Kivuto™

*Digital Distribution. **Simplified.***

WebStore Setup Guide

For New Administrators

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Confidential
Version 1.3

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Introduction

Welcome to your OnTheHub WebStore – a portal for schools to manage academic licensing programs and distribute digital resources.

This guide is meant to introduce new administrators to their WebStores and help them get those WebStores ready for use.

WEBSTORE SETUP OVERVIEW

There are **three key steps** to getting a new WebStore ready for use.

Add products to your WebStore for users to order.
See:
Adding Products

Give your WebStore a look and feel that fits your school.
See:
Customizing Your WebStore

Set up a way for users to access the WebStore.
See:
Adding Users

TERMS AND DEFINITIONS

See below for a list of important terms used in this document and their definitions.

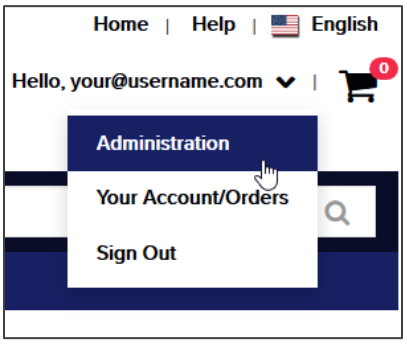
TERM	DEFINITION
Administration site	The site through which administrators manage and customize their WebStores. Administrators can access the Administration site through their WebStores or at e5.onthehub.com/admin.
Administrator	A person responsible for some aspect of managing a WebStore. Administrators are WebStore users who've had user roles assigned to their accounts that give them access to the Administration site and the ability to perform certain tasks there.
Catalog	A collection of products that can be made available on a WebStore. Products are grouped into catalogs based on their publisher, the program they're offered through, and their delivery type.
Delivery type	The way in which a product is delivered to end users. The most common delivery type is Download, but others (e.g. Mail Order) can be set up when necessary.

File group	The files that a user downloads to obtain a product they ordered.
Offering	A product that has been configured for distribution through a WebStore, including all key information related to pricing, order/download restrictions, and delivery type. Some offerings contain more than one related product that can be made available (e.g. the 32-bit and 64-bit version of a piece of software).
Payment method	The way a product is paid for. The most common method is Online Payment, which means users pay for products online when they order them, but products can also be free or paid for by an internal billing code.
Program	A software or eTextbook licensing program supported by your Webstore. Popular supported programs include Microsoft Imagine, the Microsoft Home Use Program, Microsoft Student Option, Microsoft Student Use Benefit, Adobe ETLA, and the VMware Academic Program.
Product	A piece of software, an eTextbook, or another deliverable that can be made available through a WebStore. Products are grouped into catalogs by publisher, program, and delivery type.
User	A person who uses a WebStore. Normally a student, a faculty member, or a staff member at a school.
Username	The ID a user enters along with their password to sign in to a WebStore. A username can be a user's email address or another unique identifier.
User role	A title assigned to a user's account that gives them the ability to access the Administration site and help with WebStore management. A user's role(s) determines what they can do in the Administration site (e.g. view/edit user accounts, set up user verification, run reports).
User verification	The way in which a user's eligibility to access a WebStore and order products is verified when they sign in to the WebStore. See What is User Verification? for more information.
Voucher	A code issued with a piece of software that is needed to unlock or activate that software. A voucher can be a product key, an activation code, a serial number, or anything else used to verify that a copy of a product was obtained legitimately.
WebStore	An online e-commerce site used by schools to distribute software, eTextbooks, and other digital resources to their students, faculty, and staff.

SIGNING IN TO THE ADMINISTRATION SITE

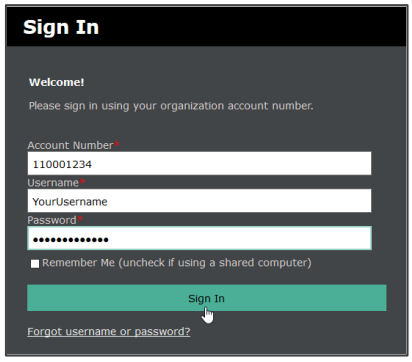
Most tasks described in this document are performed in the Administration site. Administrators can reach this site in two ways.

Through the menu on your WebStore
(top-right corner)



You need to be signed in to see this menu. Signing in requires your username and password.

Through the Administration Sign In page
(e5.onthehub.com/admin)



To sign in this way, you need your organization's account number and your username and password

Adding Products

The first thing a WebStore needs is products for its users to order. This section describes how to add new products to your WebStore by setting up catalogs and offerings in the Administration site.

Specific topics covered in this section are:

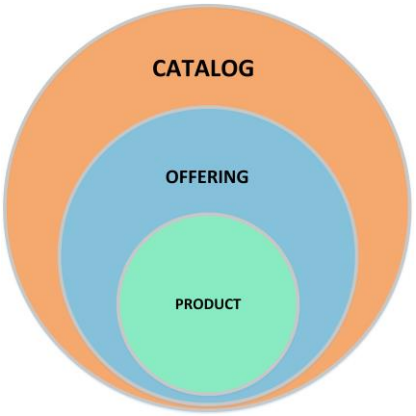
- Products, offerings, and catalogs
- How to add products to a WebStore
- How to remove products from a WebStore

PRODUCTS, OFFERINGS, AND CATALOGS

Before adding products to your WebStore, it's important to become familiar with these three terms.

- A **product** is something an end user orders from a WebStore. It could be a piece of software, an eTextbook, or a digital course package.
- An **offering** is a product (or group of related products) that's been configured for delivery through a WebStore. The offering establishes the product's cost, how it's paid for, any limits to the number of times it can be downloaded, and which version(s) of the product is included with an order (32-bit, 64-bit, or both). An offering has to be published in order to make the included product(s) available on a WebStore.
- A **catalog** is a collection of offerings that are from the same publisher, offered through the same program, and delivered in the same way. A catalog must be configured before any offerings from it can be published.

This relationship between catalogs, offerings, and products is illustrated below.



Catalogs are collections of offerings.

Offerings are products with a specific delivery configuration.

Products are the items users order through your WebStore.

ADDING PRODUCTS TO A WEBSTORE

Before a new **product** can be added to a WebStore, the product's **catalog** and **offering** have to be set up. This involves six general steps.

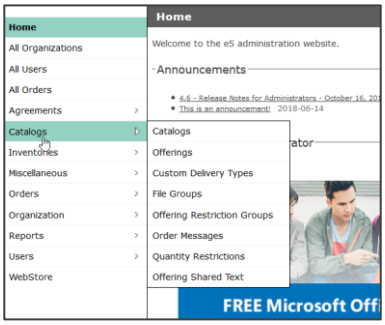
1. Adding the product's catalog
2. Configuring the catalog
3. Adding the product's offering
4. Configuring the offering
5. Testing the offering
6. Publishing the catalog and offering

ADDING CATALOGS

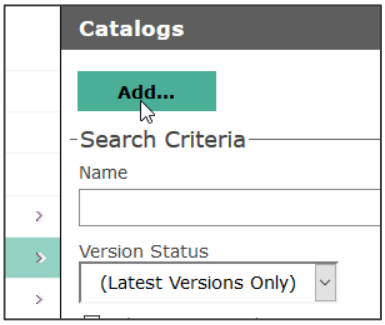
The first step in adding a new product to a WebStore is to associate that product's catalog with your WebStore. This will allow offerings from the catalog to be set up on your WebStore.

To add a catalog:

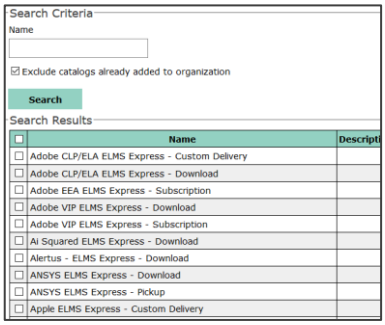
1. Click **Catalogs** in the Administration site. You're directed to the Catalogs page. Any catalogs already associated with your WebStore are listed here.
2. Click **Add**. You're shown a list of available catalogs that can be associated with your WebStore.



Click Catalogs



Click Add

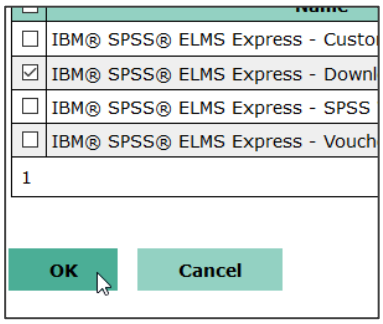


List of catalogs you can add

3. Find the catalog that contains the product you want to add using the Search bar at the top of the page.

> **Tip:** Instead of searching for the product you want to add, search for that product's publisher. The product will be in a catalog that has the name of its publisher in the title.

4. Choose the catalog you need, and click **OK**.



Choose and add a catalog

The catalog is associated with your WebStore. It appears on the Catalogs page of the Administration site in “Draft” status.

Note: Associating a catalog with your WebStore does not add any products from that catalog to your WebStore. However, it does make it possible to manually add offerings from that catalog to your WebStore (see: Adding Offerings).

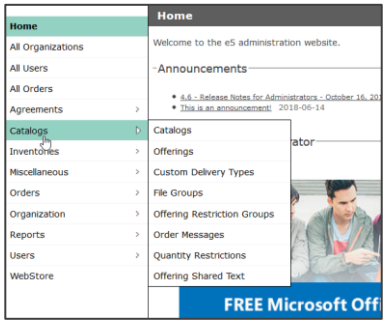
CONFIGURING CATALOGS

After associating a catalog with your WebStore, you need to configure the catalog’s properties before you can make offerings from it available.

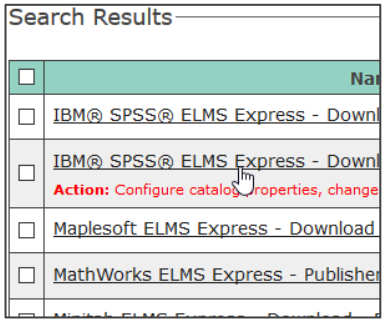
You’ll need to configure two catalog properties at a minimum – **Currency** and **Payment Method**.

To configure a catalog:

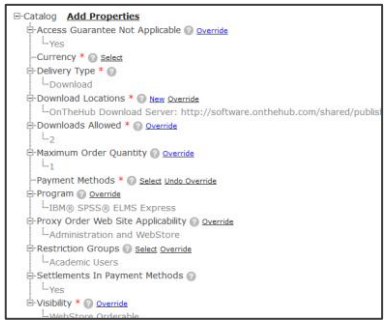
1. Click **Catalogs** in the Administration site. You’re directed to the Catalogs page.
2. Click the name of the catalog you want to configure. You’re directed to the Catalog Properties page.



Click Catalogs



Click on a Catalog

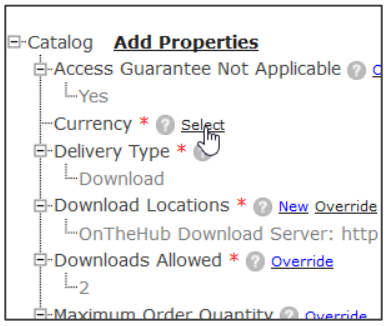


Catalog Properties page

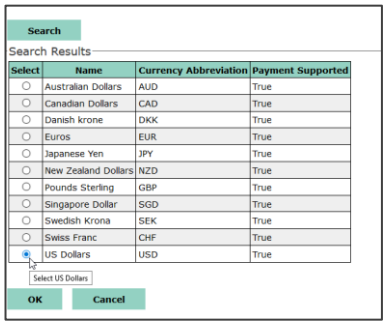
Note: By default, all offerings within a catalog share their catalog’s properties (e.g. the same currency and payment method, the same eligibility and download restrictions, etc.). However, offerings can be individually configured to have

different properties than their catalog (see: Configuring Offerings).

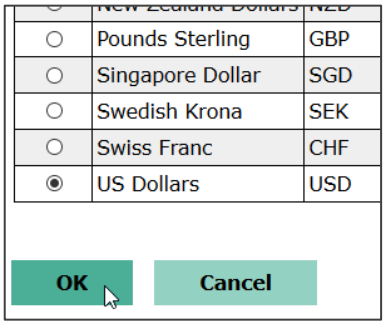
3. Configure the **Currency** property. This establishes what type of currency will be used to pay for products in the catalog (e.g. US Dollars or Euros).
    i. Click **Select** next to **Currency**.
    ii. Select the currency type you want to use.
    iii. Click **OK**.



Click Select

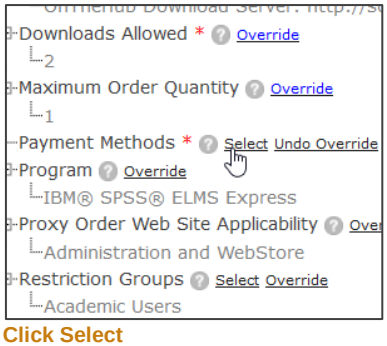


Choose currency

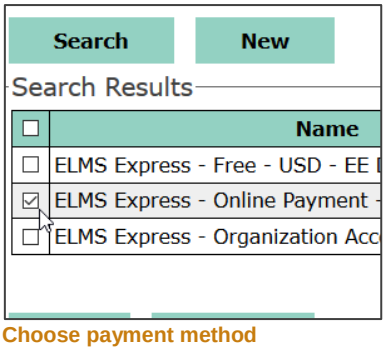


Click OK

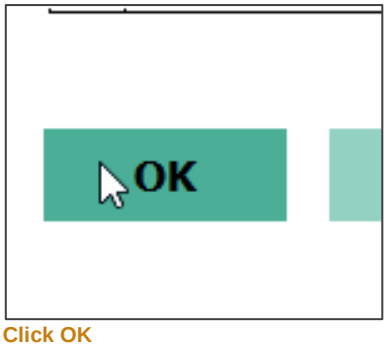
4. Configure the **Payment Method** property. This establishes how (and if) users will pay when they order products from the catalog.
    i. Click **Select** next to **Payment Methods**.
    ii. Search for a payment method you want to apply. Your options include:
        - **Free** – Users don't have to pay for products in this catalog.
        - **Online Payment** – Users are prompted to pay online using a credit card or PayPal while placing their order.
        - **Organization Account** – Products are purchased using an internal billing code provided by your school.



Click Select



Choose payment method



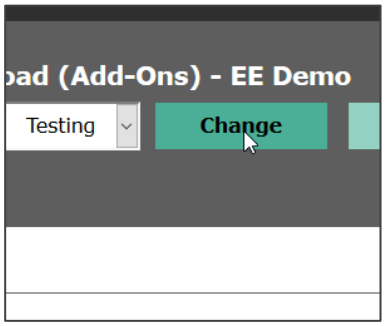
Click OK

Note: If you want your users to have more than one option for paying for products in the catalog, you can add more than one payment method to the catalog.

5. Review the catalog's other properties to make sure no more changes are needed.

   Note: You can learn what a property means by clicking the icon beside its name. When necessary, you can add additional properties to the catalog by clicking **Add Properties**.

6. Click the **Change** button at the top of the page to change the catalog's status from Draft to Testing.



Change catalog status to Testing

Note: Catalog properties can only be edited while the catalog's in Draft status. If you need to make changes to a catalog's properties later, you'll need to change its status back to Draft first. This can only be done *before* you add offerings from the catalog to your WebStore. Once an offering's been added, its catalog's status cannot be changed back to Draft, and you'll need to create a new draft of the catalog to change its configuration.

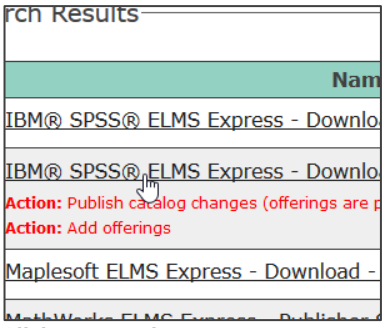
ADDING OFFERINGS

Once you've added and configured a product's catalog, you can start to set up offerings from that catalog.

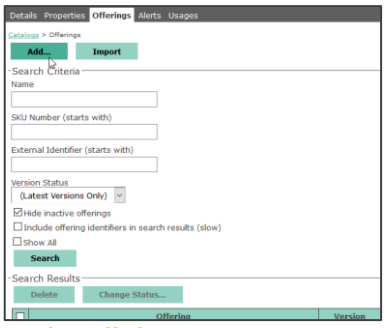
To add an offering:

1. On the Catalogs page, click the name of the catalog you want to add an offering from. You're directed to the Catalog Offerings page, where any offerings already added from that catalog will be displayed.

Click Catalogs



Click on a catalog



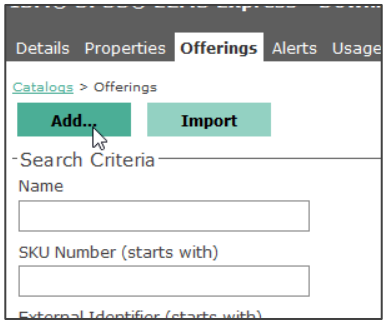
Catalog Offerings page

2. Click the **Add** button. A new window opens where you can search the catalog for offerings.

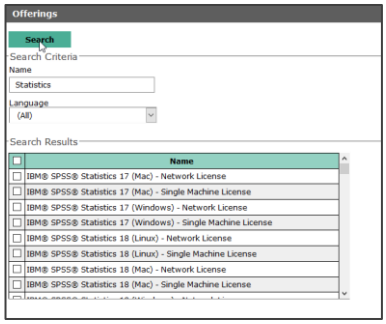
3. Search for the offering you want to add to your WebStore.

   Tip: Search for the name of the product you want to add. Offering names identify the included product(s), some information about its default delivery configuration (e.g. whether it delivers the 32- or 64-bit version), and the language the product's offered in.

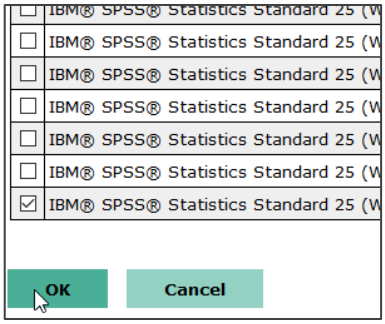
5. Choose the offering you need, and click the **OK** button at the bottom of the page.



Click Add



Search offerings



Add offering

The offering is associated with your WebStore in Draft status. It still needs to be configured and published before the included product(s) becomes available on your WebStore (see: Configuring Offerings).

CONFIGURING OFFERINGS

After selecting an offering from a catalog, you can configure details about the offering to get it ready for distribution.

You'll normally need to configure three offering properties – **Products**, **Vouchers**, and **Pricing**.

Note: You can modify any of an offering's properties if you want (e.g. Currency, Payment Method, Pricing). If you don't, the offering will use the same properties that were configured for its catalog by default.

To configure an offering:

1. On the Catalog Offerings page, click on the offering you just added. You're directed to the Offering Properties page where you can configure the offering.

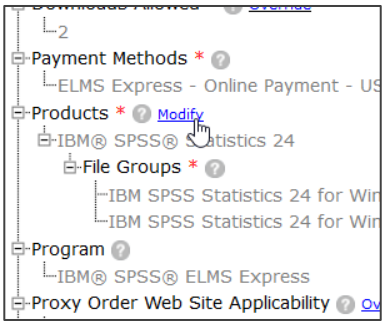
2. If there are no products identified under the File Groups property, you'll need to add file groups for users to download.

   i. Click **Modify** next to the **Products** property. This allows you to edit the File Groups included in the offering.

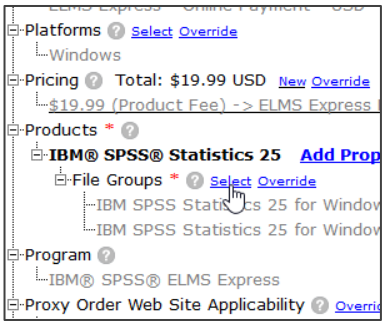
   ii. Click **Select** next to **File Groups**. You're shown a list of file groups for the product that

you can add to the offering.

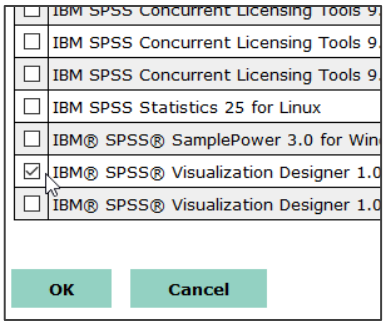
iii. Choose the file group you want to add to the offering, and click **OK.**



Click Modify



Click Select

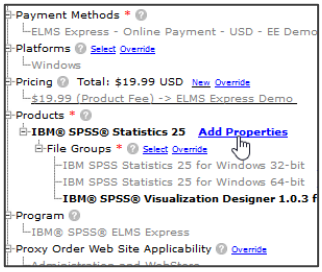


Choose file group(s)

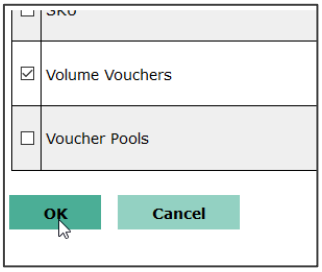
3. If the product's publisher told you that the offering requires a voucher, assign one to the offering.

   i. Click **Add Properties** next to a product name.

   ii. Choose the type of voucher you want to use for the offering, and click **OK.**



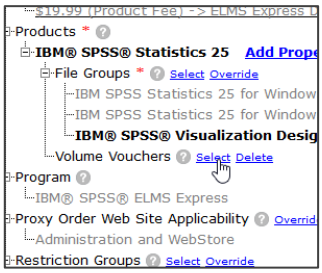
Click Add Properties



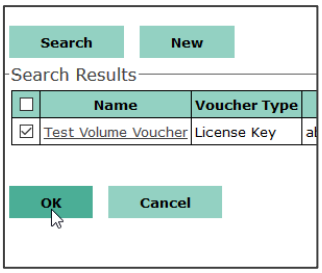
Choose voucher type

   iii. Click **Select** next to the voucher type you just added.

   iv. Choose the voucher to use for the offering, and click **OK**.



Click Select

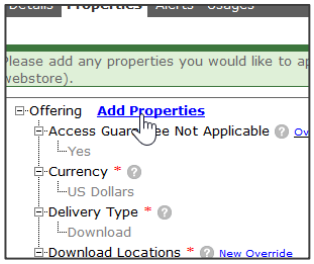


Choose voucher

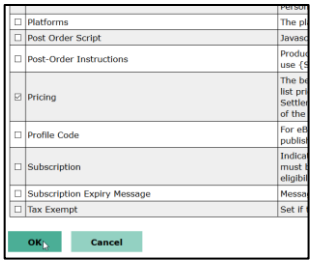
4. If the offering is not for a free product, configure the **Pricing** property. This establishes how much the product(s) will cost on your WebStore.

   i. Click **Add Properties** at the top of the list of properties. You're shown a list of other properties that can be applied to the offering.

   ii. Select the property **Pricing**, and click **OK**. The Pricing property is added to the list on the Offering Properties page.



Click Select

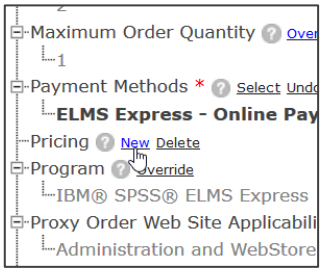


Select Pricing

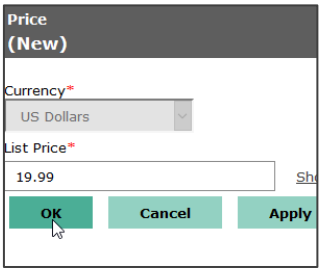
iii. Click **New** next to the Pricing property.

iv. Enter a **List Price** for the offering in the window that opens. The price you enter will be in the currency you configured at the catalog level.

v. Click **OK** or **Apply**. The price you entered is applied to the offering.



Click New



Enter price

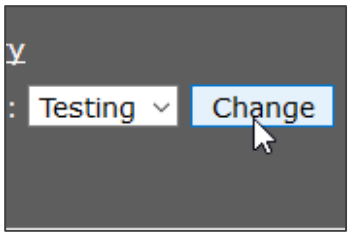
Note: The Pricing property does not need to be configured for free products.

TESTING OFFERINGS

When you're happy with an offering's configuration, you'll want to test it before you publish the offering.

To test an offering:

1. Click the **Change** button at the top of the Offering Properties page to change the catalog's status from Draft to Testing.



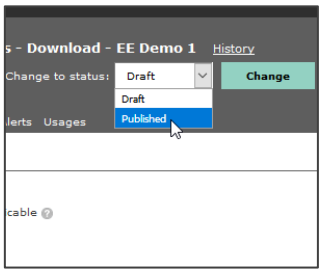
2. Preview your WebStore in Test mode (see: Previewing Your WebStore). While in Test mode, try to order the product to make sure there were no problems with its configuration.

PUBLISHING CATALOGS AND OFFERINGS

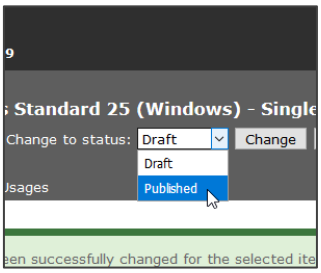
The last step in adding a product to your WebStore is to publish the product's catalog and offering. Once the catalog and offering have been published, the product becomes available for eligible users to order on your WebStore.

To publish the catalog and offering:

1. Change the catalog's status from Testing to Published.
    i. Return to the Catalog Properties page.
    ii. In the **Change to status** field at the top of the page, select **Published**.
    iii. Click the **Change** button.
2. Change the offering's status from Testing to Published.
    i. Return to the Offering Properties page.
    ii. In the **Change to status** field at the top of the page, select **Published**.
    iii. Click the **Change** button.



Publish catalog



Publish offering

The offering is published, and the included product(s) is added to your WebStore.

REMOVING PRODUCTS FROM A WEBSTORE

Occasionally, you may want to change the selection of products available on your WebStore. You can add more products as described in the previous sections. If you ever want to remove a product from your WebStore, follow the steps below.

To remove a product from your WebStore:

1. Go to the Offering Properties page.
2. In the **Change to status** menu, select **Inactive**.
3. Click **Change**.

The offering is deactivated, and the included product is taken off your WebStore.

To remove all products from a catalog from your WebStore:

1. Go to the Catalog Properties page.
2. In the **Change to status** menu, select **Inactive**.
3. Click **Change**.

The catalog is deactivated, and all included products are taken off your WebStore.

Customizing Your WebStore

Your WebStore should reflect your school's branding and style. This section describes how to customize your WebStore for a look and feel that fits your organization.

Specific topics covered in this section are:

- Changing WebStore colors
- Adding a logo to your WebStore
- Creating a Welcome page for your WebStore
- Previewing your WebStore

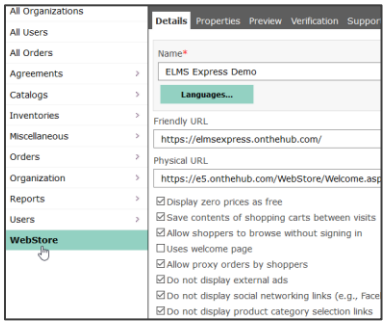
Note: These tasks are optional but recommended to get your WebStore looking its best.

CHANGING WEBSTORE COLORS

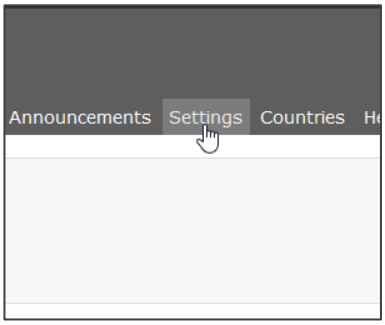
You can change the colors on your WebStore to better reflect your organization. For example, you can customize the colors used for text, links, warning messages, and your WebStore's background to match your school's official colors.

To change WebStore colors:

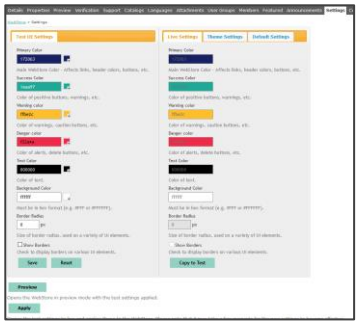
1. Click **WebStore** in the Administration site, and then click the **Settings** tab. You're directed to the WebStore Settings page, where you can edit the colors used on your WebStore.



Click WebStore



Click Settings


WebStore Settings page

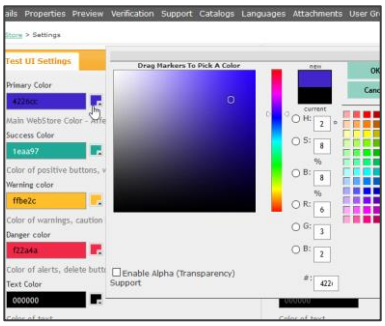
2. Under "Test UI Settings," make any changes you want to your WebStore's color settings. You can change a color by clicking the small box to the right of it and choosing a new one.

   Tip: Under every setting you can change, there's text describing what that setting does and where that color appears on your WebStore.

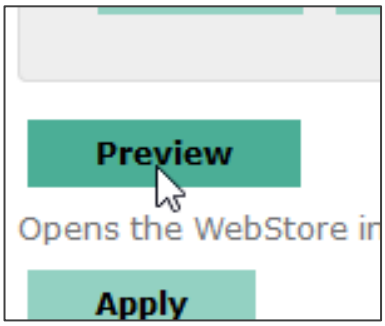
   If you don't like the colors you've chosen, you can start over from your WebStore's current colors by clicking the **Copy to Test** button.

3. When you've picked a color scheme you like, click the **Preview** button to test it. This shows you what your WebStore will look like with the colors you picked without affecting the way it looks to anyone else.

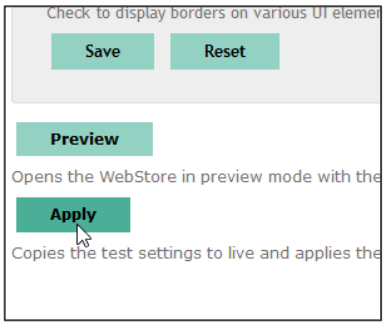
4. When you're happy with the colors you've picked, click **Apply** on the WebStore Settings page.



Change colors



Preview changes

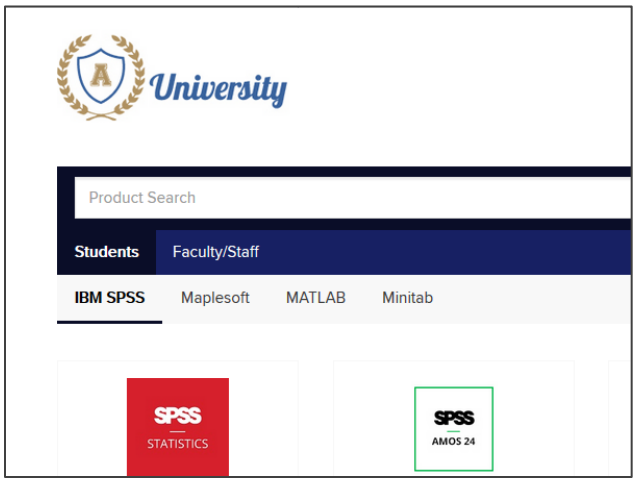


Click Apply

The new color scheme you've created takes effect and replaces the default colors on your WebStore.

ADDING A LOGO

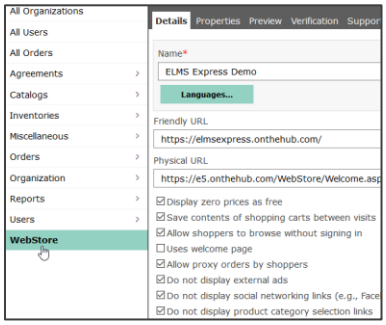
You can add a school logo to your WebStore to brand it to your organization. The logo will appear as a banner image at the top-left of the WebStore.



School logo on WebStore

To add a logo to your WebStore:

1. Click **WebStore** in the Administration site, then click the **Attachments** tab. You're directed to the WebStore Attachments page, where you can upload images to your WebStore.



Click WebStore

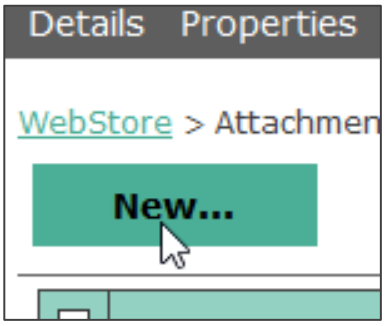
Click Attachments

2. Click **New** to add a new image. A new window will open where you can select the type of image you want to add.

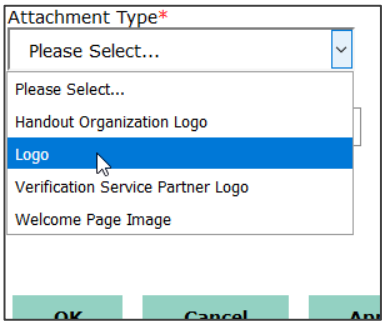
3. In the **Attachment Type** menu, select **Logo**.

4. Click **Browse**, and select an image file of your school's logo to upload from your computer.

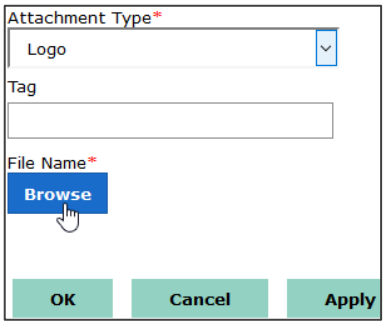
5. Click **Apply** or **OK**.



Click New



Pick Logo



Browse for image

Your logo is added to the top of your WebStore.

CREATING A WELCOME PAGE

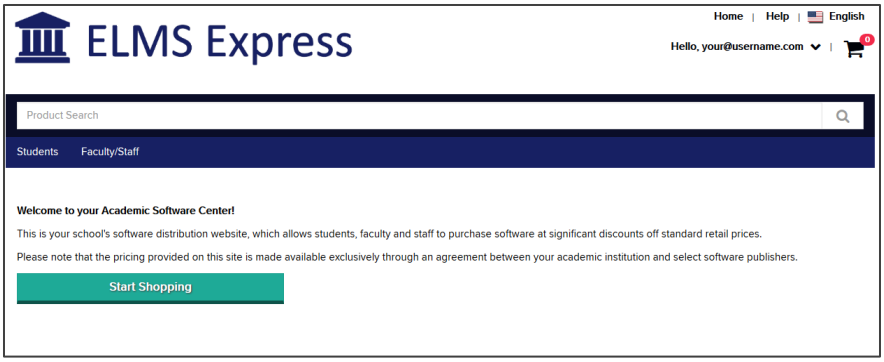
A Welcome page is a customizable home page for your WebStore. Users land on this page when they navigate to your WebStore or click the **Home** link on it. You can add your own message or image to the page to communicate important information or reinforce your school's branding.

Note: If you don't set up a Welcome page, your users will land on the main product page when they navigate to your WebStore.

To create a Welcome page:

1. Click **WebStore** in the Administration site. You're directed to the WebStore Details page.

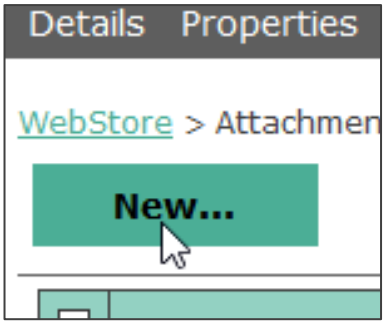
2. Click the check box beside the option **Uses welcome page**. This gives your WebStore a generic Welcome page like the one below. You can customize the text and add an image in the following steps.



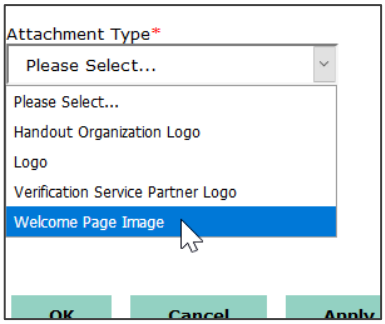
Default Welcome page (not customized)

3. Add an image to your Welcome page.
   i. Click the **Attachments** tab.
   ii. Click **New**.
   iii. In the **Attachment Type** menu, select **Welcome Page Image**.
   iv. Click **Browse**, and select the iamge image file you want to add to your Welcome page.
   v. Click **OK** or **Apply** to add the image to your Welcome page.

Click Attachments

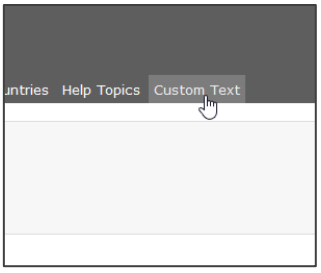


Add new attachment

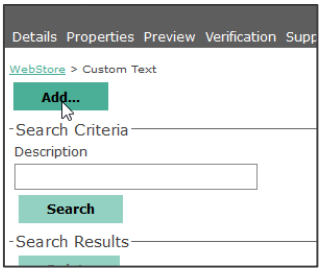


Choose Welcome Page Image

4. Change the message on your Welcome page.
   i. Click the **Custom Text** tab. You're directed to the WebStore Custom Text page, where custom messaging and labels can be applied to your WebStore.
   ii. Click **Add**. You're shown a list of customizable text items that can be added to your WebStore.



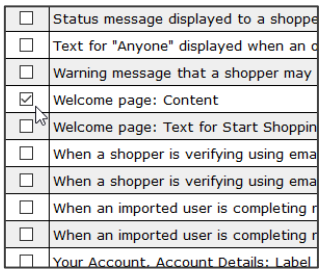
Click Custom Text



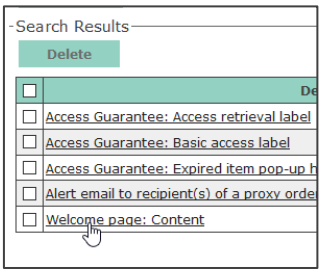
Click Add

iii. Choose **Welcome Page: Content**, and click **OK**.

iv. On the WebStore Custom Text page, click on **Welcome Page: Content** to edit the message that appears on your Welcome page.



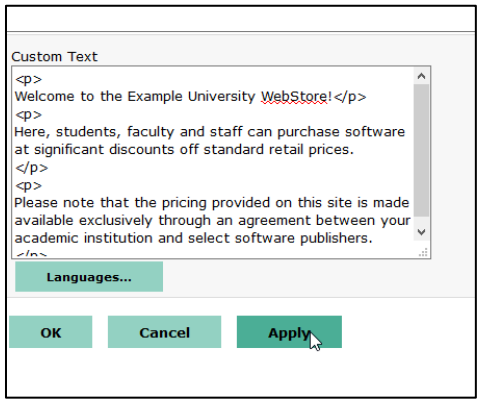
Add Welcome page



Click to edit

v. Write a new message in the **Custom Text** field.

vi. Click **OK** or **Apply**. Your Welcome page is updated to show the message you created instead of the default message.



Customize welcome message

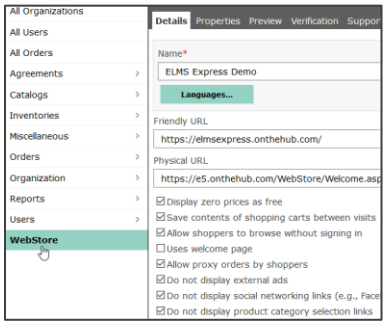
PREVIEWING YOUR WEBSTORE

You can preview your WebStore if you want to see how it's shaping up. If you want to test something risk-free (e.g. test the ability to order a product without actually placing an order and receiving the product), you can preview the WebStore in Testing status. You can even preview the WebStore from the point of view of another user, which can be useful if you ever need to help someone work through a problem on

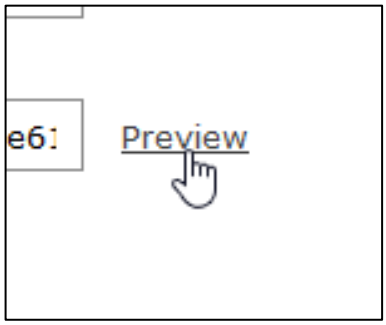
the WebStore.

To preview your WebStore:

1. Click **WebStore** in the Administration site. You're directed to the WebStore Details page.
2. Click the **Preview** link. A new window opens showing your WebStore with you signed in.



Click WebStore

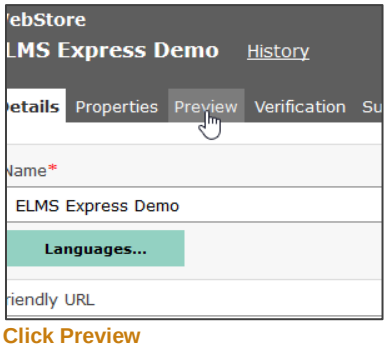


Click Preview

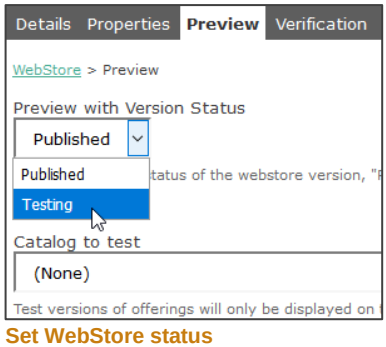
To preview your WebStore in Testing status:

1. Click **WebStore** in the Administration site, and then click the **Preview** tab.
2. In the **Preview with Version Status** menu, select **Testing**.
3. If you're testing a catalog you configured, select that catalog in the **Catalogs to Test** menu.
4. Click the **Preview** button. A new window opens showing your WebStore in Testing status with you signed in.

> **Note:** While in Testing status, no changes you make will affect your actual WebStore or your account. Any orders you place will count as test orders and won't result in you being charged or receiving any products or product keys.



Click Preview



Set WebStore status

To preview your WebStore as another user:

1. Click **WebStore** in the Administration site, and then click the **Preview** tab.

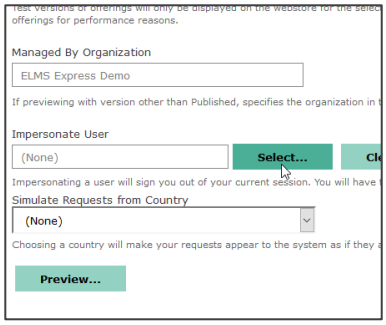
2. In the **Preview with Version Status** menu, choose which mode you'd like to view the WebStore in ("Testing" to preview in Testing status; "Published" to preview the live version of your WebStore).

3. Click the **Select** button next to the **Impersonate User** field.

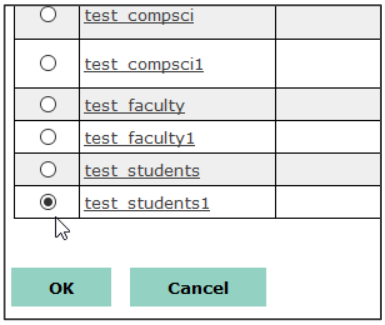
4. Find and select the user you want to impersonate.

   Note: You can only preview from the point of view of an ordinary user. Administrator accounts can't be used to preview a WebStore in this way.

5. Click the **Preview** button on the WebStore Preview page. A new window opens showing your WebStore with you signed in to the account of the user you selected.



Click Select



Select user to preview as

Click Preview

Adding Users

A WebStore is only useful if eligible users can access it. This section describes how to give your students, faculty, and staff the ability to sign in to your WebStore.

Specific topics covered in this section are:

- User verification
- Appointing administrators

WHAT IS USER VERIFICATION?

User verification is the way your WebStore determines who you are when you sign in. It prevents unauthorized users from accessing the WebStore and ensures that all users can only order products they're eligible for.

> **Note:** What products a user is eligible to order is determined by:
>
> - The type of user they are (e.g. a student or a faculty member)
> - The department(s) they belong to (e.g. Department of Science)
> - The program(s) that the user's department(s) and campus are enrolled in (e.g. Microsoft Imagine, Student Option, or Adobe ETLA).

Your WebStore needs a user verification method in place before anyone can sign in. One method came preconfigured so that you could sign in. However, we recommend setting up a more robust method before your WebStore goes into use – ideally a **Single Sign-On (SSO)** method.

USER VERIFICATION OPTIONS

Single Sign-On

Kivuto strongly recommends that all schools use a **Single Sign-On (SSO)** verification method to give users access to their WebStores. Here's why.

- **Convenient for users**: SSO lets users access their WebStore through the same sign-in portal they use to access other sites and services (e.g. Office 365 or their school's website) using the same user ID and password. They can then move seamlessly between all services and applications accessed through that sign-in portal.
- **Convenient for administrators**: SSO takes away the need for administrators to manage user accounts in the Administration site.

Kivuto supports the following SSO verification methods.

- Integrated User Verification (IUV)
- Shibboleth User Verification
- Active Directory Federation Services (ADFS)
- Office 365 Single Sign-On

Setting up SSO requires a great deal of technical proficiency. Have your IT department contact tac@kivuto.com to arrange implementation. Documentation to help them through your school's side of the process can be found in Appendix A.

Other Verification Options

Although Kivuto strongly recommends contacting us to set up an SSO verification method, your WebStore can support many other kinds of user verification. The most popular options are listed below.

- **User Import** – Create accounts on your WebStore by manually importing lists of users through the Administration site. This method comes preconfigured on most WebStores. See our User Import Instructions for details.
- **Email Domain** – Users register their own accounts by entering a valid email address issued by your school to prove their eligibility.
- **Submit Proof** – Users can be required to submit physical proof of their eligibility (e.g. a scanned image of a valid student card) in order to register an account.

See Kivuto's User Verification Comparison Chart for more information about these and other supported verification methods.

APPOINTING ADMINISTRATORS

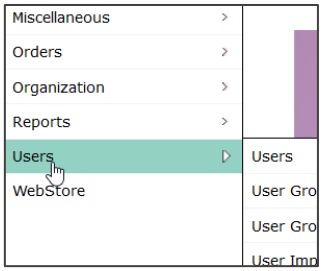
Managing a WebStore takes more than just one person. You can appoint additional administrators to help you with the everyday administration of your WebStore and its users. This is done by assigning administrative roles to users' accounts through the Administration site.

To appoint an administrator:

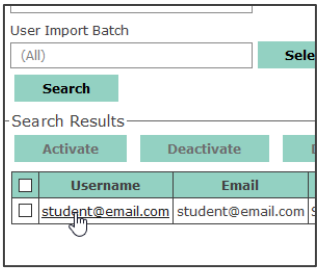
1. Find the user account to which you want to assign an administrative user role.
    i. Click **Users** in the Administration site. You're directed to the Users page, where you can search user accounts.

ii. Find the user you want to make an administrator. You can search by username, email address, or other criteria.

iii. Click on the user's username in the Search Results table.



Click Users



Click username

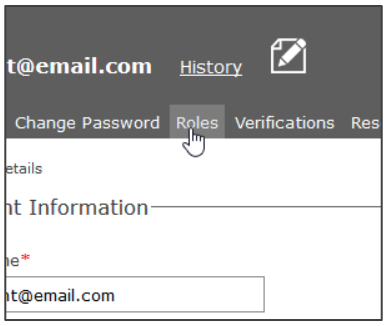
2. Add an administrative role to the user's account.

i. Click the **Roles** tab.

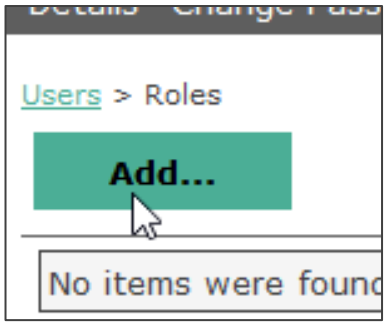
ii. Click the **Add** button.

iii. Select the role you want to assign to the user.

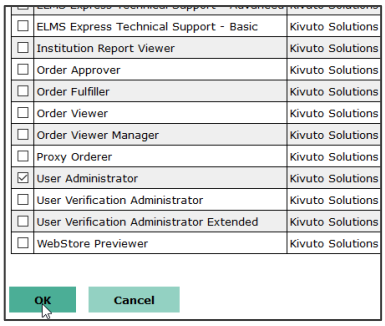
iv. Click **OK**.



Click Roles



Click Add



Choose role

Get Help

If you need more help getting your WebStore set up or have questions about any of the information in this guide, you can always contact Kivuto for extra support.

Email: support@kivuto.com

Phone: 1-866-435-4722

Appendix A – Related Documents

Document	Description	Location
ADFS Implementation Guide	Guides IT professionals through the configuration of ADFS SSO verification on a WebStore	https://software.onthehub.com/documentation/ADFS_SSO_en-us.pdf
Administration Training Video	A video guide for new administrators, with a focus on ongoing WebStore management	https://vimeo.com/242257579
Integrated User Verification (IUV) Implementation Guide	Guides IT professionals through the configuration of IUV SSO verification on a WebStore	https://software.onthehub.com/documentation/ELMS_Integrated_User_Verification_Customer_Implementation_Guide_en-us.pdf
Office 365 SSO Implementation Guide	Guides IT professionals through the configuration of Office 365 SSO verification on a WebStore	https://software.onthehub.com/documentation/Office365_SSO_en-us.pdf
Shibboleth Implementation Guide	Guides IT professionals through the configuration of Shibboleth SSO verification on a WebStore	https://software.onthehub.com/documentation/ELMS_Shibboleth_User_Verification_Customer_Implementation_Guide_en-us.pdf
User Import Instructions	Walks administrators through the process of creating user accounts through a user import	https://software.onthehub.com/documentation/UserImport.pdf
User Verification Comparison Chart	Summarizes all user verification methods your WebStore can support and the pros and cons of each option	https://software.onthehub.com/documentation/user-verification-comparison-chart_en-us.pdf

Appendix B – Pages of the Administration Site

Page name	How to reach	Purpose
Catalogs	Click: **Catalogs**	View catalogs that have been associated with your WebStore. Associate new catalogs with your WebStore.
Catalog Properties	Click a catalog name on the Catalogs page, then click the **Properties** tab	Configure catalog properties. Change catalog status.
Catalog Offerings	Click a catalog name on the Catalogs page, then click the **Offerings** tab	View offerings that have been associated with your WebStore. Associate new offerings with your WebStore.
Offering Properties	Click an offering name on the Catalog Offerings page, then click the **Properties** tab	Configure offering properties. Change offering status.
WebStore Attachments	Click: **WebStore** » **Attachments**	Add images to your WebStore.
WebStore Custom Text	Click: **WebStore** » **Custom Text**	Add or edit text items on your WebStore.
WebStore Details	Click: **WebStore**	View/edit basic options and information about your WebStore.
WebStore Preview	Click: **WebStore** » **Preview**	Preview your WebStore in Published or Testing status. Preview your WebStore from the point of view of another user. Test catalogs/offerings.
WebStore Settings	Click: **WebStore** » **Settings**	Change WebStore colors.
WebStore Verification	Click: **WebStore** » **Verification**	Add user verification methods to your WebStore.