Best Practices: Product Set Up and Transactions

1.0 Objective

The Intraware SubscribeNet service offers considerable flexibility in the way a Manufacturer can set up a Product hierarchy. This document:

- Describes typical options for Product Hierarchy
- Recommends methods to optimize the planning and set up of Products.
- Defines the best practice for processing Product transactions, and describes the required process flow for transactions by type (web form or XML). These processes apply to both initial Product set up and updates in SubscribeNet Manager.

2.0 Background

This section describes general Product management concepts and definitions. These are key factors to consider when you determine the appropriate management of your Products.

2.1 Product Set Up Concepts

SubscribeNet uses four primary objects to control the delivery of digital goods:

2.1.1 Entitlements (orders)

- Use Entitlements to grant customers access to software.
- Entitlements contain data that specify elements of the order, such as account, quantity, effective date, etc.
- Entitlements reference Catalog Items.

2.1.2 Catalog Items (price list items)

- What a Manufacturer sells, for example, a Product or a maintenance agreement.
- Have attributes such as default duration, whether the Catalog Item includes updates (maintenance).
- Catalog Items reference one or more Products.

2.1.3 Products (Product releases)

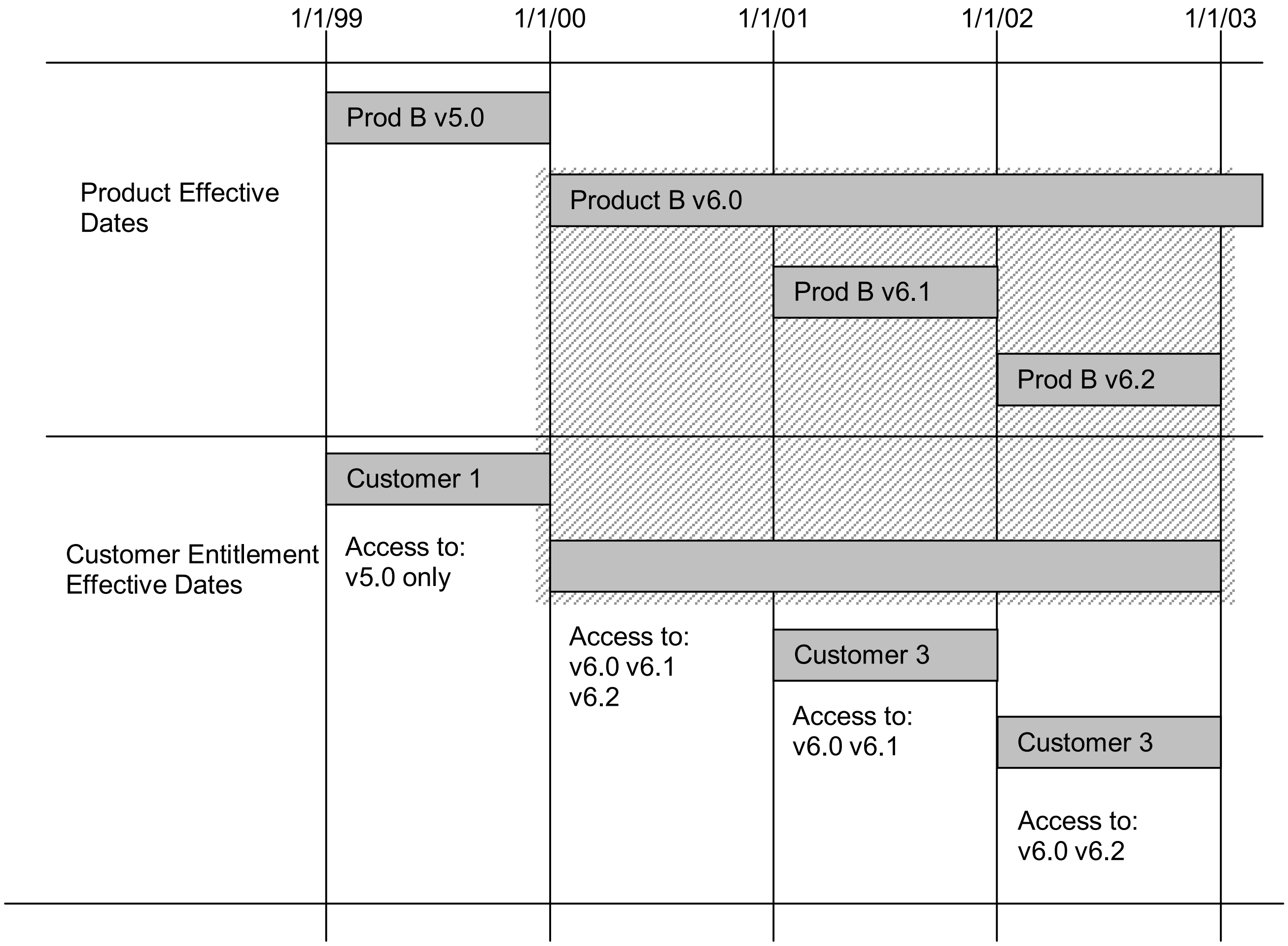
- What the Manufacturer wants delivered, for example, a specific version of a Product.
- Have attributes such as export licenses, version number, platform, or archive dates.
- Products reference one or more Files.

2.1.4 Files (images)

- Actual software Files that the end user downloads, for example, the installation executable for a particular platform.
- A File may be associated to one or more Products.
- Access to a File may be restricted by Account.

2.2 Date Management

Figure 1 – Date Management and its relationship to Entitlements



To effectively set up the Product hierarchy, you should understand the significance of dates on Product Items and Entitlements. Date Management is illustrated best by two model types, the non-Subscription and Subscription Models.

2.2.1 Non-Subscription Model

- Customer 1 has entitlement to Catalog Item for a specific version of Product, which does not grant future access to new Product/bug fixes/patches automatically. “Subscription” attribute on Catalog level set to “No”.

2.2.2 Subscription Model

For Subscription Catalog Items, the Products that the end user sees on the SubscribeNet site are determined by the effective dates defined for the Product(s) and the effective period specified on the Entitlement to the corresponding Catalog Item. “Subscription” attribute on Catalog level set to “Yes”. The Products the end user has access to are determined by the “overlap window” between the effective and expiration dates of the Product and of the Entitlement.

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- Customer 2 has three year entitlement to Catalog Item for the term 1/1/00-1/1/03. On 1/1/00, the customer has access to the current version of Product B version 6.0. On 1/1/01, version 6.1 becomes available and customer gains access to it. On 1/1/02, version 6.2 becomes available to the customer. The customer has access to all three versions because the Product effective dates fall within the range of this customer's entitlement period.
- Customer 3 has one year entitlement to Catalog Item for the term 1/1/01-1/1/02. On 1/1/01, the customer has access to the current versions of Product B v6.0 and v6.1, because the Product effective dates fall within the range of this customer's entitlement period.
- Customer 4 has one year entitlement to Catalog Item for the term 1/1/02-1/1/03. The duration of this customer's entitlement allows access to Product B v6.0 and v6.2.

Generally, access remains indefinitely, unless you limit it by using the "Temporary" attribute on the Catalog level. You the Manufacturer can choose to limit the duration of access. For example, you may want to limit access for Evaluation Software to 30 days. You can also choose to limit the number of downloads of one or more of the Files by using the "Default Max Download Limit" attributes on the Catalog level. Access to Product is driven by:

- A new Entitlement to a Catalog Item.
- A Product update to a Subscription Catalog Item.
- For Subscription Catalog Items, access to software is determined by the "overlap window" between:
  - Effective dates of the Product.
  - Effective dates of the Entitlement.

2.3 Display Management and Product Hierarchy

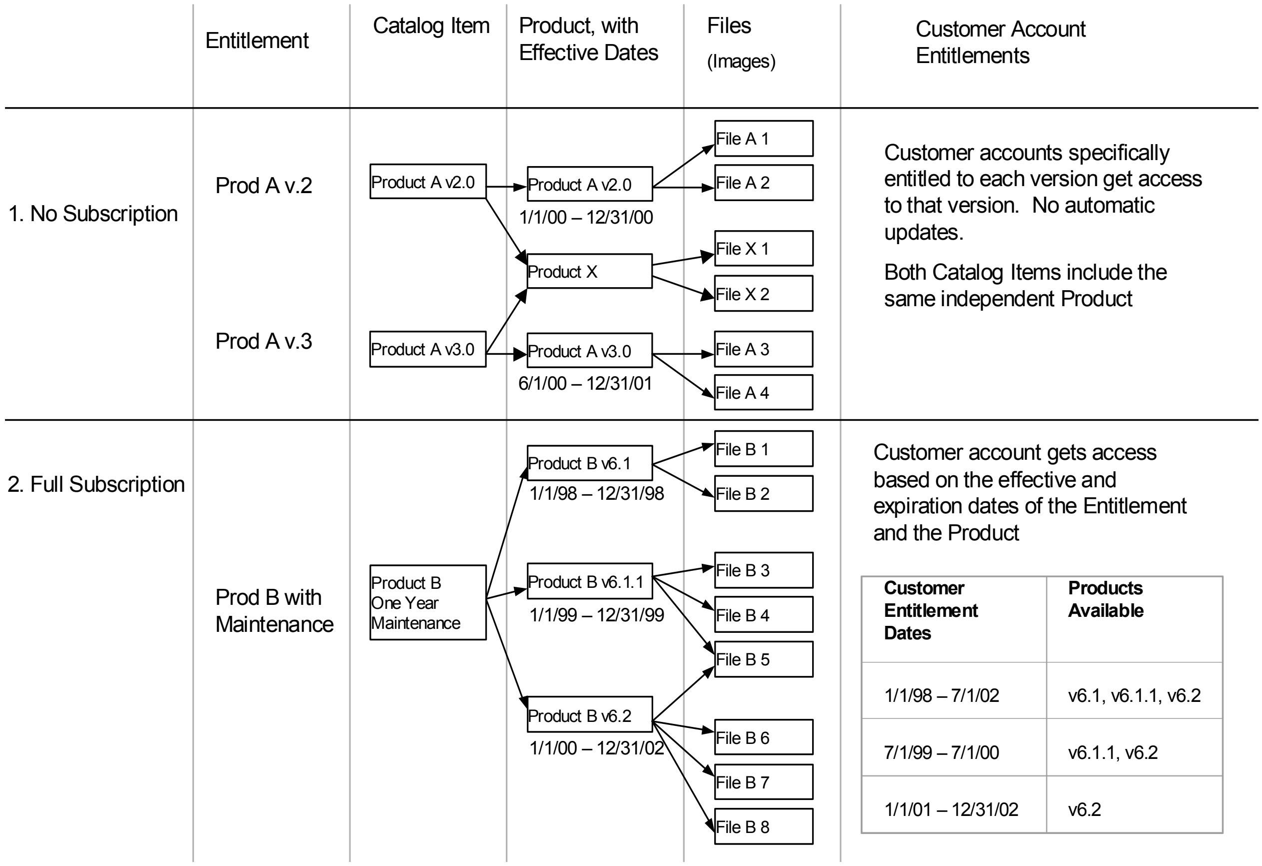
For the purposes of end-user navigation, SubscribeNet supports a Product hierarchy based on attributes associated with Catalog Items, Products, and Files. One commonly used hierarchy is:

- Manufacturer or Product family
- Bundle or suite
- Product line
- Version
  - platform
  - language
  - release number

- Component Files (for example, documentation, executables, etc.) Before the File Download page, the user sees a page that displays Product-specific Terms & Conditions / End User License Agreement that the End User must accept by clicking the "I accept" button. This occurs the first time the User attempts to download Product. The click-through agreements are set at the Product Item level.

These attributes are used to build a hierarchical site in which the user selects the File(s) he wants to download by choosing among the values at each level. For example, select the appropriate *platform* version.

Figure 2 – The Non-subscription and Subscription models illustrate how a Product hierarchy is set up for each model type.



Recommendations

- Limit the levels of hierarchy to reduce the number of clicks.
- Catalog Items should not be version-specific and should include updates.
- Set up major releases as separate Products.
- Bundle files together to create single downloads for documentation and standard installations

For more information on hierarchies, please refer to the SubscribeNet Manager Documentation section entitled, "Best Practices: Product Management."

3.0 Steps in the Set Up and Management of Products

This section describes the best practices to set up each component. This recommended sequence of data transactions to complete Catalog, Product, and File data setup optimizes the process for data management.

There are three data transaction methods:

- SubscribeNet Manager web forms for manual data entry
- XML data feed transactions for automated data entry
- Batch upload of XML-formatted file

  For example, you can convert .csv data templates into XML format with Intraware's IXP Tool, and then upload the XML file through SubscribeNet Manager.

Set Up Steps	Set Up Item	SubscribeNet Manager Web Form	XML Transaction
Step 1	The designated * data attributes must exist before setting up Catalog or Product Items. Each attribute must also be subsequently set on the particular Catalog or Product item for implementation.		
A)	**Manufacturer *** Standard Feature, required field for Catalog and Product Items (Multiple Manufacturers are uncommon).	*Product Management> Configure> Manufacturers*	*Add-Edit Manufacturer*
B)	**Product Lines *** Standard feature, required field for Catalog and Product Items.	*Product Management> Configure> Product Lines*	*Add-Edit Product Line*
C)	**Agreements *** Standard feature, optional field for Product Items. Html formatting required.	*Product Management> Configure> Agreements* (Preview mode available in SubscribeNet Manager only)	*Not available.*
D)	**License Groups *** Standard feature, optional field for Catalog Items. Allows transmission of serial number / license key text with Entitlement transaction data. The text appears in the License Key" tab on the End User download site. Other customized license options such as pools of keys or license generators are available; consult with your Account Manager.	*Product Management> Configure> License Groups*	*Add-Edit License Groups* For customized option where pools of keys are kept in SubscribeNet - Bulk load pools of keys with XML template: *Add License to Pool.*

Set Up Steps	Set Up Item	SubscribeNet Manager Web Form	XML Transaction
Step 2	**Catalog Item** An Entitlement to a Catalog Item will give End User access to a single Product or a suite of Products in conjunction (overlap) with an active maintenance period. The status of Catalog Items (“active” or “inactive”) can be changed so as to reflect your current pricelist.	*Product Management> Add Catalog Item*	*Add-Edit Catalog Item*
Step 3	Product One Product can be associated to multiple Catalog Items. If you have a Catalog Item as a stand-alone license and a Catalog suite that contains multiple stand-alone Products, it is possible to create a single Product to associate to both the stand-alone Catalog Item and Catalog suite. When conducting an update, both the stand-alone and suite can receive the update at the same time if desired. (Refer to Step 11 for updates) *Other hierarchy options available; consult with your Account Manager.*	*Product Management> Add Product*	*Add-Edit Product*
Step 4	**Product Association** (Product-to-Catalog association)	From the Product level menu, select the *Associate to Catalog* form	*Product Association*
	optional	From the Catalog level menu, select the *Associate / Disassociate* submenu *>Associate Product*	

Set Up Steps	Set Up Item	SubscribeNet Manager Web Form	XML Transaction
Step 5 A)	**File -*Add File*** One File can be associated to multiple Products. If your binary packaging supports multiple platforms, we recommend loading a single File with a description to indicate cross platform support instead of loading the file binary ten times with ten descriptions. We recommend using maximum compression when creating file binaries to create the smallest file size possible.	*Product Management> Add File*	*Add-Edit File*
B)	**File - *Upload File*** Transfer the file binaries (CD images) to ESD repository. If you are using the FTP server to store Files, the system scans for Files older than 10 days (UAT and Production) and deletes them. The system does not verify the File was loaded into SubscribeNet Manager before deleting it.	HTTPS method: Upload using browser via SubscribeNet Manager interface. Submit web form for *Add File*, select the File submenu >*Upload File* web form.	FTP method: Transfer Files to Intraware FTP staging server, then process transaction: *Load File Image*.
C)	**Optional – *Restrict File*** Refer to the Documentation section of SubscribeNet Manager "SubscribeNet 9.0 Release Information (PDF)" for details on how to use the *Deliver to Accounts – Restricting a File* functionality.	From the File level menu, select the *Restrict* web form	n/a
Step 6	**File Association** (File-to-Product association)	From the File level menu, select the *Associate to Product* web form	*File Association*
	optional	From the Product level menu, select the *Associate / Disassociate* submenu *>Associate File*	

Set Up Steps	Set Up Item	SubscribeNet Manager Web Form	XML Transaction
Step 7 *End of Process.*	Review / QA the set up	View Catalog item, click into the Product Item, and click the File to confirm "loaded" status. Verify File to Product and Product to Catalog associations are accurate.	
Catalog deliverable is now complete. Proceed to process new Entitlements.			

4.0 Optional – Subscription Management

This section describes how to use SubscribeNet Manager to mass update existing Catalog Items with a new Product Item. For example, you have five different Catalog Items and each contains the same Product Version 1. You have added Product Version 2 and want to make it available to anyone with access to Product Version 1. This shortcut method will allow you to mass associate a Product across multiple Catalog Items in fewer steps.

Update Subscriptions	**This section describes how to make new Products available to existing Catalog Items.**	
Step 1 *End of Process.*	Associate Where This function from the Product Item allows you to add the new Product ID (in the example, the ID for the new version 2.0) to all Catalog Items containing an existing Product ID (the ID for version 1.0). This function is used to update multiple Catalog Items containing the same Product ID with a single transaction.	Function from the Product Item level: In SubscribeNet Manager > *Product Management* > Search *Product* > *Associate / Disassociate* submenu > *Associate Where.*

5.0 Optional - Update Email Notifications

This section describes how to notify existing Members with active status and active Entitlement that there is new Product to download. Once you complete the step in section to update existing Catalog Items, *4.0 Optional – Subscription Management*, you may use this method to send an update notification email. This method allows you to send an email to Members with existing Entitlement without having to process new Entitlement for the new version of product.

<table>
<tr><th>Update Email Notifications</th><th colspan="2">This function is available from SubscribeNet Manager.</th></tr>
<tr><td>Process Overview</td><td> Update Notification Email There are three steps:: Create the email using search criteria to generate a distribution list.

This email uses the standard content derived from the live Update Notification Email template. The template must be in live status and contain the appropriate content before you generate an email notification.
Set up Email Template: From SubscribeNet Manager, go to the Setup tab, List Email Templates, select the Update Notification Email template. Contact your Account Manager for more information or assistance.

Edit the content and distribution list, if necessary.
Queue and Send the email.</td><td> The system criteria for creating an Update Notification Email includes: End Users who are active Members, on active Accounts
The active Account has an Entitlement that gives access to the new Product ID
End User has his email preferences set to receive Update email from Intraware.</td></tr>
<tr><th>Email Setup Steps</th><th colspan="2">This section describes how to notify active Members with active Entitlement that there is new Product to download. You must complete these steps from SubscribeNet Manager.</th></tr>
<tr><td>Step 1</td><td colspan="2"> Create the email using search criteria to generate a distribution list: a) From SubscribeNet Manager, go to the Email tab.
b) Select Create Update Notification Email by Product
c) In the field, "Enter Product IDs of Products to Create a Notification," specify the Product ID(s) relevant to the content for the notification email. You may also use the search page on the lower half of the screen to find and select your products. Click Submit.
d) You can use the next display page to enter "Distribution List Options" for the email list you are about to generate: effective date of an entitlement, include expired entitlements, or exclude emails of a particular domain. Click Submit. While the list is being generated by the system, you see the View Email display page. </td></tr>
</table>

Email Setup Steps	This section describes how to notify active Members with active Entitlement that there is new Product to download. You must complete these steps from SubscribeNet Manager.
Step 2	Edit the content and distribution list, if necessary: e) From the Email toolbar, select *Edit Email* to access the text/HTML fields, to enter/update specific content to the Product release. (The template from *Setup* is the starting point for the standard/generic content) f) Once you create text/HTML content, select the appropriate *Preview* button from the bottom of the display page. Click *Save* when you are done formatting and entering content. g) HIGHLY recommended: *Send Preview Email* to yourself. h) If necessary, you may add/remove members from the distribution list. For example, you may want to CC yourself or an email alias at your company. , Select *Edit Distribution List* from the Email toolbar i) Add additional email addresses in the field provided, or check the *delete* box on an existing email address to remove, click *Submit*.
Step 3 *End of Process.*	Queue and Send the Email: j) From the Email toolbar, select *Send Email.* *k)* From the Send Email display page you have the option to *Send Immediately* (HIGHLY recommended) or *Queue to be sent* later in the day or on another day. Generally, you will send the email immediately after you are done editing the email. Click *Submit.* *l)* SubscribeNet Manager has a short period where the system validates email addresses before actually sending the email externally. If you return to the View Email display, you can see that the Status of the email is changed to "Sent," to indicate that the email job is complete. This page does not automatically refresh; you may need to go to the Email toolbar and select view Email to refresh the display screen.

- **Note about URLs in the Update Notification Emails**

  The Update Notification email notifies users of specific Product or File changes. By design, the URL in the email takes user to a landing page that displays only the specified Product/File associations available at the point the email was generated. Therefore, all Products/Files must be set up completely prior to generating an Update Notification. If you associate a Product/File to entitlements after generating an Update Notification email, the landing page URL from the email content will not display the Product/File that was added later in the process. If a user navigates to the download site without using URL links from an Update Notification email, the user will see normal display for all Product/File entitlements.

6.0 Summary

We have reviewed the components of data set up that are required to manage the concepts of Date and Display Management. The defined data transaction types and sequence of events illustrated the required processes to manage data in SubscribeNet Manager. You should follow these best practices to effectively create and manage a full Product hierarchy for new Entitlements and Update Subscriptions.