



Gateway User & Editor Guide

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Please Review

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. You may have many users but only want specific ones to be able to edit your contacts.

Contacts are individuals and their personal information such as name, title, phone & email. The contact list allows you to maintain personal information in one location. You can then apply a contact to one or multiple roles.

Roles are functions contacts are assigned to based on the **OARnet Contact Policy & Role Definitions**.

See the Contact Management Guide to learn more about contact operations.

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).



Gateway User & Editor Guide

If you are a new client, your Client Relations representative helps identify who at your organization is OARnet’s first point-of-communication. This is typically, but not always, the person who fulfills the Administration Contact Role (see the Contact Policy & Role Definitions). That person will receive an email with instructions on how to register for the Gateway.

Users (view access)

Registration requests are made at gateway.oar.net. The registration request goes to the OARnet Support Center (NOC). The Support Center will verify the request with your organization’s Administrative Contact to ensure access should be granted.

Registered individuals have **view** access to the resources on Gateway.

Gateway Editors (edit access)

Editors are registered users who have **edit** access to manage your organization’s contacts and users. Gateway Editors can make other users editors and remove users.

There always must be a Gateway Editor to manage contacts at all times, per OARnet Contact Policy. There is no limit to the number of Gateway Editors an organization can have.

NOTE By default, the first two authorized users from your organization are automatically made Gateway Editors. This is a way to ensure there is always an editor. However, organizations can manage Gateway Editors (see instructions in this document). If the Support Center gets a request by a user to become a Gateway Editor, they will check with your organization’s Administrative Contact before granting edit access.

Client 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 anything directly related to the client, such as user access, stats and contacts). Sub-clients can have their own editors and users.

Parent / Sub-client relationship is determined on an administrative case-by-case basis.

IP Address Requirements

Connectivity from an OARnet client IP address space is required to access the Gateway. If you are a client without OARnet IP connectivity, please submit your IP Ranges to the Support Center. Once your IP Ranges have been added to our system, you will be notified and then you will be able to register at gateway.oar.net.

Navigation

View your list of users and editors by going to the **Users** section in the main menu. Users have view access to this page, while Gateway Editors have edit access.

The screenshot shows the 'Gateway | Users' page. At the top left is the OARnet logo and 'An OH·TECH Consortium Member'. The page title is 'Gateway | Users'. On the right, there are links for 'oar.net', 'Service Desk', 'My Profile', and 'Logout'. Below the header, there is a 'Client:' field with 'Client Name' and a search icon. To the right of this field are three menu items: 'Contacts', 'Users' (highlighted in yellow), and 'Stats'. A blue arrow points to the 'Users' menu item with the text: 'See who has a registered account as well as edit access.' Below the menu items is a table with the following data:

First	Last	Username	Gateway Editor	
Jane	Doe	jdoe@email.org	Yes	✕
Julie	Miller	jmillier@email.org	No	✕
Joe	Smith	jsmith@email.org	Yes	✕

Annotations on the right side of the table:

- A blue arrow points to the 'Main menu' (Contacts, Users, Stats) with the text: 'Main menu'.
- A blue arrow points to the '✕' icon in the first row with the text: 'This will completely remove a user from the system and they will no longer be able to login.'
- A blue arrow points to the 'Gateway Editor' column with the text: 'This is a list of all your users. Yes or No indicates if they can make changes.'



To follow these instructions make sure you are in the **Users** section in the main menu and that you are a **Gateway Editor**.

If you are not an editor but need to be, you can ask your current Gateway Editor(s) (there will always be an editor at every organization) to make you one or submit a ticket to the OARnet Support Center. The Support Center will verify with your Administrative Contact (who is listed on the Contacts page) if you should have edit access.

Make a user a Gateway Editor

1. Click **No** in the Gateway Editor column of the user you want to make an editor.
2. Check the box.
3. Click **Save**.

It will now say **Yes** in the Gateway Editor column, signifying their new status.

oar.net | Service Desk | My Profile | Logout

Client: Client Name Contacts **Users** Stats

First	Last	Username	Gateway Editor	
Jane	Doe	jdoe@email.org	Yes	✕
Julie	Miller	jmiller@email.org	No	✕
Joe	Smith	jsmith@email.org	Yes	✕

jmiller@email.org

Is Editor:

This person can edit roles, contacts, and users.

Cancel 3 Save

Remove an editor's edit access (remains a user with view access).

1. Click **Yes** in the Gateway Editor column next to the name.
2. Un-check the box.
3. Click **Save**.

It will now say **No** in the Gateway Editor column. They can still login, but no longer can make changes on the Gateway.

oar.net | Service Desk | My Profile | Logout

Client: Client Name Contacts **Users** Stats

First	Last	Username	Gateway Editor	
Jane	Doe	jdoe@email.org	Yes	✕
Julie	Miller	jmiller@email.org	No	✕
Joe	Smith	jsmith@email.org	Yes	✕

jsmith@email.org

Is Editor:

This person can edit roles, contacts, and users.

Cancel 3 Save



To follow these instructions make sure you are in the **Users** section in the main menu and that you are a **Gateway Editor**.

Remove a user

Only **Gateway Editors** (or OARnet staff) can remove users from the Gateway. This will delete the user from the system and they will no longer be able to login. If they are also a Listed Contact, it will remove that contact as well (as linked by email account). Please see the OARnet Contact Policy and reassign contacts to roles as needed.

1. Click the **delete icon (x)** next to the name of the user you wish to remove.
2. Click the **Yes**.

First	Last	Username	Gateway Editor	
Jane	Doe	jdoe@email.org	Yes	x
Julie	Miller	jmiller@email.org	No	x
Joe	Smith	jsmith@email.org	Yes	x

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

jsmith@email.org



Gateway Registration

IP Address Requirements

An OARnet IP address space is required to access the Gateway. If you are a client without OARnet IP address space, please submit your IP Ranges to the Support Center. Once your IP Ranges have been added to our system, you will be notified and then you will be able to register at gateway.oar.net.

NOTE By default, the first two people to register from your organization are automatically Gateway Editors. This is a way to ensure someone is an editor, however your organization can control what users are the Gateway Editors (see instructions in this document).

Register

1. Go to gateway.oar.net.
2. Click the **Register here!** link.
3. Fill in the required fields.
4. Click **Register**.
 - The registration is then sent to the OARnet Support Center. The Support Center will contact your organization's Administration Contact to verify the requester should have access to the Gateway. If you are a new client, the Support Center will verify the requests with your Client Relationship representative.
5. You will receive an email that indicates your registration has been accepted (**please check your spam folder**)
 - Follow the instructions on the email to create a password.
 - At this time you will have seven days to set your password. If you do not set your password within seven days your registration request will expire and you will need to register again.
6. Once your password is created, refresh your browser and login at gateway.oar.net.
7. If the verification was denied by Administration Contact, the requester will receive a denial email.



Password Reset

Only registered users can use the "reset password" function. If you have not registered, please see the registration instructions.

1. Go to **gateway.oar.net**.
2. Click the **Reset Password!**.
3. Type in your email address you used at registration.
4. Click **Reset**.
5. You will receive an email with instructions to reset your password. **Please also check your spam folder.**
 - The password reset expires after seven days. If you do not reset your password within that time you will need to send a new request.
6. Refresh your browser then login at gateway.oar.net.