



OARnet

Gateway Guide

Contact Management

You must be a Gateway Editor
to use this guide

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Need help?

Contact support@oar.net or
1-800-627-6420

Other Gateway Guides

Access
(registration & contact edit access)

Stats
(for OARnet bandwidth subscribers)

06/24/2016

Definitions

Contacts

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

People who have been authorized and registered with a user name and password to view the Gateway resources.

Gateway Editors

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 registered and been authorized 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**.

Account Profile and Contact

You may have registered using a different email than the one applied to your contact email. You can update your Account Profile email to match your Contact email. It will **not** change your login username.

Note Flags

A note flag is a visual indication for important information.

Navigation & General Highlights



Organization Name / Roles / Site Name

Breadcrumb menu

Client Organization Name

Parent Parent Organization Name

Site Site Name

(Primary Site)

Address Street City, State Zip

Inherit Yes – One or more contacts are inherited at this site.

Notes

This will appear when a "note" is applied to the organization or site. See Flag indications on page 13.

This will appear if you have a parent site or parent organization.

Indicates your primary Gateway site. Child sites inherit Contacts from here. Child organization's primary site inherit contacts from here.

This will appear if the site inherits contacts from a parent site

Main Menu

Roll over arrows for additional options

Roles

Contacts

Users

Stats

Service Center

Support

Account

View & manage Contact Role Assignments.

View & manage who at your organization has Gateway view & edit access

Users in Contact Roles can reach Service Center (Ticketing System)

Help, Contact OARnet, Resources & more

Your personal user Information & Logout

View & manage people to be applied to roles & their personal information (name, phone numbers, etc...).

View your direct internet access statistics*

Opt-out of After Hours Support

Editors can opt out of after hours support**

Client Side - Required Roles

Contact Role	Name	Email	Title	Office	Mobile	Actions
Administrative	Julie Frame	julie@garden.org	Network Engineer	(614) 555-5555 x345	(614) 552-5555	
	Sam Sunny	sunny@email.org	Happy Camper	(614) 555-5555		
After Hours 1	Lewis Notebook	lewis@garden.org	Support Center Tech	(614) 333-5555		
After Hours 2	Jane Clearly	clearly@clover.org	Title	(614) 555-5545		
After Hours 3	Sam Sunny	sunny@email.org	Happy Camper	(614) 555-5555		
Billing	Julie Frame	julie@garden.org	Network Engineer	(614) 555-5555 x345	(614) 552-5555	
Escalation 1	Lewis Notebook	lewis@garden.org	Support Center Tech	(614) 333-5555		
Escalation 2	Sam Sunny	sunny@email.org	Happy Camper	(614) 555-5555		
Escalation 3	Lewis Notebook	lewis@garden.org	Support Center Tech	(614) 333-5555		
Executive	Lewis Notebook	lewis@garden.org	Support Center Tech	(614) 333-5555		
Last Resort	Jane Clearly	clearly@clover.org	Title	(614) 555-5545		
Maintenance	Sam Sunny	sunny@email.org	Happy Camper	(614) 555-5555		
Security Operations	Jane Clearly	clearly@clover.org	Title	(614) 555-5545		

Apply contacts to roles using the Swap, +Add Contact, and fill role Button

Remove contacts from roles using the remove (–) button. Required roles can only be replaced.

*Available only to clients with OARnet direct internet access subscription
**Emergency Services sites cannot opt-out of After Hours Support

Assign a Contact to a Role (or replace)

To follow these instructions you must be a **Gateway Editor**.

1. Click **Roles** in the main menu.
2. Click the **Fill Role Icon** to the right of the role.
 - a. To replace a contact, click the **Swap button**.
 - b. To add an additional contact, click the **+ Add Contact button**.
3. Choose the contact you want to assign to role.
 - a. If the contact does not exist, click **Create New Contact**.
 - b. Fill in the form, click **Save**.
4. Click **Save**.

The screenshot shows the Gateway Roles page. The main menu at the top includes Roles, Contacts, Users, Stats, Service Center, Support, and Account. The breadcrumb trail is Organization Name / Roles / Site Name. The page displays client information and a table of roles. Annotations include: 1. A box around the Roles menu item. 2. A box around the 'Fill Role' button in the 'After Hours 2' row. 3. A box around the 'Swap' button in the 'Administrative' row. 4. A box around the 'Create New Contact' button in the 'Administrative' row. 5. A box around the 'Save' button in the 'Administrative' row. 6. A box around the 'Fill Role' button in the 'After Hours 2' row. 7. A box around the 'Fill Role' button in the 'After Hours 3' row. 8. A box around the 'Fill Role' button in the 'Billing' row. 9. A box around the 'Fill Role' button in the 'Escalation 1' row. 10. A box around the 'Fill Role' button in the 'Escalation 2' row. 11. A box around the 'Fill Role' button in the 'Escalation 3' row. 12. A box around the 'Fill Role' button in the 'Executive' row. 13. A box around the 'Fill Role' button in the 'Last Resort' row.

Contact Role	Name	Email	Title	Office	Mobile	Actions
Administrative	Julie Frame	julie@garden.org	Network Engineer	(614) 555-5555 x345	(614) 552-5555	+ Add Contact
After Hours 1	Lewis Notebook	lewis@garden.org	Support Center Tech	(614) 333-5555		+ Add Contact
After Hours 2						Fill Role
After Hours 3						Fill Role
Billing						Fill Role
Escalation 1						Fill Role
Escalation 2						Fill Role
Escalation 3						Fill Role
Executive						Fill Role
Last Resort						Fill Role

The screenshot shows the 'Edit Role' dialog box. It has a title 'Administrative Role' and a subtitle 'Select the contact below to assign a different contact to this role.' There are two buttons: 'Assign Contact' and 'Create New Contact'. Annotations include: 3. A box around the 'Assign Contact' button. 3a. A box around the 'Create New Contact' button. There are also 'Cancel' and 'Save' buttons at the bottom.

The screenshot shows the 'Create New Contact' form. It has a title 'Create New Contact' and a subtitle 'At least one phone number is required.' There are input fields for First Name, Last Name, Title, Email, Office Phone, Office Phone Ext, and Mobile Phone. There are 'Cancel' and 'Save' buttons at the bottom. Annotation 3b points to the 'Email' field.

Add a new contact

To follow these instructions you must be a **Gateway Editor**.

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

1. Click **Contacts** in the main menu.
2. Click **Create New 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....)

The screenshot shows the Gateway interface with the 'Contacts' menu item highlighted. A callout box with the number '1' points to the 'Contacts' menu. Below the menu, there is a table of 'Client Contacts'. A callout box with the number '2' points to the 'Create New Contact' link at the bottom of the table. Another callout box with the number '3' points to the 'Edit Contact / Lewis Notebook' form. A third callout box with the text 'This will tell you if a contact is also a user' points to the 'Invite' link in the table.

Gateway

Roles **Contacts** Users Stats Service Center Support Account

Organization Name / Roles / Site Name

Client Organization Name

Client Contacts ?

First	Last	Title	Email	Office	Mobile	User ?	Edit ?
Julie	Frame	Network Engineer	julie@garden.org	(614) 555-5555 x345	(614) 552-5555	Invite	✎ ✕

Create New Contact

Edit Contact / Lewis Notebook

At least one phone number is required.

Lewis
* First Name

Notebook
* Last Name

Support Center Tech
* Title

lewis@garden.org
* Email

+16143335555
Office Phone

Office Phone Ext

Mobile Phone

Cancel Save

Edit a Contact's Personal Information

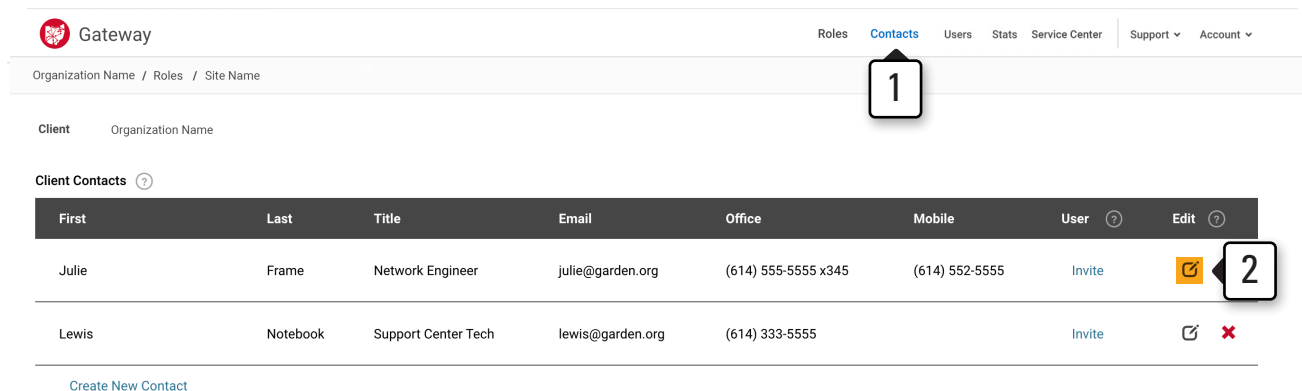
To follow these instructions you must be a **Gateway Editor**.

NOTE These changes will reflect anywhere a contact's information appears (in any Role).

1. Click **Contacts** in the main 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.

Contacts must be applied to roles and have a user account to reach Service Center





Gateway

Roles **Contacts** Users Stats Service Center Support Account

Organization Name / Roles / Site Name

Client Organization Name

Client Contacts ?

First	Last	Title	Email	Office	Mobile	User ?	Edit ?
Julie	Frame	Network Engineer	julie@garden.org	(614) 555-5555 x345	(614) 552-5555	Invite	
Lewis	Notebook	Support Center Tech	lewis@garden.org	(614) 333-5555		Invite	

[Create New Contact](#)

Edit Contact / Julie Frame

3

At least one phone number is required.

Julie

* First Name

Frame

* Last Name

Network Engineer

* Title

julie@garden.org

* Email

+16145555555

Office Phone

345

Office Phone Ext

+16145525555

Mobile Phone

Cancel Save

Remove a Contact



To follow these instructions you must be a **Gateway Editor**.

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

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

NOTE 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.

The screenshot shows the Gateway interface. At the top, the 'Contacts' menu item is highlighted with a callout '1'. Below the header, there's a breadcrumb 'Organization Name / Roles / Site Name'. The main content area is titled 'Client Contacts' and contains a table with columns: First, Last, Title, Email, Office, Mobile, User, and Edit. The table lists two contacts: Julie Frame (Network Engineer) and Lewis Notebook (Support Center Tech). The 'Edit' column for Julie Frame has a callout '2' pointing to a red 'x' delete icon. Below the table is a link 'Create New Contact'. A confirmation dialog titled 'Delete Contact / Julie Frame' is shown with the message 'Are you sure you want to delete this contact? Doing so will not affect this user's account or access.' and buttons for 'No' and 'Yes'. A callout '3' points to the 'Yes' button.

First	Last	Title	Email	Office	Mobile	User	Edit
Julie	Frame	Network Engineer	julie@garden.org	(614) 555-5555 x345	(614) 552-5555	Invite	
Lewis	Notebook	Support Center Tech	lewis@garden.org	(614) 333-5555		Invite	

Create New Contact

Delete Contact / Julie Frame

Are you sure you want to delete this contact? Doing so will not affect this user's account or access.

No Yes

Remove an optional role or additional contact role

To follow these instructions you must be a **Gateway Editor**.

If you have multiple contacts assigned to 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 remove one of them.

If you need to change the contact in the role, you can use the **Swap button** to reassign the contact.

Contacts in Optional Roles can always be removed.

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

NOTE Per the OARnet Contact Policy at least one contact must be applied to every required role.

Contacts in optional roles can be removed any time.

Please be sure to go to the Contacts and Users pages to full remove individuals from the system.

Gateway

Organization Name / Roles / Site Name

Client: Organization Name
Parent: Parent Organization Name
Site: Site Name (Primary Site)
Address: Street City, State Zip
Notes: [Icons]

Client Side - Required Roles [?] Opt-out of After Hours Support [?] []

Contact Role	Name	Email	Title	Office	Mobile	Actions
Administrative [?]	Julie Frame	julie@garden.org	Network Engineer	(614) 555-5555 x345	(614) 552-5555	[Swap] [Add Contact]
	Sam Sunny	sunny@email.org	Happy Camper	(614) 555-5555		[Swap] [Delete] [Add Contact]
After Hours 1 [?]	Lewis Notebook	lewis@garden.org	Support Center Tech	(614) 333-5555		[Swap] [Add Contact]

Remove Role

Administrative Role

Are you sure you want to remove **Sam Sunny** from this role?

[No] [Yes]

Override an Inherited Contact

To follow these instructions you must be a **Gateway Editor**.

By default, sites inherit contacts from the primary parent site, **these appear in gray with a people icon next to the inherited contacts name**. Gateway Editors can override and/or add more roles on a site level.

1. Click **Roles** in the main menu.
2. Select the site you would like to edit.
3. Click the **+ Add Contact** button to the right of the role.
4. Choose the contact you want to assign to role.
 - a. If the contact does not exist, click **Create New Contact**.
 - b. Fill in the form, click **Save**.
5. Click the **Remove contact (-)** button to remove the inherited contact set.
6. Click **Save**.

If parent allows child overrides, optional parent roles may always be removed.

The screenshot shows the Gateway interface. At the top, the 'Roles' menu item is highlighted with a callout '1'. Below the navigation bar, the 'Client' section shows 'Organization Name' and 'Parent Organization Name'. The 'Site' dropdown is set to 'Site Name' with a callout '2'. The 'Address' field is 'Street City, State Zip'. The 'Inherit' status is 'Yes - One or more contacts are inherited at this site.' with a callout '3' pointing to a text box that says 'This will let you know if this site is inheriting contacts.' Below this, the 'Client Side - Required Roles' table is shown. The table has columns: Contact Role, Name, Email, Title, Office, Mobile, and Actions. The 'Administrative' role is selected, and the 'After Hours 1' role is also shown. The 'Actions' column for each role has a '+ Add Contact' button. A callout '3' points to the '+ Add Contact' button for the 'Administrative' role.

The screenshot shows the 'Edit Role' dialog box. It has a title 'Administrative Role' and a subtitle 'Select the contact below to assign a different contact to this role.' Below the subtitle is a dropdown menu labeled 'Assign Contact'. A callout '4' points to the dropdown menu. Below the dropdown menu is a 'Create New Contact' link. A callout '4a' points to the 'Create New Contact' link. At the bottom of the dialog are 'Cancel' and 'Save' buttons.

The screenshot shows the 'Create New Contact' form. It has a title 'Create New Contact' and a subtitle 'At least one phone number is required.' Below the subtitle are input fields for 'First Name', 'Last Name', 'Title', 'Email', 'Office Phone', 'Office Phone Ext', and 'Mobile Phone'. A callout '4b' points to the 'First Name' input field. At the bottom of the form are 'Cancel' and 'Save' buttons.

Return to inherited contacts (remove an override)

To follow these instructions you must be a **Gateway Editor**.

1. Click **Roles** in the main menu.
2. Click one of the apply contact buttons:
 - a. **Swap icon button.**
 - b. **+ Add Contact button.**
 - c. **Fill Role button**
3. 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 for that specific role.
4. Click **Save**.

Gateway

Roles Contacts Users Stats Service Center Support Account

Organization Name / Roles / Site Name

Client Organization Name

Parent Parent Organization Name

Site Site Name (Primary Site)

Address Street City, State Zip

Notes

Client Side - Required Roles

Opt-out of After Hours Support

Contact Role	Name	Email	Title	Office	Mobile	Actions
Administrative	Julie Frame	julie@garden.org	Network Engineer	(614) 555-5555 x345	(614) 552-5555	+ Add Contact
After Hours 1	Lewis Notebookbook	lewis@garden.org	Support Center Tech	(614) 333-5555		+ Add Contact

Edit Role

Administrative Role

Select the contact below to assign a different contact to this role.

Assign Contact

Inherit from Garden Inc

Use your parent's assigned contacts for this role.

Garden Inc

Julie Frame - julie@garden.org

Lewis Notebookbook - lewis@garden.org

GARDEN Athens County

Jane Clearly - clearly@clover.org

Sam Sunny - sunny@email.org

Opt-Out of After Hours:

To follow these instructions you must be a **Gateway Editor**.

NOTE: Sites designated as Emergency Services cannot opt-out of After Hours support. Please read the policy carefully before choosing to opt-out.

1. Click on **Roles** in the Main Menu
2. Select the relevant site. This option must be done on the site level.
3. Click the **check box** next to “Opt-out of After Hours Support.”
4. Read carefully.
5. Select **Save**.
6. Repeat for any additional site

You may opt back in at any time by clicking on the checkbox, and then select Opt-In - see page 12.

The screenshot shows the 'Gateway' interface. At the top, there's a navigation bar with 'Roles' highlighted. Below it, a breadcrumb trail shows 'Organization Name / Roles / Site Name'. The main form area has fields for 'Client' (Organization Name), 'Parent' (Parent Organization Name), 'Site' (a dropdown menu with '(Primary Site)' next to it), and 'Address' (Street City, State Zip). Below these fields are three status icons: a green circle with a checkmark, a green circle with a checkmark, and a yellow circle with a checkmark and a diagonal line through it. A callout box points to the third icon, stating 'This will appear after the site has been opted out.' To the right of the form, there's a button labeled 'Opt-out of After Hours Support' with a callout box pointing to it, labeled '3'. Below the form, there's a table titled 'Client Side - Required Roles'. The table has columns: Contact Role, Name, Email, Title, Office, Mobile, and Actions. There are two sections: 'Administrative' and 'After Hours 1'. The 'Administrative' section has two rows: one for Julie Frame (Network Engineer) and one for Sam Sunny (Happy Camper). The 'After Hours 1' section has one row for Lewis Notebook (Support Center Tech). Each row has an 'Add Contact' button. A callout box labeled '1' points to the 'Roles' menu item, and a callout box labeled '2' points to the 'Site' dropdown menu.

The screenshot shows a dialog box titled 'Opt-Out of After Hours Support'. It contains a warning message: '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.' Below this, it explains that 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. It also states that if there is a service disruption outside Business Hours, the organization will be responsible for initiating contact with OARnet for assistance. A note at the bottom states: '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.' A footnote at the bottom says: '* Only Gateway Editors can authorize the opt-out option.'

Current Site(s) Without After Hours Support

Name of Site

This will list sites opted-out. Users can see this page, only Gateway Editors can make changes.

The screenshot shows a confirmation dialog box titled 'Authorize the discontinuation of After Hours Support'. It contains the text: 'You are authorizing OARnet to discontinue proactive monitoring and troubleshooting for network services outside of 8 a.m. - 5 p.m., Monday through Friday.' Below this, it asks: 'Are you sure you want to opt-out?' There are two buttons: 'Cancel' and 'Yes'.

Resume After Hours Support:

To follow these instructions you must be a **Gateway Editor**.

NOTE: You must assign After Hours 1-3 for After Hours Support.

1. Click on Roles in the Main Menu
2. Select the relevant site. This option must be done on the site level.
3. Click the **check box** next to “Opt-out of After Hours Support.”
4. **Read** the disclaimer.
5. Select **Save**.
6. **Assign** contacts to the After Hours 1-3 roles
7. Repeat for any additional site.

The screenshot shows the 'Gateway' interface. At the top, the 'Roles' menu item is highlighted with a callout '1'. Below the navigation bar, the 'Client' section shows 'Organization Name' and 'Parent Organization Name'. The 'Site' dropdown is set to 'Site Name' with a callout '2'. The 'Address' field is 'Street City, State Zip'. The 'Notes' section has three icons: a green checkmark, a green checkmark, and a red 'X' icon with a callout '3' pointing to it. A tooltip says 'This will appear after the site has been opted out.' Below this is the 'Client Side - Required Roles' table. The table has columns: Contact Role, Name, Email, Title, Office, Mobile, and Actions. The 'Administrative' role is listed with two contacts: Julie Frame and Sam Sunny. Below the table, there are three rows for 'After Hours 1', 'After Hours 2', and 'After Hours 3', each with a red 'Fill Role' button. A callout '6' points to the 'Fill Role' button for 'After Hours 1'. At the top right, there is a checkbox labeled 'Opt-out of After Hours Support' which is checked, with a callout '3' pointing to it.

The first screenshot (callout '4') shows a modal titled 'Current Site(s) Without After Hours Support' with 'None' listed. Below it is a form titled 'Authorize the discontinuation of After Hours Support' with a text area, a 'Site Name of Site' field, and a 'Are you sure you want to opt-out?' question. A tooltip says 'This will list sites opted-out. Users can see this page, only Gateway Editors can make changes.' The second screenshot (callout '5') shows a modal titled 'Resume After Hours Support' with a text area, a 'Site Name of Site' field, and a 'Resume After Hours Support?' question.

Note Flag Icon Indications

Note flags are visual representations to provide users and OARnet staff with pertinent information.

Gateway

RolesContactsUsersStatsSupportAccount

Organization Name / Roles / Site Name

Client

Organization Name

Parent

Parent Organization Name

Site

Site Name (Primary Site)

Address

Street City, State Zip

Inherit

Notes

Notes will appear here
A Green Person in a Circle and A Green Check Mark in a Circle indicate you can access Service Center

Users in a Contact Role

These appear on the Roles and User page to indicate who is a User applied to a Role.

These are auto-set by matching on Contact Email and Account Profile Email being applied to a Role.



Users with a **green circle** designation are currently assigned to at least one contact role for this client.



Users with an **orange triangle** designation are not assigned to any contact role for this client.

Complete / Incomplete Contacts

Contacts are considered complete when all required roles must have a Contact applied and all Contacts must have a first name, last name, title, email and at least one phone number.

These are auto-set based on if contacts are complete or not.



A **green** check means your Organization has complete contacts.



A **red x** means there is missing contact information.

Emergency Services

These are set by OARnet to indicate Organizations and Sites that use OARnet networking services to support Emergency Services such as NG911.



This Organization provides Emergency Services

and



This specific service site provides Emergency Services

Opt-out of After Hours Support

Non-emergency sites can opt-out of After Hours Support. Only Gateway Editors can make this change.



If the site has been opted out, it will show this symbol on the Roles page.