clearvale®

by BroadVision

*Installation*
*Manager*
*Guide*

Clearvale Installation Manager Guide

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BroadVision, Inc.

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BroadVision, Inc.

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## Introduction

The Clearvale Management Center is a tool for managing a Clearvale® installation. Use the Clearvale Management Center to:

- **Manage Clearvale accounts.** Create accounts for each customer. Each account can have one or networks. You assign account managers to manage each account.

- **Manage Clearvale networks.** Networks can be in one of several states, the first of which is typically a trial network. Once a customer purchases a network, you can switch it to an enabled network. Networks can optionally belong to an account. If they belong to an account, they can have the services specified for the account.

- **Monitor account activity.** Using the Clearvale Management Center monitoring tools and reports, you can track the activity of the accounts, networks, and users in your Clearvale installation.

- **Manage your Clearvale installation.** You can set a timeout period for Clearvale passwords in the Clearvale management Center as well as upload custom network themes and page layouts.

- **Communicate with administrators.** You can send email notifications to various groups of users in your installation. For example, you can send emails to all site managers or Account Managers within the Clearvale Management Center or you can send emails to all network administrators in your installation.

- **Reuse Clearvale Login IDs.** You can now free up previously used Clearvale login IDs so that they can be reassigned to new users.

- **Manage the external widget global library.** External widgets created by developers for use one their networks may be published to the global widget library for use by other networks in the installation. Any external widgets published to the global library need to be tested and then approved by BroadVision before they are made available for use on other networks in the installation.

# Accessing the Clearvale Management Center

BroadVision will have provided a custom URL for your version of the Clearvale Management Center as well as one user predefined as an Operations Manager.

The Clearvale Management Center looks as follows when you sign in as an Operations Manager:
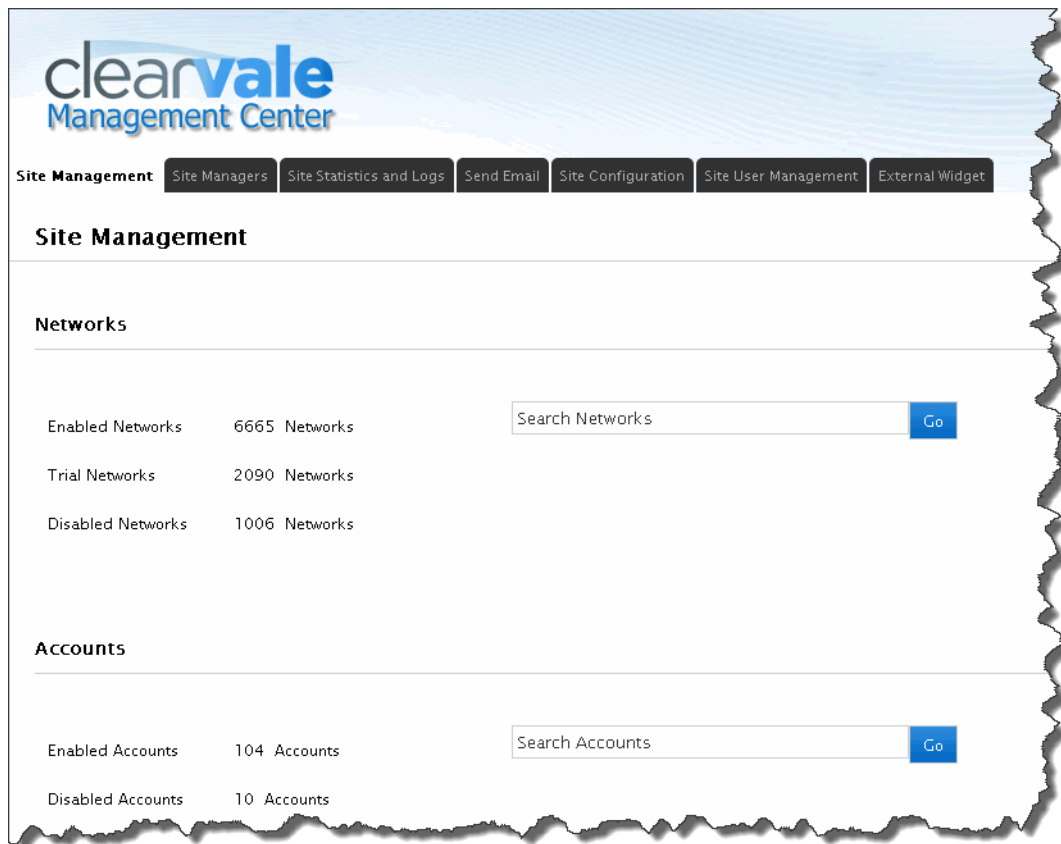
# Understanding Clearvale Management Center Roles

The Clearvale Management Center offers the following roles:

| Role | Purpose |
|------|---------|
| Operations Manager | Manages the Clearvale installation. Creates users for all roles. Manages installation-level features and default settings. Can create, search, provision, allocate, and modify any account or network settings within the installation. Can also set default appearance for networks in installation. |
| Support Manager | Assists the operations manager. Can create, search, provision, allocate, and modify any account or network settings within the installation. Can add more Support Managers. Cannot assign other roles. Cannot delete site managers. |
| Account Manager | Customers can be assigned the account manager role so that they can monitor their Clearvale usage and manage their networks. For any customers that you assign the account manager role, suggest that they read the *Clearvale Account Manager Guide*. |

You must have one of these roles to be able to access the Clearvale Management Center. You cannot be assigned more than one role at a time.

This books assumes that you have, at a minimum, the Support Manager role. Any tasks that require the Operations Manager role are clearly identified.

# Adding Support Managers or Operations Managers

If you are an Operations Manager, you can assign either the Support Manager or Operations Manager role to another person. If you are a Support Manager, you can only assign that particular role to other people.

You can assign one of these roles to anyone at your company. If they already have Clearvale credentials, those credentials are assumed when they sign into the Clearvale Management Center. If the person is not a member of any Clearvale networks, their login is their email address and they are prompted for a password.

### To add an Operations Manager

1. Sign into the Clearvale Management Center as an Operations Manager.

2. Select **Site Managers>Add Manager**.

   The Add Manager page appears.

3. Select the **Operations Manager** role.

4. Enter the email address for the person to make an Operations Manager.

5. Optionally, enter a message.

6. Click **Add**.

### To add a Support Manager

1. Sign into the Clearvale Management Center as an Operations Manager or a Support Manager.

2. Select **Site Managers>Add Manager**.

   The Add Manager page appears.

3. If you see the option, select the **Support Manager** role.

   If you are a Support Manager, you do not see this field. Any site manager that you add is automatically assigned the Support Manager role.

4. Enter the email address for the person to make an Support Manager.

5. Optionally, enter a message.

6. Click **Add**.

# Changing Roles

As an Operations Manager, you can change the role assigned to any Clearvale Management Center user. You can also delete Clearvale Management Center users.

### To change a role

1. Click **Site Managers**.

   The Site Manager page appears and lists all Operations Managers and Support Managers.

2. If you see someone whose role you want to change, select a new role for them from the **Role** drop-down list.

   If you do not see the person, type part of the name in the **Search Managers** field and click **Go**. Or, page through the results of the site managers.

   Once you find the person, select a different role from the **Role** drop-down list. They immediately have the new role.

### To delete a site manager

1. Click **Site Managers**.

2. Navigate to the person that you want to delete.

3. Click the **Delete** link for the user.

   That user can no longer access the Clearvale Management Center. However, they are still members of their networks.

# Creating and Managing Accounts

You should consider setting up accounts for each of your customers. Setting up an account is a multi-step process:

- Add the account to the Clearvale Management Center.
- Designate someone from their company to be the Account Manager.
- Associate any networks the company has created with the account.

Using accounts is optional. However, if you have customers that want to have some further control over their networks and to monitor their Clearvale usage, you must create an account for them. That will allow them to log into the Clearvale Management Center and run various reports on their usage and disable networks, add new networks, and control network-level services.

### To create a new account

1. Click **Site Management**.

   The Site Management page appears.

2. Click **Go** in the Accounts area to display the Accounts page.

3. Click **Add Account**.

4. Enter information to identify the account, such as the company name, an account ID, and a primary contact.

   Try to keep the account names and account IDs unique.

5. Set the account status to **Enabled**.

6. Set the Clearvale services for the account.

For each service that you want to use in your account, select either **Unlimited** for an unlimited number of networks that can access the service, or set the number of networks that can use the service. For no access to a service, set the text box next to the service to 0.

The settings specified here are specific to the account. All networks associated the account have at most the services specified here. You can limit individual networks to a subset of the services specified for the account by navigating to the network detail page and disabling some services.

Be sure to set a value for **Maximum Networks**, as this is 0 by default.

By default, 10 GB of disk space is assigned to each account.

7. Click **Save**.

# Specifying Account Managers for an Account

After you create an account, specify one or more customers to serve as account managers. As an account manager, they can sign into the Clearvale Management Center to monitor their Clearvale usage and modify their network settings.

If customer is a member of a Clearvale network, those credentials are assumed for accessing the Clearvale Management Center. If the person is not a member of any Clearvale networks, their login is their email address and they are prompted for a password.

### To add an Account Manager to an account

1. Click **Site Management**.

   The Site Management page appears.

2. In the Accounts area, type the name or account ID of the account to which to add an Account Manager and click **Go**.

   Any accounts with a matching name or account ID appear.

3. Click on the account name.

   The Customer Information page for the customer appears.

4. Click **Add Account User**.

   The Add Account User page appears.

5. Enter the email address of the person you want to be the Account Manager.

   They are instantly added as an Account Manager.

### To change the Account Managers for an account

1. Click **Site Management**.

   The Site Management page appears.

2. In the Accounts area, type the name or account ID of the account for which to change Account Managers and click **Go**.

   Any accounts with a matching name or account ID appear.

3. Click the account name.

   The account details page appears.

4. Click **Delete** next to the Account Manager to remove from the account.

5. Click **Add Account User** to assign a different person as the Account Manager for this account.

6. Enter the email address of the person you want to be the Account Manager.

   They are instantly added as the new Account Manager.

# Associating a Network with an Account

In general, once a customer has an account, the Account Manager creates new networks from within the Clearvale Management Center and these networks are automatically associated with their account. However, if a customer has an existing network, and it was created in a way that it is not associated with their account, the Operations Manager can manually assign that network to an account.

**IMPORTANT:** When you assign an existing network to an account, the network will have 0 disk space associated with it in the account. As a result, network participants cannot upload any documents to the network. The Account Manager should use the Clearvale Management Center to assign disk space to the network. For more information, see the *Clearvale Account Manager Guide*.

## To associate a network with an account

1. Click **Site Management**.

   The Site Management page appears.

2. In the Networks area, type the name of the network that you want to add to the account and click **Go**. If you do not know the exact name, type part of it and click **Go**.

   The Networks page appears.

3. If you see the network you want to add to an account, click the **Assign** link.

   If you do not see the network, type part of the name in the **Search Networks** field and click **Go**. Or, page through the results of the networks. Once you find the network, click the **Assign** link.

   The Assign network to an account popup window appears.

4. In the **Search Accounts** field, enter the name of the account to which to assign the network and click **Go**. If you do not know the exact name, type part of it and click **Go**.

   Any accounts that match the characters you typed appear. Or, click **Go** to display all possible accounts.

5. Click the **Assign** link next to the desired account.

   Once you assign a network to an account, the Account Manager can allocate and modify account settings, and can access the usage statistics of the account.

# Updating the Services for an Account

Services are provisioned on the account. They can be provisioned for unlimited networks or limited to a certain number of networks. If a specific service is provisioned for unlimited networks, then the corresponding service can be enabled in all networks within the account. However, if a service is provisioned for a limited number of networks, then the account manager is limited to enable the corresponding service to the respective limited number of networks.

### To change the services for an account

1. Click **Site Management**.

   The Site Management page appears.

2. In the Accounts area, type the name or account ID of the account for which to change services and click **Go**.

   Any accounts with a matching name or account ID appear.

3. Click on the account name.

   The Customer Information page for the customer appears.

4. Scroll down to the Clearvale Services section of the page and click **Edit**.

5. For each service, either check **Unlimited** for an unlimited number of networks that can access the service within the account or specify the type of access the account has to each service.

   For no access to a service, set the text box next to the service to 0.

6. Click **Save**.

# Enabling Ecosystems

### To enable an ecosystems for an account

1. Enable the **Ecosystem Management** service for the account.

2. Contact the customer about the name and URL they want for the ecosystem. Then provide them with an ecosystem administrative console.

   The customer should use the ecosystem administrative console to add the networks that comprise the ecosystem and to add members.

   The networks that comprise the ecosystem can be configured by using the Clearvale Management Center, subject to the limitations on the account. However, new networks for the ecosystem cannot be added in the Clearvale Management Center; they must be added by using the ecosystem administrative console.

# Monitoring Disk Space Usage for an Account

To see how much disk space is allocated to an account, display the account page and scroll down to the Networks and Statistics area.



Disk space used and amount allocated for each network in the account appears here. To change this allocation, click Manage and reset the maximum for each network.

Total disk space used/available for the account appear here.

When an account approaches the maximum amount of disk space, network administrators and Account Managers are notified via email that they are running out of disk space for a particular network in the account.

If the network disk space maximum is reached, the following happens:

- Upload buttons in the network are disabled.
- A message appears next to the Upload buttons indicating that the network is out of space.
- Network participants are prevented from uploading any new content.

## Disabling and Deleting Accounts

If a customer is no longer using Clearvale, you can disable their account. Once you disable an account, you have the option to re-enable it or delete it.

### To disable or delete an account

1. Click **Site Management**.

   The Site Management page appears.

2. In the Accounts area, type the name or account ID of the account to disable and click **Go**.

   Any accounts that match the name or ID that you typed appear.

3. Click **Disable** for the account to disable.

   At this point you can choose to permanently delete the account if desired. To do so, click the **Delete** link.

# Managing Networks

For each network within your installation, you can:

- Manage the status of the network.
- Change the network URL.
- Change the network owner.
- Associate the network with an account. This is optional. If networks are associated with an account, they can belong to only one account. Once you add a network to an account, you can track statistics of this network at the account level. Note that when you add a network to an account, the network is limited to the services set at the account level. For information on associating an a network with an account, see "Associating a Network with an Account" on page 13.

# Changing the Status of Network

You can change the status of a network. Possible settings are:

| Type of Network | Possible Status | Description |
|---|---|---|
| Enterprise networks | Enabled | The network is enabled. Any network created in the Clearvale Management Center is automatically enabled. All other networks must be enabled by a site manager. |
| | Pending | The network was created, but the creator has not clicked the activation link that was sent via email. |
| | Disabled | The network is disabled. |
| Trial networks | Enabled | A trial network is created and activated. This network is considered a limited-time trial network. |
| | Pending | The network is created, but the creator has not clicked the activation link that is sent via email. Once activated, this network is considered a limited-time trial network. |
| | Disabled | The trial network is disabled. |
| Express networks | Enabled | The Express network is enabled. |
| | Pending | The Express network is pending. |
| | Disabled | The Express network is disabled. |

Note the differences between the types of networks:

- **Enterprise networks** allow you access to all Clearvale features. Clearvale Enterprise networks are fully customizable.

- **Express networks** focus primarily on members, files, and communities and are more restrictive regarding customization. Express networks are free, but they have a limit on the number of members and communities that you can create.

- **Trial networks** contain all Clearvale features, but the network has a trial banner across the top. Trial networks expire after a 45-day period, unless a site manager extends the trial period. To retain a trial network, the customer needs to purchase the network, at which point the trial label is removed.

### To change the status of a network

1. Click **Site Management**.

   The Site Management page appears.

2. In the Networks area, type the name of the network to assign to an account and click **Go**.

   The Networks page appears.

3. Click on the name of the network.

   The Network information page appears.

4. Scroll down to the Network Status area and click a link to change the status of the network.

| Options | Purpose |
| --- | --- |
| Set Trial | Change the type of network to a trial network. Trial networks contain a banner across the top of the network indicating that it is a trial network. Trial networks are valid for 45 days. |
| Extend Trial | Extend a trial period for a network for 120 days from the current date. |
| Remove Trial | Remove the limitations from a trial network and remove the trial stamp on the network. Once you remove the trial setting from a network, you can change your mind at set it back to Trial mode if necessary. At this point, any content they added while not in trial mode is retained in the network, but the trial limitations are reset for the network. |
| Switch to Full | Turn an Express or Trial network into a full Enterprise network. |
| Switch to Express | Turn a Clearvale Enterprise network into a Clearvale Express network. |
| Disable | Disable the network. Once you disable a network this toggles to **Enable** in case you decide to re-enable this network at some point. |
| Enable | If a network is Disabled, you will see the option of enabling the network. If you enable a network that was previously disabled, the network retains all of its content. |
| Delete | If you disable a network, another option is available—**Delete**. Use this when you are sure you no longer need the network. When you delete a network, the network is permanently deleted. |
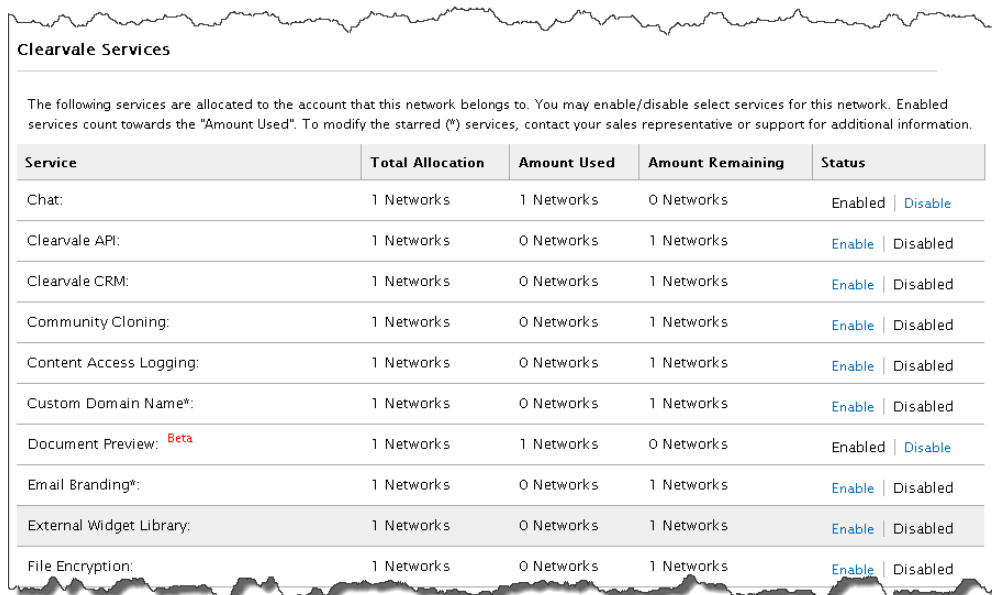
# Changing the Services for a Network

Each network can have a unique set of services that are enabled for it based on the needs of the customer that owns the network. You must enable or disable these services for networks that are not part of an account. For networks that are associated with an account, the customer's account manager can change the services for a particular network.

Note that each network that is part of an account automatically has the account-level services. If you or the account manager want to disable some of these services from a network, you can do so. You cannot enable a service for a network if that service is not enabled for the account.

## To enable or disable services for a network

1. Click **Site Management**.

   The Site Management page appears.

2. In the Networks area, type the name of the network to add services to and click **Go**.

   The Networks page appears.

3. Click on the name of the network.

   The Network information page appears.

4. Scroll down to the Clearvale Services area and click **Enable** or **Disable** as needed in the Status column.

**Clearvale Services**

The following services are allocated to the account that this network belongs to. You may enable/disable select services for this network. Enabled services count towards the "Amount Used". To modify the starred (*) services, contact your sales representative or support for additional information.

| Service | Total Allocation | Amount Used | Amount Remaining | Status |
|---|---|---|---|---|
| Chat: | 1 Networks | 1 Networks | 0 Networks | Enabled \| Disable |
| Clearvale API: | 1 Networks | 0 Networks | 1 Networks | Enable \| Disabled |
| Clearvale CRM: | 1 Networks | 0 Networks | 1 Networks | Enable \| Disabled |
| Community Cloning: | 1 Networks | 0 Networks | 1 Networks | Enable \| Disabled |
| Content Access Logging: | 1 Networks | 0 Networks | 1 Networks | Enable \| Disabled |
| Custom Domain Name*: | 1 Networks | 0 Networks | 1 Networks | Enable \| Disabled |
| Document Preview: Beta | 1 Networks | 1 Networks | 0 Networks | Enabled \| Disable |
| Email Branding*: | 1 Networks | 0 Networks | 1 Networks | Enable \| Disabled |
| External Widget Library: | 1 Networks | 0 Networks | 1 Networks | Enable \| Disabled |
| File Encryption: | 1 Networks | 0 Networks | 1 Networks | Enable \| Disabled |

## Configuring IP Filtering for a Network

The IP Filtering Premium Service enables networks to limit access to your network based on the IP address of the machines accessing the network.

### To enable IP Filtering for a network

1. Click **Site Management**.

   The Site Management page appears.

2. In the Networks area, type the name of the network to add IP Filtering to and click **Go**.

   The Networks page appears.

3. Click on the name of the network.

   The Network information page appears.

4. Scroll down to the Clearvale Services area of the network details page and check **Enable** for IP Filtering.

   The Source IP Restriction area is added near the top of the network information page.
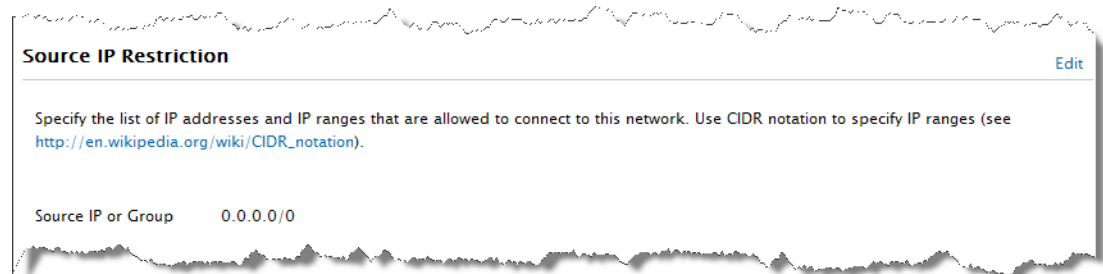


   The default value of `0.0.0.0/0` indicates to allow all IP addresses.

5. Click **Edit** next to the Source IP Restriction area.

6. Specify the list of IP addresses and IP ranges that are allowed to connect to this network.

   You can specify one or more specific IP addresses, such as 168.88.88.88 or you can specify a group, represented by CIDR notation, such as 168.88.88.88/32.

7. Click **Save**.

## Configuring a Different Login Page

For networks that are integrated with other applications, you can configure Clearvale to use the application login page instead of the Clearvale login page. To configure this, make sure that the Clearvale API service is enabled for the network. Then enable the Login Page Redirection service for the network.

In addition to enabling this feature in the Clearvale Management Center, a programmer must customize the application login page so that it authenticates for Clearvale as well as the application. See the see the *Clearvale API Guide* for details on configuring a login page to authenticate for Clearvale.

### To configure Login Page Redirection for a network

1. Click **Site Management**.

   The Site Management page appears.

2. In the Networks area, type the name of the network for which to configure a different login page and click **Go**.

   The Networks page appears.

3. Click on the name of the network.

   The Network information page appears.

4. Scroll down to the Clearvale Services area of the network details page and check **Enable** for Login Page Redirection.

   The Login Page Redirection area is added near the top of the network information page.



5. Click **Edit** next to the Login Page Redirection area.

6. Specify the URL to use for the login page.

   For information about customizing the application login page to authenticate against Clearvale, see the *Clearvale API Guide*.

7. Click **Save**.

## Enabling a Hybrid Network

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Hybrid networks allow Clearvale administrators to make a subset of their network available to guests that they invite to their network.

When enabling a hybrid networks for an account, you have two possible services to enable:

- **Hybrid Network.** Required. This enables hybrid networks for an account.
- **Hybrid Network - External Community.** Optional. Enables the creation of external communities within the hybrid network.

# Changing the Owner of a Network

You can change the owner of a network by using the Clearvale Management Center. The new owner must be a member of the network.

### To change the owner of a network

1. Click **Site Management**.

   The Site Management page appears.

2. In the Networks area, type the name of the network to change the owner of and click **Go**.

   The Networks page appears.

3. Click on the name of the network.

   The Network information page appears.

4. In the Network Information area, click **Edit**.

5. In the **Owner** field, change the email address to that of another member of the network.

6. Click **Save**.

# Changing the URL for a Network

You can change the URL for a network by using the Clearvale Management Center.

To change the URL of a network

1. Click **Site Management**.

   The Site Management page appears.

2. In the Networks area, type the name of the network to change the URL and click **Go**.

   The Networks page appears.

3. Click on the name of the network.

   The Network information page appears.

4. In the Network Information area, click **Edit**.

5. In the **URL** field, enter the name for the new URL.

   A message appears if the new URL is available.

6. Click **Save**.

# Creating New Networks

You can create new networks for your customers in the Clearvale Management Center.

To create a new network from within the Clearvale Management Center

1. Click **Site Management**.

   The Site Management page appears.

2. In the Networks area, click **Go**.

   The Networks page appears.

3. Click **Add Network**.

   The Add Network page appears.

4. Identify the owner of the network.

   Enter the owner's email address and well as their first and last name.

5. Select the type of network to create. Options are:

   • **Express.** Clearvale Express networks are limited to a subset of Clearvale Enterprise functionality, mainly communities and file sharing. When creating the Express network, specify whether the network is an intranet (with members limited to company domain) and whether to restrict member invitations to administrators only.

   • **Enterprise.** Clearvale Enterprise networks contain full Clearvale functionality.

   • **Trial.** Trial networks contain the full Clearvale Enterprise functionality, but are available only for a limited amount of time. When the time expires, customers need to claim the network to continue using it.

6.  Configure who can access your network. Options are:

| Network Access Options | Description |
|---|---|
| Restrict Membership to Customer Domain (Intranet) | Check this option to require that all network members have the same domain in their email address, such as acme.com. If you check this option, anyone with a different email domain is prevented from joining the network. |
| Restrict Invitation Capability to Administrators | Check this option to allow only network administrators to invite people to join the network. People with other roles, such as Writers, cannot invite people to join the network. If you uncheck this option, non-administrators can invite people to join the network. |
| Allow People to Join the Network Without an Invitation | Check this option to provide a way for people to join your network on their own. You can still invite people to join the network, but by checking this option, anyone can request to join the network by clicking **Sign Up Now** on the Login page. |
| Require Administrative Approval for Membership Requests | If you check **Allow People to Join the Network Without an Invitation**, you can also require that any new member be approved by a network administrator before they are allowed to join the network. |

7.  Enter the network name and URL.

8.  Click **Save**.

    You can now invite other members to the network and make one of them the network owner or other type of administrator if desired.

9.  If you are a site manager, you can add the network to an account.

    See "Associating a Network with an Account" on page 13.

## Deleting a Network

You must have the Operations Managers role to delete a network. To delete a network, it first needs to set to disabled. Then you can delete it. When you delete a network, it cannot be recovered.

To delete a network

1.  Click **Site Management**.

    The Site Management page appears.

2.  In the Networks area, type the name of the network to delete and click **Go**.

    The Networks page appears and shows any networks that match the name you specified.

3.  If the network is currently set to **Enabled**, click the **Disable** link to disable the network.

    At this point, a **Delete** link appears for the network.

4.  Click the **Delete** link for the network.

    A prompt appears asking if you are sure you want to delete the network. Click **OK**.

# Setting Clearvale Management Center Password Expiration Period

For improved security, you can set an expiration period for your Clearvale Management Center passwords.

By default, Clearvale passwords do not expire. When you set this value, each person who signs into the Clearvale Management Center is required to change their password after the allotted time has passed. They are prevented from logging in until they change their password.

If you change your password when signing into the Clearvale Management Center, it applies to all Clearvale networks on your installation.

### To set a password expiration period for the Clearvale Management Center

1. Click **Site Configuration**.

   The Site Configuration page appears.

2. Click **Enable password expiration**.

3. Select the number of months that a password is valid.

   Select a number between 1 and 12.

4. Click **Save**.

# Customizing Themes and Layouts

Clearvale provides several network themes and page layouts for use in your network. As an Operations Manager, you can upload *custom* network themes and page layouts. If you upload custom network themes or page layouts, these are immediately available to all networks within your installation.

You should work with BroadVision Global Services for help with customizing themes and layouts for your installation.

## To upload additional network themes and page layouts

1. Click **Site Configuration**.

    The Site Configuration page appears.

2. To upload additional themes, under Themes, click **Browse** to find the zip file that contains your theme files.

3. To upload additional page layouts, under Layouts, click **Browse** to find the zip file that contains your layout files.

4. Click **Save**.

# Monitoring Clearvale Usage

Use the Clearvale Management Center to track installation, account, and network usage information.
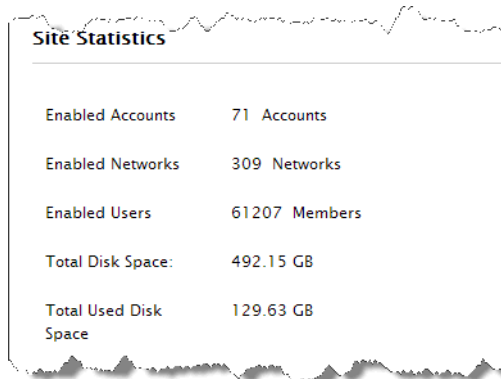
## Viewing Installation Statistics

Installation statistics include the number of accounts, networks, and users in your installation. It also includes the total amount of disk space available and how much is used.

To view installation statistics

1.  Click **Site Statistics and Logs**.

    The Statistics & Logs page appears and gives high-level totals for your site.

    | Site Statistics | | |
    | --- | --- | --- |
    | Enabled Accounts | 71 | Accounts |
    | Enabled Networks | 309 | Networks |
    | Enabled Users | 61207 | Members |
    | Total Disk Space: | 492.15 GB | |
    | Total Used Disk Space | 129.63 GB | |

# Generating Reports

The Clearvale Management Center provides several reports that you can run. The reports are generated as a CSV file. You can open them in Microsoft Excel or a text editor. The reports are organized as follows:
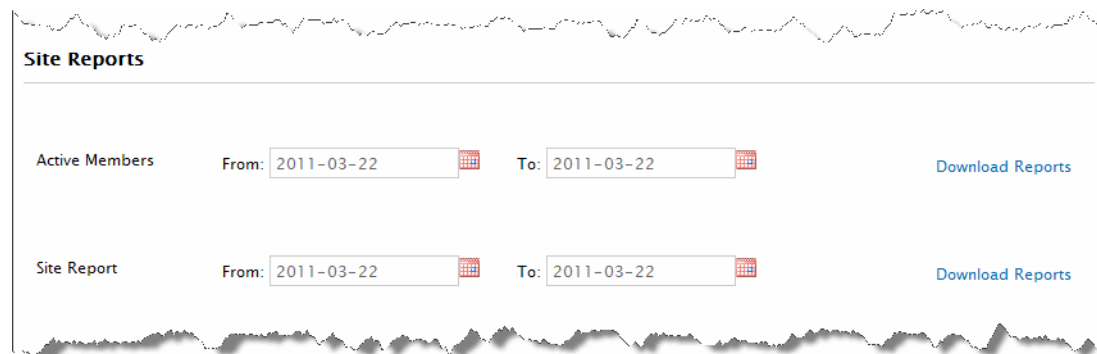
- "Site-Level Reports," next
- "Account-Specific Reports" on page 32
- "Network-Specific Reports" on page 33

## Site-Level Reports

These reports cover all accounts in your installation.

### To run a site report

1. Click **Site Statistics and Logs**.

2. Scroll down to the Site Reports area.



3. Enter a time period for which to run a particular report and then click **Download Reports**.

   The types of reports that you can run are described below.

**Active Members Report**

This report lists the daily number of active members for each account. When determining the number of active users, only users who sign into a network within the accounts are counted.

This report lists:

- A daily tally of how many users signed into all networks within each account. If the same user signs into two different networks within the same account, this is counted as two users. If the same user signs into one network multiple times, this is counted as one user.

- A summary of all user activity for the account over the time period specified. The Unique Users column displays the sum of the daily tally for each account. The Enabled Members column lists the number of active (enabled) members for each account as of the last day of the report.

Site Report        This report lists details about all accounts in your site as of the ending date of the report.

This report lists:

- A complete list of accounts, with a summary of their usage, including number of networks, active members, and disk usage.
- Total number of networks, with a break down for each type of network.
- Total number of members, with a break down for each type of member.

## Account-Specific Reports

These reports are specific to individual accounts within the Clearvale Management Center. To run these reports, navigate to a detail page for an account.

### To run an account report

1. Click **Site Management**.
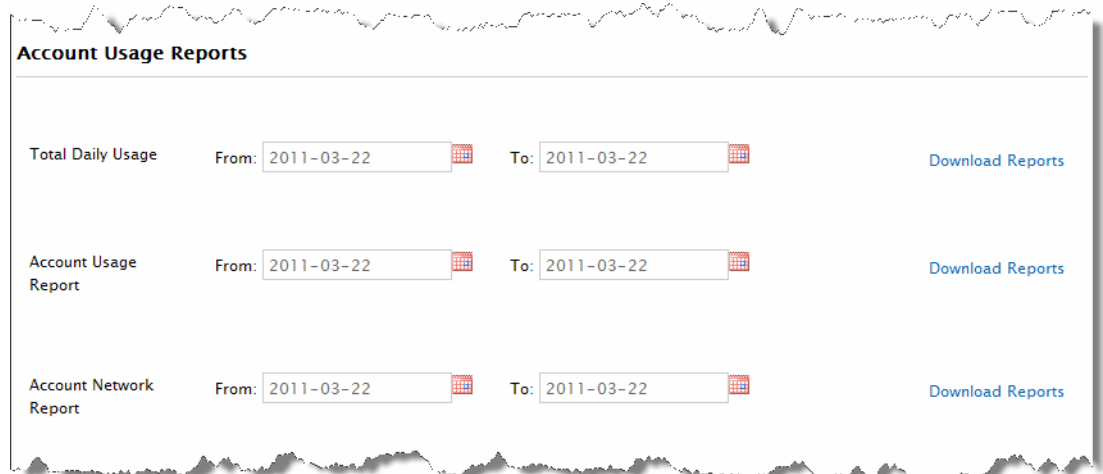
   The Site Management page appears.

2. In the Accounts area, type the name or account ID of the account for which to change services and click **Go**.

   Any accounts with a matching name or account ID appear.

3. Click on the account name.

   The Customer Information page for the customer appears.

4. Scroll down to the Account Usage Reports area.



5. Enter a time period for which to run a particular report and then click **Download Reports**.

   The types of reports that you can run are described below.

Total Daily Usage Report
This report tallies the number of unique visitors for each network, for each day in the reporting period.

Account Usage Report
This report:
- Tallies the total number of members for each network as of the last day of the reporting period.
- Includes sub-counts of enabled and disabled members.
- Lists the total number of active members in each network over the reporting period and lists disk space usage for each network.

Account Network Report
For each network belonging to the account, this report lists the status of the network, number of network members, disk space used, and any services enabled.

# Network-Specific Reports

These reports are specific to individual networks. To run these reports, navigate to a detail page for a network

## To run a network report

1. Click **Site Management**.

   The Site Management page appears.

2. In the Networks area, type the name of the network to delete and click **Go**.

   The Networks page appears and shows any networks that match the name you specified.

3. Click on the network name.

   The Network Information page appears.

4. Scroll down to the Network Usage Reports area.
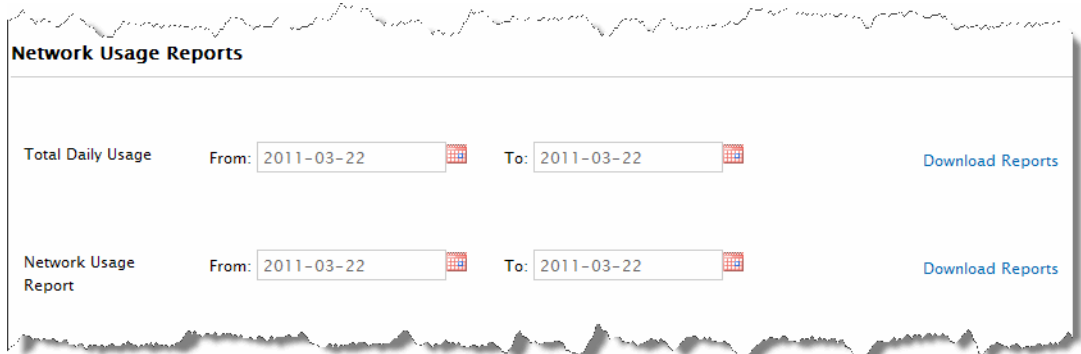


5. Enter a time period for which to run a particular report and then click **Download Reports**.

   The types of reports that you can run are described below.

Total Daily Usage Report

This report tallies the number of unique visitors for the network, for each day in the reporting period.

Network Usage Report

This report:

- Tallies the total number of members for the network as of the last day of the reporting period.

- Includes sub-counts of enabled and disabled members.

- Lists the total number of active members in the network over the reporting period and lists disk space usage for the network.

# Viewing Account Statistics

Account statistics include the number of networks in the account, the total number of unique members across all networks in the account, the number of active members (members that are not disabled), and the disk space used.

### To view account statistics

1. Click **Site Management**.

   The Site Management page appears.

2. In the Accounts area, type the name or account ID and click **Go**.

   Any accounts that match the name or ID that you typed appear.

3. Click the name of the account for which you want to view account statistics.

4. Scroll down to the Account Statistics area where you will see:

   • **Total Networks**—This is the total number of networks in the account.

   • **Total Members**—This is the total number of unique members among all networks in the account.

   • **Enabled Members**—The total number of unique members that are active. Active means that the members are not disabled. It does not have anything to do with whether the person is a frequent participant on the network.

   • **Total Used Disk Space**—The total amount of used disk space and the amount of disk space allocated for the account.

# Monitoring the Use of Clearvale Services

### To monitor the usage of Clearvale services

1. Click **Site Management**.

   The Site Management page appears.

2. In the Accounts area, type the name or account ID and click **Go**.

   Any accounts that match the name or ID that you typed appear.

3. Click the name of the account for which you want to monitor use of Clearvale services.

4. Scroll down to the Clearvale Services area.

   Here you see for each service, the total account allocation, the amount they have used, and the amount remaining.

# Viewing Clearvale Management Center Activity

The Clearvale Management Center records who makes changes to the networks and accounts in the Clearvale Management Center.

The following types of activities are recorded:

- Logging into the Clearvale Management Center
- Disabling or enabling a network
- Adding or deleting a network or account
- Sending an email messages
- Enabling services

By default, this log shows the activities for the current day. You can change it show a different time period. The activities are displayed sequentially, with the most recent Management Center activity displayed first.

### To view the Clearvale Management Center activity log

1. Click **Site Statistics and Logs**.

   The Statistics & Logs page appears.

2. Scroll down to the Management Center Activity Log area.

3. Set the time period for which you want to see the activity log.

# Sending Email Messages

Occasionally, you may find that you want to send email messages to other Clearvale Management Center users or to the administrators of all networks. The Clearvale Management Center provides a page where you can send messages to these people.

In particular, you can send email messages to:

- All site managers
- All Account Managers
- All network administrators (Owners, Supervisors, and Administrators)
- Specific individuals

The return address for the email is pre-determined by BroadVision when your installation is set up.

### To send an email message

1. Click the **Send Email** tab.

2. Check the checkboxes for the email recipients.

3. Add any email addresses for anyone else who should receive the message.

4. Enter a subject for the email

5. Use the email editor to customize the look of the message. You can include images or URL links.

6. Click **Send**.

    The message is sent to all selected people. If you have a large site, it may take a while for the messages to be sent to everyone.

    To verify that the message was sent, click the **Site Statistics and Logs** tab and scroll down to the Management Center Activity Log. When all messages have been sent, you will see this confirmation message:

    ```
    took action send-notification on the site with info: notifications sent
    ```

# Reusing Clearvale Login IDs

You can free up previously used Clearvale login IDs so that they can be reassigned to new users. When you free up a user ID, the original user is renamed in Clearvale as **deleted*<date>_<login-id>***. For example, if you have a user with the login ID **sally.smith@broadvision.com**, the user would be renamed as **deleted20161221_sally.smith@broadvision.com**. The login ID **sally.smith@broadvision.com** can then be reassigned to another user.

Reassigning Clearvale login IDs is handled in the Clearvale Management Center under the **Site User Management** tab. You must have the role of Operations Manager to be able to reassign login IDs.
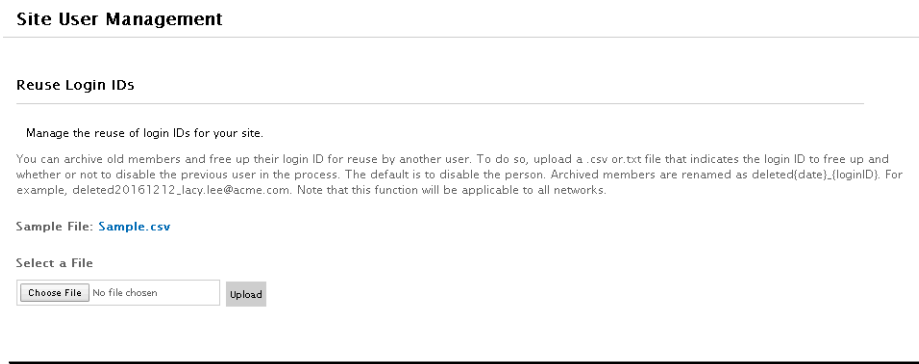


The sample upload file looks as follows:



The first column indicates the name to reuse and the second column indicates whether the original user should also be disabled within Clearvale. The default value is `yes`.

You'll receive an email message from Clearvale confirming the login ID changes.

# Managing the Global Widget Library

Use the **External Widget** tab in the Clearvale Management Center to manage the external widgets that are added to the global widget library. The global widget library is a collection of external widgets that are available for use on any network within your Clearvale installation. For information on creating an external widget and submitting it for approval to the global widget library, see the *Clearvale Developer Guide*.

This section covers various tasks that pertain to managing the global widget library, including the following:

- "Reviewing External Widgets Submitted to the Global Library," next
- "Approving or Rejecting External Widgets" on page 40
- "Disabling External Widgets in the Global Library" on page 41
- "Viewing Delisted External Widgets" on page 42
- "Configuring Email Notifications" on page 42

**IMPORTANT:** Only BroadVision Support can approve or reject external widgets submitted to the global widget library.

# Reviewing External Widgets Submitted to the Global Library

Any external widgets submitted to the global library need to be reviewed before it can be approved or rejected from the global library.

### To review an external widget for the global library

1. Sign into the Clearvale Management Center.

2. Click the **External Widget** tab.

   The Pending Approval page appears.

3. Click the **Test Networks** tab.

   This page lists any test networks that have been added. You can use one of these, or add another network. Each test network includes all of the widgets pending approval.

4. Sign into a test network as an administrator.

5. Select **Admin>External Widgets>Global Library**.

6. Click the **Pending Widgets** link.

   Any global widgets pending approval appear.

7. Click **Install** to install the pending widget on the network.

8. Verify that the widget meets BroadVision standards.

# Approving or Rejecting External Widgets

After you have reviewed and tested the external widget submitted to the global library, you need to decide whether to approve or reject the external widget.

### To approve an external widget for the global library

1. Sign into the Clearvale Management Center.

2. Click the **External Widget** tab.

   The Pending Approval page appears.

3. Click **Approve** or **Reject** next to the external widget.

   • If you approve the widget, it is listed on the **Approved** tab. It is also added to the global widget library for your installation. This means that any other network within the installation can use the widget in their network.

   • If you reject the widget, it is listed on the **Not Approved** tab. The widget is not added to the global library. You might want to provide some feedback to the person who submitted the widget for approval and let them know why the widget was rejected.

# Disabling External Widgets in the Global Library

After an external widget is approved for the global library, you may find that you need to disable the external widget. For example, if the widget was approved, but is found to be troublesome, you can disable the widget. This prevents anyone else from installing the widget.

### To disable an external widget in the global library

1. Sign into the Clearvale Management Center.

2. Select **External Widget>Approved**.

   The Approved page appears and lists all approved external widgets in the global library.

3. Click **Disable** next to the widget to disable.

   The following happens within the Clearvale Management Center:
   - The widget is removed from the Approved list.
   - The widget is added to the Disabled list. (Click the **Disabled** tab.)

   The following happens in any networks in your installation:
   - The widget is no longer listed on the **Admin>Global Library** tab as a possible widget to install on the network.
   - If the widget is already installed on the network, it is still available for use on that network.

### To enable a disabled external widget

1. Sign into the Clearvale Management Center.

2. Select **External Widget>Disabled**.

3. Click **Enable** next to the external widget to enable.

   The following happens within the Clearvale Management Center:
   - The widget is removed from the Disabled list.
   - The widget is added to the Approved list. (Click the **Approved** tab.)

   The following happens in any networks in your installation:
   - The widget appears again on the **Admin>Global Library** tab as a possible widget to install on the network.

## Viewing Delisted External Widgets

If the network administrator removes an external widget from the global library (by clicking **Remove from Library**), the widget appears on the **Delisted** tab in the Clearvale Management Center.

## Configuring Email Notifications

Clearvale sends notifications regarding external widgets that are pending approval, rejected, and so on. The notifications are sent via email to selected operations managers and support managers.

### To identify people to receive external widget notifications

1. Sign into the Clearvale Management Center.

2. Click **External Widget>Email Notifications**.

   The list of operations managers and support managers for your installation appears.

3. Click **Add** next to the person or people to receive email notifications pertaining to approving external widgets.