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)
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.

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).

Note Flags
A note flag is a visual indication for important
### Navigation & General Highlights

**Contact Role Assignments**

<table>
<thead>
<tr>
<th>Contact Role</th>
<th>Name</th>
<th>Email</th>
<th>Title</th>
<th>Office</th>
<th>Mobile</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative</td>
<td>Jane Smith</td>
<td><a href="mailto:jsmith@org.com">jsmith@org.com</a></td>
<td>Chief Information Officer</td>
<td>222-222-2222</td>
<td>222-555-2121</td>
<td>✔</td>
</tr>
<tr>
<td>After Hours 1</td>
<td>Organization Support Center</td>
<td><a href="mailto:support@org.com">support@org.com</a></td>
<td>Organization 24hr Support Center</td>
<td>222-222-3333</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>After Hours 2</td>
<td>Organization Support Center</td>
<td><a href="mailto:support@org.com">support@org.com</a></td>
<td>Organization 24hr Support Center</td>
<td>222-222-3333</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>After Hours 3</td>
<td>Sam Cloud</td>
<td><a href="mailto:scloud@org.com">scloud@org.com</a></td>
<td>Senior Engineer</td>
<td>222-222-5555</td>
<td>222-555-4141</td>
<td>✔</td>
</tr>
<tr>
<td>Billing</td>
<td>Emily March</td>
<td><a href="mailto:emarch@org.com">emarch@org.com</a></td>
<td>Lead Accountant</td>
<td>222-222-6666</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Escalation 1</td>
<td>Organization Support Center</td>
<td><a href="mailto:support@org.com">support@org.com</a></td>
<td>Organization 24hr Support Center</td>
<td>222-222-3333</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Escalation 2</td>
<td>Joe Evans</td>
<td><a href="mailto:jevans@org.com">jevans@org.com</a></td>
<td>Engineer</td>
<td>222-222-4444</td>
<td>222-555-3131</td>
<td>✔</td>
</tr>
<tr>
<td>Escalation 3</td>
<td>Sam Cloud</td>
<td><a href="mailto:scloud@org.com">scloud@org.com</a></td>
<td>Senior Engineer</td>
<td>222-222-5555</td>
<td>222-555-4141</td>
<td>✔</td>
</tr>
<tr>
<td>Executive</td>
<td>Jane Smith</td>
<td><a href="mailto:jsmith@org.com">jsmith@org.com</a></td>
<td>Chief Information Officer</td>
<td>222-222-2222</td>
<td>222-555-2121</td>
<td>✔</td>
</tr>
<tr>
<td>Last Resort</td>
<td>Jane Smith</td>
<td><a href="mailto:jsmith@org.com">jsmith@org.com</a></td>
<td>Chief Information Officer</td>
<td>222-222-2222</td>
<td>222-555-2121</td>
<td>✔</td>
</tr>
<tr>
<td>Maintenance</td>
<td>Organization Support Center</td>
<td><a href="mailto:support@org.com">support@org.com</a></td>
<td>Organization 24hr Support Center</td>
<td>222-222-3333</td>
<td>✔</td>
<td></td>
</tr>
<tr>
<td>Maintenance</td>
<td>Sam Cloud</td>
<td><a href="mailto:scloud@org.com">scloud@org.com</a></td>
<td>Senior Engineer</td>
<td>222-222-5555</td>
<td>222-555-4141</td>
<td>✔</td>
</tr>
<tr>
<td>Security Operations</td>
<td>Security Abuse</td>
<td><a href="mailto:abuse@org.com">abuse@org.com</a></td>
<td>Security &amp; Abuse</td>
<td>222-222-7777</td>
<td>✔</td>
<td></td>
</tr>
</tbody>
</table>

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*Available only to clients with OARnet direct internet access subscription

**Editors can add multiple contacts to certain roles.**

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**Opt-out of After Hours Support**

*Editors can opt out of after hours support**

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**Help, Contact OARnet, Resources & more**

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*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 **edit icon** to the right of the role.
3. Choose the contact you want to assign to role.
   
   a. If the contact does not exist, click **Add 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 location. 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...).
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.
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 edit 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.
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. 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 **edit icon** to the right of the role.
4. Choose the contact you want to assign to role.
   a. If the contact does not exist, click **Add New Contact**.
   b. Fill in the form, click **Save**.
5. Click **Save**.

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

Inherited contacts appear in gray. Overrides and additional contacts appear in black.
Return to inherited contacts (remove an override)

To follow these instructions you must be a Gateway Editor.

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

1. Click Roles in the main menu.
2. Select the site you would like to edit.

Remove an overridden contact / return 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.

Overides and additional contacts appear in black

This will let you know if this site is inheriting contacts.
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.

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**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/afflicting 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.*

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**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 through Friday.

**Site**

**Name of Site**

Are you sure you want to opt-out?

[Cancel] [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.

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**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 the site outside of Business Hours (8 a.m. - 5 p.m. Monday through Friday). This includes service/wafering issues.

In the event of an incident outside Business Hours, OARnet will notify the site Escalation 1 contact via e-mail and request normal escalation procedures are followed. 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.

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**Resume After Hours Support**

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

**Site Name of Site**

Resume After Hours Support

Cancel  Yes