Gateway Guide

Contact Management

You must be a Gateway Editor
to use this guide

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

06/24/2019

Other Gateway Guides

Access
(registration & contact edit access)

Stats
(for OARnet bandwidth subscribers)

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

Main Menu

Roll over arrows for additional options

Gateway

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

Organization Name / Roles / Site Name

Breadcrumb menu

View & manage Contact Role Assignments.

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

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

View your direct internet access statistics*

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

Help, Contact OARnet, Resources & more

Your personal user Information & Logout

Client Organization Name

Parent Parent Organization Name

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

Site Site Name (Primary Site)

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

Address Street City, State Zip

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

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

Notes

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

Client Side - Required Roles

Opt-out of After Hours Support

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

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

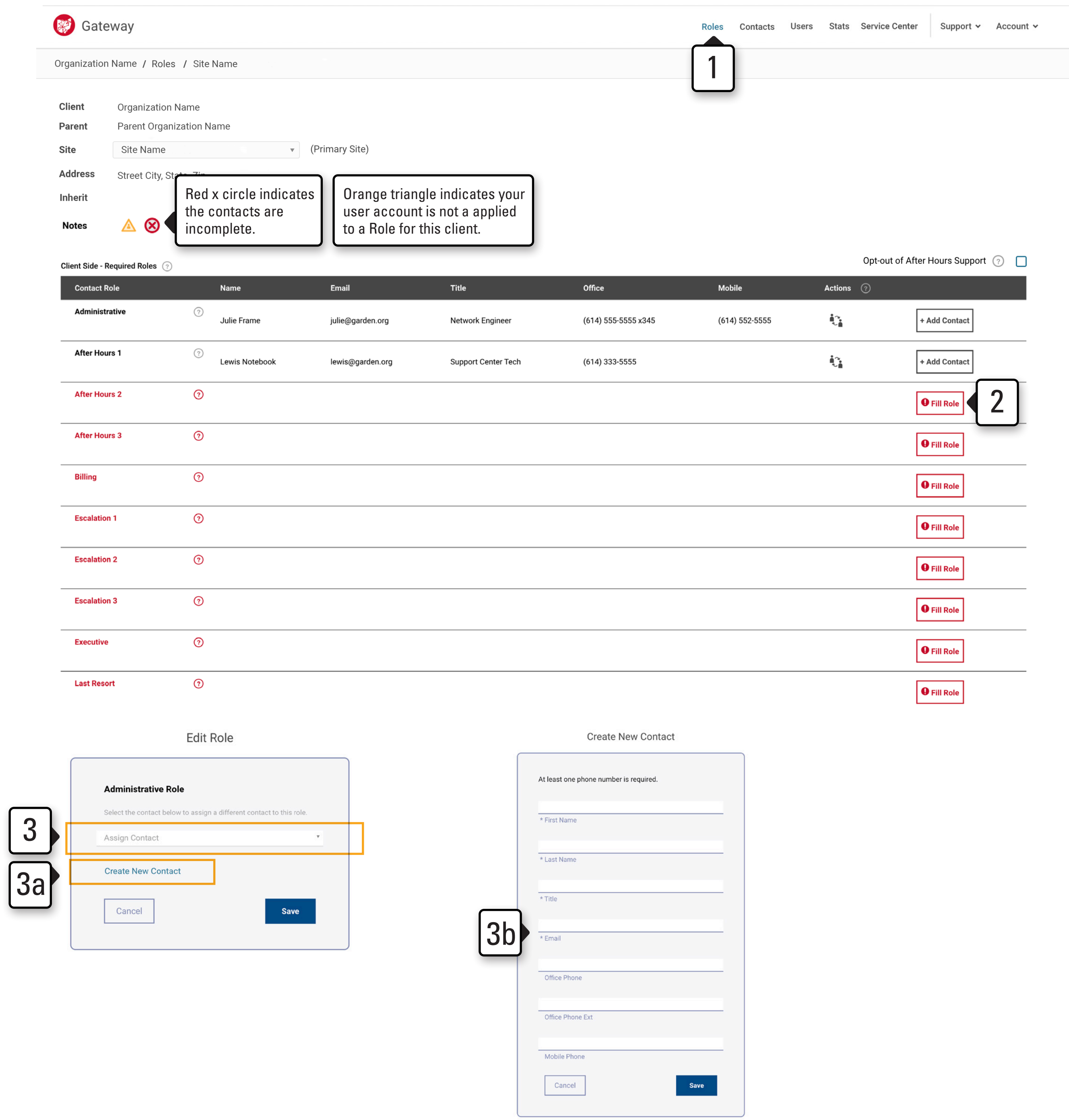
Remove contacts from roles using the remove (–) button. Required roles can only be replaced.

*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.**



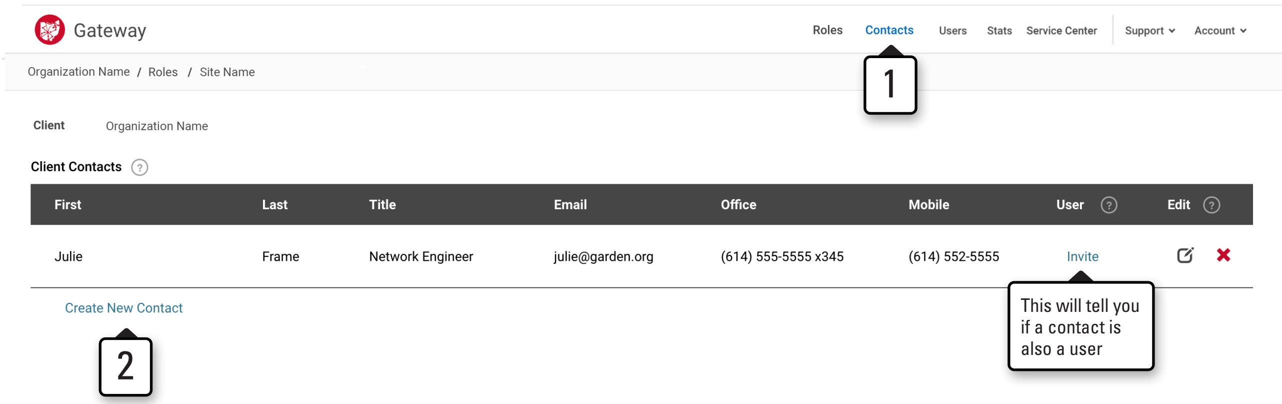
Add a new contact

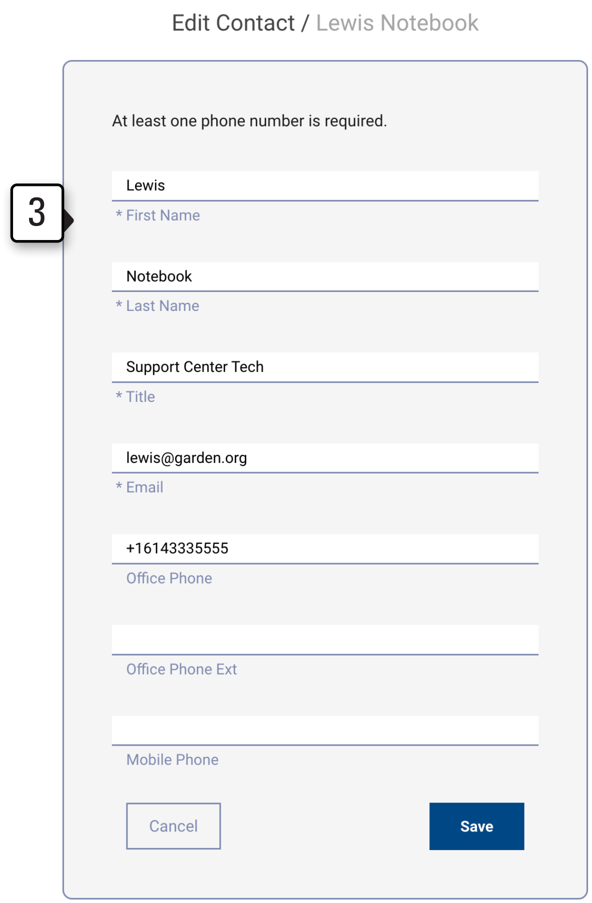
To follow these instructions you must be a **Gateway Editor**.

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....)





Edit a Contact’s Personal Information

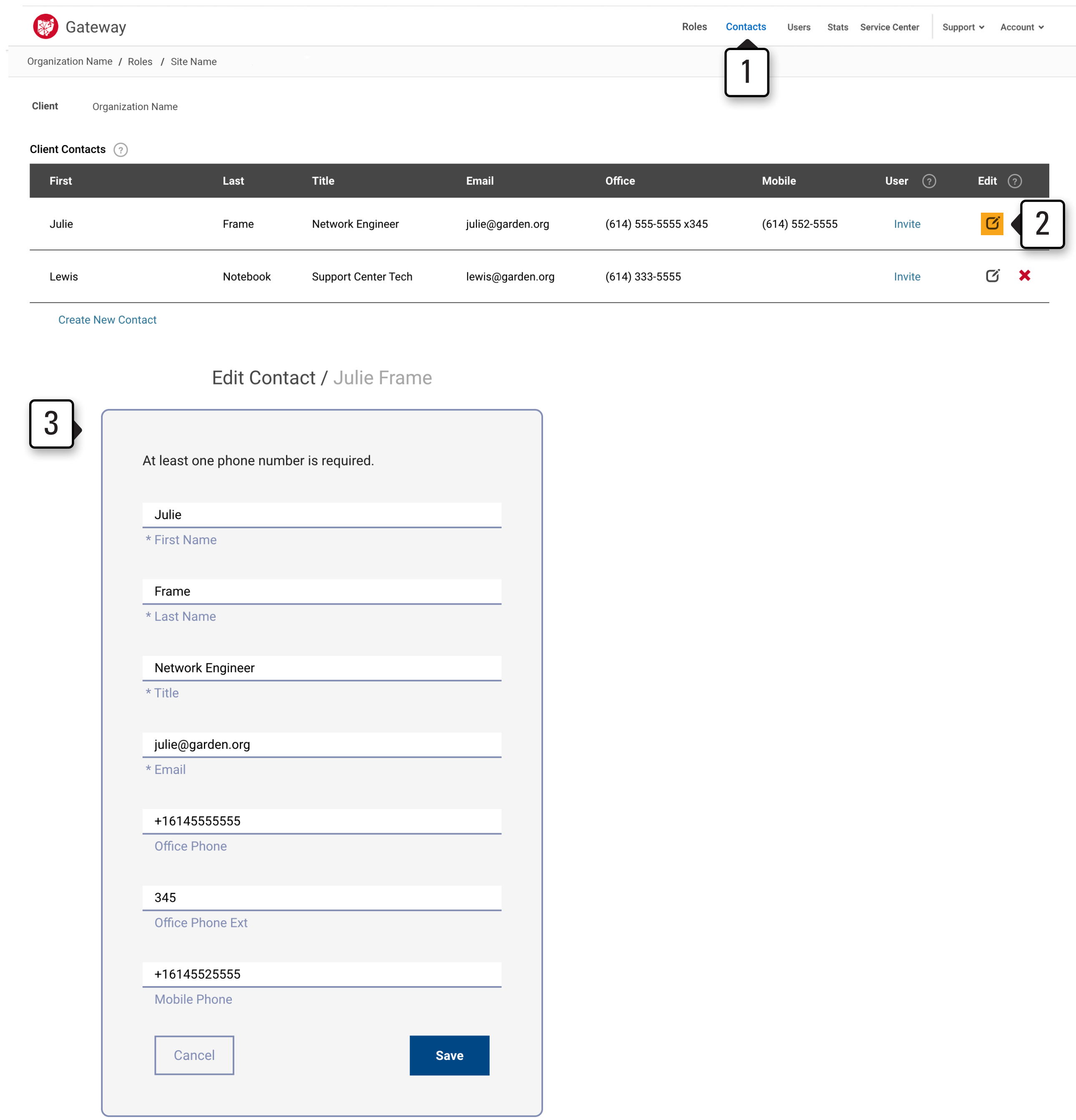
To follow these instructions you must be a **Gateway Editor**.

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



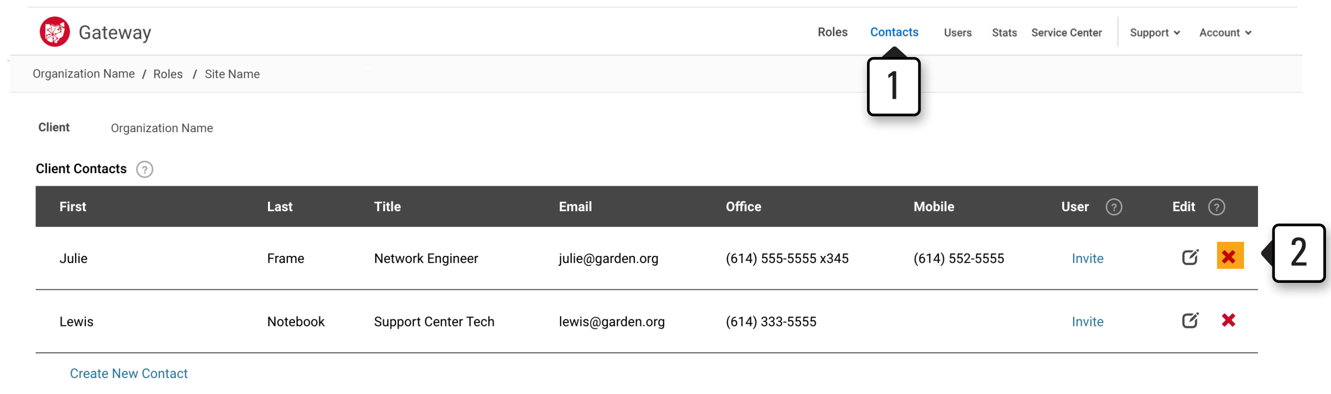
Remove a Contact

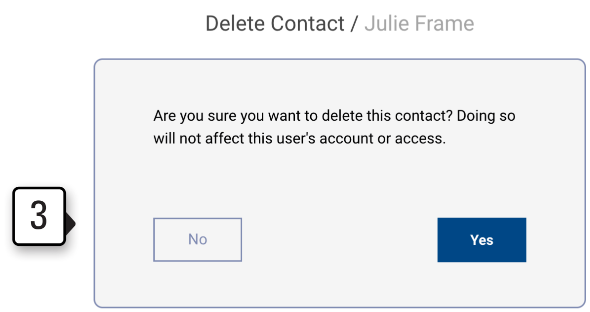
To follow these instructions you must be a **Gateway Editor**.

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.





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.

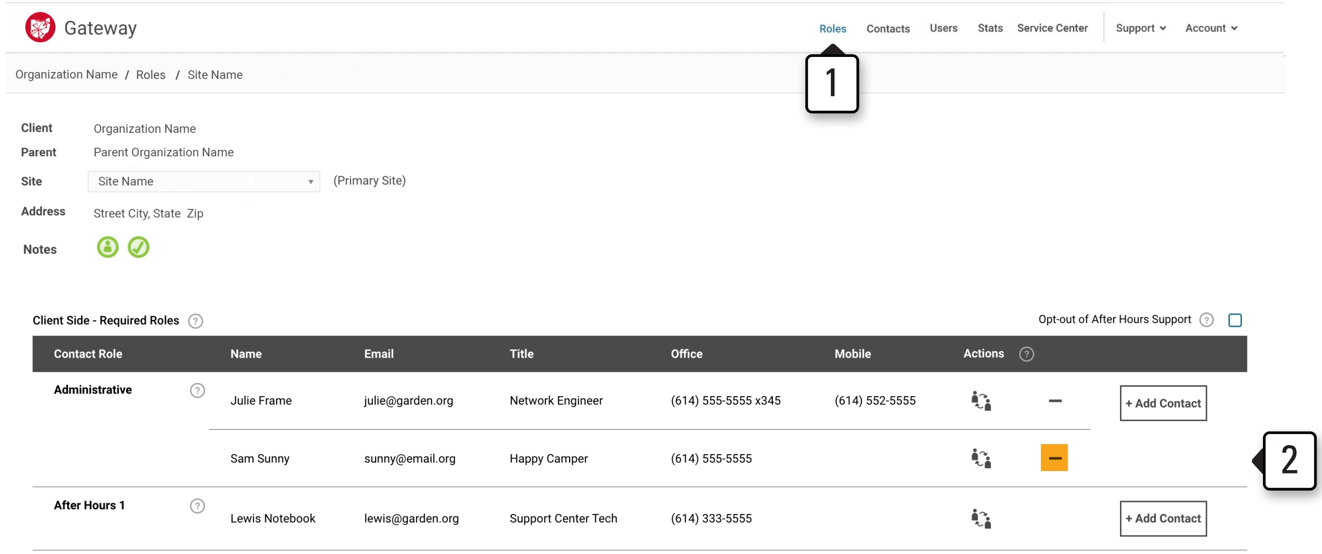
Contacts in Optional Roles can always be removed.

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

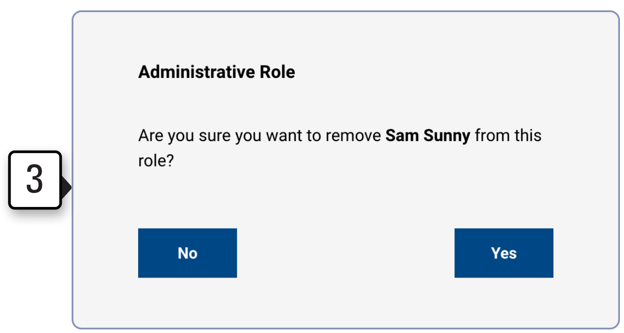
NOTE Per the OARnet Contact Policy at least one contact must be applied to every required role.

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.



Remove Role



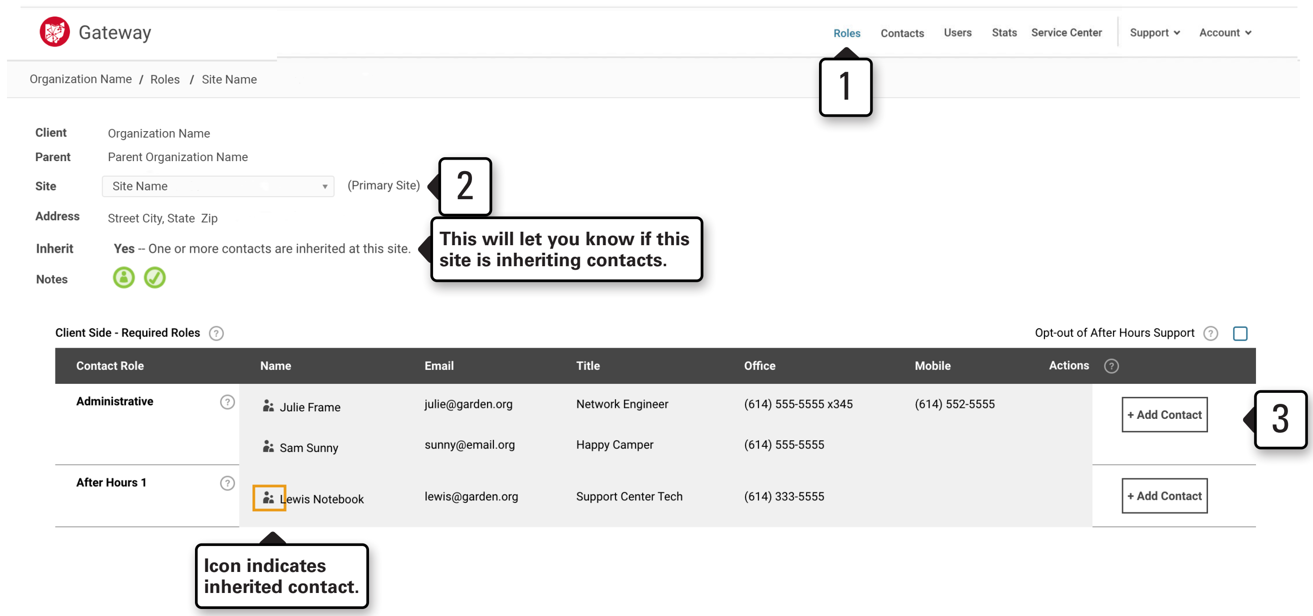
Override an Inherited Contact

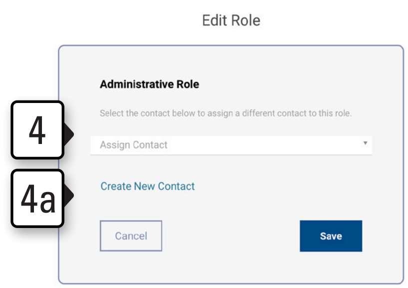
To follow these instructions you must be a **Gateway Editor**.

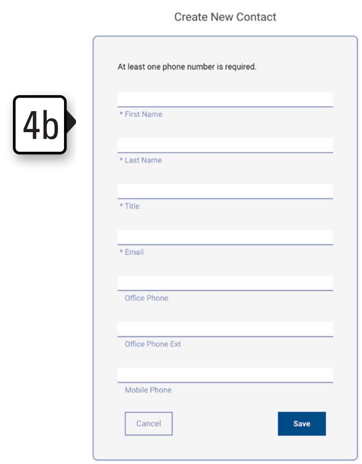
By default, sites inherit contacts from the primary parent site, **these appear in gray with a people icon next to the inherited contacts name**. Gateway Editors can overide and/or add more roles on a site level.

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.



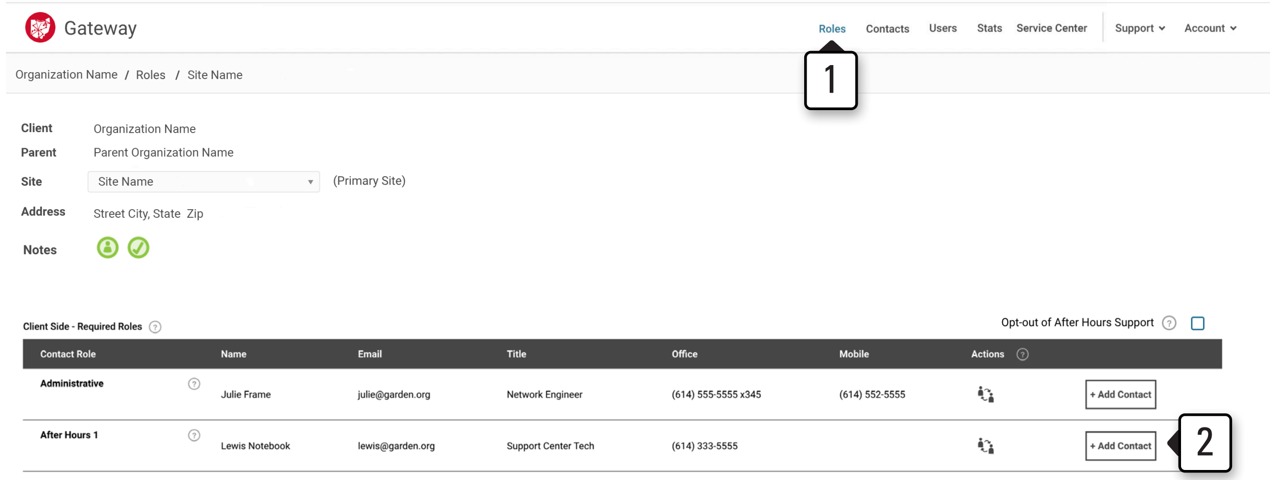




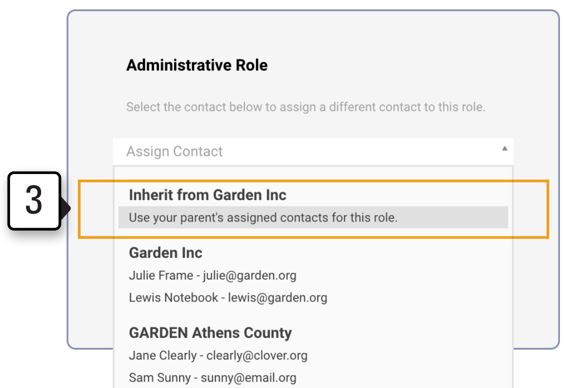
Return to inherited contacts (remove an override)

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.**



Edit Role



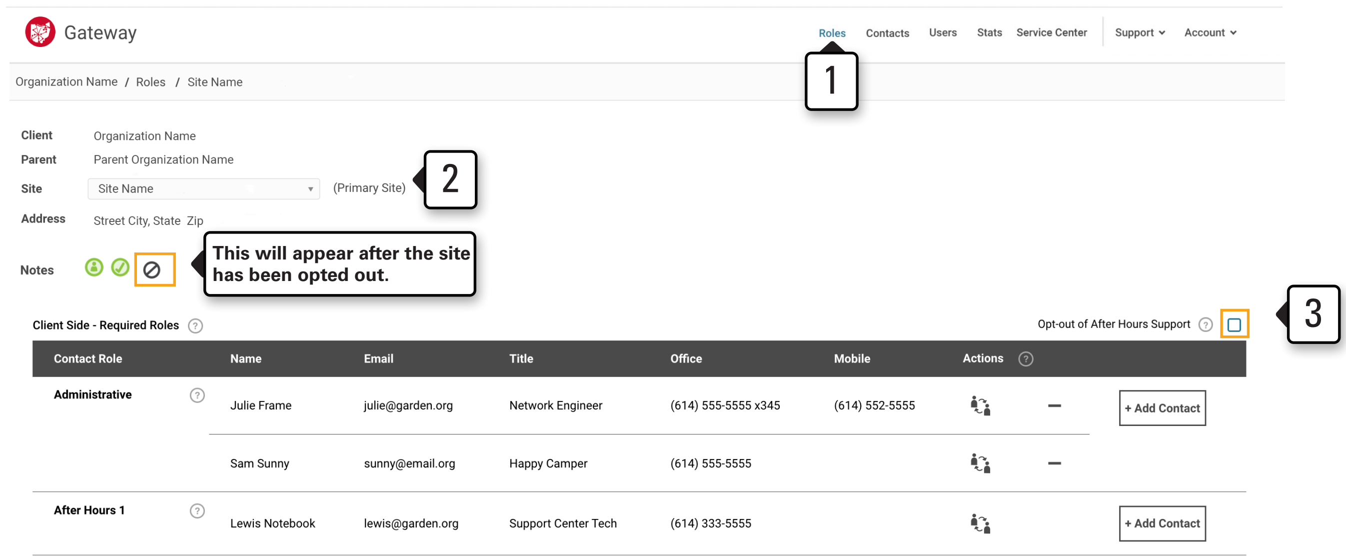
Opt-Out of After Hours:

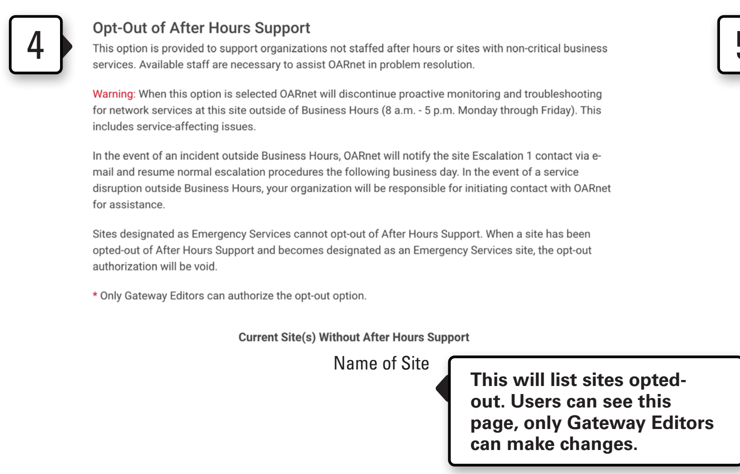
To follow these instructions you must be a **Gateway Editor**.

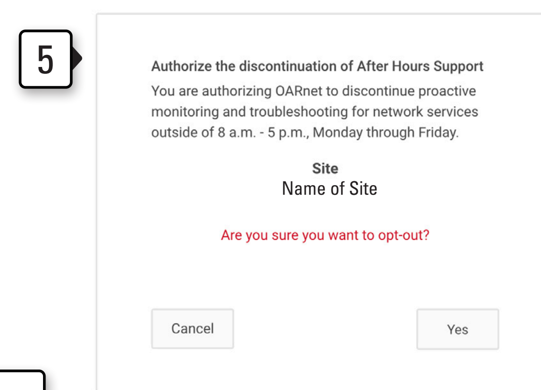
NOTE: Sites designated as Emergency Services cannot opt-out of After Hours support. Please read the policy carefully before choosing to opt-out.

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.





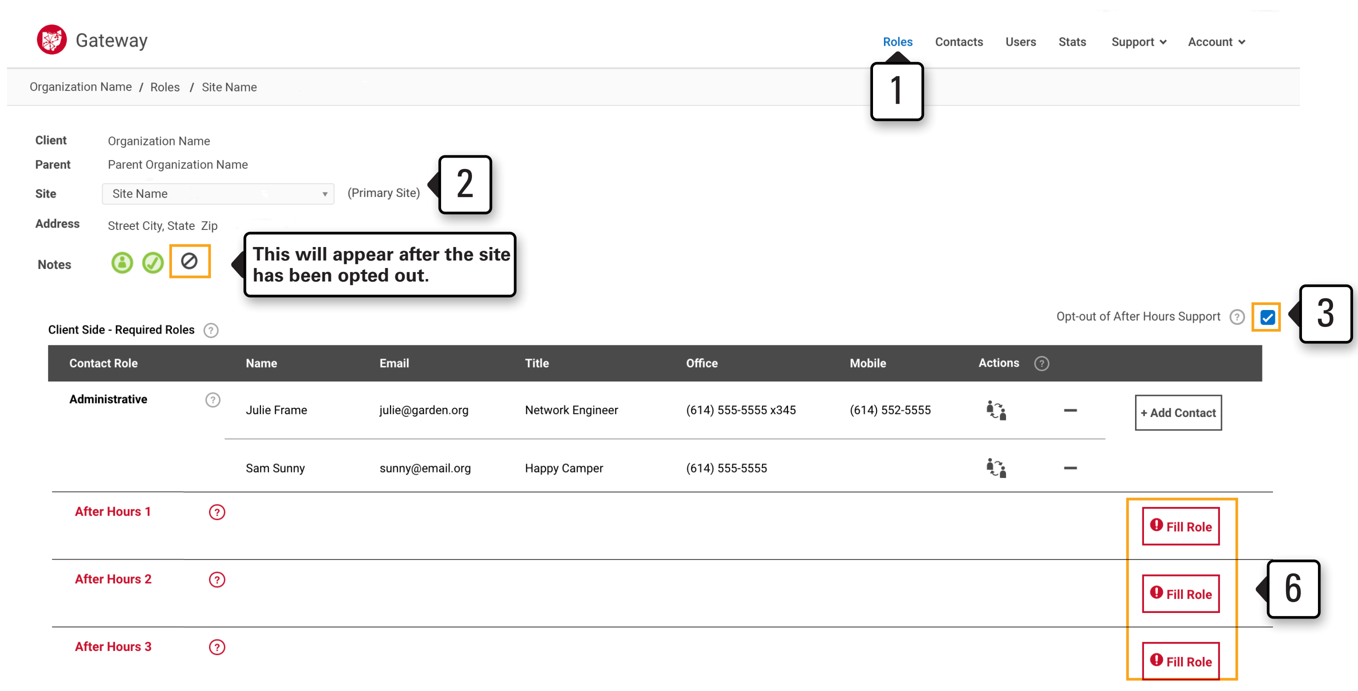


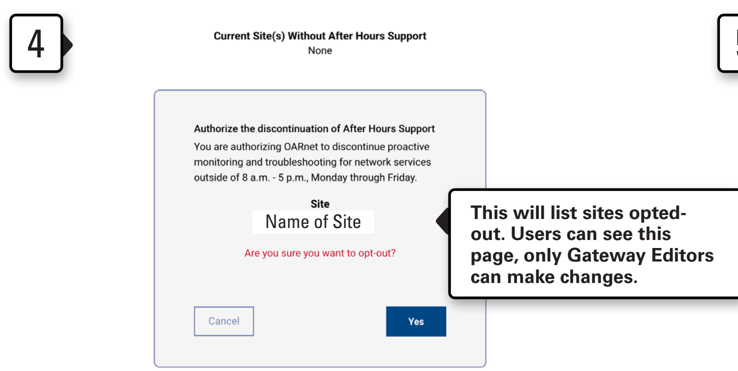
Resume After Hours Support:

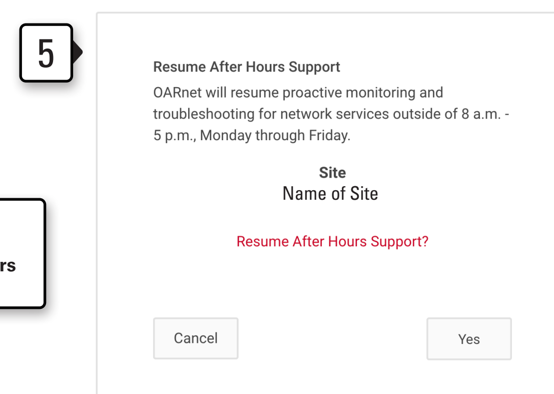
To follow these instructions you must be a **Gateway Editor**.

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.

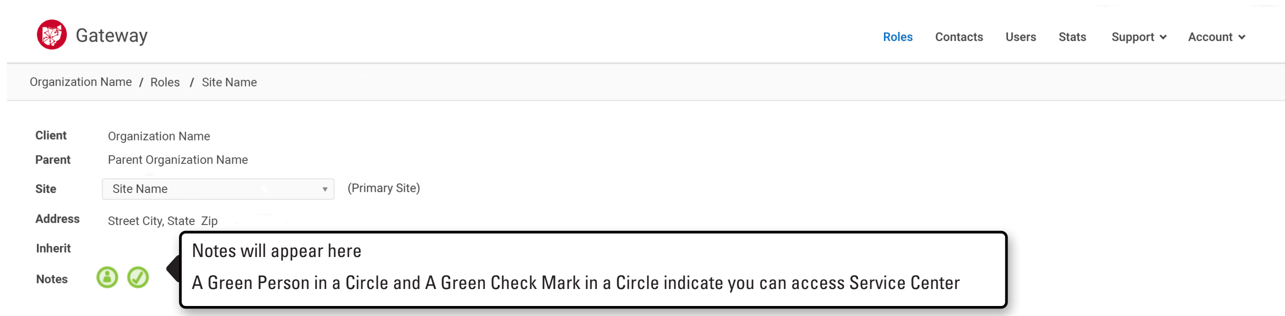






Note Flag Icon Indications

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



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.