

## **Client Portal Reference Guide**

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# Client Portal Reference Guide

The Client Portal (Portal) provides an effective and organized way for Temenos and financial institutions to communicate with one another regarding issues and questions about Temenos Infinity and other Temenos products. Communication occurs through cases, which track the history of the issue, question, or request. The purpose of this guide is to assist Temenos and financial institutions with submitting, viewing, and working support cases in the new Client Portal, launched in Q1 of 2017.


 While this topic has been updated to reflect the new Temenos Infinity branding, Lifecycle Management Suite will continue to appear in certain images on the Client Portal until such a time that the branding can be updated.

Listed below are the attributes and actions that can be taken while using the Client Portal:

- [Logging in to the Client Portal](#)
- [Client Portal Navigation](#)
- [Support Cases](#)
  - [Creating and Submitting a Support Case](#)
  - [Accessing a Support Case](#)
    - [Accessing by Status](#)
    - [Accessing by Search](#)
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    - [Accessing by Case Lookup](#)
    - [Accessing by Assigned To](#)
  - [Support Case Navigation](#)
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    - [Related Cases](#)
    - [Notifications](#)
  - [Working a Support Case](#)
    - [Accepting and Rejecting Resolutions](#)

## Logging in to the Client Portal

To log into the Client Portal, simply browse to the Portal URL, and enter the email address and password of the user.

 If the login information established during creation of the portal user has been forgotten, click the [Forgot your email or password?](#) link to display the Customer Care support phone number.






### Client Portal Navigation

The Client Portal contains a top ribbon bar, a left navigation panel, and a main display area.




When accessing the Client Portal using a mobile device, the left navigation panel becomes a navigation button located within the ribbon bar. When clicked, options to Change Password and Log Out are displayed along with all of the navigation items described in the 2 - Left Navigation Panel section below.






### Important Announcements



**Introducing Monthly Maintenance Updates!**

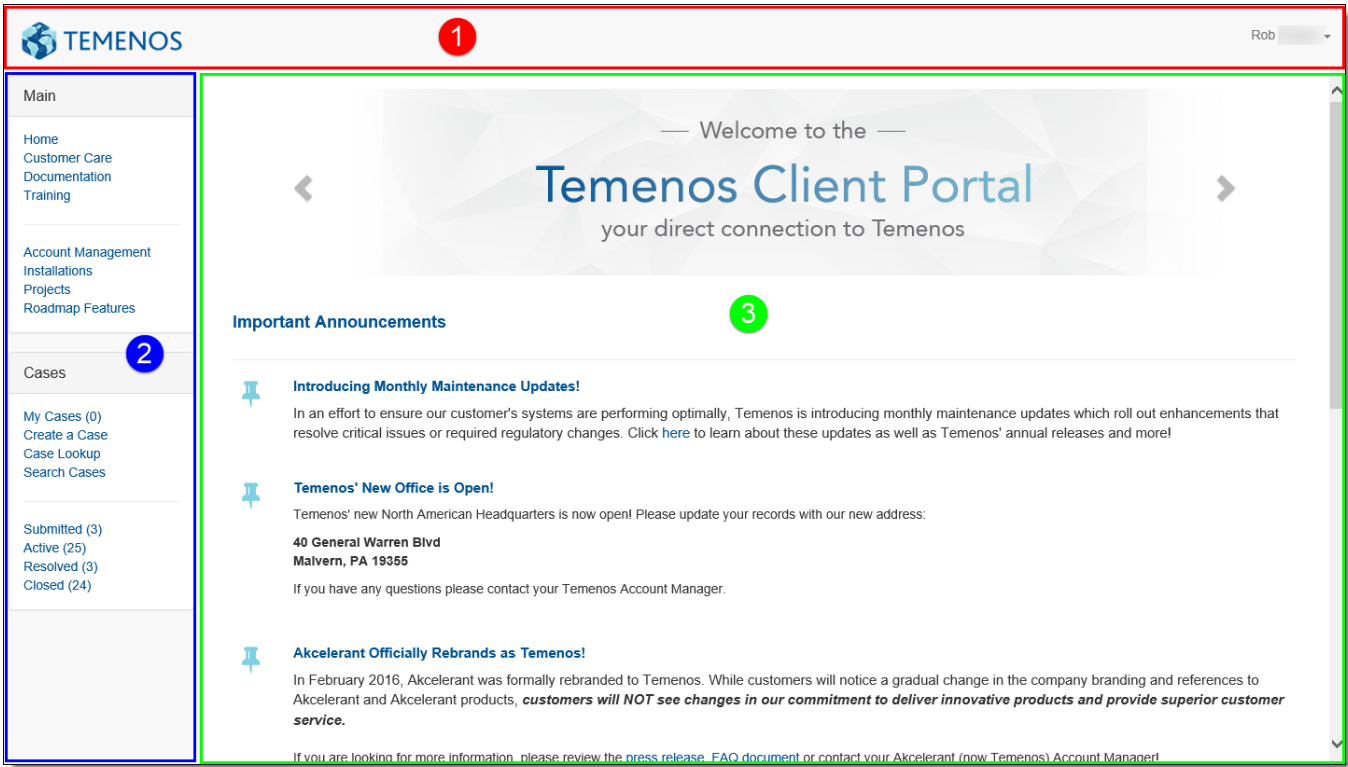
In an effort to ensure our customer's systems are performing optimally, Temenos is introducing monthly maintenance updates which roll out enhancements that resolve critical issues or required regulatory changes. Click [here](#) to learn about these updates as well as Temenos' annual releases and more!



**Temenos' New Office is Open!**

Temenos' new North American Headquarters is now open! Please update your records with our new address:

**40 General Warren Blvd**  
**Malvern, PA 19355**



► 1 - Top Ribbon Bar

The ribbon bar includes the name of the user currently logged in to the Portal. When the user's name is clicked, a drop-down is displayed with options to change the password or log out of the Portal.



To change the password used to access the Portal, select **Change Password**. Within the Change Password screen, enter the current password in the Current Password field, and the new password in the New Password and Confirm Password fields. When finished, click **Change Password**.

To log out of the Portal, select **Log Out**. The user is automatically logged out of the Portal.

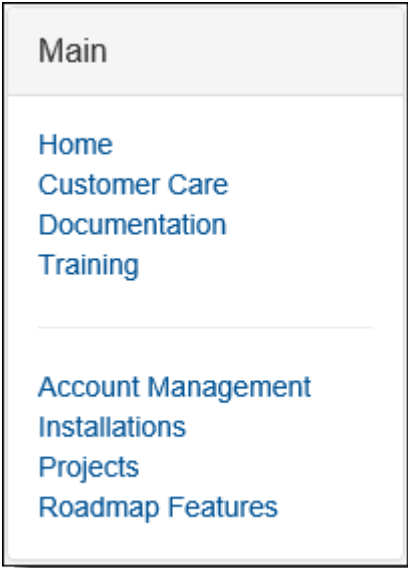
► 2 - Left Navigation Panel

The left navigation panel includes various links to navigate to different pages within the Portal and provides users with the ability to create and review support cases.


The left navigation panel contains two sections: Main and Cases.

Main

The Main section of the left navigation panel provides all Portal users with the ability to navigate to various pages in the Client Portal.



The Main section contains the following navigation options:

Option	Description
Home	Select Home to navigate to the Client Portal home page.
Customer Care	Select Customer Care to view Temenos' Customer Care mission and policies.
Documentation	Select Documentation to navigate to the Documentation home page, which provides links to documentation for each Temenos module and connector.
Training	Select Training to view Temenos Infinity and Elements Professional Services training menus as well as quick links to recorded webinars.
Account Management	Select Account Management to view details about the Account Management team as well as some common account management resources.
Installations	Select Installations to view a list of releases available for install.
Projects	Select Projects to view a list of projects for the financial institution.
Roadmap Features	<div>Select Roadmap Features to navigate to the Temenos Roadmap to vote for features the financial institution would like to see included in a future software release.  For more information on roadmap features, please see the <a href="#">Roadmap Features</a> topic of the User and Administrator Guide.</div>

Cases

The Cases section of the left navigation panel contains links to create a new support case and view existing support cases.

For more information on the functions contained within the Cases section, please refer to the [Creating and Submitting a Support Case](#) and [Accessing a Support Case](#) sections of this guide.



► 3 - Main Display

The content displayed within the main area changes depending on the link chosen from the left navigation panel.

## Support Cases

### Creating and Submitting a Support Case

To create a new support case within the Portal, select the Create a Case link from the left navigation panel. The Create Case screen is displayed.

Customer Care / Create a Case

Create Case

Title

Description

Attachment

Browse...

Priority

Medium

Type


Problem

Source

Extranet


Product

Enter information within the following case detail fields:

 Temenos is able to update the values within these fields, such as the case Priority or Type, if they do not match the case submission standards.

Field	Description
Title	Enter a brief yet descriptive title for the case. For example, the title "Unable to Add Merge Fields to Letters" is more helpful than "Letters."
Description	Enter the complete details regarding the case. As much information as possible should be provided to ensure a quick turnaround and resolution.



Attachment	Click <b>Browse...</b> to locate any supporting documents to load to the case. For example, if account data appears differently between Temenos Infinity and the financial institution's core system, it would be helpful to include screen shots of the data in question in both systems to assist with troubleshooting.										
Priority	<p>From the drop-down, select one of the following priorities:</p> <table> <tr> <th>Priority</th><th>Description</th></tr> <tr> <td>Critical</td><td>Select Critical for serious system issues that prevent day-to-day functions from being completed. Critical should be reserved for things such as process failure, or if the system cannot be accessed.</td></tr> <tr> <td>High</td><td>Select High for issues that impact day-to-day functions on a smaller scale but business functions can resume, such as a letter is not generating on an account, or data appears incorrect on an account.</td></tr> <tr> <td>Medium</td><td>Select Medium for issues that need to be resolved, but are not time-critical.</td></tr> <tr> <td>Low</td><td>Select Low for issues that do not impact day-to-day functions and are not time-critical.</td></tr> </table> <p> For more information on selecting case priorities, please navigate to Customer Care &gt; Selecting Case Priority within the Client Portal.</p>	Priority	Description	Critical	Select Critical for serious system issues that prevent day-to-day functions from being completed. Critical should be reserved for things such as process failure, or if the system cannot be accessed.	High	Select High for issues that impact day-to-day functions on a smaller scale but business functions can resume, such as a letter is not generating on an account, or data appears incorrect on an account.	Medium	Select Medium for issues that need to be resolved, but are not time-critical.	Low	Select Low for issues that do not impact day-to-day functions and are not time-critical.
Priority	Description										
Critical	Select Critical for serious system issues that prevent day-to-day functions from being completed. Critical should be reserved for things such as process failure, or if the system cannot be accessed.										
High	Select High for issues that impact day-to-day functions on a smaller scale but business functions can resume, such as a letter is not generating on an account, or data appears incorrect on an account.										
Medium	Select Medium for issues that need to be resolved, but are not time-critical.										
Low	Select Low for issues that do not impact day-to-day functions and are not time-critical.										
Type	<p>From the drop-down, select one of the following types:</p> <table> <tr> <th>Type</th><th>Description</th></tr> <tr> <td>Problem</td><td>Select Problem if the case is regarding an issue with the system.</td></tr> <tr> <td>Question</td><td>Select Question if the case is regarding a question with how the system should function.</td></tr> <tr> <td>Request</td><td>Select Request if the case is regarding an interest in upgrading to a new release, receiving documentation, or if it is desired for Temenos to assist with system configurations.</td></tr> </table>	Type	Description	Problem	Select Problem if the case is regarding an issue with the system.	Question	Select Question if the case is regarding a question with how the system should function.	Request	Select Request if the case is regarding an interest in upgrading to a new release, receiving documentation, or if it is desired for Temenos to assist with system configurations.		
Type	Description										
Problem	Select Problem if the case is regarding an issue with the system.										
Question	Select Question if the case is regarding a question with how the system should function.										
Request	Select Request if the case is regarding an interest in upgrading to a new release, receiving documentation, or if it is desired for Temenos to assist with system configurations.										
Product	<p>From the drop-down, select the Temenos module for which the case is regarding. The following options are available for selection:</p> <ul style="list-style-type: none"> <li>● Account Origination</li> <li>● AutoPilot</li> <li>● Collection</li> <li>● Elements</li> <li>● Loan Origination</li> <li>● Other</li> <li>● Profitability</li> <li>● Recovery</li> <li>● Service</li> </ul>										
Project	From the drop-down, select the project for which the case is regarding.										





Case Owner	<p>By default, the Case Owner field displays the name of the Portal user who is creating the case, but a new case owner can be selected, if desired. The case owner receives email notifications when activities occur on the case.</p> <div> This drop-down populates with the names of all of the active Portal users for the financial institution.</div>
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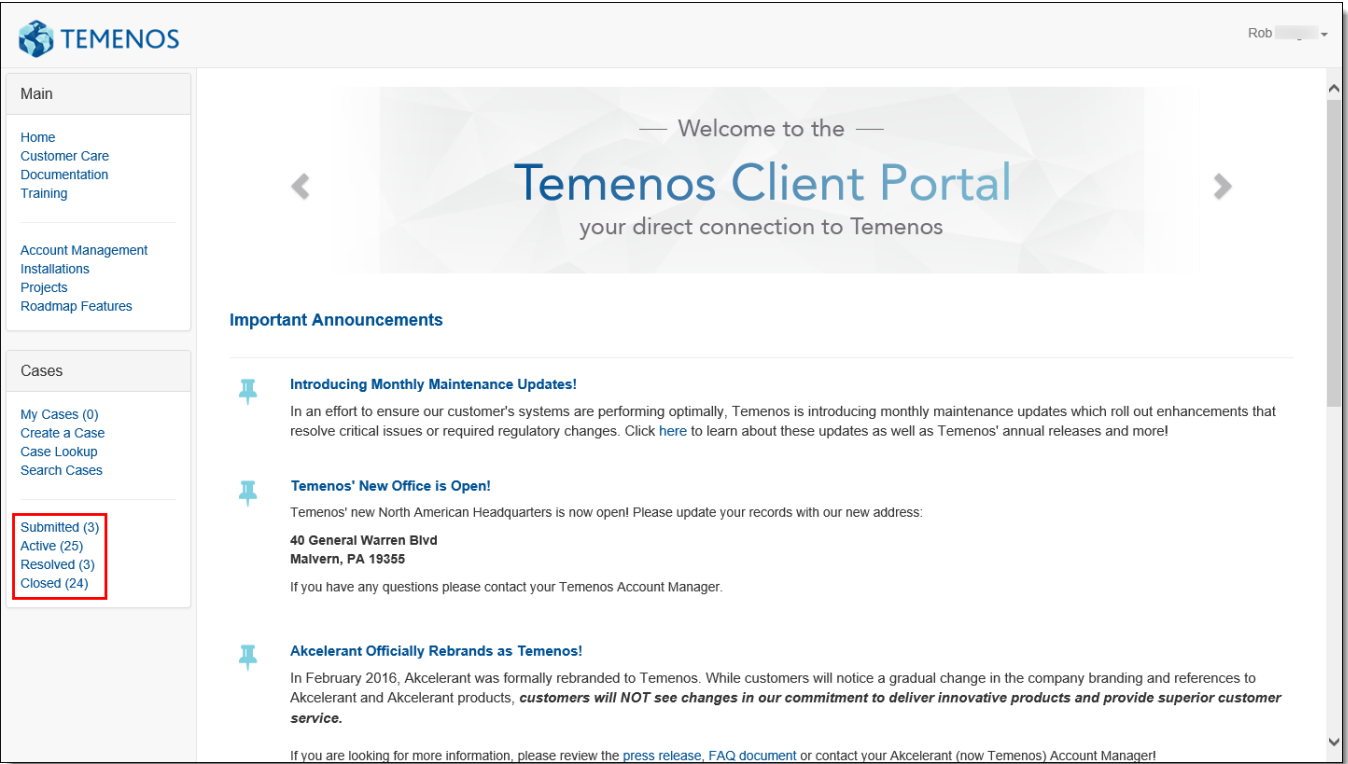
When finished entering the case details, click **Create Case** to submit the case to Temenos. A unique eight digit number is assigned to the case upon submission.

Accessing a Support Case

Existing cases can be accessed in four ways: based on status, through a search, by looking up the case number, or by viewing a list of cases assigned to the logged in user.

Accessing by Status

To view a list of existing support cases according to status, select the Submitted, Active, Resolved, or Closed links from the left navigation panel. The number of cases in each status is displayed in parenthesis following the status.



Upon selecting a status link, a list of all cases in that status is displayed. To view a case, click the desired Case # link.





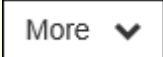
Customer Care / Submitted Cases

Submitted Cases


Case #	Title	Type	Priority	Created	Next Action	Due
31309148	New case change123	Problem	Medium	1/7/2017	Smith	1/7/2017
61832652	Test Case	Problem	Medium	12/7/2016	Smith	12/7/2016
358442381	Charge Off Addendum File	Request	High	1/16/2015	Smith	2/27/2015

Accessing by Search

If a specific case number is not known, a search can be performed for cases that meet certain criteria. To search for an existing case, select the Search Cases link in the left navigation panel. By default, within the Case Search screen, the filter is set to display all cases in Submitted or Active status assigned to the logged in user. If desired, click  to change the filter options.


 Click  to change the columns displayed within the Search page, export the results to Excel, or to open the search page in a new window.



Upon selecting the desired filter(s), the case list automatically updates. To view a case, click the desired Case # link.


 The case list displays up to 200 cases.

Customer Care / Case Search


Refresh





 



6 cases

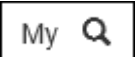
Assigned To: 

Status: Submitted, Active 



Case #	Title	Priority	Status	Type	Next Action	Due
551080198	BASIC PERSON SEARCH (BPS) ERROR MESSAGE	Medium	Active	Request	Smith	2/20/2015
187947654	AP Account Services – Activation of Send all accounts feature for V14	High	Active	Request	Smith	2/24/2015
778939921	PROD - Failed Logins - SQL Server Alert System: 'Login Failed3' occurred on	High	Active	Problem	Smith	2/26/2015
358442381	Charge Off Addendum File	High	Submitted	Request	Smith	2/27/2015
413858178	Missing Joint Owners and Co Makers	High	Active	Problem	Smith	3/4/2015
802412385	EXPORT FILE FAILURES	High	Active	Problem	Smith	3/5/2015

Saved Searches

The current search criteria can be saved for later use by clicking  within the Case Search screen. Within the My Searches window, enter a name for the search and click **Create Search**. When finished, click **Close**.



My Searches

Save current filters as a new search:

Enter name

Create Search

Close

Once created, saved search criteria can be accessed by clicking 

My

 within the Case Search screen and selecting the desired search from the My Searches window.

My Searches

Test

Save current filters as a new search:

Enter name

Create Search

Close

Accessing by Case Lookup

If a specific case number is known, select the Case Lookup link within the left navigation panel. Within the pop-up window, enter the case number and click **Find Case**. The case automatically opens in a new Internet Explorer tab.

Enter the Case Number


Find Case

Close

Accessing by Assigned To



To view all cases assigned to the currently logged in user, select the My Cases link in the left navigation panel.

 The number of cases currently assigned to the logged in user is displayed in parenthesis following the My Cases link.

To view a case, click the desired Case # link.


Customer Care / My Assigned Cases						
My Assigned Cases						
Case #	Title	Type	Priority	Created	Next Action	Due
No cases found						

Support Case Navigation


Upon accessing a support case according to status or through a search, the case opens in a new Internet Explorer tab and contains a left navigation panel, which contains three sections.



When accessing a support case using a mobile device, the left navigation panel becomes a navigation button located within the Portal ribbon bar. When clicked, all of the navigation items described in the following sections are displayed.







Test case

History 

Comments

Files

Actions

Jeffrey 	public	Dec 22, 9:14 am
Jeffrey 	test notification	Nov 23, 11:22 am
Jeffrey 	Case Activated	Nov 23, 11:21 am
Jeffrey 	i can't do something	Aug 10, 11:03 am



Case 828650723 - Test case

Submitted

Active

Resolved

Closed

Comment

Attach

Relate Case

Print

Save

CU

Symitar (Core)

Problem, Medium

Jeffrey

Nov 24

(Next Action)

Isaac (Client)

Jeffrey (Temenos)

Aug 10 (created)

Nov 23 (activated)

(not resolved)

(not closed)

0 Attachments

1 Related Cases

2 Notifications

History

Info

Resolution

Attachments (0)

Related Cases (1)

Notifications (2)

Comments

Files

Actions

Jeffrey	public	Dec 22, 9:14 am
Jeffrey	test notification	Nov 23, 11:22 am
Jeffrey	Case Activated	Nov 23, 11:21 am
Jeffrey	I can't do something	Aug 10, 11:03 am

► 1 - Case Status

The Case Status section of the case left navigation panel contains the four possible case statuses and indicates the case's current status with a green circle and corresponding green text. In the example above, the case has a status of Active.

► 2 - Case Actions

The Case Actions section of the case left navigation panel contains five case-related functions: Comment, Attach, Relate Case, Print, and Save.

Comments

Comments are an integral part of cases, as they are used to record the progress being made on a case and assign a case to other users.

To add a new comment to a case, select the Comment link in the left navigation panel.

Within the Add Comment window, enter the comment within the text box. When finished, click **Next**.



Add Comment

Assigning case to Tanya for review.

<< Back

Next >>

Cancel

The Assign Next Action screen is displayed and indicates the user to which the case is currently assigned, and provides options to leave the case assigned to the currently assigned user, assign to the Temenos user, or assign to another user. Once the next action user has been assigned, select the date by which the action is to be completed by clicking within the **Set the due date for this action** box. Clicking within this box displays a calendar from which a date can be chosen. Once a next action user and date have been selected, click **Add Comment**.

Assign Next Action

The next action is currently assigned to Nicki

☐ Do not change assignment

☐ Assign to Temenos (Nancy)

☒ Assign to another user

Tanya

Set the due date for this action

01/04/2017

<< Back

Add Comment


Cancel

Upon clicking **Add Comment**, the comment as well as any changes in case assignment and action date are added to the case's History tab.

Attach




Clicking the Attach link within the left navigation panel provides users with the ability to attach a document to the case.

 For further instructions on how to add an attachment to a case, please refer to the [Attachments](#) section of this topic.

## Relate Case

Clicking the Relate Case link within the left navigation panel provides users with the ability to link two similar cases together.

 For further instructions on how to relate cases, please refer to the [Related Cases](#) section of this topic.

## Print

Clicking the Print link within the left navigation panel provides users with the ability to print the case using the standard Windows print dialog window. Make any modifications to the printing preferences displayed within the Windows print dialog and click **Print**.

## Save


Clicking the Save link within the left navigation panel provides users with the ability to save the case after an action has been performed, such as updates to basic case information on the Info tab.

### ► 3 - Case Information

The Case Information section of the case left navigation panel contains basic information related to the case, such as the financial institution's core, case type and priority, next action owner, client and Temenos owners, key case dates, and the number of attachments, related cases, and notifications on the case.





 The majority of the information within the Case Information section is read-only; however, clicking the client or Temenos user's name opens a blank email form that can be completed and sent directly to the user.

Symitar (Core)

Problem, Medium

Jeffrey

Nov 24

(Next Action)

Isaac  (Client)

Jeffrey  (Temenos)

Aug 10 (created)

Nov 23 (activated)

(not resolved)

(not closed)

0 Attachments

1 Related Cases

2 Notifications

Support Case Attributes

All cases share the same common attributes. When a case is accessed according to status or through a search, the History, Info, Resolution, Attachments, Related Cases, and Notifications tabs are displayed across the top of the case screen.



When accessing a support case using a mobile device, the attribute tabs are listed within a drop-down beneath the ribbon bar. When clicked, options to view all of the attributes described in the following sections are displayed.

Test case

History

▼

Comments

Files

Actions

Jeffrey	public	Dec 22, 9:14 am
Jeffrey	test notification	Nov 23, 11:22 am
Jeffrey	Case Activated	Nov 23, 11:21 am
Jeffrey	i can't do something	Aug 10, 11:03 am

History

The History tab is displayed by default and lists a record of each action taken on the case, including the name of the user who performed the action, the action performed, and the date the action was performed.

Three buttons appear above the history records to provide users with the ability to easily click to filter the items displayed within the History tab. A button is on, and displaying the corresponding history records, when it appears green. A button is off, and the corresponding history records are not displayed, when it appears grey.



Case 61832652 - Test Case

Submitted

Active

Resolved

Closed

Comment

Attach

Relate Case

Print

Save

CU

Symitar (Core)

Problem, Medium

Smith

Dec 7

(Next Action)

Varano (Client)

Smith (Temenos)

Dec 7 (created)

(not activated)

(not resolved)

(not closed)

0 Attachments

0 Related Cases

1 Notifications

HistoryInfoResolutionAttachments (0)Related Cases (0)Notifications (1)

CommentsFilesActions

Amy

This is a test case

Dec 7, 6:17 pm

Info

The Info tab displays basic information about the case, such as the case type, priority, module, and owner. The projected resolution date and the amount of time the case has been assigned to Temenos and the institution are also displayed. Any information that is edited within the Info fields is updated on the case in real time.

HistoryInfoResolutionAttachments (0)Related Cases (0)Notifications (1)

61832652 - Test Case

Type

Problem

Priority

Medium

Source

Extranet

Title

Test Case

Description

This is a test case

Impact

Product

Project

V14 Upgrade

Case Owner

Amy

Environment

Rank

Temenos Owner #1

Carla

Temenos Owner #2


David



When finished updating the basic case information, click the Save link in the left navigation panel.

Resolution

The Resolution tab displays the information that is required for completion in order to resolve a case. When the case has been worked and is ready to be resolved, Temenos Customer Care completes the Root Cause, Resolutions, and Improvements sections of the screen to provide details on what caused the case, resolution steps, and any suggestions for how this case can be avoided in the future.

 The Resolution tab cannot be edited by a Portal user at a financial institution.

HistoryInfoResolutionAttachments (0)Related Cases (0)Notifications (1)

Root Cause

☐ Knowledge - Supplemental Info  
☐ Configuration - Front End  
☐ Defect  
☐ Configuration - Back End  
☐ Enhancement  
☐ Duplicate Case  
☐ Bad Data

Enter comments about what caused this case

Resolutions

☐ Hotfix  
☐ No Response from Customer  
☐ Required Escalation  
☐ First Tier Resolution  
☐ Clean up - Executed one-time script  
☐ COM+ - Change identity  
☐ COM+ - Rebuild application  
☐ COM+ - Deleted

Enter comments about the steps taken to resolve this case

Improvements

Enter comments about improvements to process, documentation, communication that will result in quicker resolution

Attachments

The Attachments tab displays any supporting documents currently loaded to the case and provides users with the ability to attach additional documents to the case.

To add a new attachment to the case,

- Click **Attach File...**
- Within the Add Attachment window, click **Browse...** to browse to the location of the desired document.
- Indicate whether the attachment contains Personally Identifiable Information (PII).
- When finished, click **Attach** to add the document to the case.



Add Attachment

Browse...

Does this attachment contain PII? [Explain this...](#)

Choose an option

Attach

Cancel

Upon clicking Attach, the document is listed within the Attachments tab and can be viewed by clicking the desired File Name link. The number in parenthesis within the Attachments tab is also updated to reflect the new number of attachments on the case.

HistoryInfoResolution**Attachments (1)**Related Cases (0)Notifications (1)

Attach File...

Added By	File Name	Date
<div>Smith</div>	<a href="#">Cross Sell auto approval.docx</a>	Dec 7, 5:48 PM

Related Cases

Cases can be related to each other if they are regarding the same thing, making it easier for Temenos to work the case and look up prior case actions and resolutions.

To relate an existing case to the current case, select the Relate Case link in the left nagivation panel. Within the Relate Case window, enter the number of the related case and a description of why the cases are being related. When finished, click **Relate**.



Relate Case

Case Number

Description

Relate


Cancel

Upon clicking **Relate**, the case is listed within the Related Cases tab and can be viewed by clicking the desired Case # link. The number in parenthesis within the Related Cases tab is also updated to reflect the new number of relationships on the case.

History	Info	Resolution	Attachments (1)	Related Cases (1)	Notifications (3)
Case #	Title		Description		
64873716	Another Test -mh		Test		

Notifications

The Notifications tab displays the Portal users who receive notifications when comments are added or the case status changes.

To add additional users to notifications, locate the desired user by scrolling through the list or enter the user’s name within the filter box. Once the user has been located, click the toggle button to the On position ().



History

Info

Resolution

Attachments (1)

Related Cases (0)

Notifications (1)

Emails will be sent to users when comments are added or the status changes. To include a user in these notifications, click the button to the "On" position.

Off

Alice

Off

Amy

On

Andy

Off

Anthony

Off

Harry

Off


Jamie

Upon adding a user to notifications, the number in parenthesis within the Notifications tab is also updated to reflect the new number of notifications on the case.

When finished, click the Save link in the left navigation panel.

### Working a Support Case

A support case is worked by entering comments, changing next action owners, and updating next action dates. Once a support case has been completed and the issue, question, or request has been resolved, the resolution must be accepted or rejected.

 If a resolution is not accepted or rejected within 30 days of the resolution date, the resolution is automatically accepted and the case is closed.

#### Accepting and Rejecting Resolutions

Once a case is in a Resolved status, users must either approve the resolution if it meets Temenos' or the financial institution's standards, or reject the resolution if it is not acceptable.

To accept the resolution on a case, locate the case and click the Accept Resolution link in the case's left navigation panel. If desired, within the Accept Resolution window, enter details about the resolution. Click **Accept** to accept the resolution and move the case to a Closed status.



Accept Resolution

If desired, add comments about the resolution

Accept

Cancel

To reject the resolution, click the Reject Resolution link in the case's left navigation panel. Within the Reject Resolution window, enter details about the rejection. Click **Reject** to reject the resolution. Upon rejection, case status updates to Active and is assigned to be worked by the last Action owner.

Reject Resolution

Add comments about why you are rejecting the resolution

Reject

Cancel