Establishing Users and Contacts for the enCloud™ Management System

Encore Networks’ cloud management system, enCloud™, provides management of your connected Encore devices via a web portal. Using a web browser, tablet, or smartphone, you can gain access to enCloud from anywhere. The enCloud management system manages Encore Networks’ EN-1000™, EN-2000™, and EN-4000™ routers.

See the following documents for additional information to set up your enCloud account:

- *Account Registration and Log-In for the enCloud™ Management System*
- *Developing Accounts in the enCloud™ Management System*
- *Use Cases and Groups in the enCloud™ Management System*.
- *Devices and Hardware Profiles in the enCloud™ Management System*.
- *Developing Rules for the enCloud™ Management System*

5.1 Users and Contacts

Users may be added to distributor accounts or customer accounts in the enCloud system. Contacts are added to a customer account.

A user may function as a viewer of an entity (for example, to monitor devices in an account) or as an administrator of an entity (for example, to manage devices in an account). A distributor user with administrative permission and a customer user with administrative permission have the same capabilities, with different scopes.

A contact may receive notification when a rule is triggered. A contact can be used to store contact information for someone you may wish to notify of certain events, but who has no access to the enCloud system—for example, the manager of a customer location who might be wondering why his/her internet connection is no longer functioning (and needs to know that it is because a router is off line).

See the following:

- Section 5.1.1, *Navigation to the Distributor Account*, on page 2
- Section 5.1.2, *Customer Users*, on page 2

- Section 5.1.3, *Customer Contacts*, on page 5
- Section 5.1.4, *Distributor Users*, on page 10
- Section 5.1.5, *Assigning a User or a Contact*, on page 11
- Section 5.1.6, *Reviewing and Editing Settings for a User or Contact*, on page 12

5.1.1 Navigation to the Distributor Account

1 Do one of the following:

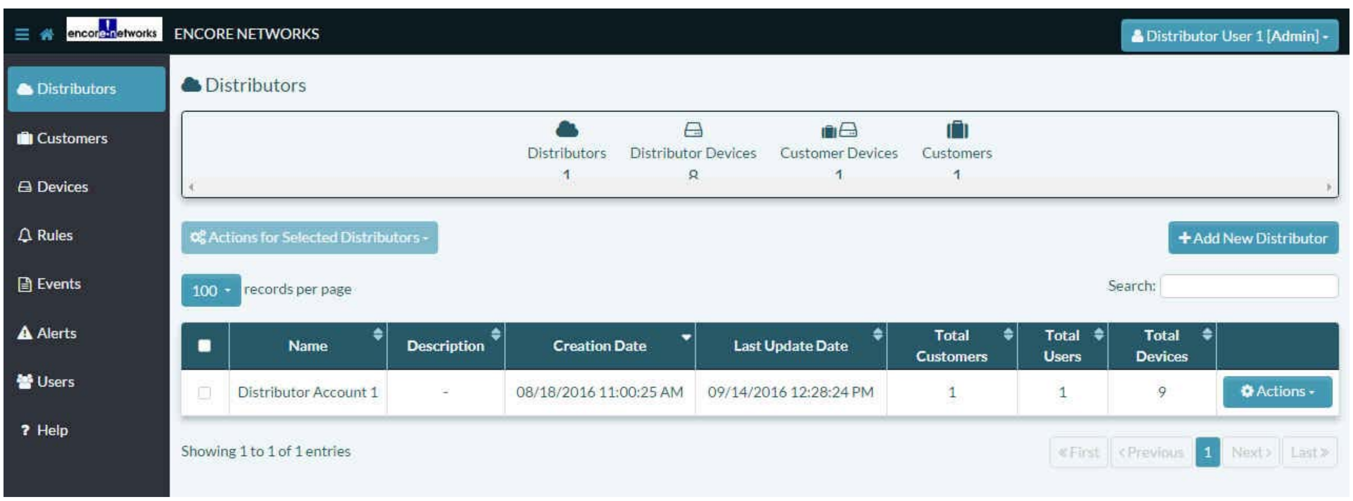
a If you are at the distributor level in enCloud, select **Distributors** in the enCloud menu (along the left side of the screen).

b If you are at a customer level in enCloud, find the Account Navigation Button (Figure 5-1) near the top left of the screen, beside the logo for Encore Networks, Inc., and select **Go Back to Distributor**.

Figure 5-1. Account Navigation Button

» In either case, the Table of Distributor Accounts is displayed (Figure 5-2).

Figure 5-2. Table of Distributor Accounts



5.1.2 Customer Users

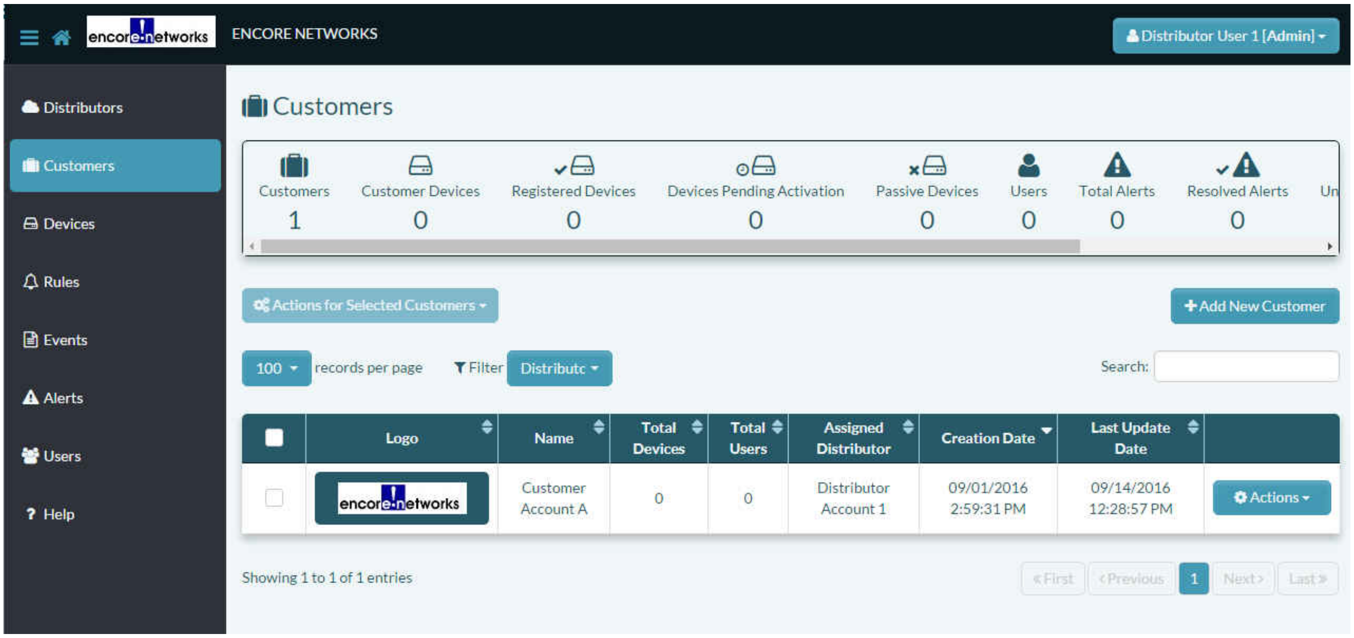
To add a customer user, do the following:

1 Follow the steps in Section 5.1.1, *Navigation to the Distributor Account*, on page 2, to display the Table of Distributor Accounts (recall Figure 5-2).

2 Select **Customers** in the enCloud menu (along the left side of the screen).

» The distributor's Table of Customer Accounts is displayed (Figure 5-3).

Figure 5-3. Table of Customer Accounts



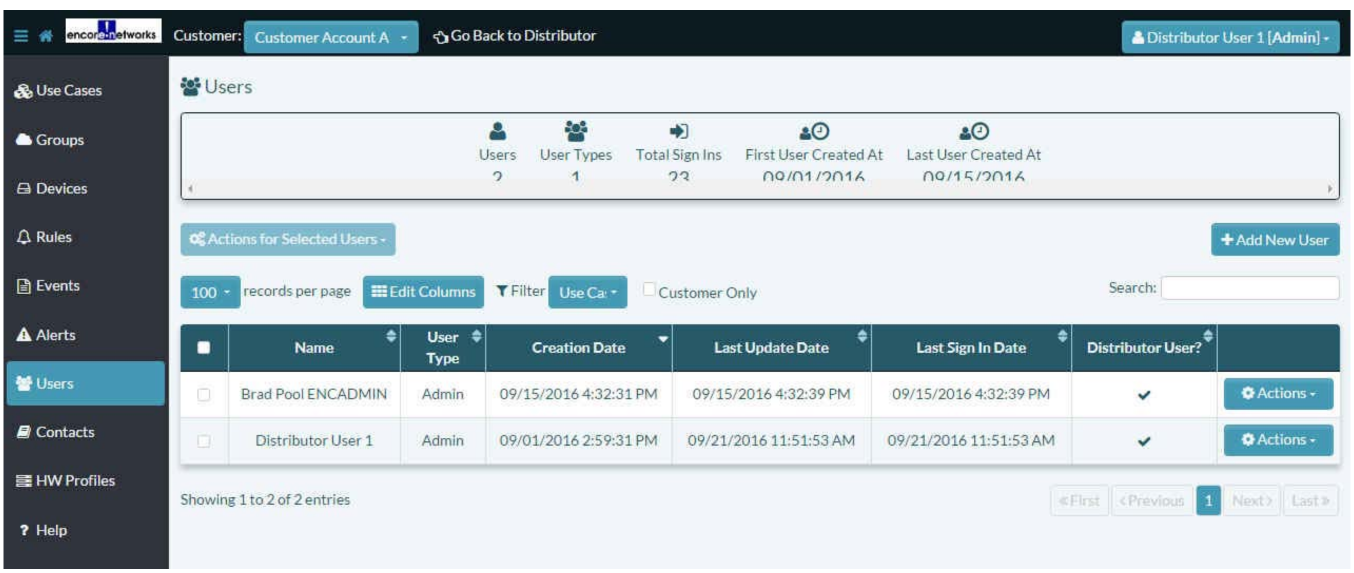
3 Select a customer in the table.

» The customer account's Table of Use Cases is displayed.

4 Select **Users** in the enCloud menu (along the left side of the screen).

» The customer account's Table of Users is displayed (Figure 5-4).

Figure 5-4. Table of Users

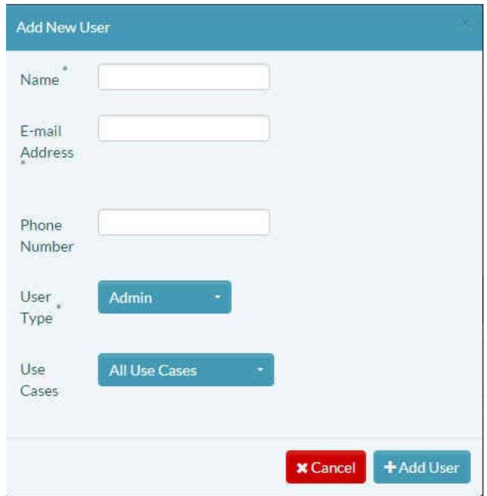


Note: Make sure the Account Navigation Button is displayed (recall Figure 5-1), to verify that you are at the customer level.

5 Select the button to **Add New User** (above the right side of the table).

» The Panel to Add a Customer User is displayed (Figure 5-5).

Figure 5-5. Panel to Add a Customer User



6 In the Panel to Add a Customer User, do the following:

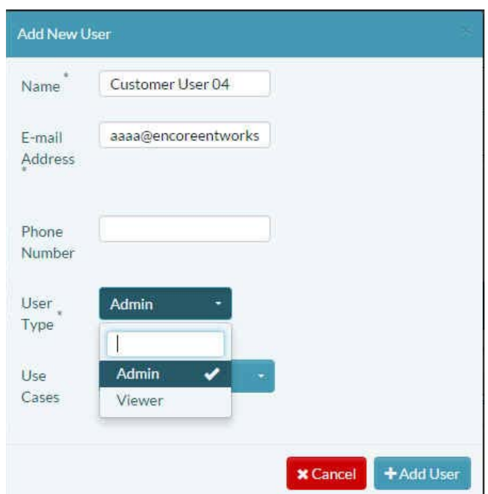
a Type a user **Name** for the customer user.

b Type an **Email Address** for the customer user.

c (Optional) Type a **Phone Number** for the customer user.

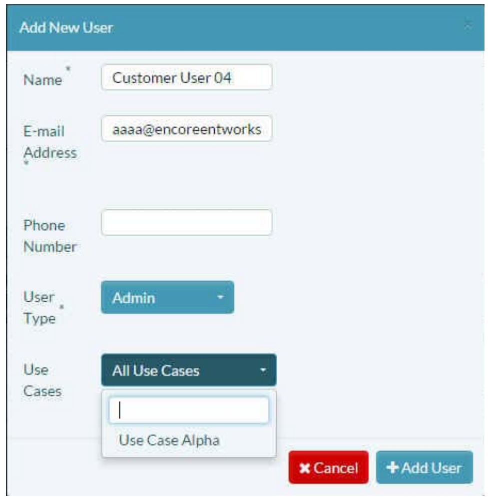
d Select the **User Type** field, and, in the dropdown list, assign the customer user **Admin** or **Viewer** permission for the customer account (Figure 5-6).

Figure 5-6. Panel to Add a Customer User: Set Customer User's Permission Level



e Select the **Use Cases** field, and, in the dropdown list, select specific use cases (or leave **All Use Cases** in the field) so that the customer user has **Viewer** or **Admin** permission for the specified use cases in the customer account (Figure 5-7).

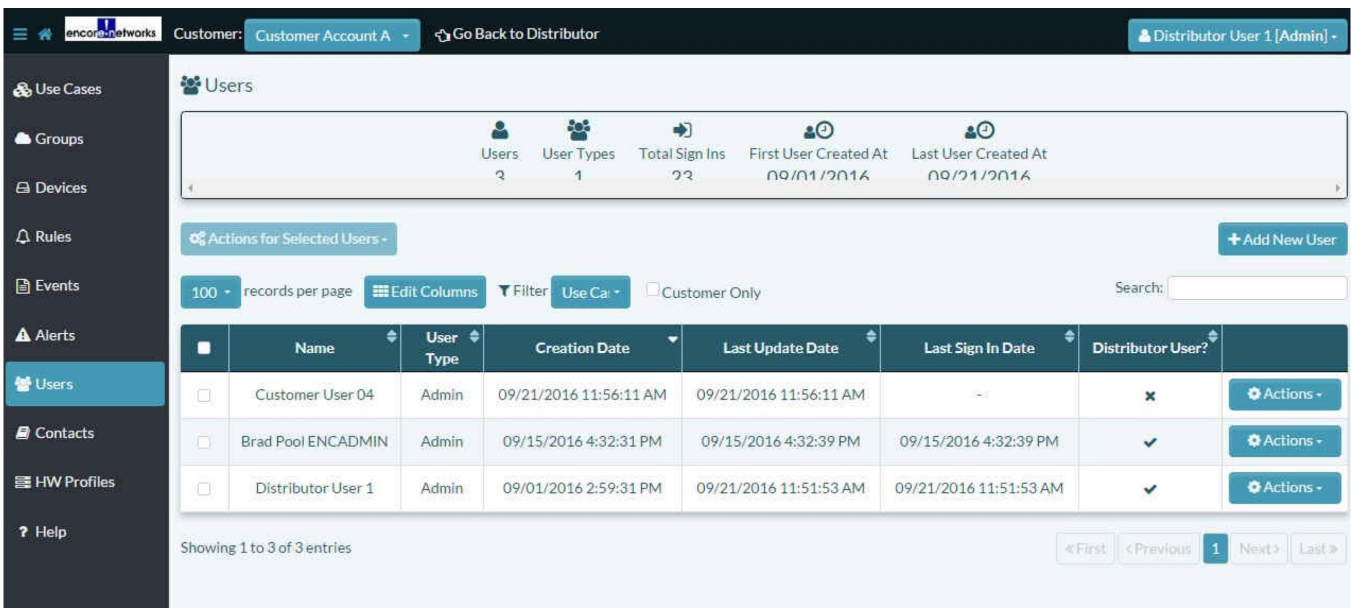
Figure 5-7. Panel to Add a Customer User: Select Use Cases



f After you have finished configuring the new user, select the button to **Add User**.

» The user is created and is added to the redisplayed Table of Users (Figure 5-8).

Figure 5-8. Table of Users



5.1.3 Customer Contacts

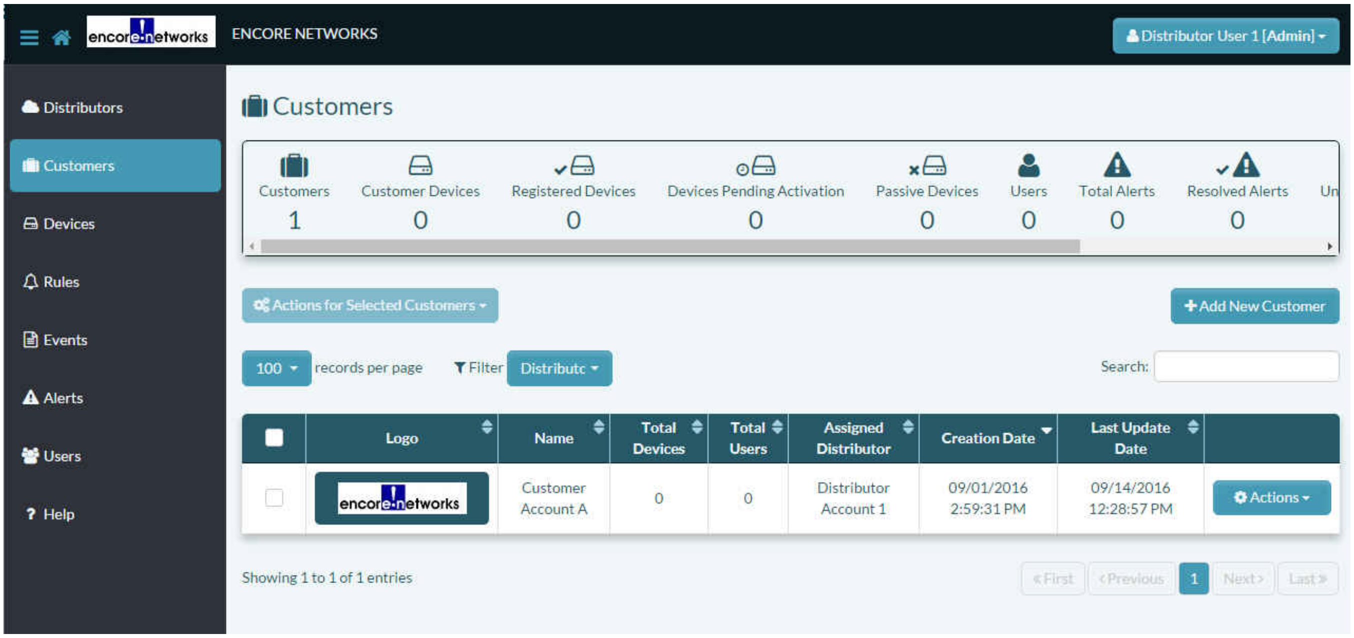
To add a customer contact, do the following:

1 Follow the steps in Section 5.1.1, *Navigation to the Distributor Account*, on page 2, to display the Table of Distributor Accounts (recall Figure 5-2).

2 Select **Customers** in the enCloud menu (along the left side of the screen).

» The distributor’s Table of Customer Accounts is displayed (Figure 5-9).

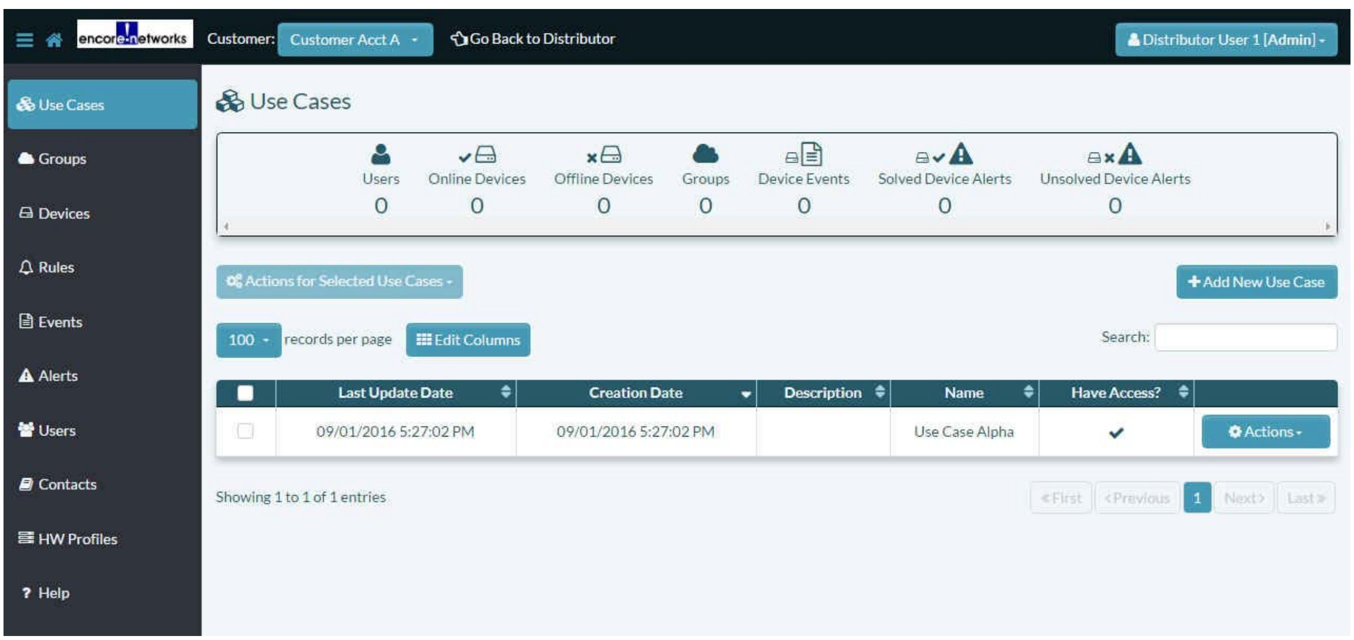
Figure 5-9. Table of Customer Accounts



3 Select a customer in the table.

» The customer's Table of Use Cases is displayed (Figure 5-10).

Figure 5-10. Table of Use Cases

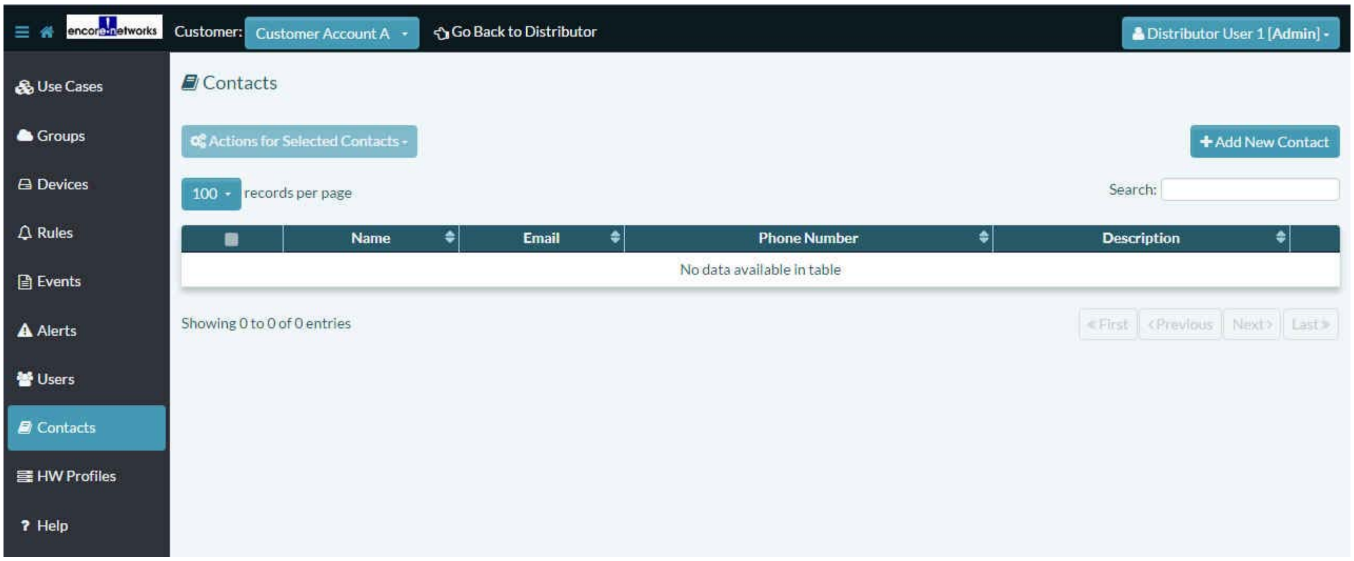


4 Select **Contacts** in the enCloud menu (along the left side of the screen).

» The customer's Table of Contacts is displayed (Figure 5-11).

Note: In Figure 5-11, no contacts have been added to the customer account.

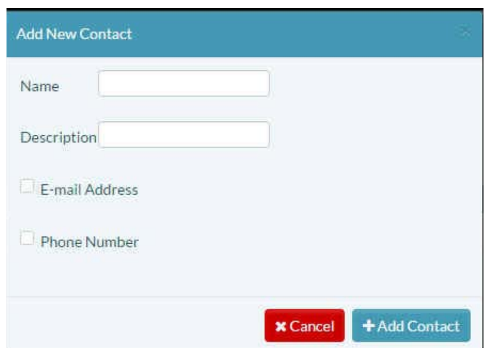
Figure 5-11. Table of Contents



5 Select the button to **Add New Contact** (above the right side of the table).

» The Panel to Add a Customer Contact is displayed (Figure 5-12).

Figure 5-12. Panel to Add a Customer Contact

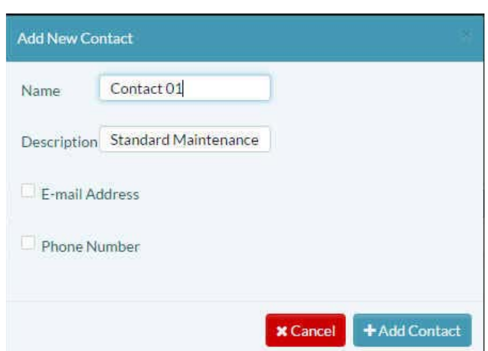


6 In the Panel to Add a Customer Contact, do the following:

a Type a user **Name** for the customer contact.

b Type a user **Description** for the customer contact.

Figure 5-13. Panel to Add a Customer Contact: User Name and Description

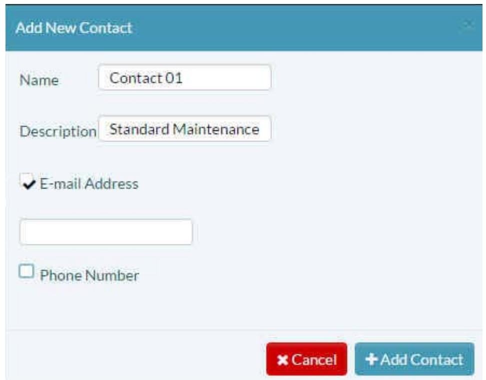


c Do one (or both) of the following:

i Click to select the box for **Email Address** for the customer contact.

» A field will open in the panel, to add an email address (Figure 5-14). Type an **Email Address** for the customer contact.

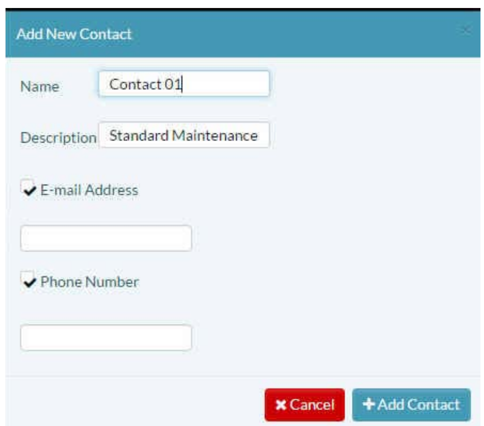
Figure 5-14. Panel to Add a Customer Contact: Email Address



ii Click to select the box for **Phone Number** for the customer contact.

» A field will open in the panel, to add a telephone number (Figure 5-15). Type a **Phone Number** for the customer contact.

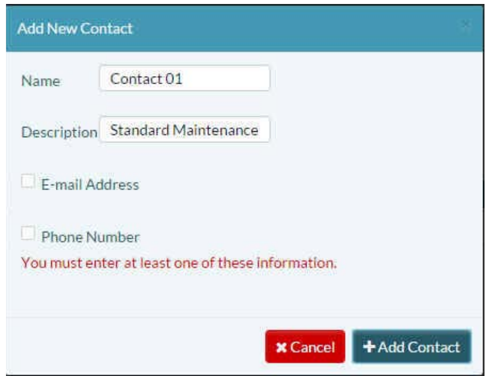
Figure 5-15. Panel to Add a Customer Contact: Telephone Number



d After you have finished configuring the new user, select the button to **Add Contact**.

Warning: If you typed neither an email address nor a phone number for the contact, a message will be displayed, indicating that you must supply one or the other (Figure 5-16).

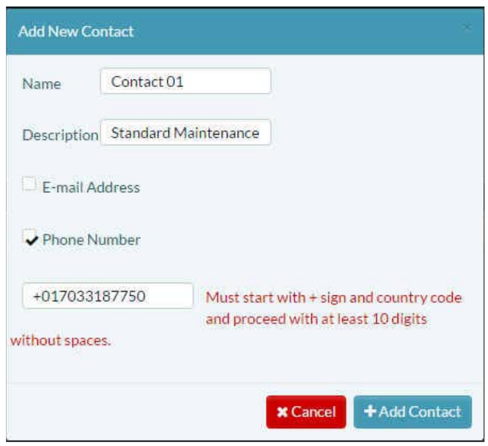
Figure 5-16. Panel to Add a Customer Contact: Contact Method is Required



e Type an **Email Address** or a **Phone Number** in the appropriate field(s). Then select the button to **Add Contact**.

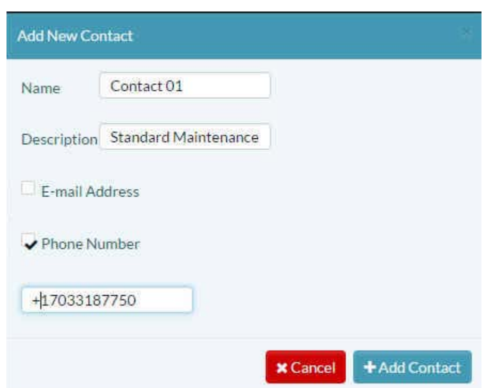
Warning: If the format for the contact information is incorrect, the panel will advise the correct format for the field.

Figure 5-17. Panel to Add a Customer Contact: Use Correct Format for Telephone Number



f Revise the **Email Address** or **Phone Number** to follow the prescribed format (Figure 5-18).

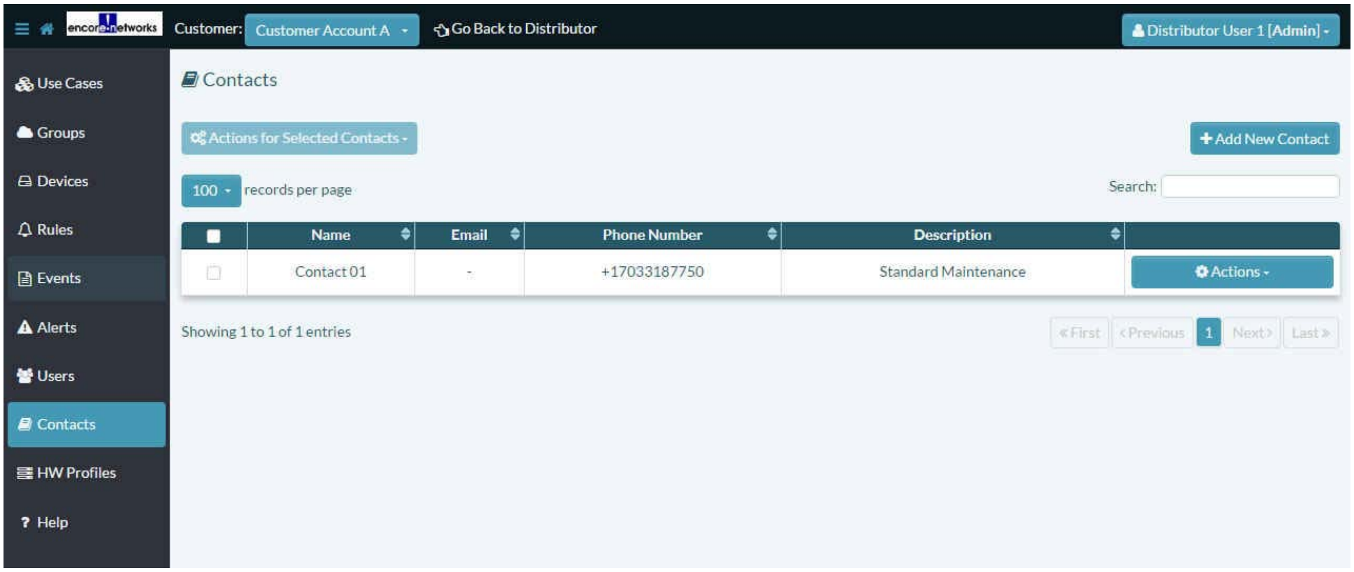
Figure 5-18. Panel to Add a Customer Contact: Corrected Telephone Number



g Then select the button to **Add Contact**.

» The contact is created and is added to the redisplayed Table of Contacts (Figure 5-19).

Figure 5-19. Table of Contacts



See Section 5.1.5, *Assigning a User or a Contact*, on page 11.

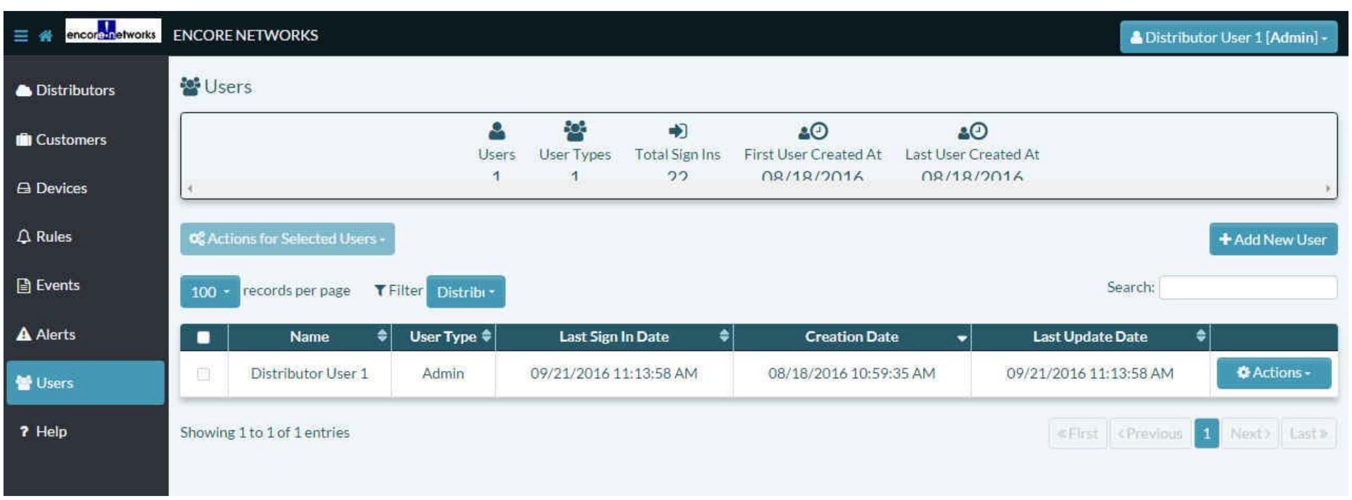
5.1.4 Distributor Users

To add a distributor user, do the following:

1. Follow the steps in Section 5.1.1, *Navigation to the Distributor Account*, on page 2, to display the Table of Distributor Accounts (recall Figure 5-2).
2. Select **Users** in the enCloud menu (along the left side of the screen).

   » The distributor's Table of Users is displayed (Figure 5-20).

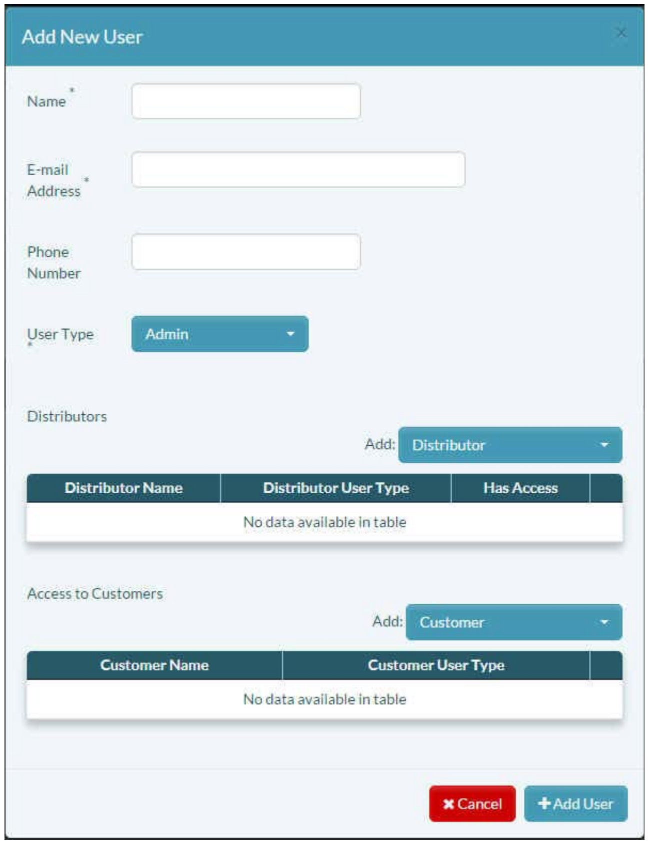
Figure 5-20. Table of Users



3. Select the button to **Add New User** (above the right side of the table).

   » The Panel to Add a Distributor User is displayed (Figure 5-21).

Figure 5-21. Panel to Add a Distributor User



4 In the Panel to Add a Distributor User, do the following:

a Type a user **Name** for the distributor user.

b Type the user's **Email Address**.

c (Optional) Type the user's **Phone Number**.

d Select the **User** Type field, and, in the dropdown box, select **Admin**.

Note: Always give yourself administrative permission until you have assigned another distributor user administrative permission to manage an account, user, or other entity.

e Select the **Distributor** field, and, in the dropdown box, select the distributor accounts the new user will have access to.

f Select the **Customer** field, and, in the dropdown box, select the customer accounts the new user will manage, and the permission level (**Admin** or **Viewer**) for each customer account.

g When you have finished configuring the new distributor user, select the button to **Add User**.

» The distributor's Table of Users is redisplayed.

5.1.5 Assigning a User or a Contact

Users can be assigned to accounts when the user is created. Contacts are assigned to rules; users can also be assigned to rules. The *QuickStart Guide for the enCloud™ Management*

System provides quick examples of user and contact assignment. For more detailed examples, see the following:

- To assign one or more users and contacts to a rule, see the document *Developing Rules for the enCloud™ Management System*.
- To assign one or more users to a use case, see Section 3.2, *Use Cases*, in the document *Use Cases and Groups in the enCloud™ Management System*.

5.1.6 Reviewing and Editing Settings for a User or Contact

You may wish to review or revise users in your account. See the following:

- Section 5.1.6.1, *Reviewing a Customer User*
- Section 5.1.6.2, *Editing a Customer User*
- Section 5.1.6.3, *Reviewing or Editing a Customer Contact*
- Section 5.1.6.4, *Reviewing a Distributor User*
- Section 5.1.6.5, *Editing a Distributor User*

5.1.6.1 Reviewing a Customer User

1 Follow the steps in Section 5.1.1, *Navigation to the Distributor Account*, on page 2, to display the Table of Distributor Accounts (recall Figure 5-2).

2 Select **Customers** in the enCloud menu (along the left side of the screen).

» The distributor's Table of Customer Accounts is displayed (Figure 5-3).

3 Select a customer in the table.

» The customer's Table of Use Cases is displayed (recall Figure 5-10).

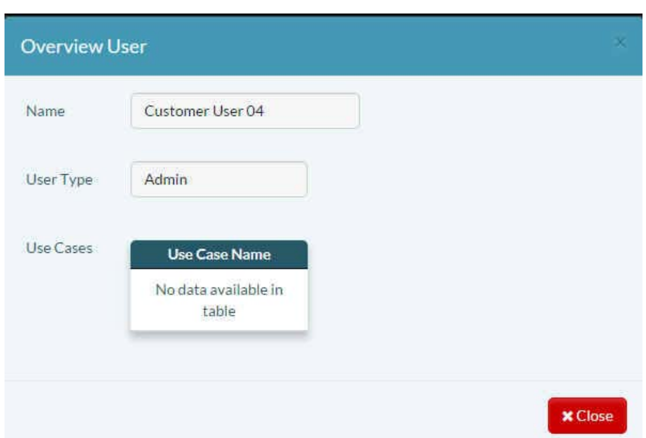
4 Select **Users** in the enCloud menu (along the left side of the screen).

» The customer's Table of Users is displayed (recall Figure 5-8).

5 Select a user in the table.

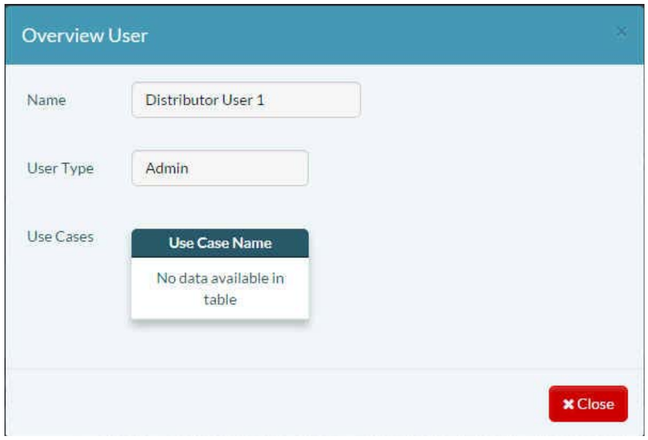
» The Overview of a Selected Customer User is displayed (Figure 5-22).

Figure 5-22. Overview of a Selected Customer User



Note: If the user you selected is a distributor user assigned to the customer account, the same information is displayed (Figure 5-23). A distributor user with administrative permission and a customer user with administrative permission can perform virtually the same operations to manage a customer account.

Figure 5-23. Overview of a Distributor User for a Customer Account



6 When you have finished reviewing the user's information, select the button to **Close** the panel.

» The Table of Users is redisplayed.

5.1.6.2 Editing a Customer User

Note: Settings for distributor users cannot be edited at the customer level. To edit a distributor user's settings, see Section 5.1.6.5, *Editing a Distributor User*.

1 Follow the steps in Section 5.1.1, *Navigation to the Distributor Account*, on page 2, to display the Table of Distributor Accounts (recall Figure 5-2).

2 Select **Customers** in the enCloud menu (along the left side of the screen).

» The distributor's Table of Customer Accounts is displayed (recall Figure 5-3).

3 Select a customer in the table.

» The customer's Table of Use Cases is displayed (recall Figure 5-10).

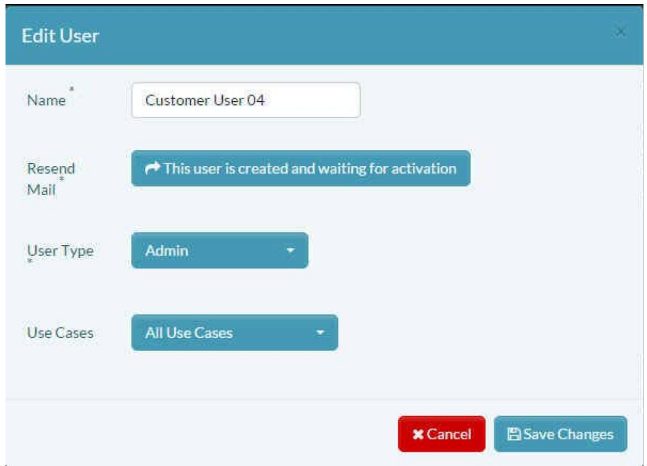
4 Select **Users** in the enCloud menu (along the left side of the screen).

» The customer's Table of Users is displayed (recall Figure 5-8).

5 At the end of a user's row, select the **Actions** button and, in the dropdown menu, select **Edit**.

» The Panel to Edit a Customer User is displayed (Figure 5-24).

Figure 5-24. Panel to Edit a Customer User



6 On this panel, revise settings for the customer user, as needed for account management.

7 When you have finished revising the user's setting, select the button to **Save Changes**.

» The customer account's Table of Users is redisplayed.

5.1.6.3 Reviewing or Editing a Customer Contact

There is no **Overview** button for a customer contact. You may review a customer contact by using the following procedure for editing a customer contact and by selecting the button to **Cancel** (without saving) when you have finished reviewing the customer contact.

1 Follow the steps in Section 5.1.1, *Navigation to the Distributor Account*, on page 2, to display the Table of Distributor Accounts (recall Figure 5-2).

2 Select **Customers** in the enCloud menu (along the left side of the screen).

» The distributor's Table of Customer Accounts is displayed (recall Figure 5-3).

3 Select a customer in the table.

» The customer's Table of Use Cases is displayed (recall Figure 5-10).

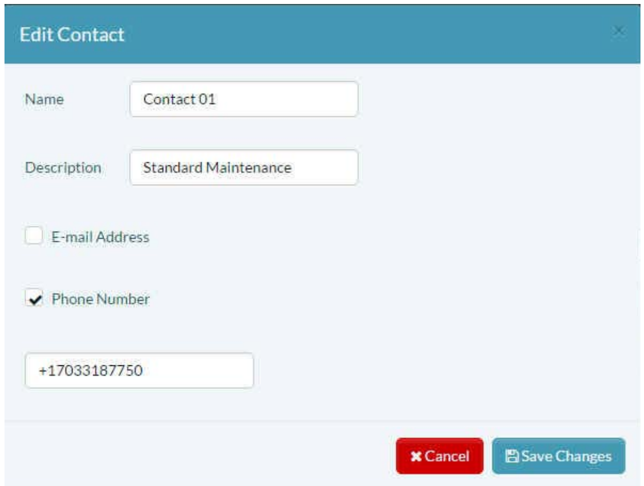
4 Select **Contacts** in the enCloud menu (along the left side of the screen).

» The customer's Table of Contacts is displayed (recall Figure 5-19).

5 Select the **Actions** button at the end of a contact's row in the table, and, in the dropdown menu, select **Edit**.

» The Panel to Edit a Customer Contact is displayed (Figure 5-25).

Figure 5-25. Panel to Edit a Customer Contact



6 On this panel, revise settings for the customer contact, as needed for account management.

7 When you have finished revising the contact's setting, do one of the following:

a If you were merely reviewing the contact's information, and you do not need to edit the information, select the button to **Cancel** (without saving).

b To save the edits for the contact, select the button to **Save Changes**.

» In either case, the customer account's Table of Contacts is redisplayed.

5.1.6.4 Reviewing a Distributor User

1 Follow the steps in Section 5.1.1, *Navigation to the Distributor Account*, on page 2, to display the Table of Distributor Accounts (recall Figure 5-2).

2 Select **Users** in the enCloud menu (along the left side of the screen).

» The distributor account's Table of Users is displayed (recall Figure 5-20).

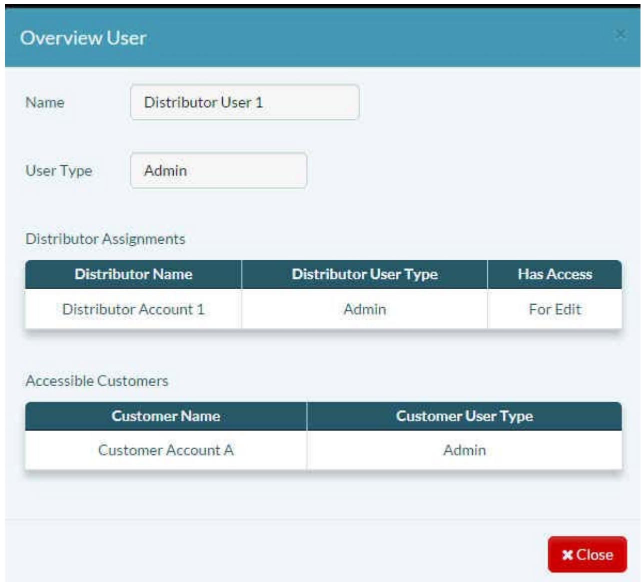
Note: Only distributor users are in this table. To view customer users, see Section 5.1.6.1, *Reviewing a Customer User*.

3 You may view any user's information. To do so, select the **Action** button (at the end of the selected user's row in the table), and, in the dropdown menu, select **Overview**.

Note: A quick way to see the overview of any item is to select that item's row.

» The Overview of the Selected Distributor User is displayed (Figure 5-26).

Figure 5-26. Overview of the Selected Distributor User



4 Review the information in the overview.

5 After you have finished reviewing the information, select the button to **Close** the panel.

» The distributor account's Table of Users is redisplayed.

5.1.6.5 Editing a Distributor User

Note: You cannot use this procedure to edit your own distributor user settings. To edit your own settings, see the document *Settings for the enCloud™ Management System*.

1 Follow the steps in Section 5.1.1, *Navigation to the Distributor Account*, on page 2, to display the Table of Distributor Accounts (recall Figure 5-2).

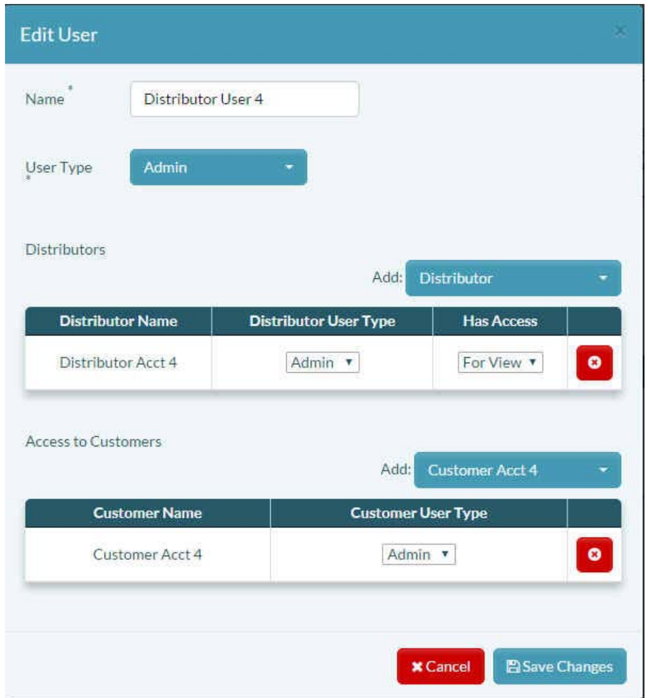
2 Select **Users** in the enCloud menu (along the left side of the screen).

» The distributor account's Table of Users is displayed (recall Figure 5-20).

3 If you have administrative permission to edit another distributor user, you may select the **Action** button at the end of that distributor user's row, and, in the dropdown list, select **Edit**.

» The Panel to Edit a Distributor User is displayed (Figure 5-27).

Figure 5-27. Panel to Edit a Distributor User



4 On this panel, revise settings for the distributor user, as needed for account management.

5 When you have finished revising the user's setting, select the button to **Save Changes**.

» The distributor account's Table of Users is redisplayed.