

Management Portal

Version 7.5

Table of contents

1	About this document	3
2	About the management portal	3
2.1	Accounts and units.....	3
2.2	Supported web browsers.....	4
3	Step-by-step instructions	5
3.1	Activating an administrator account	5
3.2	Accessing the management portal and the services	5
3.3	Navigation in the management portal	5
3.4	Creating a unit	6
3.5	Creating a user account	6
3.6	Creating a report about the service usage	7
4	Advanced scenarios	9
4.1	Limiting access to the web interface	9
4.2	Limiting access to your company.....	9

1 About this document

This document is intended for administrators who want to use the management portal.

2 About the management portal

The management portal is a web interface to the cloud platform that provides data protection services.

While each service has its own web interface, called the service console, the management portal enables administrators to control services usage, create user accounts and units, generate reports, and more.

2.1 Accounts and units

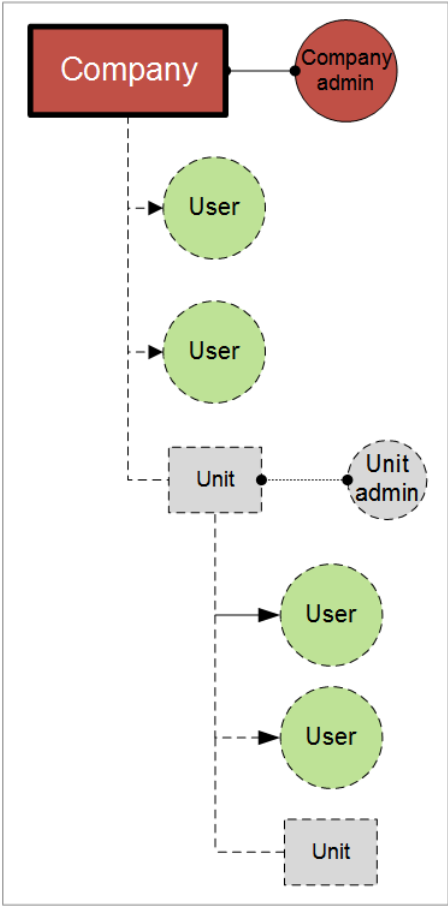
There are two user account types: administrator accounts and user accounts.

- **Administrators** have access to the management portal. They have the administrator role in all services.
- **Users** do not have access to the management portal. Their access to the services and their roles in the services are defined by an administrator.

Administrators can create units, which typically correspond to units or departments of the organization. Each account exists either on the company level or in a unit.

An administrator can manage units, administrator accounts, and user accounts on or below their level in the hierarchy.

The following diagram illustrates three hierarchy levels—the company and two units. Optional units and accounts are shown by a dotted line.



The following table summarizes operations that can be performed by the administrators and users.

Operation	Users	Administrators
Create units	No	Yes
Create accounts	No	Yes
Download and install the software	Yes	Yes
Use services	Yes	Yes
Create reports about the service usage	No	Yes

2.2 Supported web browsers

The web interface supports the following web browsers:

- Google Chrome 29 or later
- Mozilla Firefox 23 or later
- Opera 16 or later
- Windows Internet Explorer 10 or later
- Microsoft Edge 25 or later
- Safari 8 or later running in the OS X and iOS operating systems

In other web browsers (including Safari browsers running in other operating systems), the user interface might be displayed incorrectly, or some functions may be unavailable.

3 Step-by-step instructions

The following steps will guide you through the basic use of the management portal. They describe how to:

- Activate your administrator account
- Access the management portal and the services
- Create a unit
- Create a user account
- Create a report about the services usage

3.1 Activating an administrator account

After signing up for a service, you will receive an email message containing the following information:

- **An account activation link.** Click the link and set the password for the administrator account. Remember the login that is shown on the account activation page.
- **A link to the login page.** The login and password are the same as in the previous step.

3.2 Accessing the management portal and the services

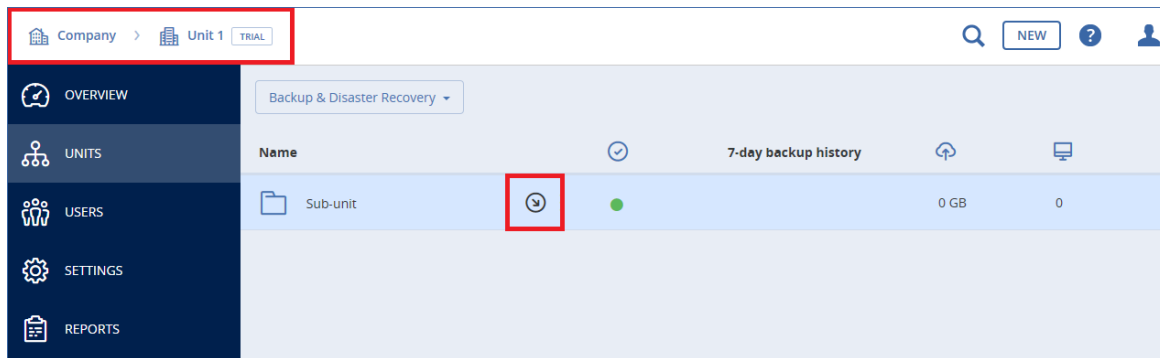
1. Go to the login page. The login page address was included in the activation email message.
2. Type the login, and then click **Continue**.
3. Type the password, and then click **Sign in**.
4. Do one of the following:
 - To log in to the management portal, click **Management Portal**.
 - To log in to a service, click the name of the service.

To access a service from the management portal, on the **Overview** tab, find the service, and then click **Manage service**. Some services also include the capability to switch to the management portal.

3.3 Navigation in the management portal

When using the management portal, at any given time you are operating within the company or within a unit. This is indicated in the top-left corner.

By default, the top-most hierarchy level available to you is selected. The arrow button enables you to drill down the hierarchy. To navigate back to an upper level, click its name in the top-left corner.



All parts of the user interface display and affect only the company or a unit in which you are currently operating. For example:

- By using the **New** button, you can create a unit or a user account only in this company or unit.
- The **Units** tab displays only the units that are direct children of this company or unit.
- The **Users** tab displays only the user accounts that exist in this company or unit.

3.4 Creating a unit

Skip this step if you do not want to organize accounts into units.

If you are planning to create units later, please be aware that existing accounts cannot be moved between units or between the company and units. First, you need to create a unit, and then populate it with accounts.

To create a unit

1. Log in to the management portal.
2. Navigate to the unit in which you want to create a new unit.
3. In the top-right corner, click **New > Unit**.
4. In **Name**, specify a name for the new unit.
5. [Optional] In **Language**, change the default language of notifications, reports, and the software that will be used within this unit.
6. Do one of the following:
 - To create a unit administrator, click **Next**, and then follow the steps described in "Creating a user account" (p. 6), starting from step 4.
 - To create a unit without an administrator, click **Save and close**. You can add administrators and users to the unit later.

The newly created unit appears on the **Units** tab.

If you want to edit the unit settings or specify the contact information, select the unit on the **Units** tab, and then click the pencil icon in the section that you want to edit.

3.5 Creating a user account

Skip this step if you do not want to create additional user accounts.

You may want to create additional accounts in the following cases:

- Company administrator accounts — to share the management duties with other people.
- Unit administrator accounts — to delegate the management to other people whose access permissions will be limited to the corresponding units.
- User accounts — to enable the users to access only a subset of the services.

To create a user account

1. Log in to the management portal.
2. Navigate to the unit in which you want to create a new user account.
3. In the top-right corner, click **New > User**.
4. Specify the following information for the account:
 - **Email address**
 - [Optional] **First name**
 - [Optional] **Last name**
 - [Optional] To specify a login that is different from the specified email address, clear the **Use email address as login** check box, and then specify the login.

Important Each account must have a unique login.
5. [Optional] In **Language**, change the default language of notifications, reports, and the software that will be used for this account.
6. Select the services to which the user will have access and the roles in each service.
 - If you select the **Company administrator** check box, the user will have access to the management portal and the administrator role in all services.
 - If you select the **Unit administrator** check box, the user will have access to the management portal, but may or not have the service administrator role, depending on the service.
 - Otherwise, the user will have the roles that you select in the services that you select.
7. Click **Create**.

The newly created user account appears on the **Users** tab.

If you want to edit the user settings or specify notification settings and quotas for the user, select the user on the **Users** tab, and then click the pencil icon in the section that you want to edit.

3.6 Creating a report about the service usage

Usage reports provide historical data about use of the services.

Report type

You can select one of the following report types:

- **Current usage**
The report contains the current service usage metrics.
- **Summary for period**
The report contains the service usage metrics for the end of the specified period, and the difference between the metrics in the beginning and at the end of the specified period.
- **Day-by-day for period**
The report contains the service usage metrics and their changes for each day of the specified period.

Report scope

You can select the scope of the report from the following values:

- **Direct customers and partners**
The report will include the service usage metrics only for the immediate child units of the company or unit in which you are operating.
- **All customers and partners**
The report will include the service usage metrics for all child units of the company or unit in which you are operating.
- **All customers, partners, and users**
The report will include the service usage metrics for all child units of the company or unit in which you are operating, and for all users within the units.

Scheduled reports

A scheduled report covers service usage metrics for the last full calendar month. The reports are generated at 23:59:59 by UTC time on the first day of a month and sent on the second day of that month to all administrators of your company or unit.

To enable or disable a scheduled report

1. Log in to the management portal.
2. Ensure that you operate in the company or top-most unit available to you.
3. Click **Reports**.
4. Click **Scheduled**.
5. Select or clear the **Send a monthly summary** report check box.
6. In **Level of detail**, select the report scope as described above.

Custom reports

A custom report is generated on demand and cannot be scheduled. The report will be sent to your email address.

To generate a custom report

1. Log in to the management portal.
2. Navigate to the unit (p. 5) for which you want to create a report.
3. Click **Reports**.
4. Click **Custom**.
5. In **Type**, select the report type as described above.
6. [Not available for the **Current usage** report type] In **Period**, select the reporting period:
 - **Current calendar month**
 - **Previous calendar month**
 - **Custom**
7. [Not available for the **Current usage** report type] If you want to specify a custom reporting period, select the start and the end dates. Otherwise, skip this step.
8. In **Level of detail**, select the report scope as described above.
9. To generate the report, click **Generate and send**.

4 Advanced scenarios

4.1 Limiting access to the web interface

You can limit access to the web interface by specifying a list of IP addresses from which the users are allowed to log in.

This restriction applies only at the level where it is set. It is *not* applied to the members of the child units.

To limit access to the web interface

1. Log in to the management portal.
2. Navigate to the unit (p. 5) for which you want to limit the access.
3. Click **Settings > Security**.
4. Select the **Enable logon control** check box.
5. In **Allowed IP addresses**, specify the allowed IP addresses.
You can enter any of the following parameters, separated by a semicolon:
 - IP addresses, for example: 192.0.2.0
 - IP ranges, for example: 192.0.2.0-192.0.2.255
 - Subnets, for example: 192.0.2.0/24
6. Click **Save**.

4.2 Limiting access to your company

Company administrators can limit access to the company for higher-level administrators.

If access to the company is limited, the higher-level administrators can only modify the company properties. They do not see the user accounts and child units at all.

To limit access to the company

1. Log in to the management portal.
2. Click **Settings > Security**.
3. Clear the **Allow administrators from parent tenants to manage this tenant** check box.
4. Click **Save**.