



## 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 `jd@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.**

## Navigation

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

Location selection

See who has Gateway view and edit access from your organization.

The screenshot shows the OARnet Gateway | Contacts page. The header includes the OARnet logo, "An OH·TECH Consortium Member", and the page title "Gateway | Contacts". On the right, there is a header menu with links for "oar.net", "Service Desk", "My Profile", and "Logout". Below the header, there is a main menu with "Contacts", "Users", and "Stats". A sub-menu is open under "Contacts", showing "Roles", "Contacts", and "Role Definitions".

Annotations include:

- "Header menu" pointing to the top right navigation links.
- "Main menu" pointing to the "Contacts", "Users", and "Stats" links.
- "Sub-menu" pointing to the "Roles", "Contacts", and "Role Definitions" links.
- "Manage contacts" pointing to the "Contacts" sub-menu item.
- "Manage the role assignments." pointing to the "Roles" sub-menu item.
- "Manage your contact list and contacts' personal information (names, phone numbers, etc...)" pointing to the "Contacts" sub-menu item.

The main content area shows a "Client:" dropdown menu set to "Test Client". Below it are fields for "Client SN: TESTTWO", "Site: MAIN", "Site SN: TESTTWO", and "Site Address: Please submit your address to the Service Desk". A "Client Side" table is displayed below.

Contact Role	Name	Email	Title	Office	Mobile	
Administrative						
After Hours 1						

## Location Selection

Location selected  
Black text indicates the role has been locally overridden.

The screenshot shows the OARnet Gateway | Contacts page with the "Site:" dropdown menu set to "TESTTWO Sit...". The "Client Side" table is updated with specific contact information.

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		

Annotations include:

- "Location selected" pointing to the "Site:" dropdown menu.
- "Black text indicates the role has been locally overridden." pointing to the "Administrative" and "After Hours 1" rows in the table.

A note at the bottom of the table states: "\*Gray entries indicate inherited contacts from parent entity. May change or add site specific contacts below."

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



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

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.
4. Click **Save**.

**Site:** TESTTWO

**Administrative**

**Select Contact**

**3** Jane Doe - jdoe@client.org

Add New Contact

Cancel **4** Save

or

**Site:** TESTTWO

**Administrative**

**Select Contact**

Jane Doe - jdoe@client.org

**3** Add New Contact

Cancel **4** 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**.

## 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....)

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**.

## 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 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**.

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

1 Roles **Contacts** Role Definitions

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

2

This will tell you if a contact is also a user

Are you sure that you would like to delete this contact?

Note: They will still remain a user able to log in.

Joe Test Smith Test - TESTTWO

No **Yes**

3



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**.

Client: Test Client

Location: TESTTWO Site B

Address: Please submit your address to the Service Desk

Client Required Roles

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

Site: TESTTWO Site B

Select Role

**3** Administrative

Select Contact

**4** September June - email123@email.com

Add New Contact

Cancel **5** Save

Site: TESTTWO Site B

Select Role

Administrative

Select Contact

Select a contact...

**4** 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

An additional contact for Administrative has been added.

Client: Test Client

Location: TESTTWO Site B

Address: Please submit your address to the Service Desk

Client Required Roles

Contact Role	Name	Email	Title	Office	Mobile
Administrative	Jane Doe	jdoe@client.org	Director	555-555-5555	
Administrative	September June	email123@email.com	Title	222-222-2222	
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	

Add Role



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 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**.

**OARnet**  
An OH·TECH Consortium Member

Gateway | Contacts

oar.net | [Service Desk](#) | [My Profile](#) | [Logout](#)

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Client: Test Client

All Clients **Contacts** Users Stats

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Client SN: TESTTWO

Site: MAIN

Site SN: TESTTWO

Site Address: Please submit your address to the Service Desk

**1** Roles Contacts Role Definitions

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**Client Side**

Contact Role	Name	Email	Title	Office	Mobile	
Administrative	Joe Test Smith Test	jsmith@email.org	Test Title	555-555-5555		✕ <b>2</b>
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](#)

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

No

Yes

10/25/2017

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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 location, these appear in gray. Gateway Editors can override 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).

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

Client SN: TESTTWO **1** Roles Contacts Role Definitions

Site: TESTTWO Sit... **2**

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		<b>3</b>
After Hours 1	Jane Doe	jdoe@client.org	Director	555-555-5555		
After Hours 2						
After Hours 3						
Billing						

Gray indicates contacts are inherited.

Site: TESTTWO

**Administrative**

Select Contact

Jane Doe - jdoe@client.org **4**

Add New Contact

Cancel **5** Save

or

Site: TESTTWO

**Administrative**

Select Contact

Jane Doe - jdoe@client.org **4**

Add New Contact **5**

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

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

**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	
<b>Administrative</b>	Joe Test Smith Test	jsmith@email.org	Test Title	555-555-5555		<b>6</b>
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.

The screenshot shows the 'Gateway | Contacts' page for 'Test Client'. The 'Roles' tab is selected. A table lists contact roles for 'Administrative' and 'After Hours 1'. The 'Administrative' role has a contact for 'Joe Test Smith Test' with a delete icon (x) highlighted by a red circle 3. A red circle 2 highlights the 'Site' dropdown menu. A red circle 1 highlights the 'Roles' tab. A note at the bottom right states: 'Overrides and additional location-specific contacts appear in black.'

A confirmation dialog box asks: 'Are you sure you want to remove "Joe Test Smith Test - TESTTWO" from the Administrative role?'. There are 'No' and 'Yes' buttons. The 'Yes' button is highlighted with a red circle 4.

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

**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	

A red circle 5 highlights the 'Administrative' row in the table.