User guide for

ServiceLogic

Version 3.06
September 2004

calder
transcending complexity

Contents

Introduction

About ServiceLogic

ServiceLogic provides a set of tools for financial planners to manage the services they deliver to their clients. Each organization may have its own customized portal (called a service site) that provides a collaborative environment for your employees and clients. In ServiceLogic, you'll find the necessary capabilities for document management, project management, workflow, and contact management to support a high-quality, repeatable service delivery process.

ServiceLogic is a hosted service, which means your data is securely stored and backed up on Calder Systems' servers. You don't need to install or manage any software except your Internet browser (Microsoft Internet Explorer).

Since ServiceLogic is web-based, you work with ServiceLogic in your browser like any other web site. To start ServiceLogic, use your browser to go to:

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http://www.calderclient.com
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Portfolio management and entities

ServiceLogic is organized around the concept of Entities (see *Entities and projects*). Within your service site, you can create and organize portfolios of entities to represent existing business structures (for example, your client's financial affairs, or the structure of your organization).

Document management

ServiceLogic provides document management features for securely storing, organizing, and retrieving your electronic documents. When you upload a document to ServiceLogic, you associate it with one of the entities in your service site. This relationship means that your documents are organized the same way you have organized your entities.

Documents can be shared with other participants according to permissions you grant, or downloaded to your computer for updating and editing.

When you upload a new version of the document, ServiceLogic maintains all previous versions of the documents, and you can retrieve past versions at any time.

Task scheduling

Within each ServiceLogic entity, you can create tasks, assign them to individual users, and track the task status. A user's assigned tasks are displayed on his or her calendar page, so users can check their assigned tasks at any time. All tasks are displayed on the Tasks page, so managers can review and track tasks for an entity or the entire service site.

User permissions

ServiceLogic users cannot access or view an entity unless they are assigned as a participant to the entity. If a user is not a participant to an entity, the user cannot retrieve any information associated with the entity including documents, tasks, schedules, or any other information. By adding users only to the entities you want them to see, you can control each user's view of your organization and access to information.

Template system

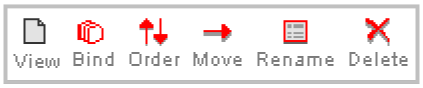
Entities are based on templates that define which tasks, documents, and roles the entity should contain.

New Features in Version 3.06

Folders and binders

You can now delete folders and binders, rename them, and move them to different entities (see *Documents*).

These icons on the Documents page provide commands for documents, folders, and binders:



Binder re-ordering

You can change the order of documents within a binder (see *Reorder documents within a binder*).

Required folders

Some types of entities may require certain folders to always be available Therefore, ServiceLogic provides the ability to create folders within each entity template. All entities template will contain the required folders for their template.

- Required folders cannot be deleted by users regardless of permission level.
- Required folders can only be deleted by removing them from the template. If an Author deletes folder from the template, the folder will be removed from all entities based on the template provided the folder is empty. If a folder contains documents, it is not deleted when the folder is deleted from the template.

Authors may create required folders in the Authoring system. For more information, see the Authoring Guide.

Archive email

You may add an 'archive email address' to your service site configuration. All emails sent by ServiceLogic are copied (BCC) to your archive email address. You may store these emails in a location of your choice to meet your security and regulatory requirements.

No archive address is configured for your site unless you request it. The archive email address can be configured by your Calder representative when your site is initially created. To change the archive address at any time, contact Calder Support at support@caldersystems.com.

For more information see *Archive email address*.

Example scenario

In this example, we are using ServiceLogic to manage activities of a fictional company - a network of financial advisors called Prime Financial Associates (PFA).

PFA's organization is represented by a hierarchical tree of entities. PFA has created a structure of entities so that each entity contains a major category of information. The top level is 'Prime Financial Associates,' which contains three sub-entities:

- **Clients**. Contains entities representing clients being advised by PFA advisors.
- **Corporate**. Contains entities representing PFA's internal corporate activities.
- **Legal**. Contains entities managed by PFA's Legal department.

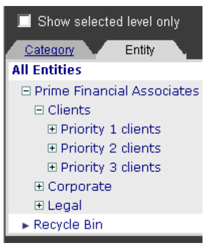


Figure 1. PFA represented by a collection of entities

This structure provides several important features required by PFA:

- PFA can allow clients to log in to ServiceLogic from the Internet to view their own information. The client sees only the entities he or she is authorized to see ('participates in'), and cannot see any other client's information or any other PFA information.
- PFA can allow an individual advisor to have access and work with only certain clients (entities).

An expanded view of the PFA entities is below. Notice that all the clients are organized under the Clients entity, which itself contains three other entities: Priority 1 clients, Priority 2 clients, and Priority 3 clients.

While this organization has chosen to create entities that correspond to individual clients, note that you can use ServiceLogic entities to model other types of organizations, too. For example, PFA could just as easily have decided to organize all their clients under an entity for each advisor. You can develop a different set of entities to represent your organization's unique structure.

Figure 2. Expanded view of PFA entities

What the client sees

Edward deClient is a member of the deClient family, which PFA has designated a 'Priority 3' client. The PFA advisor has decided to allow Edward to access some (but not all) of the deClient entities.

When Edward logs into ServiceLogic, he sees only entities he participates in (*Figure 3*, below). Note that the view does not display entities Edward does not participate in. Compare this view with the expanded view in *Figure 2*.

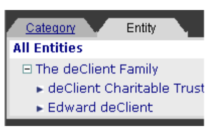


Figure 3. Single-client view of PFA entities

Adding the client to the appropriate entities

To restrict Edward's access, the advisor has added Edward as a participant only to the entities that Edward should see:

- 'The deClient family' entity. This is the top-level entity that serves to organize all the other deClient entities.
- The Edward deClient entity. This entity represents all the activities belonging personally to Edward.
- The 'deClient Charitable Trust,' on which Edward serves as a board member.

However, the advisor does not want Edward to see his brother William's information, so Edward is not added as a participant to the William deClient entity.

Hiding the 'Priority' categories

PFA does not wish Edward to see that the deClient family is listed as a Priority 3 client. In fact, PFA does not want any client to be reminded of the Priority categories at all.

To hide the Priority entities from clients, PFA makes sure never to add a client as a participant to a Priority entity. Since clients are not participants, they never see the Priority categories.

Showing sub-items

By selecting the Show sub-items checkbox, users can see tasks, documents, or participants from multiple entities.

For example: when Edward selects the deClient Family entity and opens the Tasks page, he doesn't see any tasks. That's because there aren't any tasks directly associated with the deClient Family entity. However, the entities under the deClient Family do have tasks associated with them (sub-items). To see the sub-items, Edward selects the Show sub-items checkbox.

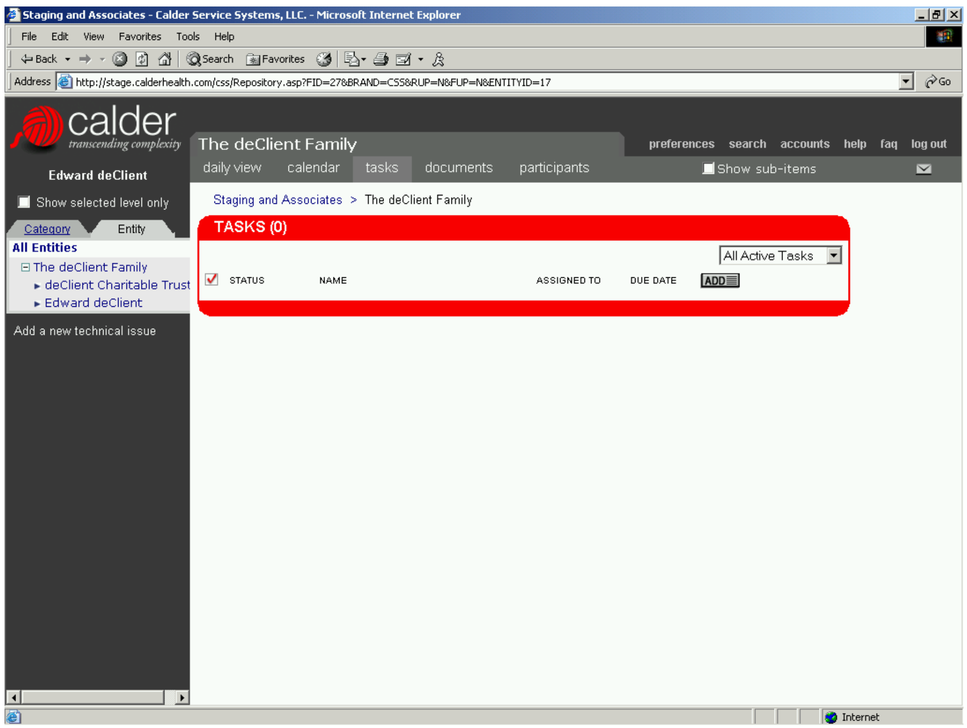


Figure 4. Top-level entity (without sub-items)

With the Show sub-items checkbox selected, Edward now sees three tasks. Two tasks are for the Edward deClient entity: "Doc: Advanced Care Directive" and "Doc: Birth Certificate" are tasks directing Edward to obtain those documents for his advisor. Another task is a reminder for Edward from the deClient Charitable Trust entity: "Attend wine and cheese reception."

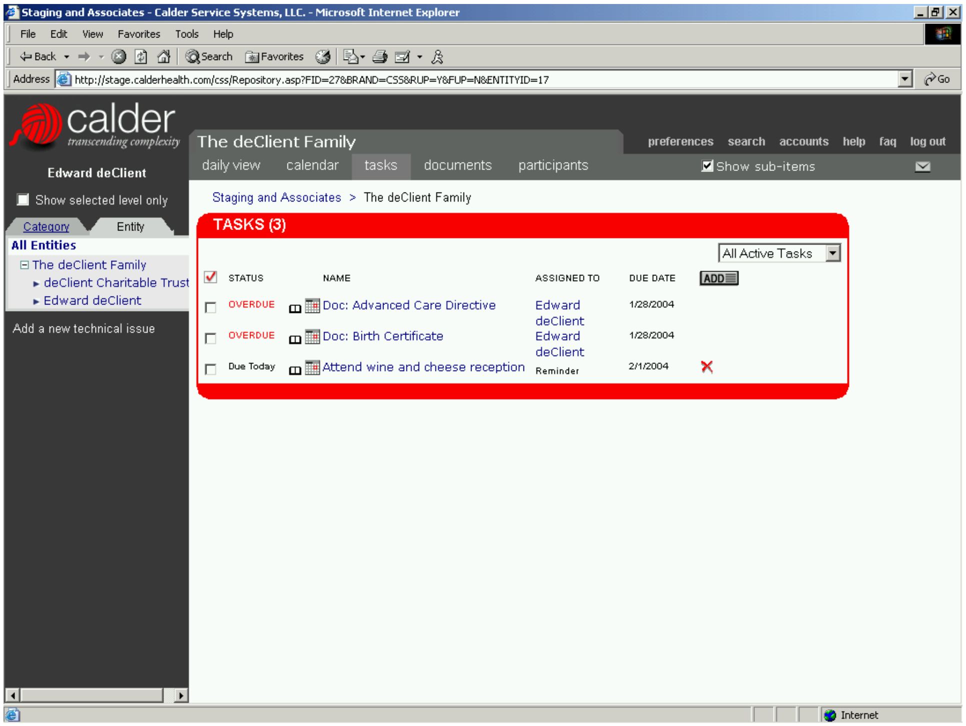


Figure 5. Top-level entity (with sub-items)

What the advisor sees

Mark MacAuthor is a financial advisor who works for PFA. Mark is assigned to advise two clients: the deClient family, and Client A.

Mark's view includes only his two clients. That is because PFA has included Mark as a participant in the entities for Mark's clients, but not any others.

Mark can see all the Priority entities, even though he can't see all the clients within each Priority level. Since Mark is an associate of PFA, he needs to see the structure of the client list, so PFA has included him as a participant in the Priority entities.

Mark can also see other PFA entities, including Human Resources and Cafeteria menus. However, he cannot see other entities such as Legal or Executive Steering Committee. That is because PFA did not include him as a participant in those entities he does not see.

Figure 6. Advisor view of PFA entities

In this case, the advisor has a permission level of Author. As an Author, he can create new entities, but only under the entities he has access to. If Mark were a regular user (without Author or Admin permission), he could still work within each entity - he could upload and download documents, create and assign tasks, and add participants to existing entities.

What the Admin sees

Mary Masters is a working partner at PFA. All the advisors report to her, and she has responsibility for all clients. Mary helped introduce ServiceLogic at PFA, and she assumed responsibility for designing the PFA entity structure, and determining who should participate in each level of entities. Mary has a permission level of A&A (Author and Admin). This permission level gives Mary a considerable amount of control over the PFA entities:

- Because Mary is an Admin, she can see all PFA entities, even if she is not included as a participant. As a partner at PFA, she is permitted to view any entity. She can also create new entities, or move them to a different level.
- Being an Admin also allows Mary to access the Administration page within ServiceLogic, which provides advanced administrative functions.
- Since Mary is also an Author, she has access to the Authoring page within ServiceLogic, where she can create and maintain entity templates.

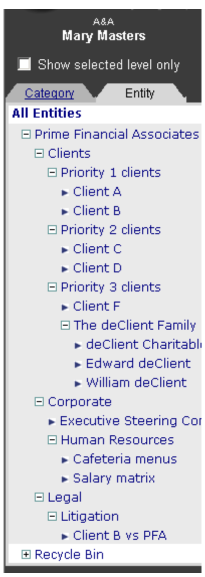


Figure 7. Admin view of PFA entities

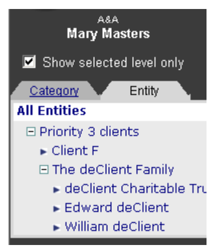


Figure 8. Admin view of PFA entities (show only selected)

Showing only the selected entity

Since an Admin can see all the entities, sometimes she wants to restrict her view so she can work with just one entity at a time. To do that, she uses the 'Show selected level only' checkbox.

In the view below, the Admin has selected the Priority 3 client entity, and then selected 'Show selected level only.' This hides all the other entities, except the entities under Priority 3.

Logging in

To open ServiceLogic, use Internet Explorer (Internet Explorer 6 Service Pack 1 or higher) to go to the ServiceLogic web site:

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http://www.calderclient.com
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Once you log in to this site, you can navigate via menus to any service site you are authorized to use (see Service sites and repositories).

Your ServiceLogic administrator is responsible for creating a user account for you, and adding you to one or more service sites. When you are added to a service site, you will receive two emails:

- An email notification containing the address (URL) of the site, and
- A second notification containing your password for that site.

All notifications and emails sent by ServiceLogic are sent to the email address for your user account (see ***Shared name and address information***).

Log in

1. Use Internet Explorer to go to http://www.calderclient.com.
2. Read the terms of service, then click Accept & Proceed to Login.
3. Log in with your ServiceLogic username and password.
   - If you have access to only one service site, the service site opens to your workspace.
   - If you have access to more than one service site, the Client Access Form opens with a list of links to your service sites. Click the service site you want to open.

Log out

To log out, click Logout on the top navigation bar. When Internet Explorer prompts you to close the window, click Yes. The browser closes and you are logged out.

- If you click No, the browser remains open and you are not logged out.

Figure 9. Close the browser window to log out of ServiceLogic

User permissions

All ServiceLogic users have access to a default set of functions, listed in *Table 1* (below). Users may be assigned additional permission levels (Author, Admin, or both) that provide access to additional functions.

Note that a user can have both Author and Admin permissions (A&A).

	Reader	**User**	**Author**	**Admin**
View entities you participate in	yes	yes	yes	yes
View all entities (even if you aren't a participant)	no	no	no	yes
Edit entities you participate in	no	no	no	yes
Edit entities (even if you aren't a participant)	no	no	no	yes
Change your own role (in Preferences)	no	yes	yes	yes
Create projects	no	no	yes	yes
Create or delete tasks	no	yes	yes	yes
Be assigned to a task	no	yes	yes	yes
Copy entities	no	no	no	yes
Move documents	no	no	no	yes
Create entities	no	no	yes	yes
Edit tasks not created by you	no	no	no	yes
Upload documents	no	yes	yes	yes
Download documents	yes	yes	yes	yes
Send email	yes	yes	yes	yes
Add new participant to an entity	no	no	no	yes
Access to Author site	no	no	yes	no
Access to Administration site	no	no	no	yes

Table 1. User permission levels

Your ServiceLogic administrator is responsible for assigning or changing your permission level. For example, your service site might assign permissions as follows.

- Reader (Clients, administrative assistants). Reader is the most basic permission level. Readers can view information for entities they participate in, but cannot edit or update information. Readers can view tasks and documents, but cannot be assigned to tasks, and cannot upload, move, or audit documents.
- User (Clients, administrative assistants). Users can view information in entities they participate in. This capability allows users to perform basic tasks to assist your financial advisers. Users can add or remove participants from an entity, upload and download documents, and add and assign tasks.
- Admin (Financial advisors). Admins can create and update entities, and can view all entities (even those they do not participants in). This capability allows Admins to review and manage all information across the service site, and to respond to customer needs by creating or altering structures for organizing information.

- Author (Senior financial advisors with responsibility for compliance or Quality Assurance). Authors have access to ServiceLogic's Authoring tools for creating and managing entity templates. Like Admins, Authors can also create and update entities, but only within entities they participate in. Authors do not have Admin permissions unless Admin permissions are explicitly assigned.

Your permission level is displayed on the navigation pane next to your user name:

User	*Author*	*Admin*	*A & A (Author and Admin)*

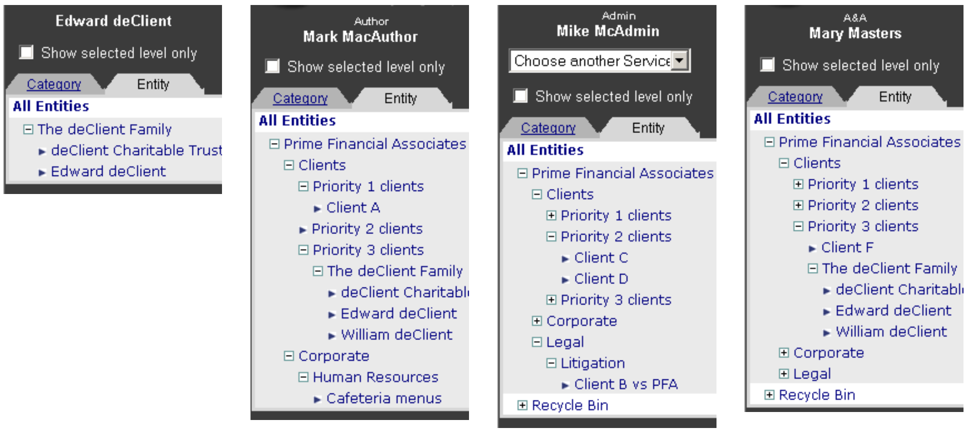

Figure 10. User permission displayed in navigation pane

Navigating in ServiceLogic

Your workspace

When you log in, ServiceLogic opens the workspace to display your daily view. The workspace is the central area that displays detailed information about the service site and its entities.

The navigation pane is an explorer-like view of all entities in the service site. Entities may contain other sub-entities, and you can expand and close the levels of entities by clicking the (+) or (-) icons.

- To display an entity in your workspace, click the entity in the navigation pane. The name of the selected entity is displayed in the tab above the workspace.
- To display other pages in your workspace, click the links in the top navigation bar (Daily View, Calendar, Tasks, Documents, Participants, and Email).

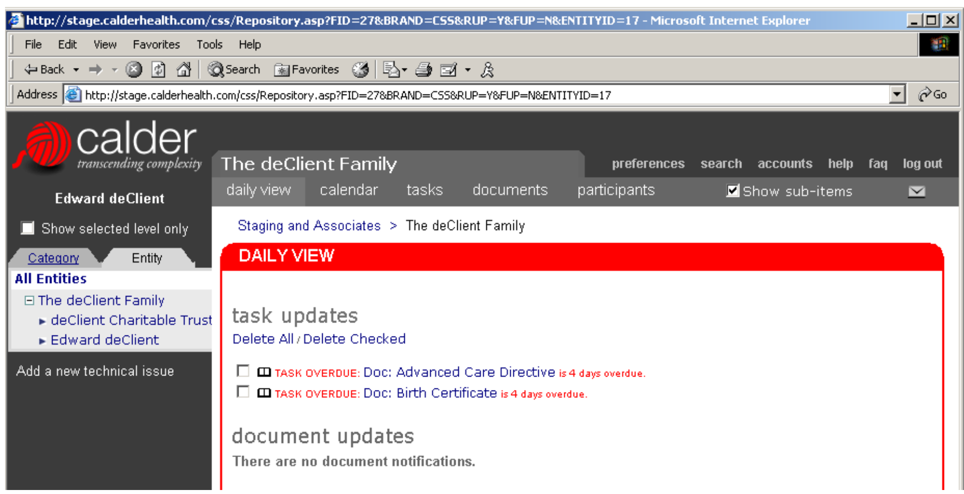

Figure 11. Workspace

Navigating entities

To display an entity in your workspace, click the entity in the left navigation pane. The name of the selected entity is displayed above the workspace. When an entity is selected, you can use the Top and Main navigation bars to open other pages to see more information about the selected entity.

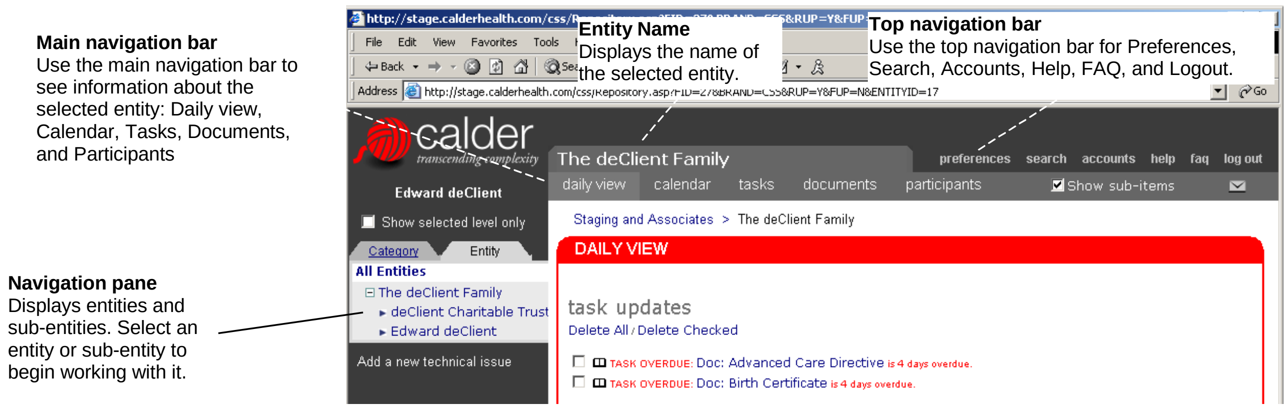

Figure 12. Navigating entities

Top navigation bar

In the top navigation bar click:

Preferences to open the Preferences page for setting your ServiceLogic user preferences.

Search to open the Search ServiceSite page.

Help to open a page of brief user instructions.

FAQ to open a Frequently Asked Questions document.

Accounts to open the Accounts page, where you can access your By All Accounts services.

Logout to close the browser and log out of ServiceLogic.

Main navigation bar

In the main navigation bar, click:

Daily view to return to your Daily View page.

Calendar to see a calendar view of tasks in the selected entity.

Tasks to see a list of all tasks in the selected entity.

Documents to see all documents included in the selected entity

Participants to see a list of participants for the entity (participants are ServiceLogic users who are authorized to access the entity).

Email (the envelope icon) to open the Email page (for composing and sending an email message).

Entities and categories

The left navigation bar contains two tabs: Entities and Category. Each tab presents a different view of all the entities in the service site.

- The Entity tab displays an explorer-type view of entities, listed alphabetically by entity name. Each entity is listed under its parent entity.
- The Category tab lists all categories assigned to entities in the service site. Click the category name to display all the entities in the category.

A Category is assigned to the entity when you create the entity (see Add a new entity).

Categories are based on customizable templates you can create and modify (see the *ServiceLogic Authoring Guide*).

All Entities/All Categories

Note that in each tab, the first item is All Categories and All Entities (see *Figure 13. Category view, entity view*).

When you open the Calendar, Tasks, Documents, or Participants pages (using the links on the main navigation bar), the workspace shows you information for the selected entity. But if you select All Categories or All Entities, the workspace shows information for all entities in the service site.

Figure 13. Category view, entity view

ServiceLogic pages

Daily view page

Your Daily View page is the first page you see after you log into your service site. To return to your Daily View page, click Daily View on the main navigation bar.

Your Daily View page displays notifications about your tasks or documents, including reminders about any pending tasks assigned to you. Click the notification to open the task or document..

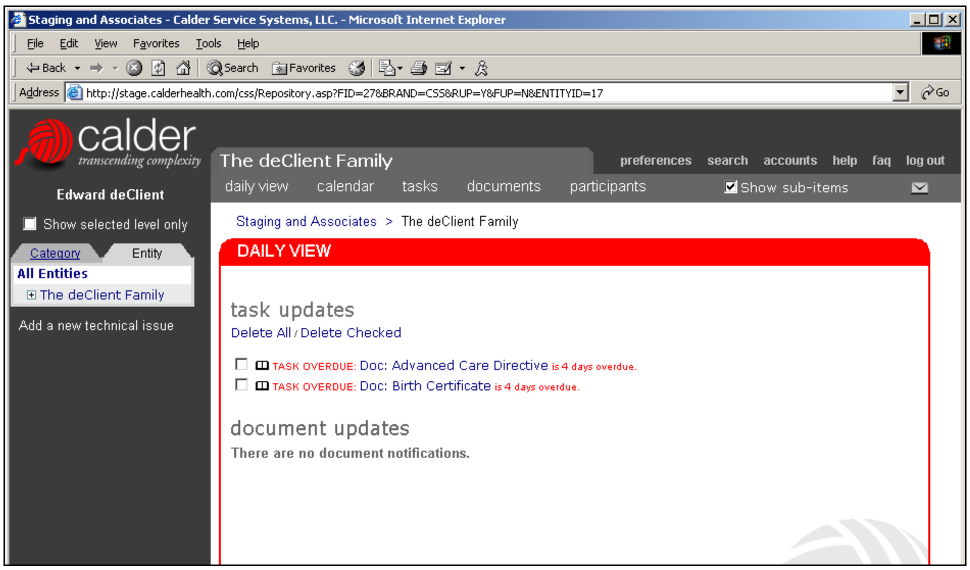

Figure 14. Daily View page

Calendar page

The Calendar page displays all tasks for the selected entity in a monthly calendar view. To open the Calendar page, click Calendar on the main navigation bar.

You can also display your tasks in a list view, instead of a monthly view. To switch between the list view and the monthly view, click the icon to the left of the Month list. You can set your Calendar page to open either the list view or the monthly view (see ***Preferences***).

Task status. Use the drop-down list to select which tasks you want to see on your calendar. The options are My Active Tasks, All Active Tasks, Completed Tasks, and Deleted Tasks.

Date range. In the list view, use the From and Two boxes to specify a date range for displaying tasks. Tasks due within your date range are listed on your calendar. For the monthly view, there is a single box for specifying the selected month.

Show sub-items. If the Show sub-items checkbox is not selected, the calendar shows tasks from only the current entity. If the checkbox is selected, the calendar shows tasks from the current entity, and also from any sub-entities contained within the current entity (provided you are a participant in the sub-entities). Tasks from sub-entities you do not participate in are not listed.

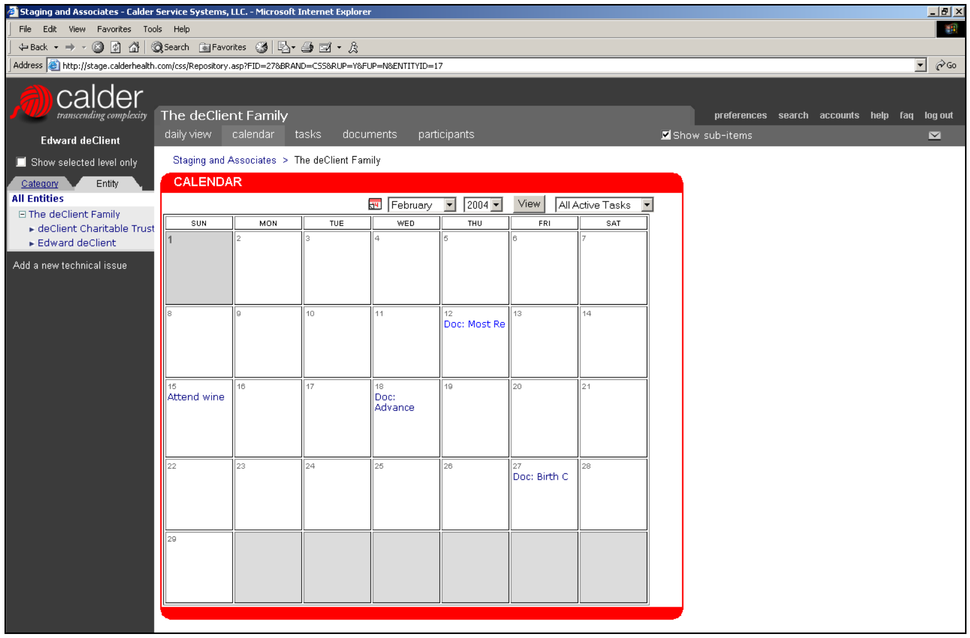

Figure 15. Calendar page (monthly view)

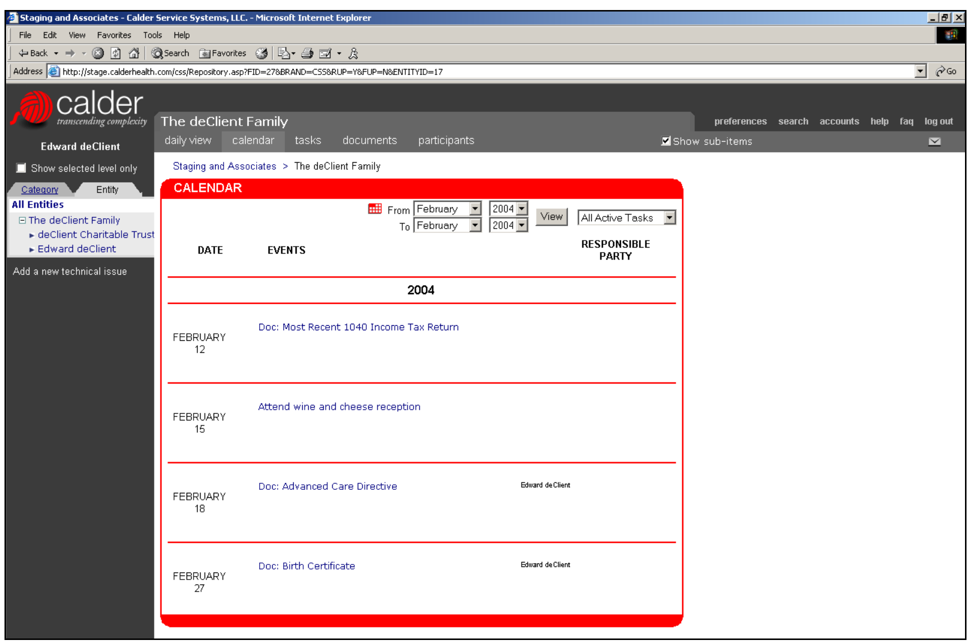

Figure 16. Calendar page (list view)

You can set your Calendar page to open to either the list view or the monthly view (see ***Preferences***).

Tasks page

The Tasks page displays all tasks for the selected entity. To open the Tasks page, click Tasks on the main navigation bar. For more information about tasks, see ***Tasks***.

Show sub-items. If the Show sub-items checkbox is not selected, the Tasks page shows tasks from only the current entity. If the checkbox is selected, the page shows tasks from the current entity, and also from any sub-entities contained within the current entity (provided you are a participant in the sub-entities). Tasks from sub-entities you do not participate in are not listed.

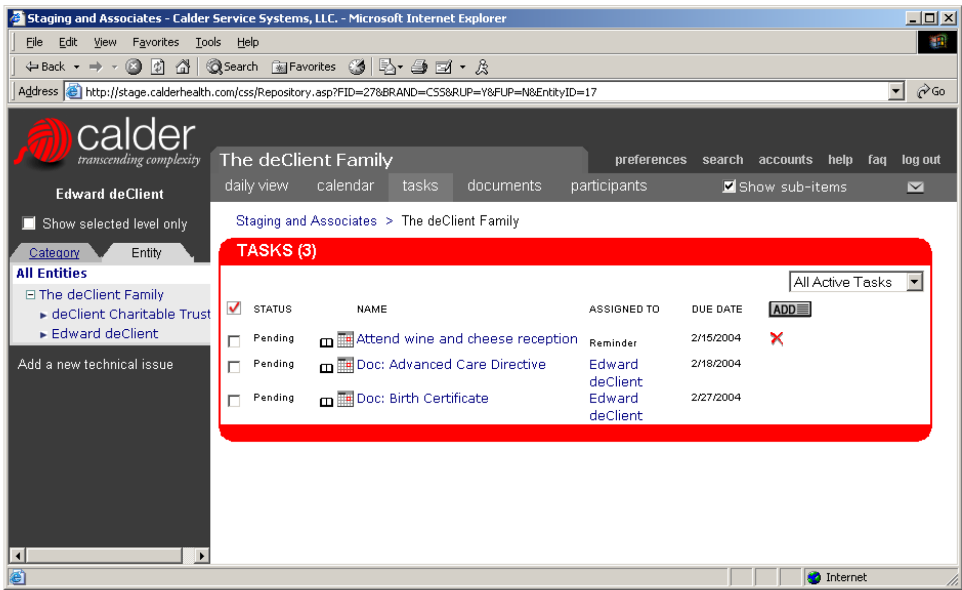

Figure 17. Tasks page

Documents page

The Documents page displays all the documents for the selected entity. To open the Documents page, click Documents on the main navigation bar.

For more information, see ***Documents***.

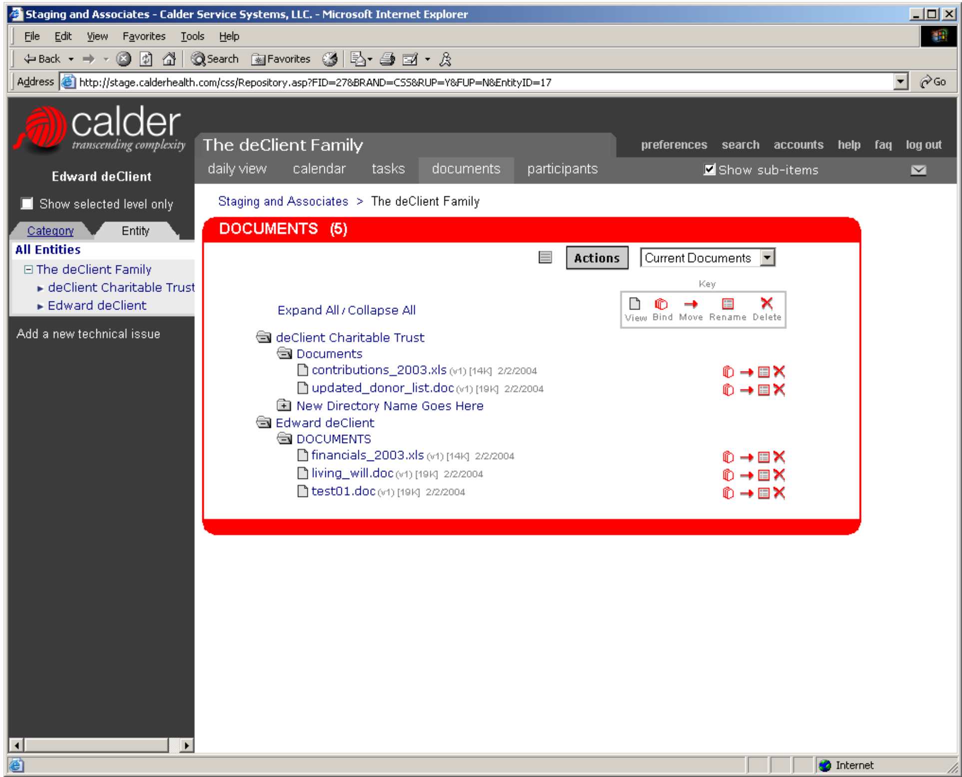

Figure 18. Documents page

Participants page

The Participants form displays all participants for the selected entity. When All Entities is selected, the Participants form displays all participants for any entities in the service site.

To open the Participants form, click Participants on the main navigation bar.

For more information, see ***Participants***.

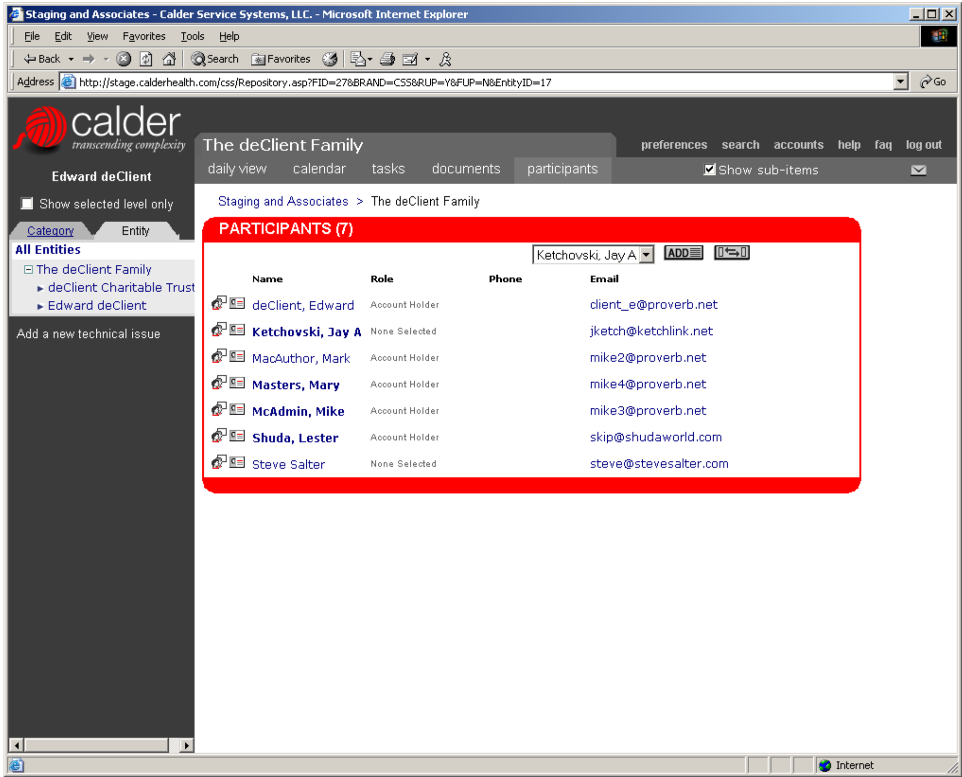

Figure 19. Participants page

Email page

The Email page displays a form you can use to send email. You can send email to other participants, or to any Internet email address. To open the email page, click the email icon on the main navigation bar. For more information, see ***Send email from ServiceLogic***.

Service sites and repositories

About service sites

A service site is a portal for a repository of related information. Each service site has its own repository. For example, the Advisor Demo site is a service site for a fictional network of financial advisors and their clients. The repository contains all the entities for the network.

Entities in one service site are not available from another service site. Since ServiceLogic users may be assigned to have access to some sites but not others, you can organize service sites to provide security and privacy for your client's information.

When you are working in ServiceLogic, you can open any service site you have access to. Your access to a service site is assigned by your ServiceLogic administrator.

- When you log in, ServiceLogic prompts you to select a service site. If you only have access to one service site, you will not see this prompt.
- After you log in, you can change to another service site by using the unlabeled drop-down list on the navigation pane (Figure 20). If you have access to only one service site, you will not see this list

Note that the name of the current service site is displayed on the 'breadcrumb trail' (below the main navigation bar).

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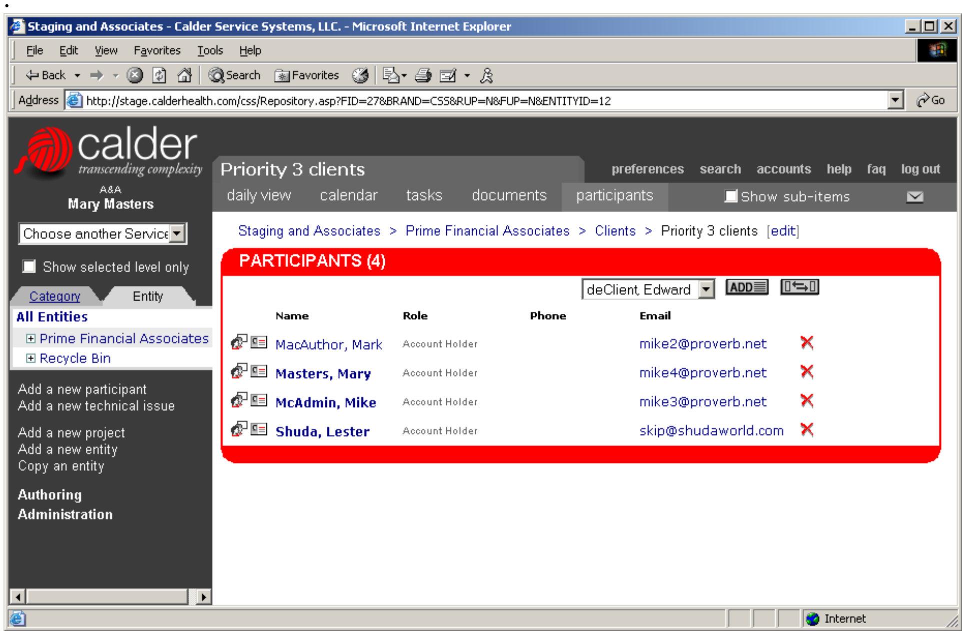


Figure 20. Selecting a service site

Entities and projects

About entities and projects

Entities

An entity serves to contain information about an account, an institution, or an individual. Entities may contain information such as documents or scheduled tasks and events. Each aspect of a client's life, business, or portfolio may be represented as an entity, which you may create and define.

ServiceLogic allows you much flexibility in creating and organizing entities:

- An entity may represent a specific item such as an individual, institution, or financial account, and may contain all the information related to that entity.
- Alternatively, an entity may be created with minimal information, simply as a container for other sub-entities.

Upload documents. You can upload your client documents and include them in specific entities. The uploaded documents are stored on the ServiceLogic server and are available to any participant assigned to the entity (see ***Upload a document***).

Create tasks and issue notifications. You can create and schedule tasks within an entity. For example, in a corporate entity you can create a recurring task to file quarterly taxes, and you can designate who should receive an email reminder (see ***Create a task***).

View entities. ServiceLogic allows you to arrange entities in a hierarchical view. Entities may contain other entities, so you can order your client's business entities in logical groups.

Assign access permission. Each entity has a list of assigned participants who are authorized to open and view the entity. Only authorized participants (or users with Admin permission) may view tasks or documents for the entity.

Projects vs. entities

An entity contains pre-defined documents and sequenced tasks that are specific to the type of entity (corporation, trust, insurance policy, financial plan, etc.). After you create an entity, you must manage and schedule the tasks and documents included in the entity.

A project is a special type of entity that does not initially include documents or tasks. Therefore, projects do not carry the overhead of ongoing management of tasks and document. Since projects do not carry the overhead of managing tasks and documents, projects are especially suited for flexible or short-term efforts. Projects are also useful if you want to create an item in your service site that contains other projects or entities, but is not directly associated with tasks or documents.

After a project is created you may add your own tasks and documents just like any other entity.

Projects behave identically to entities with the following exceptions:

- Projects are based on an entity template that does not include tasks. When you create a project, you are not prompted to select documents or tasks. However, you can add documents and tasks to a project after it is created.
- Entities require you to assign an ID number, which is intended to be an official number such as an account number, or a tax ID number (SSN, TIN, or EIN). Projects

do not require an ID number, so projects can be used to represent work that is not associated with an ID number.

- ServiceLogic provides a special form for creating projects (see ***Add a new project***).

For example, a project might be used to contain:

- A series of facilitated meetings so a family with operating assets can draft a "Family Mission Statement" or "Family Constitution."
- Work between an attorney and a couple around producing an ante-nuptial agreement.
- A project set up as a sub-entity of the family business that is focused on management and ownership succession planning.

Sub-entities

A sub-entity is an entity or project that is contained within another entity or project. In the navigation view, sub-entities appear to be nested under the parent entity. See also: ***View or edit entity***.

How to...

Add a new entity

To add a new entity, you must have a permission level of Author or Admin (see *User permissions*).

Open the Entity wizard

1. In the navigation pane, click Add New Entity. The Create New Entity wizard opens to a Welcome page. On the Welcome page, click Begin Wizard to open Step 1.

Step 1: Decide where to put your new entity

2. If you want to add your new entity under another entity, select the entity from the Place Under list. If you don't want your new entity to be part of another entity, select Top Level.

Figure 21. Entity wizard: Step 1

Step 1 (continued): Choose a category

3. In the Category list, select a category that best describes the entity you are creating (for example, Corporation or Person).

Step 1 (continued): Choose an entity type

4. In the Type list, select an entity type that best describes the entity you are creating (for example, S-Corporation).

Step 1 (continued): Enter an entity name and ID number

5. Enter the entity name and an ID number, then click Next Step to open Step 2.
    - Entities require you to assign an ID number, which is intended to be an official number such as an account number, or a tax ID number (SSN, TIN, or EIN). Projects do not require an ID number, so projects can be used to represent work that is not associated with an ID number.

Step 2: Assign participants to entity roles

To assign a participant to an entity, you must assign the participant to a role in the entity.

The Step 2 form lists all the Assigned Roles for the selected entity type (in the example shown, the entity type is "S-Corporation"). The roles are determined by the template for the entity type. You can assign participants to the role, or you can add a new participant.

6. Select a participant name from the list next to each role. Each list contains all participants in the entity.

Step 2 (continued): Add new participants (roles)

Participants have a service site role as part of their participant profile (see ***About participants***). When you add a role in Step 2, the service site role of the selected participant is added to the entity, and the participant is assigned to the role.

7. Select a participant name from the list in the upper right, then click Add. The participant's service site role is added to the entity roles at the bottom of the Assigned Roles list.
    - If you don't see the users you want on the list, add them as participants to the service site (see Add participant to a service site).
    - Select the 'Send an invitation to each new participant' checkbox if you want to send an email notification (invitation) to each participant, advising that he or she has been added to the entity. If you don't want to send invitations, make sure the checkbox is not selected.

Figure 22. Entity wizard: Step 2

Step 3: Select tasks

Step 3 provides a list of tasks that are potentially required for the entity. The task list is determined by the entity's Task templates.

You can select the tasks you want to add to your new entity. In Step 5, you may assign a participant to each task you select here.

8. Select the checkbox next to each task you want to add to the new entity.

Step 3 (continued): Set the start date

The task schedule starts with the date entered in the Task Sequence Start Date, which is initially set to today's date. The due date of each task is determined by the entity template for the task.

9. In the Task Sequence Start Date box, enter the date you want the task schedule to start on, then click Adjust. All the task due dates are adjusted with respect to the new start date.

Step 3 (continued): Schedule tasks

10. For each selected task, select a due date from the Due On list. This date becomes the due date for the task .

11. For each selected task, select a reminder date from the Remind On list. A task reminder is sent on this date.

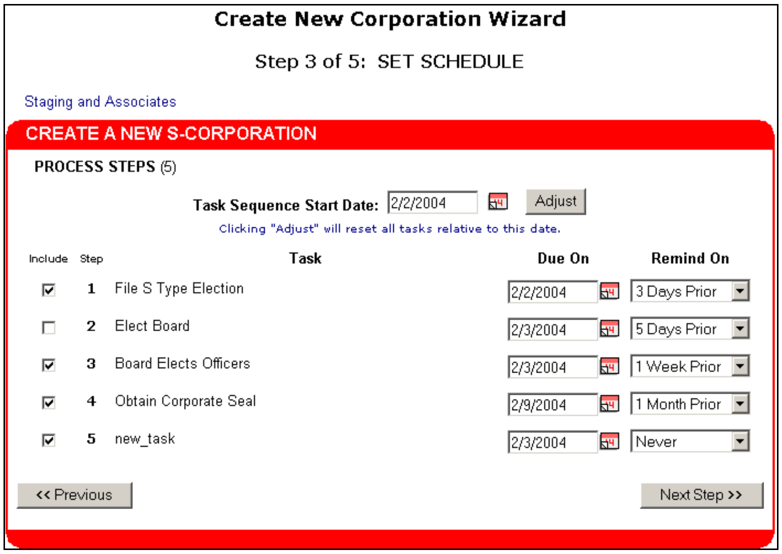


Figure 23. Entity wizard: Step 3

Step 4: Select documents

Step 4 displays documents associated with the tasks you selected in Step 3. The task template for the entity determines whether a task is associated with a document.

12. Select the checkbox next to each document you want to add to the new entity. For each selected document, ServiceLogic creates a document request task (see *Step 5*).

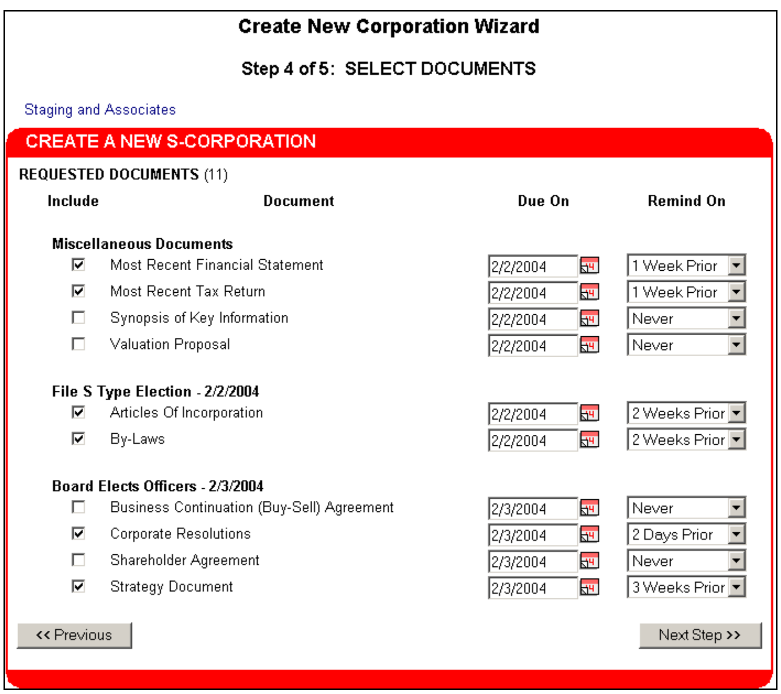


Figure 24. Entity wizard: Step 4

Step 5: Assign participants to document request tasks

Step 5 displays the document request tasks you selected in step 4. You can assign a participant to each task. The assigned participant is responsible for obtaining the document and uploading it to the entity.

13. For each task, select a participant from the Responsible Party list. The selected participant becomes the Responsible Party for the task.
    - The task is added to the participant's task list.
    - Select the 'Send an invitation to each new participant' checkbox if you want to send an email notification (invitation) to each participant, advising that he or she has been added to the entity. If you don't want to send invitations, make sure the checkbox is not selected.

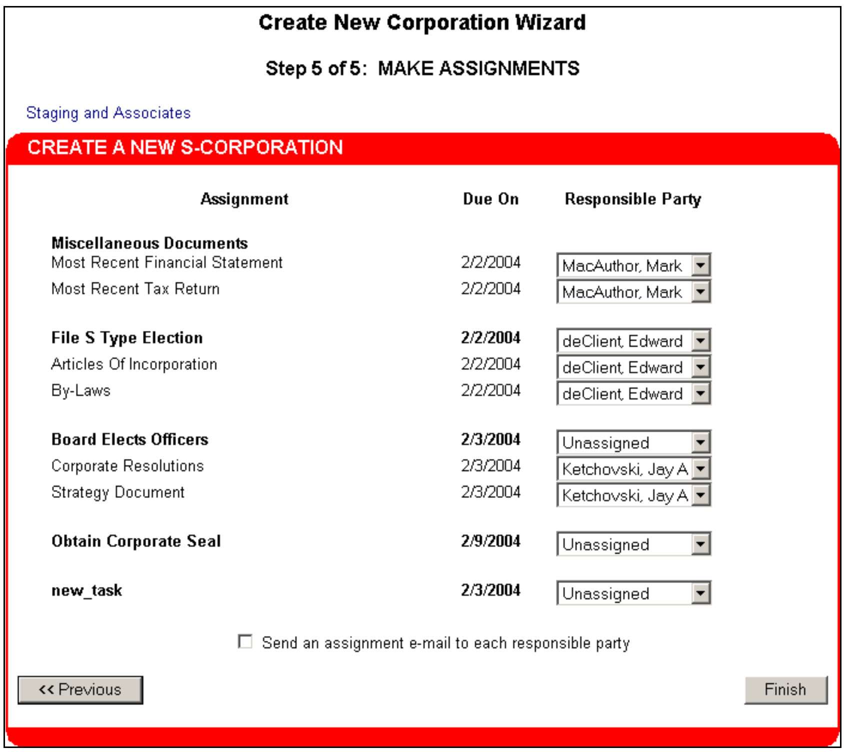


Figure 25. Entity wizard: Step 5

Finish creating the entity

14. Click Finish. The new entity is available in the navigation pane.

Add a new project

1. In the navigation pane, click Add a New Project. The Create New Project form opens.

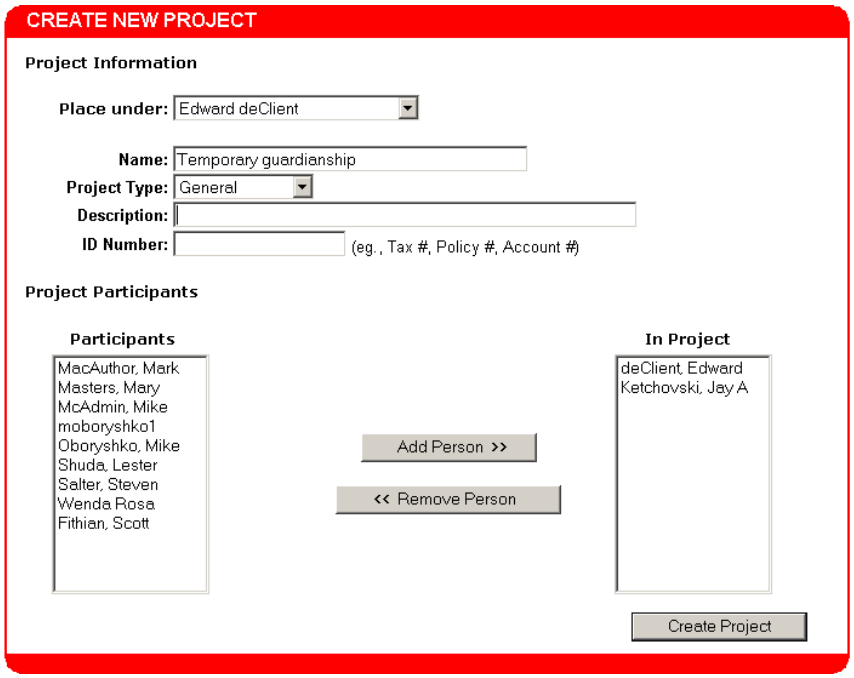


Figure 26. Add project

If you want to include your project within another entity...

2. Select an entity from the Place Under list. Your project will be created as part of the selected entity.
   - If you don't want to include your project under another entity, select 'Top Level.' (only available if you have Admin permission).

Enter a project name and type

3. In the Name box, enter the name of the project.
4. In the Project Type list, select a project type. The available types are determined by the entity Type template.

Add participants to the project

Only participants added to the project can access the project or its tasks and documents.

5. In the Participants list, select each participant you want to add to the project, then click Add Person. The participant is added to the In Project box.

Finish creating the project

6. Click Finish. The new project is available in the navigation pane.

View or edit entity information

To edit an entity, you must have a permission level of Admin or Author (see *User permissions*). If you do not have either Admin or Author permission, the Edit link is not available.

1. In the navigation pane, click the entity you want to edit.
2. Click the Edit link (under the main navigation bar). The Edit Entity Information form opens.

If you want to move the entity...

See *Sub-entities* for a description of moving entities to a parent entity.

3. In the Place Under list, select the new entity where you want to move the entity you are editing.
    - If you don't want the entity to be included in another entity, select "Top Level." When the move is complete, the entity is listed at the top level (no indent) on the navigation pane.
    - Participants must be assigned to each entity in order to have access to the entity (unless they are Authors or Admins - see *User permissions*). When you move an entity to a new parent, note that participants are not inherited or transferred to or from the parent entity.

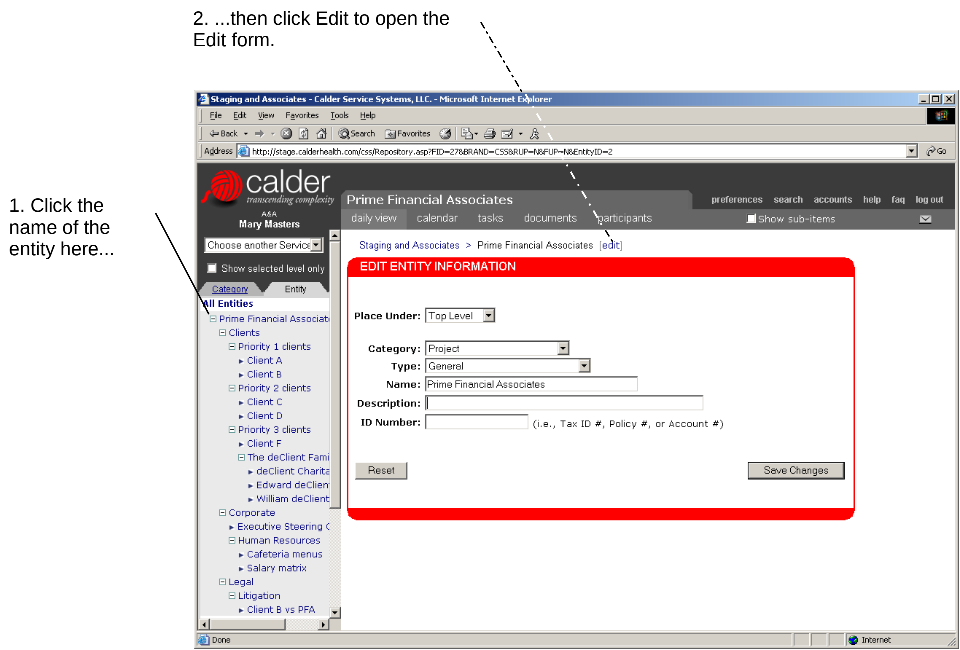


Figure 27. Viewing or editing an entity

Update the entity information

5. In the Category list, click the category you want to assign to the entity (see *Entities and categories*).
6. In the Type list, click the entity type you want to assign to the entity.

ServiceLogic uses the entity type to identify the tasks and documents associated with your entity.

- When you create a new entity via the entity wizard, you may only assign the entity types available for that category (see *Add a new entity*). But when you edit an entity, you can assign any entity type, even if your template does not match that entity type with the category.
- The entity wizard uses the entity type to suggest which documents and tasks should be assigned to the new entity. But when you edit an entity and change the entity type, ServiceLogic does not suggest the documents or tasks.

6. In the ID Number box, enter an ID number. For projects, ID Number is optional. But if you change the category from Project to any other category, ID Number is required.

Copy an entity

You can create a new entity by copying an existing entity. To copy an entity, you must have a permission level of Author or Admin (see *User permissions*).

1. In the navigation pane, click Copy an entity. The Create A New Entity From An Existing Entity form opens.
2. In the Source Entity list, click the entity you want to copy.
3. Enter the Entity Name and the ID Number of the new entity you want to create.
4. In the New ID Number box, enter the ID number of the new entity.

If you want to copy all tasks to the new entity...

5. Select the Include Tasks checkbox. All the tasks from the existing entity are copied to the new entity.
    - Task due times and statuses are also copied. For example, if a task is overdue in the existing entity, it is also overdue in the new entity.

If you want to copy all documents to the new entity...

6. Select the Include Documents checkbox. All documents, folders, and binders from the existing entity are copied to the new entity.

If you want to copy all participants to the new entity...

6. Select the Include Participants checkbox. All participants from the existing entity are copied to the new entity.
    - All Responsible Parties assigned to copied tasks become participants in the new entity, even if you did not select the Include Participants checkbox.

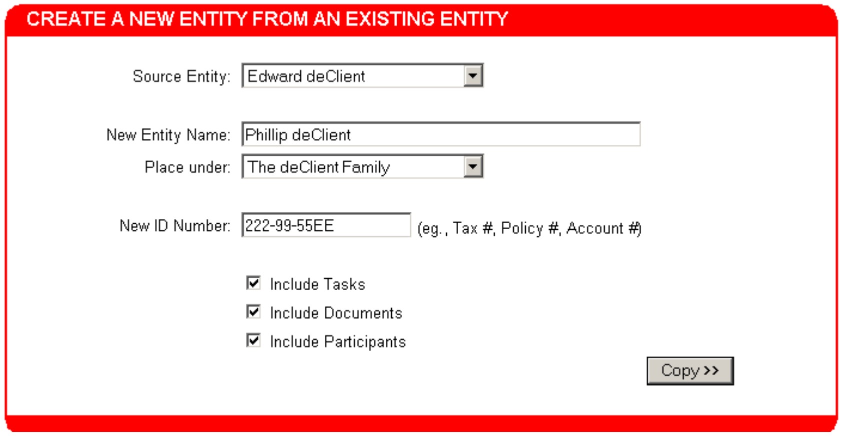


Figure 28. Copy an entity

Delete a entity

ServiceLogic does not provide a function to delete entities or projects, in order to maintain data integrity. However, if you want to remove an entity or project from the navigation view, you can move it to a "recycle bin" project. A Recycle Bin is a project you create for the sole purpose of containing entities or projects you wish to remove from the navigation pane, or other list of entities.

ServiceLogic does not come with a Recycle Bin project, but if you want this feature you can easily create it. You don't have to call it Recycle Bin - you can call it Trash, Trash Can, Deleted Entities, or whatever you want to call it. When you want to remove an entity, you can move it to your Recycle Bin.

To create a Recycle Bin project

For more information, see *Add a new project*.

1. In the navigation pane, click Add a new project. The Create New Project form opens.
2. In the Name box, enter "Recycle Bin" (or any other name you wish to give it).
3. In the Participants box, select all the participants and click Add Person to add all the participants to the Recycle Bin project.
4. Click Create Project.

To move an entity or project to your Recycle Bin project

For more information, see *View or edit entity information*.

1. Open the Edit Entity Information form for the entity or project you want to move.
2. From the Place Under list, select Recycle Bin.
3. Click Save Changes.

Participants

About participants

Participating in service sites

A ServiceLogic user must participate in one or more service sites to be able to log in. To add a participant to a service site, you must have a permission level of Admin.

For more information, see *User permissions* and *Add participant to a service site*.

Participating in entities and projects

Once a participant logs in to ServiceLogic and enters a service site, the participant can only view entities or projects he or she is assigned to as a participant

Since participants can only access information in entities or projects they participate in, you can organize your entities and assign participants to create a customized system of information security.

Participants and security

Every ServiceLogic user has a permission level that determines what functions the user can perform in a service site. This permission level is assigned by your ServiceLogic site operator (see *User permissions*).

Entity roles vs. repository roles

Each ServiceLogic user is assigned a role as part of the user profile (see ***Preferences***). However, when assigned to an entity a user may occupy entity roles that are different from their repository role. When you assign a participant to an entity via the Entity Wizard, you have the opportunity to assign participants to a different role (see *Add a new entity*).

To see a participant's entity role, select the entity, then click the participant's name on the Participants page.

Participants form

The Participants form displays all participants in the selected entity. When All Entities is selected, the Participants form displays all participants for the service site.

More precisely, the Participants form displays only participants in entities you have access to. If a participant is not assigned to any entities that you also participate in, then you will not see that participant listed on the Participants form.

When the 'Show sub-items' checkbox is selected, the Participants form shows participants from the current entity and all the entities beneath it (provide you have access to them).

To open the Participants form, click Participants on the main navigation bar.

- To re-invite the participant to the entity, click the Invite icon next to the participant's name (if the participant's account is disabled, the Invite icon does not appear).
- To export the participant's info to your Outlook contact list, click the Add to Outlook Contacts icon next to the participant.
- To view the participant's ServiceLogic profile, click the participant's name.

PARTICIPANTS (4)

deClient, Edward ADD

Name	Role	Phone	Email
MacAuthor, Mark	Account Holder		mike2@proverb.net
Masters, Mary	Account Holder		mike4@proverb.net
McAdmin, Mike	Account Holder		mike3@proverb.net
Shuda, Lester	Account Holder		skip@shudaworld.com

Figure 29. Participants form

Participants detail form

The Participants detail form (titled View Participant) displays the participant's user profile and preferences. To open the View Participant form, click the participant's name on the Participants form.

Users can change this information by updating their user preferences. For more information about each item, see ***Preferences***.

VIEW PARTICIPANT

Name: Robin User
Title:
Role: Account Holder
Organization:
Date of Birth:
SSN: 987654321
Phone: 555-555-5555
Alternate Phone:
Fax:
Email: robin@example.com
Address Line 1: 123 Main Street
City: Happy Town
State:
Zip: 12345
Country: United States

Go Back

Last Modified on 11/18/2003 4:50:48 PM by MOBORYSHKO

Figure 30. View Participant form

How to...

Add participant to a service site

To access an entity, a user must first be a participant in the service site, and also must be a participant in the entity.

To add a participant to a service site, you must have a permission level of Admin (see *User permissions*).

1. In the navigation pane, click Add a new participant. The Add A New Participant form opens.

2. Enter the email address of the participant you want to add, then click Add New Participant.

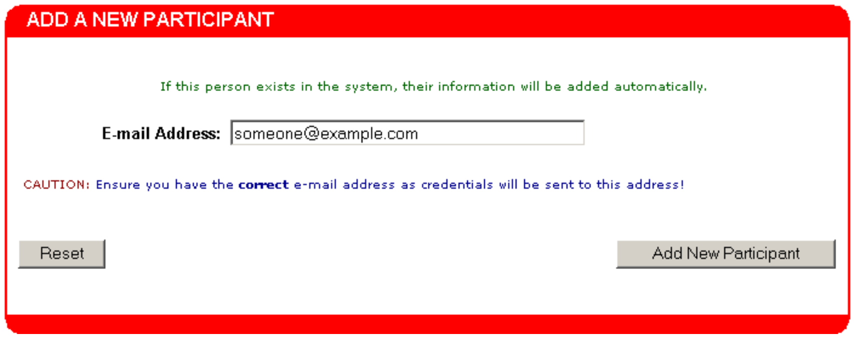


Figure 31. Add a participant to a service site

Add a participant to an entity

To add a participant, you must have a permission level of Admin.

Participants must be added to the service site before they can be added to the entity.

Add a participant: Method 1

This method is intended for quickly adding or removing participants one at a time.

1. Select the entity (click the entity name in the navigation pane).
2. Open the Participants page (click Participants in the main navigation bar).
3. In the unlabeled list, click the name of the participant, then click Add. The Preview Outgoing Email form opens displaying the Invitation to Entity email addressed to the participant. The email contains a standard message advising that he or she has been added to the entity.
4. On the Preview Outgoing Email form, click Send (or Don't Send).
   - Even if you don't send the email, the participant is still added to the entity.
   - If you want to send the email later, click the Invite icon next to the participant's name on the Participants form.

Add a participant: Method 2

This method is intended for adding or removing multiple participants.

1. Select the entity (click the entity name in the navigation pane).
2. Open the Participants page (click Participants in the main navigation bar).
3. Click the double-arrow icon. The Add or Remove Participants form opens.
4. In the ServiceSite Participants list, select all the participants you want to add to the entity, then click Add Person. The selected participants are added to the Entity Participants list.
   - To select multiple participants, press the SHIFT or CTRL key while you click the participants.
   - To remove a participant, select the participants in the Entity Participants list, then click Remove Person.

When you add a participant using the Add Participants form, ServiceLogic does not prompt you to send the Invitation to Entity email. If you want to send the email later, click the Invite icon next to the participant's name on the Participants form.

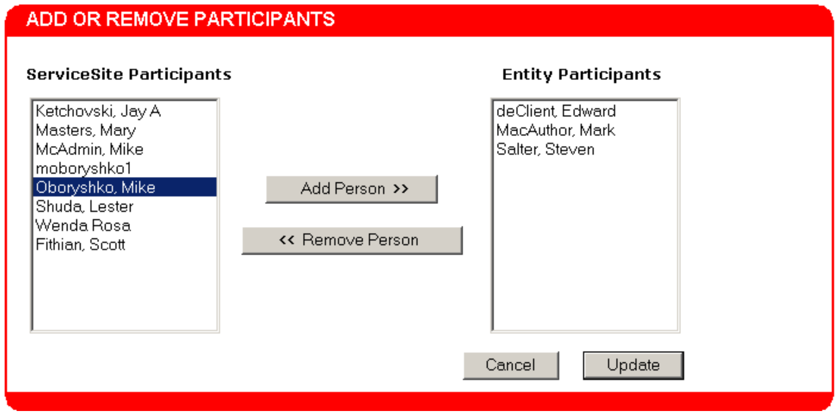


Figure 32. Add Or Remove Participants form

Remove a participant from an entity

To remove a participant from an entity, you must have a permission level of Admin. For more information, see *User permissions*.

When you remove a participant from an entity, that participant no longer has access to the entity or any information in the entity.

1. Select the entity (click the entity name in the navigation pane).
2. Open the Participants page (click Participants in the main navigation bar).

To remove participants one at a time

3. Click the Remove icon next to the name of the participant you want to remove.

To remove one or more participants

4. Click the double-arrow icon. The Add or Remove Participants form opens.
5. In the Entity Participants list, select all the participants you want to remove from the entity, then click Remove Person. The selected participants are added to the ServiceSite Participants list.
    - To select multiple participants, press the SHIFT or CTRL key while you click the participants.

Assign a participant to a task

When you create or update a task, you have the opportunity to assign a participant as the Responsible Party for the task. For more information, see ***Create a task***.

Export participant info to Outlook

ServiceLogic can export a participant's information to create a new contact in your Microsoft Outlook contact list.

When you export a participant's information, ServiceLogic creates a .vcf file containing the participant's information. You can open the file as an Outlook contact immediately, or you can save it on your computer to create the contact later.

You must have Outlook installed on your computer to open the participant information.

1. On the Participants page, click the Contacts icon next to the participant's name. The File Download dialog box opens.
2. In the File Download box, choose either Open or Save.
    - If you choose Open, Outlook opens a new contact with the participant's information. You must save the contact in Outlook to add the participant to your Outlook contact list.
    - If you choose Save, you are prompted to save the participant information on your computer as a .vcf file, and the Outlook contact is not created. Later you can use Outlook to create the contact by importing the .vcf file.

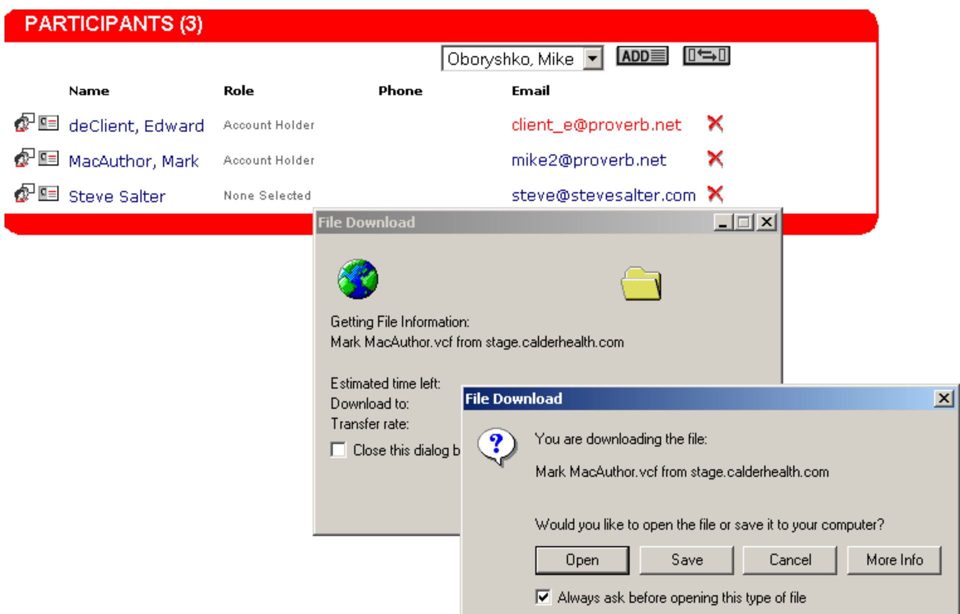


Figure 33. Export participant info to Outlook

Documents

About documents

ServiceLogic provides a number of features for managing your documents.

Upload documents. You can upload documents to entities in your service site. The documents are stored securely on ServiceLogic servers. Any electronic document can be uploaded, including Microsoft Office documents and Acrobat .PDF files.

Download documents. You can retrieve any document that has been uploaded your entities. Documents can be downloaded and saved on your PC, or you can view them in your browser without saving them.

Security. Documents are attached to entities, so only participants in that entity are able to view or download the documents.

Versioning. When you upload an updated version of a document, ServiceLogic stores the new version separately. You can always review and download all previous versions of documents that have been uploaded.

Organizing. You can create folders and binders to organize your documents within an entity. Folders work like folders in Windows Explorer - folders can contain documents or binders. Binders are containers that can contain multiple documents.

Sharing. You can email document links to other participants in the entity, or you can send the entire document as an attachment to any email address.

Search. You can use ServiceLogic's Search feature to find documents in your service site. You can search by the document name, by keywords in the document (full text search), or by document notes (notes may be added when you upload a document).

Auditing. You can view an audit report for each document. The audit report lists each time a document is uploaded, downloaded, moved, or deleted, and identifies the user who performed the transaction.

Documents form

The Documents form lists all documents in the selected entity. Click a folder name to expand the folder and see the documents in the folder.

- To open the Documents form, click Documents on the main navigation bar.

Documents form (with a selected entity)

When an entity is selected (by clicking the entity on the navigation pane), the Documents form displays documents for that entity. If the 'Show sub-items' checkbox is selected, document from sub-entities will also be displayed.

The form contains Actions button that provides a menu of additional document features. When All Entities is selected, the Actions button is not displayed.

The Actions menu contains these commands:

- Upload a new document
- Create a new folder
- Create a new binder

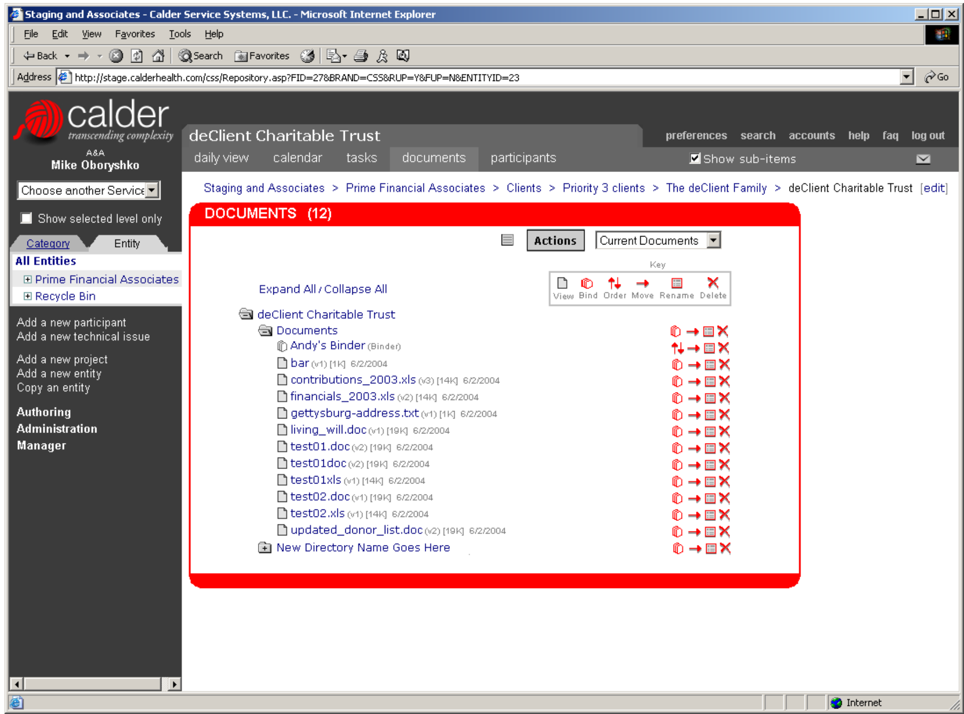


Figure 34. Documents form (with selected entity)

Documents form (with All Entities selected)

If All Entities or All Categories is selected, all entities in the service site are listed on the Documents form (*Figure 35*) and the Actions button is not displayed. Click an entity name on the form to expand the entity and see all folders in the entity.

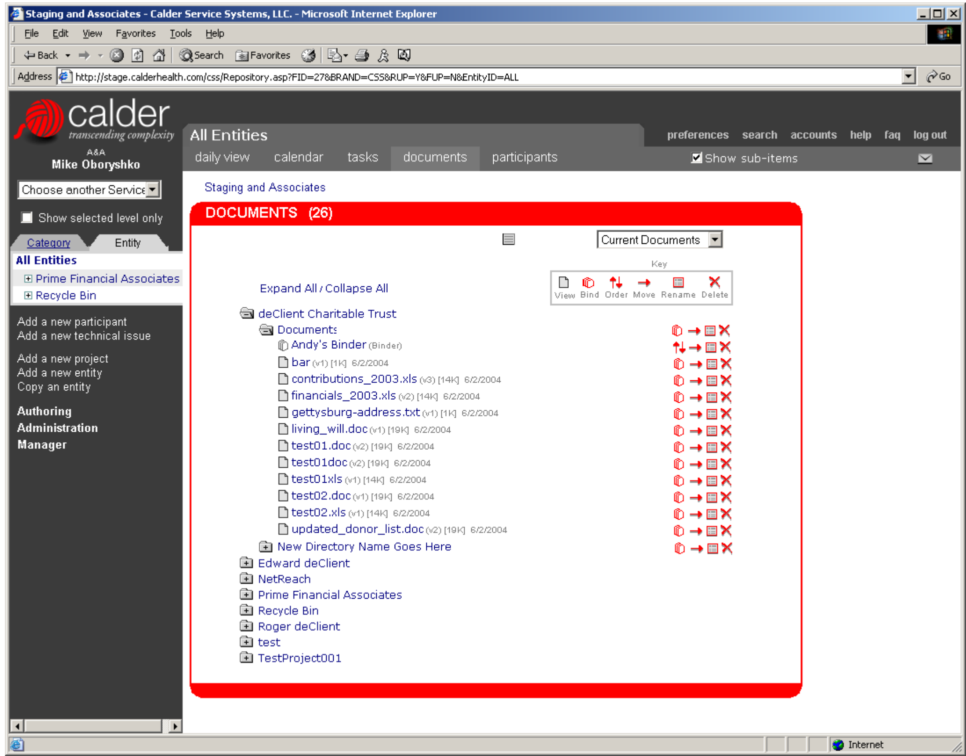


Figure 35. Documents form (with All Entities)

To view current or deleted documents

In the unlabeled list, select the documents you want to see on the Documents form:

- Select Deleted documents to see only deleted documents (current documents are not displayed)
- Select Current Documents to see all documents that have not been deleted (deleted documents are not displayed).

To open a document in your browser

- Click the document icon. The document opens in the browser.

Your browser must be able to locate the program required to open the document. If you have Microsoft Office installed on your computer, your browser is probably configured to open any Office document. If you have the Adobe Acrobat Reader installed, your browser is probably configured to open Acrobat (.pdf) documents.

If the browser cannot find the program to open the document, the browser prompts you to download the document instead.

To open the Document details form

- Click the name of the document (not the document icon) The Document details form opens.

To add a document to a binder

- Click the Bind icon to open the Add Document to a Binder form.

To move, rename, or delete a document, folder, or binder

- Click the Move icon to open the Move a Document form (or the Move a Folder or Move Binder form). See *Move a document, binder, or folder*.
- Click the Delete icon to delete the document, binder, or folder (see *Delete/undelete a document*).
- Click the Rename icon to open the Rename a Document form (or the Rename a Folder or Rename a Binder form)

Document Detail form

The Document Detail form displays information about the document. To open the Document Detail form, click the name of the document in the Documents form (see *Documents form*).

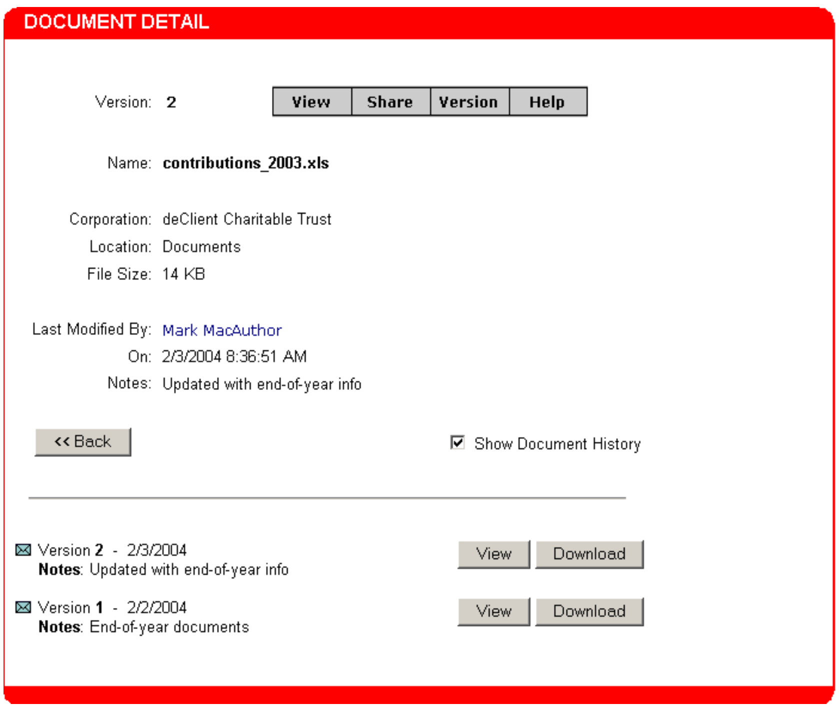
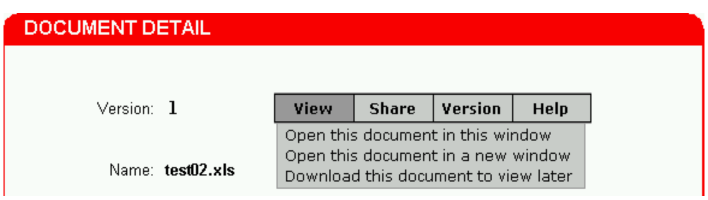


Figure 36. Document detail form

View

Click the View button to see the following commands:



- **Open this document in this window.** Opens the document in the current browser window.
- **Open this document in a new window.** Opens the document in a new browser window.
- **Download this document to view later.** Prompts you to save the document on your computer.

Share

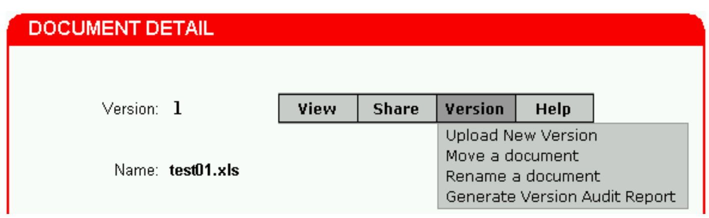
Click the Share button to see the following commands

- **Send a link.** Opens the Send Email to Members form, with a link to the document included in the email. You can edit the email before sending it (see ***Email***).
- **Send an attachment.** Opens the Send Email to Members form, with the document attached to the email. You can edit the email before sending it (see ***Email***).

Version

If you have a permission level of Reader the Version menu is not available. For more information, see *User permissions*.

Click the Version button to see the following commands:



- **Upload New Version.** Opens the Upload Document Directly form (see *Upload a document*).
- **Move a document.** Opens the Move a Document form (see *Move a document*).

How to...

Upload a document

To upload a document, you must have a permission level of User, Admin, or Author. Readers can view or download documents, but cannot upload, move, or delete documents. For more information, see *User permissions*.

Before you upload a document, make sure you have selected the entity you want to upload the document to.

1. Select the entity (click the entity name in the navigation pane).
2. Open the Documents page (click Documents in the main navigation bar)
3. On the Documents page, click the Actions button, then click Upload a new document. The Upload Documents Directly form opens (Figure 37).

Identify the files you want to upload

4. Click Add to open a list of files on your computer, then add the documents you want to upload. All the documents you want to upload must be listed in the Add Documents box.
   - You can also drag-and-drop documents from Windows Explorer to the Add Documents box.

Select or create a folder

All documents must be in a folder.

5. Select the folder from the Upload to Folder list, or create a new folder by entering the new folder name.
   - You can create sub-folders by typing a backslash (\) and then the new sub-folder name. For example, type 'Documents\MyFolder' to create a new folder called MyFolder under Documents.

If you want to add the document to a binder...

6. Select the 'Also add document to binder' checkbox, and select the binder name. The document is uploaded to the selected folder, and also added to the selected binder.

If you want to send notifications...

If you select the check box, all participants in the entity receive a notification of the document upload.

7. Select or clear the Send Notifications check box.

If you want to add document notes...

Document notes are comments or keywords you can store with the document. When you search for a document, ServiceLogic also searches the document notes (see *Find documents*).

8. Enter any document notes in the Include Notes box.

Finish uploading the documents

9. Click Upload to upload the documents to ServiceLogic.

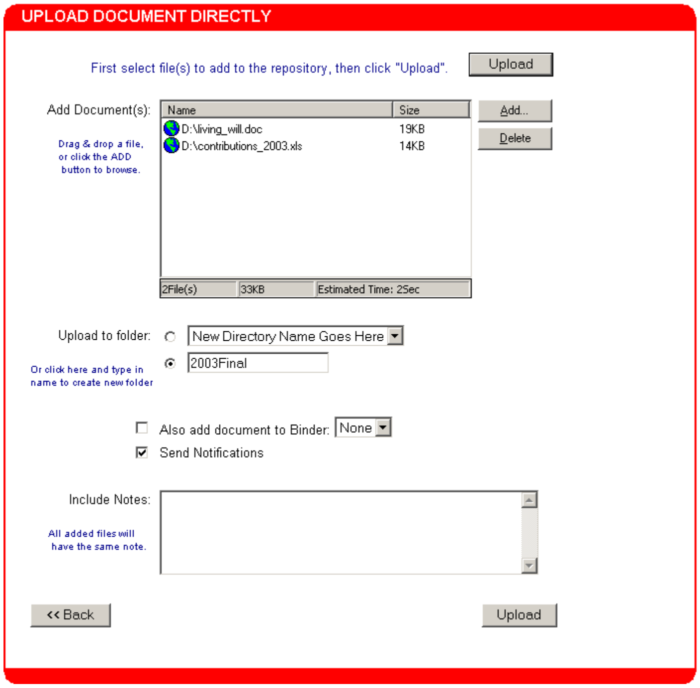


Figure 37. Upload Document Directly form

Move a document, binder, or folder

To move documents, binders, or folders, you must have a permission level of User, Admin, or Author. Readers can view or download documents, but cannot upload or move documents. For more information, see *User permissions*.

You can move documents, binders, or folders to a new entity, or to another folder in the current entity. When you move a document, binder, or folder, ServiceLogic does not create a notification. However, the move is recorded in the audit report (see *View a document audit report*).

1. On the Documents page, click the Move icon next to the document, binder, or folder you want to move. The Move A Document form opens (Figure 38). (or the Move a Folder or Move a Binder form).

Select an entity

2. Select the entity you want to move the document, binder, or folder to.

Select or create a folder

3. Select the folder from the Select new folder list, or enter a folder name to create a new folder.

Finish the move

4. Click Save Changes.

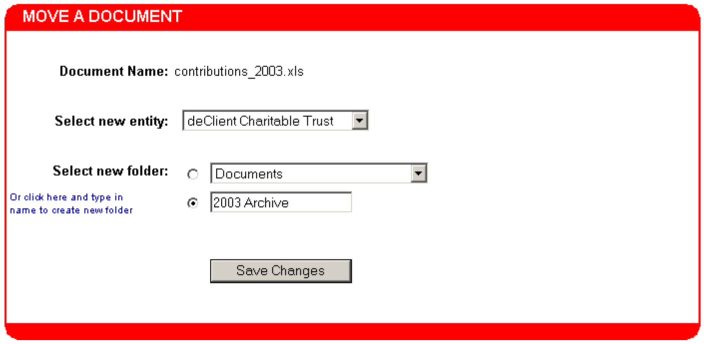


Figure 38. Move A Document form

Delete/undelete a document, binder, or folder

To delete or undelete a document, binder, or folder, you must have a permission level of User, Admin, or Author. Readers can view or download documents, but cannot upload, move, or delete documents. For more information, see *User permissions*.

Delete a document, binder, or folder

- On the Documents page, click the Delete icon next to the document, binder, or folder you want to delete.

When you delete a document, binder, or folder, it is not permanently deleted. ServiceLogic continues to store the document, binder, or folder, but the status is changed to Deleted and it is no longer displayed in the view of current documents (see *Documents form*).

Folders must be empty before they can be deleted. A folder cannot be deleted if it contains any documents or subfolders.

Some entities may contain "required" folders that can only be deleted by removing them from the entity template. See the Authoring Guide for more information.

When you delete a document, binder, or folder, ServiceLogic creates a notification (see *Notifications on your Daily View page*).

Undelete a document, binder, or folder

1. On the Documents page, select Deleted documents from the unlabeled list.
2. Click the Undelete icon next to the document, binder, or folder you want to undelete. The document becomes a "current document" and is no longer listed on the view of deleted documents. To view the undeleted document, binder, or folder, select Current documents from the unlabeled list on the Documents page.

Download documents

1. Open the Document Detail form for the document you want to download (see *Document Detail form*).
2. Click the View button, then click Download this document to view later.

Create a new folder

Before you create a folder, make sure you have selected the entity you want to create the folder in.

1. Select the entity (click the entity name in the navigation pane).
2. Open the Documents page (click Documents in the main navigation bar)
3. On the Documents page, click the Actions button, then Create a new folder. The Add A New Folder form opens (Figure 37).
4. In the Folder Name box, enter the name of the folder you want to create.
   - Spaces are permitted in the folder name.
5. In the Place Under list, select the folder you want to put the new folder in. The new folder is contained (nested) within the folder you select here. If you don't want your new folder to be nested, select (Make Top Level).

Also see *Create nested folder*.

Figure 39. Add A New Folder form

Create nested folders

Before you create a folder, make sure you have selected the entity you want to create the folder in.

1. Select the entity (click the entity name in the navigation pane).
2. Open the Documents page (click Documents in the main navigation bar)
3. On the Documents page, click the Actions button, then Create a new folder. The Add A New Folder form opens (Figure 37).

Create a nested folder: Method 1

In the Place Under list, select the folder you want to add your new folder to.

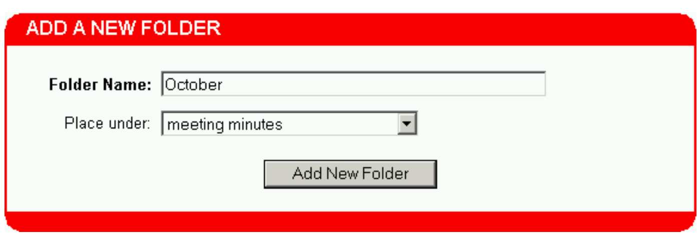


Figure 40. Add a nested folder

Create a nested folder: Method 2

In the Folder Name list, enter the nested folder names separated by a slash (/). For example:

meeting minutes/October

or

meeting minutes/2003/October

If any of the folder names do not exist, ServiceLogic creates the folder.

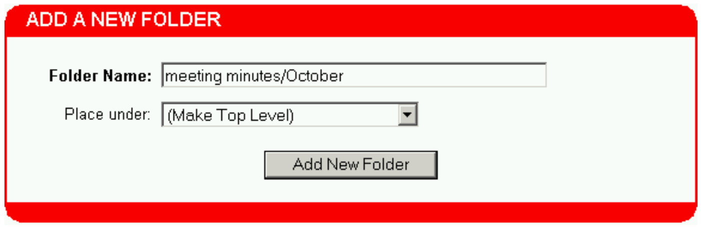


Figure 41. Add a nested folder (nested path names)

Create a binder

You must create a new empty binder before you can add documents to the binder. You can add documents to a binder when you upload documents.

1. Select the entity (click the entity name in the navigation pane).
2. Open the Documents page (click Documents in the main navigation bar)
3. On the Documents page, click the Actions button, then click Create a binder. The Add A New Binder form opens.
4. In the Binder Name box, enter the name of the binder you want to create.
5. In the Upload to Folder box, select the folder you want to create the binder in.
   - To create a new folder, enter the new folder name in the box.

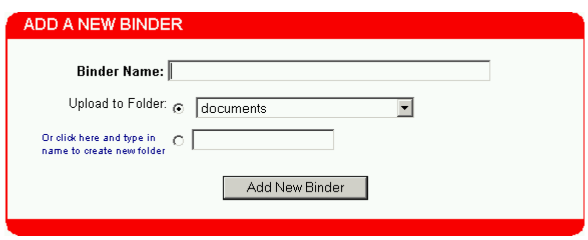


Figure 42. Add A New Binder form

Add a document to a binder

1. Select the entity (click the entity name in the navigation pane).
2. Open the Documents page (click Documents in the main navigation bar)
3. On the Documents page, click the Bind button next to the document you want to add to a binder. The Add Document to a Binder form opens.
4. Select the binder you want to move the document to, then click Add to Binder.

- When you add a document to a binder, the document also remains in the original folder.
- If you delete the document in the folder, the document in the binder remains visible and is not deleted.

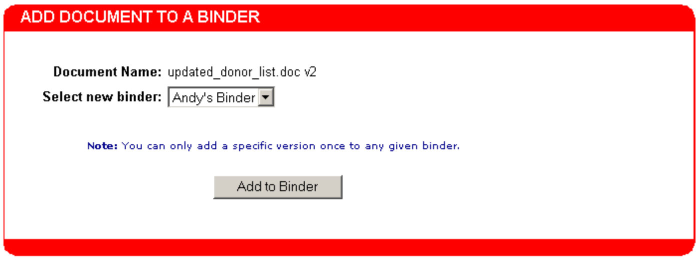


Figure 43. Add Document to a Binder form

Reorder documents within a binder

To change the order in which documents are listed in a binder:

1. On the Documents page, click the Order icon next to the binder you want to reorder. The Reorder Binder Items form opens, which shows you a list of the documents in the binder.
   - The Reorder icon:
2. On the Reorder Binder Items form, select the document you want to move, then click Move Up or Move Down.

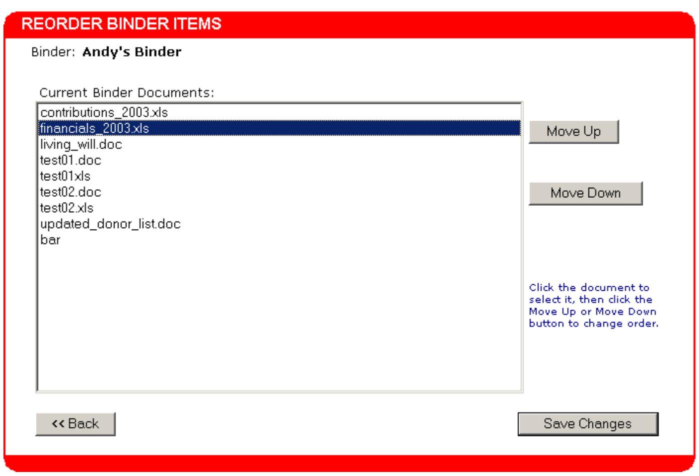


Figure 44. Reorder Binder Items form

Delete a folder or binder

On the Documents page, click the Delete icon next to the folder or binder you want to delete.

You must be an Administrator to delete a folder. If you do not have Administrator permission, the Delete icon is not available for folders.

- Delete icon: 

Open a document in your browser

From the Documents form

- On the Documents form, click the View icon next to the document name. (see *Documents form*).

From the Document Detail form

1. Open the Document Detail form for the document (see *Document Detail form*).

2, Click the View button then click:

- **Open this document in this window** to open the document in the current browser window.
- **Open this document in a new window** to open the document in a new browser window.

Find documents

You can use ServiceLogic's Search feature to find documents in your service site.

1. Click Search on the top navigation bar. The Search Service Site form opens.
2. In the Search for box, enter a keyword you want to search for.
3. Click Search.

The search returns all documents that contain your keyword in the document name, in the document text, or in the document notes.

If Show Abstracts is selected, the search results show some of the text (an abstract) with each document found in the search.

The percentage (in the left column of your search results) indicates how closely the document matches your search. Better matches are assigned a higher percentage.

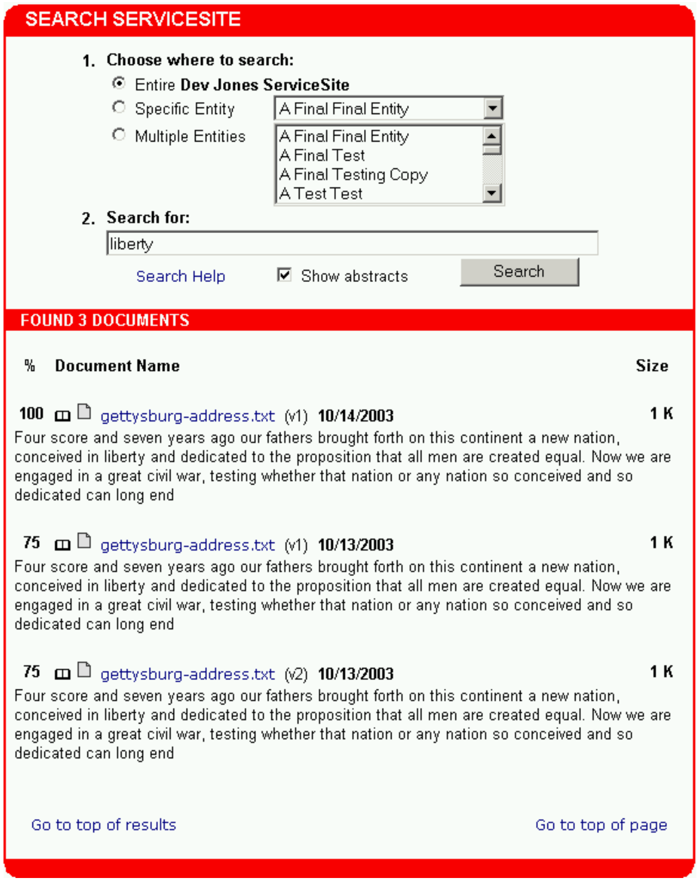


Figure 45. Search Service Site form

Send documents by email

You can email document links to other participants in the entity, or you can send the entire document as an attachment to any email address.

Before sending a document, consider who you want to have access to it:

- When you send a link, you continue to store the document securely within ServiceLogic. The recipient must log into ServiceLogic to open the link, and can only open the document if he or she is a participant to the entity that contains the document.
- When you send the document as an attachment, a copy of the document leaves ServiceLogic and is sent to the recipient, potentially over Internet email servers. The recipient can open the document without logging into ServiceLogic.

Send a document: Method 1

1. Open the Document Detail form for the document you want to send (see *Document Detail form*).
2. Click the Share button, then click either Send a link, or Send an attachment.

   The Send Email To Members form opens with a new message. The message includes the document as an attachment or a link.

3. Complete and send the email (see ***Send email from ServiceLogic***).

Send a document: Method 2

You can attach the document when you send an email (see ***Send email from ServiceLogic***).

View a document audit report

You can view an audit report for each document. The audit report lists each time a document is uploaded, downloaded, moved, emailed, or deleted, and identifies the user who performed the transaction.

1. Open the Document Detail form for the document you want to audit (see *Document Detail form*).
2. Click the Version button, then click Generate Version Audit Report.

Tasks

About tasks

A ServiceLogic task is an item you can schedule on a calendar and assign to a participant. ServiceLogic tracks the task due date and issues notifications to the designated participants.

- When you create a new entity, ServiceLogic prompts you to include the appropriate tasks for that entity (based on the entity template), assign a participant to the task, and set notifications for the task.
- After you create an entity you can add a new task and assign a participant to the task, and set notifications for the task.

The participant assigned to a task is known as the Responsible Party for the task. The Responsible Party can open the task and mark it with one of three statuses: Accepted, Declined, or Completed.

Tasks form

The Tasks form displays all tasks for the selected entity. To open the Tasks form, click Tasks on the main navigation bar.

Figure 46. Tasks form

- To open the task, click the task name.
- To mark a task completed, select the check box next to the task.
- To delete the task, click the Delete icon next to the task (the red X).
- To export the task to your Outlook calendar, click the calendar icon next to the task.
- To create a new task, click Add.

To change the task view, select a view from the unlabeled list. The view options are described in *Table 2* (below). You can set your Tasks form to open to any of the view options (see ***Preferences***).

Simple List	All tasks
My Active Tasks	Active tasks that are assigned to you. An active task is a task that is not completed or deleted.
All Active Tasks	All active tasks.
Overdue Tasks	All tasks that are past their due dates and have not been completed or deleted.
Completed Tasks	All tasks that have been marked Completed.
Next 7 Days	All tasks due 7 days from today.
Deleted Tasks	All tasks that have been marked Deleted.

Table 2. Task view options

Task Details form

The task details form is titled View Existing Task Information. To open the View Existing Task Information form, click the name of the task in the Tasks form (see *Tasks form*).

If you have Admin permission, the task details form is titled Edit Existing Task Information, and you can edit the task details.

See *Create a task* for more information about how to use each item in the Edit Existing Task form.

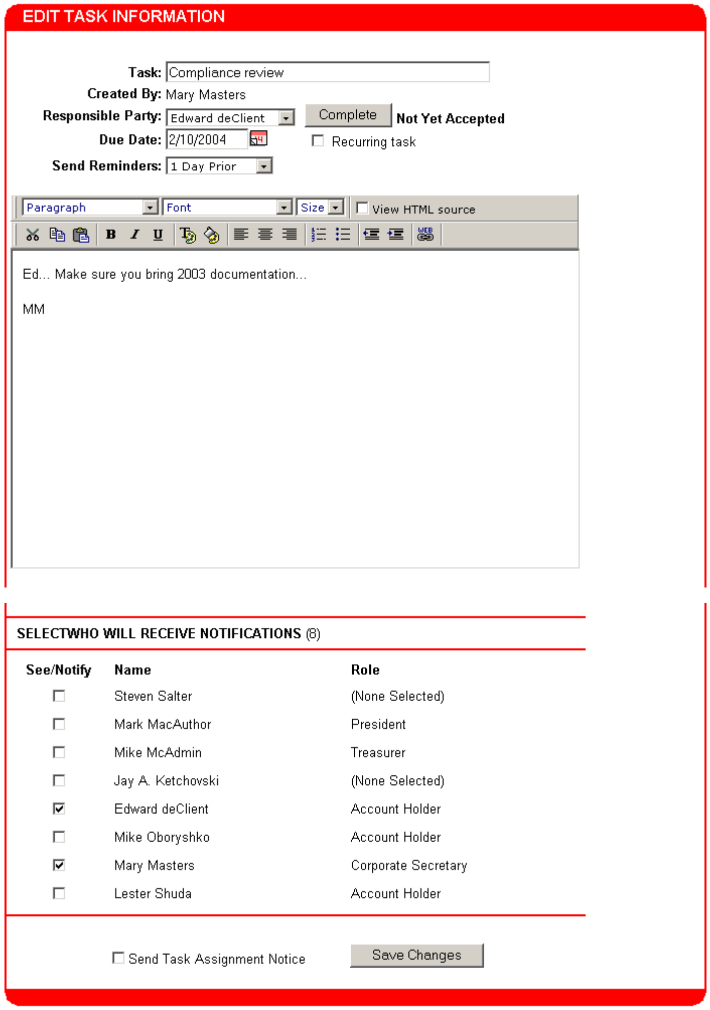


Figure 47. Task detail form (Edit Existing Task Information)

Complete, accept, or decline the task

Click the Complete, Accept, or Decline button to mark the task completed, accepted, or declined. The Accept or Decline buttons are only available if the task is assigned to you.

Responsible Party

To reassign the task to another person, select the participant from the Responsible Party list.

Recurring task

To make this task a recurring task, select the Recurring Task checkbox

Due Date

The date the task is due. ServiceLogic uses this date to calculate when the task is overdue, and when to send reminders.

Send Reminders

Indicates when to send the reminder.

Email form

Enter any message you want to include with the Task Assignment notice.

Select Who Will Receive Notifications

The selected participants receive all notifications for the task, are able to see the task listed in their navigation pane and on other views where tasks are listed. If the checkbox is not selected, the participant does not receive notifications and does not see the task listed on any view.

Send Task Assignment Notice

Select this checkbox if you want to send the Task Assignment notice to the Responsible Party.

How to...

Create a task

To create a task, you must have a permission level of User, Admin, or Author. Readers cannot create tasks. For more information, see *User permissions*.

When you create a new entity, the entity template determines which tasks may be added to the entity. The new tasks are created as part of the new entity.

You can also create a new task in an existing entity:

1. Select the entity (click the entity name in the navigation pane).
2. Open the Tasks page (click Tasks in the main navigation bar).
3. On the Tasks form, click the Add button. The Add A New Task form opens.
4. In the Task box, enter the name you want to give to the task. ServiceLogic uses this name to identify the task in notifications.

Assign the task to a participant

The participant you assign to the task is called the Responsible Party.

5. In the Responsible Party list, click the name of the participant you want to assign to the task.
   - The list contains only participants to the entity who have a permission level of User, Admin, or Author. Readers cannot be assigned to tasks.
   - If the person you want to assign is not listed, you must first add that person to the entity before you can assign him or her to the task (see *Add a participant to an entity*).
   - If you don't want to assign the task to a participant, select General Reminder in the Responsible Party list.

Enter a due date and set a reminder

A reminder is a notification that appears on the Daily View page of the Responsible Party.

6. In the Date box, enter the date the task is due.
7. In the Send Reminders list, select when you want the reminder to be sent.

If you want a recurring task...

Recurring tasks are tasks that repeat at a regular interval (Daily, Weekly, Monthly, Yearly).

8. To make the task a recurring task, click the Recurring Task check box. The recurring period fields are displayed.

9. Click the recurrence interval you want (Daily, Weekly, Monthly, Yearly).

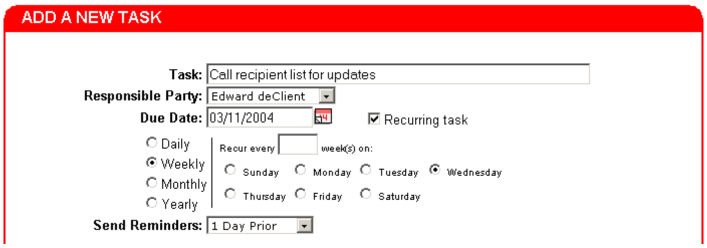


Figure 48. Recurring tasks

Provide access to the task for other participants

At the bottom of the form, locate the section labeled Select Who Will Receive Notifications.

10. Select the checkbox next to every participant who should have access to the task.

    - The participants you select are able to view the task on their calendar or task pages, and receive all notifications for this task, including task reminders.
    - The participants not selected cannot see the task on their calendar or task pages, and do not receive notifications for this task.

If you want to send a Task Assignment email ...

You can optionally send a Task Assignment email to the Responsible Party. The email contains a standard message advising that he or she has been assigned to the task, and includes a link to the task. The Responsible Party may open the task and accept, decline, or mark the task completed.

11. Enter any additional message you want to include in the email form.

12. Select the Send Task Assignment Notice checkbox.

    - If you selected General Reminder, this check box is not available (because there is no Responsible Party).

13. Click Add New Task. The task is added immediately.

Preview and send the Task Assignment email message

If you selected the Send Task Assignment Notice checkbox, the Preview Outgoing Email form opens displaying the Task Assignment message. You can preview and edit the message, then you can optionally send the email.

14. On the Preview Outgoing Email form, click Send (or Don't Send).

    - Even if you don't send the email, the task is still created, and the participant is still the Responsible Party assigned to the task.

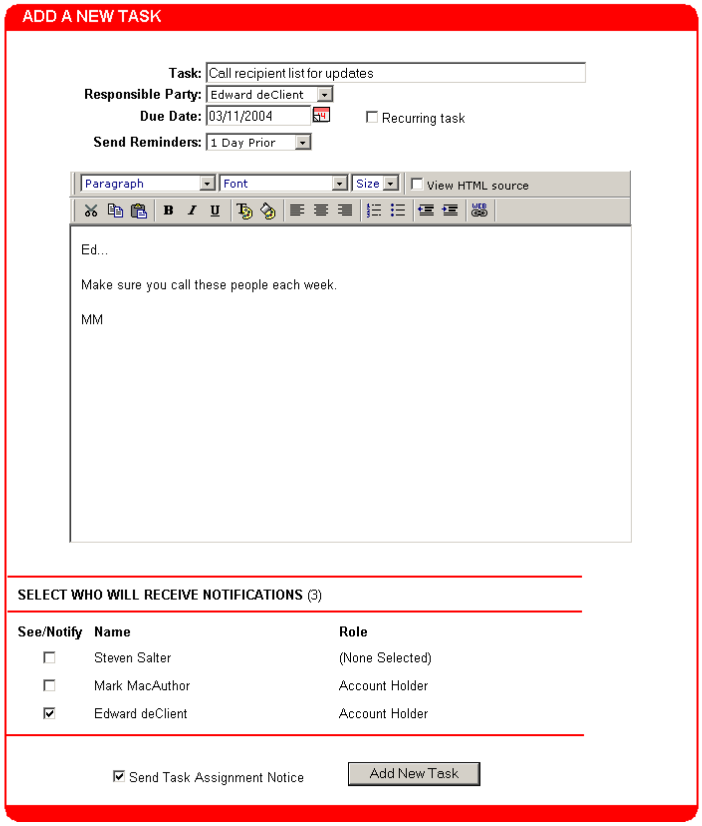


Figure 49. Add a new task

Accept, decline, complete a task

Your tasks (the tasks assigned to you) are listed on your Tasks page. When a task is assigned to you, you have three options: you can mark the task Accepted, Declined, or Completed.

To accept, decline, or complete a task:

1. On your Tasks page, click the name of the task you want to accept, complete, or decline. The Edit Existing Task Information form opens.
2. Click the Complete, Accept, or Decline button (the Accept or Decline buttons are only available if the task is assigned to you).

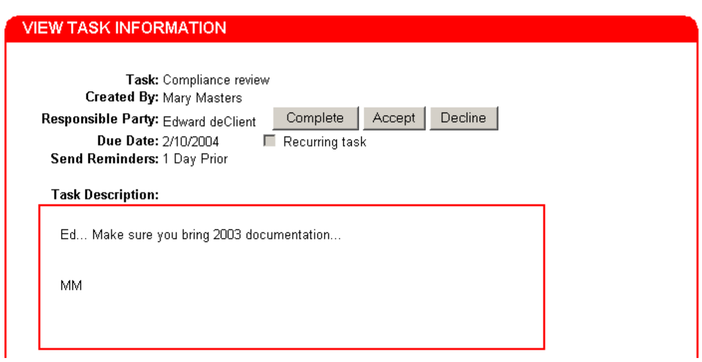


Figure 50. Complete, accept, or decline a task

Reassign a task

1. On the Tasks form, click the name of the task you want to reassign. The Edit Existing Task Information form opens.
2. In the Responsible Party list, click the name of the person you want to reassign the task to, then click Save Changes.

Export task info to Outlook

ServiceLogic can export task information to create a new appointment on your Microsoft Outlook calendar.

When you export task information, ServiceLogic creates a .vcs file containing the task information. You can open the file as an Outlook appointment immediately, or you can save it on your computer to create the appointment later.

You must have Outlook installed on your computer to open the participant information.

1. On the Tasks page, click the Calendar icon next to the task name. The File Download dialog box opens.
2. In the File Download box, choose either Open or Save.
   - If you choose Open, Outlook opens a new appointment with the task information. You must save the appointment in Outlook to complete the export.
   - If you choose Save, you are prompted to save the task information on your computer as a .vcs file, and the Outlook appointment is not created. Later you can use Outlook to create the appointment by importing the .vcs file.

ServiceLogic tasks are opened in Outlook as one-hour appointments on the task due date. You can adjust the time before saving the appointment in Outlook.

Email

ServiceLogic provides an email form for sending email to other participants, or to any email address. All participants' email addresses are stored in their user profiles (see *Preferences*).

Note that ServiceLogic does not store your sent emails.

Send email from ServiceLogic

1. Click the email icon on the main navigation bar. The Send Email to Members form opens (Figure 51).

Add one or more recipients

The participant list (the unlabeled list on the right) lists all the participants in the service site.

2. In the participant list, select all the recipients for this email, then click To, CC, or BCC to add the recipients to the email.
   - To add a recipient who is not a participant, enter the email address in the unlabeled box.
3. In the Subject box, enter a subject line for the email.

Choose a message format

4. Choose Text or HTML as the format for your email.
   - If you choose Text, your message is sent as plain unformatted text, and links may not be enabled in some email readers.
   - If you choose HTML, your message is sent as formatted HTML, and links are enabled. However, note that your recipient's email reader may not be configured to view HTML messages.

Edit your message

5. Enter any text for your email.
   - You can use the toolbar to format your text.

If you want to send a document...

Note that when you send a document as an attachment, anyone who receives the attachment can open and view the document.

6. Click Attachment from Repository. The Select Email Attachments form opens. You can add one or more documents to your message as a link or as an attachment.

Send the message

7. When you are finished with the message, click Send.

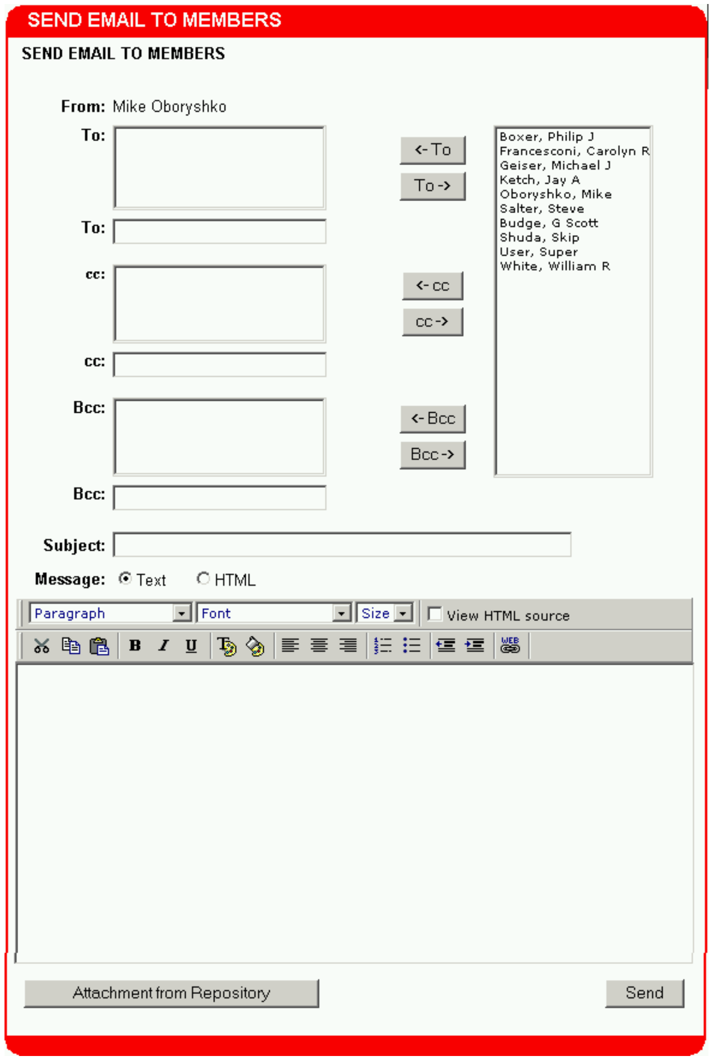


Figure 51. Send Email to Members form

Preferences

The Preferences page provides personalized settings for your user account. Select the settings you want, then click Save Changes.

To open the Preferences page, click Preferences on the top navigation bar.

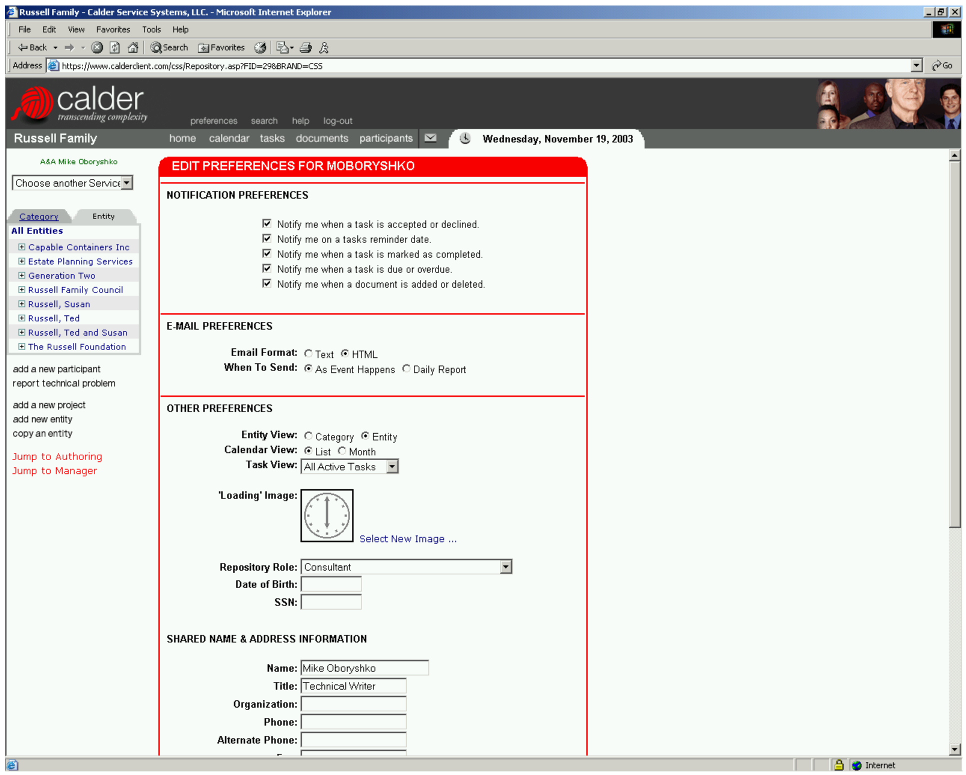


Figure 52. Preferences

Notification preferences

When you log in, your Daily View page displays messages notifying you of transactions in entities you participate in (see *Notifications on your Daily View page*). To choose which notifications you want to see, select or clear the checkbox next to each notification.

Email preferences

Email format

Choose the format of emails you receive (text or html). All mail sent to you from ServiceLogic will be in the format you select here.

This preference affects only email you receive, not email you send. When you send an email using ServiceLogic's email feature, you can select the format of each message when you compose it.

When to send

Choose when you want to receive email notices from ServiceLogic:

- As event happens - Email notices are sent to you as individual emails as soon as the event occurs.
- Daily report - All email notices are sent to you in a single email message each day.

Other preferences

Entity view

Select the default view you would like to see in the Navigation pane (Category or Entity). See *Entities and categories.*

Calendar view

Select the default view for the Calendar form (List or Month) See *Calendar page*.

Task view

Select the default view on the Tasks page. See *Tasks page*.

Loading image

The Loading Image is an animated icon that displays while ServiceLogic is loading a page. The default image is a clock. To change the loading image, click Select New Image.

Repository role

Select the role assigned to the user. The roles available in the list are determined by the role templates (see *About participants*).

A user may occupy entity roles that are different from their repository role. When you assign a participant to an entity via the Entity Wizard, you have the opportunity to assign participants to a different role (see *Add a new entity*).

To see a participant's entity role, select the entity, then click the participant's name on the Participants form.

Date of birth

The user's date of birth (optional).

SSN

The user's Social Security number (optional).

Shared name and address information

Contains the user's contact information, including email address. ServiceLogic sends all emails for this user to this email address.

To change your ServiceLogic email address, enter the new address here.

Change Password

Use this section to change your password. (see *Change your password*).

How to...

Change your password

1. On the top navigation bar, click Preferences. The Preferences form opens.
2. In the Old Password box, enter your current password.
3. In the New Password box, enter the new password.
4. In the Retype New Password box, retype your new password.
5. Click Save Changes.

The next time you log in, you must use your new password.

Account aggregation

By All Accounts (BAA) is an online account aggregation service. ServiceLogic provides access to your BAA accounts within ServiceLogic.

The BAA Single Sign On page provides a list of all your BAA accounts.

- To open the BAA Single Sign On page, click Accounts on the top navigation bar.
- To open a BAA account, click the name of the account under Display Name. Your BAA session opens in a new page within ServiceLogic.

Your ServiceLogic administrator can set up one or more BAA accounts for you with ServiceLogic. ServiceLogic securely stores your BAA password, so once you have logged on to ServiceLogic, you can open your BAA accounts without logging in again ("Single Sign-On). If your ServiceLogic user account is not set up for BAA, you will not see any accounts listed on the BAA Single Sign On page.

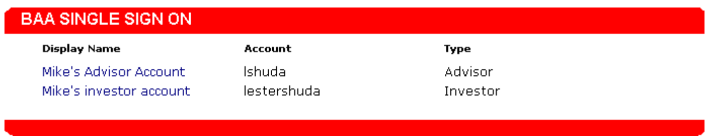


Figure 53. Account aggregation

Notifications on your Daily View page

When your tasks or documents are updated, ServiceLogic posts a notification on your Daily View page, and also emails a report of the notification to you. Notifications contain a link to the task or document. (Figure 54).

For example, the Task reminder notification reminds you that a task is coming due. You can click the link on the notification to go directly to the task, where you can review the task details and act on the task (see *Accept, decline, complete a task*).

Notification preferences

Your ServiceLogic preferences provide some options for notifications:

- You can choose which notifications you want to receive (see *Notification preferences*).
- You can choose to receive the emailed reports individually as they occur, or as a daily report containing all notifications for that day (see *Email preferences*)

Deleting notifications

Notifications continue to be displayed on your Daily View page until you delete them.

- To delete a notification from your Daily View page, select the checkbox next to the notification, then click Delete.

Notification templates

The wording of notifications can be changed by your ServiceLogic administrator (see the *ServiceLogic Authoring Guide*).

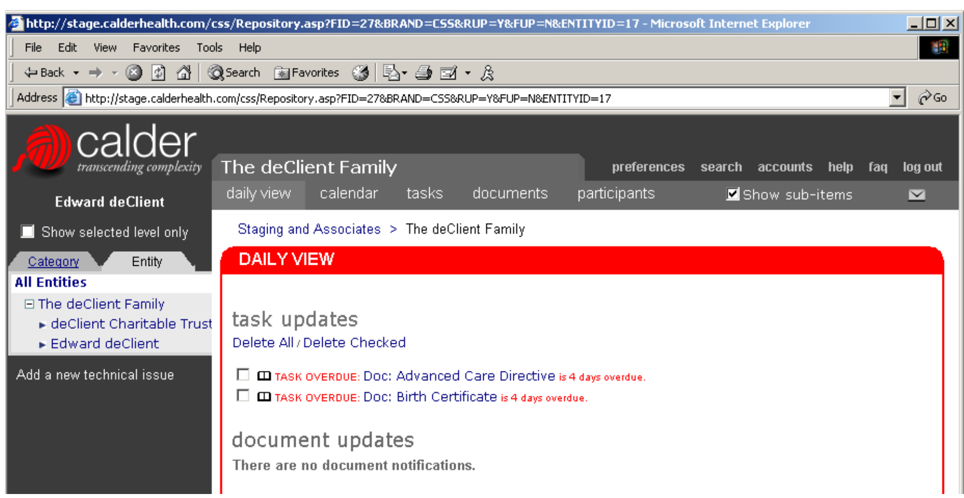


Figure 54. Notifications on your Daily View page

ServiceLogic notifications are described in *Table 3. Notifications*:

Task reminder	ServiceLogic posts this notification when the reminder time for a task occurs. Task reminders can optionally be set when you create a task. For example, a reminder might be set to occur one day before the task is due.
Task due	ServiceLogic posts this notification on the day a task is due, regardless of whether a reminder is set for the task. The exact time of this notification is determined by your ServiceLogic administrator.
Task x days overdue	After the initial Task due notification, ServiceLogic posts this notification each day the task is overdue. The exact time of this notification is determined by your ServiceLogic administrator.
Task accepted	ServiceLogic posts this notification when a task is accepted (see *Accept, decline, complete a task*).
Task declined	ServiceLogic posts this notification when a task is declined (see *Accept, decline, complete a task*).
Task complete	ServiceLogic posts this notification when a task is marked Completed (see *Accept, decline, complete a task*).
Document added	ServiceLogic posts this notification when a new document is added to an entity. The notification is posted on the Daily View page of all participants in the entity.
Document deleted	ServiceLogic posts this notification when a new document is deleted from an entity. The notification is posted on the Daily View page of all participants in the entity.

Table 3. Notifications

Notices in your email

When an administrator or other ServiceLogic user performs an action that involves you, he or she may optionally send you an email with details of the action. For example, if you are assigned to a task, you may receive an emailed notice containing a link to the task.

Other email notices are automatically sent by ServiceLogic.

Automatic email notices

ServiceLogic sends you emailed reports of your notifications and reminders. By All Accounts (BAA) is an online account aggregation service. ServiceLogic provides access to your BAA accounts within ServiceLogic.

The BAA Single Sign On page provides a list of all your BAA accounts.

- To open the BAA Single Sign On page, click Accounts on the top navigation bar.
- To open a BAA account, click the name of the account under Display Name. Your BAA session opens in a new page within ServiceLogic.

Your ServiceLogic administrator can set up one or more BAA accounts for you with ServiceLogic. ServiceLogic securely stores your BAA password, so once you have logged on to ServiceLogic, you can open your BAA accounts without logging in again ("Single Sign-On). If your ServiceLogic user account is not set up for BAA, you will not see any accounts listed on the BAA Single Sign On page.

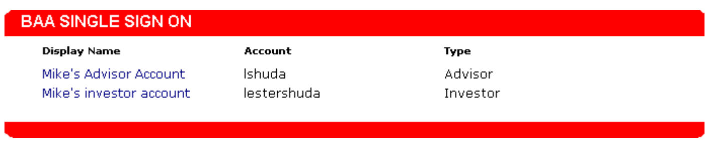


Figure 51. Account aggregation

Notifications on your).

There are three different types of emailed reports:

- **Batch notification.** Contains a report listing all your current notifications.
- **Single notification.** Contains a single notification.
- **Reminder email.** Contains a single task reminder.

Optional email notices

When you perform certain actions involving a participant, ServiceLogic allows you to send an email to the participant with details of the action.

For example, when you assign a participant to a task you can choose to send or not send an emailed notice to the participant. However, the task is still assigned, even if you do not send the email.

The wording of the emails is determined by the template for the email. However, you can add or delete more information before you send the emails.

Templates can be changed by a ServiceLogic administrator (see the *ServiceLogic Authoring Guide*).

Invitation to join repository	Informs you that you have been added to a service site and you now have access to it. The notice should provide a link to the service site. When you add a participant to a service site, you may optionally send this email to the participant (see *Add participant to a service site*).
Invitation to join entity	Informs you that you have been added to an entity and you now have access to the entity. The notice should provide a link to the entity. When you add a participant to an entity, you may optionally send this email to the participant. (see *Add a participant to an* entity).
Invitation to join project	Informs you that you have been added to a project and you now have access to the project. The notice should provide a link to the project. When you add a participant to an project, you may optionally send this email to the participant. (see *Add a participant to an* entity).
Task assignment	Informs you that a task has been assigned to you. The notice should contain a link to the task. You may open the task and accept it, decline it, or mark it complete (see *Accept, decline, complete a task*). When you assign a participant to a task, you may optionally send this email to the participant.
Reset password	Informs you that your password has been reset.
Task declined	Informs you that the responsible party has declined the task (see *Accept, decline, complete a task*). The notice should contain a link to the task. When you decline a task, you may optionally send this email to the person who assigned the task to you.

Archive email address

You may add an 'archive email address' to your service site configuration. All emails sent by ServiceLogic are copied (BCC) to your archive email address. You may store these emails in a location of your choice to meet your security and regulatory requirements.

No archive address is configured for your site unless you request it. The archive email address can be configured by your Calder representative when your site is initially created. To change the archive address at any time, contact Calder Support at support@caldersystems.com.

System requirements

Browser

ServiceLogic requires Microsoft Internet Explorer (Internet Explorer 6 Service Pack 1 or higher).

Browser plug-in

The document page requires a third-party browser plug-in (an ActiveX control) to upload documents.

If you don't have this plugin already installed, the first time you open the Upload Document page you are prompted to install it. Internet Explorer downloads the control from a Calder Systems server and installs it automatically.

The ActiveX control is the SA-XFile UI Module from SoftArtisans, Inc. (http://www.softartisans.com).