

# 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.

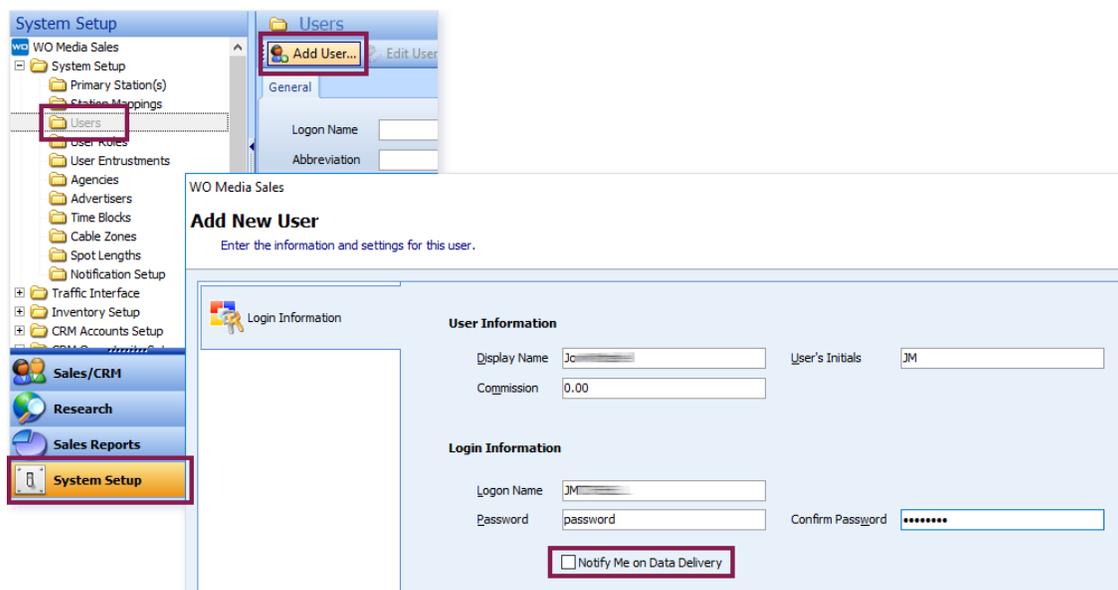
## Access the Users Feature

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.



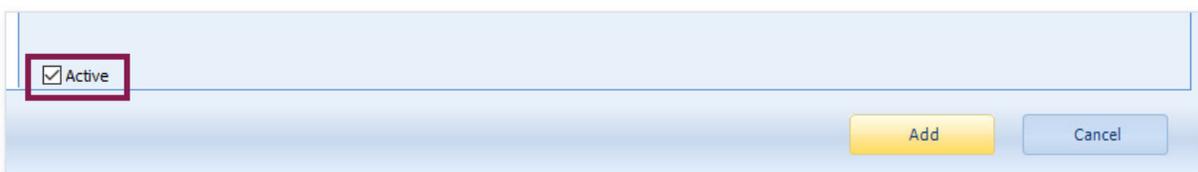
**ALERT:** Passwords are CASE sensitive.

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

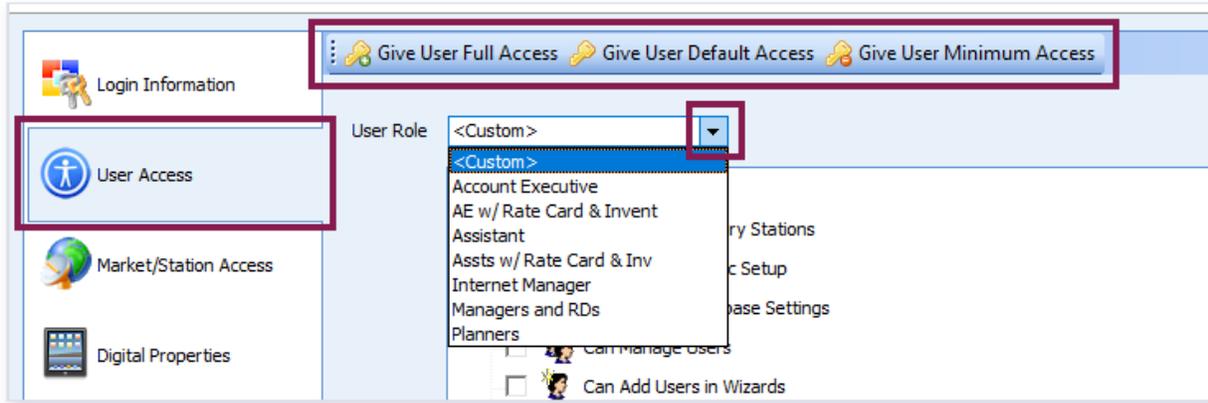


6. At the bottom of the window, a box by **Active** is tagged by default. You can inactivate the user without removing them by untagging this field.

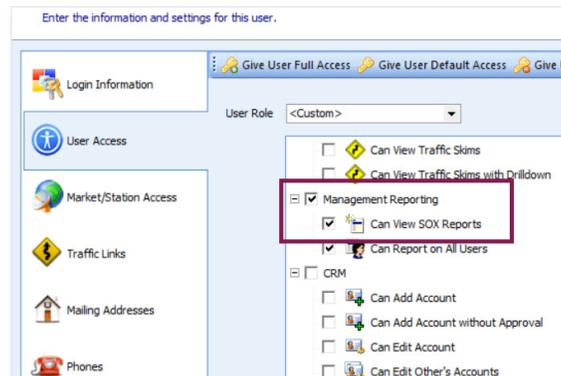
7. Once the values for required fields have been supplied the **Add** button becomes enabled. Click it to add the new user.



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.

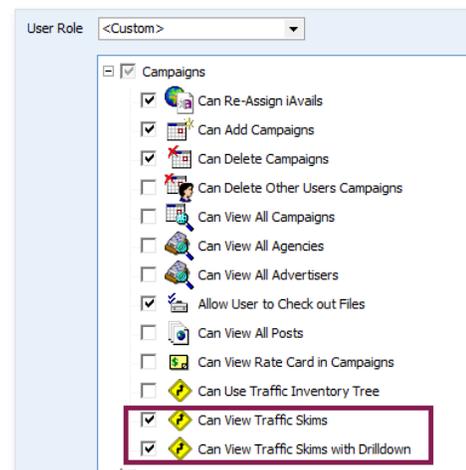


9. For users on *WO Media Sales* 2019 and beyond, access to **SOX** reporting is no longer applied by default. To allow a new user access to this feature, select **Custom** from the **User Role** drop-down menu and then tag **Can View Traffic Skims** under **Management Reporting**.



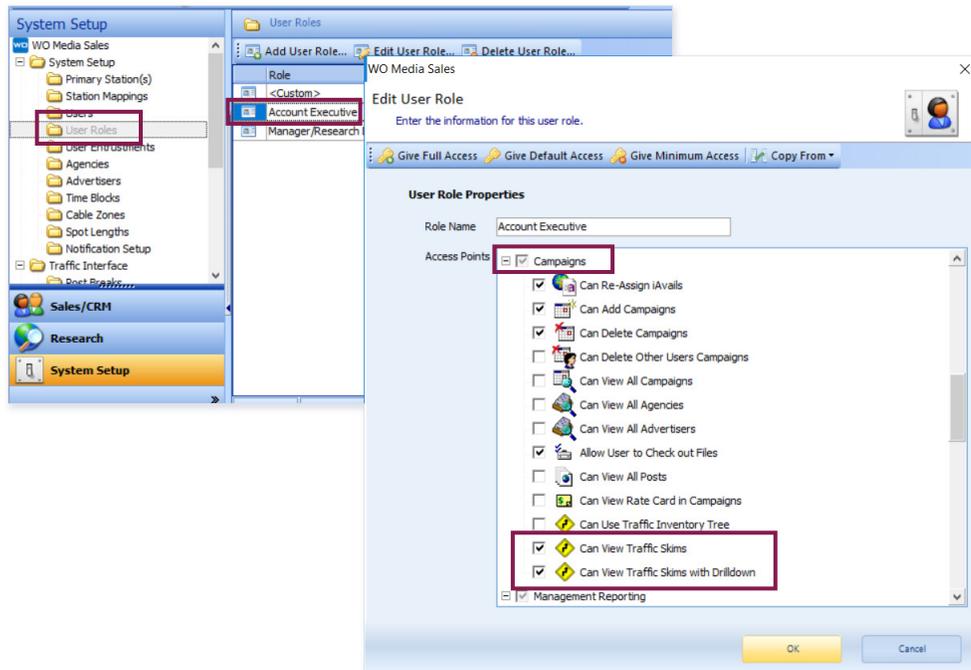
10. Two levels of Skims access are available for users on *WO Media Sales* 2019 and beyond. Apply Custom for the User Role and tag one or both of the accesses for this user only. **Can View Traffic Skims** allows the user to see Sellout Levels by week. **Can View Traffic Skims with Drilldown** allows 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".



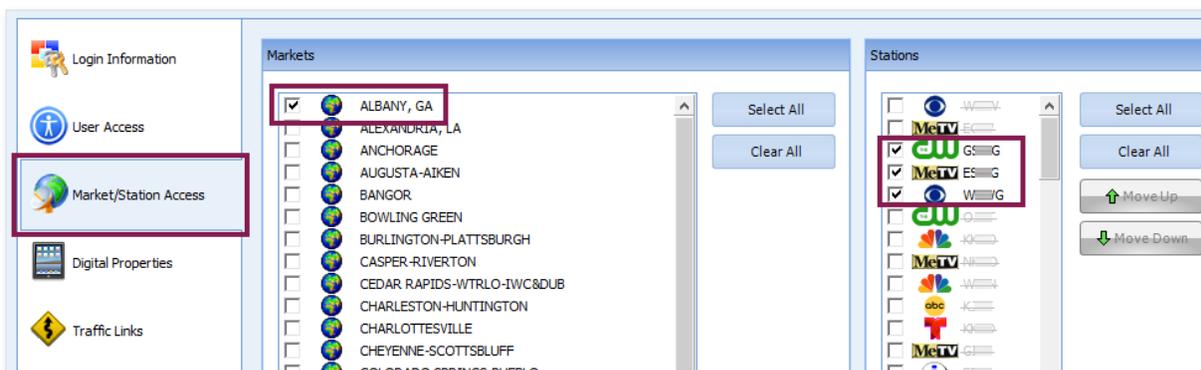


**Tip:** If you wish to give **Skims** rights to a large group, for instance, if you want to apply **Skims** rights to all users who have previously been assigned the **User Role** of **Account Executive**, go to **User Roles** under the **System Setup** folder, double-click on the role, and tag one 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.

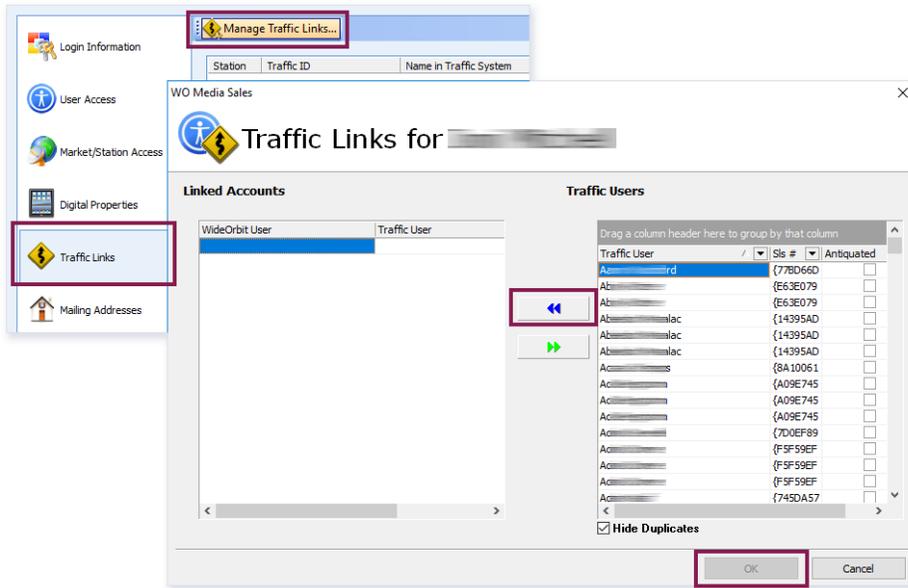


12. Select the **Traffic Links** tab and then click **Manage Traffic Links**.

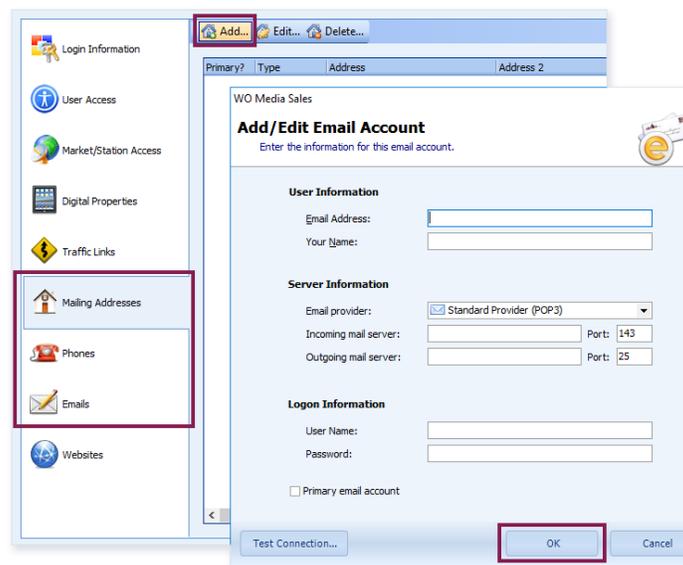


**Tip:** If this **User** is a manager or a sales assistant who will be handling posts for many AEs, you can tag **Can View All Posts** in the **User Access** tab under **Campaigns** instead of setting up **Traffic Links**.

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.

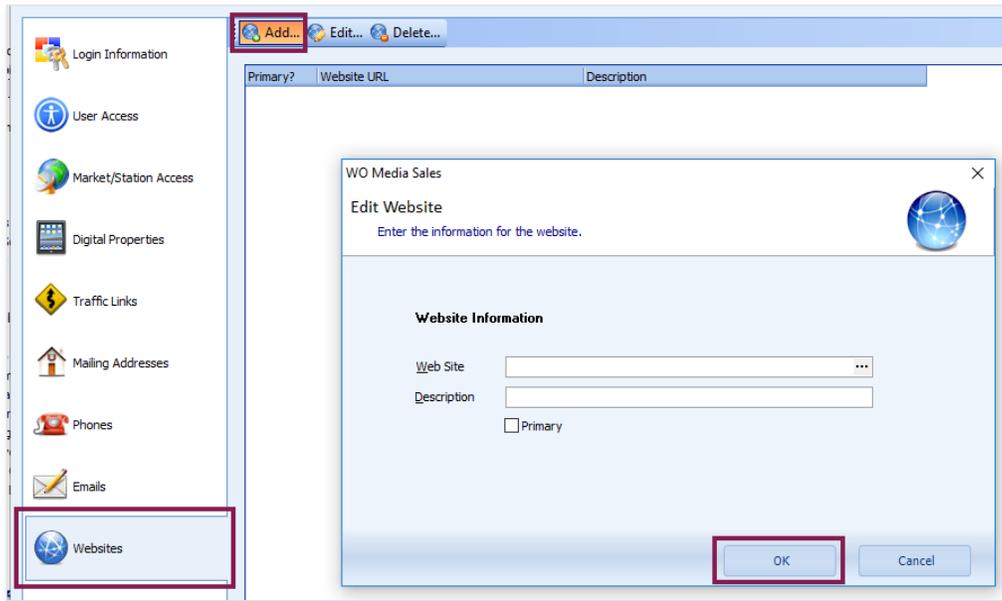


13. Click **Add** in the **Mailing Addresses**, **Phones**, and **Emails** tabs to enter in the user's contact Information. Click **OK** when each dialog is complete and **OK** again in the tab window.

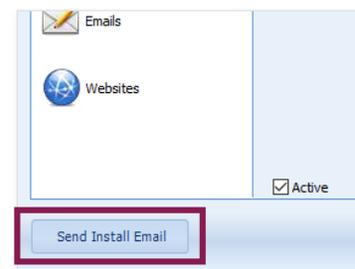


**Alert:** Enter in the **Server Information** only if the user will be syncing their email information into their **CRM** system. Click **Use Owner Server Addresses** or manually type in the **IP** addresses for each of the server fields. Login Information should be similar to the login name used to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



**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.

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