Administrator and Author guide for

ServiceLogic

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transcending complexity

Contents

Authoring site

About the Authoring site

The Authoring site provides forms for creating and managing entity templates. An entity template is a set of individual (but related) templates that define how each component of an entity is created.

When you use the Entity Wizard to create new entities in ServiceLogic, each component of the new entity is created based on templates defined in the Authoring site.

The templates are described in Table 1 (below):

Template	**Contains / Belongs to**	**Description**
Category	Contains one or more Type templates.	A high-level description of the nature of the entity (Corporation, Person, Qualified Plan, etc.).
Type	Belongs to a Category template. Contains Role, Task, and Folder templates.	A further definition linked to a specific category. For example, the Corporation category might contain separate templates for an S-Corporation, a C-Corporation, or other type of corporation.
Role	Belongs to a Type template.	A role required for the entity type. When you create an entity, ServiceLogic prompts you to assign participants to each role.
Task	Belongs to a Type template.	A task recommended for the entity type. When you create an entity, ServiceLogic prompts you to include the task in the new entity.
Document	Belongs to a Type template.	A document recommended for the entity type. When you create an entity, ServiceLogic prompts you to include the document in the entity. The document template can optionally associate a task with the document, so that when you include the document, a 'document request task' is created to assign responsibility for obtaining the document.
Folder	Belongs to a Type template.	An empty folder which will be included in any entities created with that Type template. You can set up your templates with a structure of folders to contain documents that you add later.

Table 1. Entity templates

How to open the Authoring site

In the ServiceLogic navigation pane, click Authoring. The authoring site opens.

To open the authoring site, you must have a permission level of Author (*see User permissions* in the *User Guide for ServiceLogic*). If you are not an Author, the Authoring link is not available on your navigation pane.

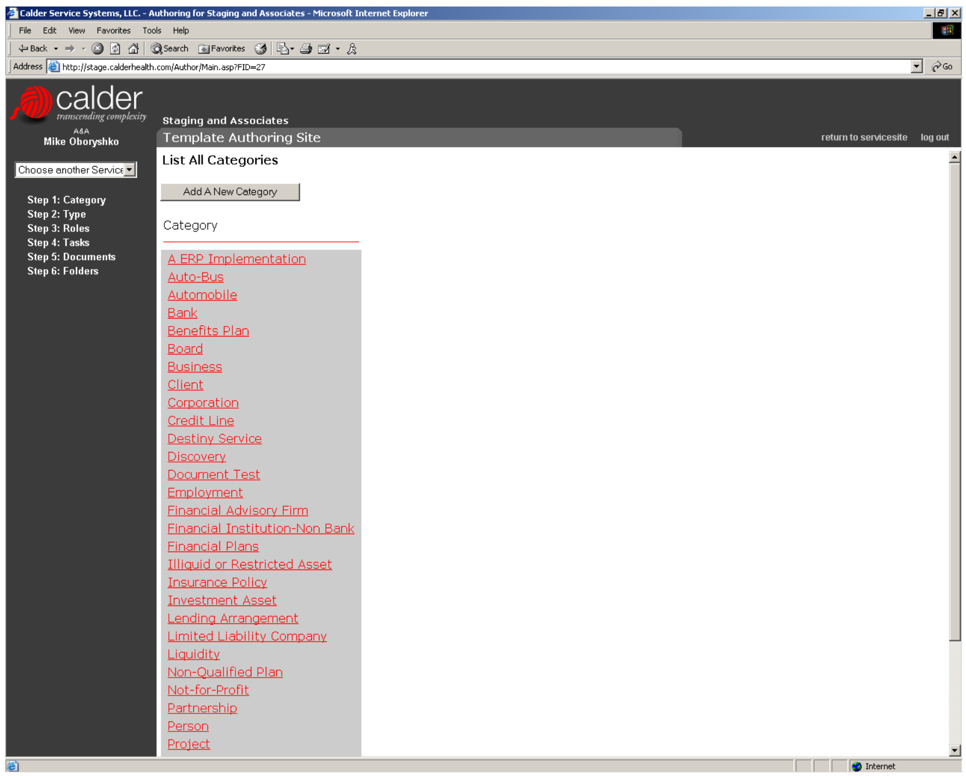

Figure 1. Authoring site

Entity templates

Category template

Create or update a Category template

1. Under Create Template, click Step 1: Category. The Categories list opens.

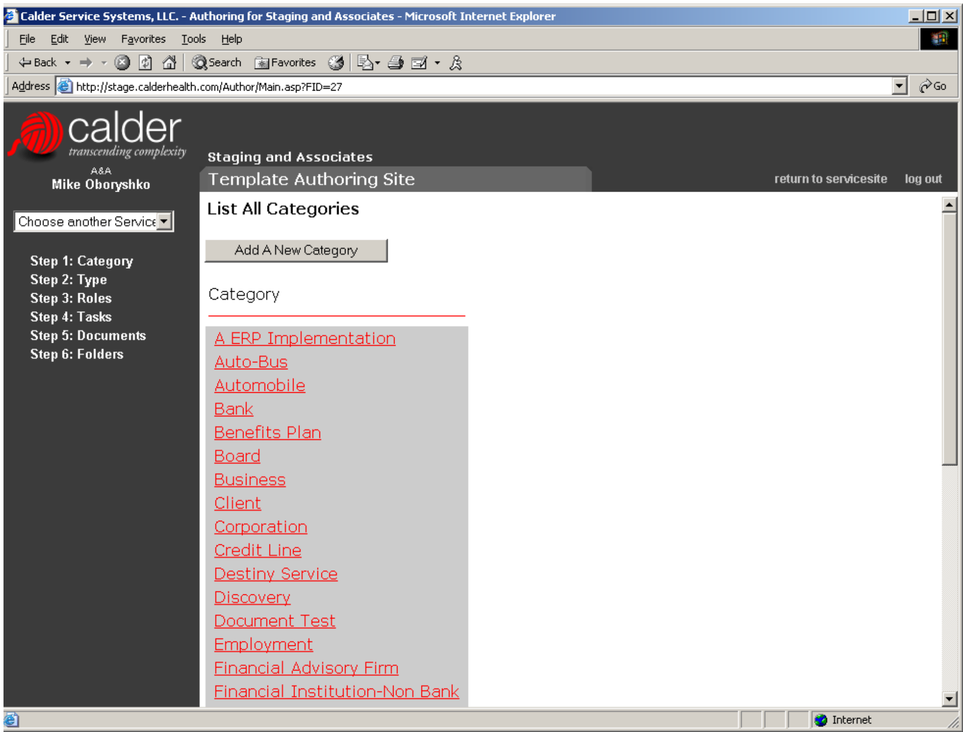

Figure 2. Categories list

2. Click the Category you want to edit, or click Add A New Category. The Category Information form opens.
3. In the Category box, enter the name of the category you want to create or update.
4. To finish, click the Add New Category Now button (or if you are updating an existing category, click the Commit Changes Now button).

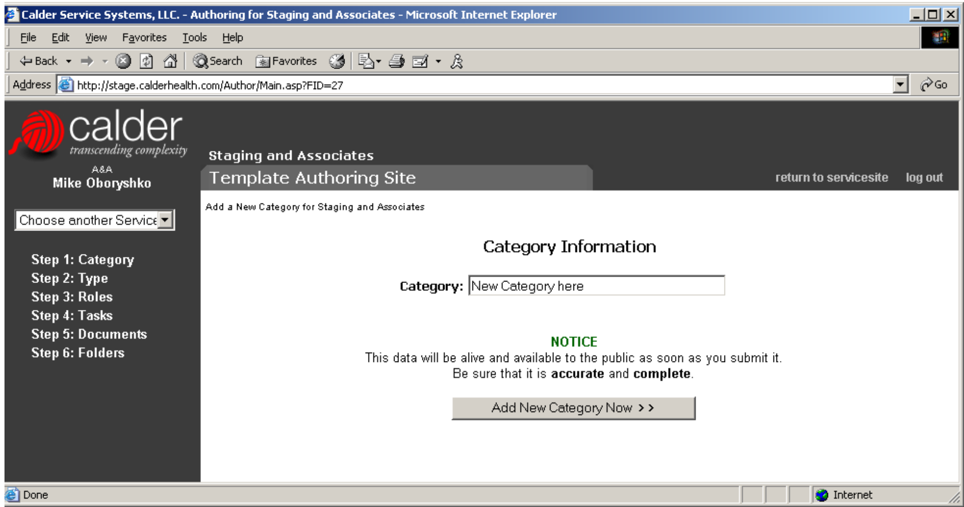

Figure 3. Category Information form

Type template

Create or update a Type template

1. Under Create Template, click Step 2: Type. The Types list opens.

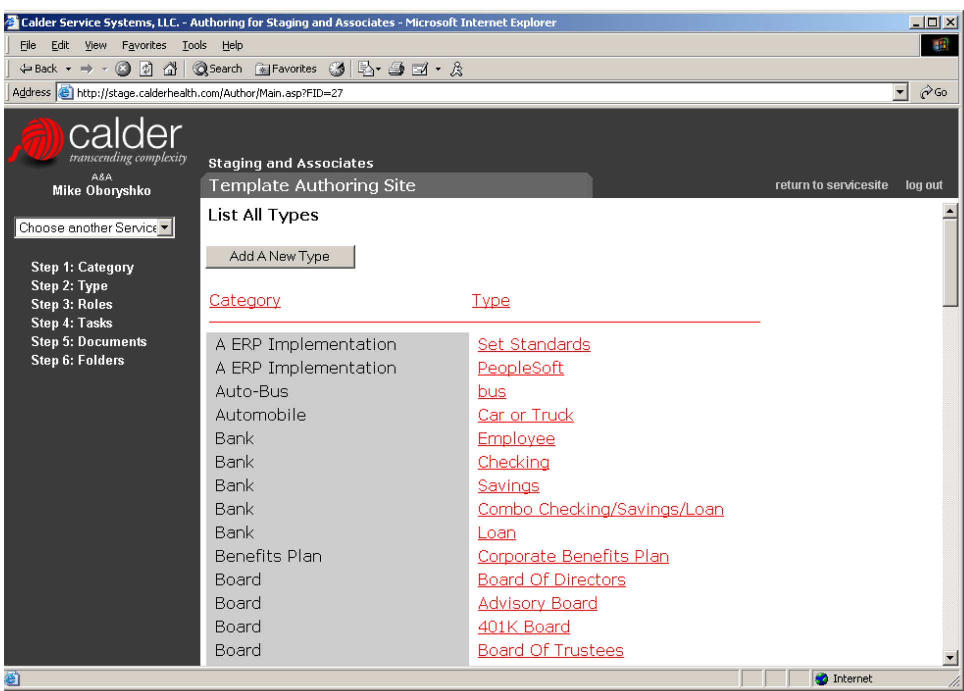

Figure 4. Types list

2. Click the Type you want to edit (or click Add A New Type). The Type Information form opens.
3. In the Category box, select the name of the category the type belongs to.
   - When you create a new entity with ServiceLogic, the entity wizard allows you to choose only types that belong to the category. For example, if you start to create a Corporation entity, you may choose a type of S-Corp, C-Corp, or some other type of corporation belonging to the Corporation template.
4. In the Type box, enter the name of the type you want to create or update.
5. To finish, click the Add New Type Now button (or if you are updating an existing type, click the Commit Changes Now button).

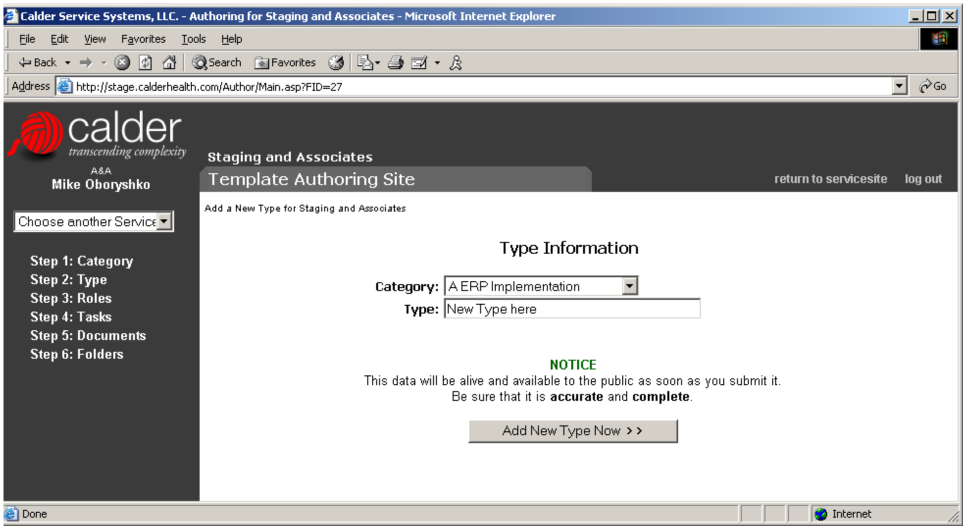

Figure 5 . Type Information form

Role template

Create or update a Role template

1. Under Create Template, click Step 3: Roles. The Types for Roles list opens.
2. In the Types for Roles list, click the type the role belongs to. The Roles list opens.
   - When you create a new entity with ServiceLogic, the entity wizard allows you to choose only roles that belong to the type. For example, if you start to create an S-Corporation, ServiceLogic prompts you to add the roles belonging to the S-Corp template.

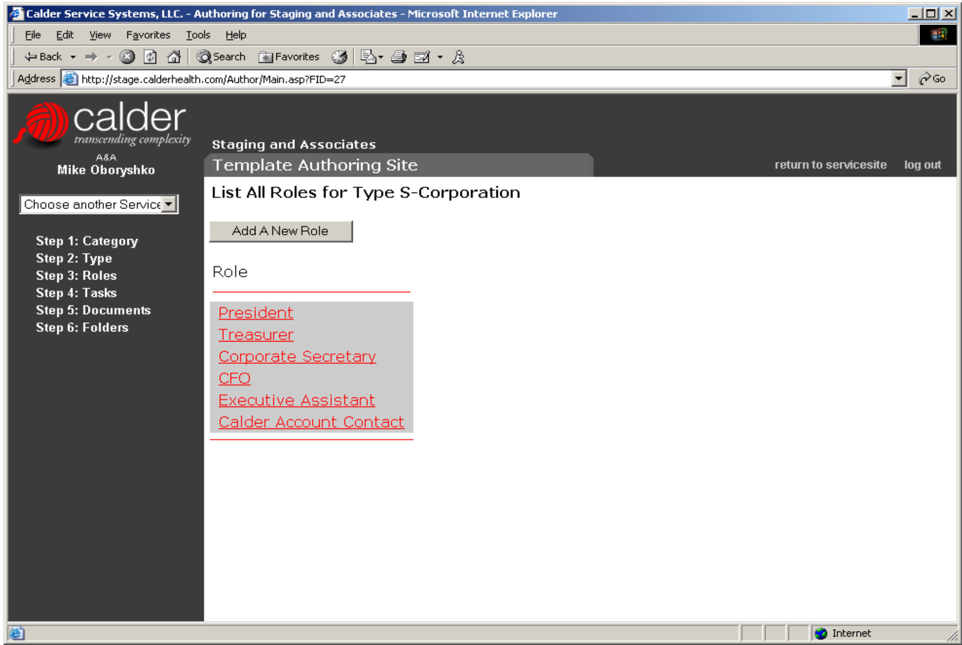

Figure 6. Roles list

3. In the Roles list, click the role you want to edit (or click Add A New Role). The Role Information form opens.
4. In the Role box, enter the name of the role you want to create or update.
5. To finish, click the Add New Role Now button (or if you are updating an existing role, click the Commit Changes Now button).

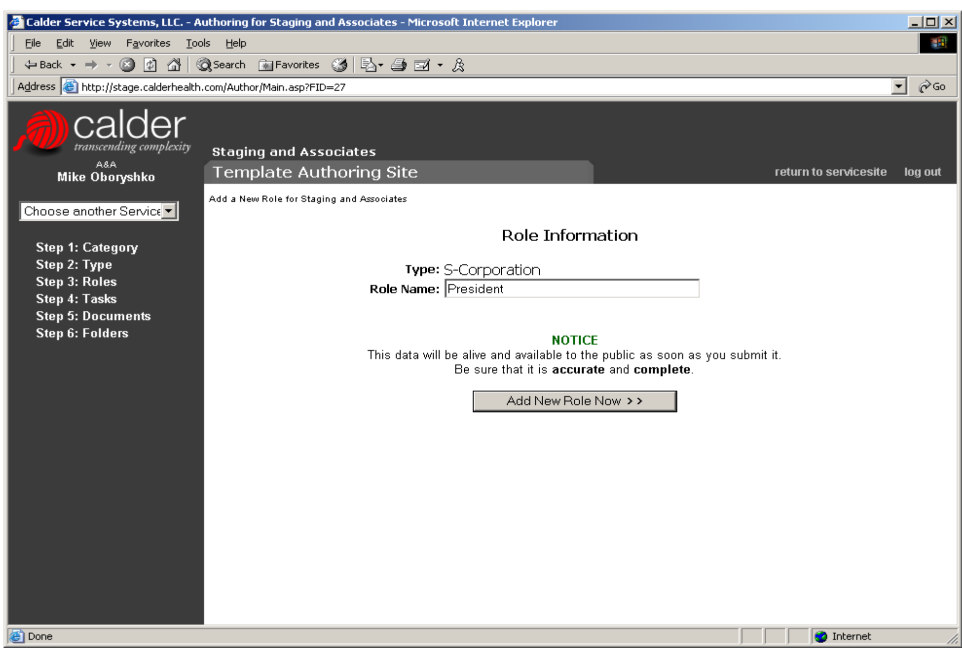

Figure 7. Roles list

Task template

Create or update a Task template

1. Under Create Template, click Step 4: Tasks. The Types for Tasks list opens.
2. In the Types for Tasks list, click the type the task belongs to. The Tasks list opens.
   - When you create a new entity with ServiceLogic, the entity wizard allows you to choose only tasks that belong to the type. For example, if you start to create an S-Corporation, ServiceLogic prompts you to add the tasks belonging to the S-Corp template.

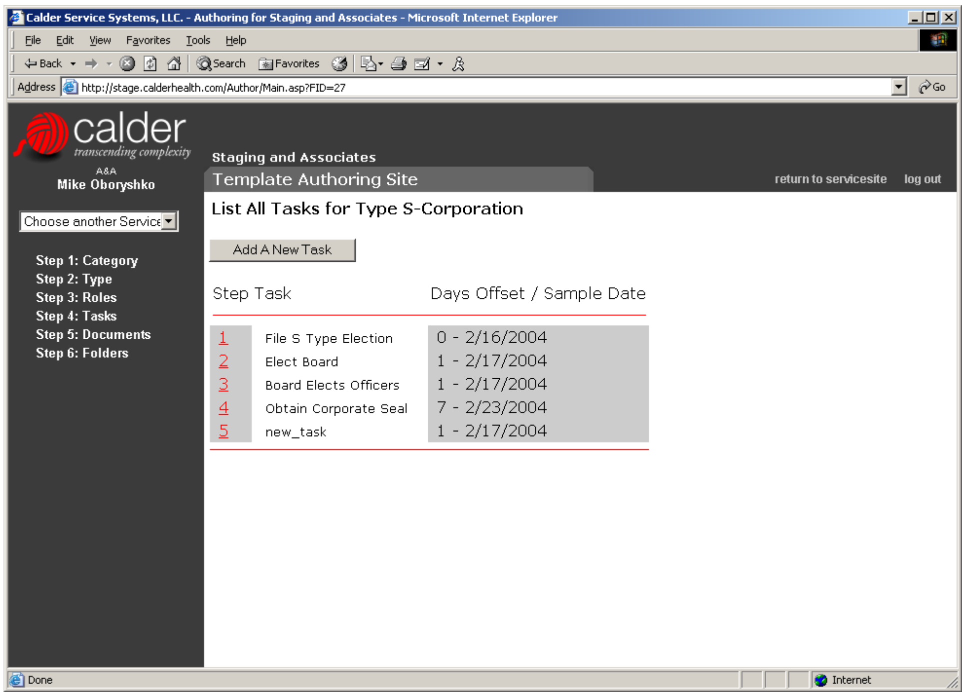

Figure 8. Tasks list

3. In the Tasks list, click the task you want to edit (or click Add A New Task). The Task Information form opens.
4. In the Task box, enter the name of the task you want to create or update.
5. In the Step box, enter the step number of the task. The step number determines the order of tasks displayed in the Entity Wizard.
6. In the Days Offset box, enter when the task should start (how many days after the start date).
   - For more information, see *How Steps and Task Sequences are used in entities*.
7. To finish, click the Add New Task Now button (or if you are updating an existing task, click the Commit Changes Now button).

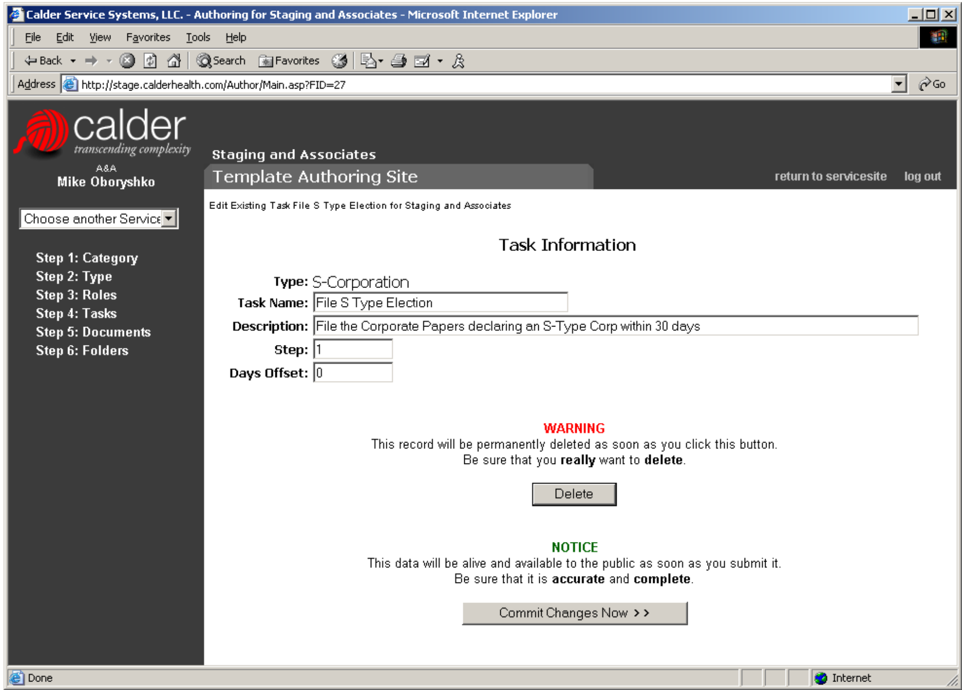

Figure 9. Task Information form

How Steps and Task Sequences are used in entities

When you create an entity, ServiceLogic displays the tasks in the order determined by the step numbers in the task template.

The task due dates are calculated based on the Days Offset in the task template (days after the start date). The start date can be adjusted when you create the entity, or the due dates can be adjusted later by editing the tasks individually.

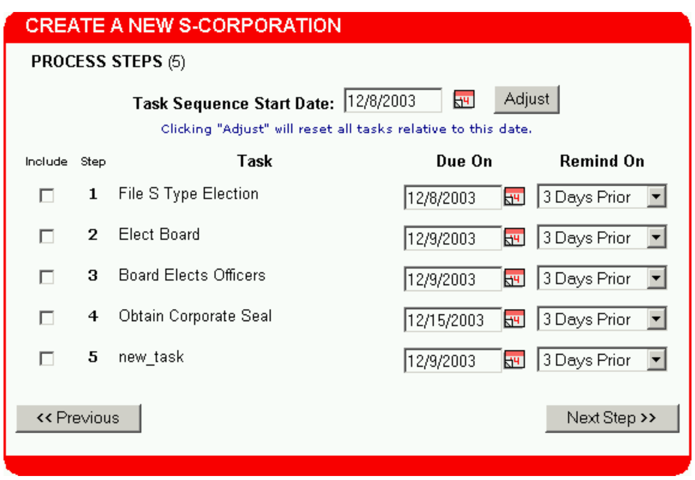

Figure 10. Entity Wizard

Document template

Create or update a Document template

1. Under Create Template, click Step 5: Documents. The Types for Documents list opens.
2. In the Types for Documents list, click the type the document belongs to. The Documents list opens.
    - When you create a new entity with ServiceLogic, the entity wizard allows you to choose only documents that belong to the type. For example, if you start to create an S-Corporation, ServiceLogic prompts you to add the documents that belong to that type.

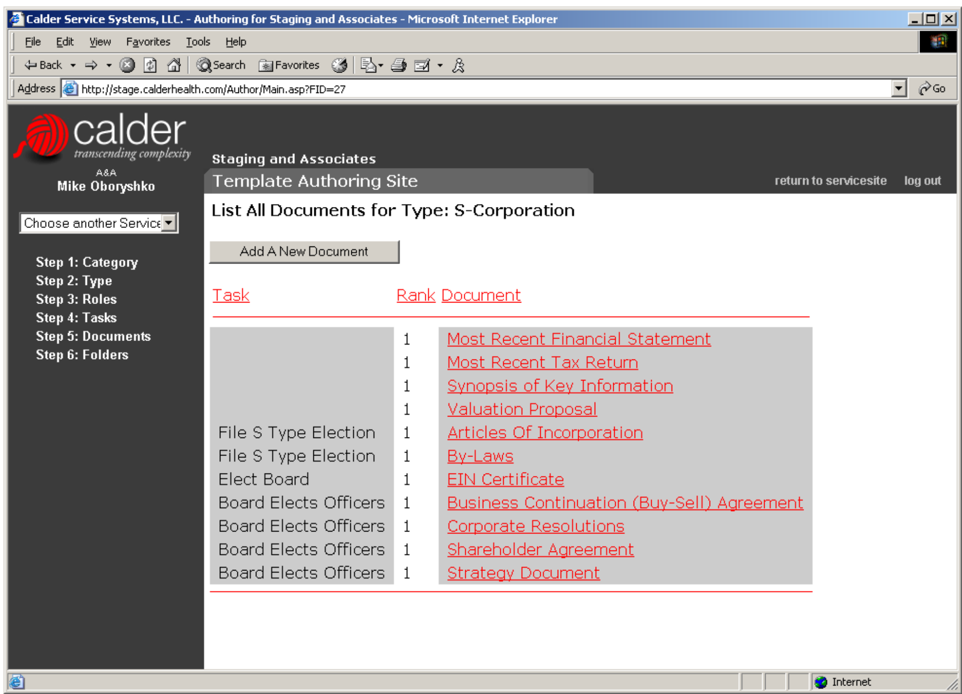

Figure 11. Documents list

3. In the Documents list, click the document you want to edit (or click Add A New Document). The Document Information form opens.
4. In the Name box, enter the name of the document you want to create or update.
5. In the Related Task list, select the name of the task you want to associate with this document. If you don't want to associate a task, choose 'Unassigned.'
    - If a document has a related task, when you include that task in an entity ServiceLogic prompts you to create a new Document Request Task that represents the task of obtaining the required document. Just like other tasks, you can schedule a due date, assign a Responsible Party, and set reminders for Document Request Tasks.
6. In the Rank box, enter a rank for the document. The rank number determines the order of Document Request tasks displayed in the Entity Wizard.

7. To finish, click the Add New Document Now button (or if you are updating an existing document, click the Commit Changes Now button).

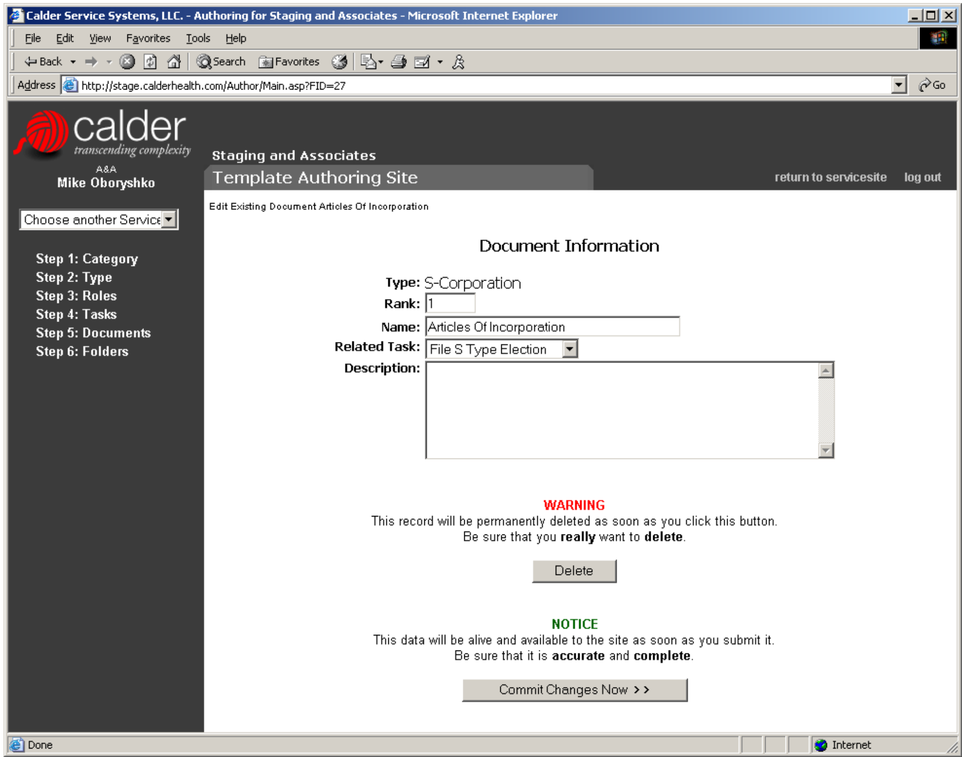

Figure 12. Document Information form

Folder template

Create or update a Folder template

1. Under Create Template, click Step 6: Folders. The Types for Folders list opens.
2. In the Types for Folders list, click the type the folder belongs to. The Folders list opens.

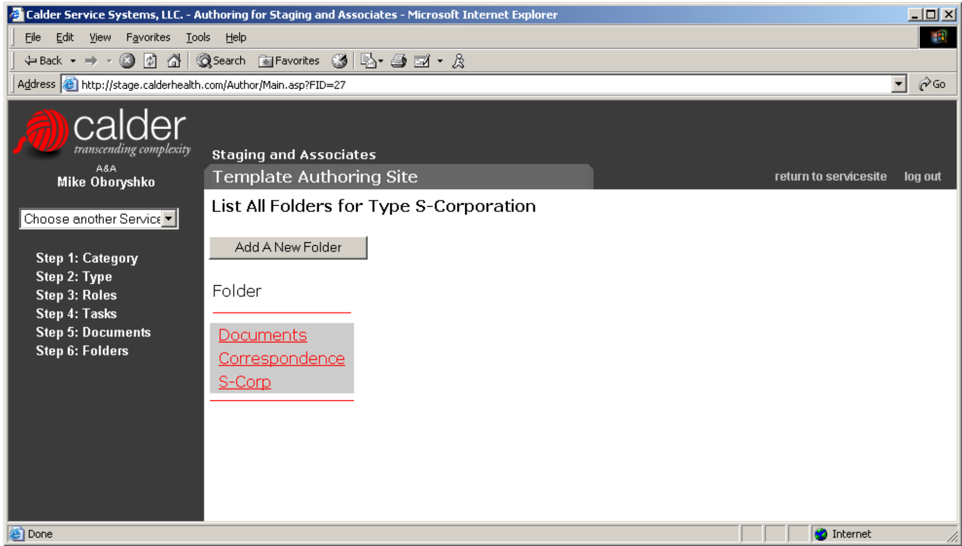

Figure 13. Folders list

3. In the Folders list, click the folder you want to edit (or click Add A New Folder). The Folder Information form opens.
4. In the Folder Name box, enter the name of the folder you want to create or update.
5. Next to Required, click Yes or No to indicate if the folder is required.
6. To finish, click the Add New Folder Now button (or if you are updating an existing folder, click the Commit Changes Now button).
   - Required folders cannot be deleted by users regardless of permission level.
   - If you create a required folder, or modify a folder to be required, the folder is added to all new and existing entities based on the template.
   - Required folders can only be deleted by removing them from the template. If you delete 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 you delete the folder from the template.

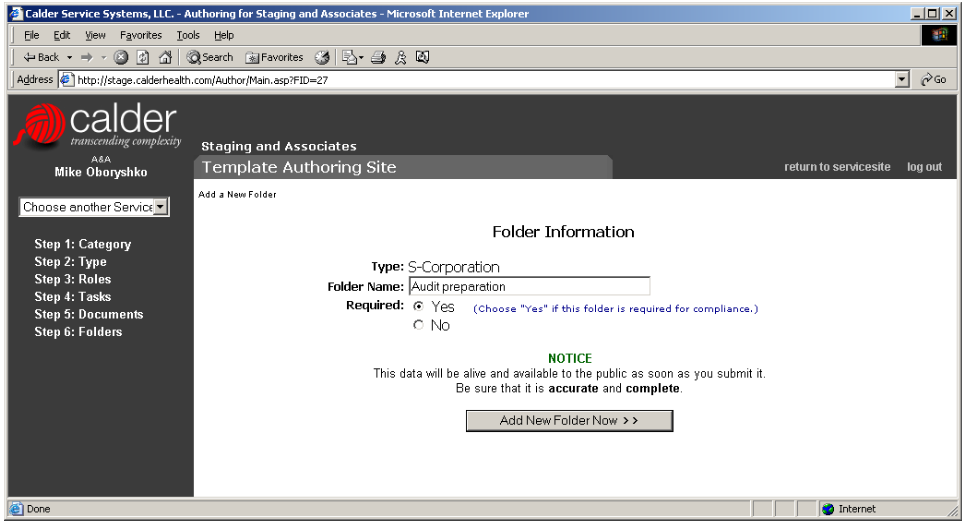

Figure 14. Folder Information form

Deleting entity templates

Deleting the entire category (Recursive Delete)

To delete a category and all templates associated with that category:

1. Open the Category Information form (click Step 1: Category, then click the category name).

2. Click Recursive Delete. The category is deleted, as well as all templates belonging to that category, including Types, Roles, Tasks, Documents, and Folders.

If there are no other templates belonging to the category, a Delete button appears instead of the Recursive Delete button.

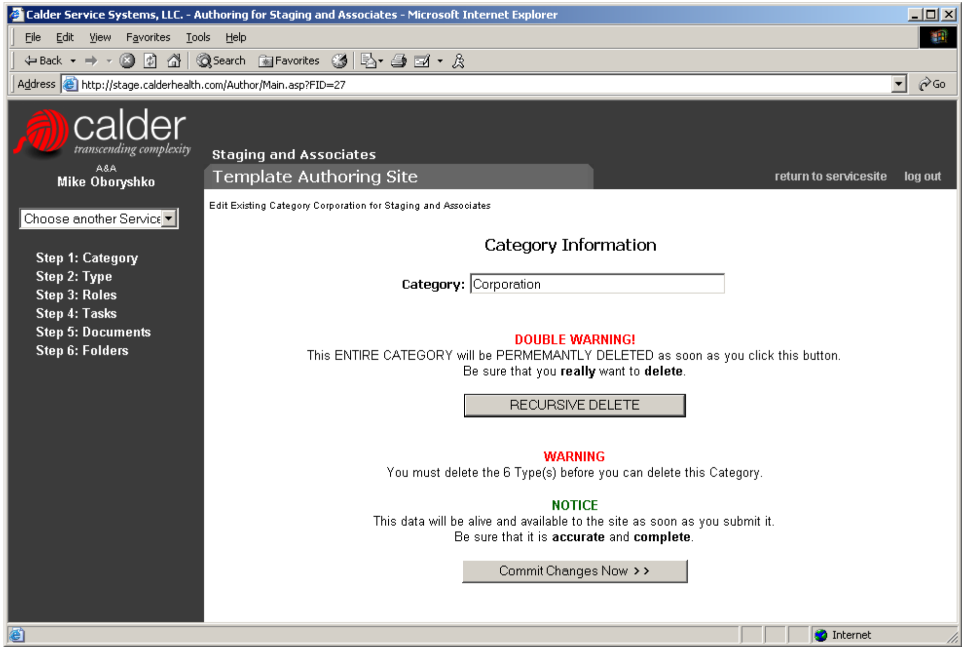

Figure 15. Deleting entity templates

Deleting an individual template

To delete a template (other than a category template), open the template's Information page, then click Delete.

You cannot delete a Category or Type template if there are other templates linked with it. In the example below, the Type Information screen displays a warning explaining that the linked templates must be deleted before the Type template can be deleted.

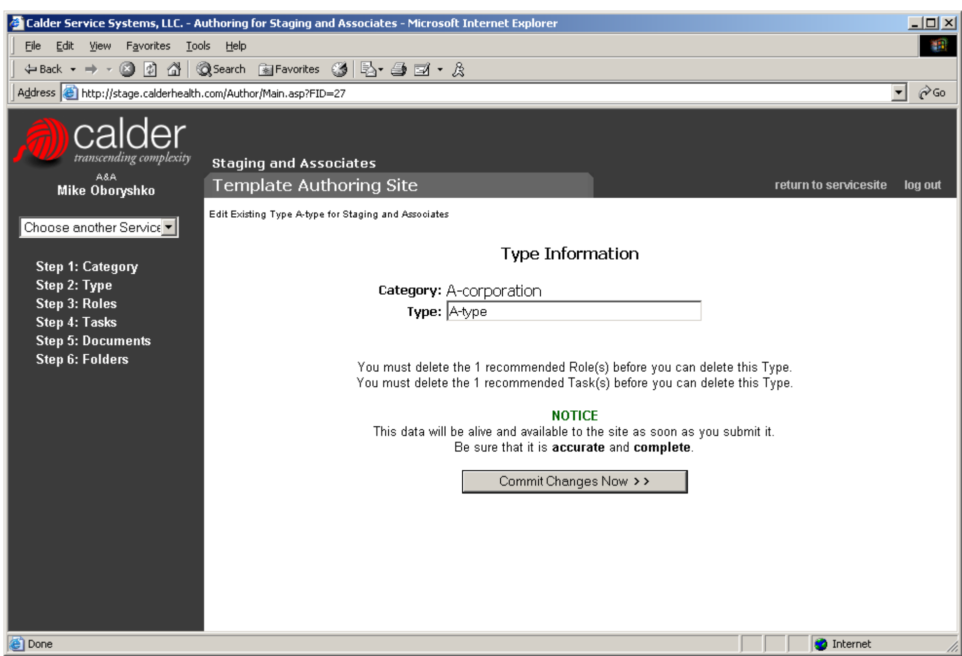

Figure 16. Deleting linked templates

Administrative site

About the Administrative site

The Administrative site provides forms for certain administrative functions in ServiceLogic, including:

- Tracking users - View and manage users' access to the service site. Disable users, reset passwords, view last page accessed, and more.
- Single sign-on - Set up current ServiceLogic users for access to account aggregation.
- Email/Notification templates - Modify templates for ServiceLogic standard emails and notifications.
- Countries/States - Add or remove countries and states used by ServiceLogic (currently used only for participant addresses).
- Change requests - View all technical issues submitted by users.
- Entity/Participant reports - View a list of who participates in which entity.

How to open the Administrative site

In the ServiceLogic navigation pane, click Administration. The Administrative site opens.

To open the Administrative site, you must have a permission level of Administrator (*see User permissions* in the *User Guide for ServiceLogic*). If you are not an Administrator, the Administration link is not available on your navigation pane.

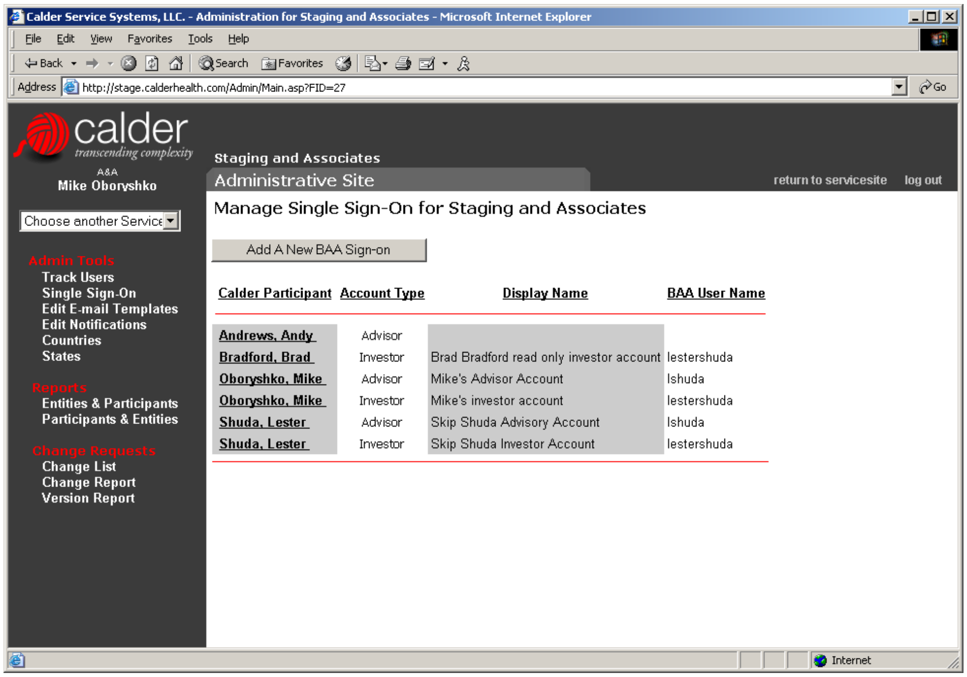

Figure 17. Administrative site

Track users

The Track Users page lists all participants in the service site, and provides administrative tools for managing the user's access to the service site.

To add a new participant, see *Add a participant to a service site* in the *User Guide for ServiceLogic*.

New participants are created with a status of Granted, and a permission level of Reader.

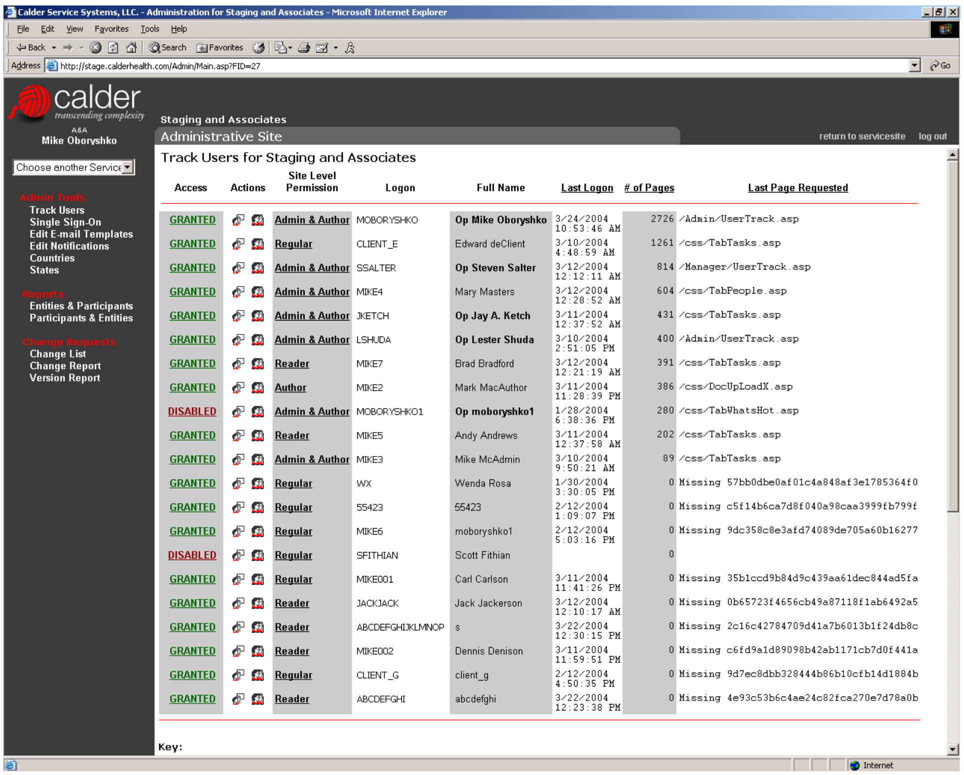

Figure 18. Track Users form

Access (Granted or Disabled)

Access can be either "Granted" or "Disabled" for the current service site.

- If the access is Granted, the user can access this service site.
- If the access is Disabled, the user cannot access this service site. However, a user who is Disabled for one service site can still log in and access other service sites.

To change the user's access to Disabled, click Granted.

To change the user's access to Granted, click Disabled.

Actions (Invite user, reset password)

Under Actions, there are two icons:

Invite. Click Invite to optionally send an email to the user advising that he or she is a participant in the service site. site. The email includes a link to the site. You can invite a user even if the user is already a participant.

Reset password. Click Reset Password to change the user's password to a new password. The new password is previewed in an email message. You may choose to send or not send the email to the user.

Site-level permission

The user's current permission is listed under Site Level Permission. To change the permission, click the current permission to open a form for selecting permissions. The permissions are:

- Author
- Regular (regular user)
- Reader

Administrators cannot create other administrators. If you need to give someone Administrator permission, contact Calder Support at support@caldersystems.com.

For details, see *User permissions* in the *User Guide for ServiceLogic*.

User tracking

The remaining columns on the Track User form provide details about events for each user, including:

- **Logon**. The login name the user uses to log into Service Logic.
- **Full Name**. The user's full name, as entered in Preferences.
- **Last Logon**. The date the user last logged into the service site.
- **# of Pages**. The total number of pages the user has viewed on this service site.
- **Last Page Requested**. The name of the page the user has most recently accessed.

Single sign-on

The Single Sign-on page lists all the ServiceLogic users who are set up to use By All Accounts (BAA). Each user's entry in the Single Sign-on page contains login information (username and password) required to log into a BAA account.

- To use Single Sign On, you must have an existing BAA account. ServiceLogic does not create a BAA account; it only logs you on to your existing BAA account.

When your BAA username and password are correctly set up via the Single Sign-on page, you can open BAA from within ServiceLogic without entering your BAA username or password. For details, see Account Aggregation in the *User Guide for ServiceLogic*.

- To open the Single Sign-on page, click Single Sign-on on the Administrative site.

Set up a Single Sign-on account (BAA)

To set up a new BAA account for a ServiceLogic user:

1. Click Single Sign-on on the Administrative site. The Add A New BAA Sign On form opens.
2. In the Participant list, select the participant.
3. In the Account Type box, select the BAA account type.
3. In the BAA User Name box, enter the user name for the participant's BAA account.
4. In the New Password box, enter the password for the participant's BAA account, then enter the same password in the Retype Password box.
    - Note. This step does not create a new password. You must enter the password assigned by BAA.

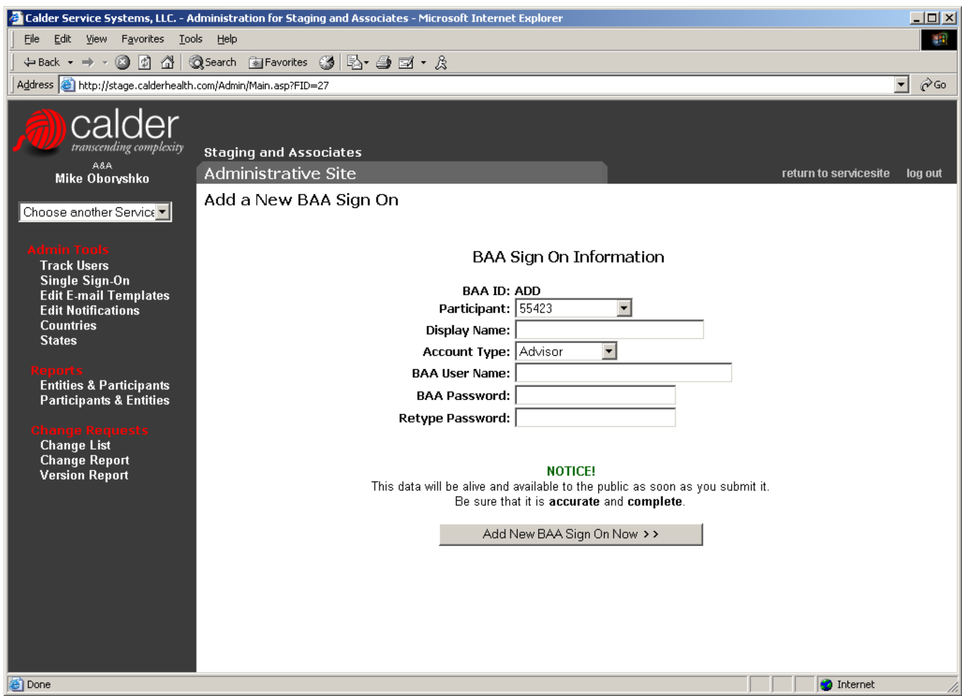

Figure 19. Add a new BAA sign-on form

Email templates

Email templates are templates for the email notices sent to participants (see the *Notices in your email* topic in the *User Guide for ServiceLogic).*

- To see all the available email templates, click Edit Email Templates (under Other Lists). The Email Template List opens.

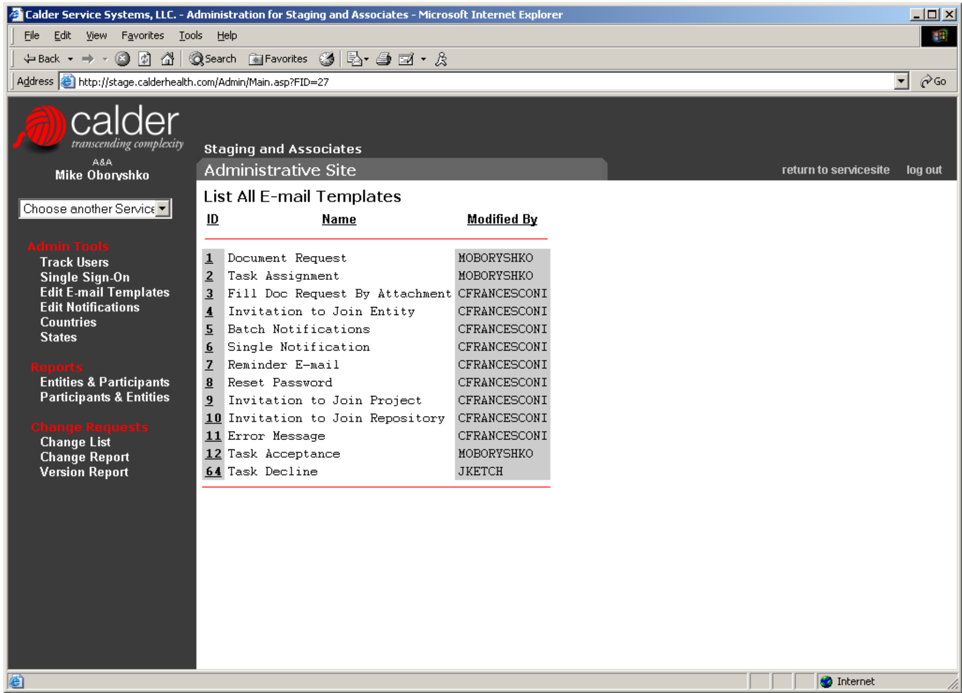

Figure 20. Email Templates list

Changing your email templates

You can edit the templates to deliver email notices that is customized for your service site.

- To edit an email template, click the ID number for the template on the Email Templates List. The Email Template Information form opens.

The Body section contains the template text, You can change or delete any of the text or add new text, and you can use the formatting tools available in the toolbar to format the text.

The bracketed words are reserved variables that insert variable text into the message or the subject line. For example, the [TASK] variable is replaced in the actual email by the name of the task, and the [FAMILY} variable is replaced in the email by the name of the service site.

A key describing all the variables is displayed on the Email Template Information form.

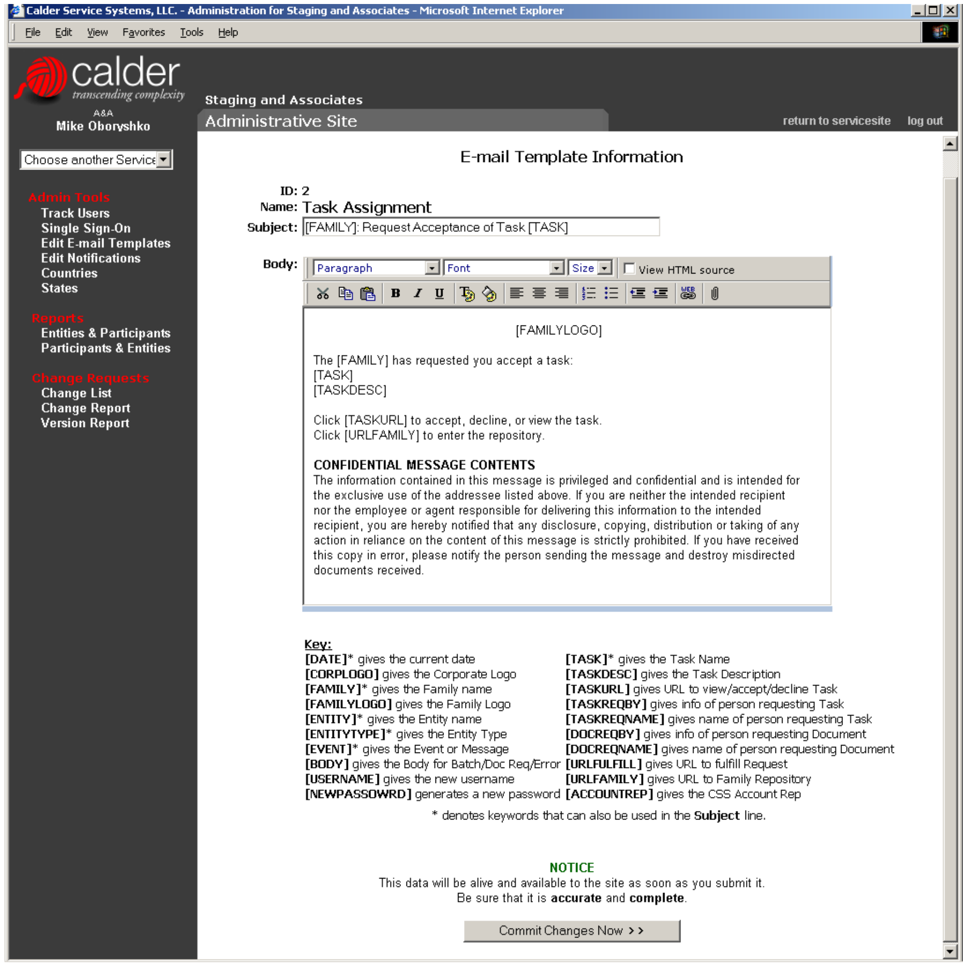

Figure 21. Email Template Information form

Notification templates

Notification templates are templates for the notifications displayed on participant's home pages, and included in emailed reports (see the *Notifications on your home page* topic in the *User Guide for ServiceLogic).*

- To see all the available notification templates, click Edit Notifications (under Other Lists). The Notification Template List opens.

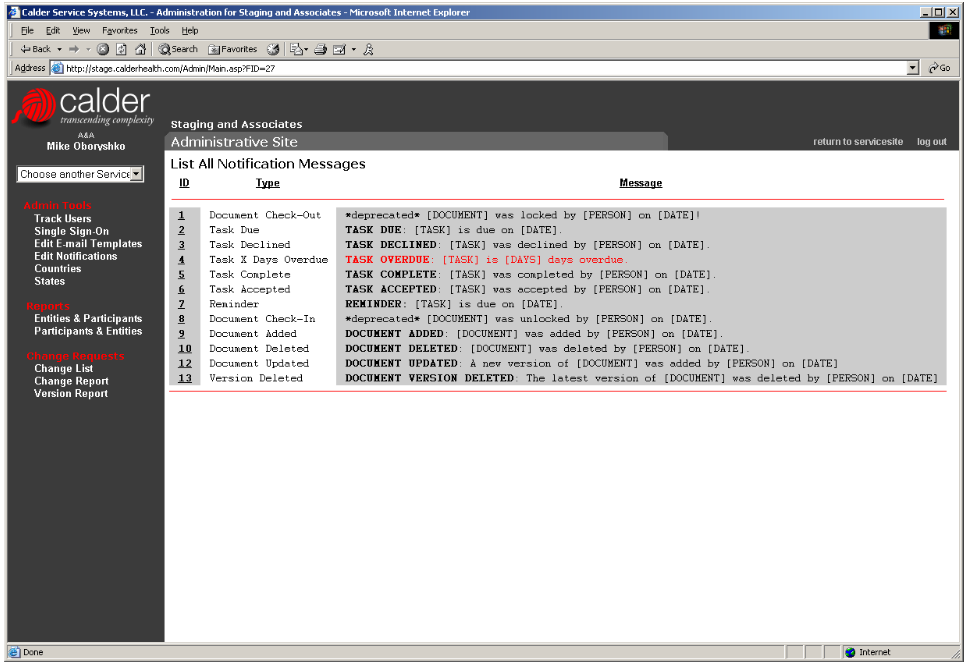

Figure 22. Notification Templates list

Changing your notification templates

You can edit each template to deliver notifications that are customized for your service site.

- To edit a notification template, click the ID number for the template on the Notification Templates List. The Notification Template Information form opens.

The Message section contains the template text. You can change or delete any of the text, or add new text.

The bracketed words are reserved variables that insert variable text into the message or the subject line. For example, the [TASK] variable is replaced in the actual email by the name of the task. A key describing all the variables is displayed on the Email Template Information form.

You can apply some simple formatting to the notification by entering HTML-style tags. For example, the following notification displays the entire line in red:

<FONT COLOR=RED>[TASK] is [DAYS] days overdue.</FONT>

and the following template applies bold text to the word 'REMINDER:'

<B>REMINDER:</B> [TASK] is due on [DATE].

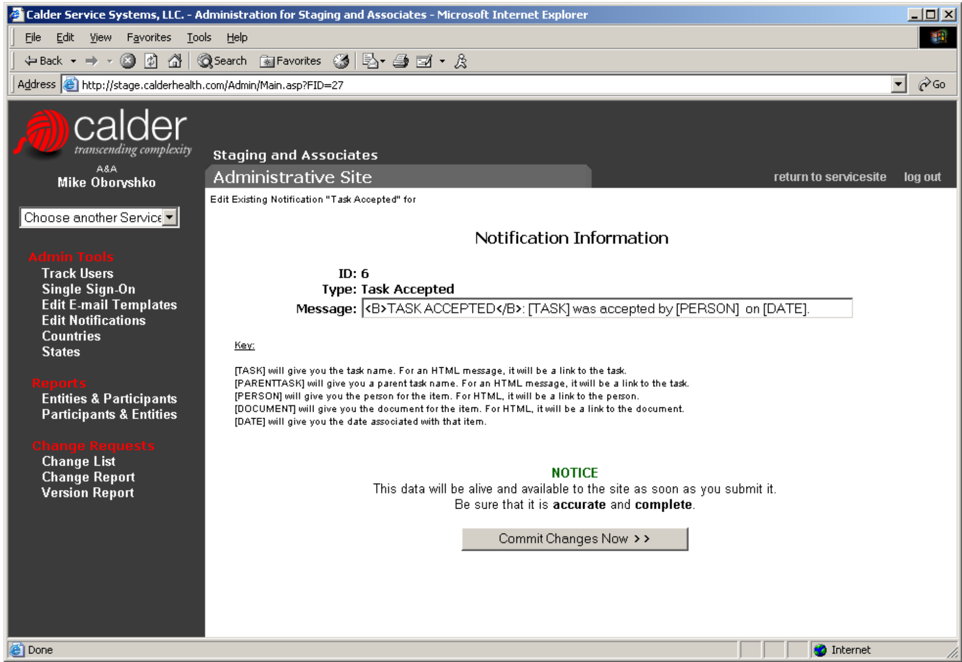

Figure 23. Notification Template Information form

Countries and states

Countries

ServiceLogic maintains a list of countries and their ISO country codes. Each participant's address in his or her user profile is required to include the country (see *Preferences* in the U*ser Guide for ServiceLogic*).

When you edit your preferences, or update a participant profile, you are required to choose a country from a list. If you don't see the country you need in the list, or if you need to update the ISO codes or the country name, you can add it or update it on the authoring site.

- To open the Countries list, click Countries (under Other Lists).
- The Countries list displays approximately 130 countries at a time. To see more countries, click the arrow buttons.
- To update a country, click the name of the country, or to add a new country, click Add A New Country. The Country Information form opens.

States

ServiceLogic maintains a list of the US states and their 2-character postal abbreviations. If a participant's address is in the United States, the state must also be identified in the participant's user preferences.

- To open the States list, click States (under Other Lists).

Reports

ServiceLogic provides two administrative reports that help provide an overview of how resources are structured and distributed.

To open these reports, click the name of the report (under Reports).

- Entities and Participants. For each entity, lists all the participants belonging to the entity.
- Participants and Entities. For each participant, lists all the entities the participant belongs to.

Change requests

The Change List shows all the technical issues (Change Requests) submitted by users.

- To open the Change List, click Change List on the navigation pane.