Sugar Ultimate 7.9 Portal User Guide

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Overview

The customer portal allows you, the end portal user, to interact with your vendor so that you can submit and review bug reports, support cases, as well as review knowledge base articles. In addition, you can view and update your contact information via the portal which allows you to keep your information up-to-date in the vendor's system. This documentation will cover how to use the portal as well as the various actions and options available in the portal.

Login Page

The login page is where you will enter your username and password that will grant you access to the portal. The username 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 your contact information.

Sign Up

If you wish to gain access to the portal, you will need to sign up for an account by clicking the Sign Up button on the portal's login page. Please complete the required fields on the online form then click "Sign Up". Once this online form has been submitted, the portal request will be sent to the vendor where a representative will create your account and provide your portal username and password.
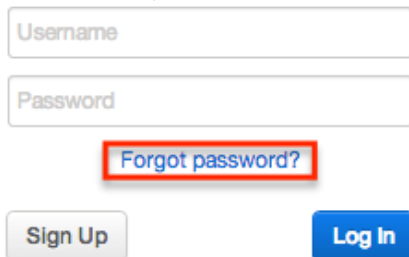
Forgot Password

If you have forgotten your password for the portal, please reach out to your customer service representative at the vendor. Clicking the Forgot password link on the login screen will display a message informing you to reach out to the vendor as well. The customer service representative will be able to update your password in their system and provide the necessary information.

Footer

You have the option to choose the primary language you want displayed in the portal by clicking the Language icon on the bottom right of the Login screen. The language dropdown list will appear allowing you to select the appropriate language you want displayed in your portal account.

User Interface

Once you are logged in, the portal user interface provides you with a simple, streamlined, and intuitive interface to access the appropriate information you are looking for. Every page of the portal will display the navigation bar where you can access various modules, perform a global search, etc. Clicking the Sugar Cube icon on the upper left of the screen or the logo on the bottom left of any page will return you to the Home page.

Navigation Bar

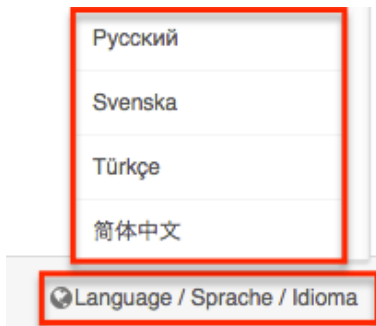All pages within the portal display a navigation bar spanning across the top of the screen. The navigation bar allows you to access the the various modules, perform a global search, etc.

The navigation bar consists of the following options from left-to-right:

Navigation Item	Description
Home	Click the Sugar Cube icon on the upper left to access the Home page dashboard.
Module Tabs	The Knowledge Base, Cases, and Bugs modules display on the navigation bar. Click the triangle within each tab to display the Actions and Recently Viewed menu.
Global Search	Enter keywords (e.g. case subject, document name, bug number, etc.) into the global search bar to search for information across the entire portal.

User Menu	Click the user profile image to display the user menu, which allows access to your profile, etc.
Quick Create	Click the Plus icon to display the Quick Create menu.

Module Tabs

Module tabs are located to the right of the Sugar Cube icon on the navigation bar at the top of any portal screen. To access the specific module's list view, simply click the Cases, Knowledge Base, or Bugs module tab. You can also click the triangle within the module tab to display the Actions and Recently Viewed menu. The Actions menu allows you to perform important actions within the module. The Recently viewed menu displays the list of record you last viewed in the module.
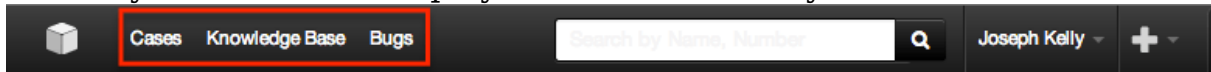
Global Search

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.

Global search will only search the following fields in the module when returning results:

Module	Fields
Bugs	Bug Number Subject
Cases	Case Number Subject
Knowledge Base	Document Name

To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character.

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. %warning). This will pull up any record that has the word "warning" in the name, regardless of how it starts or ends.

Clicking "View all results", will bring you to a full list of records that match your search criteria. Click the record's name in the search result's list or preview pane to open the record view. Clicking the Preview icon to the right of each search result will display a preview of the record so you can easily view key information. On the upper right of the preview pane, there are two buttons that allow you to scroll through the records in the current global search results. Clicking the Left arrow button displays the previous record of the current search results while clicking the Right arrow button displays the next record of the current search results. To close the preview, simply click the "X" on the upper right of the preview pane. In addition, clicking the double arrow icon to the left of the preview pane will expand the search results page to the full screen width. The preview pane to the right of the search results will be hidden when the search results page is expanded. To reduce the search result page's width and reveal the preview pane, simply click the double arrow icon again.
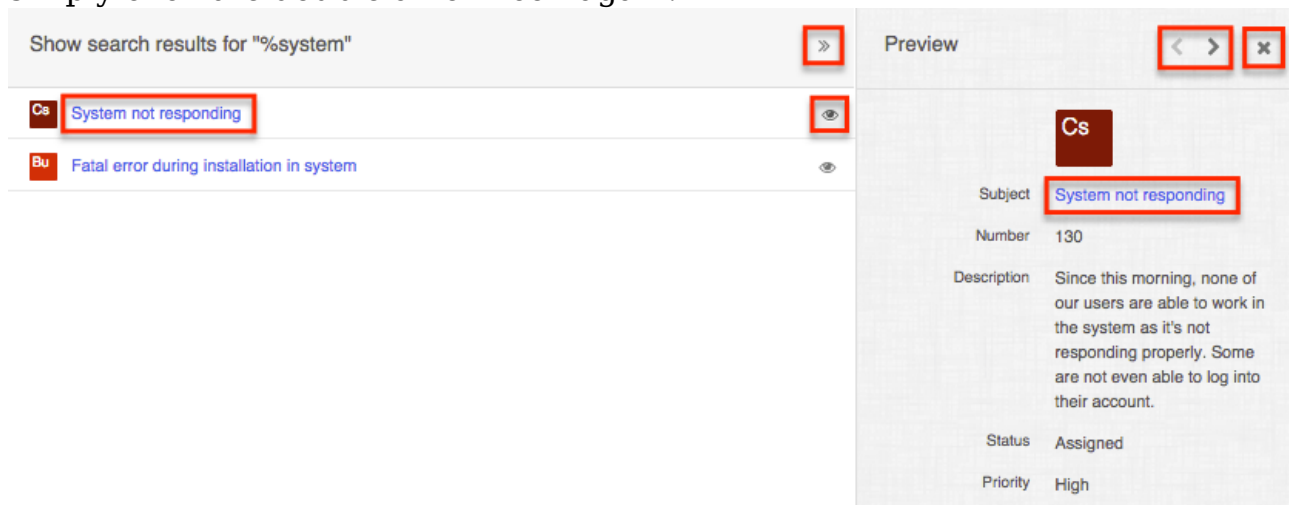
User Menu

A profile image icon will display on the upper right of the portal and you can click this to display the user menu where you can access your profile or log out of the portal. Please note that you can upload an image via your user profile to display as your main profile image in the portal. For more information on updating your user profile, please refer to the User Profile section of this documentation. Selecting the Log Out option will log you out of your current user session and direct you back to the main login page.
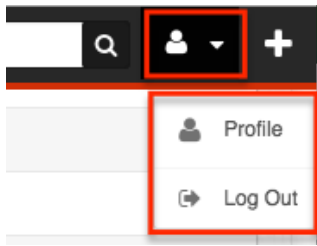
Quick Create

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 any portal page to access the menu. Clicking on an item in the Quick Create menu will open the record view form for the specific module. All required fields will indicate "Required" in the field and must be completed prior to saving.
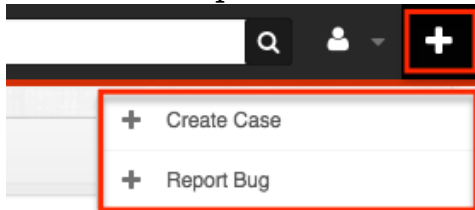
Footer

The portal's footer displays links that can be used to go back to the Home page, as well as launch a quick tour. The following links are available in the portal's footer:

- **Logo** : Click the logo on the bottom left of the portal to go back to the [Home page](#).
- **Tour** : Launches a quick tour to display some key features of the portal and a quick guide on navigation.
- **Support** : Opens the Portal user guide where you can access information on utilizing the portal.
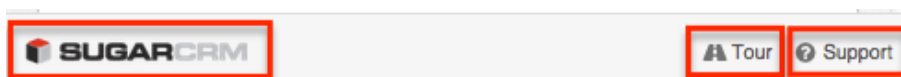
Home

The portal's home page consists of a dashboard containing the [Knowledge Base](#), [Cases](#), and [Bugs](#) dashlets. Each dashlet displays a list of records with some basic details and you can click the More "Module Name" (e.g. More bugs) link at the

bottom of the dashlet to view any additional records. Please note that the dashlet's height increases slightly when loading the next set of matching results. Clicking the dashlet's title (e.g. Knowledge Base) will direct you to the module's list view. You can also create new records by clicking the Plus button on the upper right of the dashlet and the module's record view layout will open allowing you to enter the relevant information. The Magnifying Glass icon to the right of the Plus button allows you to toggle viewing the search bar or closing it on the dashlet. To perform a search, enter in the appropriate search term and the relevant results will display in the list view below. To view more details of each record, simply click the record's name or subject (e.g. Syntax error appears when running reports) in the list view. As you navigate around the portal, you can return to the Home page at any time by clicking the Sugar Cube icon on the upper left of the screen.

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 to all other portal users and not just to portal users within

your organization.

Bugs Fields

The Bugs module contains a number of stock fields that will be used to enter all relevant information when reporting the bug. Below is a list of available fields that can be displayed in the portal. Please note that depending on what fields the vendor decides to display in the portal, some of the fields may not be available.

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
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

There are various methods for creating bugs in the portal including via the Bugs module, Bugs dashlet, and quick create. The same record view layout opens when creating the bug via these various methods and includes all of the relevant fields you need to report the issue to the vendor. Please note that the created bug will be viewable by all other portal users and not just to portal users within your organization.

Note: Once the bug has been created, you do not have the option to edit the record view via the portal. Any necessary change can be made by a representative from your vendor.

Creating Bugs Via Module

One of the most common methods of bug creation is via the Bugs module using the Report Bug option in the module tab or the Create button on the list view. This opens up the record view layout which allows you to enter all of the relevant information for the bug.
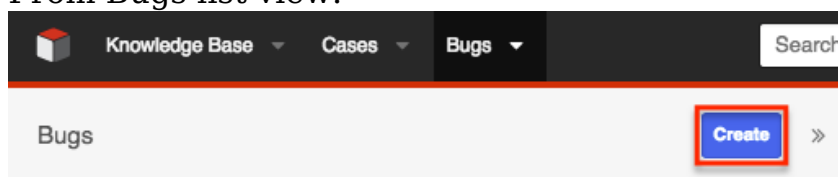
Use the following steps to report a bug via the Bugs module:

1. Click the triangle in the Bugs module tab to open the Actions menu and select "Report Bug". You can also click the Create button on the upper right of the Bugs list view.
   From Bugs module tab:
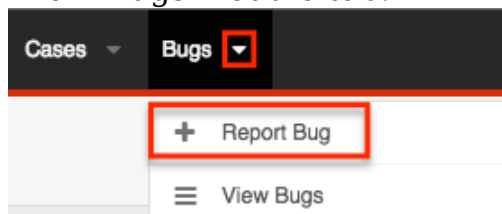
   From Bugs list view:

2. Enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
   - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the bug's details after the save is complete. "Save and create new" saves the current bug record and opens a new, blank record view in edit mode where you can create another bug.
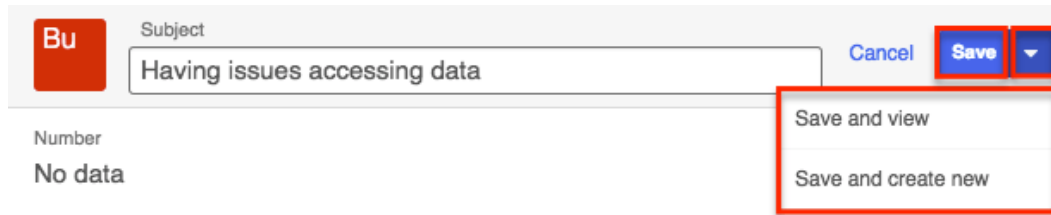
Creating Bugs Via Dashlet

A bug can also be created via the Bugs dashlet on the Home page. This opens the record view layout which allows you to enter all of the relevant information for the bug.
Use the following steps to report a bug via the Bugs dashlet:

1. Navigate to the portal's Home page.
2. Click the Plus button on the upper right of the Bugs dashlet.
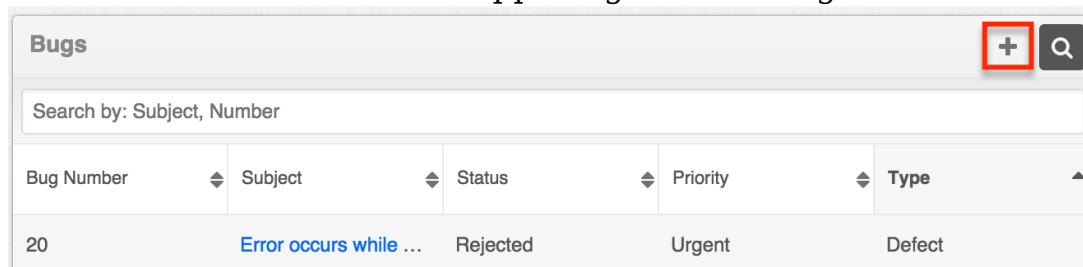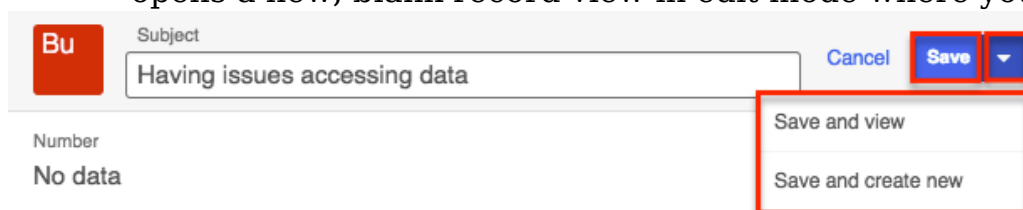

3. Enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
4. Once the necessary information is entered, click "Save".
   - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create


Creating Bugs Via Quick Create

The Quick Create menu allows you to easily create new bugs from anywhere in the portal. Simply click the Quick Create menu on the upper right of any portal page to access the menu. Clicking on the Report Bug option in the quick create dropdown list will open the record view layout which allows you to enter in all the relevant

information for the bug.

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

1. Open the Quick Create menu on the upper right of any portal page and select "Report Bug".
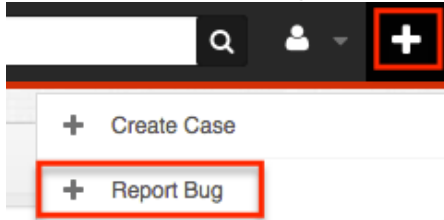
2. Enter appropriate values for the [fields](#) in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
   - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create another record.
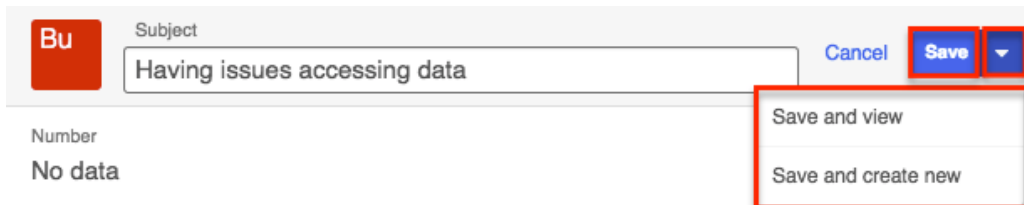
Viewing Bugs

There are various options available for viewing bugs in the portal including via Bugs list view, Bugs record view, Bugs Recently Viewed menu, and Bugs dashlet.

Viewing Bugs Via List View

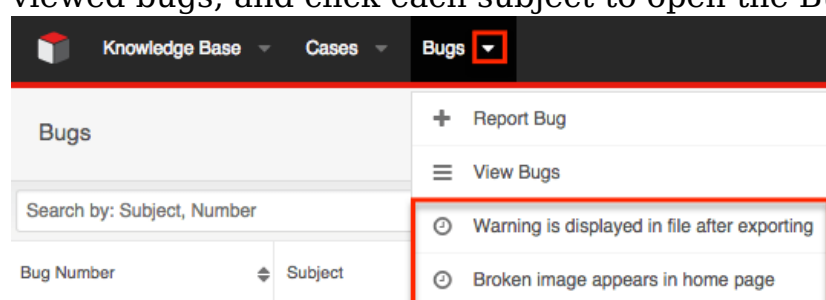The Bugs list view displays all bugs meeting the current search criteria. To access the list view, simply click the Bugs module tab. While list view shows basic key details of the bug, you can click the bug's subject to open the record view for more details. For more information on viewing bugs via list view, please refer to the [Bugs List View](#) section of this documentation.

Viewing Bugs Via Record View

The Bugs record view displays thorough bug information including all relevant bug fields followed by notes submitted by the vendor's representatives, as well as portal users from other companies inquiring about the same bug. The record 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 the record view, please refer to the Bugs Record View section of this documentation.

Viewing Bugs Via Recently Viewed

As you utilize the portal, it will keep track of which bugs you have recently viewed. Click the Actions menu in the Bugs module tab to see a list of your most recently viewed bugs, and click each subject to open the Bugs record view.

Viewing Bugs Via Dashlet

The Bugs dashlet displays all bug reports meeting the current search criteria. To access the dashlet, simply navigate to the portal's Home page. While the dashlet displays basic key details of the bug, you can click the bug's subject to open the record view for more details. For more information on viewing bugs via the dashlet, please refer to the Home section of this documentation.
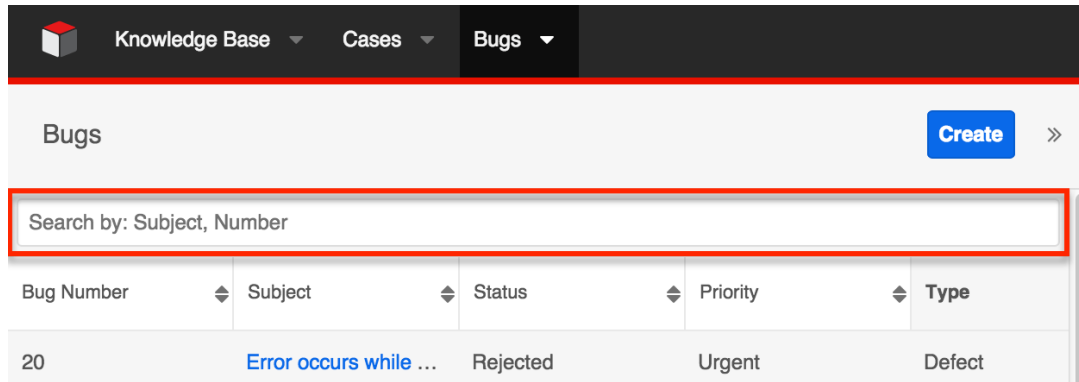
Searching Bugs

The Bugs list view includes a module search 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 Bugs dashlet also includes a search bar to help locate bugs. Global Search allows you to search for information across the 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. %error). This will pull up any record that has the word "error" in the name, regardless of how it starts or ends.

Note: Only the bug's subject and number can be used to search for bugs in the portal.
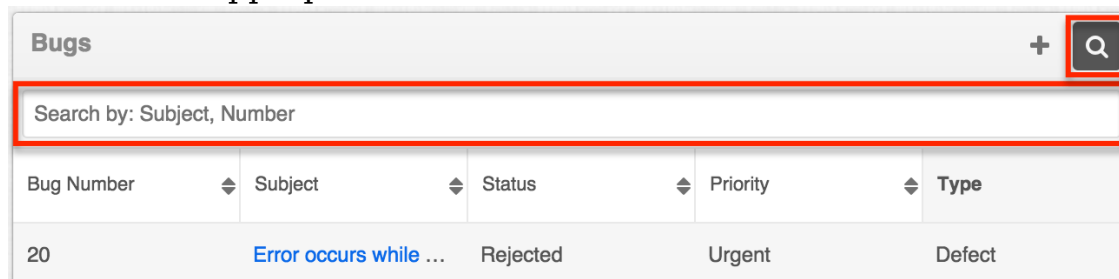
Searching Bugs Via Module

Module search enables users to easily search by bug subject or number within the Bugs module and pull up matching records in the list view. Simply enter a keyword into the search box and relevant results will begin appearing once you enter in at least one character.


Searching Bugs Via Dashlet

Bugs can be searched via the Bugs dashlet on the Home page by utilizing the search bar below the dashlet header. You can perform a search in the dashlet based on the bug subject or number. There is a Magnifying Glass icon on the upper right of the dashlet which allows you to toggle viewing the search bar or closing it on the dashlet. The relevant results will display in the list view below once you enter in the appropriate search term.

Searching Bugs Via Global Search

Global Search allows you to search for information across the entire 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 and you can enter in the
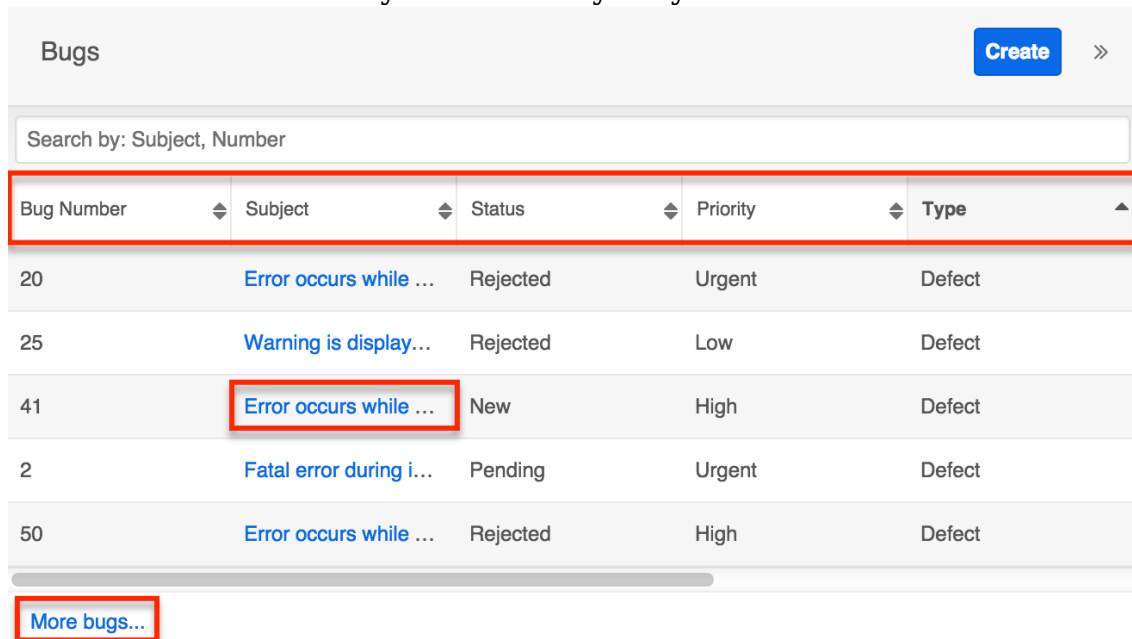
appropriate keyword to perform a search. After the search is complete, the relevant results will display and you can click the bug subject to open it in [record view](). For more information regarding Global Search, please refer to the [Global Search]() section of this documentation.
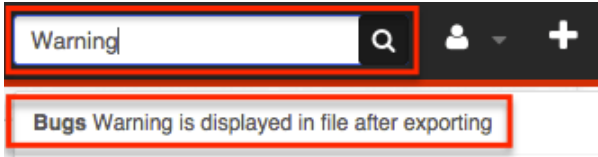
Bugs List View

The Bugs list view displays all bugs meeting the current search criteria. You can view the basic details of each bug within the field columns and click on a bug's subject to open the [record 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.

Note: The list view may be sorted by only one column at a time.

The list view loads an initial number of records meeting the current search criteria with the option to show additional results upon request. By default, the portal displays 20 records per list view results set, but the vendor can change the number of records to display in the list view. To load the next set of list view results, simply click the More Bugs link at the bottom of the dashlet.

Bugs Record View

The Bugs record view displays thorough bug report information including all relevant fields. The record view can be reached by clicking a bug's link from anywhere in the portal including from the Bugs list view. On the upper right of the record view, there are two buttons that allow you to page through each bug in the Bugs list view's current search results. Clicking the Left arrow button displays the previous bug of the current search results while clicking the Right arrow button displays the next bug of the current search results. In addition, clicking the double arrow icon to the right of the Left and Right arrow button will expand the record view to the full screen width. The preview pane to the right of the record view will be hidden when the record view is expanded. To reduce the record view's width and reveal the preview pane, simply click the double arrow icon again.

You can also view any notes attached to the bug, which will appear beneath the bug fields. Clicking the note's subject or Preview icon will display relevant details of the note in the preview pane to the right of the record view. In addition, if there are any files attached to the note, you can download it by clicking the file name. On the upper right of the preview pane, there is a Left and Right arrow button that allows you to scroll through the notes attached to the bug. To close the preview, simply click the "X" on the upper right of the preview pane. To add a new note, simply click the Add a Note button to the far right of the Notes header.

Adding Notes to Bugs

Notes in the portal can be used as a method of communication regarding the bug. Using the portal, you can add notes to the bug report with any additional information you have about the bug or any questions you have for your vendor. When the note is added, it will appear in the Notes panel of the bug's record view and your vendor's support department will be able to view the note attached to the bug as well. Please note that these notes will be visible by all portal users with access to the vendor's portal and not just to portal users in your organization. **Note**: There is a 30-second timeout limit for all uploads.
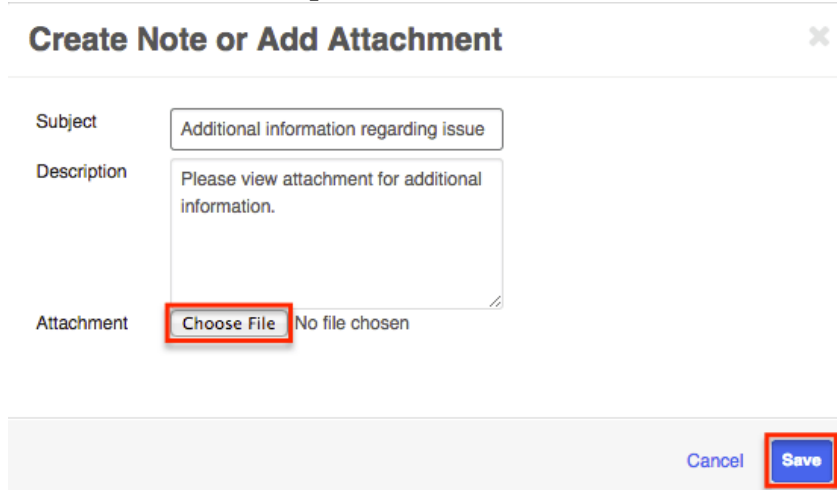
Use the following steps to add a note to the bug:

1. Navigate to the bug's record view.
2. Click the "Add a Note" button below the bug fields.

3. In the pop-up window, enter the appropriate information you wish to communicate to the vendor. Once all fields are complete, click "Save".
    ○ **Note**: If you wish to attach a file to the bug, click the "Choose File" button to open a file selection window from your browser.

Cases

The Cases section of the portal allows you to submit support related issues that you run into so that the vendor can work on rectifying them for you. You can also view historical cases submitted to the vendor and perform actions such as tracking the status of the case and attaching notes to the case.

Note: Cases can only be viewed by portal users associated with your company. Portal users outside of your company will not be able to view your cases.

Cases Fields

The Cases module contains a number of stock fields from the vendor's case management database that will be used to enter all relevant information when creating the case. Below is a list of available fields that can be displayed in the portal. Please note that depending on what fields the vendor decides to display in the portal, not all of the fields may be available.

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
Source	
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 case

Creating Cases

There are various methods for creating cases in the portal including via the Cases

module, Cases dashlet, and [quick create](#). The same record view layout opens when creating the case via these various methods and includes all of the relevant fields you need to report the issue to your vendor. Please note that the created case will only be viewable by portal users associated with your organization.

Note: Once the case has been created, you do not have the option to edit the record view via the portal. Any necessary change can be made by a representative from your vendor.

Creating Cases Via Module

One of the most common methods of case creation is via the Cases module using the Create Case option in the module tab or the Create button on the list view. This opens up the record view layout which allows you to enter all of the relevant information for the case.

Use the following steps to submit a case via the Cases module:

1. Click the triangle in the Cases module tab to open the Actions menu and select "Create Case". You can also click the Create button on the upper right of the Cases list view.
   From Cases module tab:
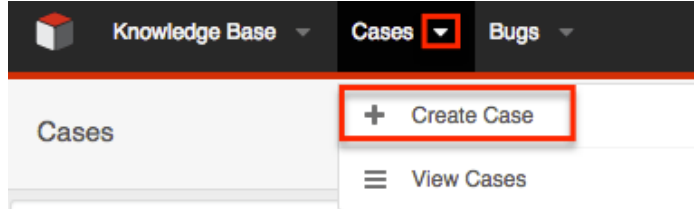
   From Cases list view:

2. Enter appropriate values for the [fields](#) in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
   - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the case's details after the save is complete. "Save and create new" saves the current case record and opens a new, blank record view in edit mode where you can create another case.
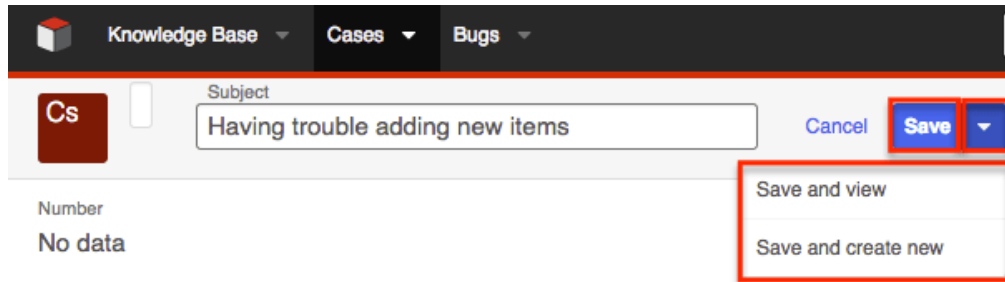
Creating Cases Via Dashlets

A case can also be created via the Cases dashlet on the Home page. This opens the record view layout which allows you to enter all of the relevant information for the case.
Use the following steps to submit a case via the Cases dashlet:

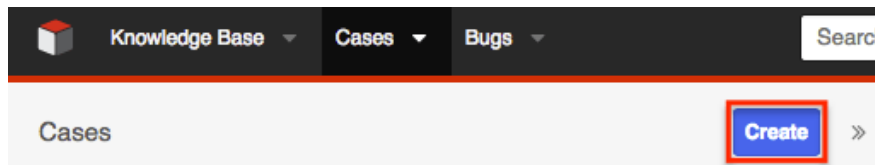1. Navigate to the portal's Home page.
2. Click on the Plus button on the upper right of the Cases dashlet.
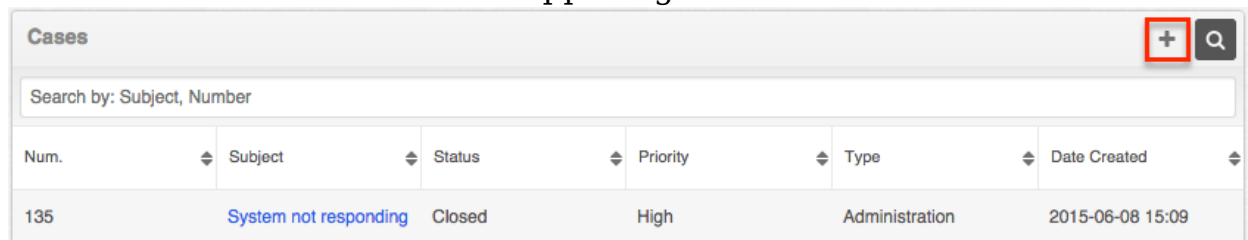
3. Enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
4. Once the necessary information is entered, click "Save".
   - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create
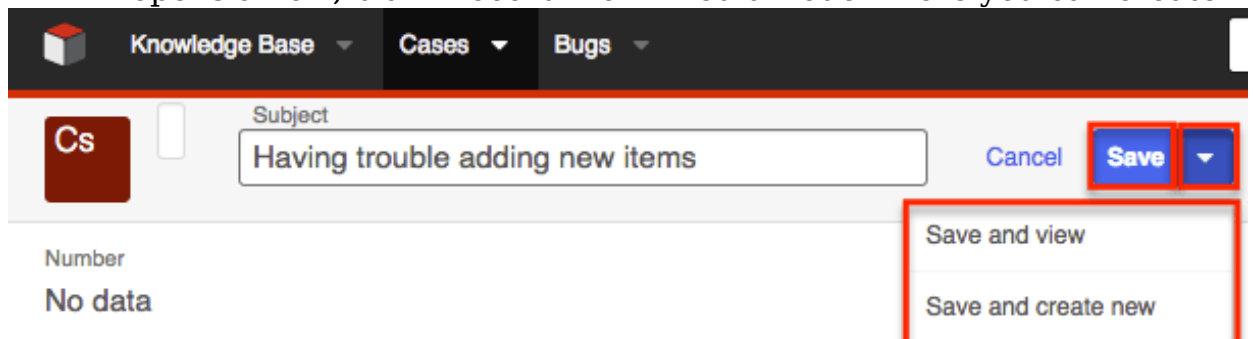
Creating Cases Via Quick Create

The Quick Create menu allows you to easily create new cases from anywhere in the portal. Simply click the Quick Create menu on the upper right of any portal page to access the menu. Selecting the Create Case option in the Quick Create menu will open the record view layout which allows you to enter in all the relevant information for the case.

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

1. Open the Quick Create menu on the upper right of any portal page and select "Create Case".
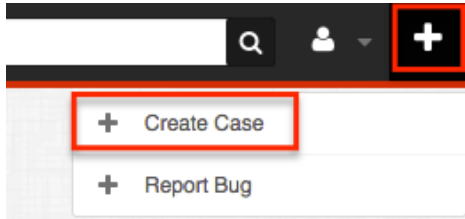
2. Enter appropriate values for the [fields](#) in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".
   - Alternatively, you can use the Actions Menu to the right of the Save button to select "Save and view" or "Save and create new". "Save and view" will display the record's details after the save is complete. "Save and create new" saves the current record and opens a new, blank record view in edit mode where you can create
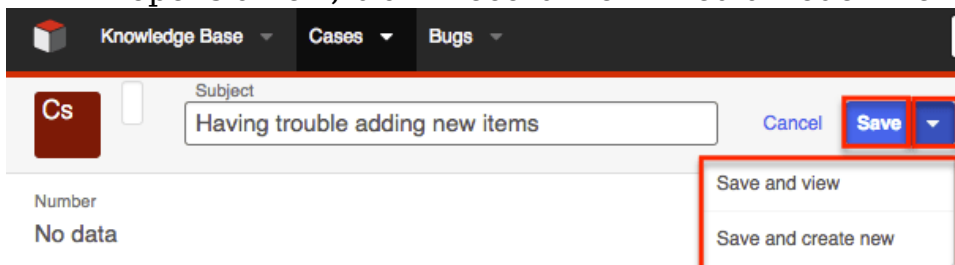

Viewing Cases

There are various options available for viewing cases in the portal including via Cases list view, Cases record view, Cases Recently Viewed menu, and Cases dashlet.

Viewing Cases Via List View

The Cases list view displays all cases meeting the current search criteria. To
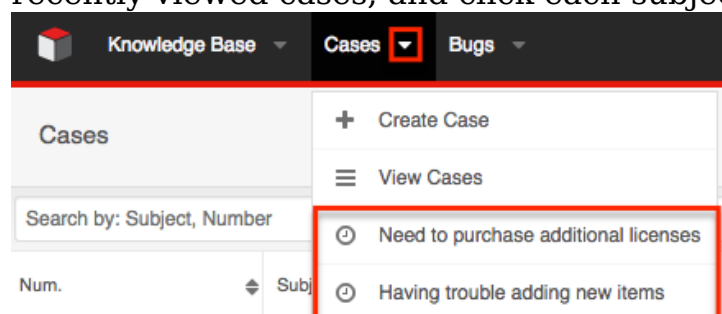
access the list view, simply click the Cases module tab. While list view shows basic key details of the case, you can click the cases's subject to open the record view for more details. For more information on viewing cases via list view, please refer to the [Cases List View](#) section of this documentation.

Viewing Cases Via Record View

The Cases record view displays thorough case information including all relevant case fields followed by notes submitted by the vendor's support representatives, as well as other portal users from your organization working on the same case. The record 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 the record view, please refer to the [Cases Record View](#) section of this documentation.

Viewing Cases Via Recently Viewed

As you utilize the portal, it will keep track of which cases you have recently viewed. Click the Actions menu in the Cases module tab to see a list of your most recently viewed cases, and click each subject to open the Cases record view.

Viewing Cases Via Dashlet

The Cases dashlet displays all cases meeting the current search criteria. To access the dashlet, simply navigate to the portal's [Home page](#). While the dashlet displays basic key details of the case, you can click the case's subject to open the record view for more details. For more information on viewing cases via the dashlet, please refer to the [Home](#) section of this documentation.
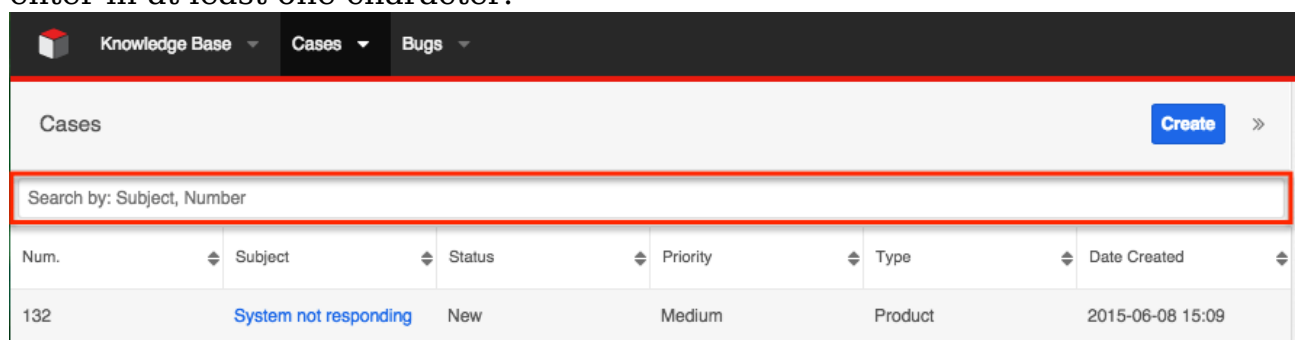
Searching Cases

The Cases list view includes a module search 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 Cases dashlet also includes a search bar to help locate cases. Global Search allows you to search for information across the 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. %error). This will pull up any record that has the word "error" in the name, regardless of how it starts or ends.

Note: Only the case's subject and number can be used to search for cases in the portal.

Searching Cases Via Module
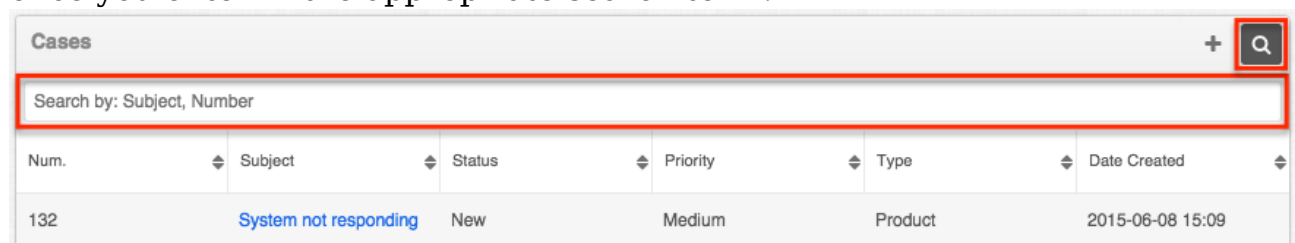
Module search enables users to easily search by case subject or number within the Cases module and pull up matching records in the list view. Simply enter a keyword into the search box and relevant results will begin appearing once you enter in at least one character.

Searching Cases Via Dashlet

Cases can be searched via the Cases dashlet on the [Home page](#) by utilizing the search bar below the dashlet header. You can perform a search in the dashlet based on the case subject or number. There is a Magnifying Glass icon on the upper right of the dashlet which allows you to toggle viewing the search bar or closing it on the dashlet. The relevant results will display in the list view below once you enter in the appropriate search term.

Searching Cases Via Global Search

Global Search allows you to search for information across the entire 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 and you can enter in the appropriate keyword to perform a search. After the search is complete, the relevant results will display and you can click the case subject to open it in record view. For more information regarding Global Search, please refer to the Global Search section of this documentation.
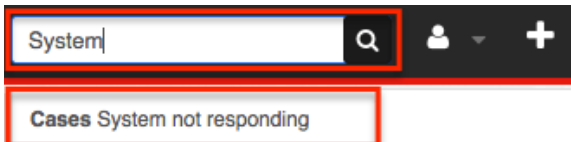
Cases List View

The Cases list view displays all cases meeting the current search criteria. You can view the basic details of each case within the field columns and click on a case's subject to open the record 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.

Note: The list view may be sorted by only one column at a time.

The list view loads an initial number of records meeting the current search criteria with the option to show additional results upon request. By default, the portal

displays 20 records per list view results set, but the vendor can change the number of records to display in the list view. To load the next set of list view results, simply click the More Cases link at the bottom of the dashlet.

Cases Record View

The Cases record view displays thorough case information including all relevant fields. The record view can be reached by clicking a case's link from anywhere in the portal including from the Cases list view. On the upper right of the record view, there are two buttons that allow you to page through each case in the Cases list view's current search results. Clicking the Left arrow button displays the previous case of the current search results while clicking the Right arrow button displays the next case of the current search results. In addition, clicking the double arrow icon to the right of the Left and Right arrow button will expand the record view to the full screen width. The preview pane to the right of the record view will be hidden when the record view is expanded. To reduce the record view's width and reveal the preview pane, simply click the double arrow icon again.

You can also view any notes attached to the case, which will appear beneath the case fields. Clicking the note's subject or Preview icon will display relevant details of the note in the preview pane to the right of the record view. In addition, if there are any files attached to the note, you can download it by clicking the file name. On the upper right of the preview pane, there is a Left and Right arrow button that allows you to scroll through the notes attached to the case. To close the preview, simply click the "X" on the upper right of the preview pane. To add a new note, simply click the Add a Note button to the far right of the Notes header.

Adding Notes to Cases

Notes in the portal can be used as a method of communication regarding the case. Using the portal, you can add notes to the case with any additional information you wish to provide to the vendor or any questions you have regarding the case. When the note is added, it will appear in the Notes panel of the case's record view and your vendor's support department will be able to view the note attached to the case as well. These notes will only be visible to other portal users in your organization.
Note: There is a 30-second timeout limit for all uploads.

Use the following steps to add a note to the case:

1. Navigate to the case's record view.
2. Click the "Add a Note" button below the case fields.

3. In the pop-up window, enter the appropriate information you wish to communicate to the vendor. Once all fields are complete, click "Save".
   Note: If you wish to attach a file to the case, click the "Choose File" button

to open a file selection window from your browser.

Knowledge Base

The Knowledge Base module in the portal allows you to review any articles published by the vendor and can cover a variety of topics such as case resolutions, common troubleshooting tips, frequently asked questions, etc. The Knowledge Base is a useful resource and should be reviewed before filing a [case](#) or a [bug](#) to see if there is a published article with answers to your question or issue.

Knowledge Base Fields

The Knowledge Base module contains a number of stock fields from the vendor's Knowledge Base. Below is a list of fields that can be displayed in the portal. Please note that depending on what fields the vendor decides to display in the portal, not all of the fields may be available.

Field	Description
Approver Name	The vendor's representative who approved the article
Assigned to	The vendor's representative assigned to the article
Attachments	Any files attached to the article
Author	The vendor's representative who wrote and owns the article

Body	The content of the article
Date Created	The date the article was created
Date Modified	The date the article was last modified
Description	A description or other information about the article
Document Name	The name of the article
Expiration Date	The date the article information expires and is no longer available in the portal
KBDocument Revision Number	The article's current revision number
Publish Date	The date the article was published
Status	The current status of the article
Tags	The topics or categories that are related to the article
Title	The title or designation of the article

Viewing Knowledge Base Articles

There are various options available for viewing knowledge base articles in the portal including via Knowledge Base list view, Knowledge Base record view, Knowledge Base Recently Viewed menu, and Knowledge Base dashlet.
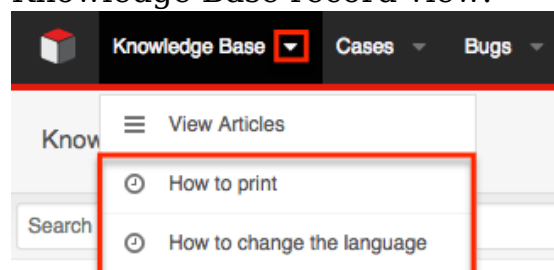
Viewing Articles Via List View

The Knowledge Base list view displays all articles meeting the current search criteria. To access the list view, simply click the Knowledge Base module tab. While list view shows basic key details of the knowledge base article, you can click the article's name to open the record view for more details. For more information on viewing articles via list view, please refer to the Knowledge Base List View section of this documentation.

Viewing Articles Via Record View

The Knowledge Base record view displays thorough information regarding the article published by the vendor. The record 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 articles via the record view, please refer to the Knowledge Base Record View section of this documentation.

Viewing Articles Via Recently Viewed

As you utilize the portal, it will keep track of which articles you have recently viewed. Click the Actions menu in the Knowledge Base module tab to see a list of your most recently viewed articles, and click each document name to open the Knowledge Base record view.

Viewing Articles Via Dashlet

The Knowledge Base dashlet displays all articles meeting the current search criteria. To access the dashlet, simply navigate to the portal's Home page. While the dashlet displays basic key details of the article, you can click the article's name to open the record view for more details. For more information on viewing articles via the dashlet, please refer to the [Home](#) section of this documentation.
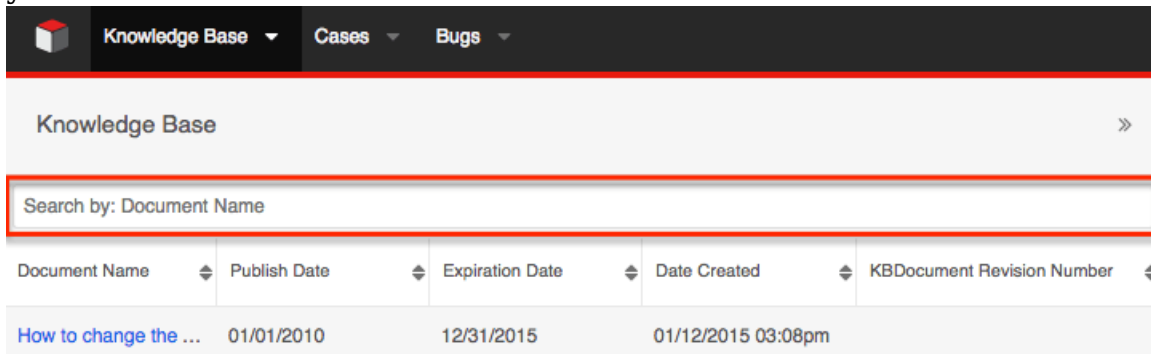
Searching Knowledge Base Articles

The Knowledge Base list view includes a module search 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 Knowledge Base dashlet also includes a search bar to help locate articles. Global Search allows you to search for information across the 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. %troubleshooting). This will pull up any record that has the word "troubleshooting" in the name, regardless of how it starts or ends.

Note: Only the document's name can be used to search for articles in the portal. Search will not return results based on the body of the Knowledge Base article or any other fields.
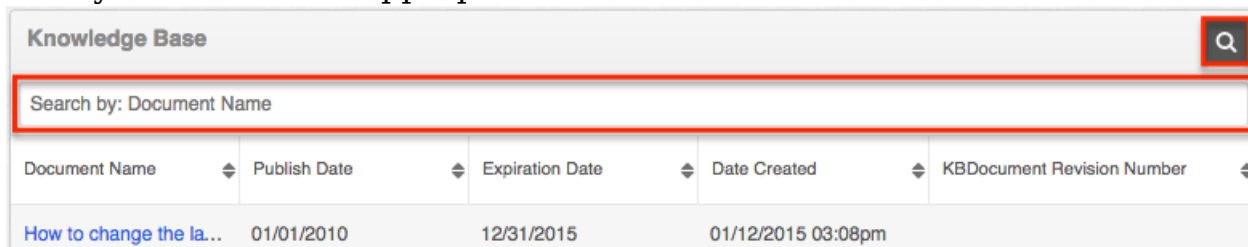
Searching Articles Via Module

Module search enables users to easily search by document name within the Knowledge Base module and pull up matching records in the list view. Simply enter a keyword into the search box and relevant results will begin appearing once you enter in at least one character.

Searching Articles Via Dashlet

Articles can be searched via the Knowledge Base dashlet on the Home page by utilizing the search bar below the dashlet header. You can perform a search in the dashlet based on the document name. There is a Magnifying Glass icon on the upper right of the dashlet which allows you to toggle viewing the search bar or closing it on the dashlet. The relevant results will display in the list view below once you enter in the appropriate search term.
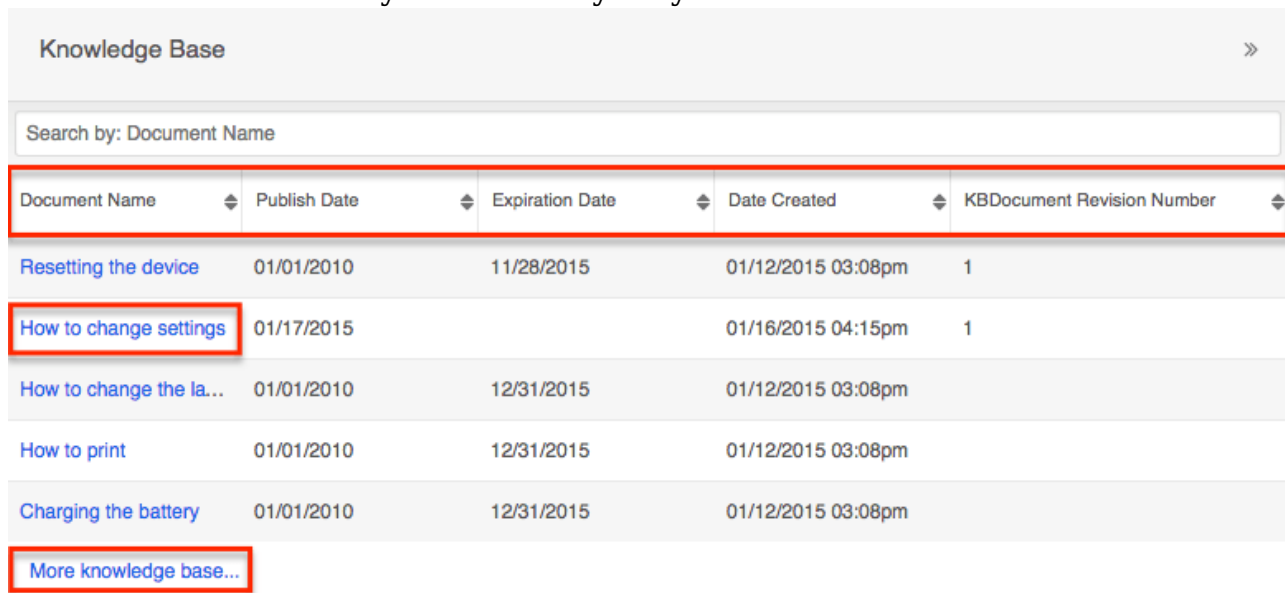

Searching Articles Via Global Search

Global Search allows you to search for information across the entire 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 and you can enter in the appropriate keyword to perform a search. After the search is complete, the relevant results will display and you can click the article name to open it in record view. For more information regarding Global Search, please refer to the Global Search section of this documentation.

Knowledge Base List View

The Knowledge Base list view displays all articles meeting the current search criteria. You can view the basic details of each article within the field columns and click on an article's name to open the record 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.

Note: The list view may be sorted by only one column at a time.

Knowledge Base					»
Search by: Document Name					
Document Name ⬍	Publish Date ⬍	Expiration Date ⬍	Date Created ⬍	KBDocument Revision Number ⬍	
Resetting the device	01/01/2010	11/28/2015	01/12/2015 03:08pm	1	
How to change settings	01/17/2015		01/16/2015 04:15pm	1	
How to change the la...	01/01/2010	12/31/2015	01/12/2015 03:08pm		
How to print	01/01/2010	12/31/2015	01/12/2015 03:08pm		
Charging the battery	01/01/2010	12/31/2015	01/12/2015 03:08pm		
More knowledge base...					

The list view loads an initial number of records meeting the current search criteria with the option to show additional results upon request. By default, the portal displays 20 records per list view results set, but the vendor can change the number of records to display in the list view. To load the next set of list view results, simply click the More Knowledge Base link at the bottom of the dashlet.

By default, the Knowledge Base Categories & Published Articles dashlet is displayed in the intelligence pane to the right of the list view. This dashlet shows all available categories and subcategories (e.g. Documentation, Database, etc.) as well as any published articles attached to the categories. You can click a category name to expand it and an article name to open the article in record view. If you wish to expand the list view's width and close the intelligence pane, simply click the double arrow icon.

Knowledge Base Record View

The Knowledge Base record view displays thorough information regarding a published article. The record view can be reached by clicking an article's link from anywhere in the portal including from the [Knowledge Base list view](#). You can view and download any files attached to the article by clicking the file pill (e.g. Instruction_Chrome.docx) in the Attachments field. To download the attachment as a .zip file to your local machine, simply click the Download link to the right of the field. Please note that if the article has more than one attachment, the Download All link will display instead allowing users to download all attachments as a .zip file at once.

While viewing the knowledge base article, you also have the option to rate the article's usefulness by clicking the "Not Useful" or "Useful" buttons. This information will be captured in the vendor's system which will help communicate your thoughts and any areas of potential improvement.

On the upper right of the record view, there are two buttons that allow you to page through each article in the Knowledge Base list view's current search results. Clicking the Left arrow button displays the previous article of the current search results while clicking the Right arrow button displays the next. In addition, clicking the double arrow icon to the right of the Left and Right arrow button will expand the record view to the full screen width. The intelligence pane to the right of the record view will be hidden when the record view is expanded. To reduce the record view's width and reveal the intelligence pane, simply click the double arrow icon again. By default, the Knowledge Base Categories & Published Articles dashlet displays in the intelligence pane and displays the category (e.g. Documentation) that the current article belongs to in addition to related articles.

Beneath the knowledge base fields, you can also view any notes attached to the knowledge base article. Clicking the note's subject or Preview icon will display relevant details of the note in the Preview pane to the right of the record view. On the upper right of the Preview pane, there is a Left and Right arrow button that allows you to scroll through the notes attached to the case. To close the preview, simply click the "X" on the upper right of the preview pane. To add a new note, simply click the Add a Note button to the far right of the Notes header.

Adding Notes to Knowledge Base Articles

Notes in the portal can be used to communicate with the vender regarding the knowledge base article. Using the portal, you can add notes to the knowledge base article to provide any comment as well as ask questions regarding the article. Once the note is added, it will appear in the Notes panel of the knowledge base article's record view. Please note that these notes will be visible by all portal users with access to the vendor's portal and not just to portal users in your organization.

Use the following steps to add a note to a knowledge base article:

1. Navigate to the knowledge base article's record view.
2. Click the "Add a Note" button below the knowledge base fields.

3. In the pop-up window, enter the information you wish to communicate to the vendor. Once all fields are complete, click "Save".
   - **Note**: If you wish to attach a file to the article, click the "Choose File" button to open a file selection window from your browser.

User Profile

The User Profile section of the portal displays information such as your name, email address, primary address, etc. that the vendor has on file in their system. If any of your contact information changes, please update your information accordingly so that the vender has up-to-date data. Please note that any changes made in your user profile will automatically be updated in the vendor's database as well.

User Fields

The User Profile contains a number of stock fields from the vendor's database.

Below is a list of fields that can be displayed in the portal. Please note that depending on what fields the vendor decides to display in the portal, not all of the fields may be available.

| Field	Description
Alternate Address	Your alternate address (e.g. billing or shipping)
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 your contact information was entered in the 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 Plus 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 Phone	Your alternate phone number
Portal Name	Your username 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 by clicking the user profile image on the upper right of the portal then selecting "Profile". Once you are in the record view, you can edit individual fields without entering the full edit mode by clicking the field name (e.g. Email). Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. If you wish to edit multiple fields at once via the record view, click the Edit button on the upper right of the page. Once the necessary fields have been updated, click "Save" to preserve the changes made.

Use the following steps to edit your user profile:

1. Click the user profile image and select "Profile".
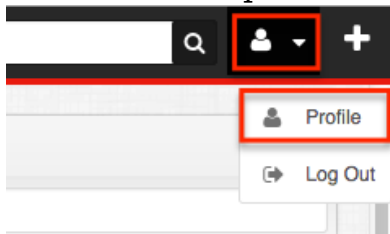
2. Enter appropriate values for the fields you wish to update.
   - **Note**: To update your portal password, enter your current password, new password, and confirmed password.
3. Once the necessary information is entered, click "Save".

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