WEB ADMINISTRATOR CUSTOMER GUIDE

VERSION: 3.0

Tuesday, 9 November 2010

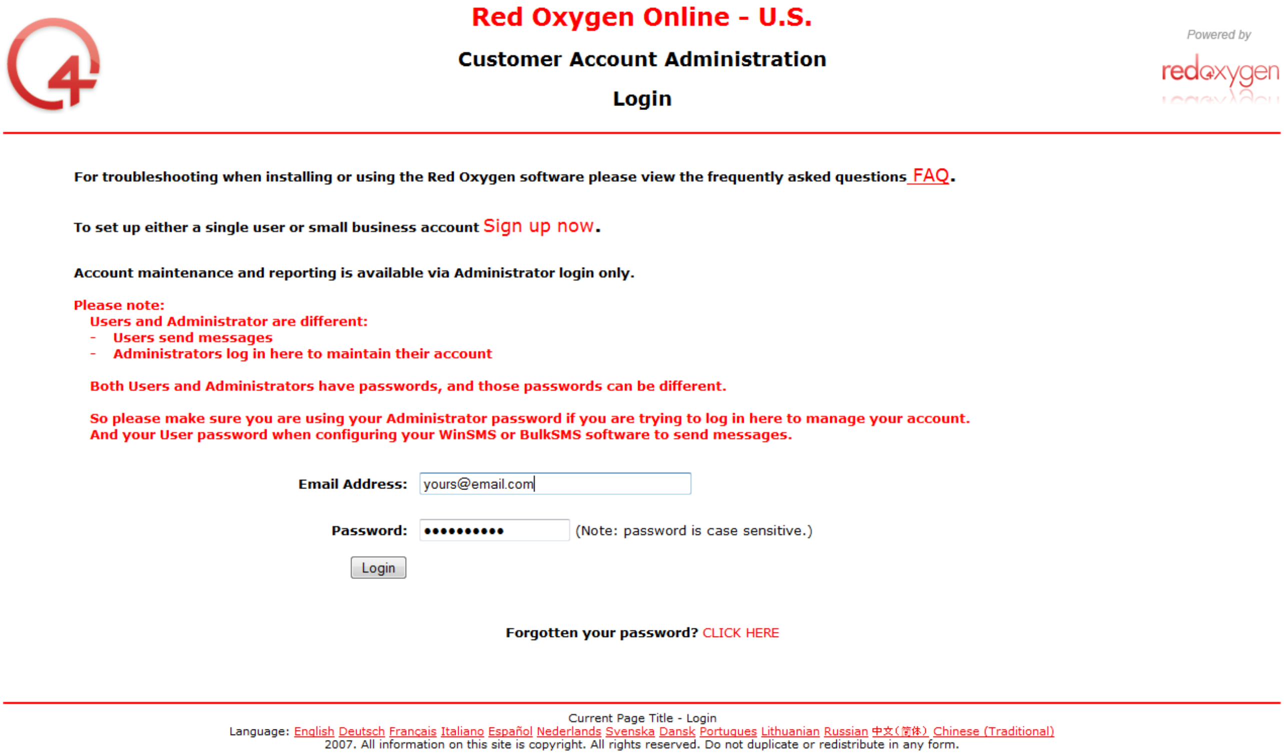
REVISION TABLE

VERSION	PRIMARY AUTHOR(S)	DESCRIPTION OF VERSION	DATE COMPLETED
1.0	Chris Garibaldi	New document created under new web administrator document format.	8/12/2003
2.0	Bart Ritchie	Updated documentation to reflect current Web Administrator features and workflow.	22/06/2006
3.0	Marilyn Guo	Updated and added pictures into this documentation to reflect current Web Administrator features and workflow.	9/11/2010

Contents

1. INTRODUCTION

1.1 DOCUMENT OVERVIEW


Red Oxygen Online - U.S.

Customer Account Administration

Login

Powered by redoxygen

For troubleshooting when installing or using the Red Oxygen software please view the frequently asked questions FAQ.

To set up either a single user or small business account Sign up now.

Account maintenance and reporting is available via Administrator login only.

Please note:
Users and Administrator are different:
- Users send messages
- Administrators log in here to maintain their account

Both Users and Administrators have passwords, and those passwords can be different.

So please make sure you are using your Administrator password if you are trying to log in here to manage your account.
And your User password when configuring your WinSMS or BulkSMS software to send messages.

Email Address: yours@email.com

Password: •••••••••• (Note: password is case sensitive.)

Login

Forgotten your password? CLICK HERE

Current Page Title - Login
Language: English Deutsch Français Italiano Español Nederlands Svenska Dansk Portugues Lithuanian Russian 中文(简体) Chinese (Traditional)
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The Web Administrator Customer Guide (WACG) is aimed at the three Customer Administrator groups and their levels of access, including Full Administrators, Accounting and Reporting, and Help Desk Operators. The WACG will be used as both an education tool and a reference document, focussing primarily on common tasks that Administrators will undertake rather than providing a description of everything that is visible on each page.

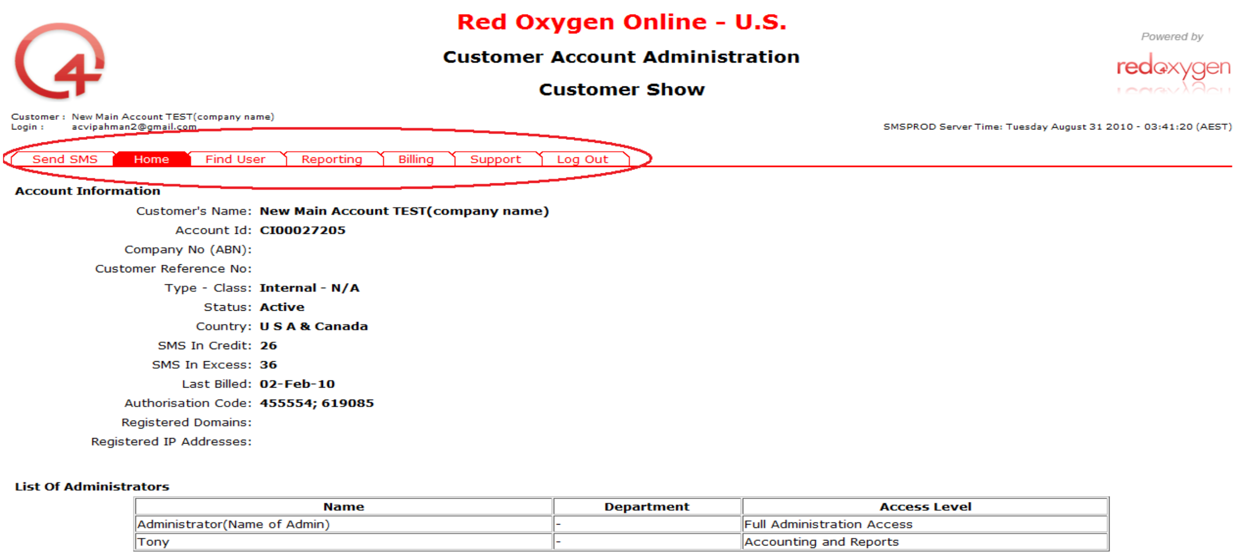
Administration of the customer account and individual user accounts are the primary interests of Customer Administrators using the Web Administrator tool.

This version of the WACG aims to provide this information in a simpler, tabular format, so that the reader does not need to wade through paragraphs of descriptive text. The reader should be able to locate the task that they require information on, and find it easily within the table. The table will also include three columns to indicate which levels of administrator have access to any particular listed task. The key to these columns is as follows:

- A = Full Administrator
- B = Accounting & Reporting
- C = Help Desk Operator

2. WEB ADMINISTRATOR TASK GUIDE

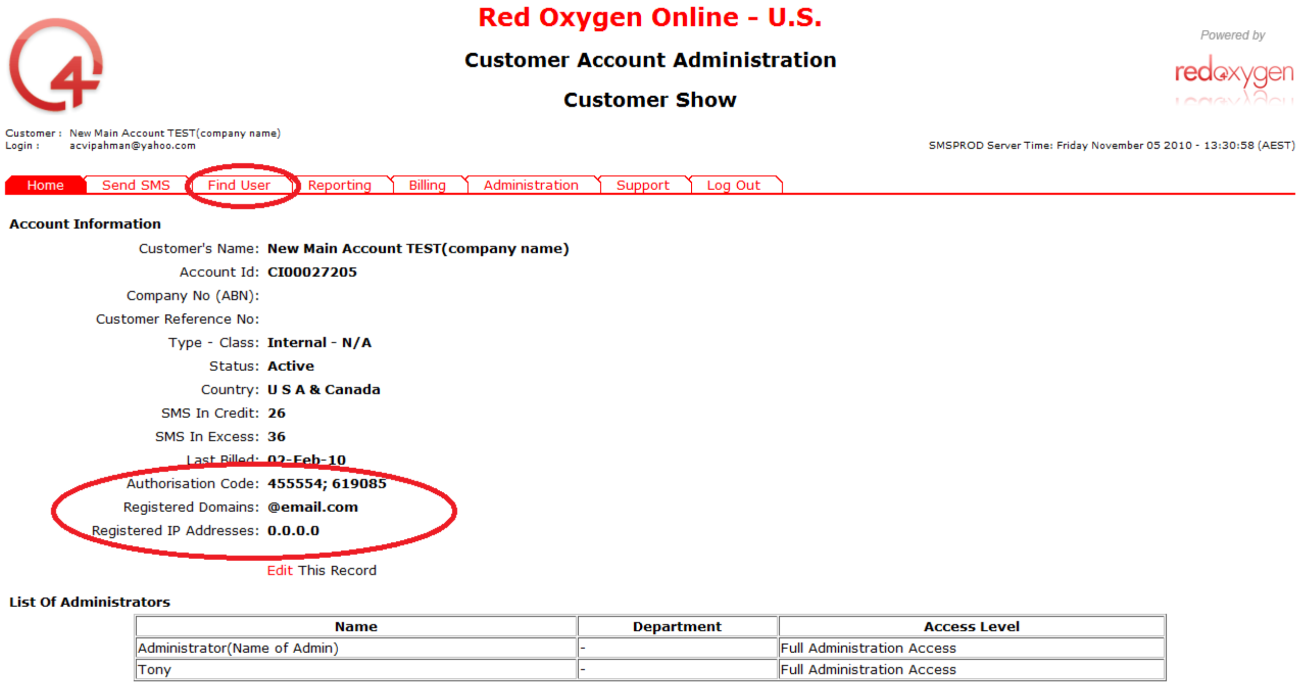
2.1 NAVIGATION



This section details tasks related to moving around within the Web Administration interface. It introduces the factors involved in navigating around your customer account. All administrators should read this document before using the Web Administrator.

TASK	ADMIN			EXPLANATION
	A	B	C	
2.1.1 Logging in	•	•	•	The Web Administrator login page is located at http://www.redoxygen.net and logging in requires your registered email address as a username and your password.
2.1.2 Navigating within one web session	•	•	•	The Web Administrator only supports one web session at a time. You cannot log in more than once, and you cannot select the browser option, “Open in New Page,” when clicking on a link within the Web Administrator. If you do, you may eventually be told that your session is stale or even receive errors when trying to open a new page. You will then need to login again to refresh your session.
2.1.3 Changing the Time Period of Displayed Data	•	•	•	This is particularly relevant to the *Reporting* and *Billing* tabs, where reports are displayed on screen. You are often allowed to select the timeframe you wish to view, the default being “since yesterday”. This selection can be made at the top of most reporting and billing pages, by means of a drop down box.
2.1.4 Logging Out	•	•	•	You can log out of the Web Administrator at any time, by clicking the *Log Out* tab. This will bring you back to the initial login page.

2.2 CUSTOMER ACCOUNT MANAGEMENT

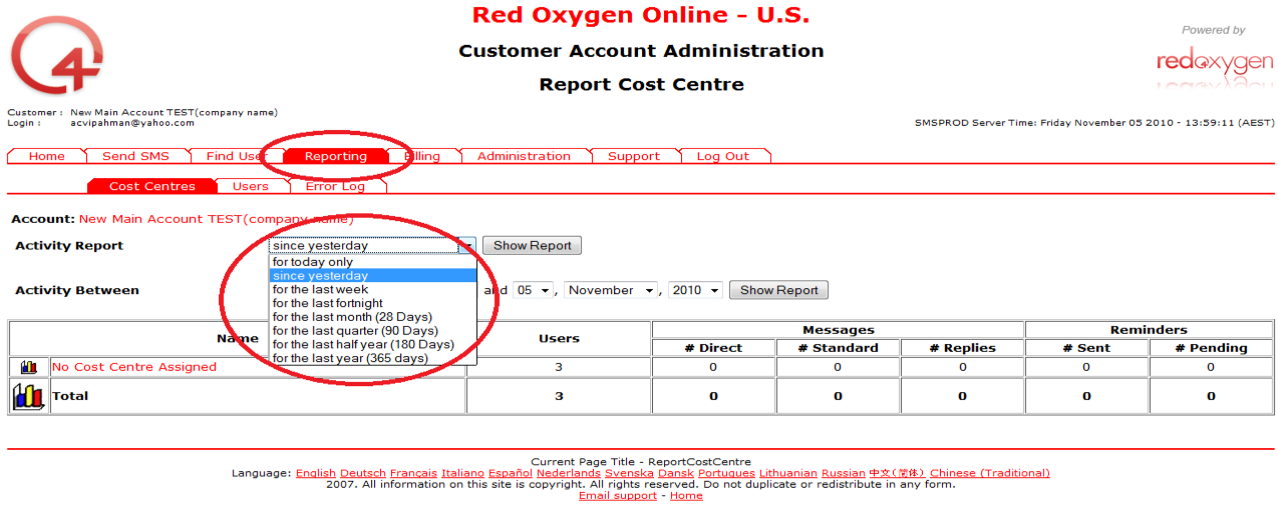


The Web Administration is used to manage customer accounts, both trial and paid corporate accounts. This section will deal with the tasks that are associated with the management of customer accounts.

TASK	ADMIN			EXPLANATION
	A	B	C	
2.2.1 Finding a User	•	•	•	Click on the *Find User* tab. Enter the user's email address, name, or mobile number and click submit. On the results page, find the user you wish to view, and click on that user's name.
2.2.2 Adding or Deleting a Domain				Customers cannot add or delete domains by themselves. In order to have a new domain added or an existing domain deleted, please contact your reseller or Red Oxygen Support.
2.2.3 Adding or Deleting an IP Address				Customers cannot add or delete IPs by themselves. In order to have a new IP added or an existing IP deleted, please contact your reseller or Red Oxygen Support.
2.2.4 Adding or Deleting an Authorisation Code				Customers cannot add or delete authorisation codes by themselves. In order to have a new IP added or an existing IP deleted, please contact your reseller or Red Oxygen Support.
2.2.5 Activating or Deactivating Active Creation				When Active Creation is turned on, a new user sending from a registered domain, with the correct authorisation code, will have their account automatically created when they send their first SMS message or reminder. If Active Creation is turned off, each user account will need to be manually created by the customer

				Administrators. Customers cannot active or deactivate Active Creation by themselves. In order to activate or deactivate Active Creation, please contact your reseller or Red Oxygen Support.
2.2.6 Cancelling Your Account				Please contact your reseller's sales team or Red Oxygen Sales.

2.3 REPORTING

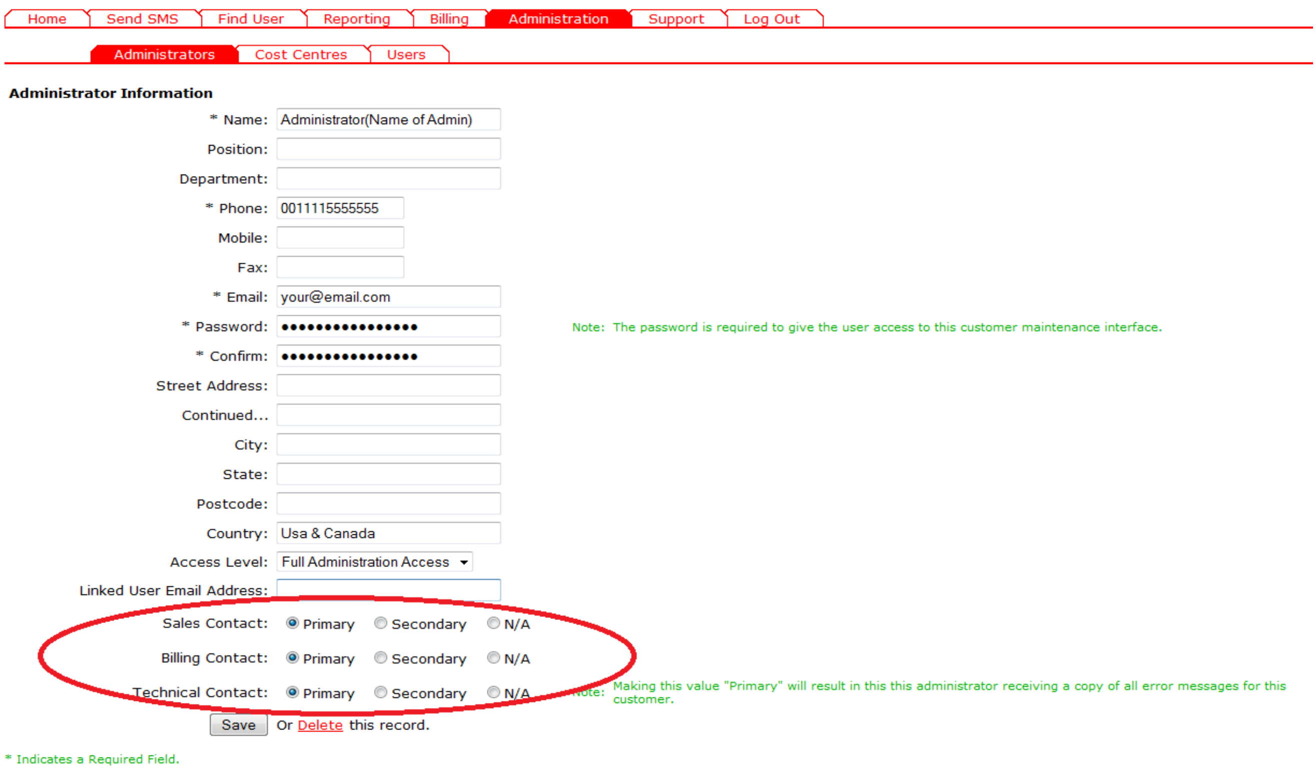


Reporting is one of the most useful features of the Web Administrator. All reporting can be found under the Reporting tab. Most reports are self-explanatory, and as such, this section will not deal with explaining the views in detail themselves, but more on how to find them and their basic function. Reports are mostly all focussed on usage, but are then broken down into different reports on usage, for example, by status, cost centre, or user.

TASK	ADMIN			EXPLANATION
	A	B	C	
2.3.1 Understanding Message Types in Reports	•	•	•	In reports based on message usage, the messages are broken down into the following categories: ▪ Direct messages (messages sent via API) ▪ Standard messages ▪ Replies ▪ Sent Reminders ▪ Pending Reminders
2.3.2 Changing the Time Period for Report Data	•	•	•	Please see section 2.1.3 for more information regarding time periods.
2.3.3 Report Usage by Cost Centre	•	•	•	The Cost Centres sub-tab will produce a report on usage based of the cost centres which have been set up within that customer account. Cost centres are created by customers in order to categorise their users, typically by department or group.
2.3.4 Report Usage by User	•	•	•	The Users sub-tab will produce a report on usage, based on the users who are registered within your account. This is one of the most common reports used, for both administration and support.

2.4 ADMINISTRATORS & ADMINISTRATION

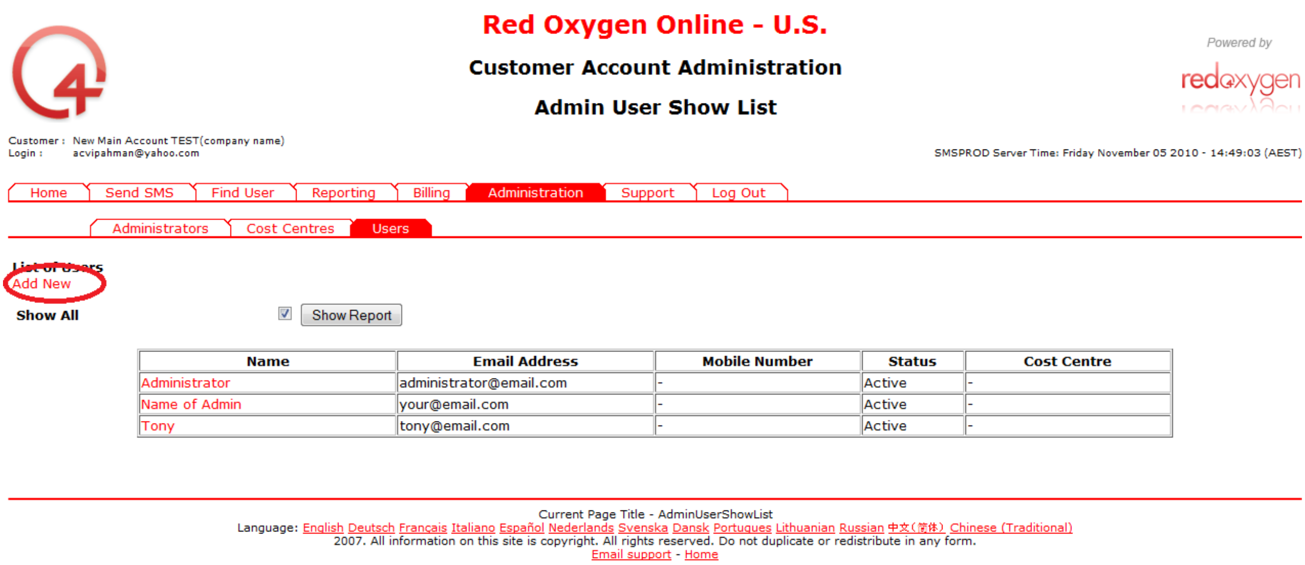
Administration of your customer account and user accounts is one of the core uses of the Web Administrator tool. The *Administration* tab allows administrators access to a variety of configuration options, such as managing users, other administrators and cost centres.

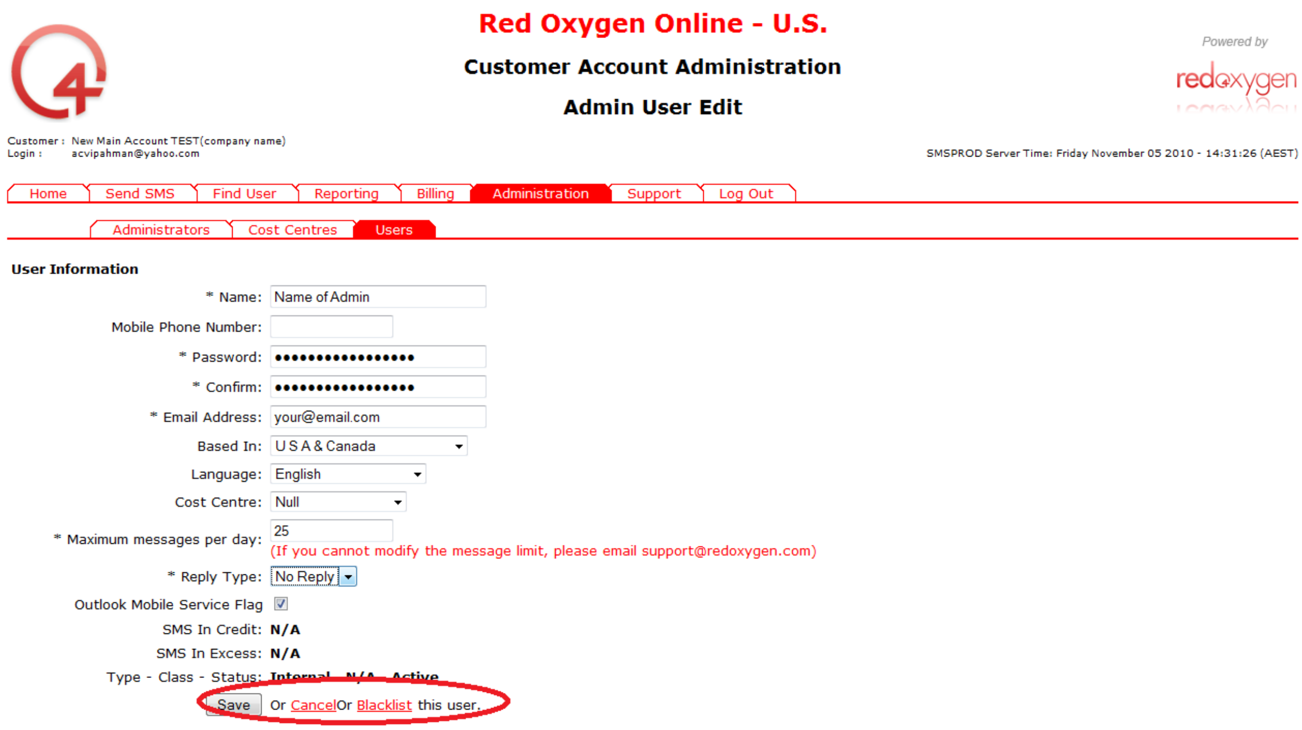


TASK	ADMIN			EXPLANATION
	A	B	C	
2.4.1 Viewing the List of Administrators	•			Under the *Administration* tab and then under the *Administrators* sub-tab, you will see a list of administrators. Each administrator is listed by name with their department and access level details displayed to the right. The *Administrators* sub-tab is the default view under the Administration tab.

2.4.2 Adding a New Administrator	•			Under the *Administration* tab and then under the *Administrators* sub-tab, you will see a list of administrators. At the top of this table, click the "Add New Administrator" link. Enter the details of the new Administrator. Of importance are the name, email, phone number, and password fields. Ensure these are filled out correctly. By default, administrators are granted the lowest access level, "Help Desk". Make sure that you select a desired access level before proceeding. *Note that you can only add an administrator of an equal or lower level of access as yourself*. For more information on contact options (i.e. Sales Contact, Billing Contact, and Technical Contact), see section 2.4.4, 2.4.5, and 2.4.6. Once you have chosen the desired contact status of the new administrator, click the submit button.
2.4.3 Editing an Administrator	•			Click on an administrators name under the *Administrators* sub-tab (see section 2.4.1). All of the administrator's details will be displayed in editable fields. See section 2.4.2 for more information on important fields. For more information on contact options (i.e. sales contact, billing contact, and technical contact), see section 2.4.4, 2.4.5, and 2.4.6. Once you have edited the desired fields, click the submit button. *Note that you can only edit an administrator of an equal or lower level of access as yourself.*
2.4.4 Making an Administrator a Sales Contact	•			A sales contact marks an administrator as the primary or secondary contact for all sales related correspondence with Red Oxygen or your reseller. To make an administrator a sales contact, go to the edit administrator page (see section 2.4.3), and scroll to the bottom three fields. Click the primary or secondary radio buttons to activate the administrator as either of these levels of sales contact. Once you have done this, click the submit button. *Note that you can only edit an administrator of an equal or lower level of access as yourself.*
2.4.5 Making an Administrator a Billing Contact	•			A billing contact marks an administrator as the primary or secondary contact for all billing related correspondence with Red Oxygen or your reseller. It also uses this contact's name and details to place on invoices. To make an administrator a billing contact, go to the edit administrator page (see section 2.4.3), and scroll to the bottom three fields. Click the primary or secondary radio buttons to activate the administrator as either of these levels of billing contact. Now check the administrator's address details are filled out in full (these will appear on invoices). Once you have done this, click the submit button. *Note that you can only edit an administrator of an equal or lower level of access as yourself.*
2.4.6 Making an Administrator a Technical Contact	•			A technical contact marks an administrator as the primary or secondary contact for all technical related correspondence with Red Oxygen or your reseller. A primary technical contact is generally considered to be one of the core administrator types, as support/technical issues will be direct to this contact first. A primary technical contact will receive a copy of error emails which are sent out to users when they have a recognised error sending SMS messages. This enables the administrator to respond quickly to the user's issue. To make an administrator a technical contact, go to the edit administrator page (see section 2.4.3), and scroll to the bottom three fields. Click the primary or secondary radio buttons to activate the administrator as either of these levels of technical contact. Once you have done this click the submit button. *Note that you can only edit an administrator of an equal or lower level of access as yourself.*

TASK	ADMIN			EXPLANATION
	A	B	C	
2.4.7 Creating Cost Centres	•			Under the *Administration* tab is the *Cost Centre* sub-tab. A list of current cost centres is displayed here in a table, with another column for each cost centre's contact. To add a new cost centre, click "Add New Cost Centre". Enter the name of the cost centre and select and administrator to act as the cost centre's contact, and then click submit.
2.4.8 Edit a Cost Centre	•			Under the *Administration* tab is the *Cost Centre* sub-tab. A list of current cost centres is displayed here in a table, with another column for each cost centre's contact. Click on the cost centre that you wish to edit. From the next screen you can edit the name of the cost centre, the contact, and add new users (see section 2.4.11). To add existing users, see section 2.4.12.



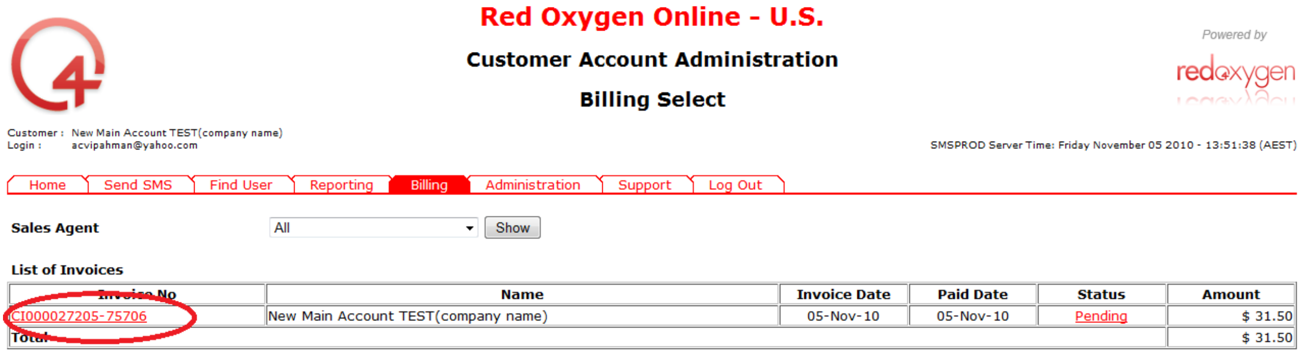


TASK	ADMIN			EXPLANATION
	A	B	C	
2.4.9 Create a New User	•			New users need to be manually created if active creation is switched off or a particular user is not using one of the customer's registered domains and, therefore, cannot be automatically created. There are two methods for adding new users. The first method is the most common. The second is adding the user via the *Cost Centres* sub-tab under *Administration* (see section 2.4.11). Under the *Administration* tab is the *User* sub-tab. On this page is a list of users. At

				the top of the page, click the "Add New User" button. Now add the two most important fields; the user's name and email address. If the user is going to be either using Red Alert and authenticating via password authentication, or logging on to the Web Administrator, they will need to be given a password. Please inform the user of their password. Now click the submit button.
2.4.10 Edit a User	•			Under the *Administration* tab is the *User* sub-tab. On this page is a list of users. Click on the user you wish to edit to get to the user details page. Scroll to the bottom of the user's details and click the "Edit" link. The following fields are considered commonly edited or important fields: ▪ email address (if the user changes their email address) ▪ password (for Red Alert or login onto the Web Administrator) ▪ cost centre Once you have changed these fields, click the submit button.
2.4.11 Add a New User to a Cost Centre	•			Under the edit cost centre screen (see section 2.4.8), a list of users for that cost centre will be displayed. You can create an entirely new user, via this screen, by clicking the "Add New User" link at the top of the list of customers. Now add the two most important fields; the user's name and email address. If the user is going to be either using Red Alert and authenticating via password authentication, or logging on to the Web Administrator, they will need to be given a password. Please inform the user of their password. Now click the submit button. This user will be created as a new user but will also be attached to the cost centre that the user account was created in.
2.4.12 Add Existing Users to a Cost Centre	•			Under the *Administration* tab is the *User* sub-tab. On this page is a list of users. Click on the user you wish to edit to get to the user details page. Scroll to the bottom of the user's details and click the "Edit" link. On this page is a field called "Cost Centre". This field has a drop down box with a list of current cost centres. Select the cost centre that you wish this user to be added to, and then click the submit button at the bottom of the page.
2.4.13 Edit a User's Daily Limit	•			Under the *Administration* tab is the *User* sub-tab. On this page is a list of users. Click on the user you wish to edit to get to the user details page. Scroll to the bottom of the user's details and click the "Edit" link. On this page is a field called "Maximum messages per day", enter a number and change your daily limit there, then click the submit button at the bottom of the page. If you can't change your daily limit, please contact your reseller or Red Oxygen to have this limit changed.
2.4.14 Check a User's Environment Details	•			Under the *Administration* tab is the *User* sub-tab. On this page is a list of users. Click on the user you wish to view to get to the user details page. At the bottom of the page are several fields listing details about the environment the user is sending messages from. Note that these details are only available if the user has sent a message and are only as current as the date of the last message that was sent. Additionally, users using the NotesSMS line of products will not have this information available. Operating System Version: The version of the Operating System, followed by the version of the Service Packs installed (if any), followed by the screen resolution. Mail Client Version: The numerical version string is listed here.

				Red Oxygen Software Release: This field will indicate either the version number of the software and/or the version name. Time zone: This will be listed in minutes, e.g. 600 would indicate a time zone of +10:00 GMT. Day Light Savings Flag: If this is set to 0, then the user is not in a daylight savings state, or they have their daylight savings checkbox is unticked in their system clock. If it is set to 1, then daylight savings time applies.
2.4.15 Cancelling, Suspending, or Blacklisting a User	•			Under the *Administration* tab is the *User* sub-tab. On this page is a list of users. Click on the user you wish to edit to get to the user details page. Go down to the user's status and select the desired status. Blacklisting will completely prevent that user from sending messages or creating a new account with that email address.

2.5 BILLING



The billing and tariffing features of the Web Administrator will primarily interest Primary Billing Contacts, as well as administrators' setup at the Accounting & Reports level of access. The Billing tab stores information on your invoices.

TASK	ADMIN			EXPLANATION
	A	B	C	
2.5.1 Viewing the Invoice Report	•	•		Click on the *Billing* tab. A list of invoices, sorted by date issued, will be displayed. The report will also show the following details: ▪ Invoice Date – when the invoice was issued. ▪ Paid Date – when the bill was paid. ▪ Status – whether the bill was paid successfully, or whether it is still in a pending state. ▪ Amount – how much the customer paid. The reporting period can be altered, as explained in section 2.1.3.
2.5.2 Viewing the Invoice	•	•		Click on the *Billing* tab and select the Invoice Number next to the customer's name. This will allow you to view the invoice in "Invoice Details" mode. You can change the level of detail/mode at the bottom of the displayed invoice, by selecting another of the options in the drop down box. These options include "User Usage Per Day" and "Full Usage Details".