clearvale®

by BroadVision

Account Manager Guide

Clearvale Account Manager Guide

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Contents

1 Managing Your Clearvale Account 5

Accessing the Clearvale Management Center 6
- Adding and Deleting Account Managers 7

Changing the Services for a Network 8
- Configuring IP Filtering for a Network 9
- Configuring a Different Login Page 10
- Enabling a Hybrid Network 11
- Enabling Document Preview 11
- Enabling File Encryption 11
- Enabling Chat 12

Creating a New Network 13
- Allocating Disk Space for a New Network 13

Disabling a Network 15
Generating Usage Reports 16
- Running Account Reports 16
- Running Network Reports 17

Viewing Account Statistics and Service Use 18
Monitoring Clearvale Disk Space Usage 19
Sending Email Messages 20

1 Managing Your Clearvale Account

Each Clearvale Enterprise customer has an account in the Clearvale Management Center. Use this account to manage your Clearvale® networks. In particular, you can:

- **Specify Clearvale services for networks in your account.** When you purchase Clearvale, an account is created for you that controls the specific Clearvale features, premium services, and disk space that you have purchased. The account-level settings are controlled by your service provider and are assumed for all networks in your account. However, you can fine-tune the services used for specific networks.
- **Create new networks associated with your Clearvale account.** You can use the Clearvale Management Center to create new networks (assuming that your account allows for additional networks).
- **Monitor your Clearvale account activity.** You can monitor the activity and usage on your Clearvale networks.
- **Send email messages to Clearvale account managers and network administrators.** You can send email messages from within the Clearvale Management Center to all of the account managers defined for your account and to all of the network administrators defined in the networks within your account. (Network administrators includes those with the role of Owner, Supervisor, or Administrator.)

TIP: If you have created a network that you do not see listed in the Clearvale Management Center, it is probably because the network is not associated with your Clearvale account. Ask your service provider to associate the network with your account so that you can monitor and manage the network through the Clearvale Management Center.

Accessing the Clearvale Management Center

Your service provider should share the Clearvale Management Center URL with you and provide, at a minimum, one user who is designated as an account manager. The account manager can sign into the Clearvale Management Center using their usual Clearvale login.

Once signed in, go to your account page where you can manage your Clearvale account.

To access the Clearvale Management Center

1. Enter the URL for the Clearvale Management Center.

   Depending on your service provider, the URL will look something like this:

   `https://cvmc.service-provider.com`

   For example, if BroadVision is your service provider, the URL is:

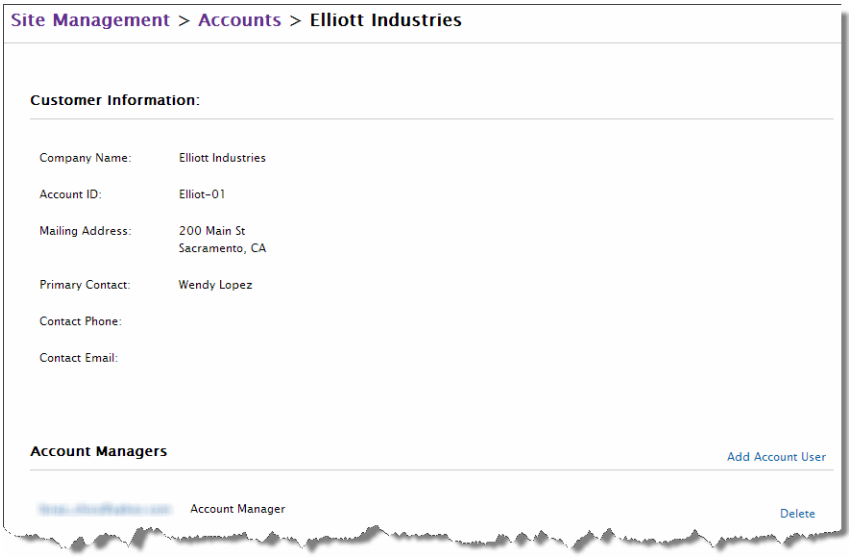
   `https://cvmc.clearvale.com`

2. Sign in with your Clearvale login and password.

To navigate to your account page

- On the Site Management page, click **Go** in the Accounts area and then click on your account name.
- Or, use the **My Accounts** drop-down list at the top-right of the Clearvale Management Center and select your account name.

The account page looks as follows:



Adding and Deleting Account Managers

You can designate multiple people to manage your Clearvale account in the Clearvale Management Center.

To add an account manager

1. Navigate to your account page in the Clearvale Management Center.
2. Click **Add Account User**.
3. Enter an email address and an optional message.
4. Click **Add**.

   They are immediately added as an account manager for your Clearvale account.

To delete an account manager

1. On your account page, click **Delete** next to the account manager to remove.

   Be careful not to delete a lone account manager as you will have no way to access the Clearvale Management Center.

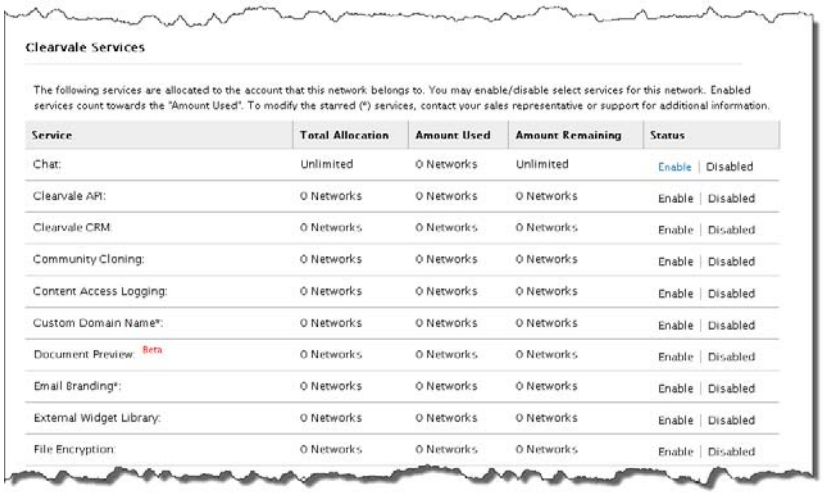
Changing the Services for a Network

Clearvale services are features within Clearvale that are authorized for your account. If you want to disable some of these services from a network, you can do so. If you want to enable services to a particular network, you can enable the services assuming that they are enabled at the account level. Note that some services have a quantity associated with them that may limit your use.

To enable or disable services for a network

1. Navigate to your account page in the Clearvale Management Center.
2. Click on the **Manage** link for one of your networks.

   The Network information page appears.
3. Scroll down to the Clearvale Services area and click **Enable** or **Disable** as needed in the Status column.



Settings that you can change for your network are shown in the blue font. If you see other services that you are interested in using, contact your service provider about enabling them for your account.

Configuring IP Filtering for a Network

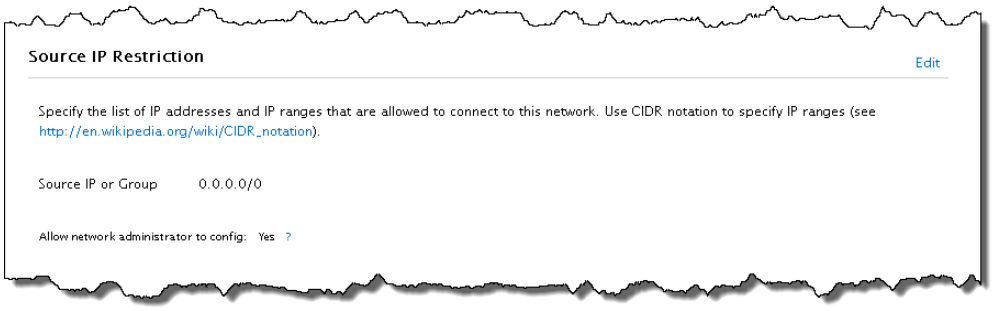
If you have purchased the IP Filtering Premium Service, and it is enabled for your account, you can configure it for one or more networks. By using this feature, you can limit access to your network based on the IP address of the machines accessing the network.

To enable IP Filtering for a network

1. Navigate to your account page.
2. Click on the **Manage** link for one of your networks.

   The Network information page appears.
3. 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.
4. Click **Edit** next to the Source IP Restriction area.
5. 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.
6. If you want to allow the network administrator to make changes the IP restrictions, place a check mark next to the **Allow network administrator to config** option.

   The network administrator can then select **Admin>Security** from within the network and make changes to IP restrictions for the network.
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

Beta

To make a subset of your network available to guests, enable the hybrid network services for your network. You have two possible services to enable:

- **Hybrid Network.** Required. This enables the hybrid network feature for a network.
- **Hybrid Network - External Community.** Optional. This enables your hybrid network to support the creation of external communities as well as guest communities.

In addition to enabling the hybrid network services in the Clearvale Management Center, a network administrator needs to configure the network to allow guests. For more information, see the Clearvale online help.

Enabling Document Preview

Beta

To allow network participants to preview documents rather than downloading the file onto their computer, enable the **Document Preview** service for your network.

Once you enable this feature for a network, documents can be previewed from within the Files widget (by clicking the document icon) or from the document detail page (by clicking the document icon or the file name).

As each document is uploaded to a network, a preview image is generated. For existing documents on the network, the preview image is generated the first time the document is previewed.

Document preview supports the following types of files:

- Microsoft® Word, Excel®, and PowerPoint®
- PDF
- RTF
- TXT

Enabling File Encryption

Clearvale provides an optional service that supports file encryption. When enabled for a network, all new files uploaded to the network are encrypted when stored in the cloud. When downloaded or previewed, the unencrypted version of the file is used. Image, audio, and video files are not encrypted.

To enable file encryption for a network, the **File Encryption** service must first be provisioned for the account by the service provider. Then the account manager must enable the **File Encryption** service for a network within the account. Finally, a network administrator must turn on file encryption for the network on the **Admin>Network Administration** page. See the Clearvale online help for more information on turning on file encryption at the network level.

Enabling Chat

Clearvale provides an optional service that supports the ability for network participants to create chats.

To enable chats for a network, the **Chat** service must first be provisioned for the account by the service provider. Then the account manager must enable the **Chat** service for a network within the account. Finally, a network administrator must turn on chats for the network on the **Admin>Network Administration** page. When a network administrator enables chat for the network, they are prompted for permission to register participants as members on Vmoso by BroadVision.

Creating a New Network

You can create new networks for your account, up to the maximum specified for your account.

To create a new network from within the Clearvale Management Center

1. Navigate to your account page.
2. Click **Add Network**.

   The Add Network page appears.
3. Enter your name as the owner of the network.

   Your email address is assumed, and you are automatically designated as the network owner.
4. If you are an account manager for more than one account, select the account for which to add a new network.
5. Configure how people can join the network.

   A network administrator can adjust these and other network settings after you have created the network by using selecting **Admin>Network Administration**.
6. Enter the network name and URL.
7. Click **Save**.

   You can now invite other members to the network and make one of them the network owner or an administrator (someone with the Supervisor or Administrator role) if desired.

TIP: If you need to add more networks, and you are prevented from creating them in the Clearvale Management Center, contact your service provider about increasing your maximum number of networks.

Allocating Disk Space for a New Network

When you create a new network for an account, you need to allocate some of the account's total disk space for the new network.To add disk space for the new network, you may need to remove some unused disk space from an existing network and assign this space to the new network.

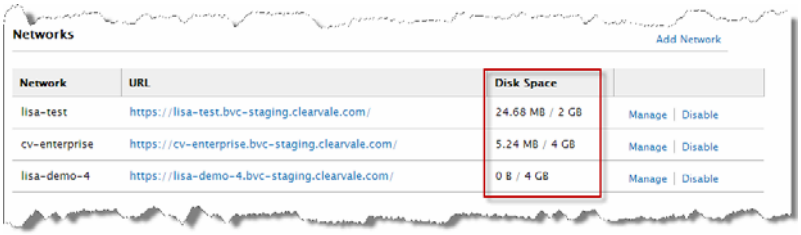
If you need more disk space for your account, contact your BroadVision Sales Representative.

NOTE: If you have an ecosystem of networks, you cannot allocate disk space for each of the networks within the Clearvale Management Center. Disk space for the ecosystem is allocated at the parent network level only.

To change disk space allocation among your networks

1. Navigate to your account page.

2. Scroll down to the Networks area, and check how your disk space is currently allocated across existing networks.



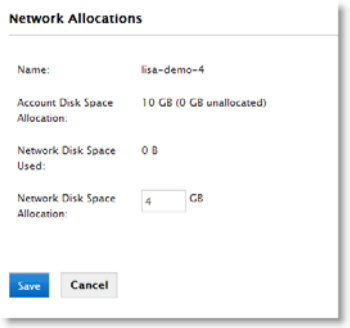
   For example, in the case shown in the image above, since the last network has 4 GB of disk space assigned to it, but the network is empty, you can reduce the disk space for this network, and reassign that space to the new network.

3. Click **Manage** next to the name of the network for which you want to reduce disk space allocation.

   The Network information page appears.

4. Scroll down to the Network Allocations area of the network details page and click **Edit**.

5. In the **Network Disk Space Allocation** box, reduce the space for the network and click **Save**.



6. Navigate back to your account page.

7. Click **Manage** next to the network for which you want to increase disk space allocation.

8. Scroll down to the Network Allocations area of the network details page and click **Edit**.

9. In the Network Disk Space Allocation text box, increase the disk space for this network and click **Save**.

Disabling a Network

You can disable any network associated with your account.

To disable a network

1. Navigate to your account page.
2. Click **Disable** next to the network to disable.

Generating Usage Reports

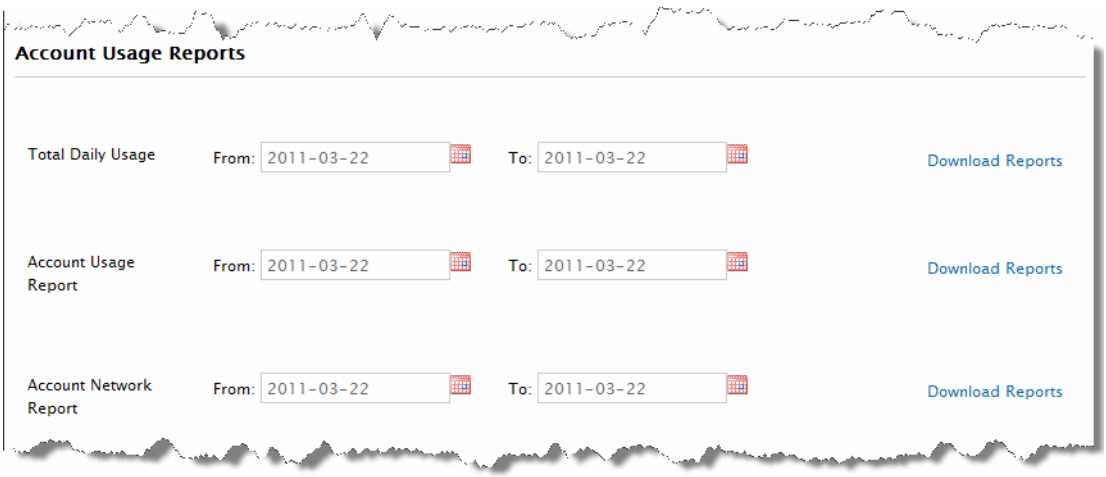
Account managers can run reports about their accounts or specific networks.

Running Account Reports

The Clearvale Management Center provides several reports that you can run for your account. The reports are generated as a CSV file. You can open them in Microsoft Excel or a text editor.

To run an account report

1. Navigate to your account page.
2. Scroll down to the Account Usage 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.

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

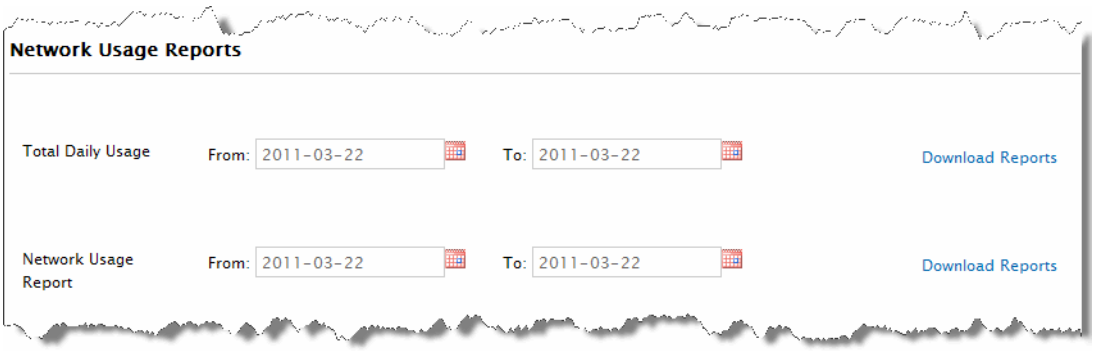
For each network belonging to the account, this report lists the status of the network, number of network members, disk space used, and any services enabled.

Running Network 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. Navigate to your account page.
2. Click **Manage** next to one of your networks.
3. Scroll down to the Network Usage Reports area.



4. 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 and Service Use

Account statistics include the number of networks in your account, the total number of unique members across all networks in the account, the number of enabled members, and the disk space used.

To view account statistics

1. Navigate to your account page.
2. Scroll down to the 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 enabled.
   - **Total Used Disk Space**—The total amount of used disk space and the amount of disk space allocated for your account.

To view the usage of Clearvale services

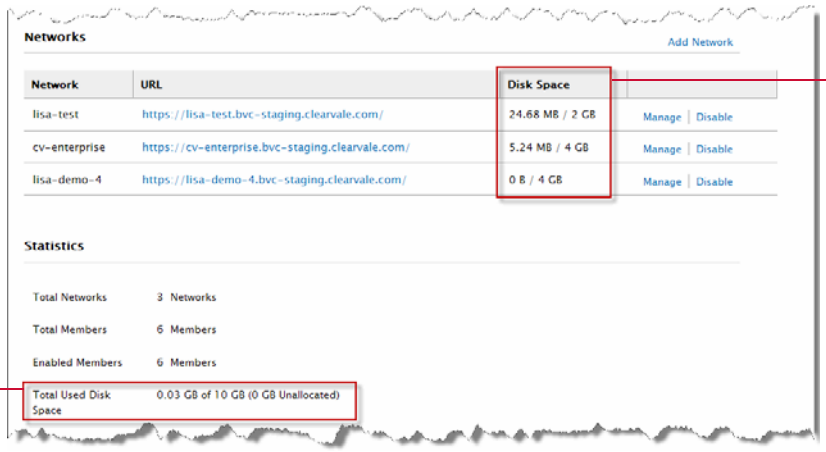
1. Navigate to your account page.
2. Scroll down to the Clearvale Services area.

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

Monitoring Clearvale Disk Space Usage

Your Clearvale account has some disk space allocated to it—the amount varies based on your agreement with BroadVision.

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



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

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

If you find that one network needs more space, you can reconfigure your allocation and remove space from one network and assign it to another. (For more information, see "To change disk space allocation among your networks" on page 13.)

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.

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.

You should work with the customer to allocate existing disk space among networks or for them to purchase additional disk space.

Sending Email Messages

The Clearvale Management Center lets you send email messages to:

- All account managers defined for your account
- All network administrators defined within the networks in your account
- Specific individuals

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

To send an email message

1. In the Clearvale Management Center, click the **Send Email** tab.
2. Check the checkboxes for the email recipients.
3. Add additional email addresses for anyone who should receive the message that isn't an account manager or network administrator.
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.