

Developing Accounts

in the enCloud™ Management System

Encore Networks' cloud management system, enCloud™, provides management of connected Encore devices via a web portal. A web browser, tablet, or smartphone can allow access to enCloud from anywhere. The enCloud management system manages Encore Networks' EN-400™, EN-1000™, EN-2000™, EN-3000™, and EN-4000™ routers.

Note: For a quick basic configuration, without details, see the [QuickStart Guide for the enCloud™ and enSite™ Management Systems](#).

This document provides basic procedures to develop enCloud accounts. You can adapt the procedures to your customer plan. See the following discussions for information to set up your enCloud account:

- [Section 3.1, enCloud Account Levels](#), on page 1
- [Section 3.2, The Account Plan](#), on page 2
- [Section 3.3, Navigating through Accounts](#), on page 4
- [Section 3.4, The Tier 1 \(Value-Added Reseller\) Account](#), on page 5
- [Section 3.5, Tier 2 \(Customer\) Accounts](#), on page 10

See the [enCloud™ Management System Document Set](#) for a full list of documents with information to set up your enCloud account.

3.1 enCloud Account Levels

An enCloud account has the following levels (tiers). Users can be assigned to each tier.

- **Encore Administrator.** Your contact at Encore Networks, Inc., establishes your principal tier 1 account. That contact may also manage enCloud's display formats, and may monitor system processes and performance.
- **Tier 1 (Value-Added Reseller, VAR).** A tier 1 user can see all devices in the tier 1 account's inventory and can monitor (as a **Viewer**) or manage (as an **Administrator**) some or all entities in the tier 1 account, in the account's tier 2 customers, and in customers' tier 3 groups.

- **Tier 2 (Customer).** This is a specific customer's deployment. A tier 2 user with **Administrative** permission can modify some aspects of tier 3 groups and some aspects of rules.
- **Tier 3 (Group).** In each tier 2 account, a user can specify tier 3 groups. A tier 3 group can be a collection of devices that all serve the same function, or are located at the same site, or constitute a group in another way that the user defines.

A tier 1 user with **Administrator** permission and a tier 2 user with **Administrator** permission have the same capabilities, with different scopes.

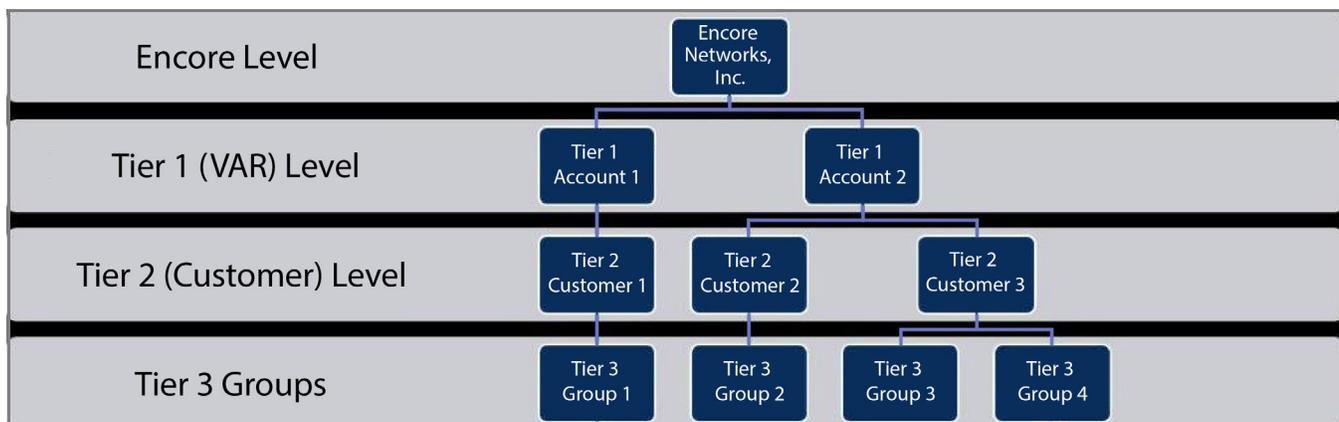
- For example, a tier 1 user can create, manage, modify, and delete all entities for which the user has been assigned administrator permission, in that user's tier 1 accounts, associated tier 2 customer accounts, and customers' tier 3 groups.
- A tier 2 user can create, manage, modify, and delete all entities for which the user has been assigned administrator permission, in that user's tier 2 customer accounts and tier 3 groups.

A user with **Viewer** permission can view (monitor) entities that the user has been assigned. A user with viewer permission cannot modify information.

Note: A user might have different permission levels for different entities in the same account—for example, a tier 1 user might have administrator permission for some tier 1 or tier 2 entities and viewer permission for other tier 1 or tier 2 entities.

Figure 3-1 illustrates enCloud levels.

Figure 3-1. enCloud Hierarchy



There is an additional way to group devices within a tier 2 account: A user can assign **Labels** to sort devices into other categories. Labels and tier 3 groups are unrelated.

3.2 The Account Plan

It is important to have a plan before you set up tier 2 accounts (customers). The plan does not need to be a formal chart—just a quick list or sketch of the customers within your tier 1 account, with notes about devices and functions, and a set of conditions to monitor.

Do all of the following to develop an account plan:

Establish a Tier 1 Account

- 1** Contact your Encore Networks representative, who will register your tier 1 account and will set up the principal tier 1 user that you designate for the account. (In this procedure, you are that tier 1 user.) For more information, see the document [Account Registration and Log-In](#).
- 2** Develop the tier 1 account. See [Section 3.4, The Tier 1 \(Value-Added Reseller\) Account](#), on page 5 of the current document.

Note: The remaining steps are in the recommended order for initial accounts. However, the steps do not have to occur in the order listed.

Create Tier 2 Accounts

- 3** Develop one or more tier 2 (customer) accounts. See [Section 3.5, Tier 2 \(Customer\) Accounts](#), on page 10 of the current document.
- 4** Then add one or more tier 3 groups to each customer account. See [Section 5.1, Tier 3 Groups](#), in the document [Tier 3 Groups and Labels](#).

Add Devices to the Tier 1 Account

Note: enCloud devices that you purchased directly from Encore Networks, Inc., were added to your tier 1 account at the time of purchase, so those devices show up in the tier 1 inventory.

Devices purchased from vendors other than Encore Networks., Inc., may take longer to appear in enCloud or may need to be added manually.

- 5** In enSite, all devices must be added to the tier 1 device inventory. In enCloud, devices can also be directly added to the tier 1 device inventory. See [Section 4.2, Adding Devices to the Tier 1 Account](#), in the document [Devices and Hardware Profiles](#).

Assign Devices to Tier 2 Accounts

- 6** Assign each device to a tier 2 customer account and to a tier 3 group in that customer account. See [Section 4.3, Viewing Devices in a Customer Account](#), in the document [Devices and Hardware Profiles](#).

Add Users for Tier 2 Accounts

- 7** Add tier 2 users to manage or monitor specific tier 2 accounts and associated tier 3 groups. See the document [Establishing Users and Contacts](#).

Develop Rules for Tier 2 Accounts

- 8** Add rules to monitor device conditions or to monitor user activities. See the document [Developing Rules](#).

Note: A rule tests a condition. When the condition is met, the rule lists an event. A rule can also send alerts and notifications to users, and it can send a task to a device.

3.3 Navigating through Accounts

The enCloud/enSite account navigation bar is near the top left of the screen, beside the logo. (Figure 3-2 displays the logo for Encore Networks, Inc.) If the navigation bar displays only the logo and the tier 1 account name, the system is at the tier 1 level.

Figure 3-2. Account Navigation Bar



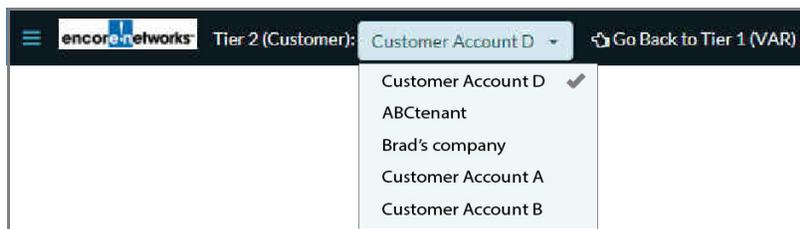
If the enCloud/enSite management system is at the tier 2 (customer) level, the highlighted frame indicates the tier 2 account currently displayed. (In Figure 3-3, the indicated account is **Customer Account D**.)

Figure 3-3. Navigation Bar for Tier 2 Customer



- 1 When you are in a tier 2 account, you might need to view a different tier 2 account or you might want to return to your tier 1 level. On the navigation bar, do one of the following:
 - a To view another tier 2 customer, select a customer in the navigation bar's dropdown list of tier 2 accounts (as shown in Figure 3-4).

Figure 3-4. Navigation between Accounts



or

- b To view the tier 1 account, select the button to **Go Back to Tier 1 (VAR)**.
 - » The navigation bar changes to indicate the new display, and one of the following is displayed:
 - If you selected a tier 2 customer, that customer's table of tier 3 groups is displayed.
 - If you selected the tier 1 account, the table of tier 1 accounts is displayed.

3.4 The Tier 1 (Value-Added Reseller) Account

Note: If you do not yet have an enCloud account, see the document [Account Registration and Log-In](#).

After you log into your enCloud tier 1 account, your initial screen is displayed (Figure 3-5).

Note: The Table of Tier 1 Accounts is the default initial screen for a tier 1 user. Most users will see only one tier 1 account in the table.

Figure 3-5. Table of Tier 1 Accounts

Logo	Name	Description	Creation Date	Last Update Date	Total Tier 2 (Customer)s	Total Users	Total Devices	Actions
	Distributor Account 1	-	08/18/2016 11:00:25 AM	06/26/2017 7:35:03 AM	4	2	19	Actions
	ABC (Encore Engineering)	Used for encore Engineering testing with enCloud	12/16/2015 2:09:00 PM	06/26/2017 7:34:57 AM	13	19	76	Actions

See the following:

- [Section 3.4.1, Managing the Tier 1 Account](#), on page 5
- [Section 3.4.2, Monitoring the Tier 1 Account](#), on page 9

3.4.1 Managing the Tier 1 Account

- 1 To manage a tier 1 account, navigate to the table of tier 1 accounts.
- 2 Select the **Actions** button at the end of the row for a tier 1 account that needs to be edited, and, in the button's dropdown list, select **Edit**.

» The Panel to Edit a Tier 1 Account is displayed (Figure 3-6).

Figure 3-6. Panel to Edit a Tier 1 Account

The screenshot shows the 'Edit Tier 1 (VAR)' panel with the following details:

- Name:** Distributor Account
- Description:** (Empty text field)
- Devices:**
 - Add: Device

Name	Device UID	
Bulkload 12	00A0EB456791	✖
Bulkload 13	00A0EB456790	✖
Bulkload 14	00A0EB654988	✖
- Users:**
 - Add: Users

Name	Account User Type	E-mail	Has Access	
Brad Demos	Admin	Hidden E-	For Edit	✖
Distributor User 1	Admin	Hidden E-	For Edit	✖

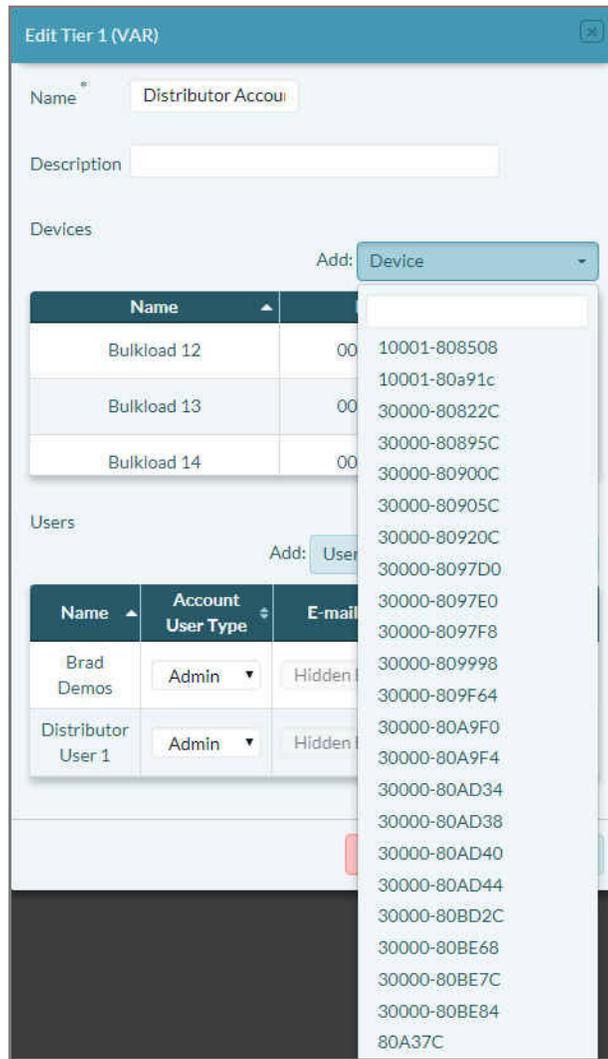
Buttons at the bottom: Cancel, Save Changes

3 Study the panel's list of **Devices**, list of **Users**, and list of **Customers** in the tier 1 account. Make changes as necessary.

Note: Some examples follow.

a To add a device, select the panel's **Device** field. On the field's dropdown menu, select a device to add to this account (Figure 3-7).

Figure 3-7. Selecting a Device in the Tier 1 Inventory to Add to this Tier 1 VAR Account



b Repeat step 3a for each device you wish to add to this account.

Figure 3-8. Device Added to this Tier 1 Account

The screenshot shows the 'Edit Tier 1 (VAR)' interface. At the top, the title bar reads 'Edit Tier 1 (VAR)'. Below the title bar, there are input fields for 'Name' (containing 'Distributor Account') and 'Description'. Under the 'Devices' section, there is an 'Add:' dropdown menu set to 'Device'. Below this is a table of devices:

Name	Device UID	
30000-80905C	00A0EB80905C	
Bulkload 12	00A0EB456791	
Bulkload 13	00A0EB456790	

Below the devices table, there is a 'Users' section with an 'Add:' dropdown menu set to 'Users'. Below this is a table of users:

Name	Account User Type	E-mail	Has Access	
Brad Demos	Admin	Hidden E-	For Edit	
Distributor User 1	Admin	Hidden E-	For Edit	

At the bottom of the interface, there are two buttons: a red 'Cancel' button and a blue 'Save Changes' button.

- c** You can add users to the panel's list of users, or you can edit permissions (Figure 3-9).

Figure 3-9. Editing User Access Level

The screenshot shows the 'Edit Tier 1 (VAR)' window. At the top, the 'Name' field contains 'Distributor Accou' and the 'Description' field is empty. Below this is a 'Devices' section with an 'Add: Device' dropdown. A table lists three devices:

Name	Device UID	Actions
30000-80905C	00A0EB80905C	[X]
Bulkload 12	00A0EB456791	[X]
Bulkload 13	00A0EB456790	[X]

Below the devices is a 'Users' section with an 'Add: Users' dropdown. A table lists two users:

Name	Account User Type	E-mail	Has Access	Actions
Brad Demos	Admin	Hidden E-	For Edit	[X]
Distributor User 1	Admin	Hidden E-	For Edit	[X]

The 'Has Access' dropdown for 'Distributor User 1' is open, showing options: 'For Edit' (selected), 'For View', and 'For Edit'. At the bottom, there are 'Cancel' and 'Save Changes' buttons.

Warning: Always leave your access level at **Edit**.

- d** When the account has been edited, select the button to **Save Changes**.
 » The changes are made, and the table of tier 1 accounts is redisplayed.

3.4.2 Monitoring the Tier 1 Account

- 1** To review a tier 1 account, navigate to the table of tier 1 accounts, and do one of the following:
 - a** Select a tier 1 account in the table.
or
 - b** At the right end of a tier 1 account's row, select the **Actions** button and, in the dropdown list, select **Overview**.

» In either case, the Overview Panel for a Tier 1 Account is displayed (Figure 3-10).

Figure 3-10. Overview Panel for a Tier 1 Account

Overview Tier 1 (VAR)

Name:

Description:

enCloud networks

Devices

Name	Device UID
Bulkload 17	00A0EB123800
Bulkload 16	00A0EB987646
Bulkload 15	00A0EB789655
Bulkload 14	00A0EB654988

Users

Name	User Type	Has Access
Distributor User 1	Admin	Can Edit

Customers

Name
Customer Acct A

Note: The panel overview provides a quick summary of the selected tier 1 account. (In Figure 3-10, there is a scroll bar to the right of the list of **Devices**.)

c When you have finished reviewing the tier 1 account, select the **Close** button in the lower right corner of the panel.

» The Table of Tier 1 Accounts is redisplayed.

3.5 Tier 2 (Customer) Accounts

1 To see the tier 2 accounts that are part of the tier 1 portfolio, open your tier 1 account. Then select **Tier 2** in the enCloud menu (along the left side of the screen).

» The tier 1 account's Table of Tier 2 Customer Accounts is displayed (Figure 3-11).

Figure 3-11. Table of Tier 2 Customer Accounts: (Partial Display)

The screenshot shows the 'Tier 2 (Customer)' management interface. At the top, there are summary statistics:

- Tier 2 (Customer)s: 17
- Tier 2 (Customer) Devices: 71
- Passive Device Count: 11
- Registered Devices: 31
- Devices Pending Activation: 16
- Tier 3 (Group)s: 20

Below the summary is a table of Tier 2 Customer Accounts. The table has the following columns: Logo, Name, Domain, Total Devices, Total Users, Total Alerts, Assigned Tier 1 (VAR), Creation Date, Last Update Date, Total Tier 3 (Groups), and Actions.

Logo	Name	Domain	Total Devices	Total Users	Total Alerts	Assigned Tier 1 (VAR)	Creation Date	Last Update Date	Total Tier 3 (Groups)	Actions
	Brad's Company 2 (inactive)		12	0	0	ABC (Encore Engineering)	06/08/2018 3:31:14 PM	06/08/2018 3:31:14 PM	1	Actions
	test for berk2		1	0	0	ABC (Encore Engineering)	04/16/2018 11:01:02 AM	04/16/2018 11:01:02 AM	1	Actions
	test for berk		2	0	0	ABC (Encore Engineering)	04/16/2018 10:54:37 AM	04/16/2018 10:54:37 AM	2	Actions
	test		1	0	0	ABC (Encore Engineering)	03/22/2018 9:40:52 AM	03/22/2018 9:40:52 AM	0	Actions
	New Customer		2	1	0	ABC (Encore Engineering)	09/22/2017 4:23:57 PM	09/22/2017 4:23:57 PM	1	Actions
	Suman's Engineering Section		1	0	0	ABC (Encore Engineering)	09/18/2017 10:09:15 AM	09/18/2017 10:09:15 AM	1	Actions
	NEw customer 1		0	0	0	ABC (Encore Engineering)	08/17/2017 1:21:24 PM	08/17/2017 1:21:24 PM	1	Actions
	Customer Account D		1	0	0	Distributor Account 1	06/05/2017 12:55:03 PM	06/05/2017 12:55:03 PM	1	Actions
	Video Demo Customer		0	0	0	ABC (Encore Engineering)	05/19/2017 3:16:31 PM	05/19/2017 3:16:31 PM	1	Actions

Note: If you have not yet added tier 2 accounts to the tier 1 account, the table of tier 2 customer accounts will be empty.

- To add a tier 2 account, select the button to **Add New Tier 2 Customer** (above the right side of the table).

» The Panel to Add a Tier 2 Account is displayed (Figure 3-12).

Figure 3-12. Panel to Add a Tier 2 Account

3 In the **Name** field, type the tier 2 customer name.

4 Do one of the following to designate a **Logo**:

a If you don't have a logo, select **Default**.

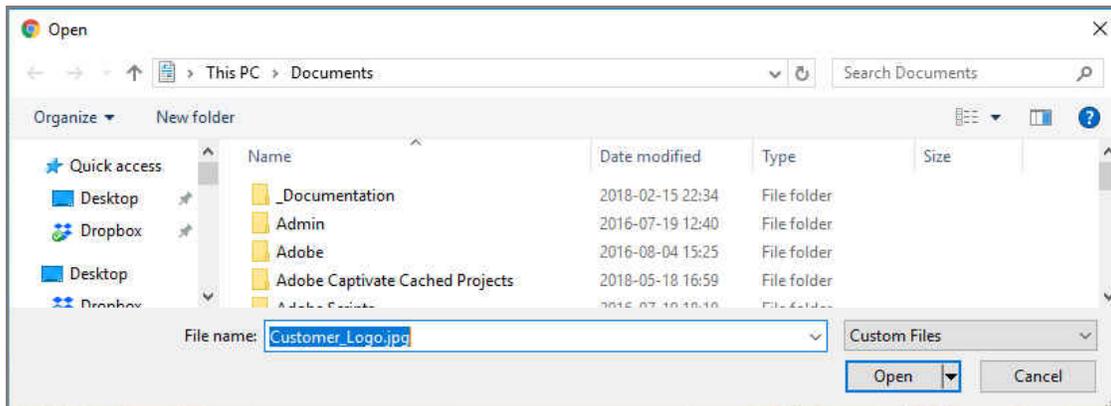
» The default logo (the logo for Encore Networks, Inc.) will be displayed for the tier 2 account. Go to [step 6](#).

b If you want the enCloud/enSite screens to display a company logo for this tier 2 customer, select the checkbox for **Upload a Custom Logo**, and select the **Browse** icon.

» A directory on your computer opens, to select files.

- 5 Navigate to the directory that holds the logo file, and select that file (as shown in Figure 3-13).

Figure 3-13. Selecting a Custom Logo



- » The selected logo is placed into the upper left corner of your enCloud/enSite screens.
- 6 In the panel's **Tier 1 (VAR)** field, select the tier 1 account that this tier 2 account belongs to.

Note: This field's value defaults to the tier 1 account that holds this tier 2 customer (as shown in [Figure 3-14](#)).

Figure 3-14. Panel to Add a Tier 2 Account: Select Tier 1 Account

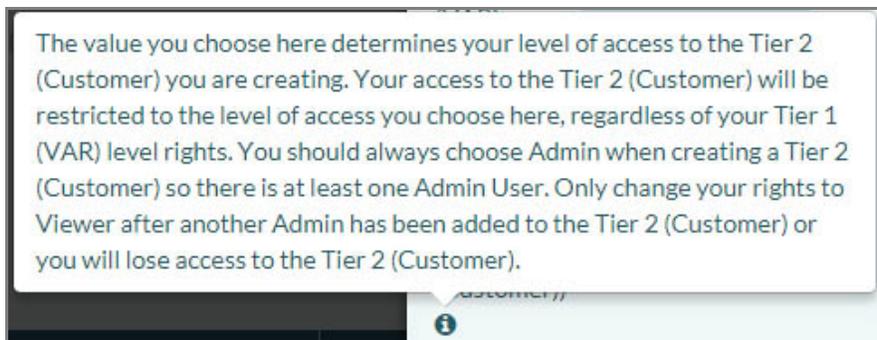
The screenshot shows a web form titled "Add New Tier 2 (Customer)". It contains the following elements:

- Name ***: A text input field.
- Logo**: Radio buttons for "Default" (selected) and "Upload a Custom Logo*", with a "Browse ..." button below.
- Tier 1 (VAR)**: A dropdown menu showing "ABC (Encore Eng" with a downward arrow.
- Your User Type (for this Tier 2 (Customer))**: A dropdown menu with options "ABC (Encore Engineering)" (checked) and "Distributor Account 1".
- Support Info**: A section with instructions: "Enter Tier 1 (VAR) support information below. This should be the information that the new Tier 2 (Customer) should use to contact the Tier 1 (VAR)." It includes input fields for "E-mail", "Phone", and "Address".
- Buttons**: "Cancel" (red) and "Add Tier 2 (Customer)" (blue) at the bottom right.

7 Do all of the following:

- a** The panel's field for **Your User Type for this Customer** has an Info Button (i). Click on the button to read the info bubble (information balloon, [Figure 3-15](#)).

Figure 3-15. Info Bubble



b In the field **Your User Type for this Tier 2 Account**, give yourself **Admin** permission (Figure 3-16).

Figure 3-16. Panel to Add a Tier 2 Account: Set Your Own User Permission for the Tier 2 Account

The screenshot shows a web form titled "Add New Tier 2 (Customer)". The form has several sections:

- Name:** A text input field with an asterisk indicating it is required.
- Logo:** Two radio buttons: "Default" (selected) and "Upload a Custom Logo*" (unselected). Below is a "Browse ..." button.
- Tier 1 (VAR):** A dropdown menu showing "ABC (Encore Eng)".
- Your User Type (for this Tier 2 (Customer)):** A dropdown menu with "Admin" selected and a checkmark. An option "Viewer" is also visible below it.
- Support Info:** A section with a heading and a note: "Enter Tier 1 (VAR) support information below. This should be the information that the new Tier 2 (Customer) should use to contact the Tier 1 (VAR)." It contains three text input fields for "E-mail", "Phone", and "Address".

At the bottom of the form are two buttons: a red "Cancel" button and a blue "+ Add Tier 2 (Customer)" button.

Warning: Always make your permission **Admin**, so that you can manage the tier 2 account. At least one tier 1 user must have administrator access to the tier 2 account. Do not set your permission to **Viewer** until after you have assigned another tier 1 user **Admin** permission to manage the tier 2 account.

- 8** For the benefit of users assigned to this tier 2 customer account, add the tier 1 user's support information:
 - **E-mail address**
 - **Telephone number**
 - **Street address**
- 9** When you have finished setting up the customer account, select the button to **Add Tier 2 Account**.
 - » The tier 2 account account is added to the Table of Tier 2 Accounts.

3.5.1 Developing the Tier 2 Customer Account

After you have created a tier 2 customer account, you can develop it further:

- Develop tier 3 groups and labels. See the document [Tier 3 Groups and Labels](#).
- Assign devices. See the document [Devices and Hardware Profiles](#).
- Add users and contacts. See the document [Establishing Users and Contacts](#).
- Develop rules (events, alerts, notifications, device tasks). See the document [Developing Rules](#).

Also see the following:

- [Section 3.5.1.1, Managing a Tier 2 Account](#), on page 16
- [Section 3.5.1.2, Monitoring a Tier 2 Account](#), on page 18

3.5.1.1 Managing a Tier 2 Account

- 1 Navigate to the tier 2 account ([Figure 3-17](#)).

Figure 3-17. Table of Tier 2 Accounts: (Partial Display)

	Logo	Name	Domain	Total Devices	Total Users	Total Alerts	Assigned Tier 1 (VAR)	Creation Date	Last Update Date	Total Tier 3 (Group)s	Actions
<input type="checkbox"/>		Brad's Company 2 (Inactive)		12	0	0	ABC (Encore Engineering)	06/08/2018 3:31:14 PM	06/08/2018 3:31:14 PM	1	Actions
<input type="checkbox"/>		test for berk2		1	0	0	ABC (Encore Engineering)	04/16/2018 11:01:02 AM	04/16/2018 11:01:02 AM	1	Actions
<input type="checkbox"/>		test for berk		2	0	0	ABC (Encore Engineering)	04/16/2018 10:54:37 AM	04/16/2018 10:54:37 AM	2	Actions
<input type="checkbox"/>		test		1	0	0	ABC (Encore Engineering)	03/22/2018 9:40:52 AM	03/22/2018 9:40:52 AM	0	Actions

- 2 Select the **Actions** button at the end of the row for a tier 2 account that needs to reflect some changes, and, in the dropdown list, select **Edit** ([Figure 3-18](#)).

Figure 3-18. Actions Dropdown List for a Tier 2 Account



» The Panel to Edit a Tier 2 Customer Account is displayed (Figure 3-19).

Figure 3-19. Panel to Edit a Tier 2 Customer Account

- 3 Edit items as needed for the account.
- 4 When the account has been edited, select the button to **Save Changes**.
 - » The Table of Tier 2 Accounts is redisplayed.

3.5.1.2 Monitoring a Tier 2 Account

- 1 Navigate to the Table of Tier 2 Accounts (Figure 3-20).

Figure 3-20. Table of Tier 2 Accounts: (Partial Display)

	Logo	Name	Domain	Total Devices	Total Users	Total Alerts	Assigned Tier 1 (VAR)	Creation Date	Last Update Date	Total Tier 3 (Groups)	
<input type="checkbox"/>		Brad's Company 2 (Inactive)		12	0	0	ABC (Encore Engineering)	06/08/2018 3:31:14 PM	06/08/2018 3:31:14 PM	1	Actions
<input type="checkbox"/>		test for berk2		1	0	0	ABC (Encore Engineering)	04/16/2018 11:01:02 AM	04/16/2018 11:01:02 AM	1	Actions
<input type="checkbox"/>		test for berk		2	0	0	ABC (Encore Engineering)	04/16/2018 10:54:37 AM	04/16/2018 10:54:37 AM	2	Actions
<input type="checkbox"/>		test		1	0	0	ABC (Encore Engineering)	03/22/2018 9:40:52 AM	03/22/2018 9:40:52 AM	0	Actions

- 2 At the right end of a tier 2 account's row, select the **Actions** button and, in the dropdown list, select **Overview** (Figure 3-21).

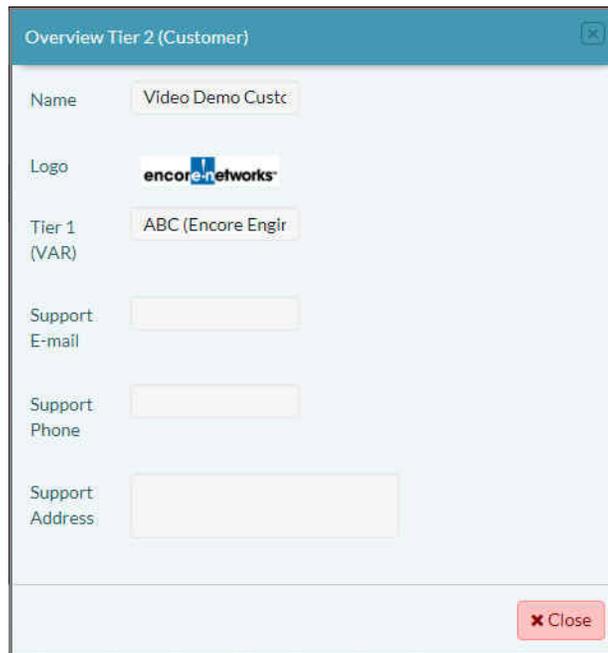
Figure 3-21. Actions Dropdown List for a Tier 2 Account



» The Overview Panel for a Tier 2 Account is displayed (Figure 3-22).

Note: The panel provides a quick summary of the selected customer account.

Figure 3-22. Overview Panel for a Tier 2 Account



Overview Tier 2 (Customer)

Name: Video Demo Custc

Logo: 

Tier 1 (VAR): ABC (Encore Engir

Support: E-mail:

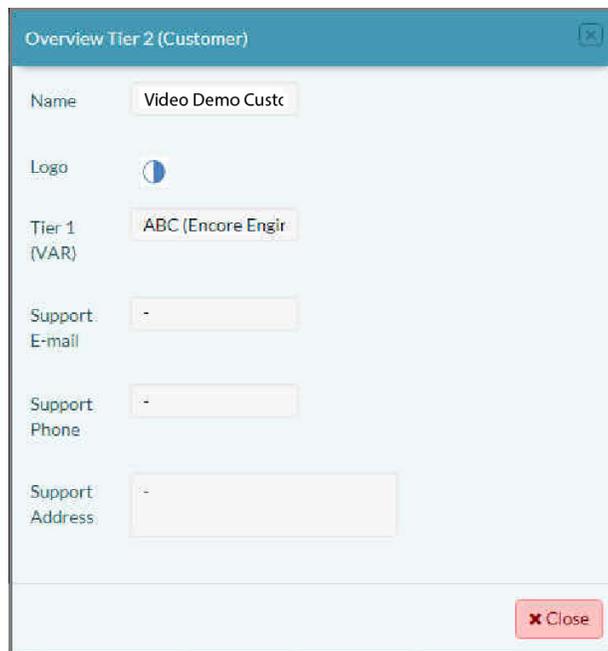
Support: Phone:

Support: Address:

Close

- 3 If you need to change some information—for example, to add a logo—make the changes.

Figure 3-23. Overview Panel for a Tier 2 Account: New Logo



Overview Tier 2 (Customer)

Name: Video Demo Custc

Logo: 

Tier 1 (VAR): ABC (Encore Engir

Support: E-mail:

Support: Phone:

Support: Address:

Close

- 4 When you have finished reviewing the customer account, select the panel's **Close** button.
 - » The Table of Tier 2 Accounts is redisplayed.