

Gateway Contact Management Guide

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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.

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.

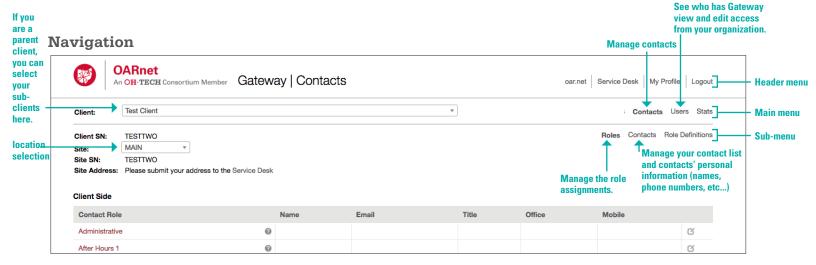
View Gateway Editors by going to Users in the main menu.

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 overriden**.

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.



Location Selection



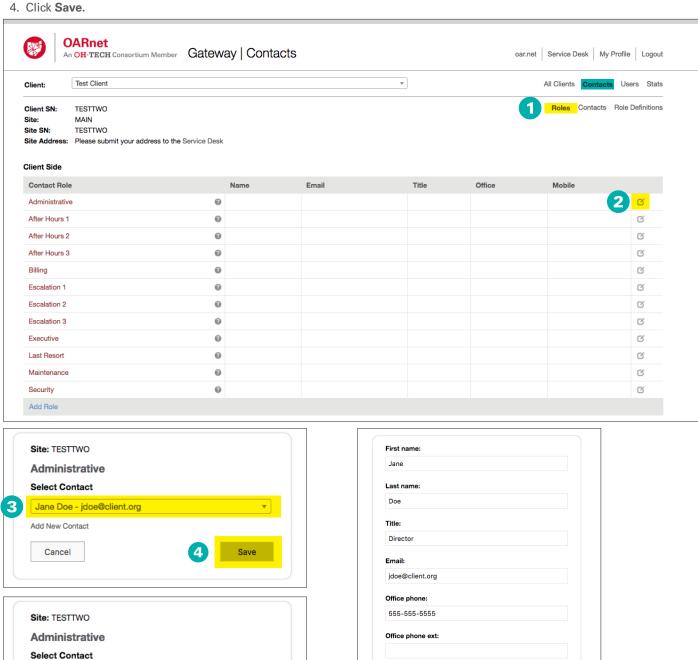
Gray entries indicate contact roles are inherited. You can override by clicking the edit button and assigning a new contact.



Assign (or replace) a contact to a role

Per OARnet policy, required roles must always have a contact assigned, therefore required roles cannot be removed from the list. You can reassign who is in a role at anytime by using the edit button.

- 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.
 - Click Add New Contact to add a new contact. Fill in the form, click Save and then return to the role.



Mobile phone:

Cancel

Save

or

Jane Doe - jdoe@client.org

Add New Contact

Cancel

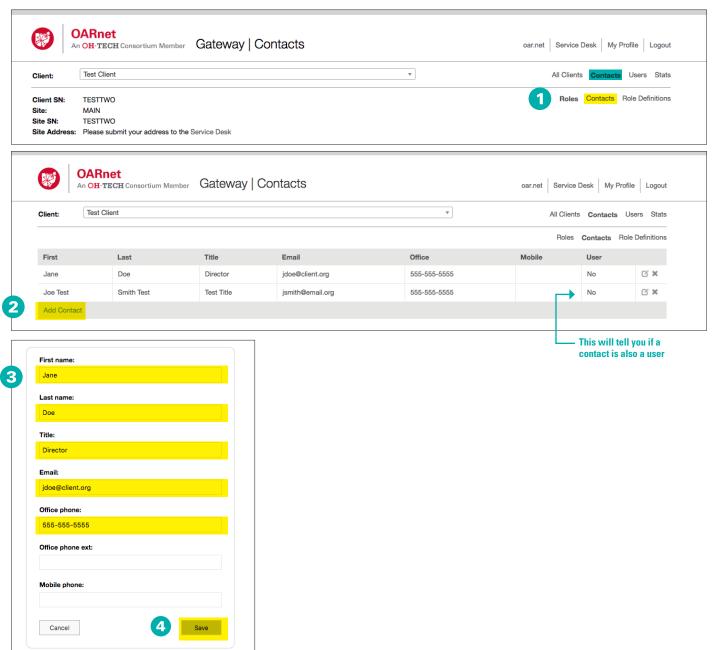


Add a new contact

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....)



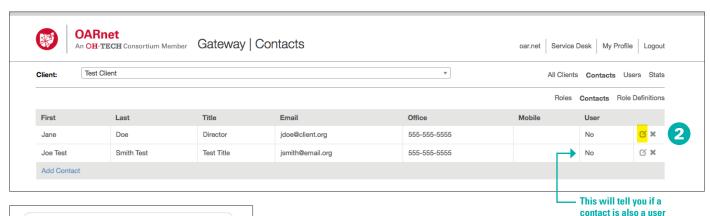


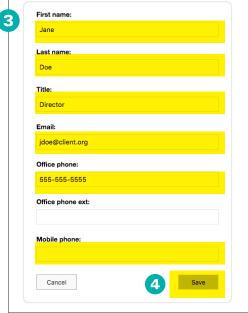
Edit a contact's personal information

- 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.





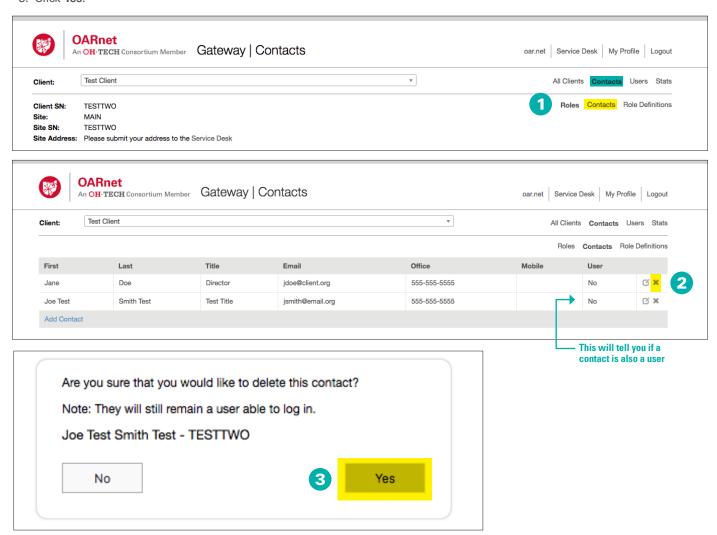




Remove a contact from the contact list

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 are registered to the location, 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.

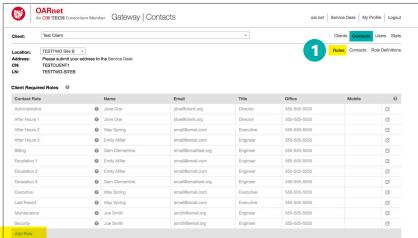
- 1. Click Contacts in the sub-menu.
- 2. Click the **delete icon** (x) to the right of the name.
- 3. Click Yes.





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.



Site: TESTTWO Site B Site: TESTTWO Site B Select Role **Select Role** Administrative Administrative **Select Contact Select Contact** Select a contact... 4 September June - email123@email.com or Add New Contact 4 Add New Contact Cancel Save Cancel Save An additional contact for Administrative has been added. Jane OARnet
An OH-TECH Consortium Member Gateway | Contacts oar.net | Service Desk | My Profile | Logout Last name: Clients Contacts Users State TESTTWO Site B v Please submit your address to the Service Desk
TESTCLIENT1
TESTTWO-SITEB Title: Director Contact Role Office Ø× jdoe@client.org 222-222-2222 G × Office phone: 555-555-5555 Sam Clemer 555-555-5555 @ Emily Miller Office phone ext: May Spring

Joe Smith

Mobile phone:

555-555-5555

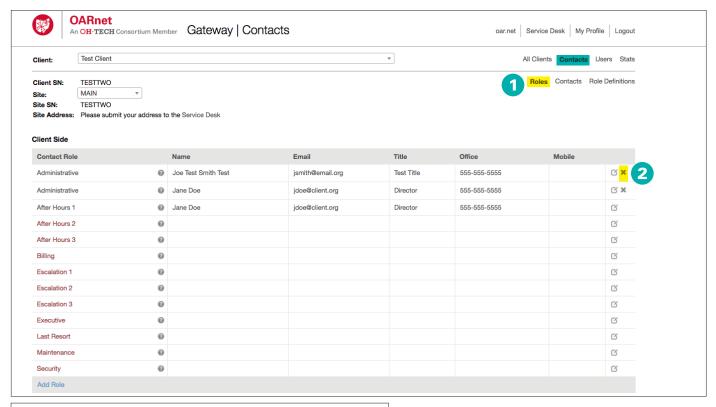


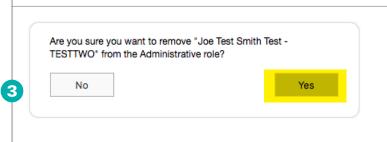
Remove an optional or additional role

If you have multiple required roles, you will only be able to remove the additional role(s). Required roles cannot be removed (per OARnet Contact Policy). 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.

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.





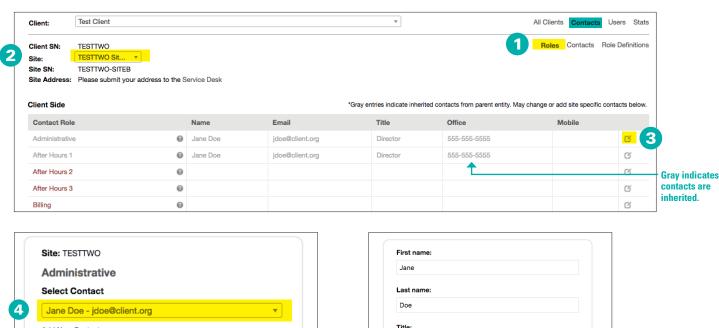


Override an Inherited Contact

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

- 1. Click Roles in the sub-menu.
- 2. Select the location 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 location specific roles as well by following the "add role" instructions in this document (click **Add Role** at the bottom of the roles).





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





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:

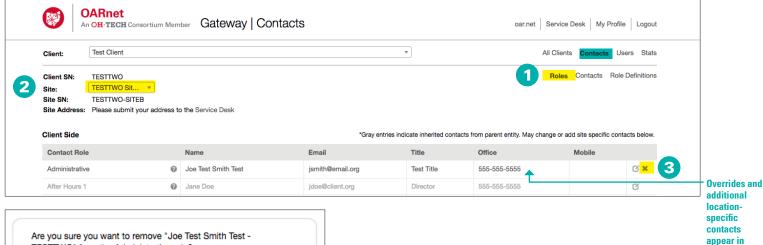
- 3. Click the delete icon (x) to the right of the role.
- 4. Click Yes. It will default to the inherited contact.

Remove an optional contact:

- 5. Click the **delete icon (x)** to the right of the role.
- 6. Click Yes. If 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.



TESTTWO" from the Administrative role? No

contacts appear in black.

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

