



# Gateway Contact Management Guide

- General Information . . . . . 2
- Assign a contact to a role . . . . . 3
- Add a new contact . . . . . 4
- Edit a contact’s personal information . . . . . 5
- Remove a contact from your contact list . . . . . 6
- Add an additional role . . . . . 7
- Remove an additional role . . . . . 8
- Override an inherited contact . . . . . 9
- Remove overridden contacts (return to inherited) . . . . 10
- After Hours Opt-Out . . . . . 11
- After Hours Resume . . . . . 12

## Please Review

**Contacts** are individuals and their personal information such as name, title, phone & email.

**Roles** are functions contacts are assigned to based on the **OARnet Contact Policy & Role Definitions**.

The contact list allows you to maintain personal information in one location. You can then apply a contact to one or multiple roles.

**Users** are people who have been authorized and registered with a user name and password to view the Gateway resources.

**Gateway Editors** are users with edit access and **only they** can modify contact and role information. Please see **Gateway User & Editor Guide** for queries about registration, view and edit access on the Gateway, **including how to be a Gateway Editor**.

A contact functions **differently** than a user, a user is someone who has been authorized and registered with a user name and password to view the Gateway resources.

A Gateway Editor is **not** the same as the Administrative Contact. While the same individual has the ability to be both, they are two separate functions. A Gateway Editor is a registered user who has edit access on the Gateway. While the Administrative Contact fulfills duties outlined in the OARnet Contact Policy & Role Definitions.

**Linked Accounts** If a contact happens to also be a registered user, their personal information will be linked automatically via email address. Their personal information only needs maintained in one place (for example: if jdoe@email.org is a user and Listed Contact, and their phone number changes, you only have to change their phone number in one place).



## General Information

### Listed Contacts

Personal information such as name, phone and email.

View & manage your list of contacts by going to Contacts in sub-menu of the Contacts section.

### Roles

Contacts are assigned to roles. Contacts can be assigned to multiple roles. Review the **OARnet Contact Policy & Role Definitions** at [www.oar.net/support/policies](http://www.oar.net/support/policies).

View role assignments by going to Roles in sub-menu of the Contacts section.

### Gateway Editors

Editors are users with edit access and **only they** can modify contact and role information. Please see **Gateway User & Editor Guide** for queries about registration, view and edit access on the Gateway, including **how to be a Gateway Editor**.

View Gateway Editors by going to Users in the main menu.

### Client & Location Structure

If you are a parent client, you will be able to see your sub-clients' information. Sub-clients can only see their information, and that of their children (this includes contacts, users and editors). Sub-clients can have their own contacts, users and editors.

**Sub-clients inherit parent client contacts unless they are overridden.**

Parent / Sub-client relationship is determined on an administrative case-by-case basis.

You can set location specific roles. **By default, all of your locations inherit roles from "main" unless you override them.**

If you are a parent client, you can select your sub-clients here.

Location selection

### Navigation

Annotations for the screenshot:

- Header menu:** oar.net | Service Desk | My Profile | Logout
- Main menu:** Contacts | Users | Stats
- Sub-menu:** Roles | Contacts | Role Definitions
- Client selection:** Client: Test Client
- Location selection:** Client SN: TESTTWO, Site: MAIN, Site SN: TESTTWO
- Management actions:** Manage contacts, Manage the role assignments, Manage your contact list and contacts' personal information (names, phone numbers, etc...)
- See who has Gateway view and edit access from your organization.** (points to My Profile)

Contact Role	Name	Email	Title	Office	Mobile	
Administrative	?					✎
After Hours 1	?					✎

### Location Selection

Annotations for the screenshot:

- Location selected:** Site: TESTTWO Sit...
- Black text indicates the role has been locally overridden:** Administrative (Joe Test Smith Test), After Hours 1 (Jane Doe)
- Gray entries indicate contact roles are inherited. You can override by clicking the edit button and assigning a new contact.** (points to After Hours 1)

Contact Role	Name	Email	Title	Office	Mobile	
Administrative	Joe Test Smith Test	jsmith@email.org	Test Title	555-555-5555		✎ ✕
After Hours 1	Jane Doe	jdoe@client.org	Director	555-555-5555		✎



To follow these instructions make sure you are in the **Contacts** section in the main menu and that you are a **Gateway Editor**.

### Assign (or replace) a contact to a role

1. Click **Roles** in the sub-menu.
2. Click the **edit icon** to the right of the role.
3. Choose the contact you want to assign to role or create a new contact.
  - Click **Add New Contact** to add a new contact. Fill in the form, click **Save** and then return to the role.
4. Click **Save**.

or



To follow these instructions make sure you are in the **Contacts** section in the main menu and that you are a **Gateway Editor**.

### Add a new contact

The contact list allows you to maintain contact data in one location. You can then apply a contact to one or multiple roles.

1. Click **Contacts** in the sub-menu.
2. Click **Add Contact** (bottom of table).
3. Fill in the required fields (and optional fields as desired).
  - **NOTE:** First, Last, Title, Email and at least one phone number are required.
4. Click **Save**.

**NOTE** If a contact happens to also be a registered user, their personal information will be linked automatically via email address. Their personal information only needs maintained in one place (phone number, name, etc....)

oar.net | Service Desk | My Profile | Logout

Client: Test Client

All Clients **Contacts** Users Stats

Roles **Contacts** Role Definitions

Client SN: TESTTWO  
 Site: MAIN  
 Site SN: TESTTWO  
 Site Address: Please submit your address to the Service Desk

oar.net | Service Desk | My Profile | Logout

Client: Test Client

All Clients **Contacts** Users Stats

Roles **Contacts** Role Definitions

First	Last	Title	Email	Office	Mobile	User
Jane	Doe	Director	jdoe@client.org	555-555-5555		No
Joe Test	Smith Test	Test Title	jsmith@email.org	555-555-5555		No

Add Contact

This will tell you if a contact is also a user

3

First name:  
Jane

Last name:  
Doe

Title:  
Director

Email:  
jdoe@client.org

Office phone:  
555-555-5555

Office phone ext:  
[ ]

Mobile phone:  
[ ]

Cancel 4 Save



To follow these instructions make sure you are in the **Contacts** section in the main menu and that you are a **Gateway Editor**.

### Edit a contact's personal information

1. Click **Contacts** in the sub-menu.
2. Click the **edit button** to the right of the contact.
3. Make the desired changes.
4. Click **Save**.

**NOTE** Contact and user information is linked automatically by email address. If you change a phone number, title, etc..., of a contact it will also update the user's account. The menu will show if the contact is also a user.

OARnet An OH·TECH Consortium Member Gateway | Contacts

oar.net | Service Desk | My Profile | Logout

Client: Test Client

All Clients **Contacts** Users Stats

Roles **Contacts** Role Definitions

Client SN: TESTTWO  
 Site: MAIN  
 Site SN: TESTTWO  
 Site Address: Please submit your address to the Service Desk





OARnet An OH·TECH Consortium Member Gateway | Contacts

oar.net | Service Desk | My Profile | Logout

Client: Test Client

All Clients **Contacts** Users Stats

Roles **Contacts** Role Definitions

First	Last	Title	Email	Office	Mobile	User
Jane	Doe	Director	jdoe@client.org	555-555-5555		No  
Joe Test	Smith Test	Test Title	jsmith@email.org	555-555-5555		No  

Add Contact

This will tell you if a contact is also a user

**3**

First name:  
Jane

Last name:  
Doe

Title:  
Director

Email:  
jdoe@client.org

Office phone:  
555-555-5555

Office phone ext:

Mobile phone:

Cancel **4** Save



To follow these instructions make sure you are in the **Contacts** section in the main menu and that you are a **Gateway Editor**.

### Remove a contact from the contact list

**NOTE** If a contact is assigned to a required role, you **must** assign a new contact to that role, per OARnet Contact Policy.

Removing a contact does not remove a user's access (users have registered access accounts you may have users who do not need to be contacts and vice versa). Please see the **Gateway User & Editor Guide** to learn how remove users.

1. Click **Contacts** in the sub-menu.
2. Click the **delete icon (x)** to the right of the name.
3. Click **Yes**.

1

The screenshot shows the OARnet Gateway | Contacts page. At the top left is the OARnet logo and name. Below it, it says "An OH·TECH Consortium Member". The page title is "Gateway | Contacts". On the right, there are navigation links: "oar.net", "Service Desk", "My Profile", and "Logout". Below the header, there is a "Client:" dropdown menu set to "Test Client". To the right of the dropdown are tabs: "All Clients", "Contacts" (highlighted in blue), "Users", and "Stats". Below the client information, there are fields for "Client SN: TESTTWO", "Site: MAIN", "Site SN: TESTTWO", and "Site Address: Please submit your address to the Service Desk". On the right side, there are more tabs: "Roles", "Contacts" (highlighted in yellow), and "Role Definitions".

2

The screenshot shows the OARnet Gateway | Contacts page with a table of contacts. The table has columns: "First", "Last", "Title", "Email", "Office", "Mobile", and "User". There are two rows of contact data. The first row is for Jane Doe, Director, with email jdoe@client.org and office 555-555-5555. The second row is for Joe Test Smith Test, Test Title, with email jsmith@email.org and office 555-555-5555. In the "User" column, there are "No" entries and a delete icon (an 'x' in a square) next to each name. The delete icon for Joe Test is highlighted in yellow. A blue arrow points from the text "This will tell you if a contact is also a user" to the delete icon.

3

The screenshot shows a confirmation dialog box with the text: "Are you sure that you would like to delete this contact?". Below this is a note: "Note: They will still remain a user able to log in." The contact name "Joe Test Smith Test - TESTTWO" is displayed. At the bottom, there are two buttons: "No" and "Yes". The "Yes" button is highlighted with a yellow border.

This will tell you if a contact is also a user



To follow these instructions make sure you are in the **Contacts** section in the main menu and that you are a **Gateway Editor**.

**Add an additional role**

1. Click **Roles** in the sub-menu.
2. Click **Add Role**.
3. Select the role you want to add.
4. Select the contact you want to apply to the role.
  - Click **Add New Contact** to add a new contact. Fill in the form, click **Save**.
5. Click **Save**.

**1**

Client: Test Client

Location: TESTTWO Site B

Address: Please submit your address to the Service Desk

CN: TESTCLIENT1

LN: TESTTWO-SITEB

Contact Role	Name	Email	Title	Office	Mobile
Administrative	Jane Doe	jdoe@client.org	Director	555-555-5555	
After Hours 1	Jane Doe	jdoe@client.org	Director	555-555-5555	
After Hours 2	May Spring	email@email.com	Executive	555-555-5555	
After Hours 3	Emily Miller	email@email.com	Engineer	555-555-5555	
Billing	Sam Clementine	email@emailtest.org	Engineer	555-555-5555	
Escalation 1	Emily Miller	email@email.com	Engineer	555-555-5555	
Escalation 2	Emily Miller	email@email.com	Engineer	555-555-5555	
Escalation 3	Sam Clementine	email@emailtest.org	Engineer	555-555-5555	
Executive	May Spring	email@email.com	Executive	555-555-5555	
Last Resort	May Spring	email@email.com	Executive	555-555-5555	
Maintenance	Joe Smith	jsmith@email.org	Engineer	555-555-5555	
Security	Joe Smith	jsmith@email.org	Engineer	555-555-5555	

**2** Add Role

**3**

Site: TESTTWO Site B

**Select Role**

Administrative

**Select Contact**

September June - email123@email.com

Add New Contact

**5** Cancel Save

or

**4**

Site: TESTTWO Site B

**Select Role**

Administrative

**Select Contact**

Select a contact...

Add New Contact

Cancel Save

First name:

Jane

Last name:

Doe

Title:

Director

Email:

jdoe@client.org

Office phone:

555-555-5555

Office phone ext:

Mobile phone:

Cancel Save



To follow these instructions make sure you are in the **Contacts** section in the main menu and that you are a **Gateway Editor**.

### Remove an optional or additional contact role

If you have multiple required roles, you will only be able to remove the additional role(s). For example, if you have two Administrative contact roles, it will only allow you to delete one of them. If you need to change the contact in the role, you can use the edit button to reassign the contact.

Contacts in Optional Roles can always be removed.

1. Click **Roles** in the sub-menu.
2. Click the **delete icon (x)** next to the role you wish to remove.
3. Click **Yes**.

1

Client: Test Client

Client SN: TESTTWO

Site: MAIN

Site SN: TESTTWO

Site Address: Please submit your address to the Service Desk

Contact Role	Name	Email	Title	Office	Mobile	
Administrative	Joe Test Smith Test	jsmith@email.org	Test Title	555-555-5555		
Administrative	Jane Doe	jdoe@client.org	Director	555-555-5555		
After Hours 1	Jane Doe	jdoe@client.org	Director	555-555-5555		
After Hours 2						
After Hours 3						
Billing						
Escalation 1						
Escalation 2						
Escalation 3						
Executive						
Last Resort						
Maintenance						
Security						

Add Role

3

Are you sure you want to remove "Joe Test Smith Test - TESTTWO" from the Administrative role?

No Yes





To follow these instructions make sure you are in the **Contacts** section in the main menu and that you are a **Gateway Editor**.

### Override an Inherited Contact

By default, locations inherit contacts from the primary parent site, these appear in gray. Gateway Editors can override and/or add more roles on a site level.

1. Click **Roles** in the sub-menu.
2. Select the site you would like to edit.
3. Click the **edit icon** to the right of the role.
4. Choose the contact you want to assign to role.
  - If the contact does not exist, click **Add New Contact**. Fill in the form, click **Save**, return to the roles.
5. Click **Save**.
6. The role will now appear in black, indicating it has a local override.

You can add additional or optional site specific roles as well by following the "add role" instructions in this document (click **Add Role** at the bottom of the roles).

1 Client: Test Client All Clients **Contacts** Users Stats

2 Client SN: TESTTWO **Roles** Contacts Role Definitions

Site: TESTTWO Site...  
 Site SN: TESTTWO-SITEB  
 Site Address: Please submit your address to the Service Desk

Client Side \*Gray entries indicate inherited contacts from parent entity. May change or add site specific contacts below.

Contact Role	Name	Email	Title	Office	Mobile	
Administrative	Jane Doe	jdoe@client.org	Director	555-555-5555		✎
After Hours 1	Jane Doe	jdoe@client.org	Director	555-555-5555		✎
After Hours 2						✎
After Hours 3						✎
Billing						✎

Gray indicates contacts are inherited.

4 Site: TESTTWO

**Administrative**

Select Contact

Jane Doe - jdoe@client.org

Add New Contact

5

or 4

Site: TESTTWO Site B

Select Role

Administrative

Select Contact

Select a contact...

Add New Contact

Contact role will now appear black, indicating it has a local override.

6 Client Side \*Gray entries indicate inherited contacts from parent entity. May change or add site specific contacts below.

Contact Role	Name	Email	Title	Office	Mobile	
Administrative	Joe Test Smith Test	jsmith@email.org	Test Title	555-555-5555		✎ ✕
After Hours 1	Jane Doe	jdoe@client.org	Director	555-555-5555		✎



To follow these instructions make sure you are in the **Contacts** section in the main menu and that you are a **Gateway Editor**.

**Required inherited cannot be removed, only overridden. Optional inherited contacts may be removed.**

1. Click **Roles** in the sub-menu.
2. Select the location you would like to edit.

**Remove an overridden contact to default to inherited:**

3. Click the **delete icon (x)** to the right of the role.
4. Click **Yes**. It will default to the inherited contact.

**Remove an optional contact:**

5. Click the **delete icon (x)** to the right of the role.
6. Click **Yes**. It will first remove any local override.
7. Click the **(x)** again to remove the inherited contact.

**Retrieve an inherited optional contact that had been removed:**

8. Click the **edit icon** to the right of the role.
9. Choose **“Use your parent’s assigned contacts for this role.”**
  - This will bring in all of the parent’s assigned contacts if they have multiples.

1

OARnet An OH·TECH Consortium Member Gateway | Contacts oar.net Service Desk My Profile Logout

Client: Test Client All Clients **Contacts** Users Stats

Client SN: TESTTWO Roles Contacts Role Definitions  
 Site: TESTTWO Sit...  
 Site SN: TESTTWO-SITEB  
 Site Address: Please submit your address to the Service Desk

Client Side \*Gray entries indicate inherited contacts from parent entity. May change or add site specific contacts below.

Contact Role	Name	Email	Title	Office	Mobile	
Administrative	Joe Test Smith Test	jsmith@email.org	Test Title	555-555-5555		<input checked="" type="checkbox"/> x
After Hours 1	Jane Doe	jdoe@client.org	Director	555-555-5555		<input type="checkbox"/>

Overrides and additional location-specific contacts appear in black.

2

3

4

Are you sure you want to remove "Joe Test Smith Test - TESTTWO" from the Administrative role?

No Yes

If it is a required role, it will inherit from the parent location and appear in gray.

5

Client Side \*Gray entries indicate inherited contacts from parent entity. May change or add site specific contacts below.

Contact Role	Name	Email	Title	Office	Mobile	
Administrative	Jane Doe	jdoe@client.org	Director	555-555-5555		<input type="checkbox"/>
After Hours 1	Jane Doe	jdoe@client.org	Director	555-555-5555		<input type="checkbox"/>



To follow these instructions make sure you are in the **Contacts** section in the main menu and that you are a **Gateway Editor**.

### Opt-Out of After Hours:

Sites designated as Emergency Services cannot opt-out of After Hours support. Please read the policy carefully before choosing to opt-out. When this option is selected OARnet will discontinue proactive monitoring and troubleshooting for network services at this site outside of Business Hours (8 a.m. - 5 p.m. Monday through Friday). This includes service-affecting issues.

1. Click the **check box** next to "Opt-out of After Hours Support."
2. **Read carefully.**
3. Select **Save**
  - OARnet will now discontinue proactive monitoring and troubleshooting for network services outside of normal business hours 8 a.m. - 5 p.m. Monday through Friday for this site.
4. Repeat for any additional site
5. You may opt back in at any time by selecting the check box.

1

Client: Client Name Contacts Users Stats

Site:  Roles Contacts Role Definitions

Address: 134 Main St. Columbus, OH 43212

Client Required Roles Opt-out of After Hours Support

Contact Role	Name	Email	Title	Office	Mobile	
Administrative	Joe Smith	jsmith@email.org	Engineer	555-555-5555		<input type="checkbox"/>
After Hours 1	Sam Miller	smiller@email.org	Tech	333-333-3333		<input type="checkbox"/>
After Hours 2	Sam Miller	smiller@email.org	Tech	333-333-3333		<input type="checkbox"/>
After Hours 3	Sam Miller	smiller@email.org	Tech	333-333-3333		<input type="checkbox"/>
Billing	Joe Smith	jsmith@email.org	Engineer	555-555-5555		<input type="checkbox"/>

2

**Opt-Out of After Hours Support**

This option is provided to support organizations not staffed after hours or sites with non-critical business services. Available staff are necessary to assist OARnet in problem resolution.

**Warning:** When this option is selected OARnet will discontinue proactive monitoring and troubleshooting for network services at this site outside of Business Hours (8 a.m. - 5 p.m. Monday through Friday). This includes service-affecting issues.

In the event of an incident outside Business Hours, OARnet will notify the site Escalation 1 contact via e-mail and resume normal escalation procedures the following business day. In the event of a service disruption outside Business Hours, your organization will be responsible for initiating contact with OARnet for assistance.

Sites designated as Emergency Services cannot opt-out of After Hours Support. When a site has been opted-out of After Hours Support and becomes designated as an Emergency Services site, the opt-out authorization will be void.

Only Gateway Editors can authorize the opt-out option.

**Any sites for this client that already opted-out** → Current Site(s) Without After Hours Support  
Site Name

**Site Name** →

**Authorize the discontinuation of After Hours Support**

You are authorizing OARnet to discontinue proactive monitoring and troubleshooting for network services outside of 8 a.m. - 5 p.m., Monday thru Friday.

Site  
Site Name

Are you sure you want to opt-out?



To follow these instructions make sure you are in the **Contacts** section in the main menu and that you are a **Gateway Editor**.

**Resume After Hours Support:**

1. Click the **check box** next to "Opt-out of After Hours Support."
2. Select **Save**
  - OARnet will now resume proactive monitoring and troubleshooting for network services outside of normal business hours 8 a.m. - 5 p.m. Monday through Friday for this site.
3. **Assign** contacts to the After Hours 1-3 roles
4. Repeat for any additional site.

1

Notation After Hours Opt Out

Check box

Client: Client Name Contacts Users Stats

Site: Site Name Roles Contacts Role Definitions

Address: 134 Main St. Columbus, OH 43212

Notes: [icon]

Client Required Roles Opt-out of After Hours Support

Contact Role	Name	Email	Title	Office	Mobile	
Administrative	Joe Smith	jsmith@email.org	Engineer	555-555-5555		<input checked="" type="checkbox"/>
Billing	Joe Smith	jsmith@email.org	Engineer	555-555-5555		<input checked="" type="checkbox"/>
Escalation 1	Joe Smith	jsmith@email.org	Engineer	555-555-5555		<input checked="" type="checkbox"/>
Escalation 2	Joe Smith	jsmith@email.org	Engineer	555-555-5555		<input checked="" type="checkbox"/>
Escalation 3	Joe Smith	jsmith@email.org	Engineer	555-555-5555		<input checked="" type="checkbox"/>

2

**Resume After Hours Support**

OARnet will resume proactive monitoring and troubleshooting for network services outside of 8 a.m. - 5 p.m., Monday thru Friday.

site name → Sites Site Name

**Resume After Hours Support?**

Cancel Yes

3

Assign After Hours Contacts

Client: Client Name Contacts Users Stats

Site: Site Name Roles Contacts Role Definitions

Address: 134 Main St. Columbus, OH 43212

Client Required Roles Opt-out of After Hours Support

Contact Role	Name	Email	Title	Office	Mobile	
Administrative	Joe Smith	jsmith@email.org	Engineer	555-555-5555		<input checked="" type="checkbox"/>
After Hours 1						<input checked="" type="checkbox"/>
After Hours 2						<input checked="" type="checkbox"/>
After Hours 3						<input checked="" type="checkbox"/>
Billing	Joe Smith	jsmith@email.org	Engineer	555-555-5555		<input checked="" type="checkbox"/>
Escalation 1	Joe Smith	jsmith@email.org	Engineer	555-555-5555		<input checked="" type="checkbox"/>