Client Portal

User Guide

Changepoint PSA 2017

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1. Changepoint Client Portal Introduction

About Changepoint Client Portal

Client Portal is an application that external users can use to access a subset of Changepoint functionality. In order to become a Client Portal user, you must be sponsored by a Changepoint resource. Your sponsor sets up your Client Portal access and determines the sections of Changepoint that you can access.

Depending on your access rights, you can do the following through Client Portal:

- view the profiles of Changepoint resources
- view invoices
- check project and task status
- create, track, and close requests
- search the support knowledge base
- process workflow steps
- use team folders

Signing in to Client Portal

When your Changepoint sponsor has set up your Client Portal access, an email message that includes your user ID, password, and the URL is sent to you. Your access has an expiry date. If you want to extend your access, you must contact your sponsor to set a new expiry date.

If you forget the password for your Client Portal access, contact your Changepoint sponsor to reset your password. You will be sent an email with the new password.

1. Start your web browser application.
2. In the address bar, enter the URL for Client Portal.
3. Enter your user ID and password.
4. Click **Sign in**.

   Client Portal is displayed.

Client Portal toolbar icons

The toolbar icons are described in the following table.

	Description
	Moves a page backwards
	Moves a page forward
	Reloads the document to display any changes made
	Allows you to change your Client Portal password
	Opens Client Portal help
	Signs you out and closes your Client Portal session

Client Portal Applications bar options

The Applications bar provides the main navigation for Client Portal. It also displays the current date and the name of the organization that hosts your access to Changepoint through Client Portal.

The options available to you in the Applications bar depend on your access rights, which are determined by your Changepoint sponsor. The items in the Applications bar are described in the following table.

Item	Description
Home Page	Displays the Client Portal home page. The home page provides a brief description of the Applications bar items.
Workflow Reminders	Displays the **Workflow Reminders** view that lists all the workflow items that require your response.
Directory	Lists the Changepoint resources that you are permitted to view. Click a name to view the resource's profile.

Item	Description
Projects	Lists the projects that have been created for your organization and enabled for viewing in Client Portal.
Invoices	Lists invoices that have been created for your organization. Invoices with **Draft**, **Discarded**, **Archived**, and **Credited** status are not displayed. Click an invoice ID to display the details for the invoice.
Teams	Communicating and collaborating with your team members.
Requests	Creating requests, viewing your organization's requests, copying requests, closing requests, and viewing documents in the knowledge base.

Signing out of Client Portal

You can only have one active Client Portal session at a time.

To sign out and end your Client Portal session properly, click in the toolbar. If you close the browser window without signing out, your Client Portal session stays open. The next time you sign in, you must close either the current or previous session.

Changing your Client Portal password

For security reasons, you should change your password when you sign in to Client Portal for the first time. Do not share your password with anyone.

1. In the Client Portal toolbar, click .

   The **Change Password** dialog box appears.

2. In the **Enter current password** field, enter your current password.
3. In the **Enter new password** field, enter your new password.
4. In the **Re-enter new password** field, enter your new password again.
5. Click .

2. Resources, Invoices and Projects

Viewing the profile of a Changepoint resource

You can view profiles of internal Changepoint resources. Each page contains contact, address, and personal information of the selected resource.

1. In the Applications bar, click **Directory**.

   A list of Changepoint resources that you have access to view displays, sorted alphabetically by first name.

2. To view a resource's profile, click the resource name.

About invoices

In Client Portal, invoice formats appear as HTML snapshots if snapshots exist. If snapshots do not exist, invoices use the Changepoint **General Invoice** format. If your organization uses custom invoice formats that do not save the HTML snapshot, invoices appear in the **General Invoice** format only.

Viewing an invoice

If you have invoice access rights, you can view the Changepoint invoices for your organization. Invoice IDs that begin with numbers are listed first, followed by invoices that begin with letters, which are listed in alphabetical order. Invoices with **Draft**, **Discarded**, **Archived**, and **Credited** status do not display.

1. In the Applications bar, click **Invoices**.

   A list of invoices that have been created for your organization appears.

2. To view the invoice details, click the invoice ID.

Viewing a project

If you have been granted project access rights, you can view details and status information for projects and tasks related to your engagements. Only projects that have been created for your organization, and have been specified as available for viewing in Client Portal, are displayed.

1. In the Applications bar, click **Projects**.

   A list of projects that have been created for your organization appears.

2. To view the project details, click the project name.

   Note: The project manager information is displayed only if you have been granted access to the project manager's resource profile.

3. To view task information, click the task name.

4. To view information about a resource assigned to a task, click the resource's name.

   Note: The resource profile is displayed only if you have access to it through Client Portal.

3. Request and Support Data

About requests in Changepoint Client Portal

You can use the requests functionality in Client Portal to do the following:

- view your organization's requests
- create, copy, and close requests
- view support items and other documents in the support knowledge base

Request icons in the Client Portal request menu bar

The following table describes the icons on the request menu bar.

Icon	Description
	Attaches a file to the request.
	Creates a new request by copying the existing request.
	Enters comments about the request.
	Displays request history details.
	Closes the request. Depending on the state of the request workflow process and your access rights, the close option might not be available.

Request status in Client Portal

This topic lists the standard request statuses and descriptions of how the statuses can be used within the request workflow

Status	Description
Pending Authorization	If approvals are required, the status of a new request is **Pending Authorization** as soon as it is entered in the system. This means that it is waiting to be either approved or rejected. If approvals are not required, the status of a new request is automatically **New**.
Rejected	The request has been rejected by the approver, and will not be worked on.
New	If approvals are not required, the status of a new request is **New** and it automatically becomes a new item for a resource to work on. If approvals are required and he request must be approved, it is assigned the status **New**.
In queue	The request has been placed in a queue, which determines where the request moves in the workflow. Queues are optional; requests can be distributed either through queues or by direct assignment.
Assigned	The request has been assigned to a resource for action. The resource assigned to the request receives a notification in Changepoint.
Reassigned	An assigned request was reassigned to a different resource.
In Service	An assigned request is being resolved or worked on.
Clarification Required	Additional information is required as part of the resolution process.
Clarified	Additional information was provided as part of the resolution process.
Pending Verification	The request is resolved. However, more information is needed before it can be closed.
Closed-Pending Verification	The request is resolved and will be closed after more input has been provided, usually by the initiator, who will verify that the resolution is acceptable.
Opportunity Created	The request has been accepted or selected for further consideration.

Status	Description
Canceled	The request has been canceled.
Closed	The request has been resolved.
Reopened	A request that was closed has been re-opened. You cannot reopen a request from the **Canceled** state.

Accessing a request in Client Portal

You can view all requests for your organization.

1. In the Applications bar, click **Requests**.
2. Do one of the following:
   - To access an open request, click **View open requests**
   - To access a closed request, click **View closed requests**

   The requests that have been opened in the last six months (180 days) are displayed.
3. You can search for a request based on a different date range, request number, or request type. For more information, see the "Searching for requests in Client Portal" section on page 17.
4. To sort the request list, click a column heading.
5. Click the request number.

   The request profile appears.

Creating a request in Client Portal

1. In the Applications bar, click **Requests**.
2. Click **Create request**.
3. If the **Select Request Template** dialog box appears, do one of the following:
   - To use a template, select the request template from the list, and then click **OK**.
   - To proceed without using a template, select **No template**, and then click **OK**.

   The **Create Request** view appears.

4. Complete the fields as required. For information more information, see the "Create Request view options" section on page 14.
5. To attach a file:
   a. Click **Attachment**.
   b. Click **OK** to continue.
   c. The **Upload Attachment** dialog box appears.
   d. Complete the fields as required. For more information, see the "Upload Attachment dialog box options" section on page 16.
   e. Click **Upload**.
6. Click .

Create Request view options

Option	Description
Initiator field	Your name.
Company field	Name of your organization.
Reference number field	Your reference number.
Engagement list	Engagement associated with the request. Engagements with valid SLAs display in the top half of the list and engagements without SLAs display in the lower half of the list.
Project list	Project associated with the request.
Type list	Type of request.
Product list	Product that the request is associated to.
Request priority list	Priority of the request.

Option	Description
Quantity field	If the billing type is **Effort and product**, you must enter a value for the quantity. The product's unit cost is multiplied by the quantity to calculate the billed amount. This field displays for work requests when there is a product that will be billed to you when the work request is closed.
Category field	Request category.
Subcategory field	Request subcategory.
Short description field	Brief description of the request
Comments field	Information to be added to the history of the request
Configurable fields section	Additional section containing fields configured by your sponsor's organization. Complete these configurable fields as required.

Attaching a file to a request in Client Portal

1. Access the request.
2. On the request profile, click .

   The **Upload Attachment** dialog box appears.
3. Complete the fields as required. For more information, see the "Upload Attachment dialog box options" section on page 16.
4. Click **Upload**.

Upload Attachment dialog box options

Option	Description
File path field	Directory path of the file.
Browse button	Opens the **Choose File to Upload** dialog box.
File name field	Name of the file.
Description field	Description of the file.
Private check box	When selected, only the user who attached the file can view the file.

Adding a comment to the request history

You can add comments to the request history.

1. Access the open request.
2. On the request menu bar, click .

   The **Update Request History** dialog box appears.
3. Enter the comments in the **Update** field.
4. Click **OK**.

Viewing the history of a request

The **Request History** view includes the following information:

- date and time the request was created, creator of the request, as well as the initial type, status, priority, and assignment
- date and time the request is updated, resolved or assigned
- name of the resource who updated the request

You cannot view the history of closed requests.

1. Access the request.
2. On the request profile, click .

   The **Request History** view appears.

3. To return to the request profile, click .

Copying a request in Client Portal

1. Access the request that you want to copy.
2. On the request menu bar, click .

   The **Create Request** view displays with the fields completed with the values from the source request.

3. Make the necessary changes.
4. Click to save.

Closing a request in Client Portal

The close option may not be available, depending on the current status of the request and the access rights assigned to you.

1. Access the request.
2. On the request profile, click .
3. Click **OK** to confirm.

   The **Update Request History** dialog box appears.

4. Enter the comments in the **Update** field.
5. Click **OK**.

Searching for requests in Client Portal

You can search for open or closed requests based on the date that the request was opened, request type, and request number.

1. In the Applications bar, click **Requests**.
2. Do one of the following:
   - To search for an open request, click **View open requests**.
   - To search for a closed request, click **View closed requests**.
3. By default, the date range is for six months (180 days) prior to the current date. To specify a different date range:

a. In the **Start** date field, enter the start date.

b. In the **End** date field, enter the end date.

4. In the **Request type** section, select the check boxes for one or more request types.
5. In the **Request number** field, enter a partial or full request number.
6. Click **Search**.

   The requests that match the search criteria are displayed.

7. To view the request details, click the request number.

Searching for support items in Client Portal

You can search for support items (FAQs, technical notes, documentation, and tools), and requests based on a partial word or one or more words. You can perform a more detailed search for requests in the request views. For more information, see "Searching for requests in Client Portal" on page 17.

1. In the Applications bar, click **Requests**.
2. Click **Support Search**.

   The **Support Search** view appears.

3. In the **Search word(s) or phrase** field, enter the search text.
4. From the **Results per page** list, select the number of search results that you want to display per page.
5. In the **Search Scope** section, do one or more of the following:
   - To search all requests and support items, select the **Select all** check box
   - To search for requests, select the **Requests** check box.
   - To search for support items, select the check box of each support item type that you want to include in the search.
6. Click **Search**.

   The **Support Search Results** view displays the requests and/or support items that match the search criteria.

7. To view a request or support item, click the link in the **Type** column.

Support item search guidelines

Search Goal	Enter	Example of a Result
Search for a single word, for example, SQL	SQL	• SQL Server • SQL Troubleshooting document
Search for an exact multiple word phrase, for example, SQL Server	"SQL Server"	• SQL Server • The most robust is SQL Server
Search for part of a word using a wildcard, for example, Change*	"Change*"	• Changepoint • Change my password • Change Management
Find two words that are in a sentence but not necessarily an expression, for example, to find cookies and browser in the same sentence	Cookies near browser	From the website there are a number of cookies that will be downloaded to your browser
To find a combination of two words in a search, for example, Changepoint, Microsoft	Changepoint and Microsoft	Changepoint and Microsoft are well matched
To find a word but exclude the results that include another word	server and not sql	
To find one word or another in a search, for example, to find ASP or portal	ASP or Portal	• Client Portal • The ASP version of the portal

4. Team Folders

About team folders in Client Portal

Team folders are folders that you can use to post and share information. A team folder can also be used as a portal to a website, or collaborative tools such as a wiki.

If you have been made a team member of a team folder by your Changepoint sponsor, you can create *team items*, which include: discussions, Internet links, polls, events, bulletins, and attachments. You can view the team items created by other users in the team folder and respond to team items by creating sub-items.

Accessing a team folder in Client Portal

1. In the Applications bar, click **Team folders**.

   The team folders that you can access are displayed.

2. Click a team folder.

   The team items are displayed.

Sorting team items in the team folder

By default, the team items in the team folder are listed in the order that they were created, with the newest team item at the top. You can change the sort order for the team items.

1. Access the team folder.
2. To sort the team items in descending order by the date they were created, click **By date**.
3. To sort the team items in alphabetical order by the name of the user who created them, click **By author**.
4. To sort the team items in alphabetical order by title, click **By title**.

About team items in Client Portal

The following table describes the types of team items that can be created within a team folder.

	Function	Description
	Link	Link to a website, application or files that are available through a URL.
	Discussion	Topic to be discussed or debated
	Bulletin	Announcement that can be posted and responded to by other team members
	Attachment	File for sharing with team members
	Event	Information about a public or private event
	Poll	Method for posing questions to team members and view both the results and participation information

Creating a link team item in Client Portal

You can inform your team members of relevant Internet links by adding a new link to the team.

1. Access the team folder.
2. Click **Create team item**.

   The **Team Item** dialog box appears.
3. Click **Link**.

   The **Create Link** dialog box appears.
4. In the **Link name** field, enter the name of the link.
5. In the **URL** field, enter the web address for the link.
6. In the **Description** field, enter a description of the link.
7. To allow other team members to view and select the link, select the **Can be viewed by all team members** check box.
8. Click to save.

Creating a discussion team item in Client Portal

You can post discussion topics and other team members can respond to them.

1. Access the team folder.
2. Click **Create team item**.

   The **Team Item** dialog box appears.
3. Click **Discussion**.

   The **Create Discussion** dialog box appears.
4. In the **Subject** field, enter the subject of the discussion.
5. From the **Category** list, select the category that relates to the subject.

   The default is **No category**.
6. In the **Content** field, enter a description of the discussion.
7. Select the **Can be viewed by all team members** check box to allow other team members to view the discussion.
8. Click to save.

Creating a bulletin team item in Client Portal

Bulletins allow team members to post announcements. Other members can create responses to the announcements.

1. Access the team folder.
2. Click **Create team item**.

   The **Team Item** dialog box appears.
3. Click **Bulletin**.

   The **Create Bulletin** dialog box appears.
4. In the **Title** field, enter the bulletin title.
5. In the **Subject** field, enter the topic of your bulletin.
6. In the **Details** field, enter a description of the bulletin.

7. Select the **Can be viewed by all team members** check box to allow other members to view the bulletin.
8. Click to save.

Adding an attachment team item in Client Portal

You can attach files to a team folder and make it accessible to all team members.

Note: Your sponsor's organization may exclude specific file types.

1. Access the team folder.
2. Click **Create team item**.

   The **Team Item** dialog box appears.
3. Click **Attachment**.

   The **New Attachment** dialog box appears.
4. In the **Attachment** field, click **Browse** to select the file.

   The file name must not contain slashes, quotation marks, or apostrophes.
5. In the **Title** field, enter a title for the attachment.
6. From the **Category** list, select the attachment category.
7. In the **Description** field, enter a description of the attachment.
8. Select the **Can be viewed by all team members** check box to allow other team members to view the attachment.
9. Click to save.

Downloading an attachment team item in Client Portal

1. Access the team folder.
2. Click the attachment you want to download.

   The **Attachment** dialog box appears.
3. Click .
4. Do one of the following:
   - To open the attachment, click **Open**.

- To select a location to download and save the file, click **Save**.

Creating an event team item in Client Portal

An event item allows team members to coordinate public and private events for the team.

1. Access the team folder.
2. Click **Create team item**.

   The **Team Item** dialog box appears.
3. Click **Event**.

   The **Create Event** dialog box appears.
4. From the **Event type** list, select **Public** or **Private**.
5. In the **Event title** field, enter a title for the event.
6. In the **Date** field, enter the date of the event.
7. From the **Start time** and **End time** fields, enter the start and end time of the event.
8. Enter event details in the **Description** field.
9. Select the **Can be viewed by all team members** check box to allow other team members to view the event item.
10. Click to save.

Creating a poll team item in Client Portal

Poll items gather group responses. For example, a software organization might distribute a poll for a new feature they want to add to a program. The team members vote and the creator of the poll examines the results to make a decision.

1. Access the team folder.
2. Click **Create team item**.

   The **Team Item** dialog box appears.
3. Click **Poll**.

   The **Create Poll** dialog box appears.
4. In the **Poll title** field, enter the name of the poll.

5. In the **Question** field, enter the question being posed for the poll.
6. In the **Answers** fields, enter the possible answers that team members can choose in response to the question.

   You must enter at least two possible answers and at most six possible answers.
7. Select the **Can be viewed by all team members** check box to allow other members to view the discussion.
8. Click to save.

Voting on a poll team item in Client Portal

1. Access the team folder.
2. Click the poll.

   The **Poll** dialog box appears.
3. Click .
4. Select a response.
5. Click .

Viewing poll results in Client Portal

1. Access the team folder.
2. Click the poll.

   The **Poll** dialog box appears.
3. Click .

   The results are displayed in percentages.

Responding to a team item (creating a sub-item) in Client Portal

You respond or add to discussion, bulletin, and event team items by creating sub-items. For example, to contribute to a discussion, you access the discussion team item, and add a discussion sub-item to it.

1. Access the team folder.
2. Click the team item you want to respond to.

The team item dialog box appears.

3. Click .

   The **Team Item** dialog box appears.

4. Click the team item type that you want to create.

5. Complete the fields as required. For more information, see the following sections:

   - "Creating a link team item in Client Portal" on page 22
   - "Creating a discussion team item in Client Portal" on page 23
   - "Creating a bulletin team item in Client Portal" on page 23
   - "Adding an attachment team item in Client Portal" on page 24
   - "Creating an event team item in Client Portal" on page 25
   - "Creating a poll team item in Client Portal" on page 25

Editing team items in Client Portal

You can only edit team items that you created.

1. Access the team item.
2. Click .
3. Make the necessary changes.
4. Click to save.

Deleting team items in Client Portal

You can only delete team items that you created.

1. Access the team item.
2. Click .
3. Click **OK** to confirm.

5. Workflow Reminders

Accessing a workflow reminder in Client Portal

If you are assigned a workflow step, you receive an email notification. You must respond to the workflow step through the **Workflow Reminders** view in Client Portal. The **Workflow Reminders** view displays the Changepoint entities (projects, opportunities, requests, resource requests) that have workflow enabled for your organization. The workflow steps that you have been assigned are displayed in the related entity section.

1. In the Applications bar, click **Workflow Reminders**.

   The **Workflow Reminders** view appears.

2. Click the entity name on the title of a section to view the workflow reminders for the entity.

3. To view the entity profile, in the **Reference** column, click the entity name (for projects and opportunities) or number (for requests and resource requests). The profile displays.

4. To progress the workflow step, you must return to the **Workflow Reminders** view.

Accessing a workflow step in Client Portal

1. In the Applications bar, click **Workflow Reminders**.

   The **Workflow Reminders** view appears.

2. Click the entity name on the title of a section to view the workflow reminders for the entity.

3. Click the link in the **Step name** column.

   The **Workflow** view displays the entity in the workflow, the name of the workflow step and the assignment.

4. Click the step name.

   The **step** dialog box appears.

5. Follow the instructions in the **Instructions** section. Documents or links attached to the step or entity are listed in the **Guidance or entity attachment** section. For more information, see the following:

   - "Processing an Action step in Client Portal" on page 30

- "Processing a Status step in Client Portal" on page 30
- "Processing an Upload step in Client Portal" on page 30
- "Processing a Tri-state approval step in Client Portal" on page 31

Processing an Action step in Client Portal

To process an **Action** step, you must perform a task and provide an approval. For example, review a document and approve or reject it.

1. Access the workflow step.
2. Follow the instructions in the **Instructions** section.
3. In the **Status** list, select a new status.

   If you select **Approved** or **Rejected**, the entity moves on to the next step in the workflow. If you select **In Progress**, **On Hold** or **Reassigned**, the entity remains in the current step of the workflow until the status is changed to **Approved** or **Rejected**.
4. Click **Save**.

Processing a Status step in Client Portal

To process a **Status** step, you must perform a task and then mark the task as completed. For example, arrange a team meeting and then mark it as completed after the meeting.

1. Access the workflow step.
2. Follow the instructions in the **Instructions** section.
3. In the **Status** list, select a new status.

   If you select **Completed**, the entity moves on to the next step in the workflow. If you select any other status, the entity remains in the current step of the workflow until the status is changed to **Completed**.
4. Click **Save**.

Processing an Upload step in Client Portal

To process an **Upload** step, you must upload a document. When a document is uploaded in a request workflow step, the file is stored as a knowledge item.

1. Access the workflow step.

2. If a template document is attached to the step:
   a. Save the document locally.
   b. Edit the document as required.
   c. Upload the edited document.
3. Click **Upload**.

   The **Create Knowledge Item** dialog box appears.
4. In the **Document title** field, enter the title of the file.
5. In the **Keywords** field, enter words that can be used when searching for the document. Separate keywords with a semicolon (;).
6. In the **Attachment** field, click **Browse** to locate the document.
7. In the **Web link** field, do one of the following:
   - For an Internet link, enter the complete URL including the protocol (for example, http:// or ftp://).
   - For a local network, enter the directory path (for example, \\foldername\changepoint\filename).
8. In the **File description** field, enter a description of the document.
9. Click **Save**.

   The **Create Knowledge Item** dialog box closes.
10. In the **Status** list, select a new status.

    If you select **Completed** status, the entity moves on to the next step in the workflow. The entity will remain in the current stage of the workflow until the status is changed to **Completed**.
11. Click **Save**.

Processing a Tri-state approval step in Client Portal

To process a **Tri-State Approval** step, you must perform a task, but the workflow process can branch out to several steps depending on your action and the status that you assign to the step.

1. Access the workflow step.

2. Follow the instructions in the **Instructions** section.
3. Select a new status.

   If you select **Approved**, **Canceled** or **Routed to**, the entity moves on to another step in the workflow. If you select **In Progress**, **On Hold** or **Reassigned**, the entity remains in the current stage of the workflow until the status is changed to **Approved**, **Canceled** or **Routed to**.
4. Click **Save**.

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