

## Critical Power Solutions -- Customer Portal

This job aid is written for users who enter *Critical Power Solutions* through the *Customer Portal*. Users have access to *Customer Portal* if:

- they were set up as a company administrator by a Home Office Customer Service Representative (CSR) with access to all sites and strings of their company only.
- they were set up as an external site user by their company administrator with access to the folders, sites and strings selected by the administrator at setup.

These two types of users have slightly different views of the site. The following job aid discusses the view for both roles. *Customer Portal* users can only view data associated with their company.

### Logging In

As a user of *Customer Portal*, you received a URL and password. Following are step-by-step instructions about how to log in.

- 1 Open an Internet browser and enter the URL to display the *Customer Portal Login* screen.

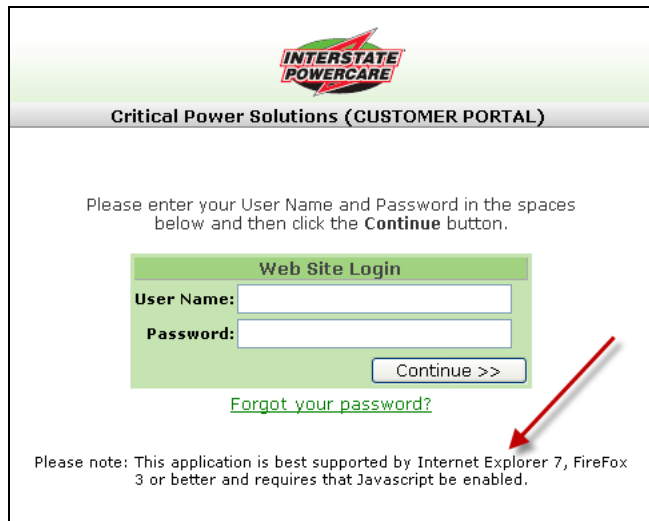


Figure 1. Customer Portal Login Screen

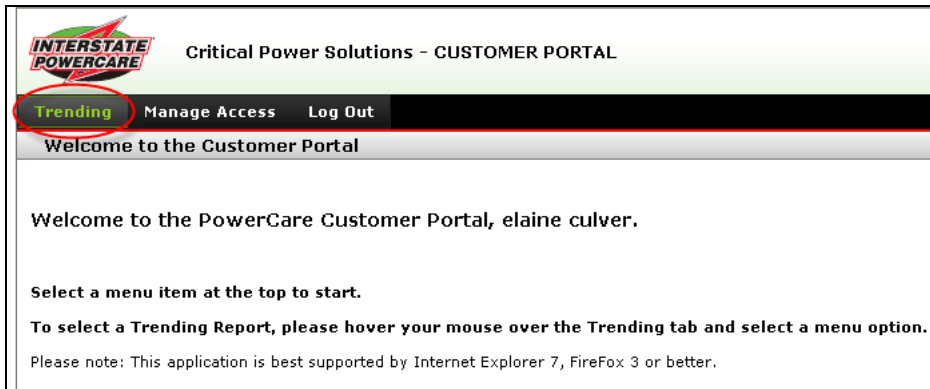


**Note:** Internet Explorer 7 or FireFox 3 or better is recommended. Javascript must be enabled.

- 2 Enter the user name and password in the *User Name:* and *Password:* fields.

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3 Click  to display the *Customer Portal Welcome* screen.



**Figure 2. Customer Portal Welcome Screen**

The following information is organized by the first two tabs on the black toolbar at the top of the screen.

- **Trending**
- **Manage Access**

## Trending

The first tab on the toolbar is the **Trending** tab.

There are three trending reports available.

- Deviation from Avg Trend
- Percentage Change Trend
- Base Value Trend

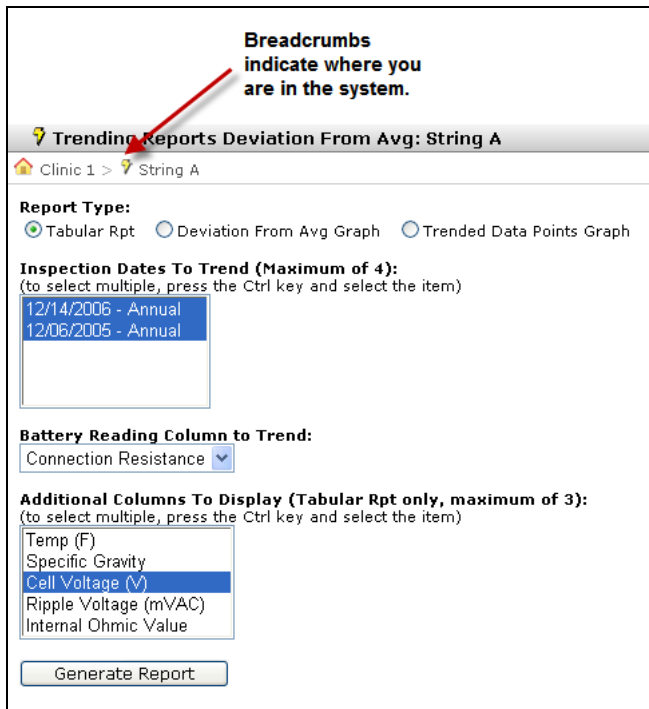
All three reports are generated by using the same setup screen.

- 1 Click the **Trending** tab on the top toolbar.
- 2 Select a string from the left navigation pane to display the *Trending* screen.



**Note:** Trending reports can only be run at the string level.

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**Figure 3. Trending Screen**

- 3 Use this screen to filter information for all three reports. Select the type of report you want (for example, tabular, graph or point graph).

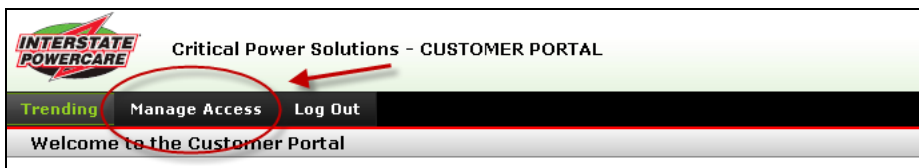


**Note:** If you are entering and selecting data for the Base Value Trend report, you need to enter a value in the *Base Value:* field. Failure to enter the value results in a **“Cannot continue”** error message and you are directed to enter a value before you can continue.

- 4 Continue to make selections to filter how the report will display.
- 5 Click  to generate the report.

## Manage Access

The second tab on the *Customer Portal Welcome* screen (Figure 2 on page 2) toolbar is the **Manage Access** tab.



**Figure 4. Manage Access Tab**

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As a site user, you can use this tab to change your password. If you are an administrator, you can change your password and manage the access of other users.

## Changing Your Password

Site users and administrators have the *Change Password* option under **Manage Access**.

- 1 Click **Manage Access** to display the *Change Your Password* option.

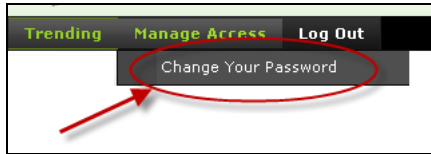


Figure 5. Change Your Password Option



**Note:** If you are an administrator, two options display under the **Manage Access** tab. The *Accounts Administration* option is discussed in the following section.

- 2 Click **Change Your Password** to display the *Change Your Password* screen.

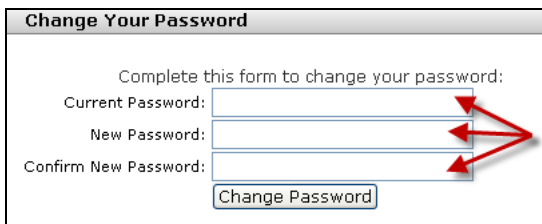
A screenshot of the 'Change Your Password' form. The form has a title bar that says 'Change Your Password'. Below the title bar, there is a heading: 'Complete this form to change your password:'. There are three input fields: 'Current Password:', 'New Password:', and 'Confirm New Password:'. Each field has a red arrow pointing to it. At the bottom of the form, there is a 'Change Password' button.

Figure 6. Change Your Password Screen

- 3 Enter your current password in the *Current Password:* field.
- 4 Enter your new password in the *New Password:* field and re-enter the new password in the *Confirm New Password:* field.
- 5 Click  to change the password. A confirmation message displays briefly on the screen.

## Managing Users

As an administrator, you can change site users' access information, in addition to adding new users to the system.

Click **Manage Access** to display the *Accounts Administration* option.

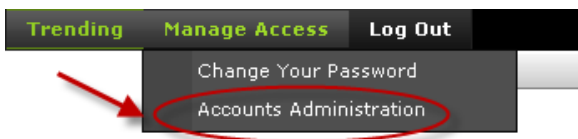
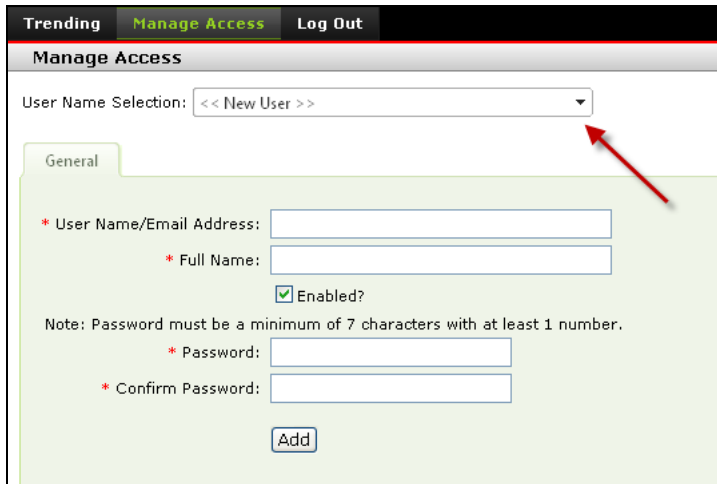


Figure 7. Accounts Administration Option

Use this option to change the access of a site user or add a new user to *Customer Portal*.

## Managing Site Users

- 1 Click **Manage Access>Accounts Administration** to display the *Manage Access* screen.



The screenshot shows the 'Manage Access' interface. At the top, there are navigation tabs: 'Trending', 'Manage Access' (highlighted), and 'Log Out'. Below the navigation is a 'Manage Access' header. A 'User Name Selection:' dropdown menu is set to '<< New User >>'. A red arrow points to this dropdown. Below the dropdown is a 'General' tab. The form contains the following fields: '\* User Name/Email Address:', '\* Full Name:', a checked 'Enabled?' checkbox, a note stating 'Note: Password must be a minimum of 7 characters with at least 1 number.', '\* Password:', and '\* Confirm Password:'. An 'Add' button is located at the bottom of the form.

**Figure 8. Manage Access Screen**

- 2 Select a user from the *User Name Selection:* drop-down list to display the user's current information on the **General** tab.



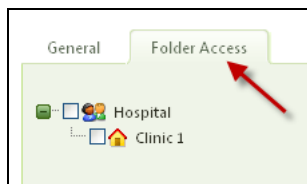
**Note:** When you select a user from the *User Name Selection:* drop-down list, two tabs display: **General** and **Folder Access**.



The screenshot shows the 'Manage Access' interface with the 'User Name Selection:' dropdown menu set to 'jculver'. A red arrow points to the dropdown with the label 'User is selected'. Below the dropdown are two tabs: 'General' and 'Folder Access'. Red arrows point to both tabs with the label 'Two tabs display'.

**Figure 9. General and Folder Tabs**

- 3 Make changes to the user's login name and/or password.
- 4 Click **Save** to save the changes.
- 5 Click the **Folder Access** tab to display the user's current system access.



The screenshot shows the 'Folder Access' tab. It displays a folder tree with two folders: 'Hospital' and 'Clinic 1'. A red arrow points to the 'Folder Access' tab.

**Figure 10. Folder Access Tab**

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6 Use this tab to change a user's system access. If you click the **Customer** check box, the user will have access to the Customer and everything below (all sites and strings). Click a specific site and the user will only have access to that site (and its strings).

7 Click  to save the **Folder Access** tab information.

### Adding a User

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1 Select <<**New User**>> from the *User Name Selection:* drop-down list to display a blank *Manage Access* screen (Figure 4 on page 3) .

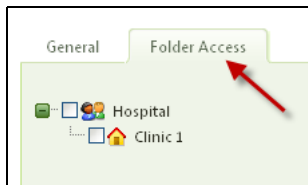
2 Enter a user id in the *User Name/Email Address:* field (user's email address is suggested). Enter the user's full name in the *Full Name:* field.

3 Verify the **Enabled?** check box is checked.

4 Enter a password in the *Password:* field, using a minimum of 7 characters and 1 number.

5 Re-enter the password in the *Verify Password:* field. The user will have the opportunity to change the password when they log into the system.

6 Click  to add the user to *Customer Portal* and display the *Folder Access* tab. The new user is now included in the *User Name Selection:* drop-down list.



**Figure 11. Folder Access Tab**

7 Use this tab to set up a new user's system access. If you click the **Customer** check box, the user will have access to the Customer and everything below (all sites and strings). Click a specific site and the user will only have access to that site (and its strings).

8 Click  to save the **Folder Access** tab information.

### Disabling a User's Access

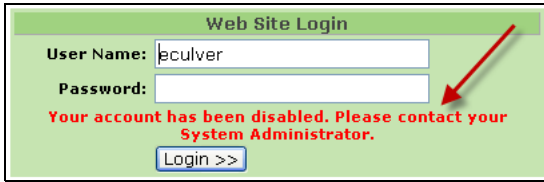
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Following are step-by-step instructions about how to disable a user's system access .

1 Click **Manage Access>Accounts Administration** to display the *Manage Access* screen (Figure 8 on page 5).

2 Select the user from the *User Name Selection:* drop-down list to display the user's access information.

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- 3 Uncheck the **Enabled?** checkbox and click  to save the change. The user is locked out of the system and receives the following message if they try to log in.



The screenshot shows a web form titled "Web Site Login". It contains two input fields: "User Name:" with the text "jculver" and "Password:". Below the fields is a red error message: "Your account has been disabled. Please contact your System Administrator." At the bottom of the form is a "Login >>" button. A red arrow points from the top right of the form towards the error message.

**Figure 12. Login Error Message**

