SONISWEB®

Scholastic ONline Information System
for the Web

User Authorization & Profiles

When you add a person to your records, she or he gets an ID. If that person's a Student, Faculty member, Applicant, Alumnus, or Alumna, issue a PIN to give access to your system. All it takes is the ID and the PIN. For an administrative person, you issue a User-ID and password not a PIN for SONISWEB® access. The User-ID is attached to a Profile. With the User-ID and password, the administrative user gets access to SONISWEB®. See "Figure 4 Profiles and Status" on page 5.

This text describes PINs, User-IDs, Profiles and user authorization. It shows your choices and provides some illustrations so you can use the built-in profiles and create your own for your users.

This text starts with **navigating** the functions on page 3, then provides a **quick reference** on page 6, and dives into the **details** starting on page 17. To see the **changes** in this edition look on page 3.

March 2006

RJM Systems, Inc.

TABLES OF CONTENTS

(UserAuthorizationProfiles.doc - 03/21/06 12:41 PM)

NEW IN THIS EDITION

■ This edition is for SONISWEB® version 2.0. A few of these changes were also added to version 1.4.

■ Figure 1 Tabs for those with PIN Access and Figure 2 Toolbar3 for those with User-ID access, page 4.

■ Figure 58 Login Displays and Figure 59 Typical SONISWEB® Page, page 40.

■ Most of the reports have been rewritten in the Cold Fusion™ Report Builder. Those have "(RB)" following their names as seen in Figure 3. The older Crystal Reports™-Enterprise reports (without the "RB") are still available in most cases.

■ "User Password Change", page 9.

■ "Limits and Overrides for Individuals", page 11.

■ "Limits and Overrides in Detail", page 24.

■ "Holds Placement", page 25.

■ "Query Builder Limitations", page 25.

■ "Privileges", page 27.

■ "Displaying User Settings", page 29.

NAVIGATING THE FUNCTIONS

- Figure 1 Tabs for those with PIN Access

A Student, Faculty member, Applicant, or Alumnus/a with a PIN sees an initial display like Figure 1. (This example is for a Faculty member; Students, Applicants, etc. have different access rights, so different tabs.) Figure 4 (page 5) shows this graphically.

An Administrator is the one to assign or change the PIN[1] for an individual by clicking **Names** (Figure 2) and changing the **PIN** (personal identification number) in that person's Biographic record. An Administrator can set up PINs for whole groups as described on page 7.

If the "Disabled" checkbox[1] is set in a person's Biographic record, that person cannot log on even with a valid ID and PIN.

- Figure 2 Toolbar[3] for those with User-ID access

An administrative user has a User-ID and Password instead of a PIN[2] and sees an initial display[3] like Figure 2. Administrative users can be anyone in your system with an ID but typically they're paid Staff and those few Faculty with additional administrative duties.

You assign **User-ID**s and Passwords to administrative users by clicking **Names** (Figure 2). In assigning User-IDs to administrative users, you associate a person with one of the profiles you set up. Figure 4 (page 5) shows this graphically.

The access rights of an administrative user is defined by:

1. The **Profile** you select when you issue a User-ID and Password. Typical Profile categories are the Registrar, the Registrar's staff, the Financial Officer, Admissions staff, Deans, etc. You set up one profile to cover all the people in each staff category.

2. The individual **limits** you specify for this person that restricts what the profile would otherwise permit. You're prompted for these limits just after you assign a profile.

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[1] Changing PINs and disabling users are authorized privileges as described on page 27.

[2] There are some reasons to give a person both a PIN and a User-ID-Password. A teaching Dean can have a PIN for Faculty access to enter grades for courses she or he teaches and a User-ID and Password as Dean to access applicant records to review incoming students.

[3] You only see what you're authorized to see by your Profile and individual Limits and Privileges. So your choices may be fewer than these.

3. The **privileges** you add for this <u>individual</u>. This adds access and functions beyond what the profile permits for other users assigned to it. You get this choice after setting the limits.

After clicking a choice in Figure 2 you get the selections shown in Figure 3. Selecting a person's name using **Names** gives you the list on the left. Clicking **Systems** give the list on the right. The functions you need in this text are circled.

S⬩NISWEB™

Records

| Activities |
| Address |
| Biographic |
| Education |
| Employment |
| Fundraising |
| Parking |
| Parking Incidents |
| Post Tuition Tcodes |
| Schedule |
| Tests: Additional |
| User Security |

S⬩NISWEB™

Systems

| Change My Password |
| Enable Login |
| Master Profile |
| Profile Utility |
| System/User Settings |
| User IDs |
| Web Log |
| Web Options |

- Figure 3 Function Lists[3] - Partial

Alumni, Applicants, Faculty, Students, etc.

Administrators

Faculty Security

Retrieve Standard "Profile" of the Faculty, Student, Alum, etc. ← Standard "Profiles"

Named Profiles → Retrieve Profile Assigned to this Person

Administration Security

Individual Limits and Privileges → Retrieve Individual Limits and Privileges for this Person

- Figure 4 Profiles and Status

QUICK REFERENCE

What do you want to do?

- Assigning a PIN to an Individual, page 7 .

- Assigning PINs to Non-Administrator Groups, page 7.

- Enabling or Disabling any User, page 8.

- Lost or Forgotten Password or PIN, page 9

- Assigning an ID to an Administrative User, page 10.

- Changing the ID of an Administrative User, page 13.

- Setting up an Administrative Profile for a Group of Users, page 14.

- Checking Administrative User ID or Status, page 16.

- Diagnosing and Fixing Problems, page 6.

- Setting Your Browser for Proper Function and Security, page 6.

- If you don't see what you need above, check the table of contents on page 2. You can also use the Adobe® find or search functions illustrated in Figure 5. It allows a Google®-like search[4] by word or phase.
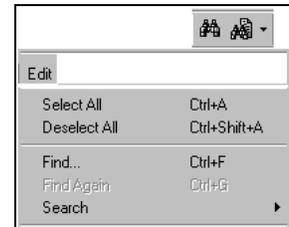
• Figure 5 Adobe® Find and Search

Diagnosing and Fixing Problems

See the text "Messages, Errors, and Diagnosis".

Setting Your Browser for Proper Function and Security

Internet Explorer[5] (IE), Fire Fox™, Netscape®, and Opera Web browsers have an "auto-complete" or password-form save feature that is handy for individual computers but defeats privacy on shared computers like those in computer labs and libraries. See the text "Browser Settings" to set your browser for security, good performance, and to prevent your getting old data.

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[4] If you're unfamiliar with this searching, click Adobe® reader Help or see the SONISWEB® text "Index to Texts".

[5] Only Internet Explorer (IE) version 5.5 or later is supported for administrative use.

Assigning a PIN to an Individual

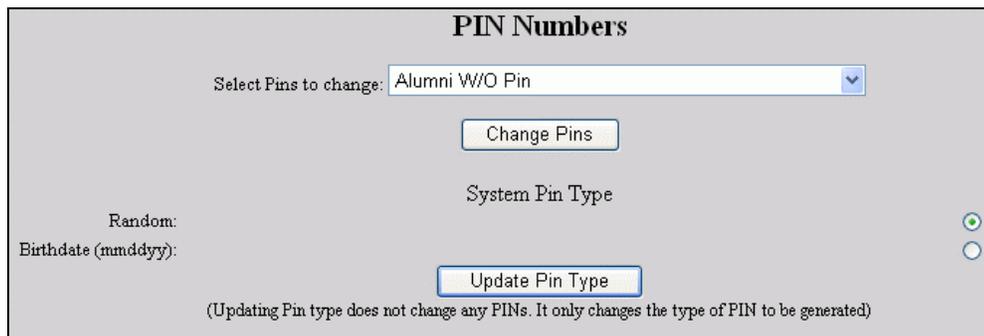Click **Names** (Figure 2), search[6] for the person by name, retrieve her or his <u>Biographic</u> record and enter or change the PIN field[7]. If the person doesn't need administrative access, you're done. He or she can access the system with the PIN and ID. The ID – also called PID – is normally the student or employee number. (If someone calls having forgotten the PIN, see page 9 for the simplest solution.)

Assigning PINs to Non-Administrator Groups

If a person is in your SONISWEB® records and has a PIN assigned in his or her Biographic record, you don't have to do anything. The steps below are needed only to assign PINs to groups that don't already have them. To emphasize the point, this is for <u>groups</u>, like the new students, not for individuals.

Click **Systems** (Figure 2) then <u>PIN Numbers</u>[8] (Figure 3, right).

Here are your choices.

• Figure 6 PIN Numbers[8] Prompt

Start at the bottom of Figure 6. Pick the <u>type</u> of PIN assigned. Choose a randomly generated number or the birthdate in each person's Biographic record (the radio buttons in Figure 6), then click the Update button. (If you change the "System Pin Type", send a note to everyone so you don't get lots of phone calls saying "I can't access the system anymore".)

Use the top to assign or change PINs for a group, <u>not</u> for an individual. The pulldown determines who will have PINs assigned or changed. Click the Change button to do it. The full list is in Figure 30, page 19.

You change the PIN for an individual in her or his Biographic record, not with this function.

See page 18 for the details.

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[6] Of course the person must be in your system and have an ID. If you don't have any record of the person, you'll need to add him or her before you can issue a PIN.

[7] The PIN field is protected so you'll only see it if you're authorized, see page 27.

[8] Yes, "PIN Number" is redundant, but so goes the language where abbreviations are used.

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Enabling or Disabling any User

(If someone calls having forgotten the Password or PIN, see page 9 for the simplest solution.)

There are three ways to do this.

4. If you're already using **Systems**, simply click Enable Logins (Figure 3, right list). You get Figure 7 where you select from the pulldown list of disabled users, Select one, and enable the login.

(A "Name" account is a student, faculty member, etc. who logs in with an ID and PIN. An "Administrative" account is a staff member who logs in with a User-ID and Password.)

• Figure 7 Enable a User's Login

• Figure 8 Enable and Disable User-IDs

5. From **Systems** you click User IDs, get a list like Figure 24 (page 16), click the underlined name of the user and see Figure 8 where you can enable and disable an Administrative user by clicking the Disabled checkbox.

6. You can also disable or enable a user by clicking the Disabled checkbox in his or her Biographic record as shown in Figure 41 on page 27.

USER PASSWORD CHANGE

If you've given them access in their profiles, users can change their own passwords.

Click **Systems** (Figure 2) then <u>Change My Password</u> (Figure 3, right). You get Figure 9.

• Figure 9 Change My Password

In Figure 9 enter your current (old) password, your new password, it's confirmation, and click the Submit button.

LOST OR FORGOTTEN PASSWORD OR PIN

If an authorized user forgets her or his password (administrators) or PIN (students, faculty, etc.), he or she can click the link **here** shown in Figure 10.

The display that results, Figure 11, requires the person to enter his or her e-mail address as stored in the preferred address record.

If there's a match in the person's database records, the password or PIN is sent by e-mail.

If there is no match, the message "**No matching records found**" is displayed. In that case, the person must contact the SONISWEB® administrator to resolve the problem.

• Figure 10 Lost or Forgotten Password or PIN
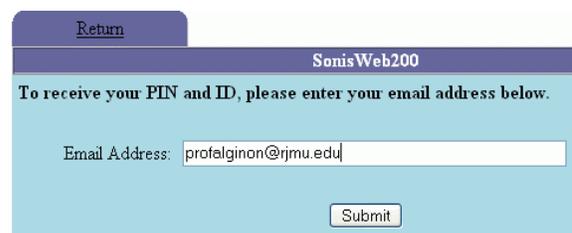
• Figure 11 ID Request Display

When the administrator determines that the user is authentic, the password or PIN is looked up:

■ For administrative users the **Systems** (Figure 2) function <u>User IDs</u> (Figure 3) shows the ID and (if you are authorized) the password. An alternative is "User Password Change" on page 9.

■ For faculty, students, etc., the **Names** (Figure 2) Biographic record contains the person's PIN.

Assigning an ID to an Administrative User
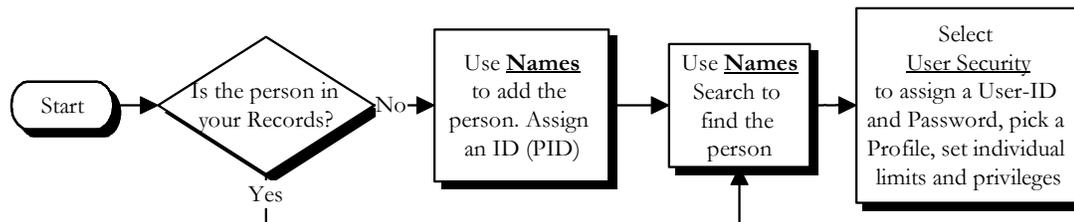
• Figure 12 Setting up an Administrator's User-ID

The user has to be present in your system to assign an administrator's User-ID as Figure 12 shows. The diagram in Figure 31 on page 22 shows the relationships amongst User-IDs, profiles, limits, and privileges.
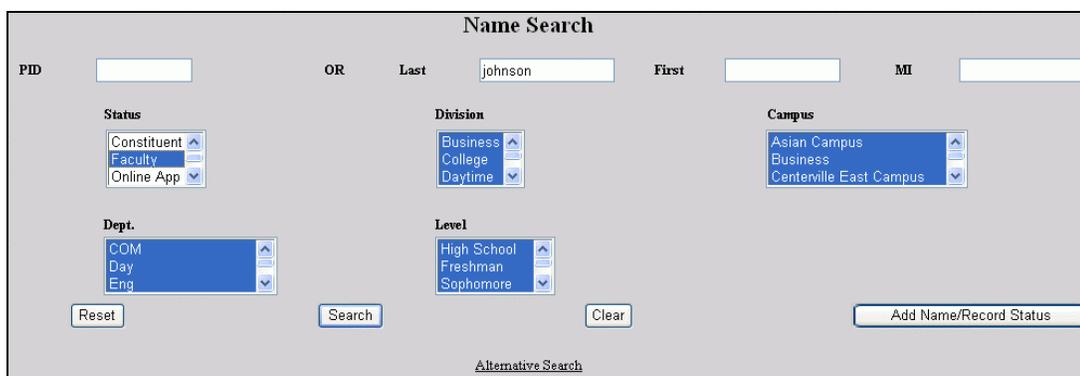
• Figure 13 Names Search

Find[9] the person with **Names** (Figure 2). Figure 13 is an example.

Click User Security (Figure 3, left list).
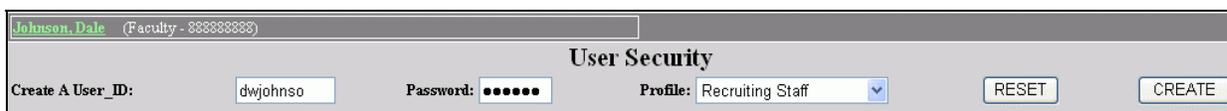
• Figure 14 User Security Display

Enter the information in Figure 14. That includes picking the proper Profile from the pull-down list. (Don't see an appropriate Profile? Check "Setting up an Administrative Profile for a Group of Users" on page 14.)

Click the Create button.

> A person can have more than one User-ID and password with different privileges and limits. For example, the SONISWEB® Administrator may want a backup User-ID and password. You use CREATE in Figure 14 to do that.

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[9] Of course the person must be in your system and have an ID. If you don't have any record of the person, you'll need to add him or her before you can issue a User-ID.

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Limits and Overrides for Individuals

After you click Create (Figure 14), Edit (Figure 21), or Replace (Figure 21) you get the displays in Figure 15 through Figure 20.

Now you get to set the <u>individual</u> limits and overrides for this person. It's really the rights of the Profile <u>minus</u> what you specify in the limits <u>plus</u> what you select in the overrides.

See "Limits and Overrides in Detail" on page 24 for the selections available with each **Yes** selection below.

User Security

User ID: dwjohnso **Profile:** Recruiter

Do you wish to limit this user's access based on department, division, campus and/or user type?

[Yes]   [No]

NOTE: User Security changes will be active the next time the user logs into SONISWeb or after the 0 cache time.

• Figure 15 Security Limits for an Individual

Yes gives you a list to choose from shown in Figure 31, page 22. This sets access <u>limits</u> to what the Profile otherwise allows. **No** removes any prior limits leaving the standard Profile access rights. It's used to limit an admissions staffer with the Clerical profile to only Applicant records for example.

User Security

Editing User ID: dwjohnso **Profile:** Recruiter

Do you wish to add additional privileges (Ex. overrides) to this user's access?

[Yes]   [No]

• Figure 16 Security Overrides for an Individual

Yes in Figure 16 gives you a list to choose from in Figure 32 on page 24. It is for <u>adding</u> privileges to what the normal Profile allows. **No** removes any prior privileges leaving the standard Profile privileges. An example is giving the Registrar the privilege to "make grades official". See Figure 40 on page 27 to see the full list of privileges.

• Figure 17 Security Limit on Holds

Yes in Figure 17 This sets access <u>limits</u> for Holds that can be placed. **No** removes any prior limits leaving the standard Profile access rights. For example, it's used to permit a financial officer to apply only financial holds but not registration holds. See Figure 34, page 25 for an example of the list of holds.

• Figure 18 Query Builder Limits

Yes in Figure 18 determines the kinds of data this person may use in constructing a query with Query Builder[10]. The details are in Figure 35 on page 25. **No** removes any prior limits leaving the standard Profile access rights.

Since most of the SONISWEB® database tables can be searched from Query Builder, you need to set limits so the person doesn't have access to information that his or her profile would otherwise prohibit. The simplest way to see what a person's profile permits is the listing described in "Displaying User Settings" shown in Figure 44 on page 30.

• Figure 19 Registration Limits for an Individual

Next comes registration settings in Figure 19. **Yes** gives you a list to choose from. It's is for <u>setting</u> registration limits and privileges beyond what the normal Profile allows. See Figure 37, page 26. **No** removes any prior registration settings leaving the standard Profile privileges.

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[10] See the manual "Query Builder" to see what it is and how it works.

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• Figure 20 Registration Prompt

Finally comes a miscellaneous display where you can cause the person to be prompted for registration choices available. With the Registration Prompt, the user can change the registration year, semester, and course type during registration as illustrated in Figure 39 on page 26.

Changing the ID of an Administrative User

First, find out what the user's current settings are because your actions below will reset them! Click **Systems** (Figure 2) then User Settings (Figure 3) to see and print the person's current authorization. You see an example in Figure 44 on page 30. With the print-out from User Settings, you know what to restore for that person.

After you've printed the current settings, find the person with **Names** (Figure 2).

Click User Security (Figure 3).

• Figure 21 User Security Change Display

Use the pulldown list in Figure 21 to select the User-ID you want to change (some people have more than one role, so have more than one User-ID). Click:

- DISABLE a user so the person cannot access your system until you enable them again as described on page 8.

- EDIT to change the User-ID.

- REPLACE to replace it all.

- DELETE to remove the User-ID.

Use the bottom of Figure 21 to add (the CREATE button) another User-ID for a person as described on page 10.

You can also add another User-ID so that a person has additional security. For example, the SONISWEB® Administrator may want a backup User-ID and password. You use CREATE in Figure 21.

If you click EDIT or REPLACE, you get the series of displays shown in "Limits and Overrides for Individuals" on page 11.

Setting up an Administrative Profile for a Group of Users

Profiles are <u>not</u> for students, faculty, applicants, and alums who use PINs. A Profile can be set for an individual or a group of administrators. The Registrar and staff have a set of records and functions that they can use and maybe a few more they can display but not change. The Financial Officer and staff have a different set of records and functions that they can use and maybe a few more they can display but not change. (After you assign a profile to a person you get to set individual differences as shown in "Limits and Overrides for Individuals" on page 11.)

Click **Systems** (Figure 2) then <u>Profile Utility</u> (Figure 3 ,right).

Profile Utility

Select A Profile To Edit   Registrar   RESET   EDIT   DELETE

Admissions Office
Alumni Management
Bursar
Create A Profile   Clerical Staff   'ode   Set all Enabled ○ Disabled ⊙   RESET   CREATE
Display Only
FundRaisersDevelopmt
Health Staff
Nursing Instructor
ReadOnly
Recruiter Student
Recruiting Staff
Recruiting Volunteer
Registrar
Student Health
System Administrator
Systems Student
Test Account

● Figure 22 Profile Utility Prompt

The bottom of Figure 22 is for creating a new profile. The **Disabled**[11] radio button is usually the best choice. It means you must select what the persons with this Profile can and cannot access. **Set all Enabled** saves time if you're going to enable most everything and just want to disable a few. **Set all Enabled** allows anyone with this profile unfettered access to everything.

The top of Figure 22 is used to modify an existing Profile. You can Delete the profile if it's not assigned to anyone. Most often you Edit it and that leads to the table on the right side of Figure 23.

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[11] Not to be confused with the DISABLE button DISABLE above that is used to disable access for a current user.

The SONISWEB logo appears at top center of page.
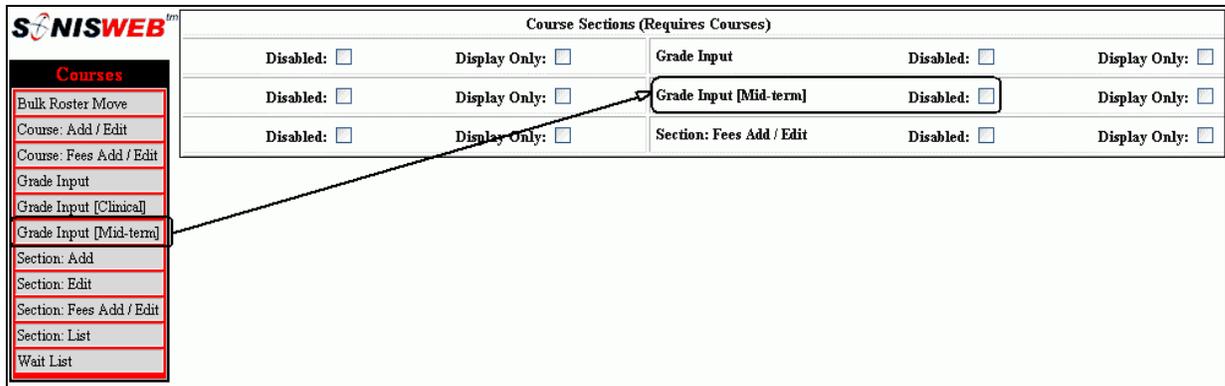
• Figure 23 Profile Table Relationship with Function List

The relationship between a Profile table item (technically stated, a Page) and what a user clicks in a function list is shown in Figure 23.

Disabled: ☑ means the page and its related record or function is not available to anyone with this Profile. It also means it will not appear among the choices in Figure 2 and Figure 3

Display Only: ☑ means you can see it but you can't change it.

Disabled: ☐   **Display Only:** ☐ means you can see it and you can change it.

Scroll down through the table, make your selections, then click the appropriate button at the bottom.

A quick way to move through lots of checkboxes in Figure 23 is to use your keyboard Tab key and Space bar. Tab to the next checkbox you want to change and press the Space bar. A checkmark is blanked. If it's blank it gets a checkmark. Tab to the next, etc. to quickly move through the list. It's faster than using the mouse.

See "Setting and Changing Profiles" on page 31 for much more detail on these tables, setting of **Start** and **Launch** pages, etc.

Checking Administrative User ID or Status

Click **Systems** (Figure 2) then <u>User IDs</u> (Figure 3, right). You use this only for people with User-IDs, not those who login with PINs..

• Figure 24 Administrative User ID List

■ Click an underlined name in Figure 24 and you get a prompt (Figure 25) to change the person's password. An alternative is "User Password Change" on page 9.

• Figure 25 Administrative User Password and Disabling

You can also Disable a person's access with the checkbox.

SONISWEB®

SETTING UP SECURITY

Internet and Database Security

In your offices and on your local area network (LAN), you control security by controlling who can attach to your LAN and who has access to your offices. Once the system is accessed from the Web, you have put SONISWEB® and its private records in a very public – and occasionally unfriendly – place. In the "Installation" text we discuss some of the choices you <u>must</u> make to assure the security of your records. Think of your records as access to your bank account and secure it accordingly. There are secure systems which support financial transactions over the Internet, so there is lots of knowledge on how to do it.

Web Browser Security Issues

The automatic password-save features of Web browsers are a special privacy problem that you should note. You can turn it off as described in the text "Browser Settings".

RJM Systems, Inc. is not responsible for your security. You are expected to employ or contract with people who can knowledgeably advise you on your security needs and see to their implementation. This includes periodic tests of your system to see that it remains secure. By installing this system, you agree to hold RJM Systems, Inc. harmless in this regard.

Security and Profiles

There are two very different groups of SONISWEB® users:

- **Most users**: can access SONISWEB® with their ID and an assigned PIN. All except faculty members can see and change only his or her records. She or he can search for others but only see address information that others have authorized to be published.

  Faculty can see the student records of those for whom they are advisors. Faculty can also see students enrolled in sections assigned to them, enter grades, etc. See the text "Faculty Handbook" for more information.

- **Administrative users**: these are the deans, officers, and administrators who access SONISWEB® with a User ID and a password. Both the User ID and the password are assigned by the SONISWEB® administrator. What administrative users can see and change is based on a role-based profile. See page 21.

MOST USERS

Most users access SONISWEB® through your Web site. They see a display that includes the choices[12] in Figure 26. Figure 4 on page 5 is a visual way to understand the access, login, and profile functions.

All except "Administrators" access the system this way:

1. In Figure 26 users click the type of access they are authorized for such as Student, Alumni, Faculty, etc. That yields a display like Figure 58 on page 40.

• Figure 26 SONISWEB® Access

2. The person enters her or his ID[13] and assigned PIN (personal identification number) in Figure 58.

• Figure 27 Faculty Access Display

3. He or she gets the appropriate record display like Figure 27. Access privileges are limited to the tabs and icons on the display.

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[12] If your organization customizes the Web pages, they may look different from this example.

[13] See "Assigning a PIN to an Individual", page 6, for the choices in ID.

Setting Up Most Users

Most of what you need to know is in "Assigning a PIN to an Individual" on page 6 and "Assigning PINs to Non-Administrator Groups" on page 7.

There are two more options you can choose; what those with PINs use as an ID and where the ID appears in the login. Normally it's the "SONIS ID" shown in Figure 28. That's their student or employee number also called ID and PID.

You can use their e-mail addresses instead of their IDs and place the Login ID on the top or the bottom of the login display.

To do either or both of those:

Click **Systems** (Figure 2) then <u>Web Options</u> (Figure 3 ,right).

As shown in Figure 28, click the pulldown[14] arrow and select which ID option you want these users to log in with. The "Email Address" choice requires that <u>everyone</u> has a working e-mail address.

In Figure 29, pick the "Login Order" from the pulldown[14] list.

Click the Submit button at the bottom of the display. You get a confirming message that the change has been made.

Where you changed the Login ID option in Figure 28, contact <u>all</u> of your users to tell them of this change in their login ID.

• Figure 28 Logon ID Options

• Figure 29 Login Location Options

This change affects all users, current and new.

Now to assigning PINs en mass; in Figure 6 you use the arrow for a pulldown list of choices. The list looks like Figure 30.

Typically you are issuing PINs to all the new students, so you choose "Students W/O Pin". When you click the Change button they all get PINs put in their Biographic records.
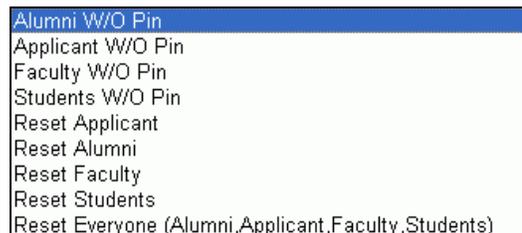
• Figure 30 Change PIN Options

Send a note to those whose PINs you have added or changed so they know how to access SONISWEB® . If you used the birth date option in Figure 6, remind them to change their

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[14] See Figure 60 on page 41 for guidance.

PIN immediately to preserve the privacy of their records. They can do that by logging on

with the PIN you assigned and then changing it using the <u>Update Bio</u> icon.

Some institution prefer to periodically erase assigned PINs so they can issue new ones. First you'd pick the appropriate Reset choice from Figure 30. As a result that group would be "without" PINs so you can then select "W/O Pin" to assign them all fresh ones.

Don't forget to contact all those whose PINs you just changed.

ADMINISTRATIVE USERS

Administrative users are the few who need wide access to records. The Registrar, the Bursar, Deans, Department heads, and administrators are typical. You assign them a User-ID and a password <u>instead</u> of a PIN[2]. They access SONISWEB® by clicking "Administrator" as shown in Figure 26.

SONISWEB® administrative user authorization works this way (see Figure 31):

- You determine the staffs or groups with similar access needs. Examples are deans, department heads, the registration staff, recruiters, admissions, and the financial staff. You define their roles based on their jobs, their needs and the requirements of the law. See "Suggestions for Profiles", page 31.

- For each staff or group you define a role and then a profile that controls what information they may see and which records they may change, add or delete. This is used to build the profile described in "Setting and Changing Profiles", page 31.

- Where possible, you determine which display each group wants to see first when they log in and set that as part of the profile.

  > One profile usually covers an entire group. The Registrar's staff typically share one profile with subtle differences set in "Limits and Overrides for Individuals" on page 11.

- With the profiles set, as you give users their User-IDs and Passwords (page 10) you select the profile that authorizes users to access the system.

- User can change their own passwords, see "User Password Change" on page 9.

ID versus PID versus User ID

ID and **PID** are synonymous. It is the "person-number" assigned to an individual. The ID-PID is normally generated automatically by SONISWEB® when you add a new user.

User-ID is the name assigned only to those who have administrative access. It is commonly the person's initials (dwj), a version of their name (gsam), or a nickname (bobmath).

(In each person's biographic record, other IDs can be stored. SSN is the place for the U.S. Social Security number. There is also an exam ID field, used heavily by law schools.)
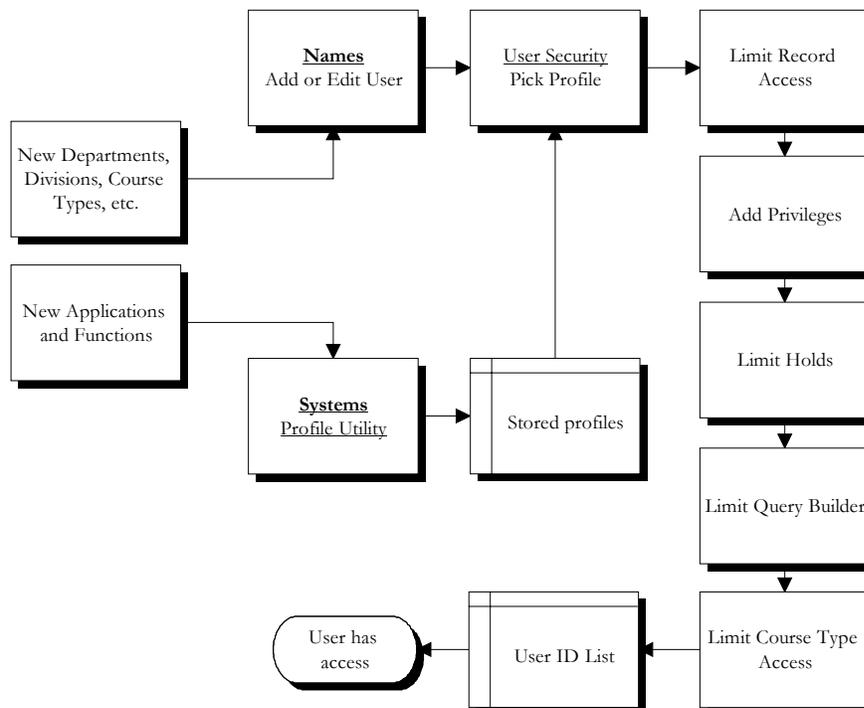
• Figure 31 User Authorization with Profiles

Figure 31 shows the complex relationships of profiles, limits, and privileges. Reading Figure 31 from top to bottom:

- **Names** is how you access the person's records so you can add or change her or his security.

- <u>User Security</u> is the function that presents the security displays. See page 8.

- After editing or adding the user's security, you get displays that allow you to limit access or add privileges. See page 11.

- When you add a new department, campus, holds, etc., you <u>must</u> change the user security of those with limits or privileges for the change to take effect. See page 11.

- When new applications[15] (SONISWEB® functions) are added, you must edit <u>all</u> the profiles for those new functions to be used. See page 22.

- **Systems** <u>Profile Utility</u> lets you add new profiles, edit existing profiles, and delete profiles you no longer need. See page 14.

To see how this process works at login, look at Figure 4 on page 5.

ADDING NEW FUNCTIONS TO ADMINISTRATIVE USER PROFILES

When you receive new SONISWEB® functions (also called applications), you must add them to those profiles that need them. It's a simple process:

---

[15] An "application" is computer terminology for a SONISWEB® function such as a **Names** Search or "Make Grades Official".

---

1. Where you use the SONISWEB® Hosted Services, the new functions are down-loaded for you. Where you've installed SONISWEB® on your server, download and extract the new functions from the RJM Web site as described in the "Administration" text.

2. Run the Scripts[16] under **Systems**.

3. If you don't know which profiles need changing, you'll have to Edit each profile as described in "Changing a Profile to Access New Functions" on page 32.

4. To find out what each administrative user has for a profile and his or her added limits and privileges, use the process in "Displaying User Settings" on page 29.

Once you've figured out which Profiles need to be changed and which users need their limits and privileges updated, you can use profile editing (page 14) and/or user security changes (page 13) to provide access to the new function.

---

[16] Most users of SONISWEB® Hosted Services have SONIS® support run the scripts for them. Check to see what your arrangement is.

AUTHORIZING AN ADMINISTRATIVE USER TO ACCESS SONISWEB®

To authorize a person for <u>administrative</u> access[17] in SONISWEB® :

■ A record for that person must already be in the SONISWEB® databases. If there's no record, you must create one. See the text "Students, Faculty, Applicant and Alumni/ae Record-keeping" for guidance.

■ You must have a role-based profile to match that person's duties and rights. If you don't find a profile that fits this person, you can create a new profile or edit an existing profile to fit. See "Setting up an Administrative Profile for a Group of Users" on page 14.

■ Once you have these done, see "Assigning an ID to an Administrative User" on page 10 to set the person up.

LIMITS AND OVERRIDES IN DETAIL

Limits

The process and displays are shown on page 11. These are illustrations of detailed displays or display contents.

• Figure 32 Optional Security Choices

Figure 32 shows the choices. You can make multiple choices as described on page 41, Figure 61. Some examples of how the choices are used:

■ For a Dean who doesn't deal with the medical campus, set her or him up with the Dean profile. Then select all campuses <u>except</u> the medical campus using the Campus list in Figure 32.

■ If you have an Evening College Registrar, authorize him or her with the Registrar profile, then pick only the Evening Division.

---

[17] See "Most Users" (page 18) for those who don't need administrator functions.

- Alumni/ae development staff can be limited to alumni records by authorizing them with the Clerical profile, then limiting record access with the Status of AL, the abbreviation for "alums".

Overrides

Some of the choices in Figure 33 affect transcripts and financial records so they have legal or liability repercussions if not carefully controlled.

The added privileges shown in Figure 33 are normally limited to one or two persons in your institution. For example, the Registrar and all her or his staff would share the Registrar profile but only the Registrar and his or her deputy would have the right to "Make Grades Official". See page 41 for guidance in making multiple selections from Figure 33.

See "Privileges" on page 27 for descriptions.

• Figure 33 Select Added Privileges

Holds Placement

There are many holds and typically you assign the right to set financial holds only to financial staff, registration holds to the Registrar's staff, etc. Make one or more selections of holds in Figure 34 and then click the Submit button.

• Figure 34 Holds Limitation

Query Builder Limitations

In picking the limits in Figure 35, check the profile assigned to the person to determine what she or he should and should not be authorized to see. Query Builder lets an authorized user search for people based on a set of criteria such as birthdate, status, etc. Without the limits set in Figure 35, users could access data that their normal profiles do not permit.
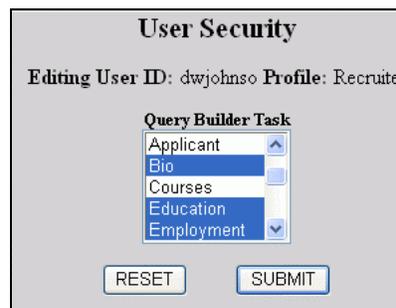
• Figure 35 Query Builder Limits

Limits During Registration

Select the course types this user may choose during registration, then click the Submit button. You may choose to have some course-type registration – advanced placement or graduate-only, for example – done only by a department chair, a dean or the Registrar.

• Figure 36 Course Type Selection

• Figure 37 Registration List by Course Type

During registration, an administrator sees a list of available course sections to choose from. Figure 37 is an illustration.

When you click the Enable checkbox[14] in Figure 38, then click the Submit button, the users of this profile will see their available course list divided into groups. Figure 37 shows what it looks like to a user. If the checkbox[14] is empty, the users see a single alphabetical list of course sections with no notation of course type.

• Figure 38 Course Type Enable Choice

• Figure 39 Registration Prompt

If you "Enable the multi-year registration option" in Figure 38, that person sees the top of the administrators' registration display shown in Figure 39. From it, the administrator can select different years and semesters and – if selections are made in Figure 36 – can select course type. If the registration prompt in Figure 38 is <u>not</u> selected, Figure 39 never appears during registration.
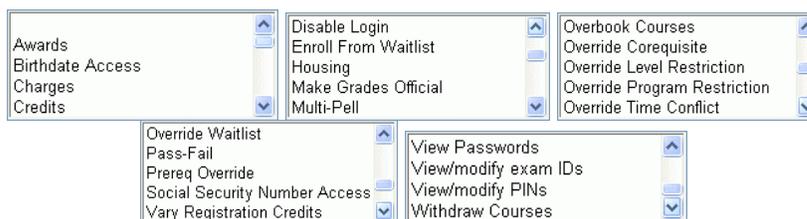
Privileges

Figure 40 Added Privileges

Privileges form a list as shown in Figure 33. The full set of entries is shown in Figure 40. They are:

Blank ( ): removes any privileges previously assigned to this person. It only makes sense when editing a User-ID.

Birthdate is named DOB in each person's Biographic record.

Awards: establish or change loan or scholarship awards.

Charges: post debit or credit charge transactions..

Credits: post credit transactions.

Disable Login: puts a checkbox in the "Disabled" field of the Biographic records. Without that checkbox, users see a Y or N but cannot change it.

• Figure 41 Biographic Disabled Checkbox

Enroll From Waitlist[18]: usually restricted to very few on the Registrar's staff.

Housing: assign housing and charges.

Make Grades Official: mark the course grades as final and official whether entered by the instructors or by administrators. You can also withdraw official grades so they can be changed.

Multi-Pell: means that the administrator can give Pell grants more than once a semester.

Overbook Courses[18]: if a course section is full, you can still add students after receiving the warning message.

Override Corequisite[18]: where a course requires a corequisite the warning message can be overridden.

Override Level Restriction[18]: where a course section requires a student to be at a certain level (year of matriculation) the warning message can be overridden.

Override Program Restriction[18]: for a course section restricted to a specified program, override and enroll a student not in that program.

---

[18] This is part of the registration process. See the SONISWEB® text "Registration by Staff".

Override Time Conflict[18]: enroll the person even though you got a warning that a time conflict exists between two course sections.

Override Waitlist[18]: enroll the person even though you got a warning that the course section had a wait list.

Pass/Fail: specify that the student only qualifies for a Pass or Fail grade even if the course includes a broader set of grades. You set this in the student's course record <u>after</u> registration.

Pereq[uisite] Override[18]: during registration, if a course prerequisite has not been met, you get a warning message that you can override.

Vary Registration Credits[18]: during registration, assign greater or fewer credits than the course default.

View Password: permits the person to view and change user passwords.

View Exam IDs: schools that use exam IDs usually keep them secret. The person with this privilege can view them in the Biographic records.
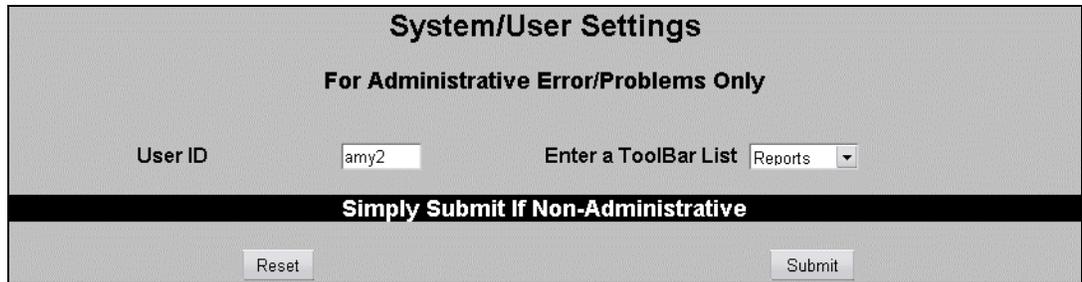
View/Modify PINs: although a person may be authorized to view Biographic records that contains PINs, that person may not see or change a person's PIN unless given this privilege.

Withdraw Courses[18]: allows the administrator to withdraw students from course sections.

DISPLAYING USER SETTINGS

The primary purpose of this function is to see what a username (user) has access to through the combination of the assigned profile and the individual limits and privileges (see Figure 4, page 5). It can also be used to see whether or not the current SONISWEB® patches have been applied.

1. Log on to SONISWEB® and select **Systems** (Figure 2).

2. Click System/User Settings (Figure 3, right). You get Figure 42.

System/User Settings

For Administrative Error/Problems Only

User ID   amy2   Enter a ToolBar List   Reports ▼

Simply Submit If Non-Administrative

Reset   Submit

• Figure 42 System/User Settings Prompt

3. To get the settings for an administrative user, enter his or her User ID in Figure 42.

4. To get permissions for a limited function like **Reports** or **Courses** select from the Tool Bar list in Figure 42.

System and User Settings (03/06/06 12:55:48 PM) - CF Version 7,0,0

Web Option Settings
- **LoginID:** SONISID
- **Body Font:** Times New Roman
- **Body Font Color:** Black
- **Run Crystal Reports:** Yes
- **Run BlackBaud Accounting:** No
- **Financial Aid Import Filter:**
- **Registration:** Basic
  - **Start:** 01-Jan-06
  - **Stop:** 30-Dec-06
  - **Year:** 200506
  - **Semester:** 1
  - **Alpha Start:** A
  - **Alpha Stop:** Z
  - **Registration Levels:** None
  - **Registration Course Types:** None
  - **Auto-Repeat:** No
  - **Student/Faculty Waitlist Override:** Yes
  - **Max. Rows Displayed:** 10
  - **Max. Credits Allowed:** 20
  - **Cart Timeout (minutes):** 5
- **System Timeouts:**
  - **SonisWEb (minutes):** 30
  - **Cache (minutes):** 0
- **Direct Biographic Updates Allowed:**
  - **Alumni:** No
  - **Faculty:** Yes
  - **Students:** Yes

• Figure 43 System Settings Display - Compressed

Figure 43 is a compressed version of a long report that you can scroll through and/or print.

When you enter an administrative user's ID in Figure 42 the bottom of Figure 43 shows the limits and privileges and the profile permissions that person has. That's shown in Figure 44.

Note that the report is sent to the SONISWEB® administrator. It is attached to that e-mail note as a text (.txt) file and contains all of the information in Figure 43-Figure 44. It's also saved as a file in batch directory.

User Security for MacFund, Bruce (MA2074287)
  Security Tasks: None
  Campus Access:
    Asian Campus (ASN001)
    Business (BUSINESS)
    Centerville East Campus (CAMP4)
    Centerville Main Campus (CAMP1)
    Centerville Medical Campus (CMED)
    Centerville North Campus (CAMP2)
    Centerville South Campus (CAMP3)
    Chatham CC Circlesville (ChathamCir)
    College (COLLEGE)
    Seminary (SEMINARY)
    To Be Determined (TBD)
  Course Type Access: All
  Department Access:
    COM (COM)
    Day (DAY)
    Eng (ENG)
    Eve (EVE)
    His (HIS)
    Law (LAW)
    Liberal Arts (LART)
    Nursing & Allied Health (NA)
  Division Access:
    Business (B)
    College (C)
    Law (L)
    Nursing (N)
    Seminary (S)
    TBD (TE)
    Winter (W)
  User Type Access:
    Alumni (AL)
    Constituent (CO)
    Faculty (FA)
    Staff (SF)
    Student (ST)

• Figure 44 Bottom of Figure 43

SETTING AND CHANGING PROFILES

If you know how to do this and don't need all the details, see the quick reference "Setting up an Administrative Profile for a Group of Users" on page 14.

Profiles cover what "pages" a user can display or can display <u>and</u> change. It sets the "page" that the user sees first. A "page" is what provides access to database records and functions (applications). If you're technically inclined, this definition helps you understand why and how SONISWEB® security works the way it does. If that's not your inclination, don't worry about it, you'll get what you need anyway.

There's a special profile called the Master Profile. It's used by the person(s) administering SONISWEB®. See "Master Profile" on page 39 for more insight.

Suggestions for Profiles

You should examine your current controls for access to paper and computer files.

Remember that faculty, students alumni/ae, and applicants can access their records with their ID and the PIN you assign. They <u>do not</u> need a profile or a User ID. See page 3, to review what can be done without administrative access.

Does a department chair need administrative access or will standard faculty access do? What about residence advisors? Do they even need administrative access? What controls do you place on giving grades, entering financial transactions, and viewing personal information? Crucial to getting profiles correct is making paper lists by the role, assignment, or job of the persons in a category. Somewhere between a single profile that lets every user change everything and a separate profile for each individual you will find the list of profiles that fit your institution and the expectations of your accrediting agency, the accountants, and your reputation for privacy. Typical users include:

- Master Administrator – also called the "superuser" – who can do almost anything, but especially customization.

- Registrar with access to student data.

- Bursar or Vice President of Finance with access to all financial records.

- Deans and Academic Vice Presidents with access to student and applicant records.

- Cashier with access to post financial transactions.

- Admissions officer with access to applicant records.

- Recruiting officer with access to recruiting records.

- Nurse or medical officer with access to student biographic and health records.

- Systems support technician with access to certain configuration and installation data.

Editing Profiles

> When you change a profile it affects <u>everyone</u> using that profile whether current or new users.

1. Log in as a SONISWEB® administrator. You must be authorized to use the profile utility.

2. Click **Systems** in the toolbar at the top (Figure 2). You get a list of authorized functions on the left side of your display like Figure 3.

3. Click <u>Profile Utility</u> from the function list in Figure 3. You get Figure 45.

• Figure 45 Profile Utility Display

4. To edit, click the pulldown[14] arrow by "Select A Profile To Edit". Click the name of the profile you wish to edit, then click the EDIT button.

5. You get the series of tables described in "Filling in the Profile Tables" on page 34. Follow the process there.

> The RESET buttons in Figure 45 simply erases what you have typed on the screen so you can start over. It <u>does not</u> reset the entire profile.

Changing a Profile to Access New Functions

When you download[16] and apply patches or new versions of SONISWEB®, you need to apply new functions to those profiles and user limits and privileges for the users who need to use them.

1. Run the Scripts[16] as the "Administration" manual shows to update the Master profile. You can check the Master Profile to make sure it's correct; see page 39.

2. With "Displaying User Settings" (page 29) find the persons and profiles that need the new records and/or functions and edit them ("Editing Profiles" above). Automatically, SONISWEB® searches for new functions then adds them to the profile as shown in Figure 47.

Adding a Profile

1. Log in as a SONISWEB® administrator. You must be authorized to use the profile utility.

2. Click **Systems** in the toolbar at the top (see Figure 2). You get a list of authorized functions on the left side of your display.

3. Click <u>Profile Utility</u> from the function list (Figure 3). You get Figure 45.

4. Look at the bottom of Figure 45. Type the name of the new profile in the field beside "Create A Profile".

5. Enter a "code" (up to a 10 characters abbreviation) that will be used in other parts of SONISWEB®.

6. Leave the Disabled button on (dark) <u>unless</u> the profile you are creating is for the SONISWEB® administrator who needs access to nearly everything.

7. Click the CREATE button.

8. You move to profile table editing described in "Filling in the Profile Tables" on page 34.

Testing a Profile

A useful way to test a new profile is to add an additional User-ID for the SONISWEB® administrator (page 10). With that "test" profile the administrator can test using her or his records.

Deleting Profiles

You must replace the assigned profile all the users of the current profile or delete their access privileges. You use **Names** > <u>User Security</u> (Figure 3) to replace the current profile with a new one; or you can delete the ID of every user of the profile. (Deleting the assigned profile doesn't remove the users from your SONISWEB® records, it just halts access to SONISWEB®.)

1. Log in to SONISWEB® . You must be authorized to use the profile utility.

2. Click **Systems** in the toolbar at the top (see Figure 2). You get a list of authorized functions in a list on the left side of your display.

3. Click <u>Profile Utility</u> from the function list (Figure 3). You get Figure 45.

4. Click the DELETE button. You get a confirmation display asking if you really mean it. Click the confirmation button and the profile is removed.

If any users are still assigned to the profile, the profile cannot be deleted. You see all valid users and their assigned profiles with the **Systems** <u>User IDs</u> function shown on page 16.

Filling in the Profile Tables

This is a trip through the profile tables with commentary to guide you in making decisions on what to select.
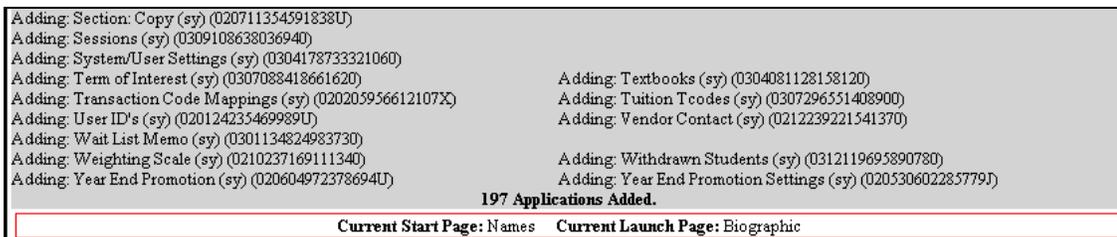
There is a special profile called "Master". It is for the key administrator of SONISWEB®. See "Master Profile" on page 39 to edit it.

When you click <u>Profile Utility</u> and select (edit) or name (add) a profile, the first display you see is either Figure 46 or Figure 47.

Profile Utility
Existing Profile - Clerical
Checking For New Applications to Add To This Profile
0 Applications Added.
Current Start Page: Names   **Current Launch Page:** Biographic

- Figure 46 Profile Utility Display with no New Applications[15]

Figure 46 shows that no new applications[15] were added since you last edited this profile. If no further changes are needed in the profile, you can quit here. Just click some other item in the function list (Figure 3) and no changes will be made to the profile.

Adding: Section: Copy (sy) (020711354591838U)
Adding: Sessions (sy) (0309108638036940)
Adding: System/User Settings (sy) (0304178733321060)
Adding: Term of Interest (sy) (0307088418661620)   Adding: Textbooks (sy) (0304081128158120)
Adding: Transaction Code Mappings (sy) (020205956612107X)   Adding: Tuition Tcodes (sy) (0307296551408900)
Adding: User ID's (sy) (020124235469989U)   Adding: Vendor Contact (sy) (0212239221541370)
Adding: Wait List Memo (sy) (0301134824983730)
Adding: Weighting Scale (sy) (0210237169111340)   Adding: Withdrawn Students (sy) (0312119695890780)
Adding: Year End Promotion (sy) (020604972378694U)   Adding: Year End Promotion Settings (sy) (020530602285779J)
197 Applications Added.
Current Start Page: Names   **Current Launch Page:** Biographic

- Figure 47 Profile Utility Display, Top

If new applications[15] are available, the bottom of Figure 46 will look like Figure 47. In that case look through the list in Figure 47 and write down the new applications[15] the users of this profile need. You'll have to set the checkmarks in Figure 49 to allow access to the "pages" related to the new applications[15].

Current Start Page: Names   **Current Launch Page:** Biographic

- Figure 48 Current Start and Launch Pages

The bottom of Figure 46 and Figure 47 has information you need to write down. As you go through the profile, the current Start and Launch pages are removed, so you need to write down what they were so you can reestablish them.

Details for the Profile Tables

Now you scroll down through the tables that determine which records and functions (technically speaking, the "pages") that people with this profile can use. Here's their meaning:

Disabled: ☑ means the page and its related record or function is not available to anyone with this Profile. It also means it will not appear amongst the choices in Figure 2 and Figure 3. For example, if all of the checkboxes for courses (Figure 49) are Disabled, the **Courses** choice in the toolbar in Figure 2 will not even appear.

Display Only: ☑ means you can see it but you can't change it.

Disabled: ☐   Display Only: ☐ means you can see it and you can change it.

> In addition to the permissions you set in Figure 49 on, you set <u>individual</u> limits and <u>individual</u> privileges as described in "Limits and Overrides for Individuals" on page 11. You do that when you give someone a User-ID and password and assign a profile to that person.

Beginning with Figure 49, we look at the tables.

A quick way to move through lots of checkboxes in these figures is to use the Tab key and the Space bar on your keyboard. Tab to the next checkbox you want to change and press the Space bar. A checkmark is blanked. If it's blank it gets a checkmark in it. Tab to the next, etc. to quickly move through the list. It's faster than using the mouse.

Courses					
Course: Add / Edit	Disabled: ☐	Display Only: ☑	Course: Fees Add / Edit	Disabled: ☐	Display Only: ☑
Section: Add	Disabled: ☑	Display Only: ☐	Section: List	Disabled: ☐	Display Only: ☑
Wait List	Disabled: ☐	Display Only: ☑			
Course Sections (Requires Courses)					
Bulk Roster Move	Disabled: ☑	Display Only: ☐	Grade Input	Disabled: ☑	Display Only: ☐
Grade Input [Clinical]	Disabled: ☑	Display Only: ☐	Grade Input [Mid-term]	Disabled: ☑	Display Only: ☐
Section: Edit	Disabled: ☐	Display Only: ☑	Section: Fees Add / Edit	Disabled: ☐	Display Only: ☑

• Figure 49 Beginning of a Profile Table[19]

Figure 49 shows the course and section part of the table. This example is for the Development and Fund Raising profile. Those with this profile assigned should be able to see (Display) but not change course information. They shouldn't even see the cost related pages.

In Figure 49 **Display Only: ☐** means that the checkmark has been removed but the Save button (see Figure 52) has not been clicked, so it's still red. If you view this after the Save button has been clicked, all without checkmarks will be black.

---

[19] Profile tables change as new functions are added to SONISWEB®, so your profile table may differ from those you see in this manual.

Records - Faculty					
Activities	Disabled: ☐	Display Only: ☐	Address	Disabled: ☐	Display Only: ☐
Biographic	Disabled: ☐	Display Only: ☐	Education	Disabled: ☐	Display Only: ☐
Employment	Disabled: ☐	Display Only: ☐	Parking	Disabled: ☐	Display Only: ☐
Parking Incidents	Disabled: ☐	Display Only: ☐	Post Tuition Tcodes	Disabled: ☐	Display Only: ☐
Salary, Faculty	Disabled: ☐	Display Only: ☐	Tests: Additional	Disabled: ☐	Display Only: ☐
User Security	Disabled: ☐	Display Only: ☐			

● Figure 50 Faculty Records Pages[19]

Following the Courses section (Figure 49) comes Financial, then the various people-pages alphabetically starting with Alumni and going through Withdrawn students. Figure 50 shows one of the shorter ones. As with the other settings, you have to answer the question, "what should someone with this profile be able to see (Display Only checked) and what should that administrator be able to change (both Disabled and Display Only blank)?"

Reports			
Activity Reports	Disabled: ☐	Advisors Listings	Disabled: ☐
Applicant Disposition	Disabled: ☐	Applications by Zip	Disabled: ☐
Attendance	Disabled: ☐	Awards Summary	Disabled: ☐
Charges / Credits Report	Disabled: ☐	Course Listing	Disabled: ☐
Course Section Listing	Disabled: ☐	Course Section Roster	Disabled: ☐
Enrollment	Disabled: ☐	Enrollment by Date	Disabled: ☐
Enrollment By Type	Disabled: ☐	Enrollment Detail	Disabled: ☐
Financials	Disabled: ☐	GPAs	Disabled: ☐

● Figure 51 Part of the Reports Pages[19]

After the people-pages you get to function pages. Figure 51 show the top part of the Reports choices. It's followed by Systems.

Finally you're at the bottom of this long set of tables and you see Figure 52.

RESET	Save Changes and Continue To Start and Launch Page Changes ☐

● Figure 52 Submit the Start Page

If you've changed you mind about the changes you made in Figure 49 through Figure 51, click the RESET button so you can start over.

If you like what you did, click the "Save…" button in Figure 52. It saves the changes and takes you to Figure 53.

Profile: Clerical				
Select A Page To Start With Upon Login-In				
Current Start Page: Names Current Launch Page: Biographic				
Courses				
Course: Add / Edit	Start Page: ⦿	Section: Add	Start Page: ○	Section: List	Start Page: ○
Course Sections				
Section: Edit	Start Page: ○				

• Figure 53 Login Start Page Profile Table[19]

It may not be obvious in Figure 53, but the original Start Page has been reset. If you want to restore it to what was there before, use what you wrote down when you saw Figure 46.

The "Start Page" is what users of this profile should see when they first logon. Your technical staff may respond mostly to user settings issues, so you'll want to specify User IDs under **Systems** as the Start Page. The Registrar uses Student Courses the most, so that should be the Start Page.

Records - Alumni				
Address	Start Page: ○	Biographic	Start Page: ⦿	Education	Start Page: ○
Employment	Start Page: ○	Interests	Start Page: ○	Licenses	Start Page: ○
Relationships	Start Page: ○	Special Needs	Start Page: ○	Tests: Additional	Start Page: ○

• Figure 54 Start Page Selection[19]

Figure 54 shows how Figure 53 was changed. The way these radio buttons Start Page: ⦿ work is that you click one and all the others are turned off. You can have one and only one Start Page for a profile.

At the bottom of the Start Page table are buttons like those in Figure 52. Use RESET to remove what you selected and start over. When you click the Save… button you may get a Launch Page like that in Figure 55.

Profile Utility

Profile: systems
Select A Page To Launch After Searching For A Name

Current Start Page: Session Monitor (sy)   Current Launch Page: Biographic

Records - Alumni

Address	Launch Page: ○	Advisors	Launch Page: ○	Biographic	Launch Page: ○
Courses	Launch Page: ○	Education	Launch Page: ○	Employment	Launch Page: ○
Interests	Launch Page: ○	Leave Status	Launch Page: ○	Licenses	Launch Page: ○
Relationships	Launch Page: ○	Special Needs	Launch Page: ○	Tests: ACT / SAT	Launch Page: ○
Tests: Additional	Launch Page: ○	User Security	Launch Page: ●		

● Figure 55 Launch Page[19]

But maybe you won't get a Launch Page. If your selections in the prior tables make it apparent to SONISWEB® that there's only one place to start and launch, it doesn't need to ask for a Launch Page, it'll take you to the end. Figure 55 is an example of where a Launch Page was necessary.

If you get a Launch Page display, at the bottom are buttons like those in Figure 52. Use RESET to remove what you selected and start over. Click the "Save…" button in Figure 56 to finish this process.

Figure 56 is the final display. You're done with this profile.

Profile Utility

Profile: FundRDev
Start Page: "NAMES" Launch Page: CO Payment History

| Launch Start Page from NAMES. Save Profile |

● Figure 56 Final Profile Display

MASTER PROFILE

Somebody has to be able to access everything. That somebody gets the "Master" profile. She or he is usually the primary SONISWEB® administrator.

Normally you access the master profile only to check that new functions (applications[15]) were added by the scripts.

1. Log in as a SONISWEB® administrator. You must be authorized to use the master profile function.

2. Click **Systems** in the toolbar at the top (see Figure 2). You get a list of authorized functions on the left side of your display.

3. Click Master Profile from the function list (Figure 3). You get Figure 57.

Click the Update button in Figure 57 to add new functions if the scripts failed to add them. You also get profile tables just like Figure 49 through Figure 51.

• Figure 57 Master Profile Display

We advise that the SONISWEB® administrator set up at least two security records for him- or herself, one as system administrator, the second as a backup. If the system inadvertently disables the system administrator's User-ID, the backup User-ID can be used to enable the system administrator User-ID.

SONISWEB®

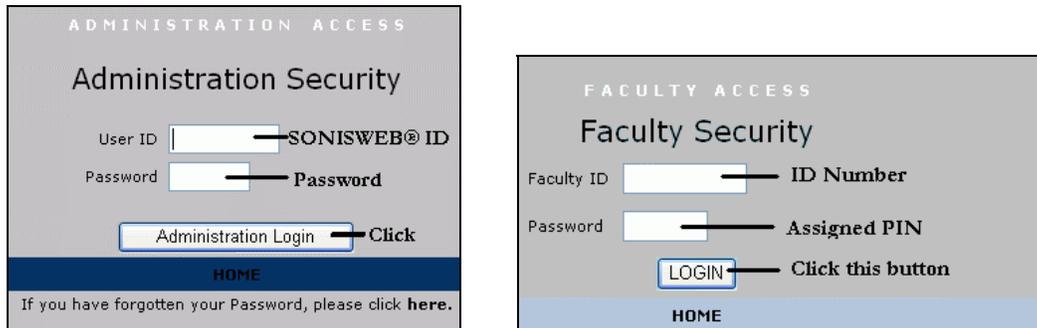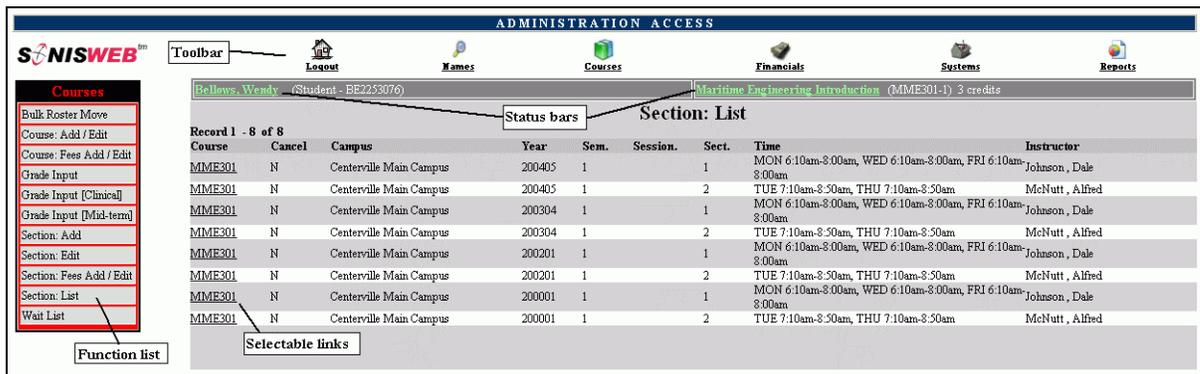# GETTING STARTED - LOG IN AND THE USE OF TABS, BUTTON AND FIELDS

Figure 58 Login Displays

To log in as an administrator, select that option from your Web page. The standard SONISWEB® login pages look like Figure 58.

• Figure 59 Typical SONISWEB® Page

Figure 59 is a typical SONISWEB® page. The actions authorized in your profile appear at the top, called the **Toolbar**.

When you make a selection from the **Toolbar**, the applicable **Function List** appears on the left. Only the functions authorized in your assigned profile and your individual limits and privileges appear. Some might have only **Courses** in the toolbar and only Course: Add/Edit for functions.

Not apparent on the display is whether or not the profile permits editing or changing the information. Once the you select a function from the list on the left, you will see a Submit or similar button at the bottom of the display if you have the permissions to add, edit, or delete the data.

By clicking a **Status Bar** you quickly return to the "person" or the "course" you were processing even if you left it temporarily to look at a financial display or a report. Of course, if you have not selected a person with **Names** or a course with **Courses**, there will be no **Status Bars** at the top.

In Figure 59 click an underlined **Selectable Link** and you go to that record.
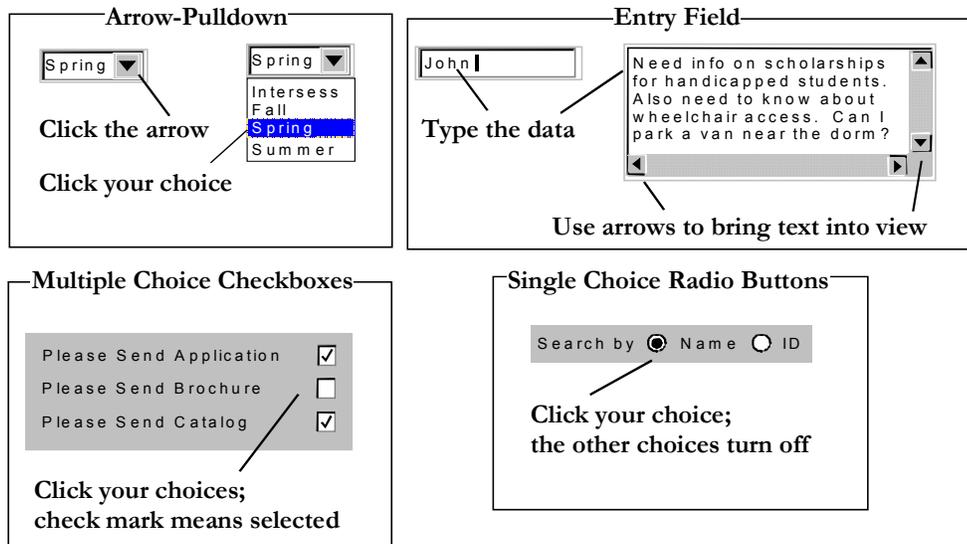
Figure 60 Arrows, Fields, Checkboxes and Buttons

SONISWEB® prompts you for information with windows like those in Figure 60. Use your mouse to click your selection.

- Once you have made your selection(s), you must click an action button; usually it is Submit, Delete, Reset, etc.

- For Entry Fields, click the beginning of the field so you don't get any blanks inserted in front of your entry.

- With Multiple Choice Checkboxes, each time you click a box it goes from selected (check mark) to unselected (no check mark). Click it again and it is selected, etc.

- Radio Buttons allow only one to be selected; when you click one, all the others are turned off.

Some SONISWEB® lists permit you to make multiple choices. It works just like most PC spread sheet software.

- To pick two or more in a series, click the top selection, hold down the **Shift** key on the keyboard and click the bottom item in the series. Release the shift key and they are selected as shown on the left and middle of Figure 61.
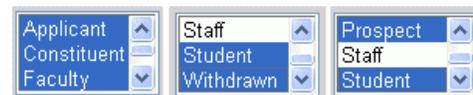
• Figure 61 Selecting Multiple Choices

- To pick two or more that are <u>not</u> adjacent, click the first item, hold the **Ctrl** key on the keyboard, select the next item and the next, etc. When you have picked the last item you want, release the **Ctrl** key and you see the selections like those on the right of Figure 61.