Sugar Ultimate 6.7 Portal User Guide

Sugar Ultimate 6.7 Portal User Guide
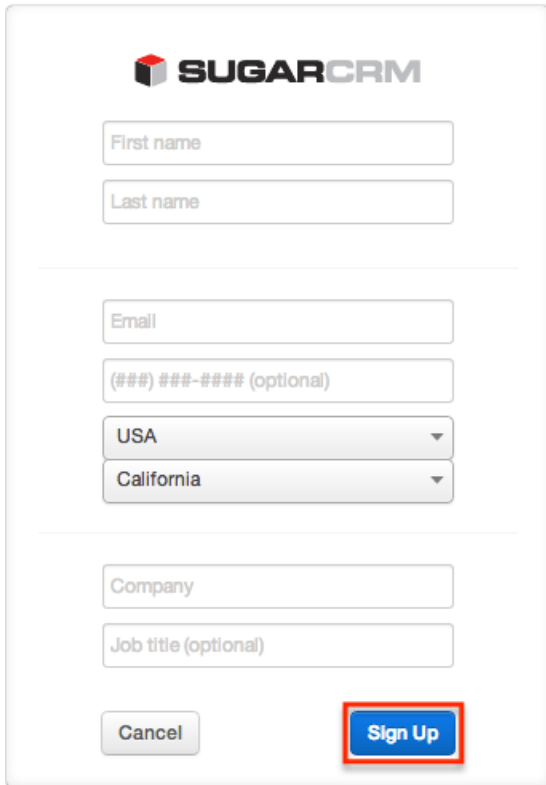
Overview

The customer portal allows you, the portal end user, to interact with a vendor so that you can submit and review bug reports and support cases, as well as review knowledge base articles. In addition, you can also view and update the contact information that the vendor has for you so that your data stays current in their system. The vendor has the option to customize what fields and information is available for you in the portal, so some of the information presented in this document may not be exact to what you are seeing in the portal. This document will explain how to best utilize all of the functionality available in the portal.

Login Page

The login page is where you will enter your user name and password that will grant you access to the portal. The user name and password will be provided to you by one of your contacts at the vendor who hosts the portal. If you are not already working with this vendor, you can [sign up](#) for the portal by providing contact information. Registered portal users can also use the [Forgot Password](#) link if need be. The language of the page and the rest of the portal can be changed in the [footer](#).

Sign Up

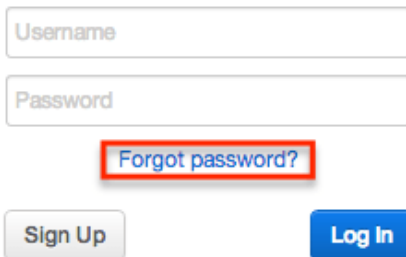If you have not yet worked with this vendor, you can gain access to their portal by using the Sign Up button on the login page of the portal. After clicking "Sign Up", you will be presented with a page to enter information about yourself. Enter the necessary information and then click "Sign Up". The information will be sent to the vendor where a representative can create your account and contact you with a user name and password.

Forgot Password

If you have forgotten your password for the portal, this link will remind you to contact your customer service representative at the vendor. The password cannot be updated from the login page, but this can be made by a change on your record in the vendor's system.

Footer

The footer of the page allows you to update the language of the page and any subsequent pages after logging in. The language on the page will update as soon as it is changed on the dropdown menu on the footer. Simply click on the "Language" button and scroll through the menu to select your preferred language.
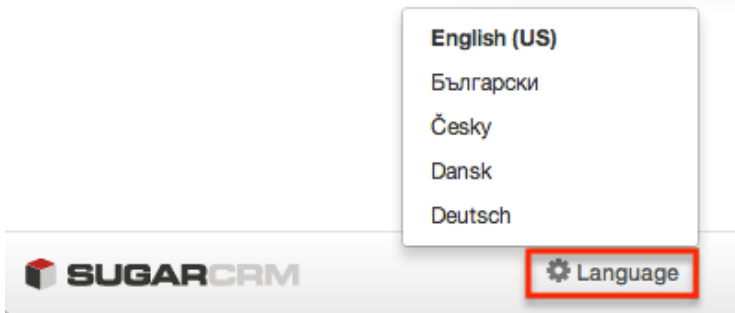
User Interface

Once you are signed in, the portal user interface provides you with a simple, streamlined, and intuitive interface to access the information that you are looking for. Every page on the interface will contain the header and footer. Clicking on the cube in the top left or the logo in the bottom left of any page will return you to the

Header

The header is shown at the top of every page in the portal. The header contains multiple functional options that will help you navigate through the portal. Clicking on the cube in the left of the header will return you to the dashboard for your portal user.
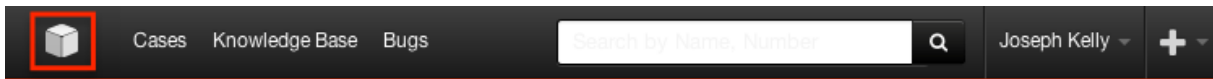
Module Tabs

The module tabs, Cases, Knowledge Base, and Bugs, allow you to select a module in the portal that you would like to view. Clicking a module tab will bring you to the module's list view, which shows a list of all of the available records for you to view. From the list view, you will be able to see key fields, or you can click the record's name to open the record in detail view. For information on viewing records in each module, please refer to the specific module sections below.

Global Search

The global search allows portal users to search for information across all available

records in the portal, as opposed to restricting search within a specific module. The global search bar is located on the top right hand side of the portal.

The search will search throughout following fields in each module:

Module	Fields
Bugs	- Bug Number - Subject
Cases	- Case Number - Subject
Knowledge Base	Article Title

To use the global search, you need to first enter the keyword into the search box. Popup results will begin appearing once you start typing.

Please note that the portal automatically appends a wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

Clicking on the magnifying glass, or clicking "View all results", will bring you to a full list of records that match your search criteria. Clicking on any record's name will bring you to the full detail view of the record. Clicking on the eyeball to the right of the record will open a preview of the record so you can easily see some of the important details, while keeping the list of results open.
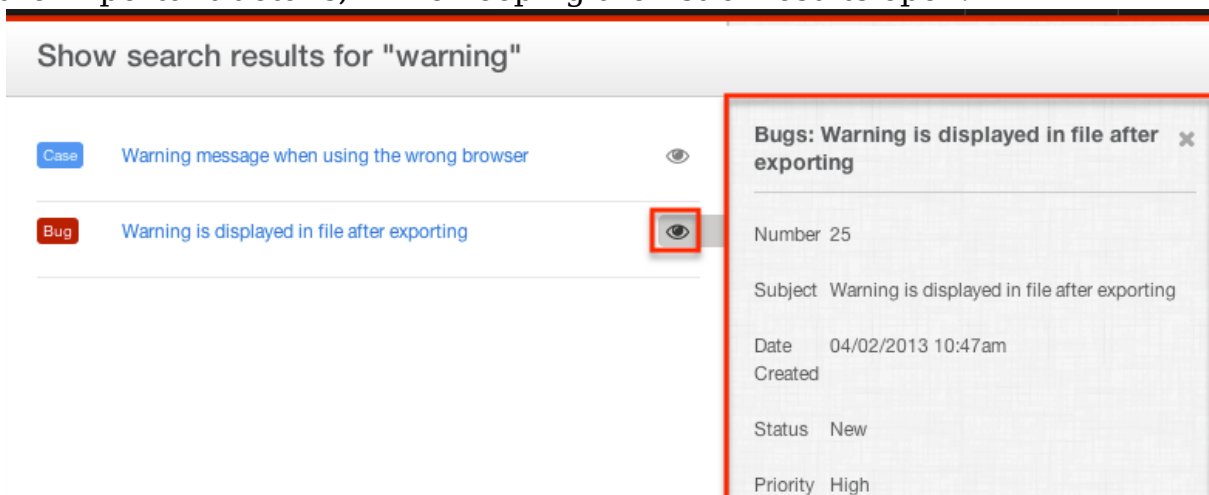
User Name

The User Name dropdown menu allows you to access your portal user profile and also the Log Out function by simply clicking on your name. For more information about what is contained in the user profile, please refer to the User Profile section of this documentation. To log out of the portal, simply click "Log Out" on the dropdown list.
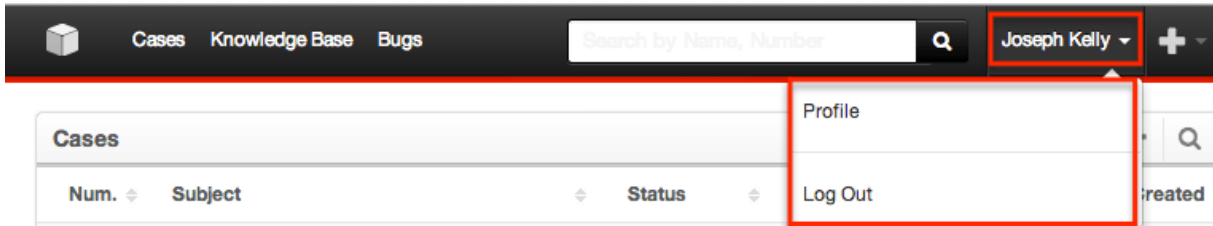
Quick Create

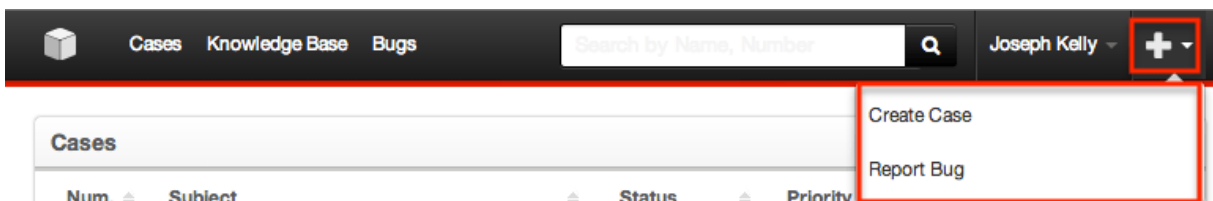The Quick Create menu allows you to easily create new cases or bugs from anywhere in the portal. Simply click the quick create button on the upper right of all portal pages to access the menu. Clicking on an item in the Quick Create menu will bring you to either the create case form or report bugs form, depending on which option was selected.

Footer

The footer displays four options that can be used for navigation and functionality around the portal. The footer consists of the following from left to right:

- Logo : Clicking on the vendor's logo will return you to the dashboard for your portal.
- Tour : Launches the Portal Tour to display some important features of the portal and a quick guide on navigation.
- Print : Open a print dialog for the current page so that you can print out a paper copy of the current page.
- Top : Instantly return to the top of the current page.

Dashboard

The home page of the portal consists of a dashboard with panels for [Cases](), [Knowledge Base](), and [Bugs](). Each panel will show a list of the records that are available for you to view through the portal. You can access more records by clicking the module's name in the top left of the panel. You can also create new records by clicking the plus (+) button or search the module by clicking the magnifying glass, both in the top right corner. Finally, you can view more details on each record than what is presented on the list by clicking the record's name or subject. Return to this dashboard at any time by clicking the cube in the [header]() or the logo in the [footer]().

Bugs

The Bugs section of the portal lets you review any product related defects that have been reported to them or that they have reported. This module also allows you to submit any bugs that you find so that the vendor can work on fixing them in future releases.

Note: Bugs are visible by all of your vendor's portal users, not just you or members of your organization.

Bugs Fields

The Bugs module allows you to see all details in the fields from the vendor's own bug tracker that they share. The below fields are the available fields that can be shown in the portal. The portal may include additional fields, and may not include all of the fields below.

Field	Description
Assigned To	The vendor's user assigned to the bug
Category	The section of the product where the bug was discovered or what it relates to
Date Created	The date the bug report was created
Date Modified	The date the bug report was last modified
Description	Explanation of the details and

	reproduction steps of the bug when submitted
Fixed in Release	The version or product where the bug was fixed
Found in Release	The version of product where the bug was found
Number	A number to identify every bug
Priority	The urgency of the bug
Resolution	Results of the investigation of the bug and how it can be fixed
Source	The method in which this bug was submitted, such as internal or from a customer
Status	The status of the bug as it moves along the process from submission to resolution
Subject	Brief statement of the problem
Type	Type of categorization that this bug falls in to, such as Defect or Feature
Work Log	A chronological list of activities and actions while working on the bug

Creating Bugs

When accessing the portal, you can create bug reports in the vendor's system through two different methods, either from the dashboard or from the quick create. When creating a bug, you will be brought to full create page on the portal which will give you access to fill in any necessary fields that allow you to best report the bug to the vendor. Please note that when you create a bug, it is viewable by all of your vendor's portal users, not just you or members of your organization.

Note: Once the bug has been created, you do not have the option to edit it through the portal. This must be done by a representative from your vendor.

Creating Bugs Via Dashlets

The most common methods of bug submission are via the Report Bug option in the Bugs module tab or from the dashboard. This opens up the edit view layout which allows you to enter in all the relevant information for the bug.

Use the following steps to submit a bug via the Bugs list view:

1. Click on the Bugs tab in the header of the portal or the cube icon
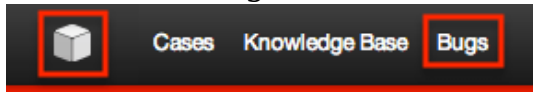
2. Click on the plus (+) sign in the top right of the Bugs list to report a new bug

3. Enter appropriate values for the fields in the edit view layout
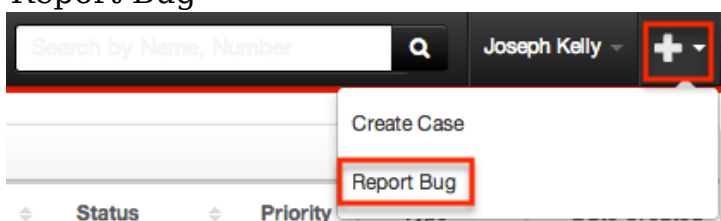4. Once the necessary information is entered, click "Save"

Creating Bugs Via Quick Create

The Quick Create option is a fast and easy way to create a bug from anywhere in the portal. Clicking on the Report Bug option in the quick create dropdown list will open up the edit view layout which allows you to enter in all the relevant information for the bug.

Use the following steps to submit a bug via the Quick Create:

1. Click on the Quick Create button in the header of the portal and select "Report Bug"

2. Enter appropriate values for the fields in the edit view layout
3. Once the necessary information is entered, click "Save"

Viewing Bugs

When accessing the portal, there are two ways to view information about bugs. Bugs can be viewed from the record's detail view and also from the dashlet on the home page and under the Bugs tab.

Viewing Bugs Via Detail View

The Bugs detail view displays thorough bug information including all bug fields followed by notes submitted by both engineers who work for the vendor, as well as other portal users from other companies that are inquiring about the same bug. The detail view can be reached by clicking a bug record's link from anywhere in the portal including from the Bugs list view. For more information on viewing bugs via detail view, please refer to the Bugs Detail View section of this documentation.
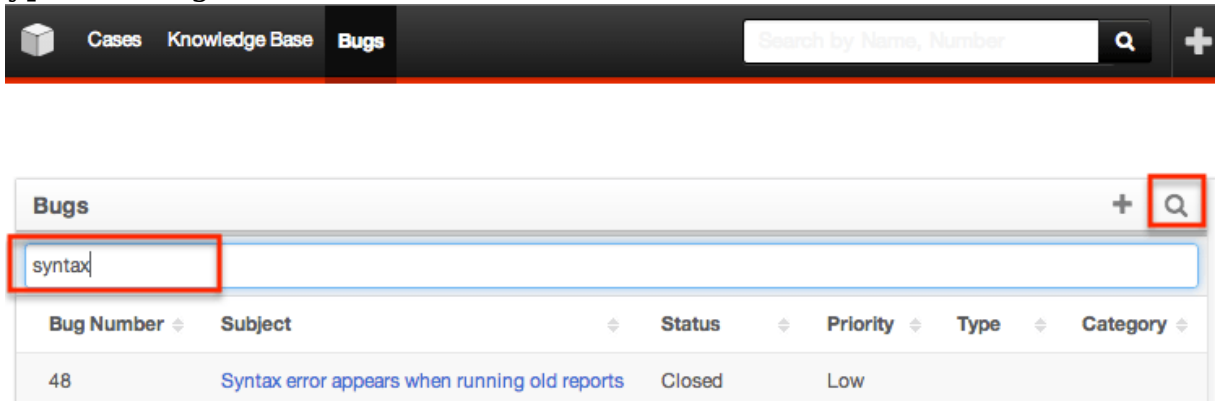
Viewing Bugs Via Dashlet

The Bugs list view dashlet displays all bug reports meeting the current search criteria. To access the dashlet, simply click the Bugs module tab or navigate to the

Searching Bugs

The Bugs dashlet includes a search bar to help you locate bugs easily and effectively. Once the search is performed, the relevant results will be displayed in the Bugs list view below. The global search bar in the header allows you to search for information across their entire portal, as opposed to restricting search within a specific module. Please note that the portal automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %system). This will pull up any record that has the word "system" in the name, regardless of how it starts or ends.
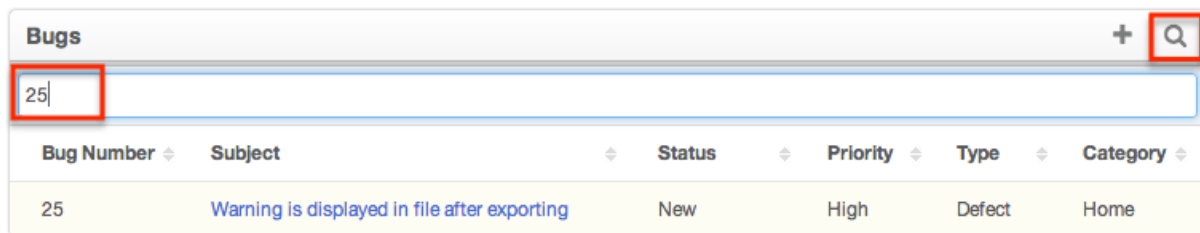
Searching Bugs Via Bugs Module

When accessing the bugs module via the header, you will see a dashlet and a list of the most recently submitted bugs. At the top right side of this list, there is a magnifying glass. When clicked, a search bar will appear, allowing you to search for the name or number of a specific bug. The list below will begin to filter as you type showing the relevant results.

Searching Bugs Via Dashlet

Bugs can be searched from the dashboard by utilizing the search bar in the Bugs dashlet. At the top right side of dashlet, there is a magnifying glass. When clicked, a search bar will appear, allowing you to search for the name or number of a specific bug. The list below will begin to filter as you type showing the relevant results.


Searching Bugs Via Global Search

You can run a search on the bugs module from any section of the portal using the global search bar in the header. After the search is complete, click on the bug you would like to review to be brought to the record's detail view. For more information on using the global search option, please review the Global Search section of this documentation.
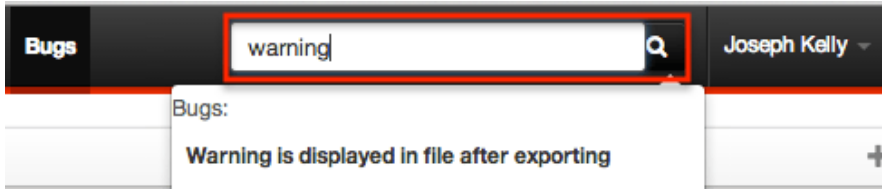
Bugs List View

The Bugs list view displays all bug reports meeting the current search criteria on either the [dashboard](#) or after clicking the Bugs tab in the [header](#). The list view contains basic details of each bug within the field columns. Clicking on any bug's subject name will bring you to that record's [detail view](#).

The list view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time.

List view displays the current search results broken into a singe page. If there are more records to view than what is currently displayed, there will be a Show More Bugs button at the bottom of the list. Clicking this button will expand the list to show the next set of matches.

Bugs Detail View

The Bugs detail view displays thorough bug report information including all bug fields which are grouped into a default group and another grouping after clicking "Show More". You can also view any notes attached to a bug, which appear beneath the bug fields. The detail view can be reached by clicking a bug's link from anywhere in the application including from the [Bugs list view](#).

Clicking on the note's subject or the preview eye button will display the note on a panel to the right of the detail view showing all relevant information. In addition, if there are any file attachments to the note, they can be downloaded from the preview panel.

Adding Notes to Bugs

Using the portal, you can add notes to the bug report with any information that you have about the bug or any questions you have for your vendor. These notes will show in the portal to other customers and will also attach to the record so that the vendor can see the notes. This can be used as a method of communication to

the vendor as they work to address these bugs.

To add a note to a bug, please perform the following steps:

1. Navigate to the detail view of the bug
2. Click "Add Note" below the bug fields

3. Fill in the fields on the popup that appears with the appropriate information you would like to communicate to the vendor. If you would like to add a file attachment, click "Choose File" to be given the option to add a file from your computer. Once all fields are complete, click "Save".

Cases

The cases section of the portal allows you to submit support related issues that you run in to so that the vendor can work on rectifying them for you. This module also lets you view any of your vendor's cases that have been reported to this vendor and perform actions such as tracking the status of the case and attaching notes to the case for the support representative to read and process.

Cases can be seen by all portal users associated with your company. However, no one from other companies will be able to view your cases.

Cases Fields

The Cases module allows you to see all details in the fields from the vendor's own case management database that they share. The below fields are the available fields that can be shown in the portal. The portal may include additional fields, and may not include all of the fields below.

Field	Description
Assigned To	The vendor's user assigned to the case
Case Number	A number to identify every case
Date Created	The date the case was created
Date Modified	The date the case was last modified
Description	Explanation of the details and reproduction steps of the case when submitted
Priority	The urgency of the case
Resolution	Results of the investigation into the problem
Status	The status of the case as it moves along the process from submission to resolution
Subject	Brief statement of the problem
Type	Type of categorization that this case falls in to, such as administrative or a product issue
Work Log	A chronological list of activities and actions taken by the support representative while working on the bug

Creating Cases

When accessing the portal, you can create submit cases directly to the vendor's system through two different methods, either from the dashboard or from the quick create. When creating a case, you will be brought to a full form on the portal to complete and report the issue to your vendor. Please note that cases can be seen by all portal users associated with your company. However, no one from other companies will be able to view your cases.

Note: Once the case has been created, you do not have the option to edit it through the portal. This must be done by a representative from your vendor.
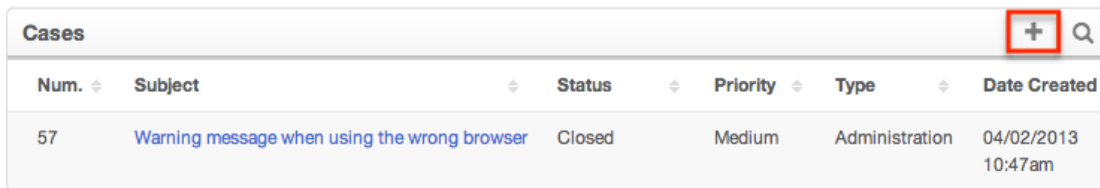
Creating Cases Via Dashlets

The most common method of case submission is via the Create Case option in the Cases module tab or from the [dashboard](). This opens up the edit view layout which allows you to enter in all the relevant information for the case.
Use the following steps to submit a case via the Cases list:
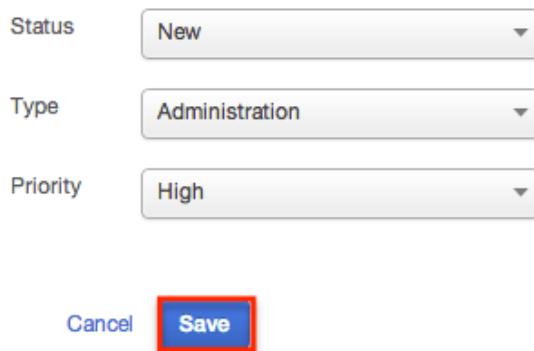
1. Click on the Cases tab in the header of the portal or the cube icon
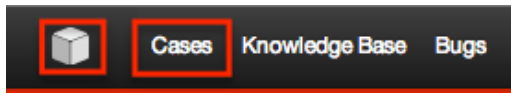
2. Click on the plus (+) sign in the top right of the Cases list to report a new case

3. Enter appropriate values for the fields in the edit view layout
4. Once the necessary information is entered, click "Save"

Creating Cases Via Quick Create

The Quick Create option is a fast and easy way to create a case from anywhere in the portal. Clicking on the Create Case option in the quick create dropdown list will open up the edit view layout which allows you to enter in all the relevant information for the case.

Use the following steps to submit a case via the Quick Create:

1. Click on the Quick Create button in the [header]() of the portal and select "Create Case"

2. Enter appropriate values for the fields in the edit view layout
3. Once the necessary information is entered, click "Save"

Viewing Cases
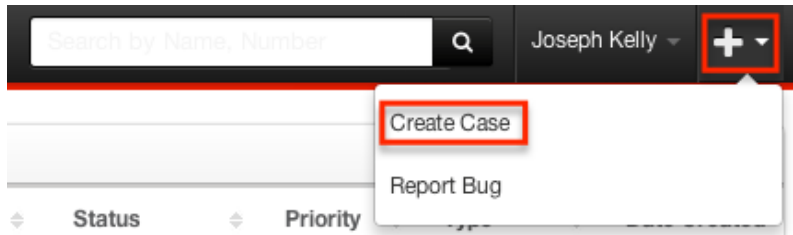
When accessing the portal, there are two ways to view information about cases. Cases can be viewed from the record's detail view and also from the dashlet on the home page and under the Cases tab.

Viewing Cases Via Detail View

The Cases detail view displays thorough case information including all case fields followed by notes submitted by both support representatives who work for the vendor, as well as other portal users from your vendor that are working on the same case. The detail view can be reached by clicking a case record's link from anywhere in the portal including from the Cases list view. For more information on viewing cases via detail view, please refer to the Cases Detail View section of this documentation.

Viewing Cases Via Dashlet

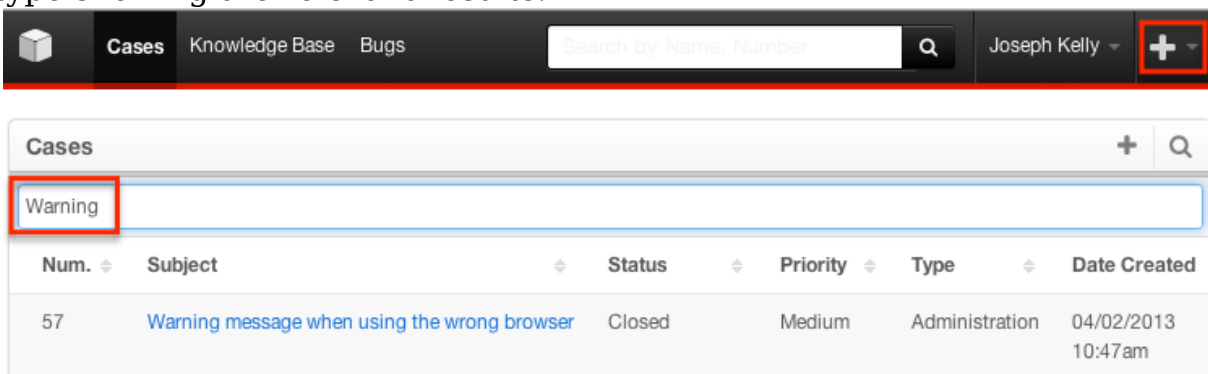The Case list view dashlet displays all cases meeting the current search criteria. To access the dashlet, simply click the Cases module tab or navigate to the dashboard. While the dashlet shows key case fields, you can click the case's subject to open the record in detail view. For more information on viewing cases via list view, please refer to the Cases List View section of this documentation.

Searching Cases

The Cases dashlet includes a search bar to help you locate cases easily and effectively. Once the search is performed, the relevant results will be displayed in the Cases list view below. The global search bar in the [header](#) allows you to search for information across their entire portal, as opposed to restricting search within a specific module. Please note that the portal automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %system). This will pull up any record that has the word "system" in the name, regardless of how it starts or ends.

Searching Cases Via Cases Module

When accessing the cases module via the [header](#), you will see a dashlet and a list of the most recently submitted cases. At the top right side of this list, there is a magnifying glass. When clicked, a search bar will appear, allowing you to search for the name or number of a specific case. The list below will begin to filter as you type showing the relevant results.

Searching Cases Via Dashlet

Cases can be searched from the [dashboard](#) by utilizing the search bar in the Cases dashlet. At the top right side of dashlet, there is a magnifying glass. When clicked, a search bar will appear, allowing you to search for the name or number of a specific case. The list below will begin to filter as you type showing the relevant results.

Searching Cases Via Global Search

You can run a search on the cases module from any section of the portal using the global search bar in the header. After the search is complete, click on the case you would like to review to be brought to the record's detail view. For more information on using the global search, please review the Global Search section of this documentation.

Cases List View

The Cases list view displays all cases meeting the current search criteria on either the dashboard or after clicking the Cases tab in the header. The list view contains basic details of each case within the field columns. Clicking on any case's subject name will bring you to that record's detail view.

The list view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time.

List view displays the current search results broken into a singe page. If there are more records to view than what is currently displayed, there will be a Show More Cases button at the bottom of the list. Clicking this button will expand the list to show the next set of matches.

Cases Detail View

The Cases detail view displays thorough case information including all case fields which are grouped into a default group and another grouping after clicking "Show More". You can also view any notes attached to a case, which appear beneath the case fields. The detail view can be reached by clicking a case's link from anywhere in the application including from the [Cases list view](#).

Clicking on the note's subject or the preview eye button will display the note on a panel to the right of the detail view showing all relevant information. In addition, if there are any file attachments to the note, they can be downloaded from the preview panel.
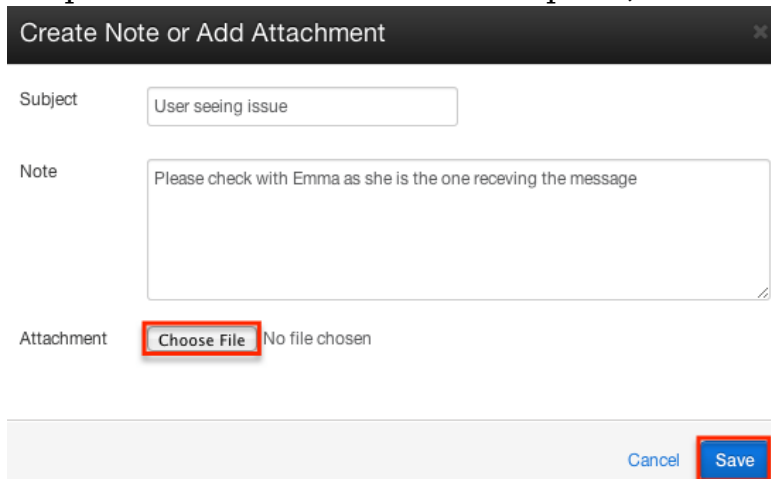
Adding Notes to Cases

Using the portal, you can add notes to the case with any information that you have about the case or any questions you have for your vendor. These notes will show in the portal to other portal users from your company and will also attach to the case so that the vendor can see the notes. This can be used as a method of communication to the vendor as they work to resolve your support case.

To add a note to a case, please follow the following steps:

1. Navigate to the detail view of the case.
2. Click "Add Note" below the case fields.

3. Fill in the fields on the popup that appears with the appropriate information you would like to communicate to the vendor. If you would like to add a file attachment, click "Choose File" to be given the option to add a file from your computer. Once all fields are complete, click "Save".

Knowledge Base

The knowledge base section of the portal allows you to review articles published by the vendor for instructions, common troubleshooting issues, and more. The Knowledge Base is a useful resource to review first before filing a [Case] or a [Bug] to see if the answer to your issue is already published by the vendor.

Knowledge Base Fields

The Knowledge Base module allows you to see all details in the fields from the vendor's Knowledge Base that they share. The below fields are the available fields that can be shown in the portal. The portal may include additional fields, and may not include all of the fields below.

Field	Description
Approver	The employee of the vendor that approved the article
Attachments	Any files attached to the article
Author	The employee of the vendor that wrote and owns the article
Body	The content of the article
Expiration Date	The date the article information is expired and no longer available in the portal
Revision	The article's current revision number
Tags	The topics or categories are related to the article
Title	The title or designation of the article

Viewing Knowledge Base Articles

When accessing the portal, there are two ways to view Knowledge Base articles. Articles can be viewed from the record's detail view and also from the dashlet on the home page and under the Knowledge Base tab.

Viewing Articles Via Detail View

The Knowledge Base detail view displays the actual information provided in the article, as well as additional details about the article itself. The detail view can be reached by clicking an article's link from anywhere in the portal including from the Knowledge Base list view. For more information on viewing bugs via detail view, please refer to the Knowledge Base Detail View section of this documentation.

Viewing Articles Via Dashlet

The Knowledge Base list view dashlet displays all articles meeting the current search criteria. To access the dashlet, simply click the Knowledge Base module tab or navigate to the dashboard. While the dashlet shows fields about the details of the article, you can click the article's subject to open the record in detail view. For more information on viewing articles via list view, please refer to the Knowledge Base List View section of this documentation.
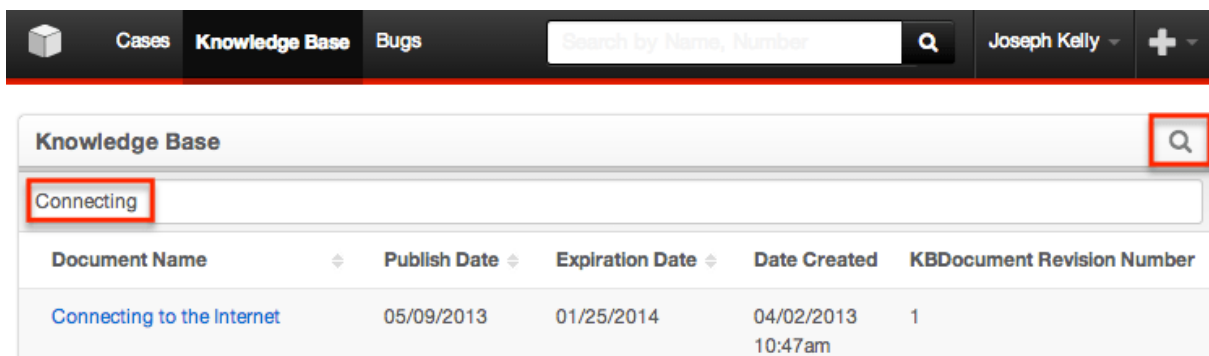
Searching Knowledge Base Articles

The Knowledge Base dashlet includes a search bar to help you locate articles easily and effectively. Once the search is performed, the relevant results will be displayed in the Knowledge Base list view below. The global search bar in the header allows you to search for information across their entire portal, as opposed to restricting search within a specific module. Please note that the portal automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %system). This will pull up any article that has the word "system" in the name, regardless of how it starts or ends.

Note: Only the article's name is searched through the portal, not the body or any other fields.

Searching Articles Via Knowledge Base

When accessing the Knowledge Base via the header, you will see a dashlet and a list of articles. At the top right side of this list, there is a magnifying glass. When clicked, a search bar will appear, allowing you to search for the name of the article you would like to view. The list below will begin to filter as you type, showing the relevant results.


Searching Articles Via Dashlet

Bugs can be searched from the [dashboard](#) by utilizing the search bar in the Knowledge Base dashlet. At the top right side of dashlet, there is a magnifying glass. When clicked, a search bar will appear, allowing you to search for the name of the article you would like to view. The list below will begin to filter as you type, showing the relevant results.

Searching Articles Via Global Search

You can run a search on the Knowledge Base from any section of the portal using the global search bar in the header. After the search is complete, click on the article you would like to review to be brought to the record's [detail view](#). For more information on using the global search, please review the [Search](#) section of this documentation.
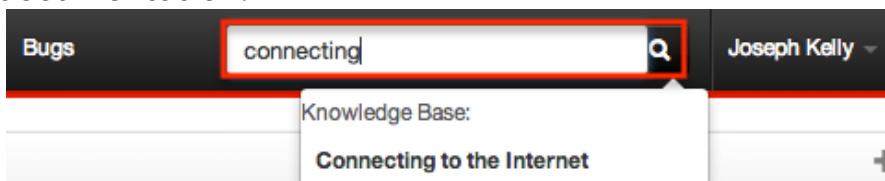
Knowledge Base List View

The Knowledge Base list view displays all articles meeting the current search criteria on either the [dashboard](#) or after clicking the Knowledge Base tab in the [header](#). The list view shows fields about the details of the article. Clicking on any articles title will bring you to that article's [detail view](#).

The list view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. The list view may be sorted by only one column at a time.

List view displays the current search results broken into a singe page. If there are more records to view than what is currently displayed, there will be a Show More Articles button at the bottom of the list. Clicking this button will expand the list to show the next set of matches.

Knowledge Base Detail View

The Knowledge Base detail view displays the actual information provided in the article, as well as additional details about the article itself. You can also view any file attachments to the article which appear at the bottom of the screen. The detail view can be reached by clicking an article's link from anywhere in the application including from the [Knowledge Base list view](#).

User Profile

The user profile section of the portal lets you review your contact information that

the vendor has for you and also allows you to update portal information, such as your password and preferred language. Making changes in this section will update the vendor's database information for you, so be sure to update this section if any of your contact information changes.

User Fields

The User Profile allows you to see all contact information from the vendor's database that they share. The below fields are the available fields that can be shown in the portal. The portal may include additional fields, and may not include all of the fields below.

| Field	Description
Assigned To	The employee who is your primary contact at the vendor
Assistant	The name of the your assistant within your vendor
Assistant Phone	The assistant's phone number
Birthdate	Your date of birth
Date Created	The date you were entered in their system
Date Modified	The date your contact information was last modified
Department	The department of which you are associated within your vendor
Description	A description or other information about you
Do Not Call	Indication that you should not be called
Email Address	Your email address Note: Additional email addresses can be added using the + button below your current address
Fax	Your fax number
First Name	Your first name
Home	Your residence number
Last Name	Your last name
Mobile	Your mobile number
Office Phone	Your office number
Other Address	Your alternate address (e.g. billing or shipping)

Other Phone	Your alternate phone number
Portal Name	Your user name for accessing the portal
Portal Password	Your password for accessing the portal
Preferred Language	Your preferred language when accessing the portal
Primary Address	Your primary address
Salutation	Standard greeting for you (e.g. Mr., Ms., Mrs., etc.)
Title	Your title within your company

Editing User Profile

You can edit your user profile at any time in the portal using by clicking your name in the [header](). Clicking on the "Profile" option will open the details of your portal user profile. The details will show some of the pertinent contact information about yourself.

Use the following steps to edit your User Profile from the detail view:

1. Click on the Edit button in the top-right side of the profile.
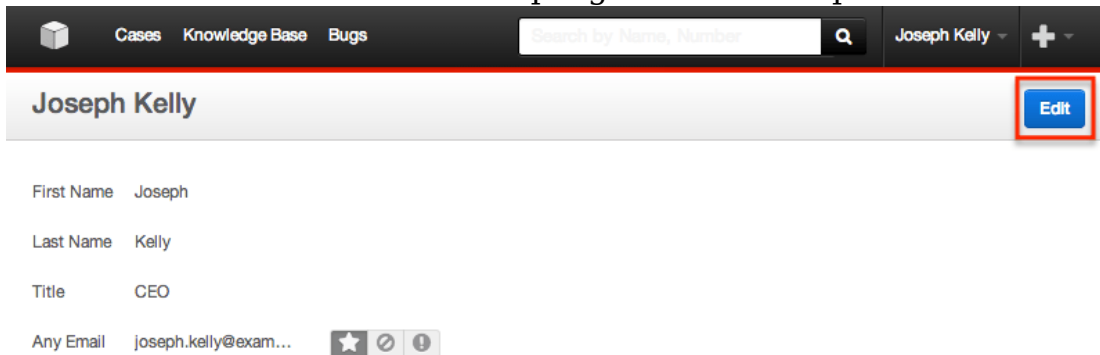
2. Enter appropriate values for the fields you would like to update in the edit view layout
   Note: To update your password, click the "Change Password" link where you will be allowed to enter in your new password.
3. Once the necessary information is entered, click "Save"

Last Modified: 09/26/2015 06:25pm