



ADMINISTRATOR'S GUIDE – Account Creation

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WebBalanced Office ACCOUNT CREATION

WELCOME TO ACCOUNT CREATION

Screen Purpose

Administrators can access WebBalanced's online account creation sign-up from the WebBalanced Technologies homepage at <http://www.webbalanced.com>. Click on the WebBalanced or WebBalanced for Libraries icon to begin the account creation process. The Welcome To Account Creation screen identifies system requirements. Creating your WebBalanced Account online is a simple process for the Administrator who enters basic corporate or library, contact, and product setup information.

WebBalanced requires NO additional equipment, NO use of resources on current servers, and NO additional IT time for server maintenance. WebBalanced's **Smart Plug-in** configures itself automatically to any Internet gateway. There are no time-consuming setup steps or troubleshooting required. The WebBalanced plug-in works with the following operating systems: Windows NT, 2000 Professional, XP Home Edition, XP Professional, Millennium, 98 and 95. Windows 95 must be OSR2 compliant with Winsock 2.0 support. WebBalanced's minimum browser requirements are: Internet Explorer 4.1 or greater; Netscape Communicator 4.7x or greater; Netscape Navigator 6.x or greater, Firefox 1.0 or greater. WebBalanced is optimized for Windows 98 or later and Internet Explorer 5.x or greater.

Screen Data Fields

None.

Screen Options

NEXT [Continues to the License Agreement screen.]

LICENSE AGREEMENT

Screen Purpose

The **License Agreement** is an electronic end-user license that acknowledges you accept all the terms and conditions of the agreement by installing WebBalanced. It is recommended that you read the License Agreement in its entirety.

Screen Data Fields

None.

Screen Options

BACK. The BACK button returns you to the Welcome To Account Creation screen.

I ACCEPT. By clicking on the I ACCEPT button, you are accepting the terms of this License Agreement. You must accept the terms of this License Agreement to setup your

WebBalanced Account. Accepting the License Agreement brings you to the Corporate Account Information screen.

I DO NOT ACCEPT. If you do not accept the terms of this License Agreement by clicking on the I DO NOT ACCEPT button, you are directed to the Cancel My Account Setup and Installation screen where you can choose to cancel the account creation process. Click YES to cancel account creation and you are redirected to the WebBalanced Technologies homepage (<http://www.webbalanced.com/>); or click NO to return to the License Agreement screen.

WEBBALANCED ACCOUNT AND CONTACT INFORMATION

Screen Purpose

The **WebBalanced Account Information** screen is where the Administrator enters basic contact information.

Screen Data Fields

The following account and contact information is required unless otherwise noted to establish a WebBalanced Account:

ACCOUNT INFORMATION

- Company Name [Error Message: You must enter your company name]
- Address [Error Message: You must enter your street address]
- Address 2 [Not Required]
- City [Error Message: You must enter your city]
- State/Province [Choose from drop menu; if not listed, choose "Unknown/Foreign"]
- Postal Code [Error Message: You must enter your zip code]
- Country [Choose from drop menu]
- Key Code [Populated or type in code number given to you by WebBalanced; numeric data only with maximum six (6) digits; Error Message: You must enter a number for the key code]

CONTACT INFORMATION

- First Name [Error Message: You must enter a contact first name]
- Last Name [Error Message: You must enter a contact last name]
- Title [Not required]
- Email Address – e.g., <mailto:john@domain.com>[Error Message: You must enter your current email address (example: <mailto:john@domain.com>).]
- 10-Digit Phone # - area code and number
 - Error Message 1 - Blank: You must enter your phone number
 - Error Message 2 – Letters in Phone Number Field: This phone number contains an invalid character. Please enter a phone number with 10 digits in the format 555-555-5555
 - Error Message 3 – Digit Length: This phone number does not contain the correct number of digits. Please enter a phone number with 10 digits in the format 555-555-5555]
- Extension [Not required]

- Fax Number [Not required; Error Message 1 - Blank: You must enter your phone number; Error Message 2 – Letters in Phone Number Field: This phone number contains an invalid character. Please enter a phone number with 10 digits in the format 555-555-5555; Error Message 3 – Digit Length: This phone number does not contain the correct number of digits. Please enter a phone number with 10 digits in the format 555-555-5555]
- Sign up for WBT Newsletter [checked by default]

Screen Options

BACK. Click **BACK** to return to the **License Agreement** screen.

NEXT. Click **NEXT** to continue to the **Product Setup Information** screen.

CANCEL. If you want to cancel the WebBalanced account creation process, click the **CANCEL** button. This brings you to the **Cancel My Account Setup and Installation** screen. Click **YES** to cancel account creation or **NO** to return to the **Corporate Account Information** screen.

PRODUCT SETUP INFORMATION

Screen Purpose

The **Product Setup Information** screen provides the Administrator product setup options, including identifying the primary Administrator of the WebBalanced Account, number of employees or workstations accessing the Internet, types of network/protocols, Internet access methods and WebBalanced login option (Network Authentication or WebBalanced Login).

Screen Data Fields

The following product setup options are displayed:

WHO WILL BE THE PRIMARY ADMINISTRATOR ACCESSING MANAGEMENT CONSOLE?

User Name [Default 'Administrator'; Error Message: You must enter a User Name for your Administrator]

Password

Confirm Password [Error Message: Your passwords must match before you continue]

First Name [populated]

Last Name [populated]

Title [populated]

Email [populated]

HOW MANY EMPLOYEES OR WORKSTATIONS ACCESS THE INTERNET?

Enter a number from 0-9999

WHAT TIME ZONE ARE YOU IN?

Select the appropriate time zone from the drop-down list

HOW DO YOU WANT YOUR POLICY'S TIME/DATE VALUES AUTHENTICATED?

Choose ONE of the following options by clicking on the radio button of your choice:

Use the Time/Date value passed from my workstations

Use the WebBalanced Servers to calculate a Time/Date value based on my Time Zone [**default**]

USER LOGIN PREFERENCE TO WEBBALANCED?

Choose ONE of the following options by clicking on the radio button of your choice:

Use Network Authentication [**Default** ; A WebBalanced login is NOT required]

If you elect to use this setting, users will be authenticated via their Windows logon name. However, if you have multiple users accessing a workstation using a single log on name, you should consider using WebBalanced Authentication to insure accurate reports.

Force users to log into WebBalanced whenever accessing the Internet [Must enter User Name and Password]

Using this setting will cause a popup to appear when a user opens a browser session, requesting their WebBalanced name and password as assigned by the account administrator

WHAT KIND OF ORGANIZATION ARE YOU?

Select an appropriate choice from the drop-down list

Screen Options

BACK. Click **BACK** to return to the Corporate Account Information screen.

NEXT. Click **NEXT** to continue to the **Verify Information** screen.

CANCEL. If you want to cancel the WebBalanced account creation process, click the **CANCEL** button. This brings you to the **Cancel My Account Setup and Installation**

screen. Click **YES** to cancel account creation or **NO** to return to the **Product Setup Information** screen.

VERIFY INFORMATION

Screen Purpose

This screen provides the opportunity to verify or edit Organization and Product Setup information, particularly email addresses identified for your organization's contact person and account Administrator.

Screen Data Fields

None. The Organization Information and Product Setup Information data fields are populated with previously entered information.

Organization Information:

- Company Name
- Address Line 1
- Address Line 2
- City
- State
- Postal Code
- Country
- Key Code
- Contact Person
 - Name
 - Title
 - Email
 - Phone Number
 - Extension
 - Fax Number

Product Setup Information

- Administrator Account
 - User Name
 - Password
 - Full Name
 - Title
 - Email
- Number of Workstations accessing the Internet
- Policy Date/Times will be authenticated
- Organization Type
- User Login Method

Screen Options

CLICK HERE . Returns to the **Corporate Account Information** screen to edit Organization Information values. On the **Corporate Account Information** screen, click

NEXT after editing desired information. Then click **NEXT** on the **Product Setup Information** screen to return to the **Verify Information** screen.

CLICK HERE . Returns to the **Product Setup Information** screen to edit Product Setup Information values. On the **Product Setup Information** screen, click **NEXT** after editing desired information to return to the **Verify Information** screen.

CREATE ACCOUNT . Create your WebBalanced Account with the Corporate Account and Product Setup Information you provided. The process continues to the **Account Created!** screen.

CANCEL. If you want to cancel the WebBalanced account creation process, click the **CANCEL** button. This brings you to the **Cancel My Account Setup and Installation** screen. Click **YES** to cancel account creation or **NO** to return to the **Product Setup Information** screen.

ACCOUNT CREATED!

Screen Purpose

You successfully established your WebBalanced Account. An email message has been sent to your Contact Person and Account Administrator containing your Organization ID number and the information necessary to complete the process, including how to access WebBalanced's Management Console.

If you are using a spam filter, you should immediately adjust the settings to allow messages from the webbalanced.com domain.

Screen Data Fields

None.

Screen Options

GO TO WEBBALANCED.COM. Sends you to WebBalanced Technologies homepage.

CLOSE WINDOW. Click on the **CLOSE WINDOW** button to return to your application or desktop.

SAMPLE EMAIL

To Mr. Administrator:

Thank you for choosing WebBalanced (WBO), the next generation of Internet Access Management (IAM) software that is 100% Web-based.

Your Account has been setup with the following parameters:

- Organization ID Number: 2149
- Administrator User Name: Administrator
- Administrator Password: password

TO FINISH THIS SETUP PROCESS AND CONFIGURE YOUR ORGANIZATION'S POLICIES,
CLICK HERE-> < <http://console.webbalanced.net/default.asp?openguide=yes>>.
YOU WILL BE TAKEN TO WEBBALANCED'S MANAGEMENT CONSOLE LOGIN SCREEN AND THE QUICK START GUIDE WILL OPEN IN A SEPARATE WINDOW.
PLEASE
REVIEW THIS GUIDE AND THEN ENTER YOUR ADMINISTRATOR USER NAME,
PASSWORD
AND ORGANIZATION ID NUMBER IDENTIFIED ABOVE TO LOG INTO THE
MANAGEMENT
CONSOLE.

You have 30 days to try WBO. AT ANY TIME, you can access the GO LIVE screen in WebBalanced's Management Console to complete the contact and billing information to activate your WebBalanced Account.

Please review the following highlights about the Management Console:

1. The Administrator and Users with 'View Reports' privileges must use the Organization ID Number sent to you in this email, in combination with their User Names and Passwords, to log into WebBalanced's Management Console. Please write it down and keep it in a safe place.

2. The Management Console is a secured area online where you can manage characteristic sets, policies, users, groups, and workstation IPs as well as generate/print reports, and download the latest version of the WebBalanced plug-in installation and uninstall files for workstations.

3. The WebBalanced Quick Start Guide for Administrators will be displayed in a separate window for viewing when you enter the Management Console from this link:
< <http://console.webbalanced.net/default.asp?openguide=yes>>. This Guide highlights the five basic steps to managing your account, including getting started in the Management Console and downloading the WebBalanced plug-in for workstations. Please save and/or print this Quick Start Guide for future reference on how to navigate and manage the Console.

4. For more detailed information about the features, power, and flexibility of WebBalanced, the Administrators Guide is accessible via the HELP link in the Management Console. This Guide and WBO's Reports Guide are available for downloading in Acrobat Reader PDF formats through the SUPPORT link on WebBalanced Technologies homepage < <http://www.webbalanced.com/>>.

5. For easy subsequent access to the Console, please enter this link in your browser's Favorites folder or desktop shortcut:
< <http://console.webbalanced.net/>>.

Remember, AT ANY TIME, you can access the GO LIVE screen in WebBalanced's Management Console to complete the contact and billing information to activate your WebBalanced Account.

If this email does not identify your Organization ID Number, Administrator User Name and Administrator Password, or you are unable to access the Management Console, please contact WebBalanced Technical Support at support@webbalanced.com.

WebBalanced Technologies