

Ensim Unify Platform Setup Guide for Service Providers

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Introduction

This guide is designed to help you begin using the control panel after you install the Ensim Unify system. It provides instructions for basic tasks you need to perform.

This guide is also available in the online Help system. To access this guide in the online Help, click **General Help** on the lower left Help navigation bar, then click the **Setup Guide** topic at the top of the table of contents.

As you use this version of the guide, keep in mind that it is optimized for online viewing rather than for use as a book. The guide's internal links, which are available in the online Help version, are disabled in this version. To take advantage of links in this guide, use the online Help version.

Topics in this guide

This guide explains how to perform the following setup tasks:

1. [Verifying platform server information](#)
2. [Enabling services after installation](#)
3. [Adding resources for services](#)
4. [Adding control panel accounts for administrators](#)
5. [Setting general preferences](#)
6. [Adding your brand to control panels](#)
7. [Adding reseller templates](#)
8. [Adding resellers](#)
9. [Adding organization templates](#)
10. [Adding organizations](#)
11. [Viewing usage reports](#)

Logging in

To perform any of these tasks, you need to log in to the service provider control panel.

To log in:

1. Start a browser program and go to

`http://<cp_server_ip_address>/cp`

where `<cp_server_ip_address>` is the IP address of your system's CP server. The Ensim Unify login page is displayed.

2. On the login page, type your username and password. The username is `admin@<your-domain-name>` where `<your-domain-name>` is the domain name of your Ensim Unify system. The password is the password you chose during PE server installation. For more information, see the *Ensim Unify Platform and DNS Installation Guide*.

3. Click **Log In**.

The control panel home page is displayed.

Viewing platform server information

LOGIN LEVEL REQUIRED FOR THIS TASK: SYSTEMS

Platform servers manage platform tasks such as provisioning services and displaying control panels. Through the service provider control panel, service providers can manage two types of platform servers: provisioning engine (PE) and control panel (CP) servers. Information about Active Directory (AD) and MS SQL database servers is not available through the control panel.

To view platform server information:

1. On the top navigation bar, click **administration**.
2. Click the **platform servers** tab.
3. On the platform servers list, select the server whose information you want to view.
4. Click **overview**.

The platform server overview page is displayed.

Enabling services after installation

LOGIN LEVEL REQUIRED FOR THIS TASK: SYSTEMS

Some services are installed in the *disabled* state. You need to change the service's status to *enabled* before you can add hosting servers for the service and sell the service to resellers and organizations.

Enabling the service is a one-time task. Unless you disable the service later, you need to enable the service only after you initially install the service software on the platform servers. You do not need to enable the service each time you add a hosting server.

To enable a service:

1. Log in to the service provider control panel using a systems-level login.
2. On the top navigation bar, click **services**.

The installed services list shows all the services installed on your system, as well as their version numbers, their status, and the list of components they contain. You can also use this page to view and edit applicable service settings.

3. Select the service you want to enable, then click **enable**.
4. In the dialog box, click **OK**.

The service is enabled for your system. If you have [added resources](#) for the service, you can begin selling the service to organizations and resellers.

Adding resources

LOGIN LEVEL REQUIRED FOR THIS TASK: SYSTEMS

After you install a service such as Hosted Exchange 2003, you need to add or register the service's hosting server or resources to the Ensim Unify system. You need to do this before you begin selling the service to resellers or organizations. If you want to expand your server resources for a service, you can install and register additional resources at any time.

The method of adding resources varies, depending on the type of resource you are adding.

About resources

Resources is the umbrella term used to describe the hosting servers on which services are installed as well as resources, such as mailbox stores and public folder stores, on those hosting servers. You add resources when you want to add a service to your system or to increase the server resources available to existing services.

About registering Hosted Exchange 2003 resources

You use the add resource wizard to register the following Hosted Exchange 2003 resources:

- **Mailbox stores that can be shared by multiple organizations.**
These mailbox stores are listed on the resources list. They are considered to be shared mailbox stores. However, their status can be shared, dedicated, or free.
- **Mailbox stores that are reserved for use by a single organization and that can contain multiple mailbox stores.**
Organizations provisioned on these mailbox stores can span multiple mailbox stores. These mailbox stores are listed on the resources list. They are considered to be dedicated mailbox stores. Their status can be dedicated or free.
- **Frontend servers.** *Frontend servers are optional servers used to monitor the status of Hosted Exchange service components such as POP.*

You do not use the add resource wizard to register the following resources:

- **OAB servers.** *You need to set up at least one OAB server. OAB servers contain public folder stores where organization offline address books are stored. OAB servers do not process email traffic, so they do not need to be high-quality servers.*

- **Mailbox stores that are added to other mailbox stores.** You add mailbox stores to dedicated mailbox stores when you want to treat a group of mailbox stores as a single resource. Mailbox stores that are added to dedicated mailbox stores take on the general properties of the dedicated mailbox store. Mailbox stores that belong to dedicated mailbox stores are not listed on the resources list; they are listed on the overview page of the dedicated mailbox store.
- **Public folders on OAB servers:** Public folder stores are used to store the public folders and offline address books of organizations that use the Hosted Exchange service. These stores are located on OAB servers and public folder servers.

The capacity of public folder stores is limited to 1,000 mailboxes or folders. Errors result when you attempt to create more than 1,000 public folders or offline address books in a store.

You can associate the same public folder store with one or more mailbox stores. However, you cannot associate the same mailbox store with multiple public folder stores. Mailbox stores can be registered only once.

For more information, see the Hosted Exchange 2003 Help.

To add a resource to Ensim Unify:

1. Prepare the server and install the service software as instructed in the service's installation guide. **About preparing servers**

Before adding a resource, you need to join the hosting server to the domain and install the service software onto the server as described in installation guide for the service.

- *Before you add a resource, the host name of the server must be present in your system's DNS record. Usually, the host name is added when you join the server to the domain. However, if reverse zone lookup has not been enabled for your system, you cannot add the server until you either enable reverse zone lookup or add the record manually. For instructions on enabling reverse zone lookup, see the platform installation guide.*

2. If this is the first resource for the service, verify [the service is enabled](#) before you add the server. Some services are initially added in the disabled state.

Unless you disable the service later, you need to enable the service only after you initially install the service software, or plugins, on the platform servers. You do not need to enable the service each time you add a resource or hosting server.

3. Log in to the service provider control panel using a Systems account.
4. For hosting servers, start the add resource wizard. If you are simply adding a mailbox store resource to an existing set of mailbox stores, use the **add resource page for the mailbox store** instead of the add resource wizard. When adding this type of resource, you do not need to provide all the information listed here.

To go to the add page for a mailbox store:

1. On the top navigation bar, click **resources**.
2. Click the **resources** tab.
3. On the resources list, select the mailbox store whose information you want to change.
4. Click overview.
5. On the server overview page select the Hosted Exchange 2003 service, then click **overview**.
6. On the Service Component Instance Shortcuts page, click **View Configuration**.
7. Scroll down to the Exchange resource list section, then click **add** on the action bar above the list.

PROVIDE SERVER INFORMATION

5. On the Server Information form, provide the following information, then click **Next**.
 - **Host Name.** Required. The domain name or IP address of the server or resource you are adding.
 - **Description.** Optional. A description of the server. Any combination of characters and spaces is valid. This description is visible to resellers who buy the server, however, so make sure the description you provide is something you want resellers to see.
 - **Use in automatic allocation.** This check box determines whether the resource is available to the system for automatic selection when you add organizations or provision services.

If you clear this check box, the resource is not available. This is useful when you want to prevent the system from automatically using specific resources during provisioning.

If you check this box, and you select *automatic resource selection* when you provision an organization, this resource is available to the system for allocation.

You can always select resources manually during provisioning, regardless of whether this option is selected or cleared.

- If you are adding a dedicated mailbox store, you need to clear the **use in automatic allocation** check box. Dedicated mailbox stores are designed to be used by a single organization, so the system cannot automatically select them. If the automatic allocation is selected, the dedicated mailbox store cannot be added.

- **Resource Usage Warning Level.** Optional. The percentage of the server's resources at which warning messages are sent. The system determines the usage level by comparing the current usage to the actual resource limits as specified later in this wizard. The system does not independently verify the server's actual resources. When the server's usage reaches the warning level, email alerts are sent to the owner of the server and to the address specified on the Alerts page. This makes it possible to take action before server resources are exhausted. Valid input in this text box includes the whole numbers 0 - 100.
- **Pool Assignment.** Required. When you add a server, you need to assign it to a pool. Pools are used to manage groups of servers. To add the server to an existing pool, select **Add Server to Existing Pool**, then choose the pool from the drop-down list. To add the server to a new pool, select **Create Pool for Server**, then type a name for the new pool in the text box. The pool name is visible to resellers.
- **Service Installed on Server.** Required. Choose the service installed on the server. Only one service can be installed on a server, and only the services installed on the system are listed as available. For more information about installing services on the system, see the *Getting Started Guide for Service Providers* or the *Integration Framework Guide for Service Providers*.

PROVIDE SERVICE RESOURCE INFORMATION

6. Configure the resource and set resource limits for each component of the service, then click **Next**. For information about resource options for services, see the online Help for each service.

PROVIDE SERVICE CONFIGURATION INFORMATION

7. Provide any additional information required for the server or resource, such as frontend server information, then click **Next**. For more information about configuring service components, see the online Help for each service.

VERIFY INFORMATION

8. On the last page of the wizard, verify the resource and service information. To change information, click **Previous**. To add the server or resource, click **Finish**.

The hosting server or resource appears on the resources list. You can sell it or its resources to resellers and organizations immediately. If the service installed on the server does not appear on service reseller or organization selection forms, make sure you have [enabled the service](#). When you add a hosting server or resource for a new service, that service is added in the disabled state.

After you sell a server or resource to a reseller, that reseller becomes the resource owner. The owner has authority to change the server or resource information with the exception of the name and actual resources.

Adding administrator accounts

LOGIN LEVEL REQUIRED FOR THIS TASK: SYSTEMS

You add administrator accounts when you want to create user logins through which you or others can access your service provider control panel.

To add an administrator account:

1. **Go to the Add Administrator page.**

*On the top navigation bar, click **administration**, then click **add administrator**.*

2. On the Add Administrator form, provide the following information:
 - **Name.** Required. The name of the administrator. Names have to be at least 1 character in length; up to 128 characters are allowed. Names cannot include HTML tags.
 - **Username.** Required. The username the administrator will type when logging in to the control panel. Username requirements
 - **External Email.** Optional. An email address outside of this system at which the administrator can be reached.
 - **Password.** Optional. The password the administrator will type when logging in to the control panel. Password requirements
 - **Confirm Password.** Required only if password is specified. The password retyped.
3. Choose the administrator's role (required). Roles determine the features the administrator is permitted to access. Roles include:
 - Systems
 - Operations
 - Marketing
4. Click **Add**. The administrator's account is added and it appears on the Administrators page. Notify the administrator that the account is ready for use.

About setting general preferences

General preferences include these settings:

[Contact information](#)

[Alert settings](#)

[Email templates](#)

[Auto login reminder](#)

[Display name](#)

[Export/import](#)

[Action log](#)

How to get to the general preferences page

*On the top navigation bar, click **preferences**.*

Contact information settings

Contact information includes:

Name. The name of a contact person. This information is optional, and you can enter up to 128 characters.

Email. An email address at which the contact person can be reached. This email address is separate from the [Alerts address](#). If you want to use the same address for both of these email contacts, you need to edit them separately.

Phone. A telephone number for the contact person.

To change contact information, click **edit** at the bottom of the form, type the new information in the text boxes, then click **Save**.

Alert settings

The alerts setting shows the address to which system-level email alert messages are sent. These alerts are the email messages sent to resource owners such as resellers and organizations when pool usage warning levels are reached. Email alerts are sent when service providers [generate usage reports](#) (either manually or according to [a set schedule](#)). Resellers and organization administrators cannot manually update usage information.

About usage warning levels

Usage warning levels are the percentage of resource usage that triggers alerts. Service providers and resource owners set these levels when they manage pools and server resources. When a warning level is reached, email alerts are sent to resellers and organizations who own the resource so they can take action before resources are exhausted.

Email template settings

The email template settings determine the formats used when the system sends automated email messages. Automated messages include the welcome messages sent to new resellers, organizations, and users and warning messages about resource or quota levels. Options include:

Text. A simple format used for email. The text format is limited in that it cannot contain any formatting such as special fonts, font styles (such as bold and italic), indents, margins, or pictures. Plain text is the most portable format, however, because it is supported by nearly every application on every machine.

HTML. A format that uses HTML (hypertext markup language) coding. HTML supports text formatting, numbering, bullets, alignment, horizontal lines, pictures (including backgrounds), HTML styles, stationery, signatures, and linking to Web pages.

Email encoding. The method of converting characters for transmission through email. To display correctly, certain character sets require specific encoding. Choose from among the common encoding types or provide your own.

Auto login reminder settings

When you use auto login to access a control panel, a pop-up reminder is displayed. It enables you to confirm or cancel the auto-login, and it reminds you to click **Log Out** to return to your control panel when you are done.

If the box next to this setting is checked, The reminder is turned on. The pop-up is displayed whenever you use auto-login to access a control panel.

If the box is not checked, the reminder is turned off. The pop-up is not displayed.

By default, the auto-login reminder is turned on. You can change this setting at any time. The changes you make apply only to your control panel; they do not affect the settings of your resellers or organizations control panels.

Display name settings

The display name setting determines how organization usernames are stored by the Active Directory server. This property is used with service features such as the address book in Hosted Exchange 2003. Also, the display name preference determines how usernames are displayed on the organization's users list.

Options for this setting include:

Last Name First Name

First Name Last Name

Separator. You can choose what kind of character, space, or combination of characters and spaces you want to use to separate last name from first name. This is especially useful for languages that use special character sets.

Choose a *single space* for the names to display with only a space between them. To use special characters, click the radio button next to the text box, then type the characters in the box. Any combination of characters and spaces is allowed. By default, if you choose the text box, a comma (,) is used to separate the names.

Default settings

The default setting is First name Last name. After you add an organization, the organization administrator can change the display name preference for the organization any time.

How changes affect organizations

When users are added to organizations, their names are stored by the Active Directory server according to the current display name preferences. If you change the display name preferences in the service provider or reseller control panel, existing organizations user display names are not affected; their usernames are displayed either:

- according to the preferences in effect when they were created, or
- according to the preferences selected by the organization administrator.

However, if you change an existing user's properties, the new setting is applied to that user as well.

Changes made in the organization control panel

If you change the display name setting in the organization control panel, the change is applied to all existing users in the organization as well as to any new users that are created.

For organizations with many users, changing this setting at the organization level might take a long time.

You can change the display name preference any time.

Export/import settings

Export/import settings determine what action the system takes when you export or import organizations and users. You can change these settings at any time.

Export/import settings include:

Location. The server name and directory where configuration settings and data are exported to or imported from. Using Unify platform or hosting servers is not recommended; However, any Internet-accessible server with a shared folder that has full read and write permission to the MPFServiceAcct can be used for storing the export/import information. Specify the location using the UNC (uniform naming convention) for the server and directory. For example, \\<server_name>\<directory_name> where <server_name> is the host name of the server and <directory> is the path of the folder.

Site import export type. The settings for importing organizations. Settings include:

Config only. Export or import only the configuration settings of organizations and not the data associated with them. Configuration settings include the options selected while adding a new or editing an existing organization. For example, *selection of the Enable mailing lists flag in the IMAIL mail server service*. Choose this setting if you do not need the data associated with organizations or if you want to conserve server disk space.

Config and data. Export or import the configuration settings and all the service-specific data of organizations. Service-specific data includes the options and the files or directories created and managed by the organization administrator. For example, *the names of mailing lists*. Choose this setting if you want to capture all the information about organizations. Depending on the amount of data, this might require a great deal of server disk space.

User option. The type of users you want to export or import when you export or import organizations. This option is applied to the service provider level only. Resellers and organization administrators can specify their own options for exporting and importing users in their organizations. Settings include:

All Users. Export or import the information of all the users in the organization.

Admin Only. Export or import the information of only the default administrator for the organization.

Action log setting

The action log setting determines the number of days action log entries are kept. Use this setting to keep the size of the action log page and the size of the action log database manageable. Entries older than the specified number of days are automatically removed each day. Once removed, entries cannot be recovered.

If you choose *unlimited*, entries are never removed.

You can change this setting at any time, but the change does not take effect until the next automatic daily removal.

LOGIN LEVEL REQUIRED TO VIEW THIS PAGE: SYSTEMS

Branding the control panels

LOGIN LEVEL REQUIRED FOR THIS TASK: SYSTEMS

You can customize the look and feel of your customers' control panels to suit your preferences or to match your company's branding. This look and feel includes the logo, banner, colors, graphics, and styles used in your customers' control panels. You can [reload the default settings](#) at any time if necessary.

You can brand your customers' control panels only; you cannot brand your top-level control panel (the service provider control panel that is your primary login).

What you can change

[Banners and logos](#)

[Colors and graphics](#)

[Padding, spacing, and font sizing](#)

The URL of the control panel

Content (Service providers can add content to the organization control panel)

What you cannot change

Your top-level control panel

The title of the page displayed in the browser window

The positioning of elements on a page

About branding customer control panels

Your customers cannot change the branding of their top-level control panels. However, the system is designed so that they can override your settings and customize the control panels used by their customers (their resellers, organizations and users).

Your branding preferences are applied to reseller, organization and user control panels only if resellers and organizations have not added their own branding preferences. This preserves their ability to brand their customers' control panels.

When you add or change your branding preferences, those preferences are applied as follows:

| Control panel | How preferences are applied |
|---|---|
| Resellers and organizations you own | Your changes are always applied immediately. |
| Resellers and organizations owned by your resellers | Your changes are applied only if the reseller has not customized the reseller or organization control panels. |

| | |
|------------------------------|---|
| Users added by organizations | Changes are applied only if the organization administrator or reseller has not customized the user control panel. |
|------------------------------|---|

Changing the styles used in control panels

To change the colors, text, and general look and feel of control panels, follow these instructions:

Step 1. Download and modify the style sheet

1. Go to the branding files page.
2. If the style sheet has not been changed before, click **Download Current** by the style sheet you want to download. If the style sheet has been modified before and you want to modify the original, click **restore default**, then click **Download Current**.
3. Save this style sheet to your local system, then open the style sheet using your favorite editor.

Notice that the style sheet is empty except for a comment containing a URL. This URL points to the base style sheet for the system. Style sheets you modify and upload are loaded after the base style sheet; they override the base style sheet's styles.

4. Open a browser and download the base style sheet:
 - o In the browser's Address bar type the URL contained in the comment of the style sheet you just downloaded. Make sure to replace `<CP SERVER>` with the domain name of your control panel server.
 - o Click **Go**. The base style sheet is displayed.
 - o Save the base style sheet so you can refer to it later if necessary.
5. Using your favorite editor, open the base style sheet, copy the styles you want to override, and paste those styles into a new style sheet.

To determine which styles you want to override, you can save a page from the control panel to use as a source for finding page elements and associated CSS class names.

To do this, go to a page in the control panel and click **Save As** from the browser's File menu. This saves a page, such as `ISP_Admin.htm`, to your local machine. It also saves a folder, such as `ISP_Admin_files`, with any images or style sheets used to display the page.

The saved page is rewritten by Internet Explorer when it is saved so that all image and style sheet references point to the files in this new folder. You can open the file in Dreamweaver (or the text or HTML editor of your choice) to determine which styles you want to override.

- Any styles you add to the new style sheet take precedence over styles in the base style sheet, so copy only those styles you want to override.

6. In your new style sheet, change the styles you copied from the base style sheet as needed.
7. The base style sheet uses relative-path URL references to images in some styles. If you copied any of these styles to your new style sheet, you need to change them so that the references will be correct when you upload the new style sheet.

For example, the base style sheet uses the following two relative path image references in the style sheet:

background-image: url(images/menubar.gif)

background-image: url(../images/button_logout.gif);

These references are relative to **\$CPBaseDir/common/css/styles/blue** which is the folder where the base style sheet is stored (\$CPBaseDir by default is **c:\program files\Ensim\Ensim Unify\cp**). Customized style sheets are stored in a different folder, namely, **\$CPBaseDir/brandingfiles**.

For images to display correctly, change the relative path URLs in modified styles as follows:

For images specified as **url(images/)**, change the URL to **../common/css/styles/blue/images/**

For images specified as **url(../images/)**, change the URL to **../common/css/images/**

8. Save the new style sheet.

Step 2. Upload the modified style sheet

1. After you have obtained the styles, modified them, and saved them in a new style sheet, return to the branding files page.
2. In the Style Sheet section, click **Browse** next to the reseller, organization or user text box.
3. Navigate to the style sheet you modified, then click **Open**. To keep the current style sheet for a control panel, leave its text box blank.
4. Click **Upload Changes**. The style sheet is updated.
5. To view the changes, log in to the appropriate control panel. If you do not see the changes, your browser might be using a previously cached version of the style sheet. Refresh your browser's cache to view the changes (in Internet Explorer, press **Ctrl** while clicking the browser's refresh button).

Changes are not displayed in the control panel that is your primary login.

Change control panel banners

Banners are the graphics that appear at the top of the control panels in the long space to the left or right of the logo space. You can replace the banners in the reseller, organization, and user control panels you own with any other image that:

Has approximately the same dimensions as the default banner to ensure that control panel elements display correctly. The default banner is 1,650 pixels wide by 60 pixels tall. If a banner is too long to be displayed, it slides under the logo.

Is in .gif or .jpg format.

Is no larger than 46 KB in size.

To change the banners:

1. Go to the branding files page.
2. In the Banner section, click **Browse** next to the reseller, organization, or user control panel text box, then navigate to the file you want to use for the banner. You can use the same graphic or different graphics for each control panel.
3. Click **Open**.
4. To keep the current banner for any control panel, leave the text box blank.
5. Click **Upload Changes**.

The new banner appears in the control panel. To view it, log in to the appropriate control panel. If you do not see the change, your browser might be using a previously cached version of the banner. Refresh your browser's cache to view the change (in Internet Explorer, press **Ctrl** while clicking the browser's refresh button).

Changes are not displayed in the control panel that is your primary login.

Add your logo

The logo is the graphic to the left or right of the banner at the top of the control panel. You can replace the default logo with any graphic that:

Has approximately the same dimensions as the default graphic to ensure that interface elements display correctly. The default graphic is 157 pixels wide by 60 pixels tall.

Is in .gif or .jpg format.

Is no larger than 46 KB.

To upload your logo:

1. Go to the branding files page.
2. In the Logo section, click **Browse** next to the reseller, organization, or user control panel text box, then navigate to the file you want to upload. You can use the same graphic or different graphics for each control panel.

3. Click **Open**.
4. Next to Logo Position, choose **Left** to display the logo in the upper left of the control panel, or choose **Right** to display the logo in the upper right.
 - If you want to change the position of the logo, you need to navigate to the logo file as described in step 2; you cannot simply change the position by choosing left or right.
5. To keep the current logo for any control panel, leave the text box blank.
6. Click **Upload Changes**.

The graphic appears in the control panel. To view it, log in to the appropriate control panel. If you do not see the change, your browser might be using a previously cached version of the logo. Refresh your browser's cache to view the change (in Internet Explorer, press **Ctrl** while clicking the browser's refresh button).

Changes are not displayed in the control panel that is your primary login.

Reload default settings

You can reload the default style sheets, banners, and logos used in the control panels at any time. If you are the service provider who owns the Ensim Unify system, the defaults are the system's initial settings. If you are a reseller or organization administrator, the defaults are the settings currently used by your service provider; they might change if your service provider rebrands control panels.

To reload default settings:

On the branding files page, click **Restore Default** next to any item you want to reload.

Adding reseller templates

LOGIN LEVEL REQUIRED FOR THIS TASK: SYSTEMS OR MARKETING

Reseller templates are guides you can use to pre-fill information on forms when you add resellers. You can add as many reseller templates as necessary to meet your business needs.

If you are a reseller, you can add reseller templates only if you see the reseller link on the top navigation bar. Only your service provider can enable this feature.

To add a reseller template:

1. Start the add reseller template wizard.

RESELLER TEMPLATE INFORMATION

2. On the template information form, provide the following information, then click **Next**.
 - **Name.** Required. The name you want to give to the template. For example, if the template has high-end resources and services, you might call it Gold. If it has low-end resources and services, you might call it Bronze. Resellers added with this template see this name on their account information page. Names must be between 1 and 128 characters in length.
 - **Description.** Optional. A description of the template. This is for your information only; resellers added with this template see this name on their account information page. Up to 512 characters, including special characters and spaces, are allowed.
 - **Reseller Enabled to Create Resellers.** Optional. Select the check box to allow resellers added with this template to add their own resellers. This option cannot be disabled after the reseller is added.

SELECT SERVICES

3. On the available services form, select the check boxes of the services you want to make available to the reseller, then click **Next**. All services available on your system appear on this form.

RESOURCES AND SERVICE OPTIONS

4. On the resources form, select the pool, or resource (server) group, you want to take resources from when using this template to add resellers. The required server capacity is taken from the selected pool when you add the reseller.
5. On the services form, choose the service options for each service you selected, then click **Next**. For service options, see the service-specific online Help.

VERIFY INFORMATION

6. Review the summary information. To make changes, click **Previous**. To add the template, click **Finish**.

The template is added and displayed on the reseller templates page. You can begin using it to add resellers immediately.

Adding resellers

LOGIN LEVEL REQUIRED FOR THIS TASK: SYSTEMS OR OPERATIONS

You add a reseller when you want to give a customer the ability to log in to the reseller control panel to sell server resources or services to their customers.

If you are a reseller, you can add resellers only if you see the reseller link on the top navigation bar. Only your service provider can enable this feature.

To add a reseller:

1. Start the add reseller wizard.

PROVIDE RESELLER INFORMATION

2. On the reseller information form, provide the following information, then click **Next**.

- **Name.** Required. The name of the reseller. This name appears on the reseller's account information. Names have to be at least one character in length and they can include spaces. They cannot include HTML tags, however. Up to 63 characters are allowed.
- **Domain Name.** Required. The name of a domain that belongs to the reseller. Up to 63 characters are allowed. Type the domain name in the following format: *example.net*.
- **Reseller Template.** Optional. The template you want to use when adding the reseller. If you have [added a template](#), you can select it from the drop-down list to pre-fill information on the add reseller wizard. Only enabled templates appear on the list; disabled templates are not available for selection.
- **Name.** Optional. The name of the contact person at the reseller. Any input in this text box is valid. There is no character limit for the name.
- **Email.** Required. An email address of the contact person at the reseller. This address is used when the system sends automated email messages about new accounts and resources. The address should be in standard email format, such as *username@example.com*.
- **Phone.** Optional. A telephone number at which you can reach the contact person. This number is for your information only; any input in this text box is valid.

CREATE CONTROL PANEL ACCOUNT

3. On the administrator account information form, provide the information required to create the administrator account for the reseller control panel, then click **Next**. Information includes:
 - **Administrator Name.** Required. The name of the person who will use the reseller control panel administrator account. Names have to be at least one character in length.

- **Username.** Required. The username the administrator will type when logging in to the reseller control panel. The reseller's domain name is appended to this username. Username requirements
- **Password.** Optional. The password the administrator will type when logging in to the reseller control panel. Password requirements
- **Confirm Password.** Required if password is specified. The password retyped.
- **External Email.** Optional. An email address outside this system at which you can reach the administrator.

CHOOSE RESELLER OPTIONS

4. On the reseller options form, choose the options you want to enable for the reseller, then click **Next**. Options include:
 - **Enable Reseller to Create Resellers.** Select this check box to allow the reseller to add resellers. If you clear this check box, resellers cannot add resellers; they can create organizations only. If you enable this option, you cannot change it after you add the reseller.

SELECT SERVICES

5. Choose the services you want to make available to the reseller, then click **Next**. All services available on your system appear on this form.
 - To sell a dedicated server to a reseller, add the reseller, then add the server to the reseller's resources.

CHOOSE SERVICE AND RESOURCE OPTIONS

6. On the pool information form, select the pool from which you want to provision the service. You select the pool only; the server is chosen from among the servers in the pool. For some services, you can move the service to another server after you add the reseller if necessary.
7. On the service form, choose the service resources you want to make available to the reseller, then click **Next**. For reseller service options, see the service-specific online Help.

VERIFY INFORMATION

8. Review the information about the reseller. To make changes, click **Previous**. To add the reseller, click **Finish**.

The reseller is added and is displayed on the resellers page. If you enabled the reseller control panel login and services, the reseller can log in and begin to resell resources or services immediately. If you supplied an email address for the reseller, an email message is automatically sent notifying the contact person that the reseller account is enabled. See the Email templates page for more information about automated messages.

After you add a reseller, you can log in automatically to the reseller's control panel.

Adding organization templates

LOGIN LEVEL REQUIRED FOR THIS TASK: SYSTEMS OR MARKETING

Organization templates are guides you can use to pre-fill information on forms when you add organizations. You can add as many organization templates as necessary to meet your business needs.

To add an organization template:

1. Start the **organization template wizard**.

GENERAL INFORMATION

2. On the general information form, provide the following information, then click **Next**.
 - **Template Name.** Required. The name you want to give to the template. For example, if the template has high-end resources and services, you might call it Gold. If it has low-end resources and services, you might call it Bronze. Names must be between 1 and 128 characters in length.
 - **Description.** Optional. A description of the template. This is for your information only; organizations added with this template see this name on their account information page. Up to 512 characters, including special characters, are allowed.

SELECT SERVICES

3. Choose the services you want to make available to organizations created with this template, then click **Next**.

SELECT RESOURCES AND SERVICE COMPONENT PROPERTIES

4. Select the pool, or resource (server) group, you want to use when using this template to add organizations. The drop-down list displays all available pools. The required server resources are taken from the selected pool when you add the organization.
5. Configure any services you enabled through the template, then click **Next**. For service configuration options, see the online Help for the service.

REVIEW TEMPLATE

6. Review the information you provided for the template. To change information, click **Previous**. To add the organization template, click **Finish**.

The organization template is now available and you can use it when you [add an organization](#).

Adding organizations

LOGIN LEVEL REQUIRED FOR THIS TASK: **SYSTEMS OR OPERATIONS**

You add organizations when you want to set up an account and sell services to a user or a group of users.

To add an organization:

1. Start the add organization wizard.

ORGANIZATION INFORMATION

2. Provide the following general organization information, then click **Next**. Only the default fields are described below. The form might contain additional information if the wizard has been customized:
 - **Organization Name.** Required. The name of the organization. Names have to be at least one character in length and they can include spaces. They cannot include HTML tags, however. Up to 128 characters are allowed.
 - **Organization Domain Name.** Required. The domain name of the organization. Enter the domain name in the following format: *example.net*. In addition to the top-level domain characters, such as *.com*, the domain name can be up to 63 characters in length.
 - **Template.** Optional. The template you want to use when adding the organization. If you have [added a template](#), you can select it from the drop-down list to pre-fill information on the add organization wizard. Only enabled templates appear on the list; disabled templates are not available for selection.
 - **Name.** Optional. The name of the contact person at the organization. Any input in this text box is valid. There is no character limit for the name.
 - **Email.** Required. An email address of the contact person at the organization. This address is used when the system sends automated email messages about new accounts and resources. The address should use standard email format, such as *username@example.com*.
 - **Phone.** Optional. A telephone number at which you can reach the contact person. This number is for your information only; any input in this text box is valid.

CREATE CONTROL PANEL ACCOUNT

3. Create the administrator account by providing the following information, then click **Next**:
 - **Administrator Name.** Required. The name of the person who will use the organization control panel administrator account. Names have to be at least one character in length and they can include spaces.

- **Username.** Required. The username the administrator will type when logging in to the organization control panel. The organization's domain name is appended to this username. Username requirements
- **Password.** Optional. The password the administrator will type when logging in to the organization control panel. Password requirements
- **Confirm Password.** Required if password is specified. The password retyped.
- **External Email.** Optional. An email address at which you can reach the administrator.

SELECT SERVICES

4. Select the check boxes of services you want to enable for the organization, then click **Next**. To add the organization without adding services, leave the check boxes blank.

SERVICE INFORMATION

5. Choose the options you want to use for each service you selected, then click **Next**. Options include:

Resource information

- **Pool.** The resource (server) group you want to use when provisioning the organization. The required server capacity is taken from the selected pool when you add the organization.
- **Resource Selection.** The method you want to use to select the server resources available to the organization. There are two types of resource selection:
 - **Automatic.** Choose this to allow the system to select from available resources automatically. Only those resources marked as auto-allocatable are available for automatic selection. You can view the auto-allocation settings on the resource's detail page.
 - **Manual.** Choose this to select the resource you want to use from the drop-down list. If you are adding a large organization and you want to assign a dedicated resource to it, you need to use manual selection. Dedicated resources, which can be used by only one organization, are not available for automatic selection. If you choose manual selection, complete the resource information for the service, then click **Refresh**. The system refreshes the resource information, then displays the resources in the pool that meet your requirements.

You might be able to move the organization services to another server later if necessary, depending on the service.

- **If using manual selection, choose resource.** If you select manual resource selection, choose the resource you want from the updated list. Make sure to enter your resource requirements, then click **Refresh** before selecting a resource.

SERVICE-SPECIFIC INFORMATION

6. For each service you are adding, select the checkbox of the component, then select service resource options. For service options, see the online Help for each service.

VERIFY ORGANIZATION INFORMATION

7. Verify the information about the organization. To make changes, click **Previous**. To add the organization, click **Finish**. The organization is available for use as soon as it is added.

After you add an organization, you can log in automatically to the organization's control panel. If you supplied an email address for the organization, an email message is automatically sent notifying the contact person that the organization is enabled. See the email templates page for more information about automated messages.

If you want to create a backup of the organization's settings, you can export the organization.

About usage reports

Usage reports provide data about the services installed on your system and about the resellers and organizations using your services. Use these reports to monitor service usage and to ensure proper billing for services.

How usage data is updated

For services such as Hosted Exchange 2003, real-time usage data is not always available. This is because each service collects usage data and provides it to the platform [according to the service's usage collection process](#). The platform retrieves this data and displays it in the control panel when:

[You update data manually](#)

[Automatic data collection runs](#)

To determine data freshness, you need to understand [how services collect usage data](#).

Resellers and organization administrators can view usage data, but they cannot update it.

Types of reports

You can view the following types of usage reports:

[Usage summaries](#). A summary of your services and the number of resellers and organizations using those services.

[Reseller reports](#). Detailed information about the resellers selling your services. This is available only if you are authorized to create resellers.

[Organization reports](#). Detailed information about the organizations using your services.

[Exported reports](#). Comma-separated value versions of reports. You can download data from these reports and import it into spreadsheets and other data management programs as needed.

How services collect usage data

Each service is responsible for providing usage data to the platform. For some services, such as DNS, the usage data is continuously updated; real-time usage data is always available.

For services with more complex usage data, such as Hosted Exchange 2003, the usage data is collected according to a schedule. As a result, the usage data available to the system might or might not be real-time data, depending on the service's data collection methods and scheduling.

For more information about service data collection, see the service-specific Help:

Updating usage data

LOGIN LEVEL REQUIRED FOR THIS TASK: SYSTEMS

Service providers with Systems logins can manually update usage data at any time. However, for some services, such as Hosted Exchange 2003, manually updating the usage data does not collect real-time data-usage statistics. This is because services collect usage data and provide it to the platform SQL server according to their own schedule.

Administrators with Operations or Marketing logins, resellers, and organization administrators, however, cannot update usage information.

To update usage information:

1. On the reports navigation panel, click **Usage**. The Usage Summary page is displayed.
2. On the Action bar at the top of the Usage Summary page, click **Update**.
3. In the dialog box, click **OK**.
4. A progress page is displayed. Click **OK** to continue using the control panel for other tasks.
5. You can view the Action Log page to check the status of the update. If the system detects any problems with hosting servers or other system elements, the Action Log shows the status of the update as Failed. For information about which server or system element failed, view the action log detail.

About alerts

Resource thresholds are checked and warning messages are sent whenever you update usage information. This means that resource owners and users who have reached disk-space threshold limits might receive messages when you update usage information.

Scheduling automatic usage data updates

By default, the system does not automatically update the usage data displayed in the control panel. If you want automatic updates at specific intervals, you can schedule them.

During automatic updates, the platform simply obtains the latest usage data from the platform SQL server and displays it in the control panel. For some services, such as DNS, this is real-time usage data. For other services, such as Hosted Exchange, this data might not be real time. The Hosted Exchange service has its own scheduled tasks that collect usage data and update the platform SQL server periodically.

To schedule automatic usage data updates:

1. Log in to the SQL server as domain administrator.
2. Click **Start > Programs > Microsoft SQL Server**, then click **Enterprise Manager**.
3. Select your SQL server, then expand **Databases**.
4. On the database list, select **Ensim_WVH_Configuration**.
5. Expand the Tables list.
6. On the Tables list, right-click **CronJob**, point to **Open Table**, then click **Return All Rows**.
7. Click the bottom cell of the table to add a row, then insert the following information in the columns of the new row:
 - Leave the first column, the ID, blank. The system completes this column.
 - In the Name column, type the following name: **UsageMonitor**.
 - In the Interval column, enter the frequency of the usage collection task, in seconds. For instance, if you want the task to run once every day, type 86400 (24 hours x 60 minutes x 60 seconds = 86,400). If you want to run the task once every hour, type 3600 (60 minutes x 60 seconds = 3,600). Since the data collection task is resource intensive, set the interval to no less than 3600 seconds (once every hour).
 - In the Last Run column, type the current date and time.
 - Press Tab twice to enter **Null** for the last two columns of the row.
8. Save and close the table.
9. Stop the Provisioning Engine COM+ service:
 1. Log on to the Provisioning Engine (PE) server as domain administrator.
 2. On the PE server, click **Start > Programs > Administrative Tools**, then click **Component Services**.

3. In the left navigation bar, expand **Component Services** > **Computers** > **My Computer** > **COM+ Applications** > **Provisioning Engine**.
4. Right-click **Provisioning Engine**, then click **Shut down**.

When you log in to the control panel, the Provisioning Engine COM+ service is restarted. Usage data is automatically updated on the usage summary page at the interval you specified.

Viewing summary usage reports

LOGIN LEVEL REQUIRED FOR THIS TASK: SYSTEMS, OPERATIONS, OR MARKETING

Summary usage reports show the resellers and organizations using the resources and services available through your system. Usage information is updated when service providers [generate reports](#) (either manually or according to [a set schedule](#)).

To view the summary usage report:

On the top navigation bar, click reports, then click the **Usage** tab. The Usage Summary page is displayed.

Viewing reseller usage reports

LOGIN LEVEL REQUIRED FOR THIS TASK: SYSTEMS, OPERATIONS, OR MARKETING

Reseller usage reports provide information about all of the resellers below you in your system. This includes your immediate resellers and all of the resellers under them. Usage information is updated when service providers [generate reports](#) (either manually or according to [a set schedule](#)).

To view a reseller usage report:

1. On the top navigation bar, click **Reports**, then click the **Usage** tab.
2. On the action bar above the summary information, click **Resellers**.

The current reseller usage information is displayed.

Viewing organization usage reports

LOGIN LEVEL REQUIRED FOR THIS TASK: SYSTEMS, OPERATIONS, OR MARKETING

Organization usage reports provide information about all of the organizations below you in your system. This includes organizations you add, as well as all the organizations added by all the resellers below you in your system. Usage information is updated when service providers [generate reports](#) (either manually or according to [a set schedule](#)).

To view an organization usage report:

1. On the top navigation bar, click **reports**.
2. Click the **Usage** tab.
3. On the action bar above the summary information, click **organization usage**.

The current organization usage reports page is displayed.

Downloading usage reports

LOGIN LEVEL REQUIRED FOR THIS TASK: SYSTEMS, OPERATIONS, OR MARKETING

Usage reports provide statistical information about system usage in a comma-separated value (CSV) format. In this format, all of the information, such as the number of services and the number of components, is provided in a list with each value separated by a comma.

You can download usage reports to your local system, then import them into spreadsheets and other data collection programs. Also, depending on your contract agreement, you might be required periodically to email these reports to Ensim at finance@ensim.com.

Downloading usage reports does not collect real-time data. It simply enables you to download the most recent report.

To download a usage report:

1. On the top navigation bar, click **Reports**, then click the **Usage** tab.
2. On the usage summary page, click **Export Reports**.
3. Click **Download** across from the type of report you want. If the report cannot be downloaded, a status message is displayed.
4. In the File Download dialog box, click **Save**.
5. In the Save As box, choose where you want to save the file to, then click **Save**.

For information about importing the CSV report into spreadsheets and other programs, see the documentation for those programs.