Adding a New User

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To access **Users**, you must have administrative rights. If you do not see a feature mentioned below, your **User** information will have to be modified before you can add a new user.

Access the Users Feature

- 1. Click on System Setup and select Users.
- 2. To create a new user, click Add User.
- 3. When the Add New User window is presented, type in the following under User Information:
 - Display Name should be the formal name of the user: Jane Mathews
 - User's Initials will be first and last initial: JM
- 4. Under Login Information supply the following:
 - Create a unique Login Name.
 - Create a password of your choice and repeat it to confirm.

ALERT: Passwords are CASE sensitive.

5. Check **Notify Me on Data Delivery** if the user will need to get data updates.

| System Setup | 🔁 Users |
|--|---|
| wo Media Sales | Add User |
| 🖃 🚞 System Setup | |
| Primary Station(s) | General |
| Ctation Mappings | |
| 🛅 Users | Logon Name |
| Coser Roles | |
| Contraction Contractic Contra | Abbreviation |
| Agencies | WO Media Sales |
| Advertisers | |
| Time Blocks | Add New User |
| Cable Zones | Enter the information and settings for this user. |
| Spot Lengths | |
| Notification Setup | |
| Traffic Interface | |
| 🗄 🧰 Inventory Setup | Login Information User Information |
| CRM Accounts Setup | 10 |
| | Display Name Journal User's Initials JM |
| Sales/CRM | |
| | Commission 0.00 |
| Sesearch | |
| | |
| Sales Reports | Login Information |
| A System Setup | |
| . d. System Secup | Logon Name JM |
| | Password password Confirm Password |
| | |
| | Distriction of Destroyation |
| | L noury me on Data Delivery |
| | |

6. At the bottom of the window, a box by **Active** is tagged by default. You can inactivate the user without removing them by untagging this field.

7. Once the values for required fields have been supplied the **Add** button becomes enabled. Click it to add the new user.

| Active | | |
|--------|-----|--------|
| | Add | Cancel |

8. After adding the user, additional tabs display along the left side of the window. Click the **User Access** tab. This is where you assign permissions within *WO Media Sales*. You can choose an option at the top of the screen, giving the user access that has already been pre-selected, or you can assign this user a **User Role** by selecting one in the **User Role** drop-down menu.



9. For users on *WO Media Sales* 2019 and beyond, access to **SOX** reporting is no longer applied by default. To allow a new user access to this feature, select **Custom** from the **User Role** drop-down menu and then tag **Can View Traffic Skims** under **Management Reporting**.

| Enter the information and setting | gs for this user. | |
|-----------------------------------|-------------------|---|
| Login Information | 🤅 🔗 Give Us | er Full Access 🔑 Give User Default Access 🔏 Give U: |
| User Access | User Role | Custom> |
| Market/Station Access | | Can View Traffic Skims with Drilldown Management Reporting |
| Traffic Links | | Can View SOX Reports |
| Mailing Addresses | | Can Add Account Can Add Account without Approval Can Add Account without Approval |
| Phones | | Can Edit Account |

10. Two levels of Skims access are available for users on WO Media Sales 2019 and beyond. Apply Custom for the User Role and tag one or both of the accesses for this user only. Can View Traffic Skims allows the user to see Sellout Levels by week. **Can View Traffic Skims with Drilldown allows** the user to see a more in-depth view of traffic sellout details, including Order Number, Time and Placement, and **Rates**.

To learn more about user access for **Skims**, see the video tutorial, "Tracking Sellout Levels with the Skims Feature -User Setup." You may also want to view the system **Help** topic "The Skims Feature" found under the "Lower Tabbed Panel" sub-topic of "Open Campaign Window".



WO MEDIA SALES

Tip: If you wish to give **Skims** rights to a large group, for instance, if you want to apply **Skims** rights to all users who have previously been assigned the **User Role** of **Account Executive**, go to **User Roles** under the **System Setup** folder, double-click on the role, and tag one or both of the **Skims** accesses in the resulting **User Role Properties** window under **Campaigns**. Click **OK** and all users with this **User Role** assigned will now have access to **Skims**.



Please note: If you do not see a **Skims** tab in the lower tabbed panel of an open campaign, contact your **Account Manager** or call support to have this feature turned on for your station by a *WO Media Sales* associate.

11. Click the **Market/Station Access** option. This is where the user is assigned access to the **Market(s)** and the **Station(s)**. In some cases, multiple markets and stations are available. All **Markets** and **Stations** display, but only the **Stations** associated with the **Market(s)** selected will be accessible. Tag all **Markets** needed and then tag the necessary stations.

| Login Information | Markets | Stations |
|--------------------|---|------------|
| User Access | Image: Constraint of the second se | Select All |
| Digital Properties | BURLINGTON-PLATTSBURGH CASPER-RIVERTON CEDAR RAPIDS-WTRLO-IWC&DUB CHARLESTON-HUNTINGTON CHARLESTON-HUNTINGTON CHARLOTTESVILLE QEYENNE-SCOTTSBLUFF | |

12. Select the Traffic Links tab and then click Manage Traffic Links.



Tip: If this User is a manager or a sales assistant who will be handling posts for many AEs, you can tag Can View All Posts in the User Access tab under Campaigns instead of setting up Traffic Links.

This is a list of users *WO Media Sales* reads from your traffic system. Choose the user from the list on the right and click the **Move Left** icon to move them to the **Linked Accounts** list on left. Sometimes users will have multiple numbers or will be listed more than once. All iterations of that user can be added to **Linked Accounts**. Click **OK** when finished.

| Login Information | Station Traffic ID | Name in Traffic System | | | ~ |
|--------------------|--------------------|------------------------|-------------------|----------------------------------|---|
| User Access | Traffic Lin | ks for | | | |
| Digital Properties | Linked Accounts | | Traffic Users | | |
| | WideOrbit User | Traffic User | Drag a column hea | der here to group by that column | |
| Traffic Links | | | Traffic User | A Sis # Antiquated | |
| | | | Azerrd | {778D66D | |
| | | _ | Ab | {E63E079 | |
| | | F | Ab | {E63E079 | |
| Mailing Addresses | | | At-malac | {14395AD | |
| 1 | | | At-malac | {14395AD | |
| | | | Abaranalac | {14395AD | |
| | | | Acamana | {8A10061 | |
| | | | Acam | {A09E745 | |
| | | | Ac | {A09E745 | |
| | | | Acaman | {A09E745 | |
| | | | Ac | {7D0EF89 | |
| | | | Ac | {F5F59EF | |
| | | | Ac | {F5F59EF | |
| | | | Ac | {F5F59EF | |
| | | _ | Acumentation | {745DA57 | |
| | < | > | < | > | |
| | | | ✓ Hide Duplicat | es | |
| | | | | OK Cancel |] |

13. Click **Add** in the **Mailing Addresses**, **Phones**, and **Emails** tabs to enter in the user's contact Information. Click **OK** when each dialog is complete and **OK** again in the tab window.

| Login Information | 🚯 Adı | d 没 Edi | t 🔞 Del | lete | | | | | |
|-----------------------|--------|----------------|-------------------------------------|----------------------------------|------------------|----------------|-------|-----|------|
| -1/ | Primar | y? Type | Ad | ldress | | Address 2 | = | | |
| User Access | ۱ | WO Media | Sales | | | | | | _ |
| Market/Station Access | | Add/E Enter | dit Ema the informat | ail Accour tion for this emai | nt I account. | | | Č | F |
| Digital Properties | | | User Infor | rmation | | | | | |
| Traffic Links | | | <u>E</u> mail Ac Your <u>N</u> a | ddress: me: | | | | | |
| Mailing Addresses | | | Server Inf | formation | | 1 (1000) | | | |
| | | | Email pr | ovider: ig mail server: | Standard P | rovider (POP3) | Port: | 143 | |
| 2 Phones | | | Outgoin | ıg mail server: | | | Port: | 25 | |
| Emails | | | Logon Info | ormation | | | | | |
| Websites | | | User Na Passwo | me: rd: | | | | | |
| | | | Primary | email account | | | | | |
| | | Test Co | nnection | | | ок | | Can | ncel |



Alert: Enter in the Server Information only if the user will be synching their email information into their CRM system. Click Use Owner Server Addresses or manually type in the IP addresses for each of the server fields. Login Information should be similar to the login name used to sign in to the computer. Click Test Connection to confirm connectivity success.

14. Select the Websites tab and click Add to enter in the station's URL.

| Login Information | Add 🗞 Edit 🚯 Delete |
|-----------------------|--|
| Prin | ary? Website URL Description |
| User Access | |
| Market/Station Access | WO Media Sales X |
| Digital Properties | Enter the information for the website. |
| Traffic Links | Website Information |
| Mailing Addresses | Web Site ···· |
| 2 Phones | Primary |
| Emails | |
| Websites | OK Cancel |



Tip: Once the user is set up, click **Send Install Email** in the lower-left hand corner of the screen if the system has not yet been installed on the new user's machine.



15. Click **OK** and the new **User** is added to the system.

If you have any questions or concerns, please call or email support. We are happy to help. *WO Media Sales* Support: 415.675.6775 Option 2, 1 sales-support@wideorbit.com

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