



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:

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

	Name	Description	Creation Date	Last Update Date	Total Customers	Total Users	Total Devices	
<input type="checkbox"/>	Distributor Account 1	-	08/18/2016 11:00:25 AM	09/14/2016 12:28:24 PM	1	1	9	⚙ Actions

Showing 1 to 1 of 1 entries

Navigation: << First < Previous 1 Next > Last >>

5.1.2 Customer Users

To add a customer user, do the following:

- 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](#)).
- 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

Customers

Customers: 1, Customer Devices: 0, Registered Devices: 0, Devices Pending Activation: 0, Passive Devices: 0, Users: 0, Total Alerts: 0, Resolved Alerts: 0

Actions for Selected Customers: [Add New Customer]

100 records per page, Filter: Distributor, Search:

	Logo	Name	Total Devices	Total Users	Assigned Distributor	Creation Date	Last Update Date	
<input type="checkbox"/>		Customer Account A	0	0	Distributor Account 1	09/01/2016 2:59:31 PM	09/14/2016 12:28:57 PM	Actions

Showing 1 to 1 of 1 entries

- 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

Users

Users: 2, User Types: 1, Total Sign Ins: 22, First User Created At: 09/01/2016, Last User Created At: 09/15/2016

Actions for Selected Users: [Add New User]

100 records per page, Edit Columns, Filter: Use Case, Customer Only, Search:

	Name	User Type	Creation Date	Last Update Date	Last Sign In Date	Distributor User?	
<input type="checkbox"/>	Brad Pool ENCADMIN	Admin	09/15/2016 4:32:31 PM	09/15/2016 4:32:39 PM	09/15/2016 4:32:39 PM	✓	Actions
<input type="checkbox"/>	Distributor User 1	Admin	09/01/2016 2:59:31 PM	09/21/2016 11:51:53 AM	09/21/2016 11:51:53 AM	✓	Actions

Showing 1 to 2 of 2 entries

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

The screenshot shows a web form titled "Add New User" with a close button in the top right corner. The form contains five input fields: "Name" with an asterisk, "E-mail Address" with an asterisk, "Phone Number", "User Type" with a dropdown arrow, and "Use Cases" with a dropdown arrow. The "User Type" dropdown is currently set to "Admin", and the "Use Cases" dropdown is set to "All Use Cases". At the bottom right of the form are two buttons: a red "Cancel" button with a close icon and a blue "+ Add User" button.

- 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

This screenshot shows the same "Add New User" form as Figure 5-5, but with the "User Type" dropdown menu open. The "Name" field contains "Customer User 04" and the "E-mail Address" field contains "aaaa@encoreentworks". The "User Type" dropdown menu is open, showing two options: "Admin" and "Viewer". The "Admin" option is highlighted with a checkmark. The "Use Cases" dropdown remains set to "All Use Cases". The "Cancel" and "+ Add User" buttons are still at the bottom right.

- 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

Add New User

Name * Customer User 04

E-mail Address * aaaa@encoreentworks

Phone Number

User Type Admin

Use Cases All Use Cases

Use Case Alpha

Cancel Add User

- 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

Users

Users: 2, User Types: 1, Total Sign Ins: 22, First User Created At: 09/01/2016, Last User Created At: 09/21/2016

Actions for Selected Users: + Add New User

100 records per page, Edit Columns, Filter, Use Ca: Customer Only, Search:

	Name	User Type	Creation Date	Last Update Date	Last Sign In Date	Distributor User?	
<input type="checkbox"/>	Customer User 04	Admin	09/21/2016 11:56:11 AM	09/21/2016 11:56:11 AM	-	✗	Actions -
<input type="checkbox"/>	Brad Pool ENCADMIN	Admin	09/15/2016 4:32:31 PM	09/15/2016 4:32:39 PM	09/15/2016 4:32:39 PM	✓	Actions -
<input type="checkbox"/>	Distributor User 1	Admin	09/01/2016 2:59:31 PM	09/21/2016 11:51:53 AM	09/21/2016 11:51:53 AM	✓	Actions -

Showing 1 to 3 of 3 entries

« First < Previous 1 Next > Last »

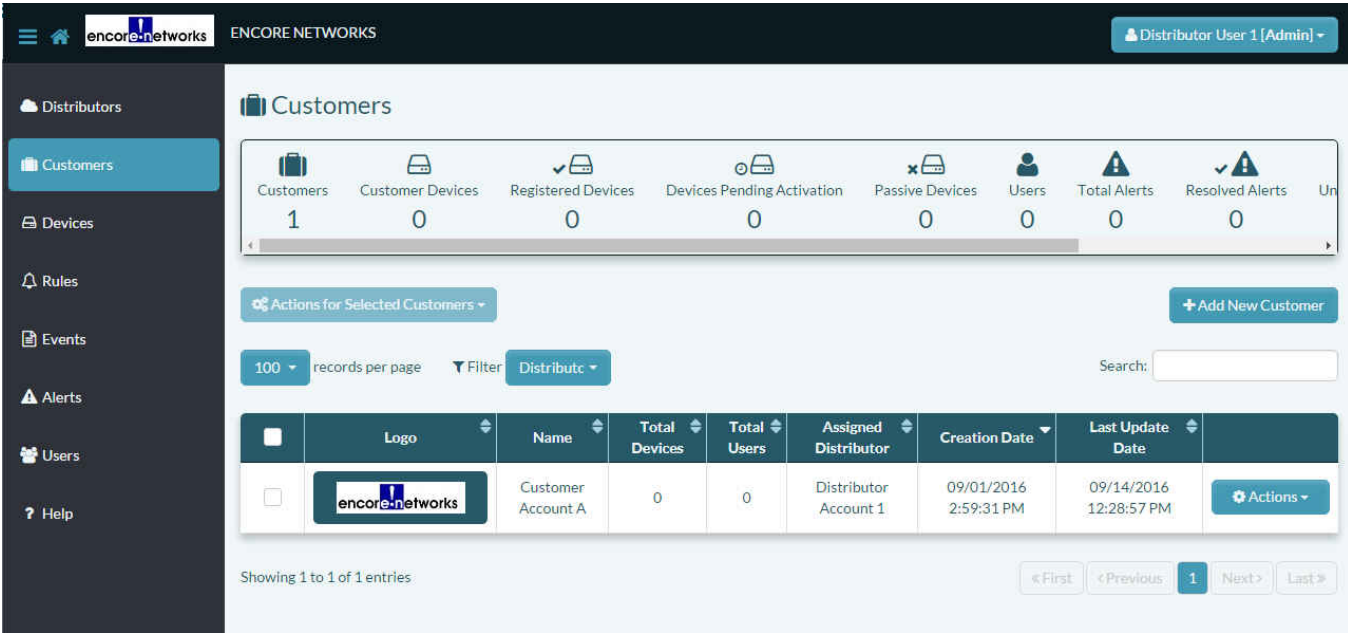
5.1.3 Customer Contacts

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).

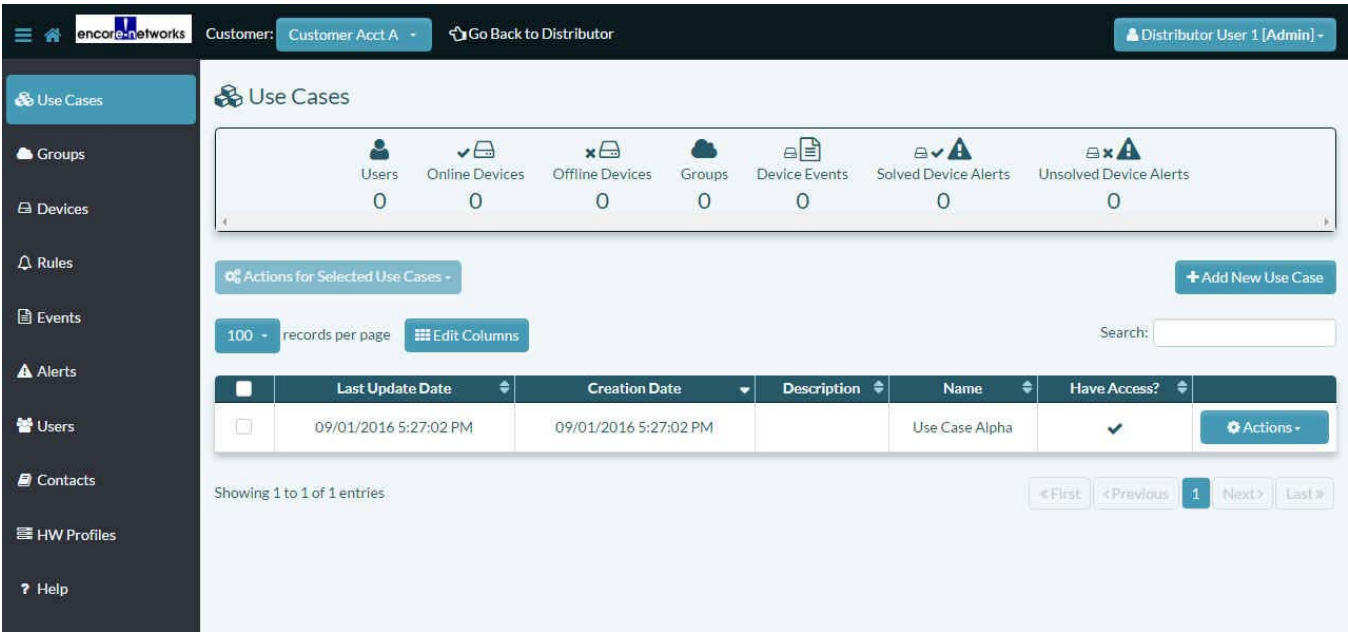
» The distributor's Table of Customer Accounts is displayed ([Figure 5-9](#)).

Figure 5-9. Table of Customer Accounts



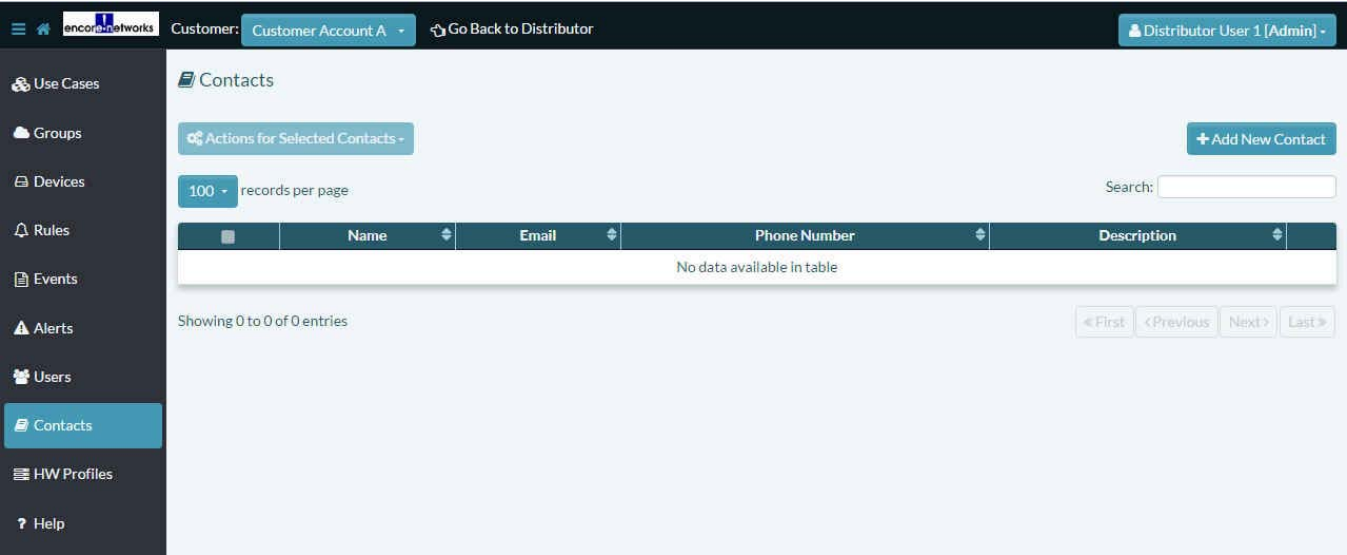
- 3 Select a customer in the table.
 - » The customer's Table of Use Cases is displayed (Figure 5-10).

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 Contacts



- 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

This is a modal window titled 'Add New Contact'. It contains two text input fields: 'Name' and 'Description'. Below these are two checkboxes: 'E-mail Address' and 'Phone Number'. At the bottom right, there are two buttons: a red 'Cancel' button and a blue '+ Add Contact' button.

- 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

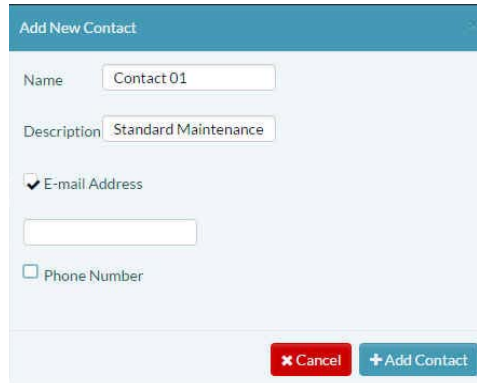
This is the same 'Add New Contact' modal window as in Figure 5-12, but now it contains data. The 'Name' input field is filled with the text 'Contact 01' and the 'Description' input field is filled with the text 'Standard Maintenance'. The 'E-mail Address' and 'Phone Number' checkboxes remain unchecked. The 'Cancel' and '+ Add Contact' buttons are still present at the bottom.

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.

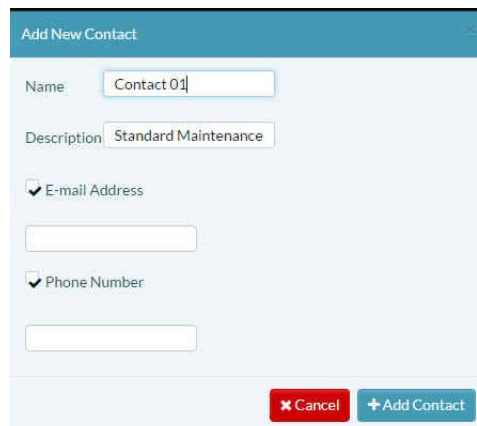
Figure 5-14. Panel to Add a Customer Contact: Email Address

The screenshot shows a web interface titled "Add New Contact" with a close button in the top right. It contains two text input fields: "Name" with the value "Contact 01" and "Description" with the value "Standard Maintenance". Below these are two checkboxes. The "E-mail Address" checkbox is checked, and its corresponding text input field is active. The "Phone Number" checkbox is unchecked. At the bottom right are two buttons: a red "Cancel" button and a blue "Add Contact" button.

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.

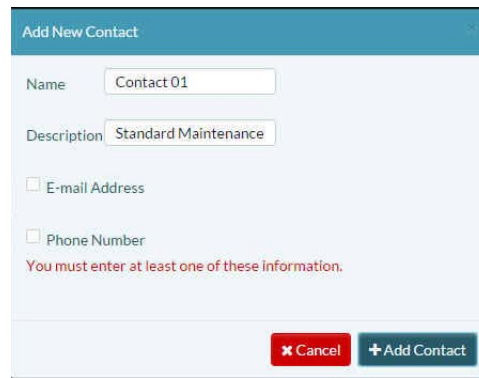
Figure 5-15. Panel to Add a Customer Contact: Telephone Number

The screenshot shows the same "Add New Contact" panel as Figure 5-14. In this state, the "E-mail Address" checkbox is still checked, but the "Phone Number" checkbox is now checked, and its corresponding text input field is active. The "Name" and "Description" fields remain unchanged. The "Cancel" and "Add Contact" buttons are still at the bottom right.

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

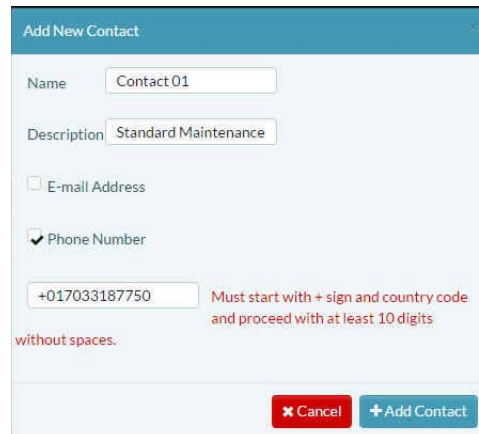


The screenshot shows a web form titled "Add New Contact". It has two text input fields: "Name" with the value "Contact 01" and "Description" with the value "Standard Maintenance". Below these are two checkboxes: "E-mail Address" and "Phone Number", both of which are unchecked. A red error message states: "You must enter at least one of these information." At the bottom right, there are two buttons: a red "Cancel" button and a blue "+ Add Contact" button.

- 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.

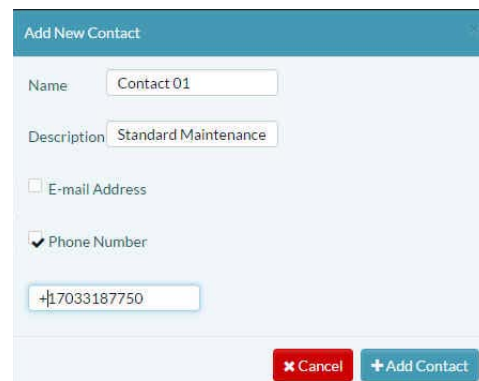
Figure 5-17. Panel to Add a Customer Contact: Use Correct Format for Telephone Number



The screenshot shows the "Add New Contact" form. The "Name" field is "Contact 01" and the "Description" field is "Standard Maintenance". The "E-mail Address" checkbox is unchecked, and the "Phone Number" checkbox is checked. Below the "Phone Number" checkbox is a text input field containing "+017033187750". A red error message is displayed: "Must start with + sign and country code and proceed with at least 10 digits without spaces." At the bottom right, there are "Cancel" and "+ Add Contact" buttons.

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

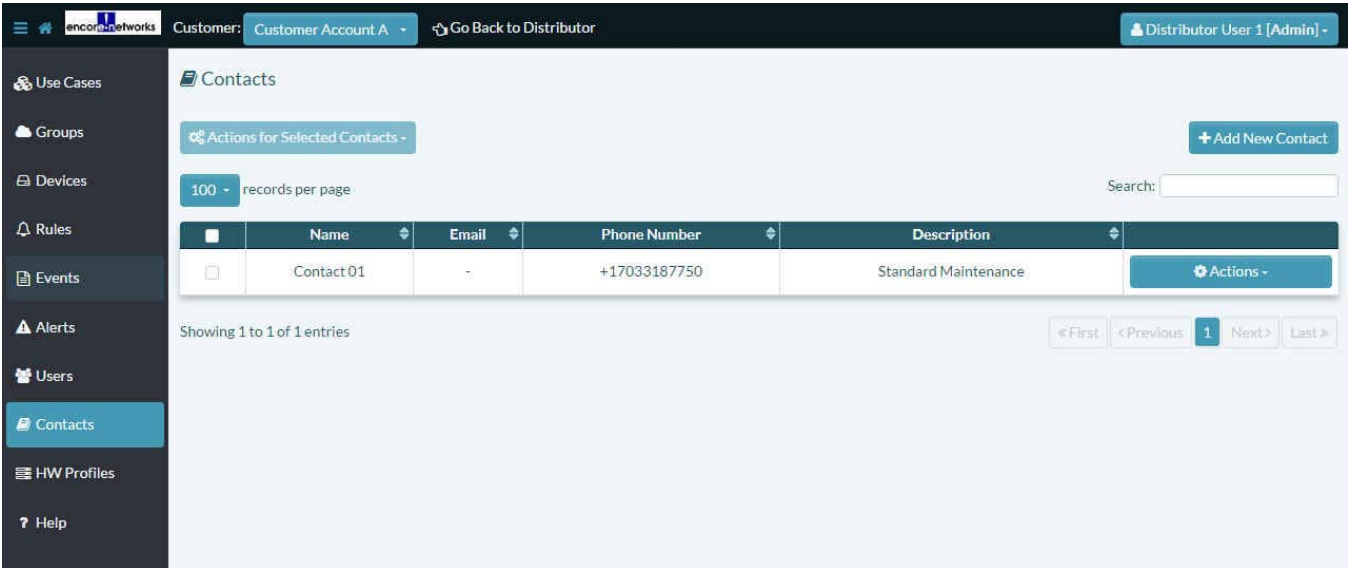
Figure 5-18. Panel to Add a Customer Contact: Corrected Telephone Number



The screenshot shows the "Add New Contact" form. The "Name" field is "Contact 01" and the "Description" field is "Standard Maintenance". The "E-mail Address" checkbox is unchecked, and the "Phone Number" checkbox is checked. Below the "Phone Number" checkbox is a text input field containing "+17033187750". At the bottom right, there are "Cancel" and "+ Add Contact" buttons.

- 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



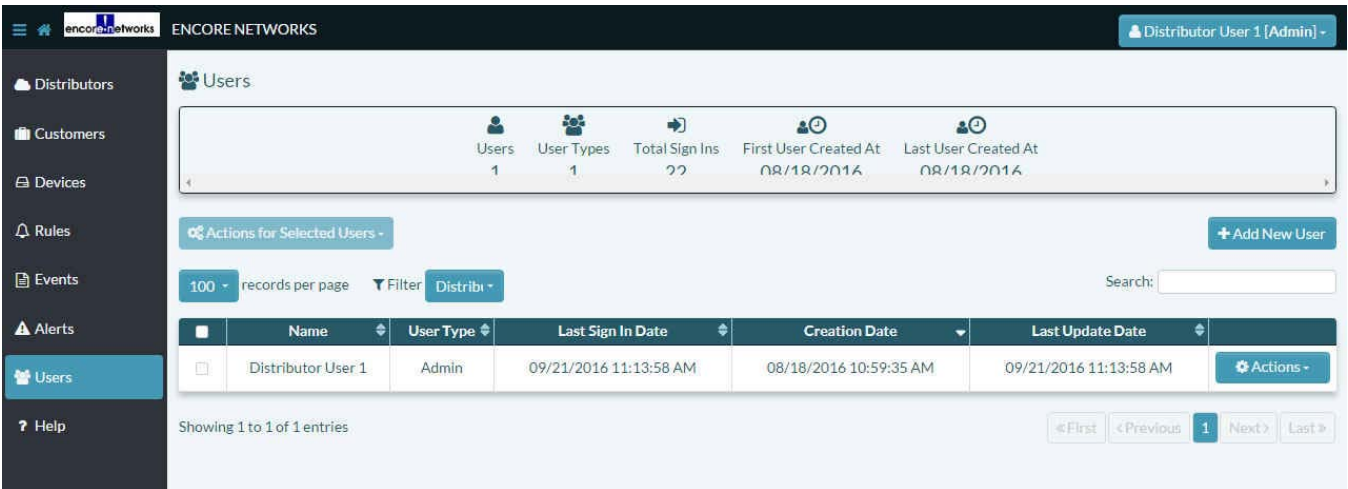
See [Section 5.1.5, Assigning a User or a Contact](#), on page 11.

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

Add New User

Name *

E-mail Address *

Phone Number

User Type * Admin

Distributors

Add: Distributor

Distributor Name	Distributor User Type	Has Access
No data available in table		

Access to Customers

Add: Customer

Customer Name	Customer User Type
No data available in table	

✕ Cancel + Add 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

The screenshot shows a web application window titled "Overview User". It contains the following elements:

- Name:** A text input field containing "Customer User 04".
- User Type:** A dropdown menu with "Admin" selected.
- Use Cases:** A table with one header row "Use Case Name" and one body row containing the text "No data available in table".
- Close Button:** A red button with a white "X" icon and the text "Close" in the bottom right corner.

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

The screenshot shows a web interface titled "Overview User" with a close button in the top right corner. The interface displays the following information:

- Name:** Distributor User 1
- User Type:** Admin
- Use Cases:** A table with the header "Use Case Name" and a message "No data available in table".

A red "Close" button is located at the bottom right of the panel.

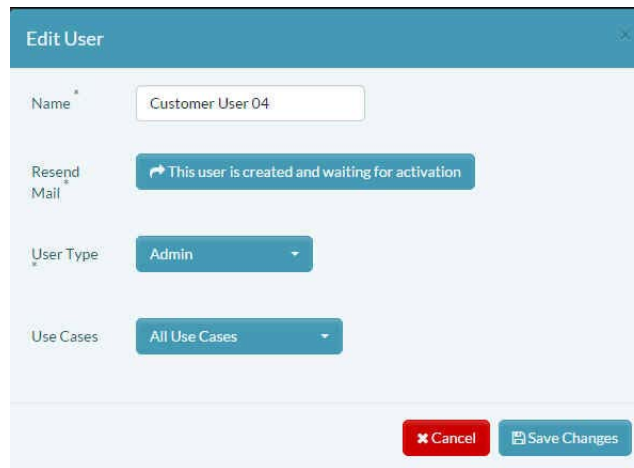
- 6 When you have finished reviewing the user's information, select the button to **Close** the panel.
 - » The Table of Users is redisplayed.

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

The image shows a web interface titled "Edit User" with a close button in the top right corner. It contains four input fields: "Name" with the value "Customer User 04", "Resend Mail" with a message "This user is created and waiting for activation", "User Type" with a dropdown menu showing "Admin", and "Use Cases" with a dropdown menu showing "All Use Cases". At the bottom right, there are two buttons: a red "Cancel" button and a blue "Save Changes" button.

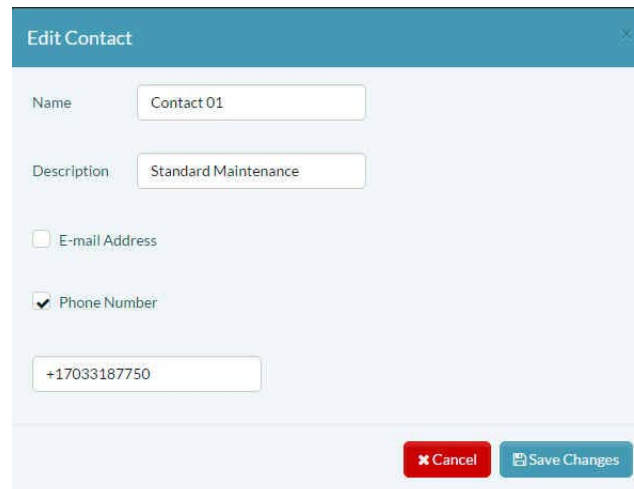
- 6 On this panel, revise settings for the customer user, as needed for account management.
- 7 When you have finished revising the user's setting, select the button to **Save Changes**.
 - » The customer account's Table of Users is redisplayed.

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

The screenshot shows a web interface titled "Overview User". It contains the following sections:

- Name:** A text field containing "Distributor User 1".
- User Type:** A dropdown menu showing "Admin".
- Distributor Assignments:** A table with the following data:

Distributor Name	Distributor User Type	Has Access
Distributor Account 1	Admin	For Edit
- Accessible Customers:** A table with the following data:

Customer Name	Customer User Type
Customer Account A	Admin
- Close Button:** A red button with a close icon and the text "Close" at the bottom right.

- 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

Edit User

Name *

Distributor User 4

User Type

Admin

Distributors

Add: Distributor

Distributor Name	Distributor User Type	Has Access	
Distributor Acct 4	Admin	For View	

Access to Customers

Add: Customer Acct 4

Customer Name	Customer User Type	
Customer Acct 4	Admin	

Cancel

Save Changes

- 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.

