Understanding Partner Administration

This section includes the following topics:

- About Enterprise Vault.cloud partner administration
- Revision history
- About customers, partners, and provisioning
- About alliance partners and OEM partners

About Enterprise Vault.cloud partner administration

Revision history

The following table lists the revision history for this guide.

Table: Partner Administration Guide revision history

DOCUMENT ISSUE DATE	CHANGE
September 2022	This guide has been updated as the Partner Management node and Reports and Notifications node user interface is updated.
	Before September 2022 release, the My Config node comprises three tabs, namely Partner Details , White Labeling , and Admin Accounts . With this release, the White Labeling tab is deprecated.
	The Partner Dashboard , Partner Report , and Report Subscriptions nodes are moved under the Reports and Notifications node.
December 2015	-
May 2015	-

DOCUMENT ISSUE DATE	CHANGE
February 2015	First publication in this format.

About customers, partners, and provisioning

The terms customer, partner, and provisioning have specific meanings in the context of Enterprise Vault.cloud:

- Provisioning refers to the creation of new instances of email archives, and the configuration of primary and secondary services in Enterprise Vault.cloud. Provisioning also encompasses providing all of the necessary archive software and access permissions.
- A customer is a company that receives an Enterprise Vault.cloud archive and archive services for its own use.

A customer can access the Archive Administration tab in the Administration Console, from where it can manage its own archive users and services, and generate reports.

- A partner can resell Enterprise Vault.cloud services, and has the rights to manage customer archives created under the partner group on behalf of customers. A partner may or may not also be a customer. A child partner resells archive services, and is managed by its parent partner. A partner customer is the customer of a child partner.

Note: A partner cannot create child partners or customers under its own instance, and it cannot add or remove services. These actions require an order to be placed through Veritas.

A partner or child partner can access the following tabs of the Administration Console, subject to the services it is licensed for.

PARTNER MANAGEMENT TAB	-
Customer Service tab	Provides access to the Customer Service tool, for provisioning and managing customers.

PARTNER MANAGEMENT TAB	-
Archive Administration tab	Provides access to the Archive Administration tool, for managing your company's own archive.

> “ ”

Note: The tools and options that are available to you also depend on the administration roles that are assigned to the Enterprise Vault.cloud administrator account with which you access the Administration Console.

> “ ”

About alliance partners and OEM partners

Enterprise Vault.cloud customer service representatives can configure two types of partner:

- An alliance partner is a company that resells Enterprise Vault.cloud services to customers on behalf of a parent company, with the parent company responsible for customer support. Most partners are configured as alliance partners.
- An OEM partner is a company that resells the Enterprise Vault.cloud product under the partner's own branding.

Using the Partner Management Tool

This section includes the following topics:

- About the Partner Management tool
- Accessing the Partner Management tool

About the Partner Management tool

About the Partner Management tool

> “ ”

Note: Activities that are performed in the Partner Management tool are not logged, and are not available for review.

> “ ”

Accessing the Partner Management tool

To access Partner Management you must use a web browser that the Enterprise Vault.cloud Administration Console web application supports. For information about the supported web browsers, see the Enterprise Vault.cloud Compatibility List.

To access the Partner Management tool you require the credentials of an Enterprise Vault.cloud administrator account that is assigned a Partner Management administration role. The Partner Management administration roles allow access to the areas of Partner Management that are required to perform a particular administration function.

See About administration roles.

To access the Partner Management tool

1. In a supported web browser, enter your Enterprise Vault.cloud administration URL.

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Note: Ask your Enterprise Vault administrator if you do not know the administration URL, or if you need access permission.

> “ ”

2. On the Login page, select a security option:

THIS IS A PUBLIC OR SHARED COMPUTER	THE ADMINISTRATION CONSOLE PROMPTS YOU FOR YOUR CREDENTIALS EACH TIME YOU ACCESS THE LOGIN PAGE AND AUTOMATICALLY LOGS YOU OUT AFTER A SET PERIOD OF INACTIVITY.
	THIS OPTION IS THE DEFAULT OPTION.
This is a private computer	The Administration Console caches your credentials for one year and lets you bypass the Login page for the current browser session after you log in successfully.
	To clear your credentials from the cache, log out of the Administration Console.

3. Enter your Enterprise Vault.cloud administrator account user name and password.
4. Click **Log In**.

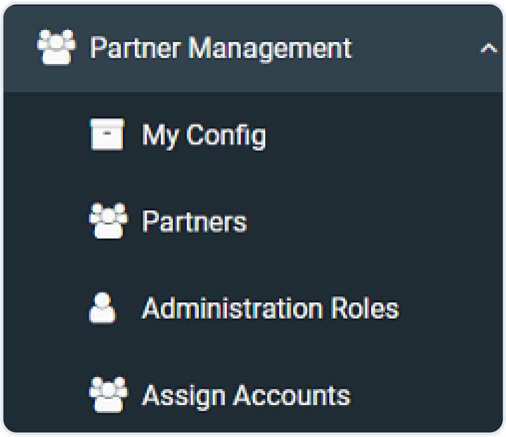
> “ ”

Note: After five consecutive incorrect password tries, an account is locked out of the Administration Console. You can reset your password at any time with theForgot Passwordlink on the login screen. Enterprise Vault.cloud emails a new password to the account's primary email address. You may have access to multiple areas of the Administration Console, depending on your account permissions. If the Partner Management tool is not your default view in the Administration Console, in the left navigation pane, clickPartner Management.

> “ ”

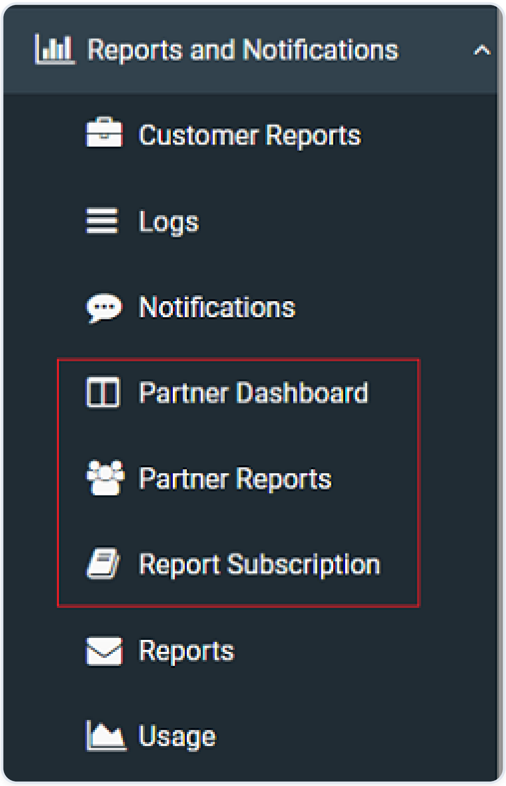
5. To perform partner management-specific operations, in the left navigation pane, click **Partner Management**.

The following sub-nodes appears.



1. To generate and export partner-specific reports, in the left navigation pane, click **Reports and Notifications**.

The following highlighted nodes are used.



Managing Personal Configuration (My Config)

This section includes the following topics:

- About the Partner Management My Config page
- Viewing the partner details for your own company
- Adding and modifying administrator accounts for your company

About the Partner Management My Config page

The My Config page of Partner Management provides information about your own partner company, its settings, and its administrators. If you have the required administrator permissions you can create and edit administration accounts for this partner.

Viewing the partner details for your own company

You can view details about the partner settings for your own company on the My Config page of Partner Management.

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Note: Apart from theSession Timeoutvalue, these settings are displayed for information only. Only a parent partner administrator can change these settings.

> “ ”

To view the partner details for your own company

1. In the left navigation pane, select **Partner Management**>**My Config**.

The Partner Details tab is displayed by default. This tab shows information about your own partner company as described in the table below.

Partner Details:

PARTNER NAME	THE PARTNER NAME FOR YOUR COMPANY.
Partner Type	Indicates whether you are an Alliance partner or an OEM partner.
	See About alliance partners and OEM partners .
Is Active	Indicates whether this partner is active. An inactive partner cannot access their archive or the Administration Console, although this setting does not affect the partner's customers.
Advance Service Provider	Indicates whether this partner is advance service provider.
Allow Edit Services	-
Session Timeout	Lets you set a session time-out period for the Administration Console, for security purposes. The value determines the period of inactivity after which Enterprise Vault.cloud logs out a user, if they logged in with the option This is a public or shared computer .
	If you do not set a value, Enterprise Vault.cloud uses a default value of 60 minutes.
Cross-Ref ID	Your company's own optional identifier for this partner, if one was configured.
Primary Domain Name	The primary domain name for the partner. The primary domain name uniquely identifies the company or partner in the system.
Default Date Format	The default date format for the partner. A customer administrator can change the date format if they want.

Privileges:

ENABLE IMAP/POP3 CONFIGURATION	THIS FEATURE IS NOT CURRENTLY SUPPORTED.
Customer's Privileges	Determines what customer administration tasks the partner is allowed to perform\:
	- Add Customer - Able to add new customers. (This option is not available to Veritas's partners.)
	- Edit Customer - Able to edit the settings of the existing customers.
	- View Customers - Able to view the details of the customers that the partner has provisioned.
Partner's Privileges	Determines which partner administration tasks the partner is allowed to perform\:
	- Add Partner - Able to add new child partners. (This option is not available to Veritas's partners.)
	- Edit Partner - Able to edit the settings of the existing child partners.
	- View Partners - Able to view the details of the child partners that the partner has provisioned.

Primary Services:

PERSONAL ARCHIVE	ALLOWS AN ADMINISTRATOR TO DEPLOY PERSONAL.CLOUD AND CREATE NEW ARCHIVES.
Advanced eDiscovery	Allows an administrator to designate Discovery.cloud reviewers.
Email Continuity	Allows the configuration of the optional Enterprise Vault.cloud Email Continuity service for the partner.

PERSONAL ARCHIVE	ALLOWS AN ADMINISTRATOR TO DEPLOY PERSONAL.CLOUD AND CREATE NEW ARCHIVES.
Advanced Supervision	Allows an administrator to designate Advanced supervisory reviews.
Merge1	Allows an administrator to designate Merge1 reviews.

Secondary Services:

EXCHANGE FOLDER SYNCHRONIZATION	ENABLES THE CONFIGURATION OF THE OPTIONAL ARCHIVETOOLS FOLDER SYNC APPLICATION. IF YOU SELECT THIS SERVICE, THE ACTIVE FOLDER SYNCHRONIZATION OPTIONS BECOME AVAILABLE ON THE ARCHIVING OPTIONS TAB TO LET YOU ENABLE OR DISABLE FOLDER SYNC.
Office 365 Personal Archive Collection	Enables the configuration of the optional Office 365 Personal Archive Collection feature.
Veritas Information Classifier	Enables support to analyze the emails to assign classifications tags.
Exchange Online Folder Synchronization	Enables support for Exchange Online Folder Synchronization.
Microsoft Teams Archiving	Enables support for archiving Microsoft Teams chats and channel messages.
Bloomberg Archiving	Enables support for the archiving of Instant Bloomberg and Bloomberg messages.
OneDrive for Business Archiving	Enables support for archiving items from OneDrive for Business.

Merge1 Secondary Services

ALL THE AVAILABLE MERGE1 SECONDARY SERVICES	ENABLES SUPPORT FOR ARCHIVING ITEMS FROM ALL THE AVAILABLE MERGE1 SERVICES.

Email Continuity Options:

EMAIL CONTINUITY METHODS	SPECIFIES THE METHODS THAT ENTERPRISE VAULT.CLOUD USES TO MAINTAIN EMAIL CONTINUITY.
	NOTE: THIS SECTION IS DISPLAYED ONLY IFEMAIL CONTINUITYIS SELECTED INPRIMARY SERVICES.

System Details :

CREATED BY	THE CREATOR OF THE PARTNER ARCHIVE INSTANCE.
Created On	The date and time when the partner archive instance was created.
Last Modified By	The partner account that last modified the partner settings.
Last Modified On	The date and time when the partner settings were last modified.

1. If the session timeout duration is modified, click **Save**.

Adding and modifying administrator accounts for your company

You can add new Partner Management administrator accounts for your company and determine the areas that a Partner Management administrator can access on the Administration Console.

> “ ”

Note: These instructions are for configuring Partner Management administrator accounts for your own company, not for your child partners or customers.

> “ ”

To add an administrator account for your company

1. In the left navigation pane, select **Partner Management**>**My Config**.

The Partner Details tab is displayed by default.

1. Click the Admin Accounts tab.

The Admin Accounts page displays details of the existing configured accounts.

> “ ”

Note: The primary administrator accounts are not displayed by default. You cannot normally edit the permissions of a primary administrator account.

> “ ”

1. Click **Add New**. On the**Add Account** page, specify the following details.

FIRST NAME	ENTER THE FIRST NAME OF THE USER.
Last name	Enter the last name of the user.
Primary email address	Enter the email address of the user. If your company has more than one domain configured, select the required domain from the drop-down list.
User name	This box displays the account user name, which corresponds to the primary email address you specified.
Auto Generate Password	By default Enterprise Vault.cloud generates a new password automatically and sends it to the account's primary email address.
	Uncheck to specify a password of your choice.

2. Click **Save** to create the new partner administrator account.

Partner Management adds the new partner administrator to the table of administration accounts.

1. Find the new administrator in the table of administrator accounts. Then, in the table row for the new administrator, select or clear the check boxes to define which areas of the Administration Console the administrator can access:

   - **Customer Manager** : Can access Customer Service, with the Customer Manager administration role.
   - **Partner Manager** : Can access Partner Management, with the Partner Manager administration role.
   - **Archive Admin** : Can access Archive Administration, with the System Administrator administration role.

2. Click **Save**.

Managing Partners

This section includes the following topics:

- About managing partners
- Viewing and editing partner's details
- Creating and editing administrator accounts for a partner

About managing partners

You can use the Partner Management component of the Administration Console to view information about your child partners. If you have the required privileges you can also edit the child partner details, and create and modify administrator accounts for the child partners.

Viewing and editing partner's details

You can view a list of your company's child partners, and modify some of those partner's details.

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Note: Only provisioner with the required administrator permissions can access Partner Management and edit partner details.

> “ ”

To view and edit partner details

1. In the left navigation pane, select **Partner Management**>**Partners**.

The summary of the available child partners is displayed.

- To navigate through the list, use the navigation tools at the bottom of the list.
- To view a specific number of child partners per page, select any option from the **Items per page** drop-down list.
- To search for a partner in the list, type a word or phrase in the Search field above the partner list, and press **Enter**or click the**Search** icon.

- To clear the search results, remove the text from the Search box and press Enter.

1. To view and edit the details of a partner, click the row for that partner.

The Partner Details tab is displayed by default. This tab shows information about your own partner company as described in the table below.

Partner Details:

PARTNER NAME	THE PARTNER NAME FOR YOUR COMPANY.
Partner Type	Indicates whether you are an Alliance partner or an OEM partner.
	See About alliance partners and OEM partners .
Is Active	Indicates whether this partner is active. An inactive partner cannot access their archive or the Administration Console, although this setting does not affect the partner's customers.
Advance Service Provider	Indicates whether this partner is advance service provider.
Allow Edit Services	-
Session Timeout	Lets you set a session time-out period for the Administration Console, for security purposes. The value determines the period of inactivity after which Enterprise Vault.cloud logs out a user, if they logged in with the option This is a public or shared computer .
	If you do not set a value, Enterprise Vault.cloud uses a default value of 60 minutes.
Cross-Ref ID	Your company's own optional identifier for this partner, if one was configured.
Primary Domain Name	The primary domain name for the partner. The primary domain name uniquely identifies the company or partner in the system.

PARTNER NAME	THE PARTNER NAME FOR YOUR COMPANY.
Default Date Format	The default date format for the partner. A customer administrator can change the date format if they want.

Privileges:

ENABLE IMAP/POP3 CONFIGURATION	THIS FEATURE IS NOT CURRENTLY SUPPORTED.
Customer's Privileges	Determines what customer administration tasks the partner is allowed to perform\:
	- Add Customer - Able to add new customers. (This option is not available to Veritas's partners.)
	- Edit Customer - Able to edit the settings of the existing customers.
	- View Customers - Able to view the details of the customers that the partner has provisioned.
Partner's Privileges	Determines which partner administration tasks the partner is allowed to perform\:
	- Add Partner - Able to add new child partners. (This option is not available to Veritas's partners.)
	- Edit Partner - Able to edit the settings of the existing child partners.
	- View Partners - Able to view the details of the child partners that the partner has provisioned.

Primary Services:

PERSONAL ARCHIVE	ALLOWS AN ADMINISTRATOR TO DEPLOY PERSONAL.CLOUD AND CREATE NEW ARCHIVES.
Advanced eDiscovery	Allows an administrator to designate Discovery.cloud reviewers.
Email Continuity	Allows the configuration of the optional Enterprise Vault.cloud Email Continuity service for the partner.
Advanced Supervision	Allows an administrator to designate Advanced supervisory reviews.
Merge1	Allows an administrator to designate Merge1 reviews.

Secondary Services:

EXCHANGE FOLDER SYNCHRONIZATION	ENABLES THE CONFIGURATION OF THE OPTIONAL ARCHIVETOOLS FOLDER SYNC APPLICATION. IF YOU SELECT THIS SERVICE, THE ACTIVE FOLDER SYNCHRONIZATION OPTIONS BECOME AVAILABLE ON THE ARCHIVING OPTIONS TAB TO LET YOU ENABLE OR DISABLE FOLDER SYNC.
Office 365 Personal Archive Collection	Enables the configuration of the optional Office 365 Personal Archive Collection feature.
Veritas Information Classifier	Enables support to analyze the emails to assign classifications tags.
Exchange Online Folder Synchronization	Enables support for Exchange Online Folder Synchronization.
Microsoft Teams Archiving	Enables support for archiving Microsoft Teams chats and channel messages.
Bloomberg Archiving	Enables support for the archiving of Instant Bloomberg and Bloomberg messages.

EXCHANGE FOLDER SYNCHRONIZATION	ENABLES THE CONFIGURATION OF THE OPTIONAL ARCHIVETOOLS FOLDER SYNC APPLICATION. IF YOU SELECT THIS SERVICE, THE ACTIVE FOLDER SYNCHRONIZATION OPTIONS BECOME AVAILABLE ON THE ARCHIVING OPTIONS TAB TO LET YOU ENABLE OR DISABLE FOLDER SYNC.
OneDrive for Business Archiving	Enables support for archiving items from OneDrive for Business.

Merge1 Secondary Services

ALL THE AVAILABLE MERGE1 SECONDARY SERVICES	ENABLES SUPPORT FOR ARCHIVING ITEMS FROM ALL THE AVAILABLE MERGE1 SERVICES.

Email Continuity Options:

EMAIL CONTINUITY METHODS	SPECIFIES THE METHODS THAT ENTERPRISE VAULT.CLOUD USES TO MAINTAIN EMAIL CONTINUITY.
	NOTE: THIS SECTION IS DISPLAYED ONLY IFEMAIL CONTINUITYIS SELECTED INPRIMARY SERVICES.

System Details :

CREATED BY	THE CREATOR OF THE PARTNER ARCHIVE INSTANCE.
Created On	The date and time when the partner archive instance was created.
Last Modified By	The partner account that last modified the partner settings.
Last Modified On	The date and time when the partner settings were last modified.

1. If you have modified the details, click Save tab.

Creating and editing administrator accounts for a partner

If you have appropriate permissions, you can create administrator accounts for a partner to use when it performs partner management tasks. Partner Administrators with the required permissions can also create their own administrator accounts.

- See “To create an administrator account for a partner”.
- See “To edit a partner's administrator account”.

To create an administrator account for a partner

1. In the left navigation pane, select **Partner Management**>**Partners**.

The summary of the available child partners is displayed.

- To navigate through the list, use the navigation tools at the bottom of the list.
- To view a specific number of child partners per page, select any option from the **Items per page** drop-down list.
- To search for a partner in the list, type a word or phrase in the Search field above the partner list, and press **Enter**or click the**Search** icon.
- To clear the search results, remove the text from the Search box and press Enter.

1. Select the partner for which you want to create or edit administrator accounts.

The Partner Details tab is displayed by default.

1. Select the **Admin Accounts** tab.
2. Click **Add New** , and specify the following details.

FIRST NAME	ENTER THE FIRST NAME OF THE USER.
Last name	Enter the last name of the user.
Primary email address	Enter the email address of the user. If the partner has more than one domain configured, select the required domain from the drop-down list.

FIRST NAME	ENTER THE FIRST NAME OF THE USER.
User name	This box displays the user name, which corresponds to the primary email address you specified.
Auto Generate Password	By default Enterprise Vault.cloud generates a new password automatically and sends it to the account's primary email address.
	Clear the check box to specify a password of your choice.

3. Click **Save** to create the new partner administrator account.

Partner Management adds the new partner administrator to the table of administrator accounts.

1. Search for and select the new account in the table of administrator accounts. Then, in the table row for the new administrator account, select or clear the check boxes to determine the areas of the Administration Console that this administrator has access to:
   - **Customer Manager** : Can access Customer Service, with the Customer Manager administration role.
   - **Partner Manager** : Can access Partner Management, with the Partner Manager administration role.
   - **Archive Admin** : Can access Archive Administration, with the System Administrator administration role.

   > “ ”

   Note: You must select Partner Manager if you want the administrator account to be able to create and manage child partners.

   > “ ”

2. Click **Save**.

To edit a partner's administrator account

1. In the left navigation pane, select **Partner Management**>**Partners**.

The summary of the available child partners is displayed.

- To navigate through the list, use the navigation tools at the bottom of the list.
- To view a specific number of child partners per page, select any option from the **Items per page** drop-down list.
- To search for a partner in the list, type a word or phrase in the Search field above the partner list, and press **Enter**or click the**Search** icon.
- To clear the search results, remove the text from the Search box and press Enter.

1. Search for and select the newly provisioned partner company from the partners list.
2. Select the **Admin Accounts** tab.
3. Select the account in the table of administrator accounts. Then, in the table row for the new administrator account, select or clear the check boxes to determine the areas of the Administration Console that this administrator has access to:

- **Customer Manager** : Can access Customer Service, with the Customer Manager administration role assigned.
- **Partner Manager** : Can access Partner Management, with the Partner Manager administration role assigned.
- **Archive Admin** : Can access Archive Administration, with the System Administrator administration role assigned.

> “ ”

Note: You must selectPartner Managerif you want the administrator account to be able to create and manage child partners.

> “ ”

1. Click **Save**.

Managing Administration Roles

This section includes the following topics:

About administration roles

You can assign Partner Management administration roles to your company's administrator accounts. The Partner Management administration roles allow access only to those areas of the Partner Management tool that are required to perform a particular set of administration functions. An account can be assigned more than one Partner Management administration role, if required.

Two types of administration role are available:

- Built-in roles. These roles are supplied default administration roles for immediate use. Each built-in role is supplied with a set of default permissions that are appropriate for performing that role. The built-in roles for Partner Management are as follows:

PARTNER MANAGER	ALLOWS ACCESS TO ALL AREAS OF THE PARTNER MANAGEMENT TOOL.
Partner Report Manager	Allows the generation and management of Partner Management reports.
Partner Role Manager	Allows the configuration of Partner Management roles and permissions.

- Custom roles. You create these roles as you want, to provide tailored access to specific areas of the Partner Management tool. You can create as many custom roles as you want.

The Overview page of the Partner Management Roles node displays a list of all the Partner Management roles currently in use. The list also shows the number of accounts that are assigned to each role.

Changing the permissions for a built-in Partner Management administration role

You can modify some of the permissions of the built-in administration roles, except for the Partner Manager role.

Note: Any changes that you make to a role affect all of the accounts to which the role is assigned.

To change the permissions for a built-in Partner Management administration role

1. In the left navigation pane, click **Partner Management**>**Administration Roles**.
2. In the Built-in Roles section, click the role you want to edit.

The Administration Roles page displays the currently selected permissions that are granted to the role.

1. Select or clear the check boxes next to the permissions you want to grant or remove for the selected role.

   Note: Some permissions cannot be deselected for a built-in administration role.

2. Click **Save**.

Creating custom Partner Management administration roles

You can create custom Partner Management administration roles. Each custom administration role can have the complement of permissions that you require.

To create custom Partner Management administration roles

1. In the left navigation pane, click **Partner Management**>**Administration Roles**.

2. Right-click **Custom Roles**and on the shortcut menu click**Add**.
3. In the text box at the bottom of the list of custom roles, enter a name for the new custom role.
4. Select the check box for each permission that you want to grant to the custom role.
5. Click **Save**.

Editing, renaming, or deleting custom Partner Management administration roles

You can change the permissions that are granted to a custom Partner Management administration role.

Note: Any changes that you make to a role are applied to all of the accounts that are assigned the role.

You can also delete or rename custom Partner Management administration roles.

Note: You cannot delete or rename the built-in roles.

To edit a custom Partner Management administration role

1. In the left navigation pane, click **Partner Management**>**Administration Roles**.
2. Right-click **Custom Roles**and on the shortcut menu click**Edit**.
3. Select or clear the permissions check boxes to grant or remove permissions as required.
4. Click **Save**.

To rename a custom Partner Management administration role

1. In the left navigation pane, click **Partner Management**>**Administration Roles**.

2. Right-click **Custom Roles**and on the shortcut menu click**Edit**.
3. In the text box, enter the new name for the custom role.
4. Click **Save**.

To delete a custom Partner Management administration role

1. In the left navigation pane, click **Partner Management**>**Administration Roles**.
2. Right-click **Custom Roles**and on the shortcut menu click**Delete**.

Customer Service asks you to confirm that you want to delete the role.

Assigning Partner Management administration roles

You can assign the Partner Management built-in administration roles or custom administration roles to your company's archive accounts, as required.

To assign Partner Management administration roles

1. In the left navigation pane, click **Partner Management**>**Administration Roles**.
2. From the list of archive accounts, select the account to which you want to assign a role.
3. On the Role Change page, select the check box for each built-in role or custom role that you want to assign to the account.

   > “ ”

   Note: Click the name of a role to see a list of the permissions that are currently granted to that role.

   > “ ”

4. Click **Save**.

Managing Reports

This section includes the following topics:

- About reporting in Partner Management
- Viewing the Partner Management reports
- Viewing archiving statistics of partners on dashboard
- Creating subscriptions to the Partner Management reports

About reporting in Partner Management

You can view the statistical reports on archive usage for your company and your partner's customers, and statistics for individual archive accounts. You can save these reports for future reference. You can export these reports as EXCEL, PDF, CSV, and WORD formats. You can also set up subscriptions to a weekly email that contains a selected report. A monthly report newsletter is also available.

The following reports are available for viewing or email subscription:

- Monthly Storage Summary
- Active Customers Monthly Summary
- Weekly User Activity Summary
- Partner Weekly Summary
- Trial Registration Summary

The following additional report is available for subscription only:

- Journal Warning

Viewing the Partner Management reports

You can view the Partner Management reports for any customer you select.

To view a Partner Managementreport

1. Log on to the Archive Administration console.
2. In the left navigation pane, select Reports and Notifications > Partner Reports.

The **Partner Management Reports** page appears.

1. In the Select Partner drop-down list, select the partner who is to be the subject of the report.
2. In the **Select Report** drop-down menu, select the required report.
3. Click **Apply**.
4. If required, click **Export** icon to export the report in EXCEL, PDF, CSV, or WORD format.

Viewing archiving statistics of partners on dashboard

You must have the Partner Manager role and permissions to view this dashboard statistics. You can view and export general information and usage statistics of mails in the archives of partners. The information available from the dashboard view includes the following in a tabbed layout:

TOTAL PARTNERS	DISPLAYS TOTAL PARTNER COUNT.
Total Customers	Displays total customer count.
Partner Customers	Displays count of partner customers.
Customer Count	Displays total number of customers with all partners.
Latest Partners	Lists the recently joined partners.
Top Partners	Lists details of top partner.
Latest Customers	Lists the recently joined customers.
Product Based Distribution	Displays product-specific usage by customers.
Trending Products	Displays the products that are trending for partners.

To view archiving statistics of partners

1. Log on to the Archive Administration console.
2. In the left navigation pane, select Reports and Notifications > Partner Dashboard.

On the Partner Weekly Report page, the partner-specific statistics appears.

1. If required, click **Export** icon to export the report in EXCEL, PDF, CSV, or WORD format.

Creating subscriptions to the Partner Management reports

Partner Management reports can be delivered in a weekly email to the customer accounts that have the Archive Administration roles you select. You can also set up a subscription for a specified email address to a monthly email report.

To create subscriptions to Partner Management reports

1. Log on to the Archive Administration console.
2. In the left navigation pane, select **Reports and Notifications**>**Report Subscriptions**.
3. In the **Select Partner** drop-down menu, select the partner who is to be the subject of the report.
4. In the **Select Report** drop-down menu, select the report you want to send.
5. Select the **Send reports update** check box.
6. Under Administration Roles to Subscribe, choose which Archive Administration roles are to receive the subscription. For example, if you select **Policy Manager**all of the selected partner's accounts that hold the**Policy Manager** role are sent the report.

   Note: To see which of the selected partner's accounts currently belong to a particular role, click the role name in the role list.

7. To subscribe a monthly report newsletter to someone who does not use the archive, enter the person's email address in the **Email**box, and click**Submit**.

   Note: A known issue exists for this option.

8. Click **Save**.