, password or referrer URL.
Remote Setup	Search for agreements by Remote Setup URL.
Notes	Search for agreements by the contents of any associated notes.
Contacts	Search for agreements by contact information (name, phone, etc.)
Proxies	Search for agreements by Proxy ID.
Links	Search for agreements by Link ID.
Conflict Resolver	Search for access methods and proxy IPs by IP, user ID, password or URL, and evaluate conflicts.

Recent Access Functions (RecentAccess)

The recent access functions allow a user to see those agreements or institutions which he or she has recently accessed. These functions are user specific. They show the items accessed by that particular user and no others.

Recent access functions are available for:

Agreements
Institutions

Customers (institutions with existing agreements)
Sites (institutions listed on agreements to receive services)
Proxies

Agreements;Institutions;Customers;Sites;Proxies

Help Function (HelpFunction)

The Help function provides access to the same help facility (*these* help pages) that can be accessed using the help icons in the header of each panel or grid.

For more information refer to the Online Help page (use the “Related” drop down menu above to jump to that page).

OnlineHelp

Agreements (AgreementDisplay)

Each agreement acts as a main container for all of the related elements: sites, product terms and access methods.

Use the Agreement Panel to create or edit agreements and all of their related contents.

To create a new agreement, you may:

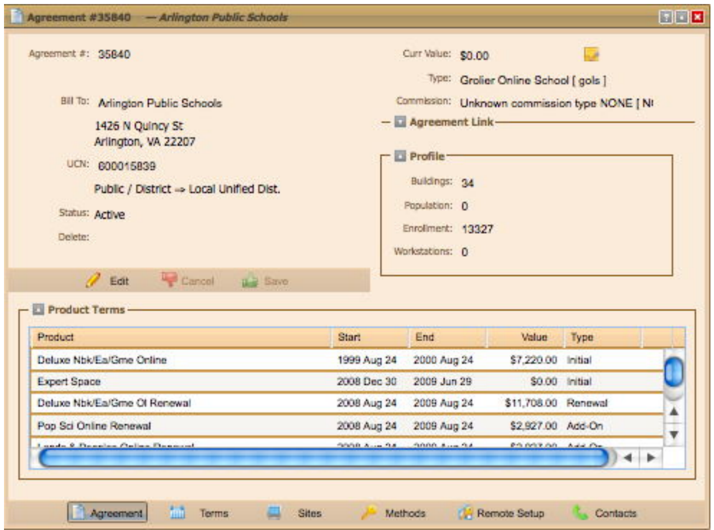
- Click on the New Agreement link in the left navigation panel.
- Search for an institution using any of the available searches, and click the “New Agreement” button to create an agreement sold to that institution.

You can also find and open a portlet for any existing agreement using the wide variety of search portlets available.

Each new agreement will be assigned a unique agreement ID once it is saved in the system.

Note: Valid agreement IDs will include a check digit to help prevent confusion between agreements with similar sequential IDs.

A valid agreement also needs to have an associated “sold to” institution – the institution that will be paying for the services. Note that this institution will not necessarily be a recipient of the products on the agreement, but it may be.



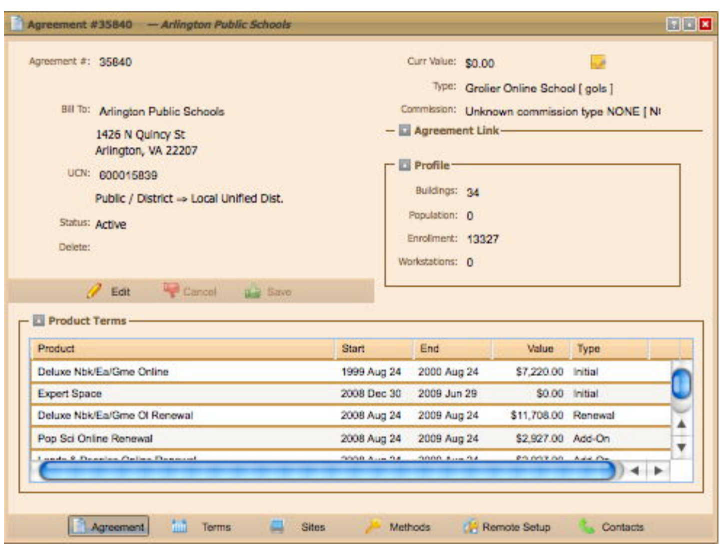
To view or edit the various components of an agreement, use the **tool bar** along the bottom of the panel to select the element to be managed.

The Product Terms grid displays the terms. To edit the terms, either click on a term in the grid or else click the Terms button. Either action will take you to the terms panel.

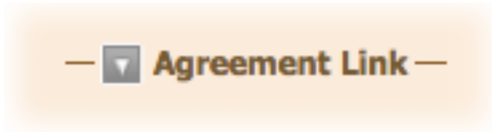
Agreements;Institutions

Agreement Panel (AgreementPanel)

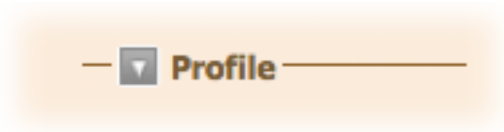
The Agreement Panel is used to create, view or modify an agreement.



To show or add Agreement Link information click on the disclosure triangle 



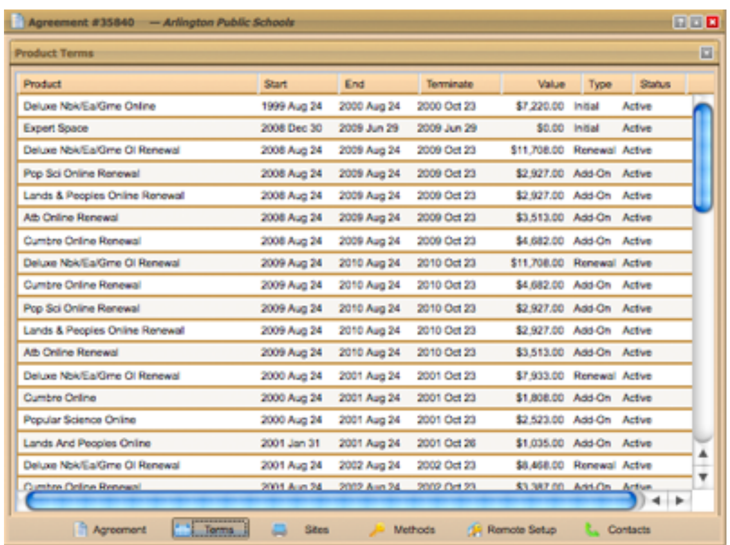
Similarly, to show or edit the Profile information click on the disclosure triangle.



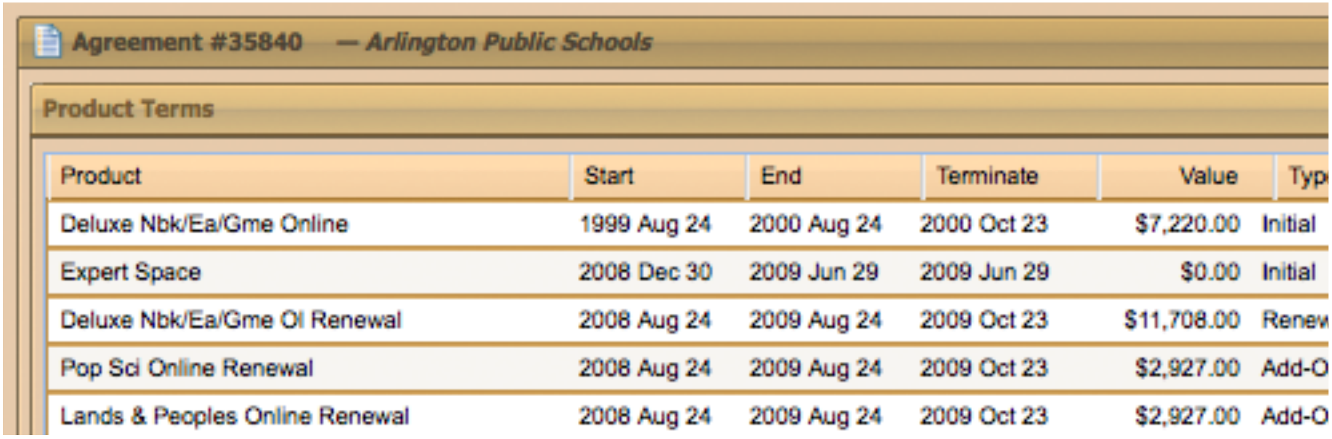
Terms Panel (AgreementTermsCard)

The Terms Panel is used to create, view or modify individual product terms for an agreement.

Initially (unless a specific term was selected to activate the panel), the entire area of the panel will be used to display a grid of existing product terms. A particular term can be selected and display by clicking on the row. This will expand the edit panel to allow you to modify the term.



Alternately (for instance, to create a new term), you can manually open the edit panel by clicking on the disclosure triangle in the upper right corner.

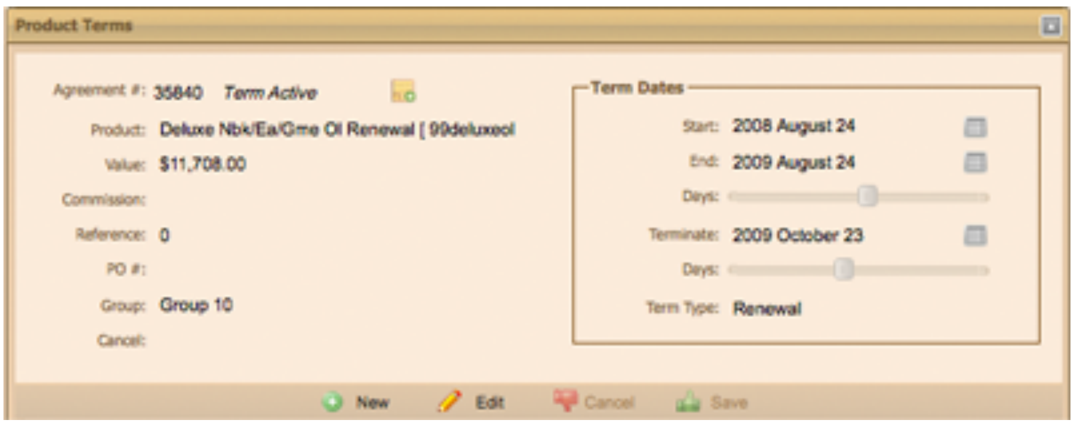


Agreement #35840 — Arlington Public Schools

Product Terms

Product	Start	End	Terminate	Value	Typ
Deluxe Nbk/Ea/Gme Online	1999 Aug 24	2000 Aug 24	2000 Oct 23	$7,220.00	Initial
Expert Space	2008 Dec 30	2009 Jun 29	2009 Jun 29	$0.00	Initial
Deluxe Nbk/Ea/Gme Ol Renewal	2008 Aug 24	2009 Aug 24	2009 Oct 23	$11,708.00	Renew
Pop Sci Online Renewal	2008 Aug 24	2009 Aug 24	2009 Oct 23	$2,927.00	Add-O
Lands & Peoples Online Renewal	2008 Aug 24	2009 Aug 24	2009 Oct 23	$2,927.00	Add-O

When the term edit panel is displayed you may create a new product term for this agreement by clicking New. To edit an existing term, click Edit. You cannot delete a term, only inactivate it.



Each term must have a product. All other values are optional, but the term will not become active until it also has a start, end and terminate date, and a term type, and does not have a cancel reason.

To cancel a term, select a cancel reason or change the terminate date to a date which has already passed. To un-cancel the term, remove the cancel reason and/or alter the terminate date to a date in the future.

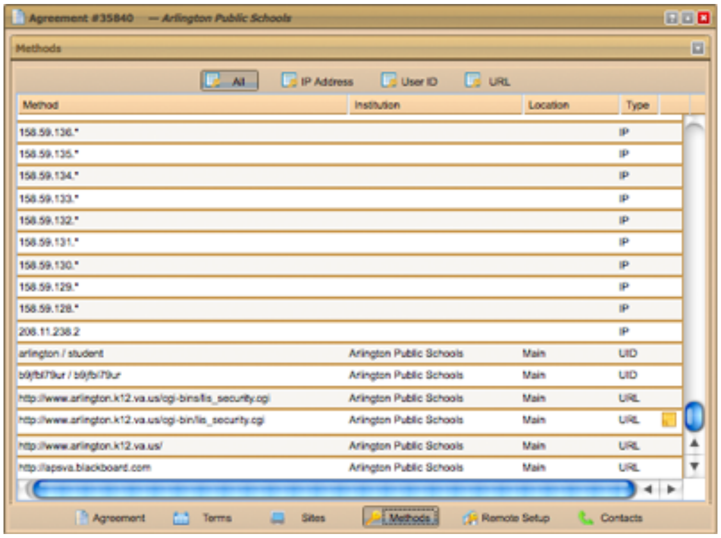
Dates may be entered by typing a date directly into a date field or by clicking on the calendar icon . The end and terminate dates may also be changed by dragging the appropriate slider handle to adjust the date to a specific number of days after the start date (for an end date) or end date (for a terminate date).

ProductTerms;Products;Services

Access Methods Panel (AgreementMethodsCard)

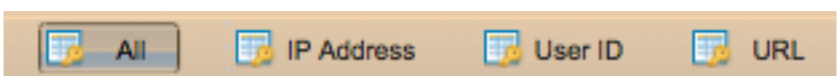
The Access Methods panel is used to create, view or edit the various access methods that give any site on an agreement access to an active product service.

Initially (unless a specific method was selected to activate the panel), the entire area of the panel will be used to display a grid of existing access methods. A particular method can be selected and display by clicking on the row.   This will expand the edit panel to allow you to modify the method.

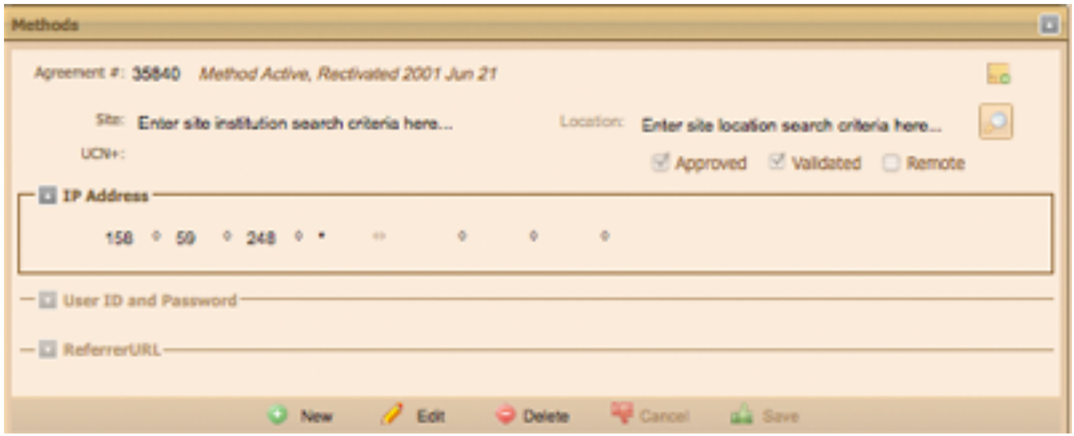


Alternately (for instance, to create a new term), you can manually open the edit panel by clicking on the disclosure triangle  in the upper right corner.

Because an agreement can include so many different access methods, this grid can be filtered to show only the methods of a particular type by clicking the appropriate filter button above the grid.



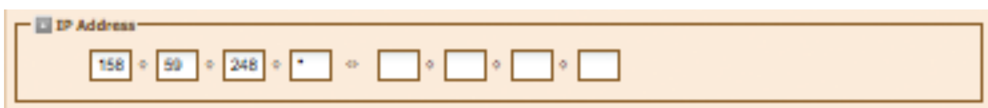
When the methods edit panel is displayed you may create a new access method for this agreement by clicking New. To edit an existing access method, click Edit. You delete a method by clicking Delete, which will completely remove it from the agreement. It is also possible to instead deactivate it by un-checking the approved or validated check boxes, leaving the method in place but removing it from the authentication process for this agreement only.



Every method must be associated with a site location. If a site location is not explicitly declared for an access method it will be assumed to be associated with the main location for the institution specified on the agreement as a whole.

Different areas of the edit panel are visible depending on the type of method being edited. For a new method, it is possible to use the disclosure triangles  to open the area that pertains to the type of method being created.

IP Addresses



An IP address is divided into 4 octets. A range is represented by two separate IP addresses.

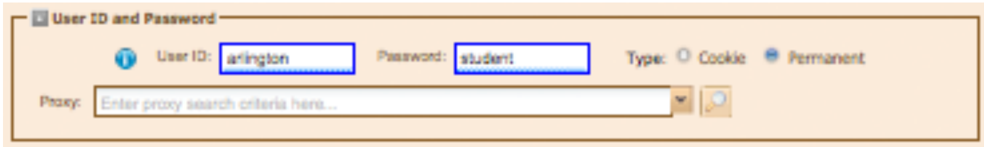
For an IP address, you must enter a starting IP address. You may at any point after the first octet enter a wildcard asterisk (*) to mean "all addresses in this range."

If you do not use a wildcard character you may enter an ending IP address. This will activate all IPs in the range from the start to the end.

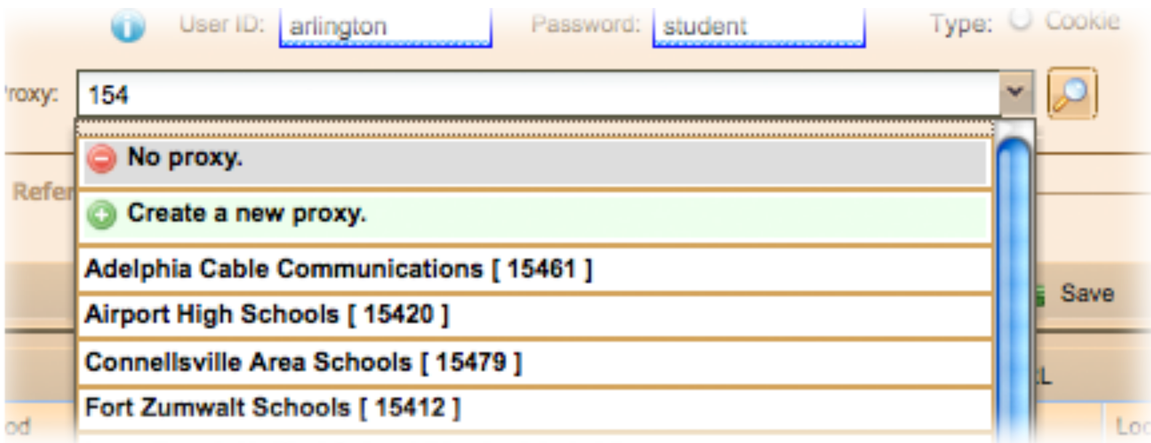
As a convenience, when first entering an ending range, you can tab to the first octet that will be different and begin typing there. The system will fill in the preceding blank octets.

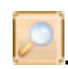
User IDs

A user ID (or UID) requires an ID, a password, and a type. A UID may optionally also be assigned to a proxy.



To select a proxy, enter search criteria in the field and then select from the available candidates, or else select the "Create a new proxy" entry in the drop down list that allows you to create a new proxy from here. To remove a proxy from the UID, select "No Proxy."

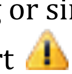


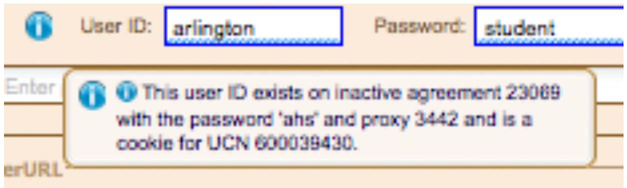
You may open a selected proxy by clicking on the "view" widget icon .

Referrer URLs

A referrer URL requires only a URL. A URL must begin with http:// or https://.

Conflicts

Whenever a conflict exists for overlapping or similar methods within an agreement or between agreements an alert  or information icon  will be displayed. You can hover over the icon to see details on the conflicts, to help determine what the proper course of action may be. The Method Conflict Resolver panel may be of use in resolving complex issues.



AccessMethods;AgreementConflictResolver

Sites Panel (AgreementSitesCard)

The Agreement Sites Panel allows a user to add or deactivate sites on an agreement. Sites must be added to an agreement to allow that agreement's product terms to apply to the site.

Sites cannot be deleted from an agreement. To deactivate a site (i.e. change it so that it is no longer receiving the services) one must either set a cancel reason on the agreement site or deactivate all authentication methods (a tedious and error-prone approach).

Note that a cancel reason applies to the association of the institution as a site on the agreement. It does not affect the institution as a whole or its standing on other agreements.

Institutions;Sites

Agreement Contacts Panel (AgreementContactsCard)

The Agreement Contacts Panel is used to associate a contact with an agreement. A contact must also be associated with exactly one institution, but they may be explicitly associated with any number of agreements for easy reference.

Note that if you change the institution associated with a contact through the Agreement Contacts Panel, this will affect the contact everywhere. The association to the institution is for the contact, not for the assignment within the agreement.

Contacts

Remote Setup URLs Panel (AgreementRemoteSetupCard)

The Remote Setup URLs Panel lists and maintains the Remote Setup URLs associated with an agreement. Like access methods assigned to an agreement, a remote setup URL can be associated with a particular institution and location at that site, or they can be assumed to belong to the bill to institution on the agreement.

RemoteSetupUrls

Proxies (ProxyDisplay)

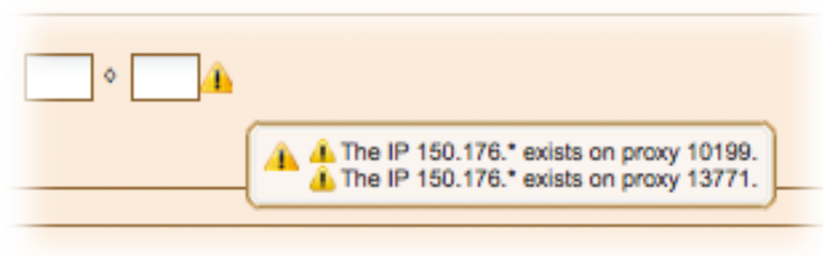
The Proxies Panel maintains proxy definitions and the IP addresses associated with a proxy.

To modify the proxy itself (its name, search keys, or its status) click on the "Edit" button.

To add an IP address or range to the proxy, click on the "New IP Address" button.

To modify an existing IP address or range, click on the IP address in the grid.

Note that like Access Methods, IP addresses on proxies are automatically scanned for conflicts with other proxies or agreements. Whenever a conflict exists for overlapping or similar methods within an agreement or between agreements an alert or information icon will be displayed. You can hover over the icon to see details on the conflicts, to help determine what the proper course of action may be. The Method Conflict Resolver panel may be of use in resolving complex issues.



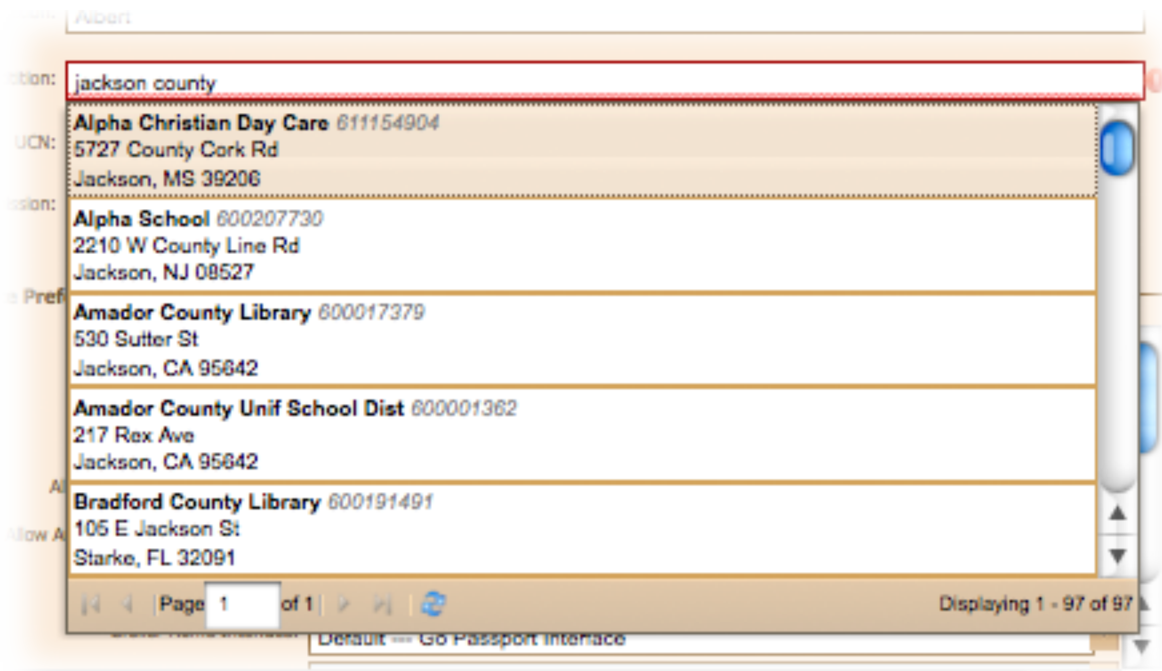
Proxies;AgreementConflictResolver

Site Locations (SiteLocationDisplay)

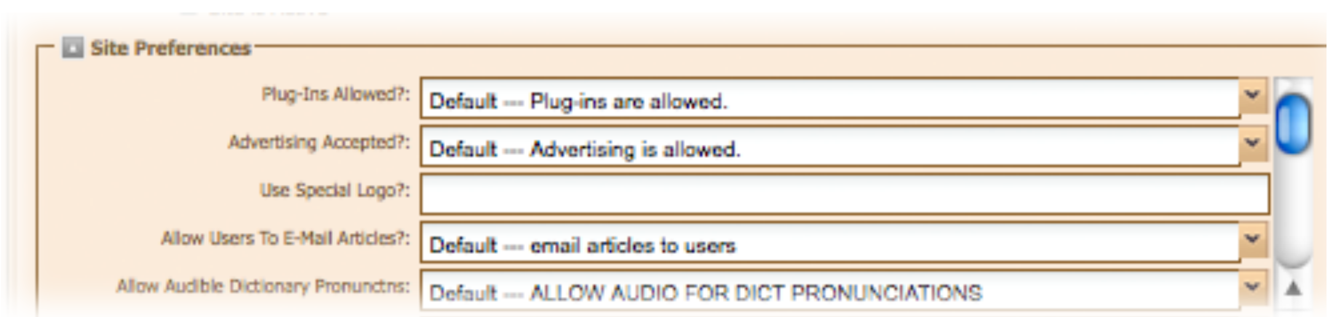
The Site Locations Panel maintains individual locations at an institution.

To create a location, you must specify the code, description and the institution to which it belongs.

To find an institution, enter any search criteria into the institution field and select an institution from the dropdown menu.



You can also view and maintain the preferences for the site location. These preferences affect how services are delivered at the recipient site location. Valid preferences are maintained in the Configuration Tab.



Sites;PreferenceCodes;PreferenceCategoryEditGrid;PreferenceCodeEditGrid

Agreement Links (AgreementLinkDisplay)

The Agreement Links Panel allows you to maintain agreement links.

AgreementLinks

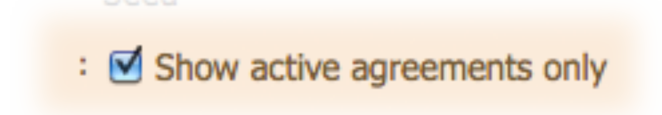
Institution Search (InstitutionSearch)

The Institution Search will find *institutions*. Enter any data from the address for an institution, including the UCN or parent UCN.

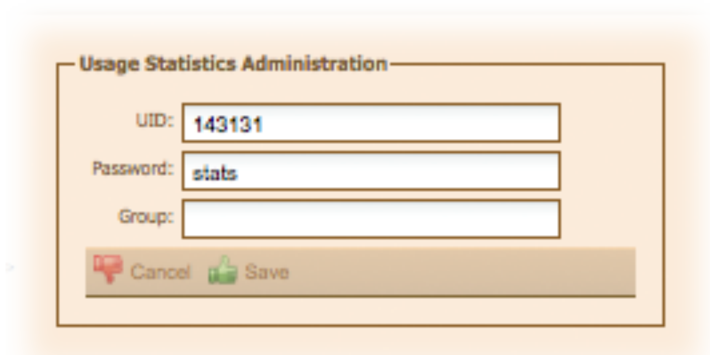
After clicking on an institution to display, you will also see any currently active agreements for that institution as either a bill to or a site.

You can create a new agreement by clicking on the "New Agreement" button. You can view, edit or create contacts for this institution by clicking on the "Contacts" button.

You may uncheck the "active agreements" box to see all agreements. You may click on an agreement to open that agreement in a new tab or portlet.



You may also edit the Usage Statistics administration (user ID, password, and aggregation code) information for an institution.



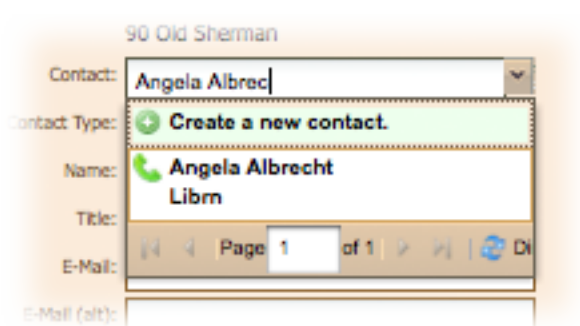
SearchFunctions;Institutions;Contacts

Contact Edit (InstitutionContactsCard)

The contact edit screen allows a user to create or edit contacts. To edit an existing contact, select it from the grid. To create a new contact click "New."

When creating a new contact, select "Create a new contact" from the Contact drop down menu.

You may instead type in search criteria for the contact, and select a name from the list. <u>This will move that contact to this institution</u> if you save the change (and the contact had previously been associated with a different institution).



InstitutionSearch;Contacts

Customer Institution Search (CustomerSearch)

The Customer Search will find *institutions* which appear on agreements (active or inactive) as either the bill to or a recipient site. Enter any data from the address for a customer, including the UCN or parent UCN.

For more information, refer to the Institution Search help.

SearchFunctions;Institutions

Site Institution Search (SiteInstitutionSearch)

The Site Institution Search will find *institutions* which appear on agreements (active or inactive) as a recipient site. Enter any data from the address for a site, including the UCN or parent UCN.

When you click on an institution, instead of being presented with the agreements associated with the institution, you will see a list of the individual site locations at the institution. Every such institution will have a "main" location.

Click on a location to maintain that location. You can use the "New Site Location" button to create a new location for this institution.

For more information, refer to the Institution Search help.

SearchFunctions;Institutions;Sites

Institution Contact Search (InstitutionContactSearch)

The Institution Search will find *institutions* using name and address data for a contact for that institution. Enter any data from the name, address, email or phone numbers or notes for the contact.

SearchFunctions;Institutions;Contacts

Agreement Search (AgreementSearch)

Use the Agreement Search to locate an agreement by any one or combination of:

Agreement ID
Bill UCN
Link ID
Agreement Type
Agreement Notes

Other search functions are available for finding agreements using other values.

In particular, to locate an agreement for an institution by institution name or address, use the Institution Search to find the institution, click on it, and then select the agreement from the grid displayed for that institution.

SearchFunctions;Agreements

Agreement Product Terms Search (AgreementTermSearch)

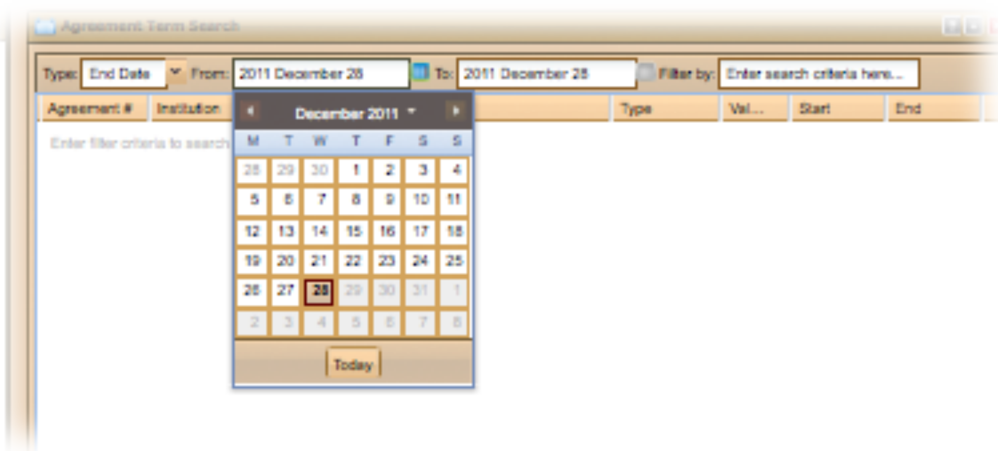
The Agreement Term Search will find *agreements* based on data from product terms on the agreement.

A date can be specified by selecting a date type (start, end or terminate) and specifying a date or an inclusive range of dates of that type.

The free format field can also be used to specify an agreement ID, an agreement term dollar value, or text within an agreement term note or a product description or product code.

Note that a date range is *always* required, and the system defaults to the current date for both the from and to dates. Your first step should always be to customize this date range to your needs.

The search does *not* look for enclosed service codes or descriptions.



Note that an Agreement Term search does not find the product terms themselves, but rather uses the terms to find agreements.

SearchFunctions;Agreements;ProductTerms;Products

Agreement Sites Search (AgreementSiteSearch)

The Agreement Sites search will find *agreements* based on the sites for which the agreement will deliver services. Enter any data from the address for a site, including the UCN or parent UCN to find qualifying agreements.

SearchFunctions;Agreements;Sites

Agreement Methods Search (AgreementMethodSearch)

The Agreement Methods Search will find *agreements* based on the access methods associated with agreements. Enter any data from an IP address (whole or part), user ID, password or referrer URL, or from a note on the access method.

SearchFunctions;Agreements;AccessMethods

Agreement Remote Setup URLs Search (AgreementRemoteSetupUrlSearch)

The Agreement Remote Setup URL search will find *agreements* based on the referrer URL itself or any notes on the referrer URL.

SearchFunctions;Agreements;RemoteSetupUrls

Agreement Notes Search (AgreementNotesSearch)

The Agreement Notes search will find *agreements* based on the contents of any note associated with the Agreement or any component of the agreement. There is no need to remember what object the note is attached to, as all notes associated with agreements will be searched, including product terms, sites, access methods, remote setup URLs, contacts, agreement links and the agreement itself.

Note that institution notes are *not* searched.

SearchFunctions;Agreements;ObjectNotes

Agreement Contacts Search (AgreementContactSearch)

The Agreement Contacts search will find *agreements* based on the name, address, email, phone number or notes for a contact associated with an agreement.

Note that this search only applies to contacts associated directly with an agreement, not to contacts associated with an institution which is in turn associated with an agreement (as either the bill to or as a receiving site).

SearchFunctions;Agreements;Contacts

Proxy Search (ProxySearch)

The Proxy Search will find *proxies*. Enter any data from the proxy number, description, or search keys.

Click on the proxy to view the IPs associated with the proxy. Click on “Edit Proxy” to open a tab or portlet in which to edit the proxy.

SearchFunctions;Proxies

Agreement Link Search (AgreementLinkSearch)

The Agreement Link Search will find *agreement links* and through them any associated agreements. Enter any data from the agreement link or the associated institution UCN or name.

Click on the agreement link to view the agreements associated with the link. Click on "Edit Agreement Link " to open a tab or portlet in which to edit the agreement link, or click on an agreement to edit that agreement.

SearchFunctions;Agreements;AccessMethods

Method Conflict Resolver (AgreementConflictResolver)

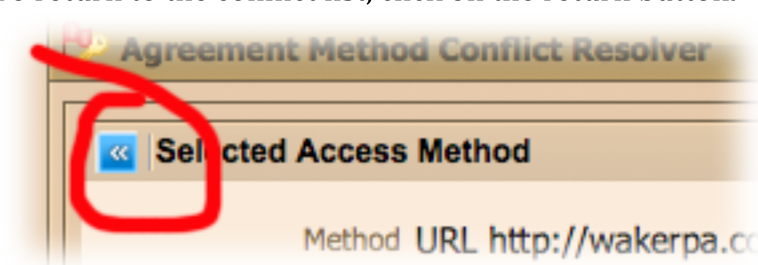
The Method Conflict Resolver helps a user to find Access Methods which are in conflict with each other and so will cause customer activation issues.

To use the Conflict Resolver, enter any search criteria to find Access Methods such as all or part of an IP address, a user ID or password, or part of a referrer or remote setup URL. Each method displayed will show with a red, blue or green flag. Hover the mouse over a flag to see more detailed information on the conflict.

	A green flag means that there are no conflicts.
	A blue flag means that there are other access methods which properly match this one.
	A red flag means that there are serious conflicts which must be resolved, and no guarantee can be made as to which customers and agreements will be authenticated through this access method.

To see the objects (usually agreements) associated with a method, click on the row. To edit the access methods for that object, click on the row for the object.

To return to the conflict list, click on the return button.



SearchFunctions;Agreements;AccessMethods

Recent Agreements (RecentAgreements)

The Recent Agreements grid will list, in chronological order, the agreements last accessed by the current user. Click on an agreement to access it.

RecentAccess;Agreements

Recent Institutions (RecentInstitutions)

The Recent Institutions grid will list, in chronological order, the institutions last accessed by the current user. Click on an institution to access it.

RecentAccess;Institutions

Recent Customers (RecentCustomers)

The Recent Customers grid will list, in chronological order, the customers last accessed by the current user. Click on a customer to access the institution.

RecentAccess;Institutions

Recent Sites (RecentSites)

The Recent Sites grid will list, in chronological order, the sites last accessed by the current user. Click on a site to access the institution.

RecentAccess;Institutions;Sites

Recent Proxies (RecentProxies)

The Recent Proxies grid will list, in chronological order, the proxies last accessed by the current user. Click on a proxy to access it.

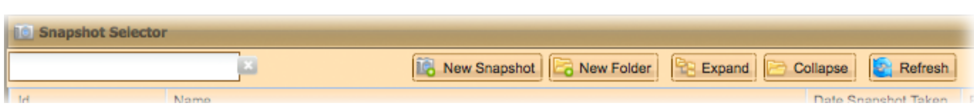
RecentAccess;Proxies

Reports Tab (ReportsTab)

Snapshot Select (SnapshotSelectorCard)

Snapshots capture agreement term data at a specific point in time, using specific selection criteria, to provide reporting based on snapshots.

The snapshot select panel allows a user to create a new snapshot, organize snapshots, or to select the details within a snapshot.



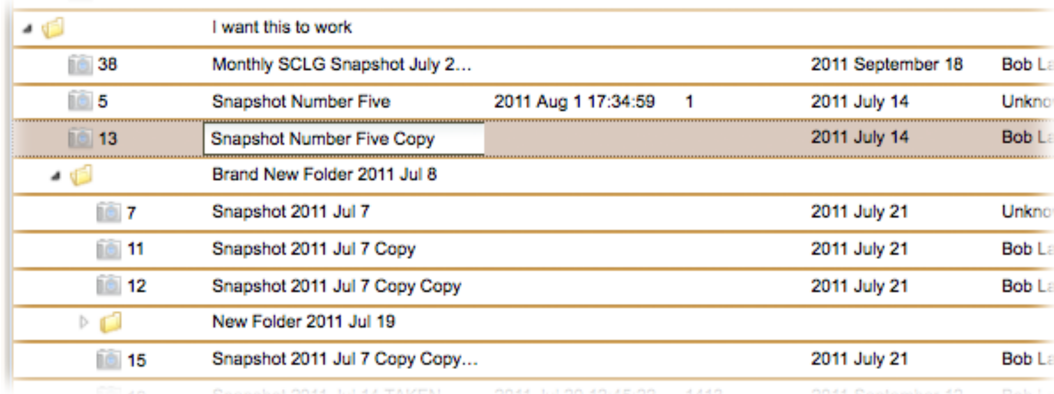
Filter the snapshots displayed by entering any part of a name into the filter box.

Create new snapshots or folders by clicking the “New Snapshot” or “New Folder” buttons.

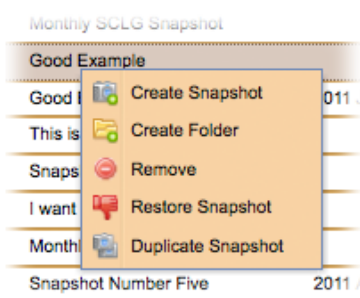
Expand or collapse all folders using the “Expand” and “Collapse” buttons.

A folder or snapshot can be renamed by double clicking on the name.

A folder or snapshot can be moved (reorganized into folders) by dragging.



You can also create snapshots and folders or duplicate snapshots by right clicking on an existing snapshot.



The icons at the right in each row provide access to individual functions for snapshots.

 The Terms Select panel allows you to specify the data to be extracted by product term, including date ranges and other factors. This panel also controls whether data will be grouped by bill to UCN or separated by site UCN.

 The Product Select panel allows you to restrict a snapshot to certain products.

 The Service Select panel allows you to restrict a snapshot to certain services.

 The Customer Select panel allows you to restrict the snapshot to certain customers by state or country.

The Term Report View Data panel allows you to view the data for a snapshot in a sort-able, search-able, sum-able grid. If the snapshot has not yet been taken, it will be taken when this panel is entered.

The Term Report Chart panel allows you to view pie charts or bar graphs of the data for the snapshot. If the snapshot has not yet been taken, it will be taken when this panel is entered.

You can download the data for a snapshot as an Excel spreadsheet by clicking on the Excel icon. If the snapshot has not yet been taken, it will be taken when this panel is entered.

You can enter notes for a snapshot by clicking on the notes icon.

Snapshot Term Select (TermCriteriaCard)

Snapshot Product Select (SnapshotProductSelectTree)

Snapshot Service Select (SnapshotServiceSelectTree)

Snapshot Customer Select (CustomerSelectionCard)

Snapshot Term Report View Data (TermReportViewDataCard)

Snapshot Term Report Chart (TermReportChartCard)

Configuration Tab (ConfigurationTab)

Preference Edit (PreferenceCategoryEditGrid)

The Preference Category Edit will allow a user to maintain preference categories and their associated preference codes. It is accessed through the Preferences tab.

To maintain the Preference Codes assigned to a category, click on the category and then click on the “Values” button.

Grids;EditData;PreferenceCodes;SitePreferences

Preference Code Edit (PreferenceCodeEditGrid)

The Preference Category Edit will allow a user to maintain preference codes associated with a preference category. To access this grid, select a preference category and click the “Values” button.

Grids;EditData;PreferenceCodes;SitePreferences

Service Edit (ServiceEditGrid)

The Service Edit will allow a user to maintain service codes. To assign service codes to products, use the Product Edit function.

Grids;EditData;Services

Product Edit (ProductEditGrid)

The Product Edit will allow a user to maintain product codes. To assign service codes to a product, click on the product and press the “Services” button.

Grids;EditData;Products;Services

Product Service Select (ProductServiceSelectTree)

The Product Service Select will allow a user to maintain the services associated with a product.

To select a service to be associated with a product, check its checkbox. Changes will not take effect unless the “Save” button is pressed.

The tree can be collapsed or expanded by pressing the “Collapse” or “Expand” buttons.

The tree can be reorganized by dragging services or folders as desired. Folders can be created, renamed or removed by right clicking the folder or a spot to insert a new folder. Note that tree organizations are not personal. They will affect all users.

Grids;EditData;Products;Services

Term Type Edit (TermTypeEditGrid)

The Term Type Edit allows a user to maintain the available term types.

Grids;EditData;ProductTerms

Delete Reason Edit (DeleteReasonEditGrid)

The Delete Reason Edit allows a user to maintain Delete Reasons to be associated with agreements.

Grids;EditData

Cancel Reason Edit (CancelReasonEditGrid)

The Cancel Reason Edit allows a user to maintain Cancel Reasons to be associated with agreement product terms.

Grids;EditData

Commission Type Edit (CommissionTypeEditGrid)

The Commission Type Edit allows a user to maintain Commission Types to be associated with agreements and other reported entities.

Grids;EditData

Agreement Type Edit (AgreementTypeEditGrid)

The Agreement Type Edit allows a user to maintain Agreement Types.

Grids;EditData

Contact Type Edit (ContactTypeEditGrid)

The Contact Type Edit allows a user to maintain contact types.

Grids;EditData

Link Type Edit (LinkTypeEditGrid)

The Link Type Edit allows a user to maintain Link Types.

Grids;EditData

Administration Tab (AdministrationTab)

The Administration Tab provides access to special functions that are only available to administrative level user types.

UserTypes

Welcome Message Edit (WelcomeMessageEditGrid)

The Welcome Message Edit panel allows an administrative user to create, modify and delete or deactivate welcome messages that are displayed when users first log in to the SBAM system.

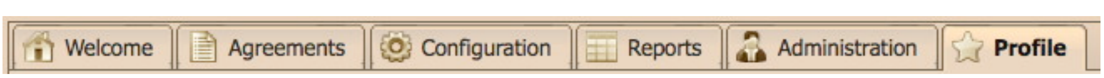
Grids;EditData

User Edit (UserEditGrid)

The User Edit panel allows an administrative user to create, modify and delete users.

Grids;EditData;UserTypes

Profile Tab (ProfileTab)



The Profile Tab allows a user to configure system behavior. Currently the only function it provides is to allow a user to change his or her own password.