Maintel Support Client Portal – User Guide

Introduction

This document provides a user guide for customers using our Client Portal.

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Maintel Support Client Portal – Overview & Navigation

Client Portal Access

If you are a new customer to Maintel, you will have received your access details as part of your Welcome Pack. Existing customers who do not currently have access to the Client Portal can either:

- Contact your Account Manager or Service Delivery Manager who can arrange access
- Contact our Service Desk via email at: **service@maintel.co.uk**
- Contact our Service Desk on the telephone by calling: **0344 871 1122**

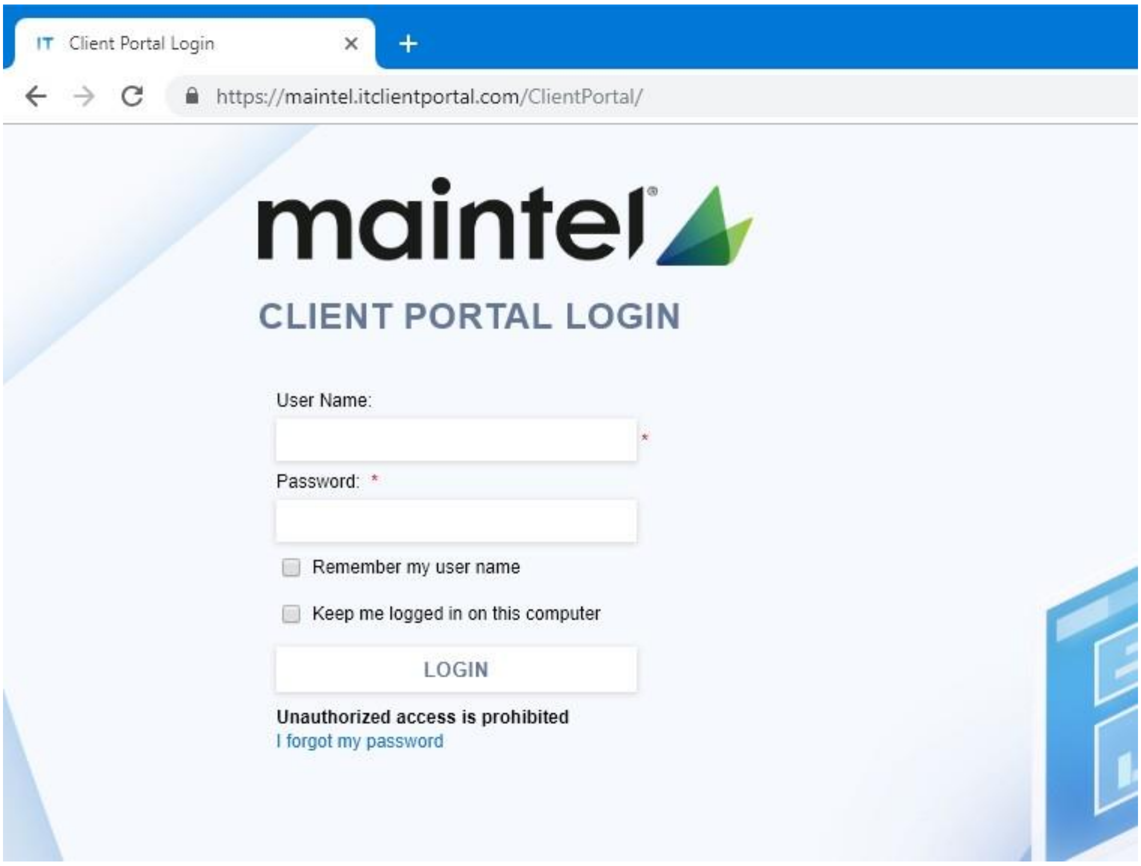
Once you have registered for access, you will receive an automated email from our system with your login credentials. Please ensure that you check junk and filtered inboxes for the sender address: **donotreply@maintel.co.uk** if you do not receive the mail.

If you still cannot locate it, please notify us at: **service@maintel.co.uk**.

The web address for our client portal is: **https://maintel.itclientportal.com/ClientPortal/Login.aspx**

Client Portal Login Page

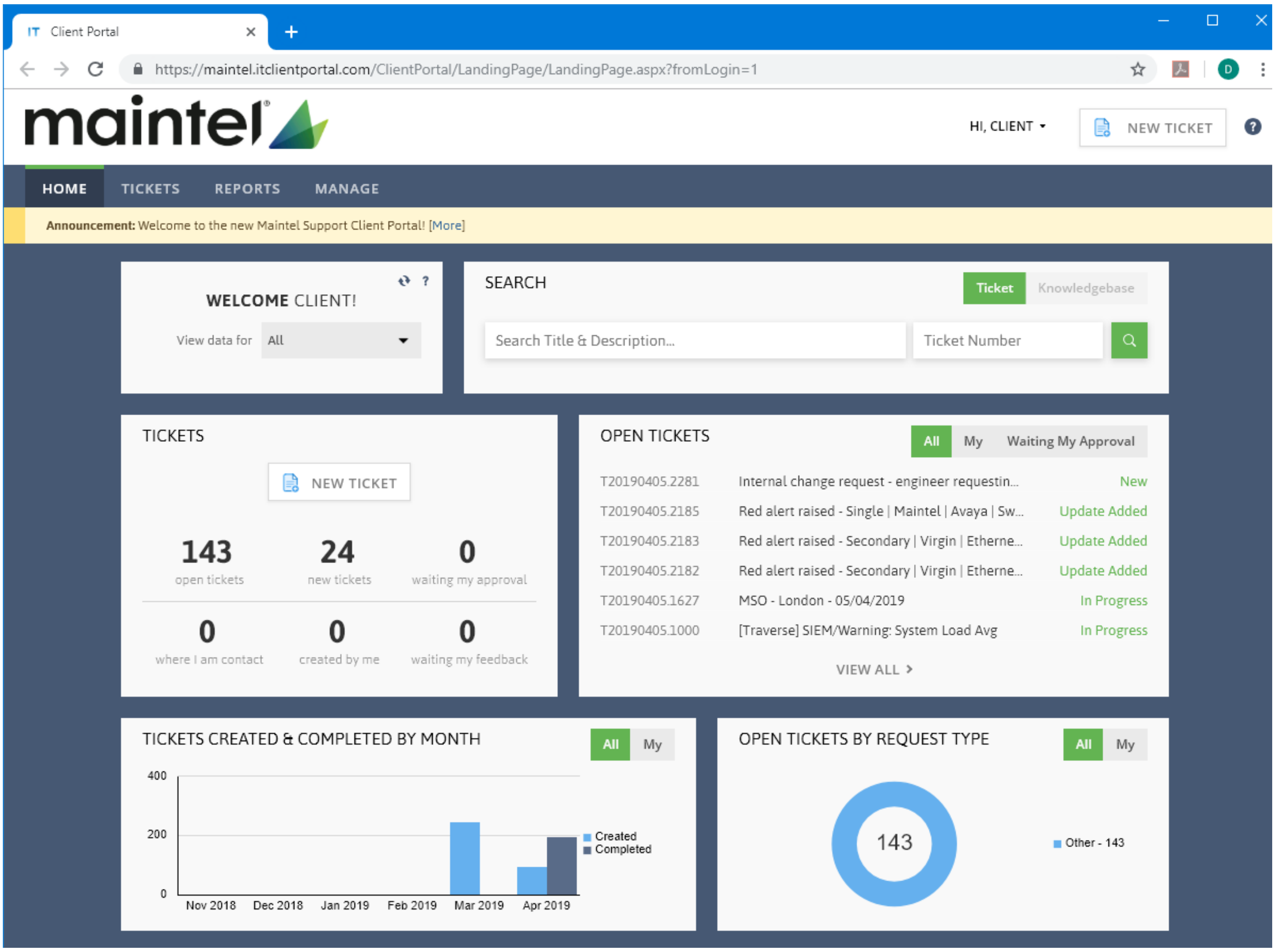
When you arrive at our Client Portal page you will need to login with the credentials provided:



If you have forgotten your password, enter your email address into the User Name box and click on the **'I forgot my password'** link to reset and resend a new password to the registered email.

Client Portal Home Page

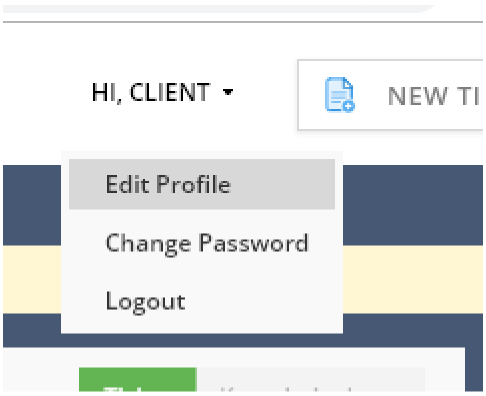
After you have successfully logged in to the Client Portal, you will arrive at the Dashboard page as per the below and several key operations can be carried out from this centralised hub.



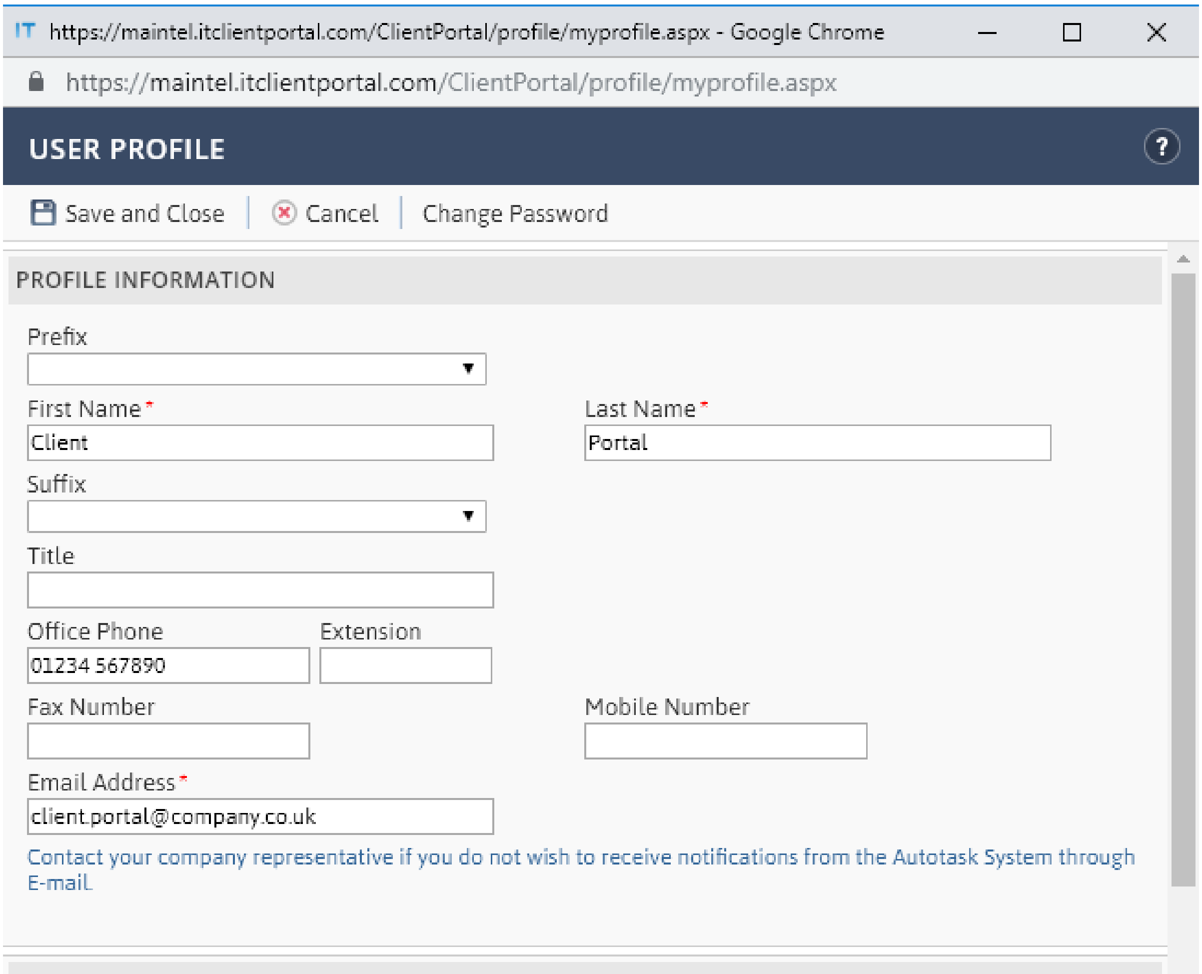
Client Portal General Operations

Editing your profile

To make changes to your profile, drop down the menu next to the **"Hi, <Name>"** text on the top menu section and choose **"Edit Profile"**.

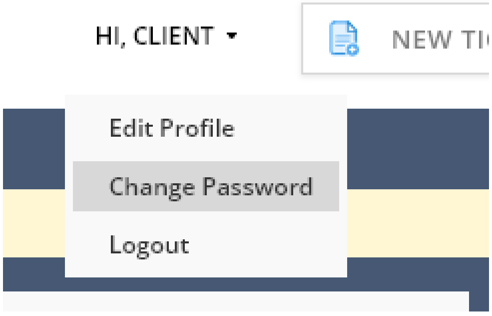


This will open a pop-up window where you can update your contact details. Should you wish to commit any changes you make, click on **"Save and Close"**:

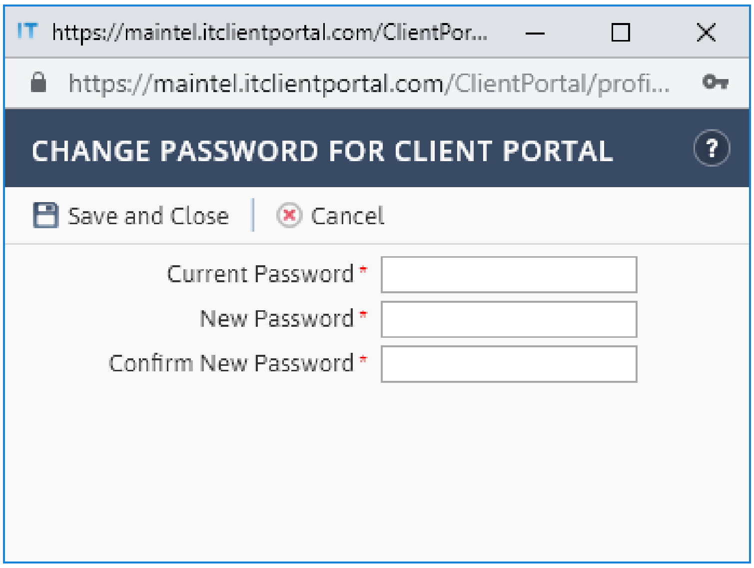


Changing your password

You can change your Maintel Support Client Portal password by using the drop down menu next to the **"Hi, <Name>"** text on the top menu section and choose **"Change Password"**.



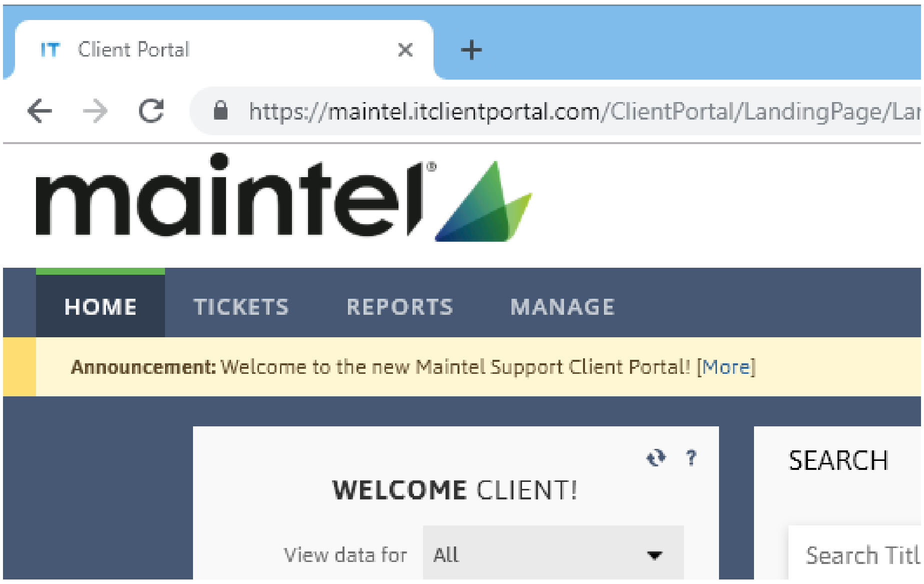
You will receive the following pop-up window where you will need to enter your current password, enter and verify your new password:



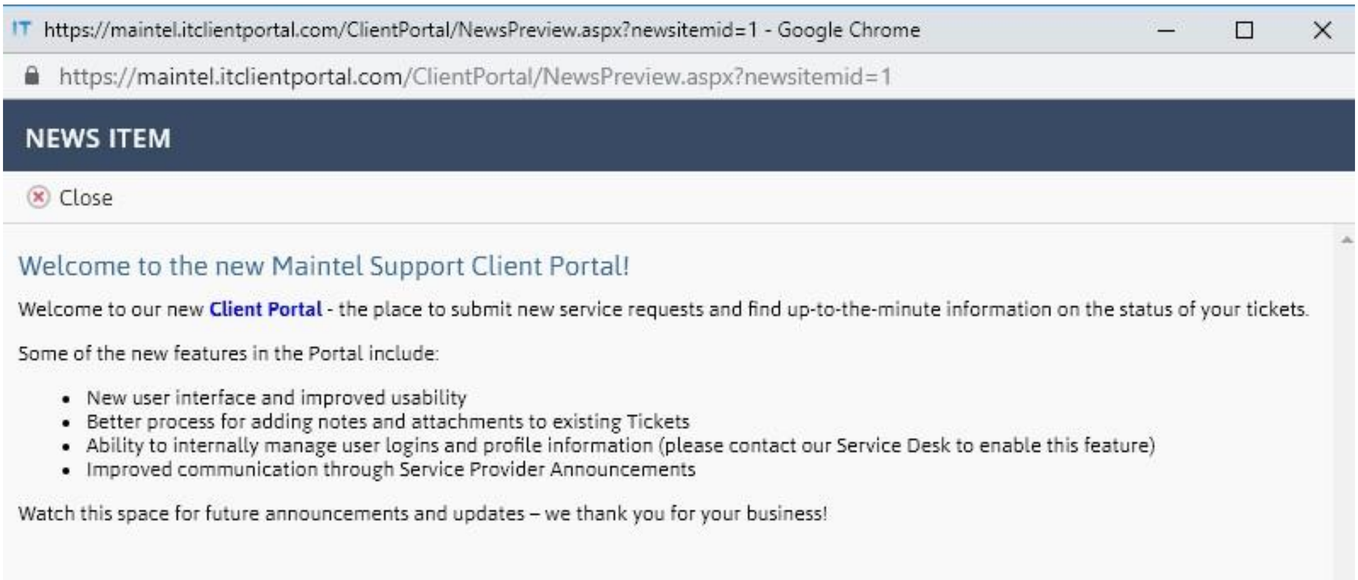
Clicking **"Save and Close"** will change your password. Please note the system does not confirm password change by email in the current release of software.

Viewing Maintel Client Support Portal Announcements

From time to time, Maintel will release announcements relating to the Client Support Portal. These can be accessed by clicking the **"[More]"** link next to the announcement title:

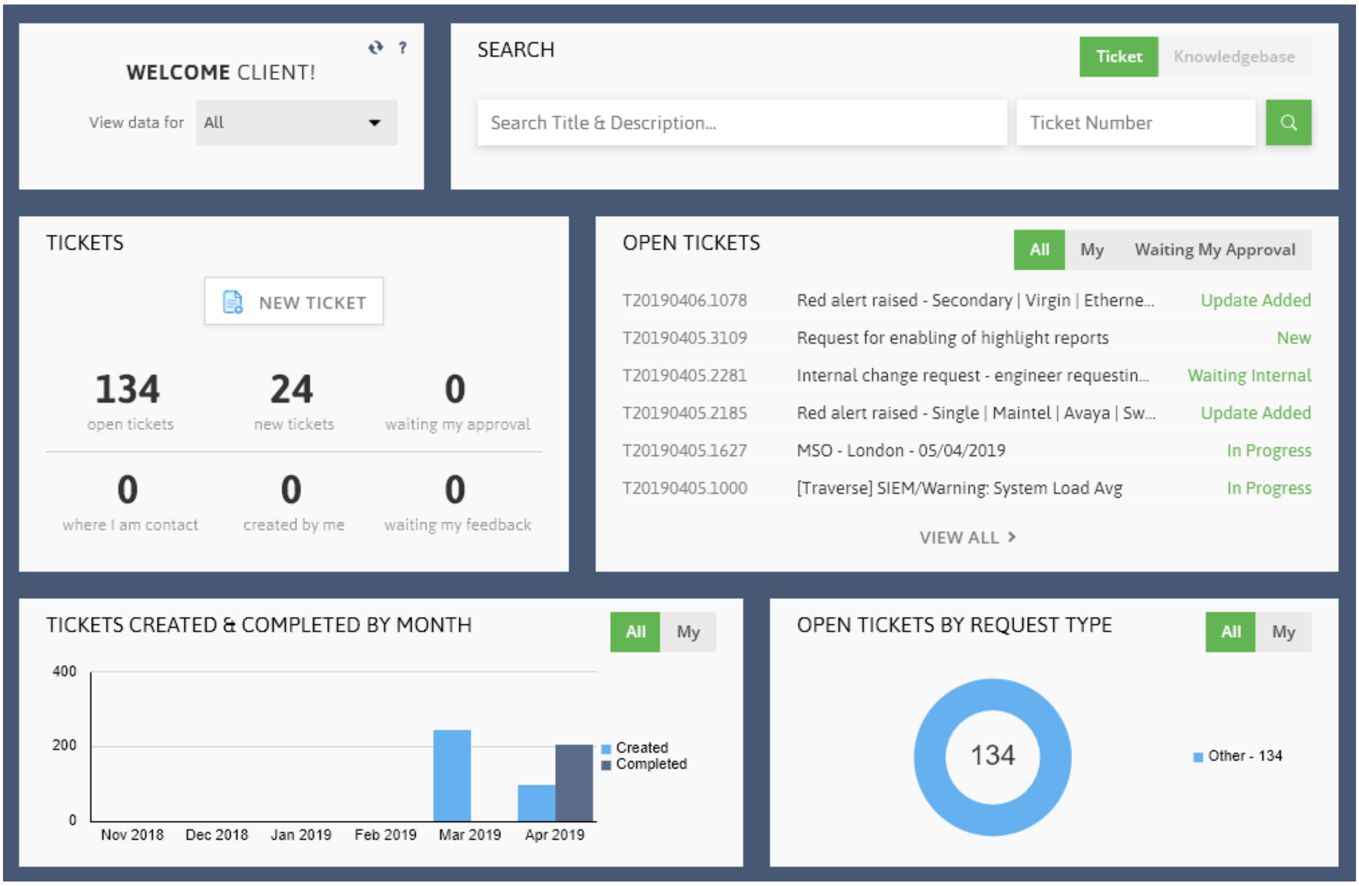


These announcements will relate to any changes to the Client Support Portal or any scheduled maintenance downtime for the Client Support Portal.



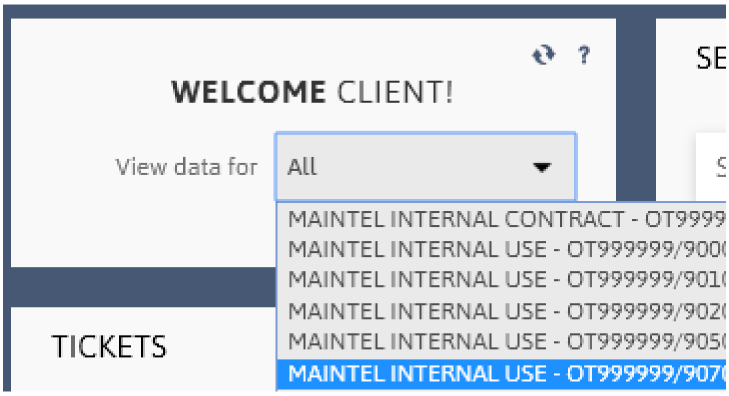
Client Portal Ticket Dashboard Navigation

The Home Page Ticket Dashboards provide a quick insight to your Support Tickets and offer several navigation options from the home page.



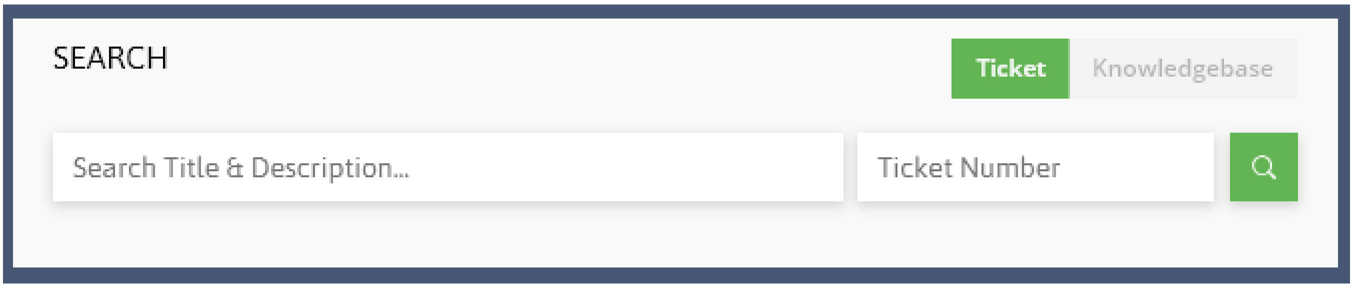
Filtering the Dashboard to view individual locations

If Maintel provide support to your organisation at numerous locations, you can filter all the dashboard objects by dropping down the menu options **"View data for"** and selecting a location from the list:

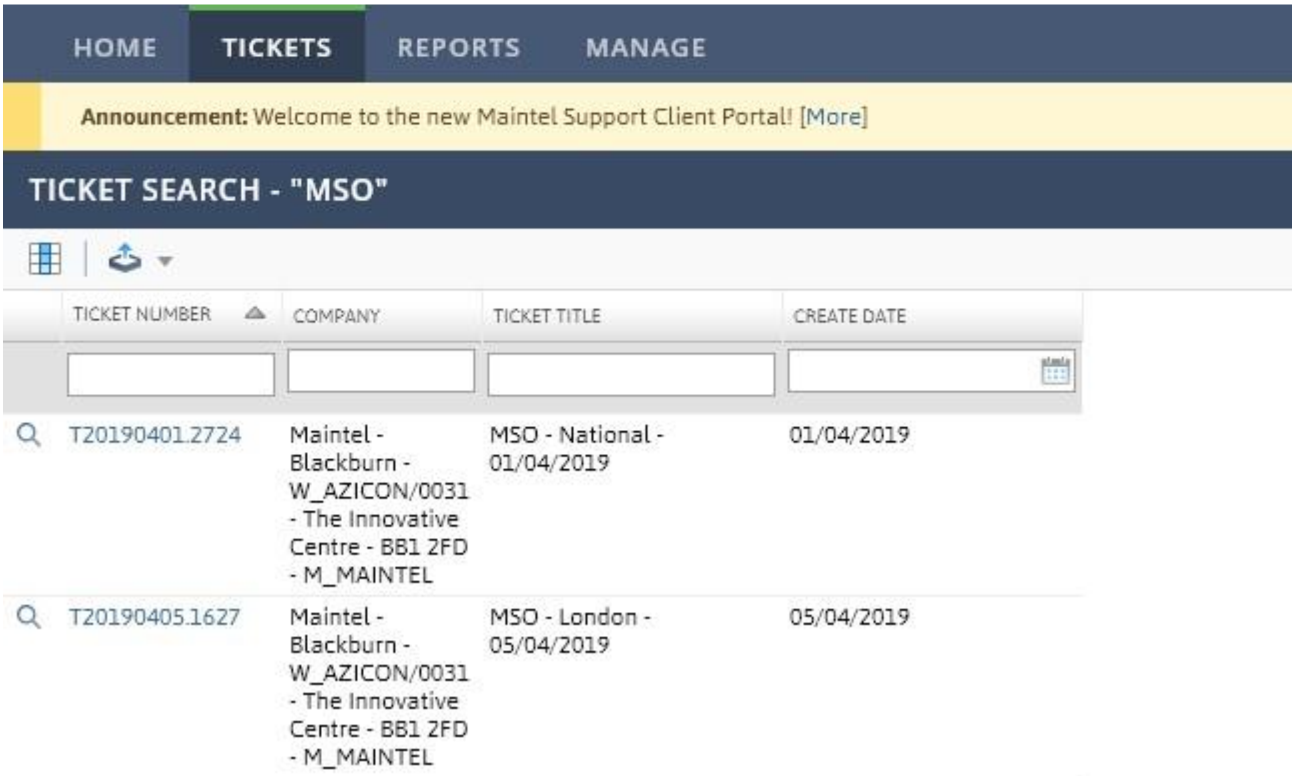


Searching for Tickets

You can quickly search for Tickets using the Search bar by entering a text search string in the **“Search Title & Description”** box or by entering a Ticket Number in the box labelled **“Ticket Number”** and clicking the magnifying glass button:



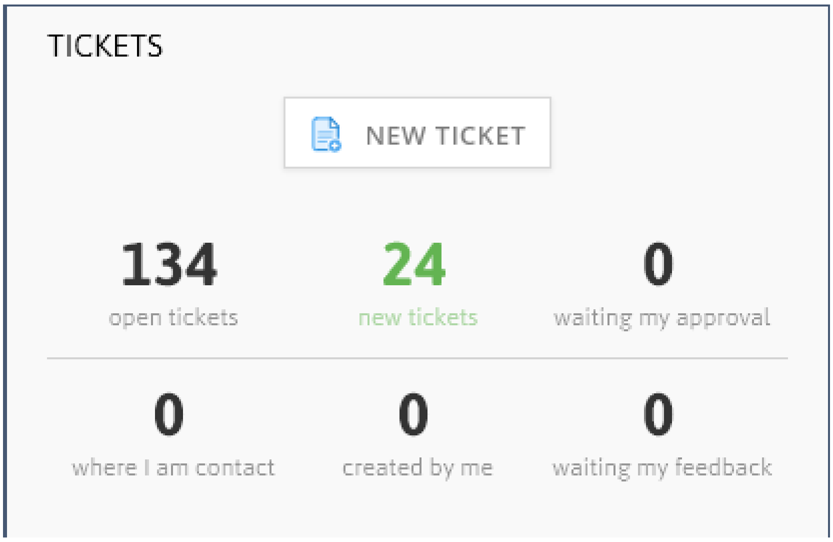
The search result will be returned and open into the Tickets tab:



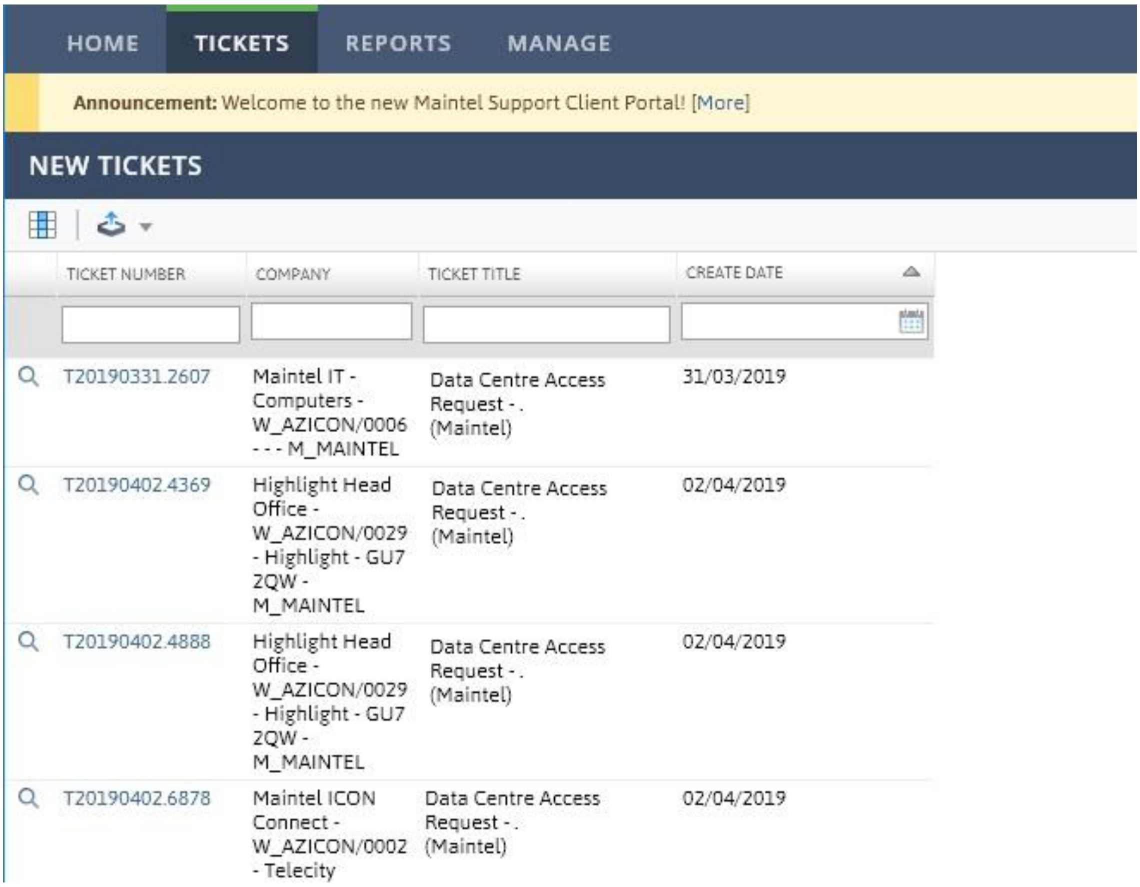
Here you can click on the magnifying glass on the left of the row or the ticket number hyperlink to open the main Ticket page for the result selected.

Ticket Dashboard Drill Through

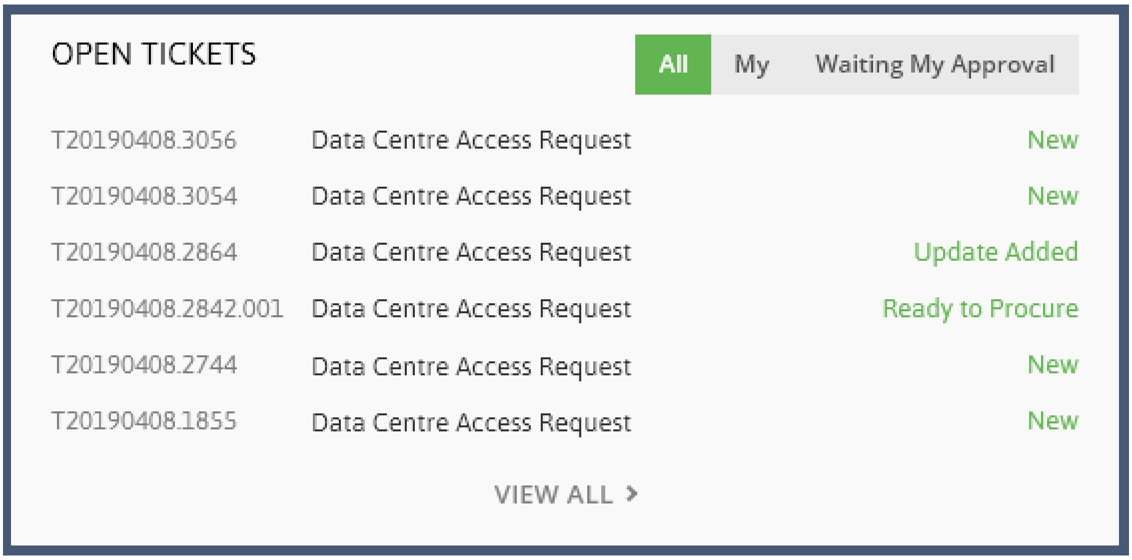
Within the **"Tickets"**, **"Tickets Created & Completed by Month"** & **"Open Tickets by Request Type"** dashboard objects, clicking on any of the metrics (which will highlight in green or present you with a link pointer) will drill through on the chosen metric into a ticket search page with the tickets filtered to the metric you clicked on:



The resulting tickets will again be displayed in the tickets tab with the chosen filter applied:



The final section on the Ticket Dashboard is the Open Tickets grid, which gives you a snapshot view of your most recent tickets, their title and the status of the tickets with Maintel:



Clicking on any of the tickets will open the ticket where you can view the latest ticket activity or add an update yourself. You can also filter the view to show **"My"** tickets (where you are the set contact for the ticket). In addition, the view can be filtered on **"Waiting My Approval"**, <u>however please note that this feature is only available where you have a Managed Service Change Advisory Board set up with Maintel.</u>

Maintel Support Client Portal – Logging a New Ticket

To log a new ticket on the Client Portal there are 2 handy buttons, one on the dashboard home page and one on the main top menu bar:

You can also drop down the **"Tickets"** menu option and choose **"New Ticket"**:

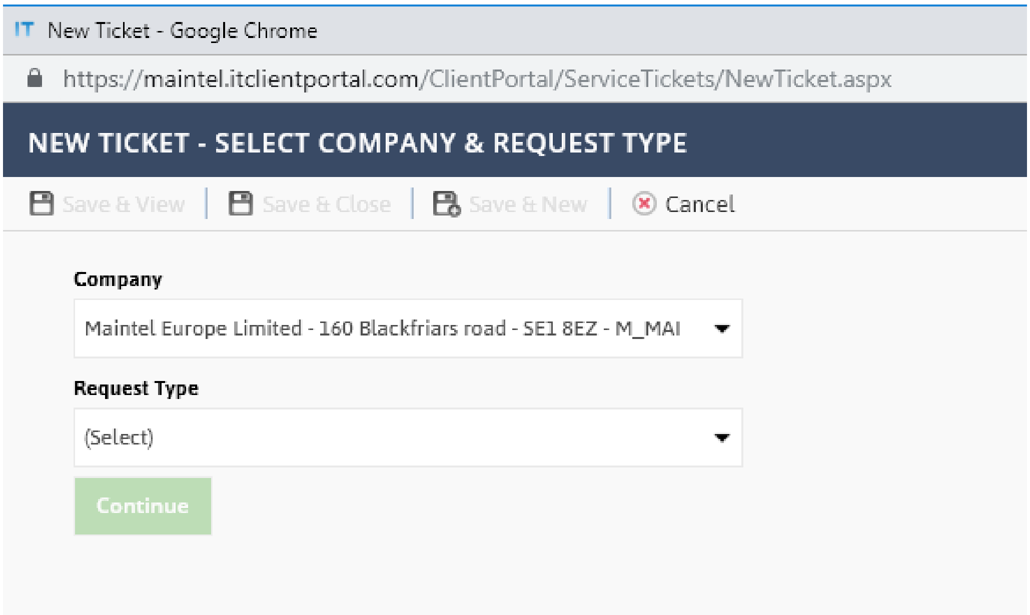
There are three types of tickets which can be logged through the Client Portal, these are summarised as follows:

Ticket Type	Description	Requires Ticket to be logged against a Supported Configuration Item (CI)
1. Incident	Support Ticket to report a failure of supported item or service where Maintel are required to intervene to provide a return to service.	Yes
2. Query	Support Ticket to request information or advice where a return to service is not required however Maintel are required to respond.	No
3. Change Request	Support Ticket to raise an addition or alteration to an existing service which Maintel provide.	Yes

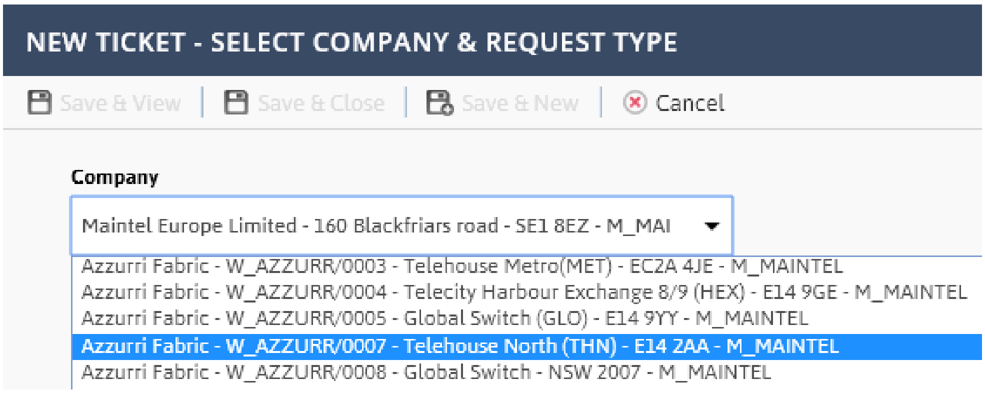
Tickets logged against correct Configuration Items will be routed directly to the relevant support teams within Maintel. A Query will be triaged by our Service Desk staff prior to directing to the relevant support teams.

Logging a New Incident Ticket

To log a new Incident Ticket, click on the **"New Ticket"** option as previously described, and you will be presented with a new ticket pop-up window:

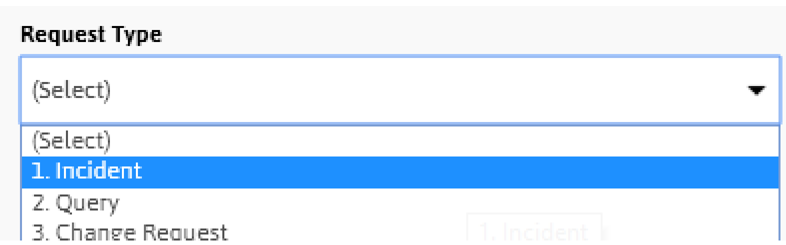


The first step is to choose the site (named within the system – **"Company"**) you would like to report the Incident against by selecting the relevant record from the drop-down menu:

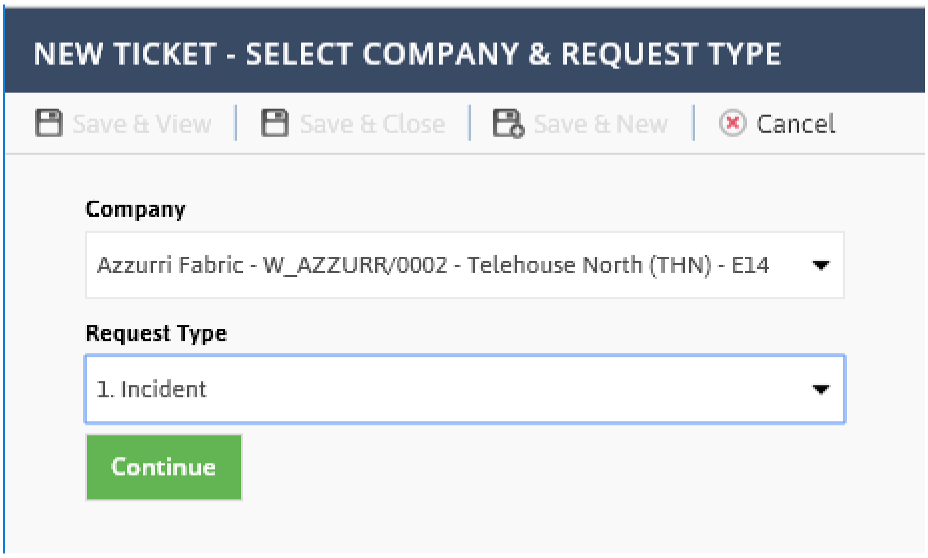


<u>It is important to choose the correct site when logging an Incident as the system will limit the choice of Configuration Items you are allowed to select based on the site selected at this point.</u>

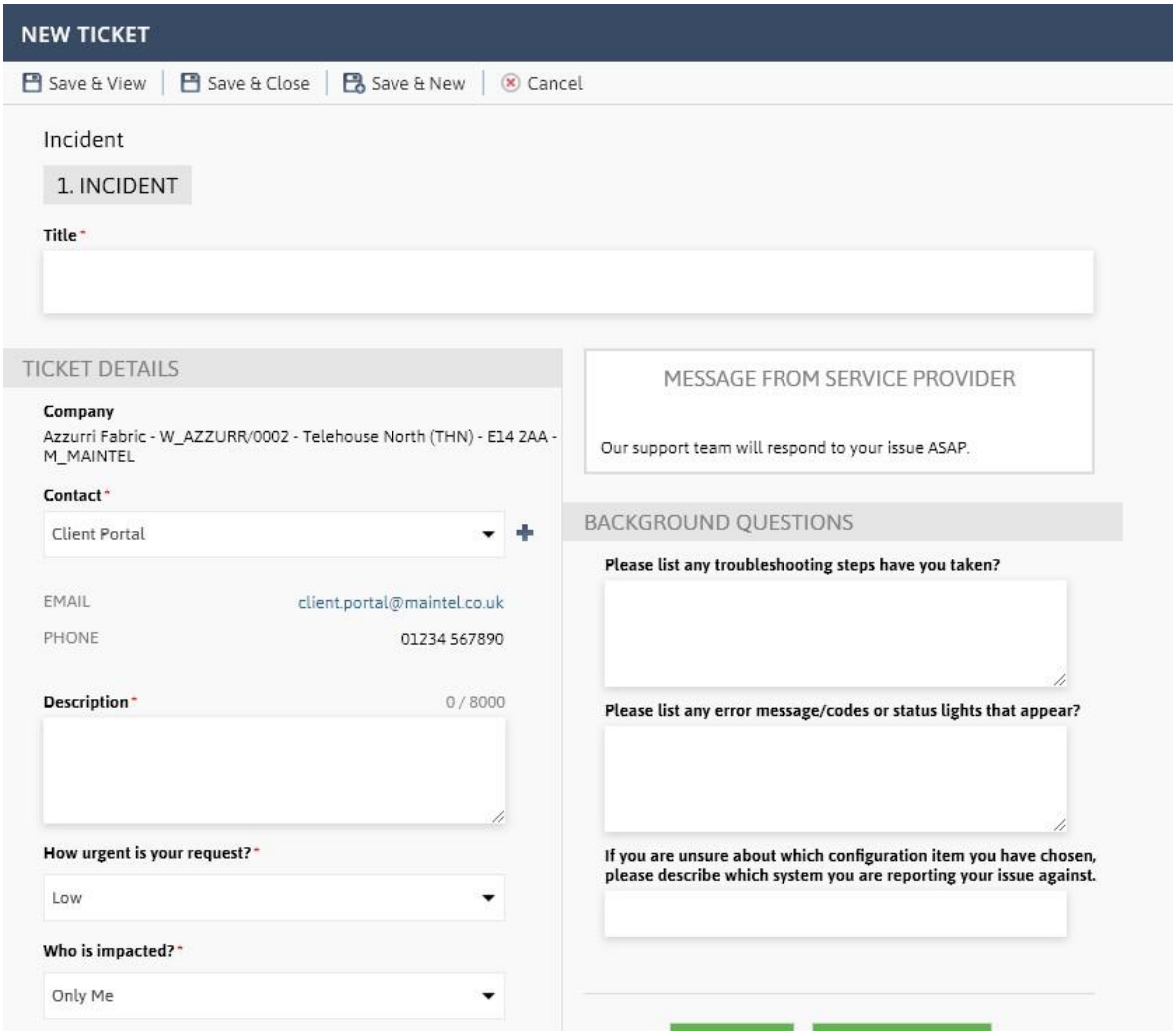
The next step is to choose the **"Request Type"** from the drop-down list, in this case we are logging an Incident hence make the selection **"1. Incident"**:



When you have made your selection, click on the **“Continue”** button to move onto the next step of ticket logging:



You will then be presented with the main **“New Ticket”** page (top half shown for illustration):



Within this section the following information is mandatory:

Field Name	Description
Title	Short description of issue you are reporting. Please note this field is used on the Dashboard Search feature.
Contact	The system will provide a default option of logging the ticket against the logged in Client Portal user. However another contact can be chosen, or if you have an Administrator profile, you can add a contact (➕) to your company at this point (see final section of this guide for details on how to carry this out).
Description	Extended description of the issue. Including as much detail in this section will enable our Support teams to process your incident efficiently. This field is also used in the Dashboard Search feature.
How urgent is your request?	Either **"Low"**, **"Medium"** or **"High"** based on the impact of the product or service you are reporting your incident against being adversely affected.
Who is impacted?	Either **"Only Me"**, **"Others"** or **"Company"** based on the impact of the incident and how widespread.
Configuration Item	You will need to choose a supported Configuration Item or Service against the site you have selected by opening the selection tray ( ) and browsing for the relevant item from the list presented.
Customer Reference	Enter a reference number (typically your Incident ticket number) which you will be able to quote should we be unable to locate your ticket by our reference number.

And the following information is optional:

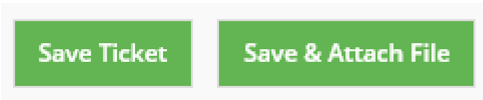
Field Name	Description
Please list any troubleshooting steps you have taken?	Describe any fault-finding actions you have carried out.
Please list any error messages/codes or status lights that appear?	Report any fault information from the devices or software that are affected, which could aid our Support teams in their troubleshooting steps.
If you are unsure about which Configuration Item you have chosen, please describe which system you are reporting your issue against.	Client Portal users to inform Maintel if they are unsure about which Configuration Item they have selected, where a more descriptive reference to the system or service type can be made.

When you have completed all the mandatory and any optional information needed, you have several options to complete the ticket logging process.

On the top menu bar, you have the options to select **"Save & View"** to submit the ticket and open the record you have created. **"Save & Close"** to commit the ticket and return to the home page or **"Save & New"** to process the ticket and start the ticket logging process again:

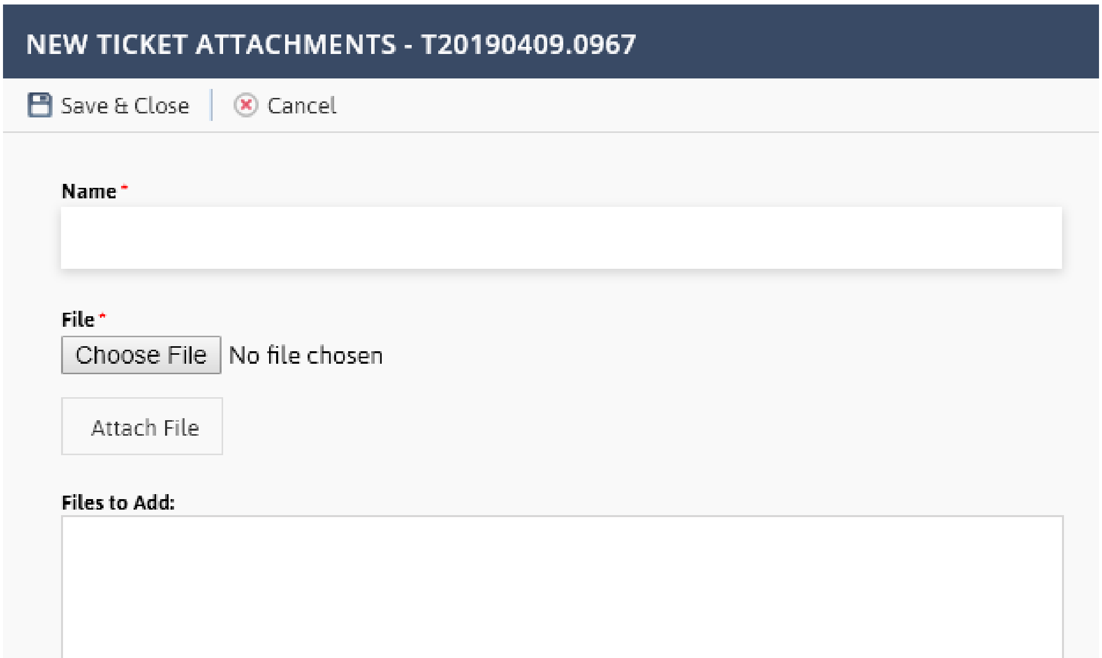
Alternatively, selecting the **"Cancel"** button will close the New Ticket page without submitting your ticket.

There are also 2 buttons on the main call logging screen where you can complete the ticket logging process:



Selecting the **"Save Ticket"** option will submit the ticket and open the record you have created for you to view.

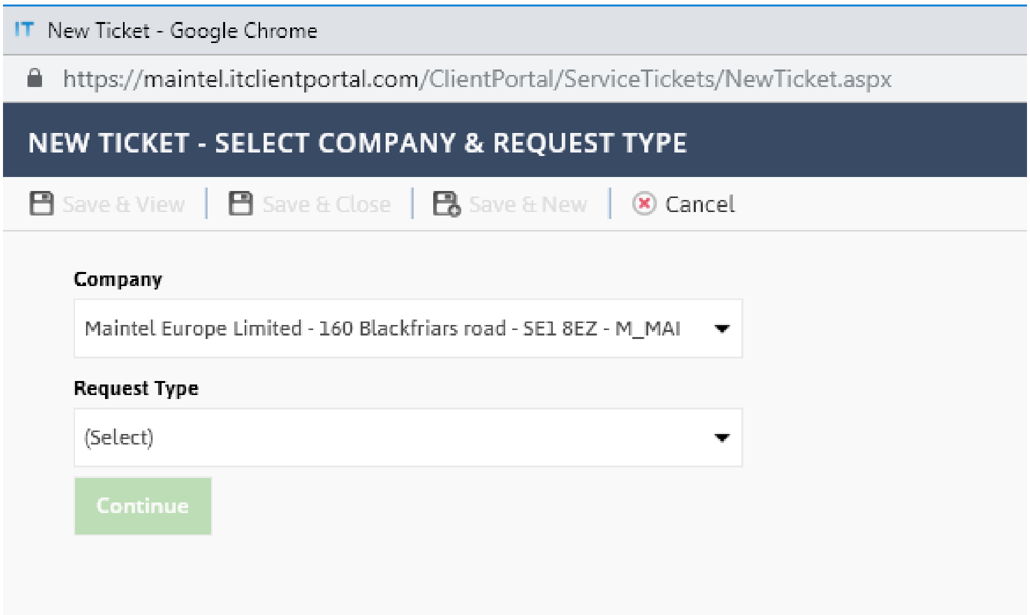
Choosing **"Save & Attach File"** will complete the ticket logging process and open the **"New Ticket Attachments"** form. You can add any attachments you want to send to Maintel, tagging them with a **"Name"** and then using the **"Choose File"** option to select the files:



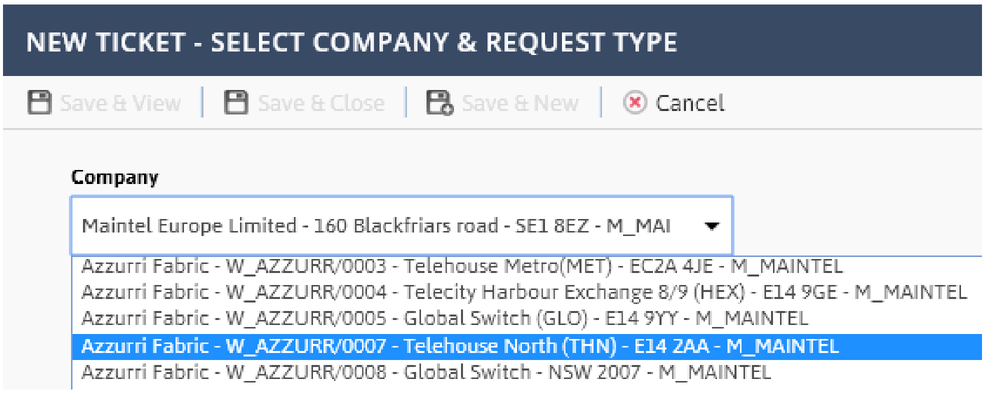
Once you have attached any required files, click on **"Save & Close"** to complete the process.

Logging a New Query Ticket

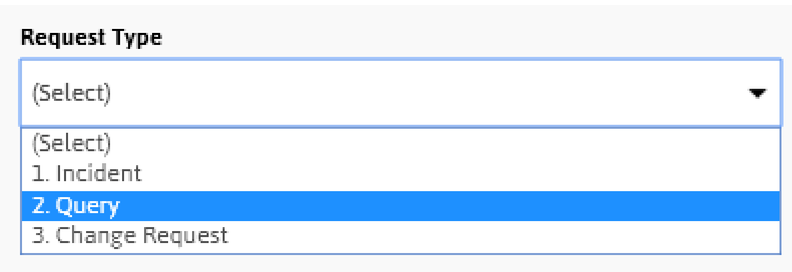
To log a new Query Ticket, click on the **"New Ticket"** option as previously described, and you will be presented with a new ticket pop-up window:



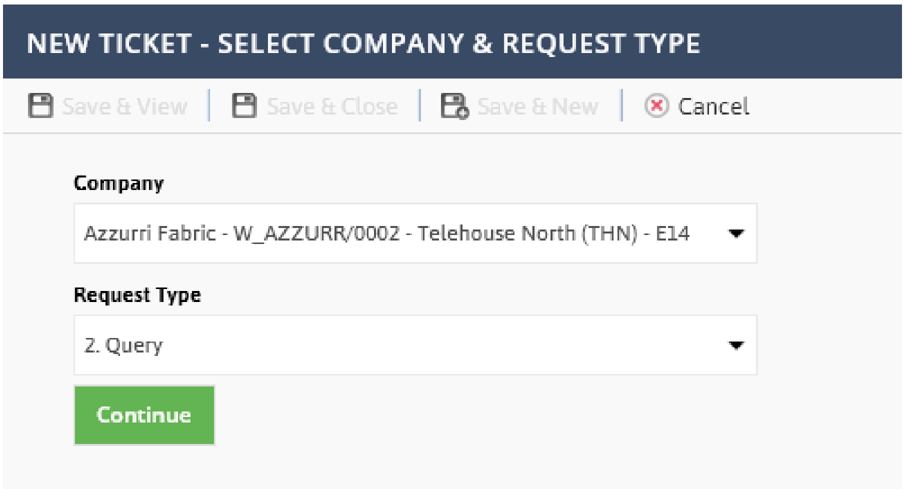
The first step is to choose the site (named within the system – **"Company"**) you would like to report the Query against by selecting the relevant record from the drop-down menu:



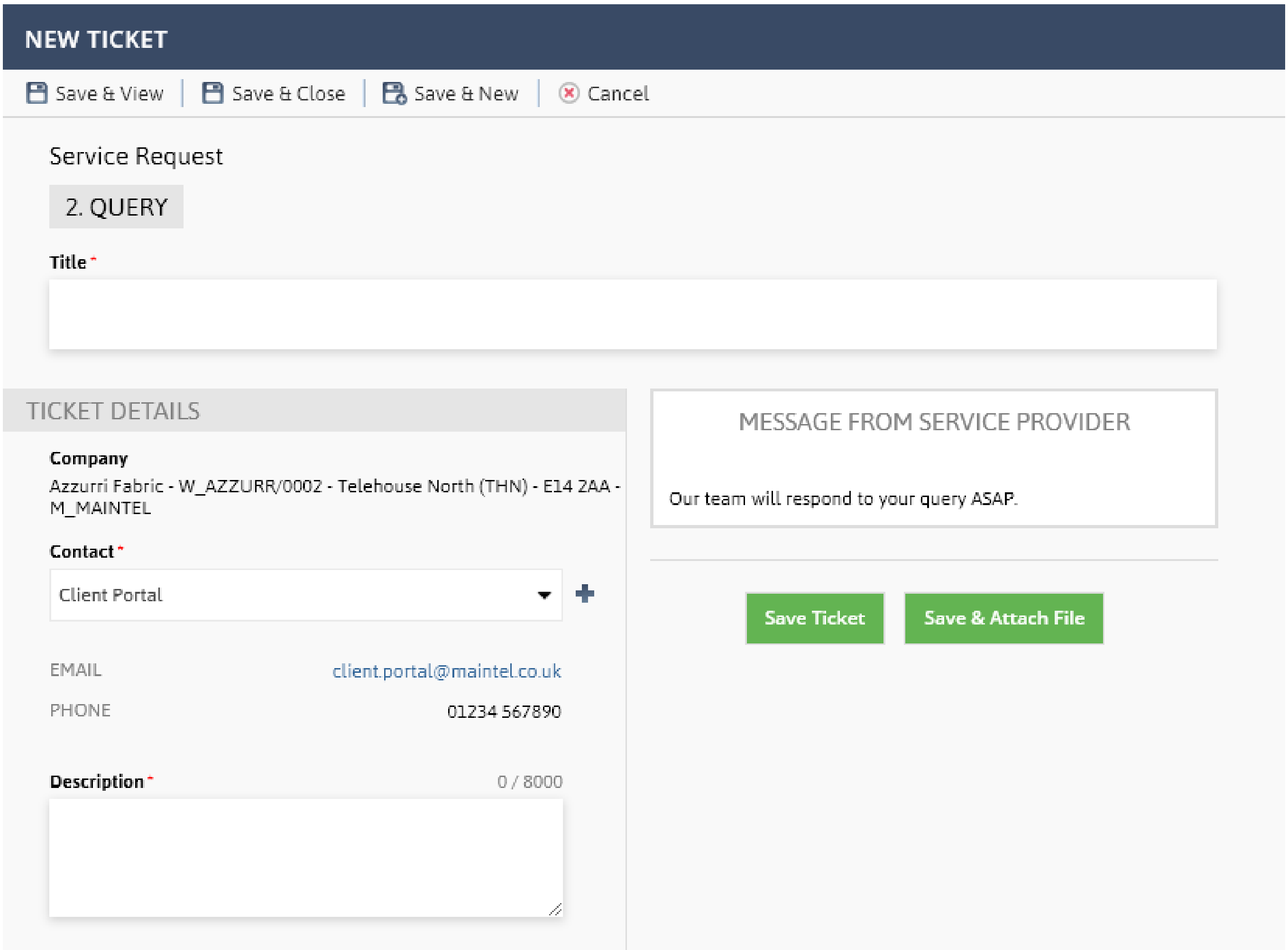
The next step is to choose the **"Request Type"** from the drop-down list, in this case we are logging a Query hence make the selection **"2. Query"**:



When you have made your selection, click on the **"Continue"** button to move onto the next step of ticket logging:



You will then be presented with the main **"New Ticket"** page (top half shown for illustration):



Within this section the following information is mandatory:

Field Name	Description
Title	Short description of issue you are reporting. Please note this field is used on the Dashboard Search feature.
Contact	The system will provide a default option of logging the ticket against the logged in Client Portal user. However another contact can be chosen, or if you have an Administrator profile, you can add a contact ( ) to your company at this point (see final section of this guide for details on how to carry this out).
Description	Extended description of the issue. Including as much detail in this section will enable our Support teams to process your query efficiently. This field is also used in the Dashboard Search feature.
Customer Reference	Enter a reference number (typically your Query ticket number) which you will be able to quote should we be unable to locate your ticket by our reference number.

When you have completed all the mandatory fields, you have several options to complete the ticket logging process.

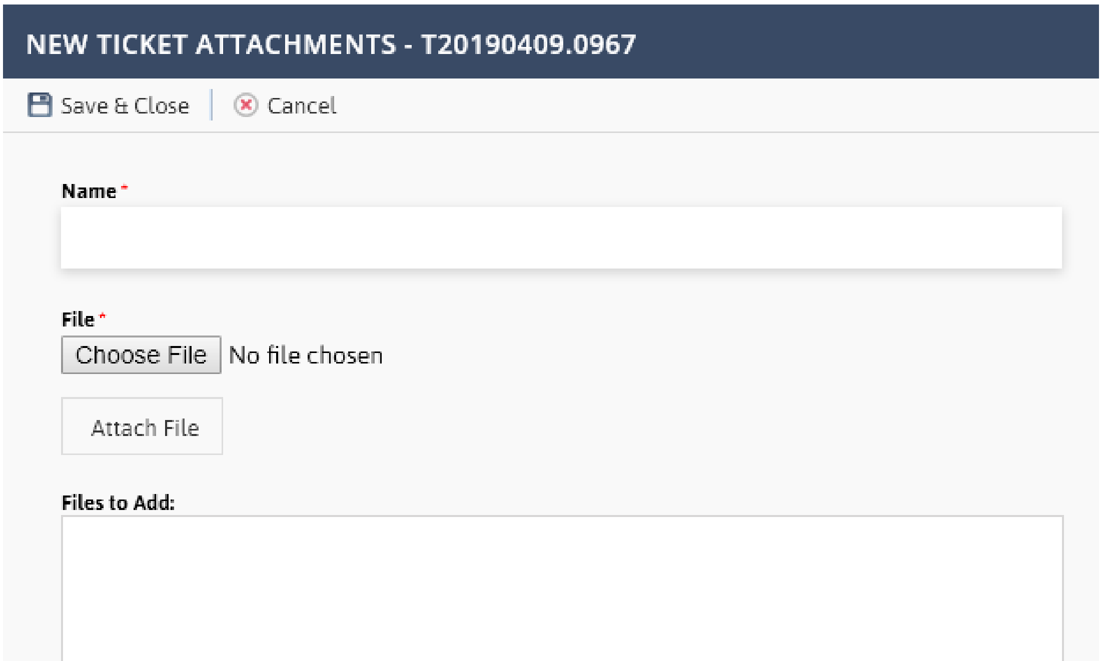
On the top menu bar, you have the options to select **"Save & View"** to submit the ticket and open the record you have created. **"Save & Close"** to commit the ticket and return to the home page or **"Save & New"** to process the ticket and start the ticket logging process again:

Alternatively, selecting the **"Cancel"** button will close the New Ticket page without submitting your ticket.

There are also 2 buttons on the main call logging screen where you can complete the ticket logging process:

Selecting the **"Save Ticket"** option will submit the ticket and open the record you have created for you to view.

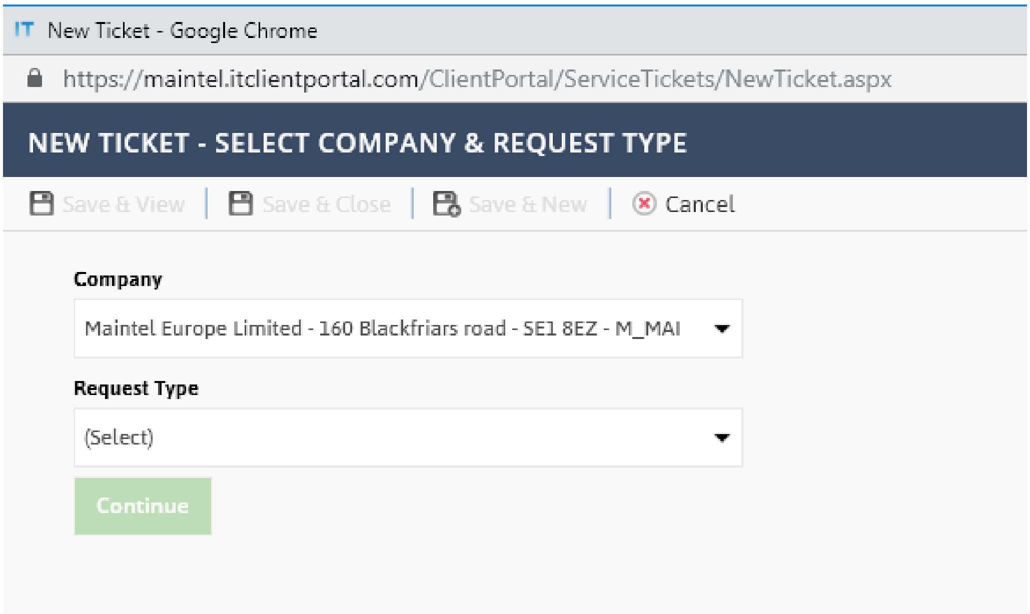
Choosing **"Save & Attach File"** will complete the ticket logging process and open the **"New Ticket Attachments"** form. You can add any attachments you want to send to Maintel, tagging them with a **"Name"** and then using the **"Choose File"** option to select the files:



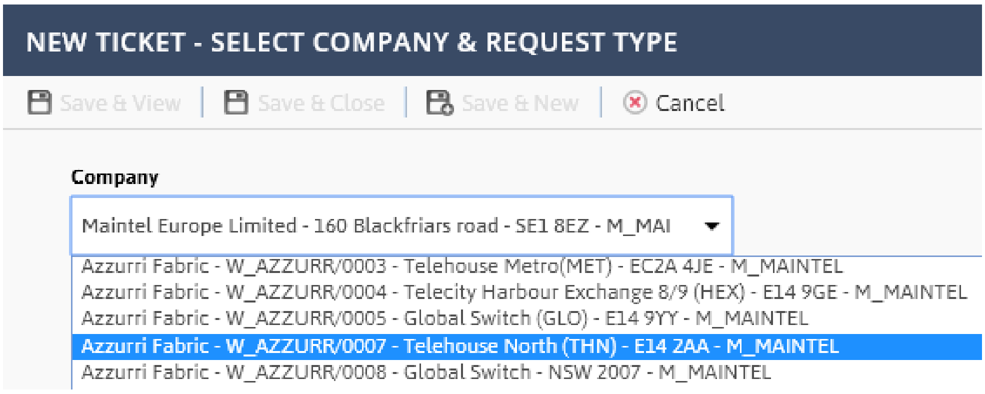
Once you have attached any required files, click on **"Save & Close"** to complete the process.

Logging a New Change Request Ticket

To log a new Change Request Ticket, click on the **"New Ticket"** option as previously described, and you will be presented with a new ticket pop-up window:

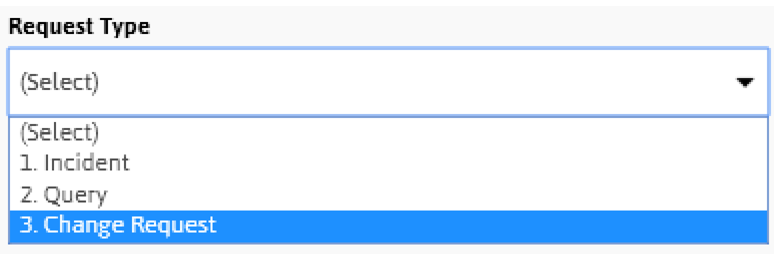


The first step is to choose the site (named within the system – **"Company"**) you would like to report the Change Request against by selecting the relevant record from the drop-down menu:

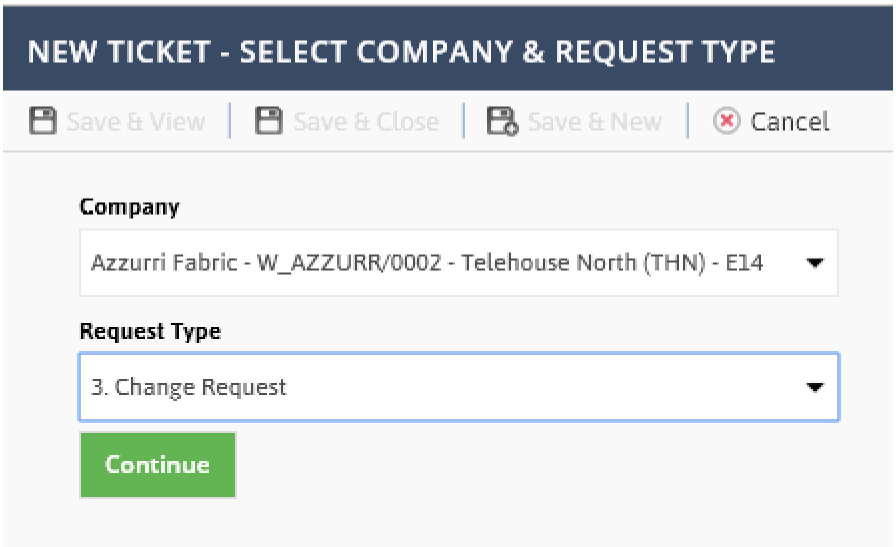


<u>It is important to choose the correct site when logging a Change Request as the system will limit the choice of Configuration Items you are allowed to select based on the site selected at this point.</u>

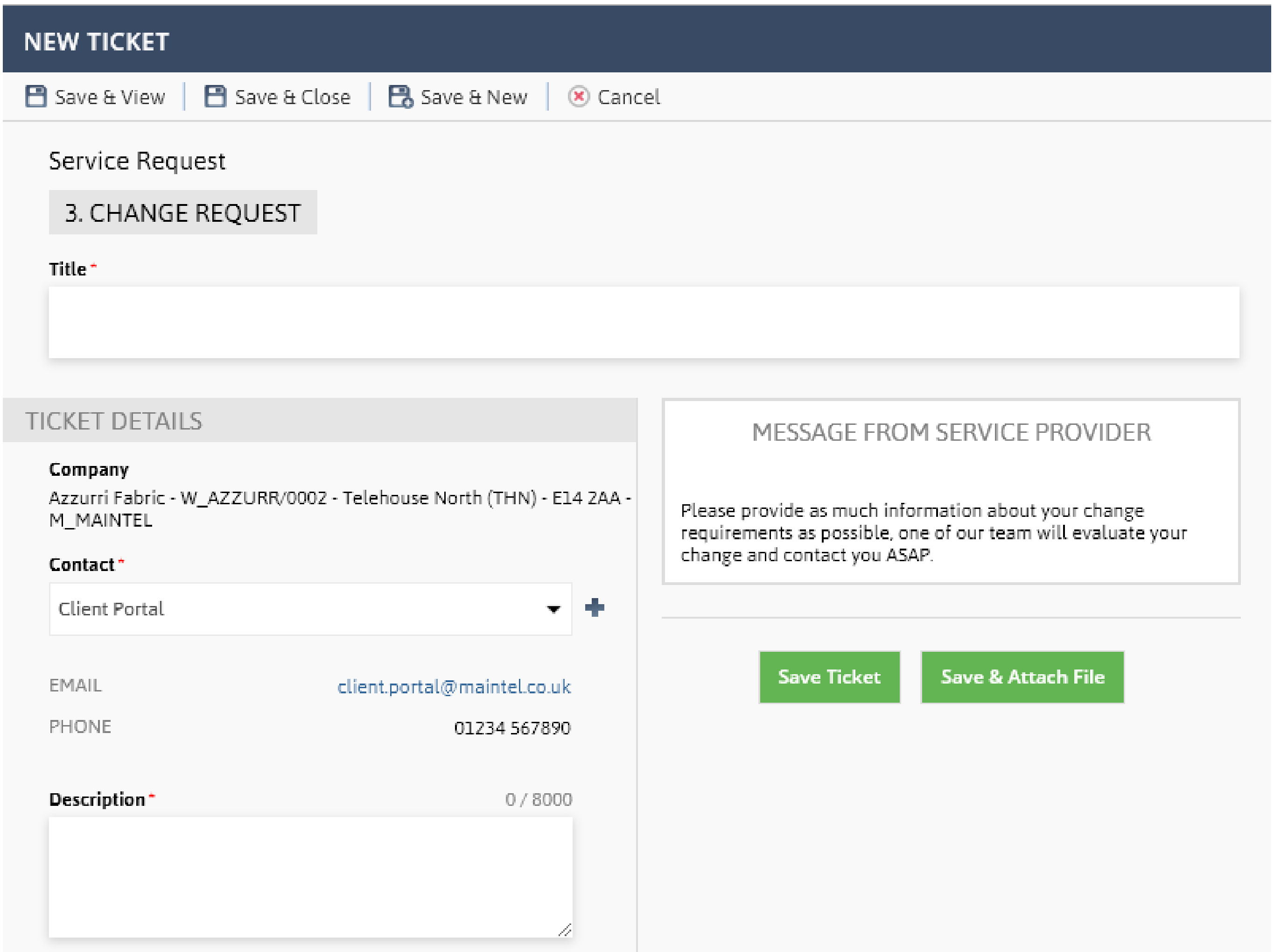
The next step is to choose the **"Request Type"** from the drop-down list, in this case we are logging a Change Request hence make the selection **"3. Change Request"**:



When you have made your selections, click on the **"Continue"** button to move onto the next step of ticket logging:



You will then be presented with the main **"New Ticket"** page (top half shown for illustration):



Within this section the following information is mandatory:

Field Name	Description
Title	Short description of change you are requesting. Please note this field is used on the Dashboard Search feature.
Contact	The system will provide a default option of logging the ticket against the logged in Client Portal user. However another contact can be chosen, or if you have an Administrator profile, you can add a contact ( ) to your company at this point (see final section of this guide for details on how to carry this out).
Description	Extended description of the change. Adding as much detail in this section will enable our support teams to process your Change Request efficiently. This field is also used in the Dashboard Search Feature.
Configuration Item	You will need to choose a supported Configuration Item or Service against the site you have selected by opening the selection tray ( ) and browsing for the relevant item from the list presented.
Customer Reference	Enter a reference number (typically your change ticket number) which you would be able to mention back to us should we be unable to locate your ticket by our reference number.
Customer Req. Date	To provide Maintel with a guide to when you require any changes to be made, please enter the date that the change is required in this field. *Please note: This date will not override any agreed Service Level Agreements in place.*

When you have completed all the mandatory information needed, you have several options to complete the ticket logging process.

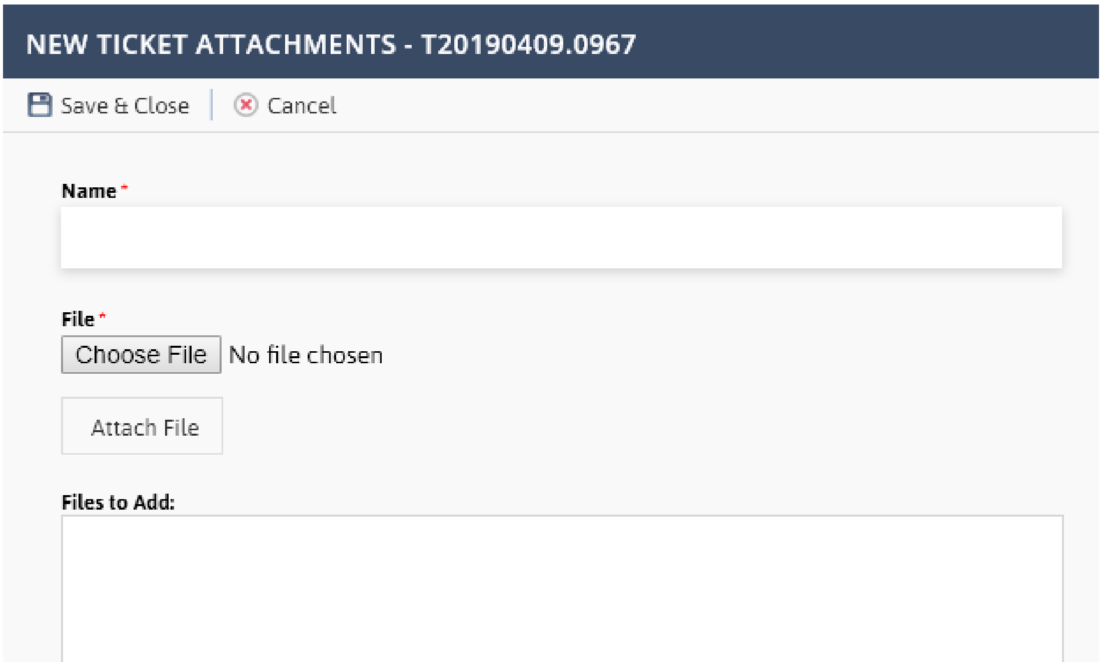
On the top menu bar, you have the options to select **"Save & View"** to submit the ticket and open the record you have created. **"Save & Close"** to commit the ticket and return to the home page or **"Save & New"** to process the ticket and start the ticket logging process again:

Alternatively, selecting the **"Cancel"** button will close the New Ticket page without submitting your ticket.

There are also 2 buttons on the main call logging screen where you can complete the ticket logging process:

Selecting the **"Save Ticket"** option will submit the ticket and open the record you have created for you to view.

Choosing **"Save & Attach File"** will complete the ticket logging process and open the **"New Ticket Attachments"** form. You can add any attachments you want to send to Maintel, tagging them with a **"Name"** and then using the **"Choose File"** option to select the files:



Once you have attached any files needed, click on **"Save & Close"** to complete the process.

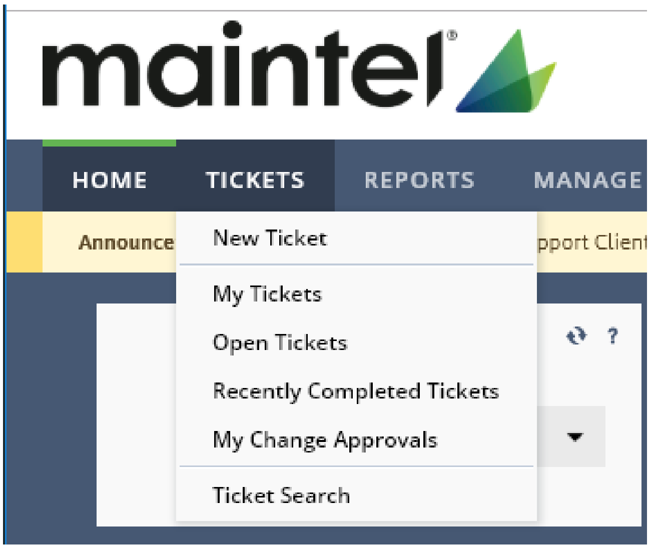
Maintel Support Client Portal – Viewing or Updating an Existing Ticket

One of the most useful features on the Client Portal is the ability to keep track of status and updates posted on your tickets logged with Maintel or add any notes or attachments to open tickets.

Locating an Existing Ticket

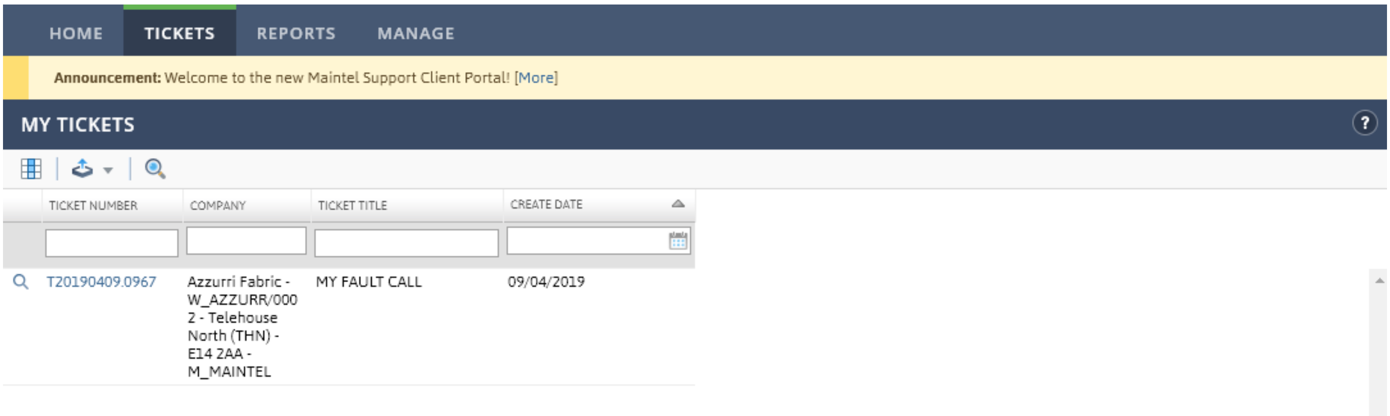
There are several ways to locate existing tickets on the Client Portal. As previously described, you can search for Tickets from the Dashboard home page using the Ticket Number, or search for text in the Title or Description.

Alternatively, you can use one of four options in the **"Tickets"** menu:

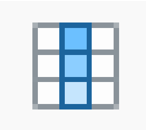


Search Option	Description
My Tickets	Displays the Ticket Search page showing open tickets where the logged in Client Portal user is the ticket contact.
Open Tickets	Displays the Ticket Search page showing all open tickets for your organisation.
Recently Completed Tickets	Displays the Ticket Search page showing all tickets which have been competed in the last 7 days.
Ticket Search	Displays the Ticket Search page showing all tickets for your organisation.

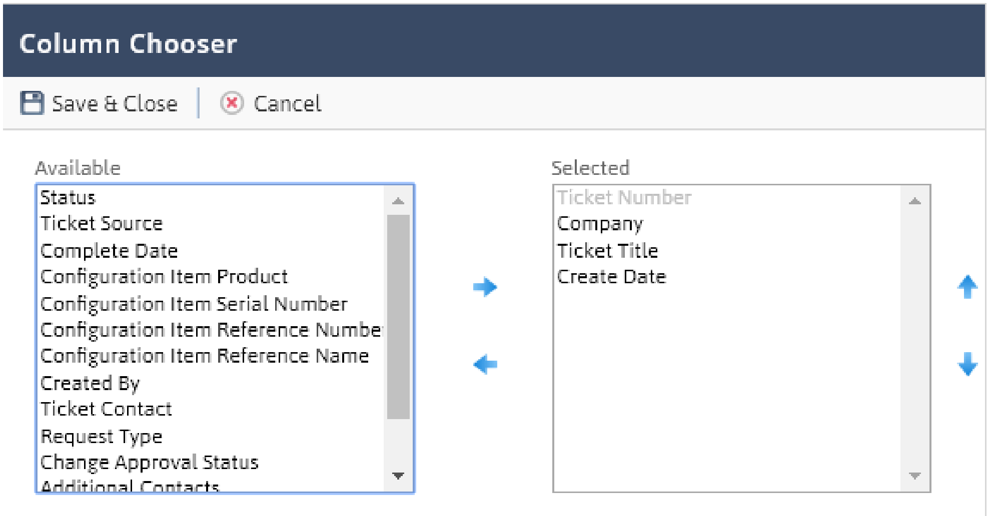
Opening the Ticket Search page using any of the above options presents you with the following screen (**"My Tickets"** view in default settings shown for illustration purposes):



You can configure the ticket information you would like to see in your Ticket Search page by using the Column Chooser option:



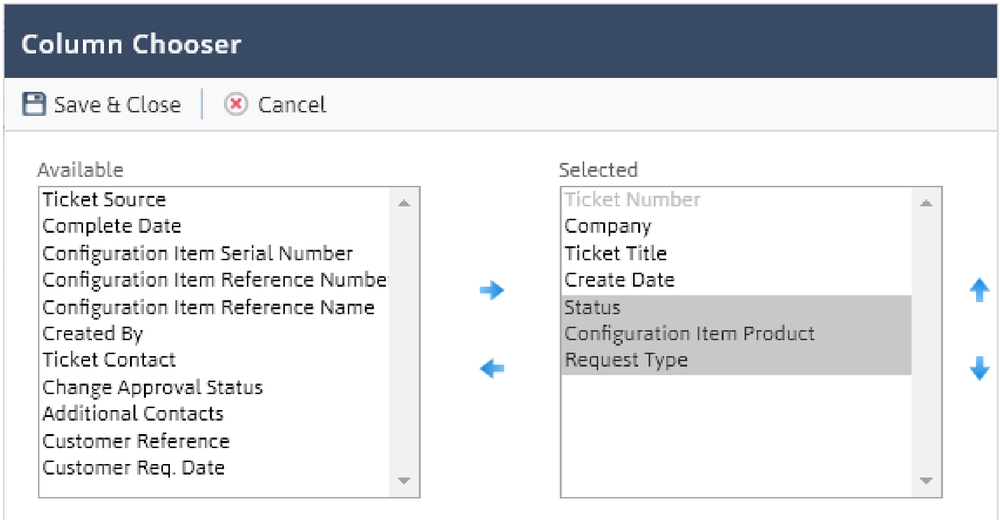
This will show an options list where you can customise the fields shown in the Ticket Search page results grid:



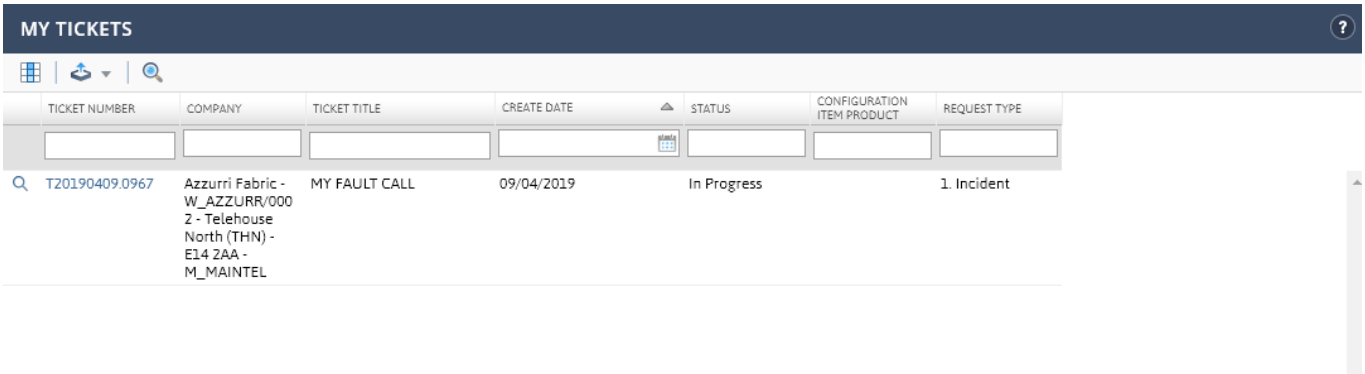
You can use the blue **"Left"** and **"Right"** buttons to add or remove columns or the blue **"Up"** and **"Down"** buttons to reorder the columns on the screen. When you have made your selections, click on **"Save & Close"** to affect the changes and return to the Ticket Search page results.

Please note, the Ticket Number column is mandatory and cannot be removed.

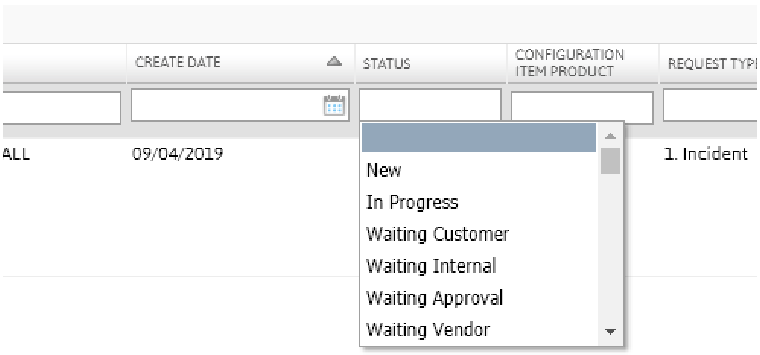
For example, selecting and adding the “Status”, “Configuration Item Product” and “Request Type” columns as per the below:



Will result in the Ticket Page Search being presented in the following format:



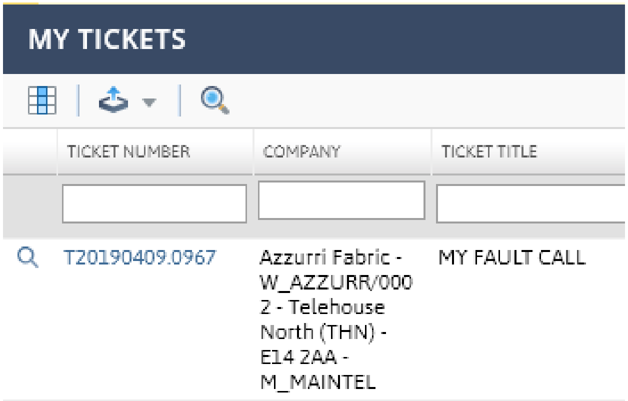
The columns selected can be used as filter results within the page – some Column Headers being drop-down lists and some being text string searches. For example:



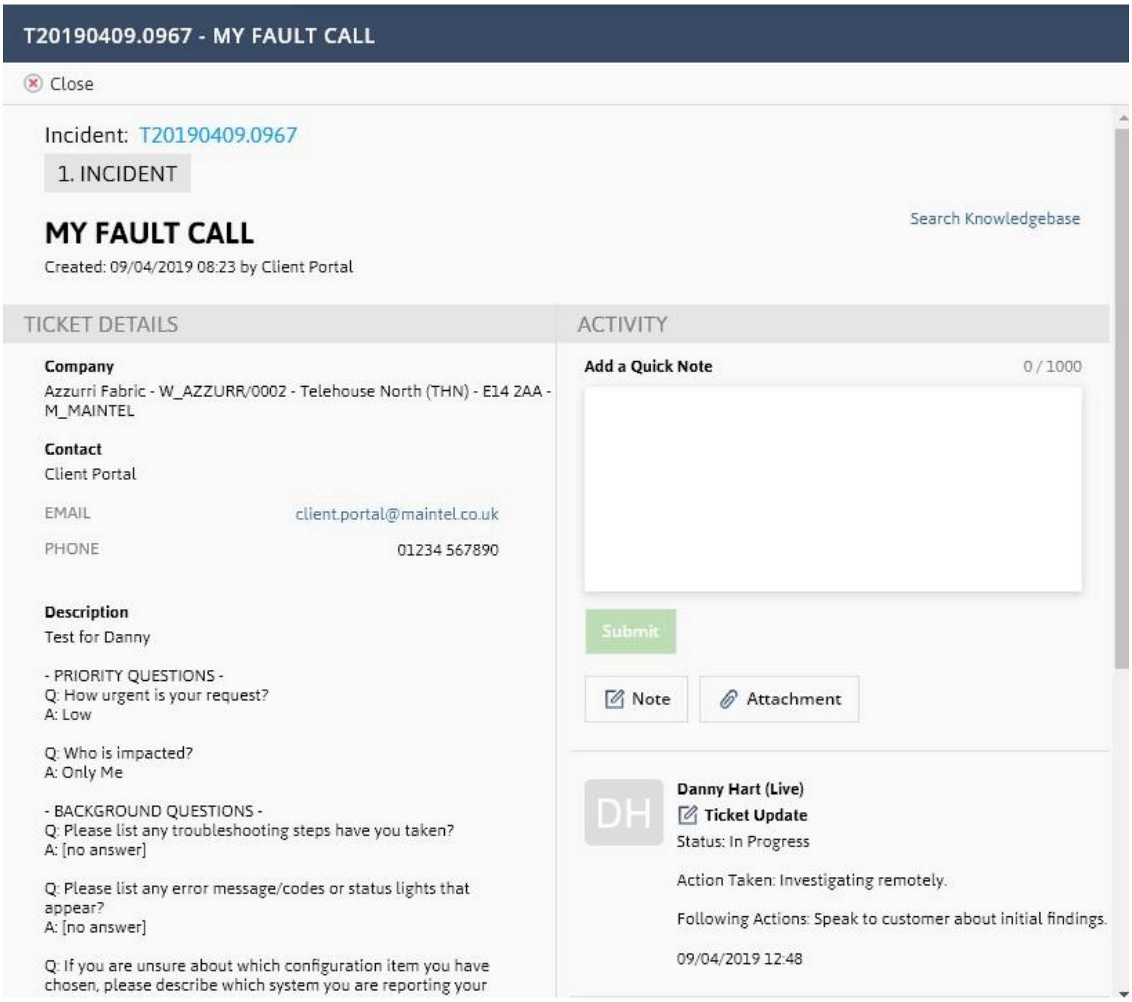
Your selected options will be saved and replicated to all Ticket Search pages, meaning you will only need to carry out this operation once.

Viewing Maintel Support activity on an Existing Ticket

When you have found the ticket you would like to view, click on the Ticket Number hyperlink or the magnifying glass button at the left-hand side of the record:

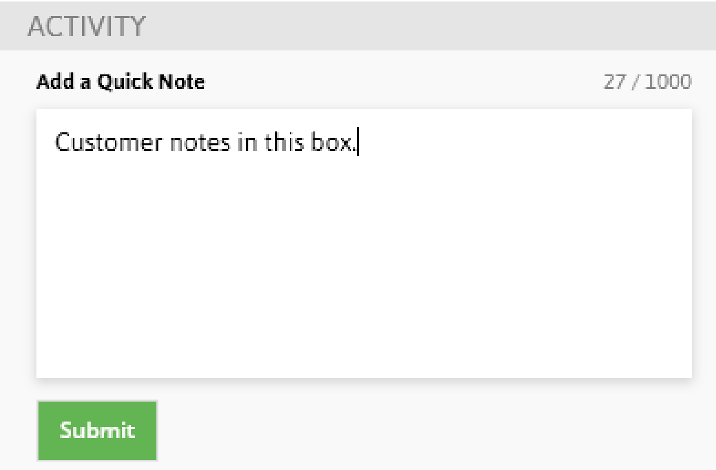


This will open the main ticket page; all ticket updates are shown on the right-hand side of the main page in the **"Activity"** section as shown below:

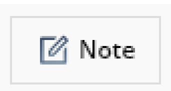


Adding a Note to an Existing Ticket

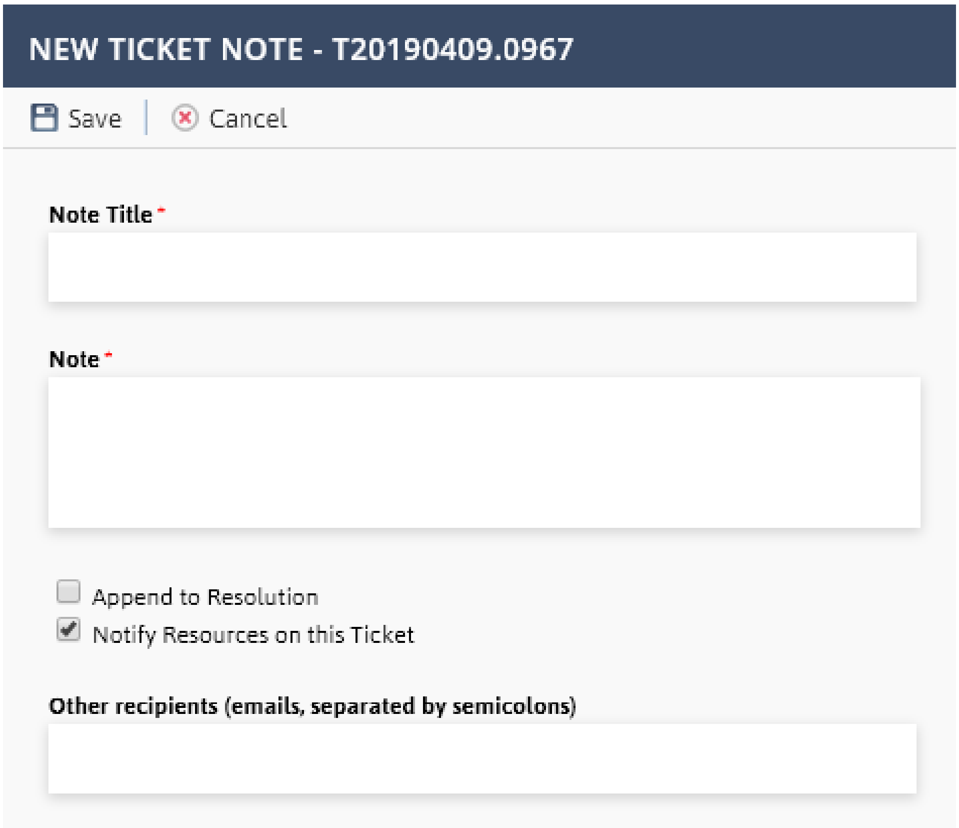
There are two options to add a note to an existing ticket. You can enter the details you would like to add to the **"Add Quick Note"** section and choose **"Submit"**:



Or you can click on the **"Note"** button:



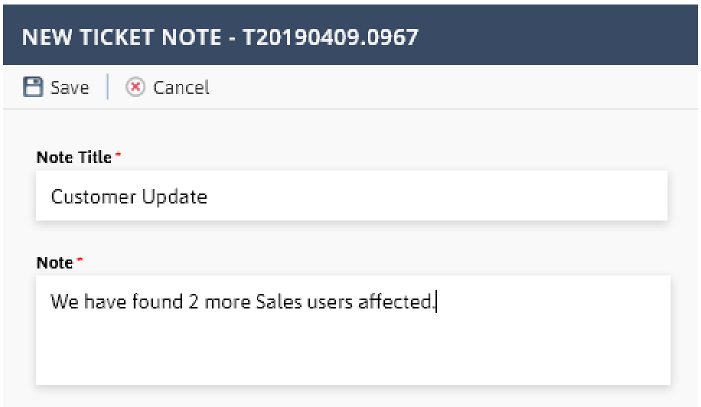
Which will show the following "New Ticket Note" form:



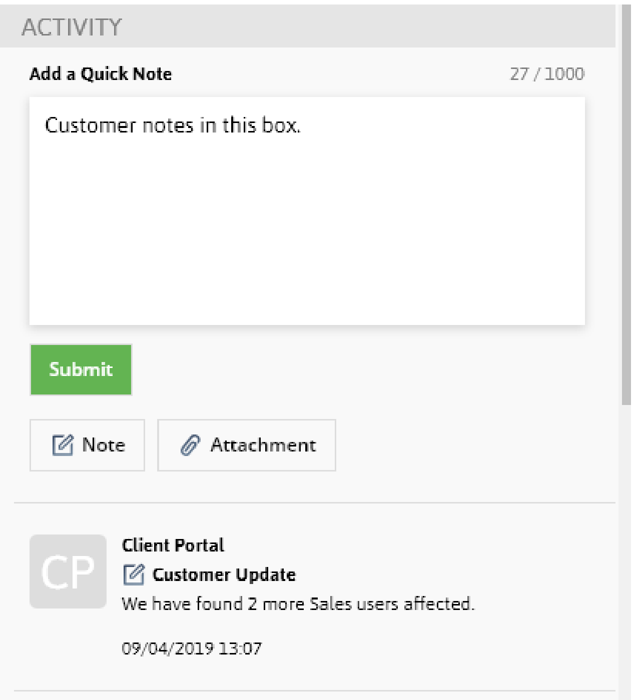
In this section you can add a Note Title, the Note detail and choose one of the following additional actions:

Additional Action	Description
Append to Resolution	Adds the notes you have entered to the tickets and includes the note detail in the **'Resolution'** section of the ticket. This contains the actions taken to complete the ticket.
Notify Resources on this Ticket	Choosing this option will send a notification email to the Maintel resource assigned to the ticket informing them that an update has been added.
Other recipients	You can manually add other email recipients to receive the notification email if you wish.

Once you have completed adding your notes and selected any required options, click on the "**Save"** button to add the note to the call:



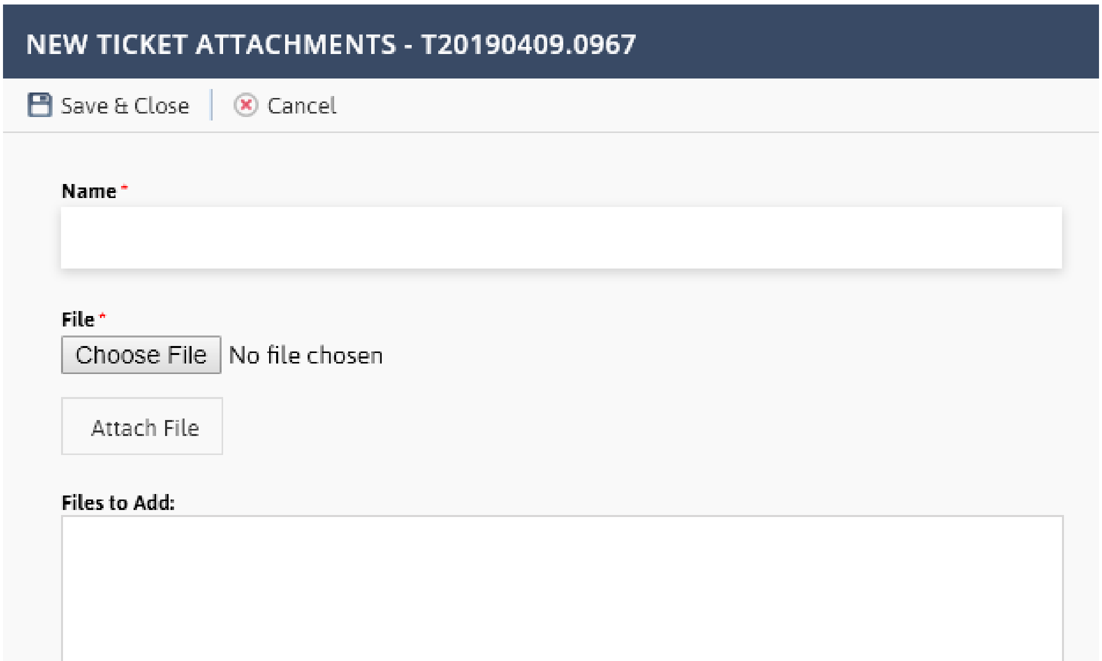
You will then be able to see the update in the main Ticket page:



Adding an Attachment to an Existing Ticket

You can add an attachment by clicking on the **“Attachment”** button in the “Activity” section:

This will open the **“New Ticket Attachments”** form. You can add any attachments you want to send to Maintel, tagging them with a **“Name”** and then using the **“Choose File”** option to select the files:

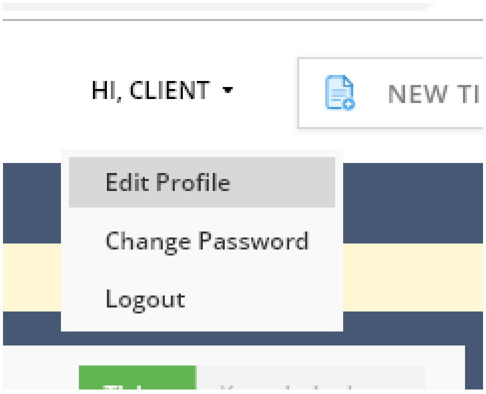


Once you have attached any required files, click on **“Save & Close”** to complete the process.

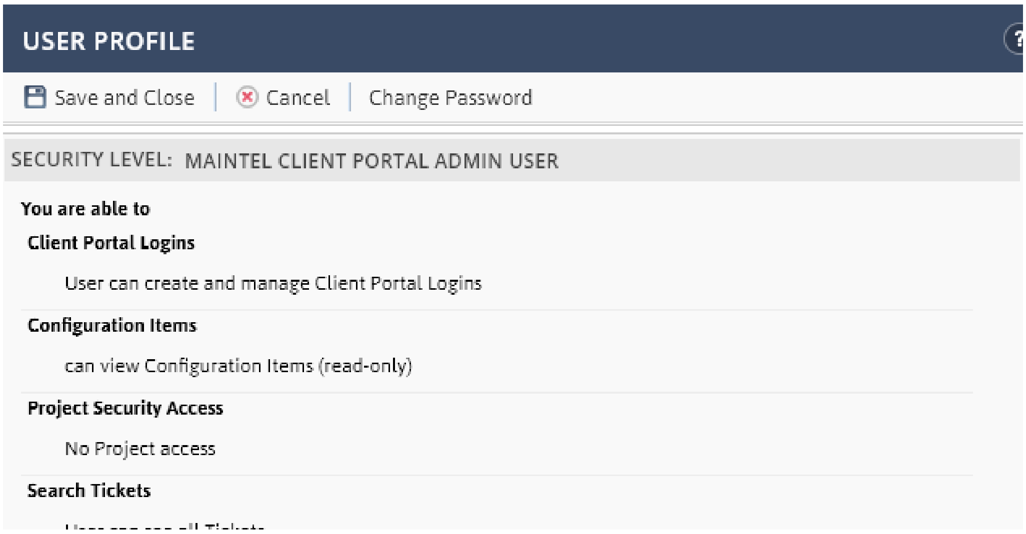
Maintel Support Client Portal – Managing your Customer Contacts

A new feature of the Maintel Support Client Portal is the option for you to manage your own Customer Contacts. You can add new and modify existing contacts, as well as activate or deactivate Client Portal access for your contacts.

To be able to use this feature you need to be set with the Security Level **“Maintel Client Portal Admin User”**. To view your current security level, drop down the menu next to the **“Hi, <Name>”** text on the top menu section and choose **“Edit Profile”**.



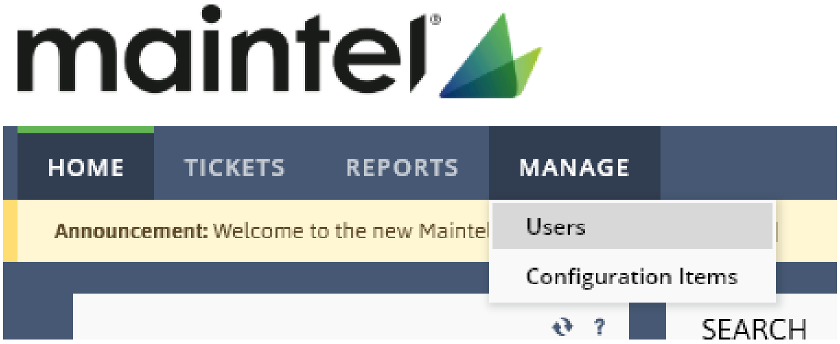
This will open a pop-up window where you can view your current Security Level:



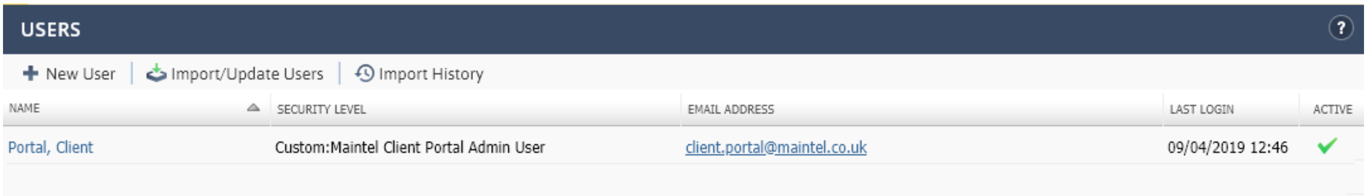
Should you require your Security Level to be changed, either liaise with a contact from your company who is a Client Portal Admin user or contact Maintel through the details in the first section of this document.

Adding a Contact

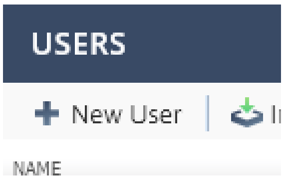
To add a new contact to your organisation, from the Main Menu bar, hover on the **"Manage"** tab and choose **"Users"**:



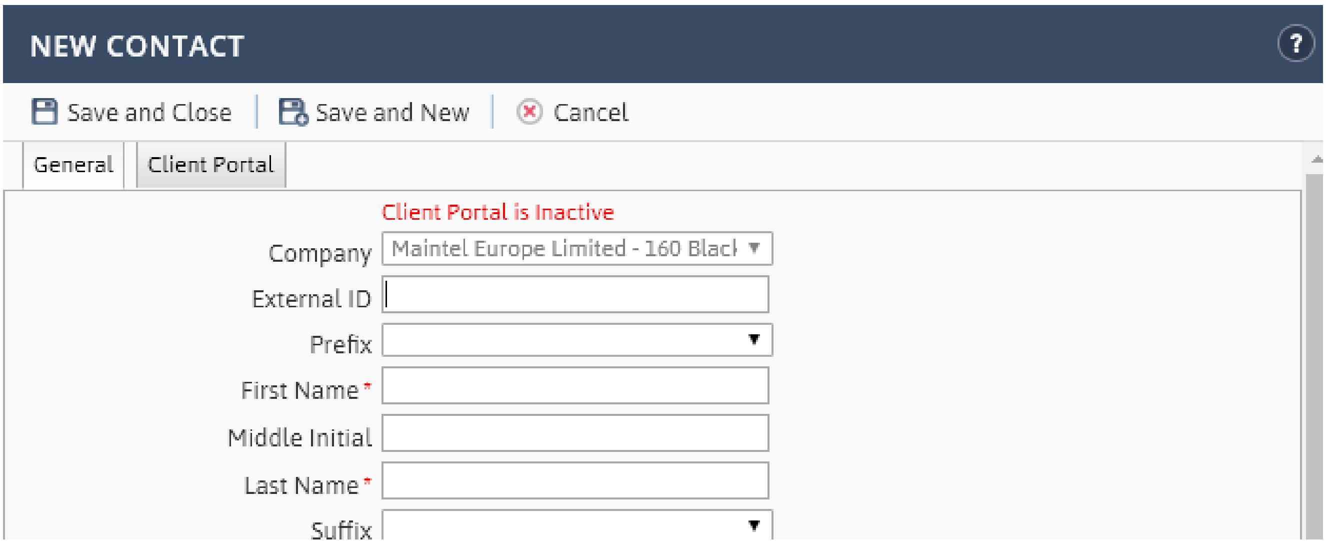
This will open a list of users currently entered into the system as per the following:



To add a new user, select the **"+ New User"** button:



This will open the **"New Contact"** form to be completed:



You will need to complete the following Mandatory Fields:

Mandatory Fields
First Name
Last Name
Email Address

The following list of fields is optional, however adding as much information as possible will assist Maintel Support staff in contacting you.

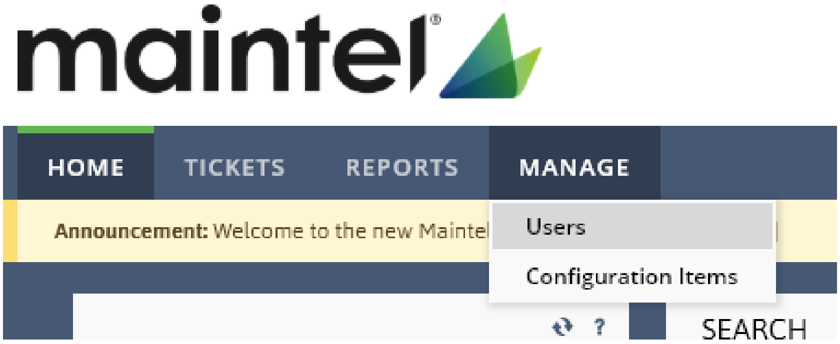
Optional Fields	Notes
External ID	Not in use at present, please do not use.
Prefix	
Middle Initial	
Last Name	
Suffix	
(Job) Title	
Primary Outsourced Contact	Not in use at present, please do not use.
Address	All these fields will be pre-populated with your Main Location details.
City	
Post Code	
Country	
Additional Address Information	
Email Address 2	
Email Address 3	
Phone / Extension	
Alternate Phone	
Mobile Phone	
Fax	

When you have entered the mandatory information and provided any additional contact details, click on **"Save and Close"** to complete the process or click on **"Save and New"** to add another contact.

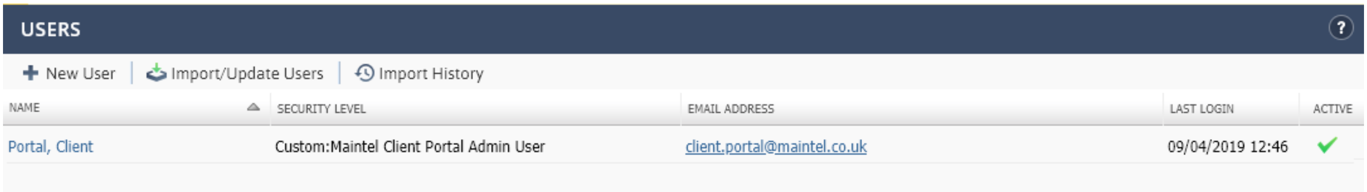
To activate Client Portal access for the contact you have created, click on the **"Client Portal"** tab and follow the instructions in the section of this document 'Allowing a Contact Access to the Maintel Support Client Portal'.

Editing an Existing Contact

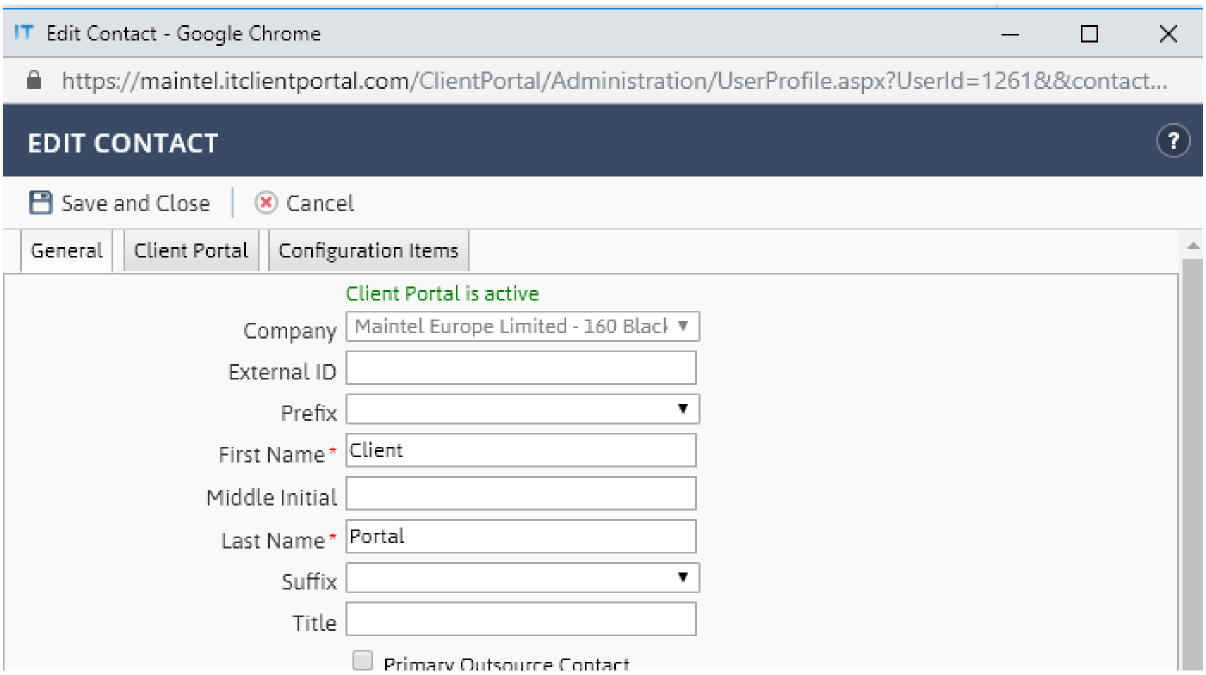
To edit an existing contact in your organisation, from the Main Menu bar, hover on the **"Manage"** tab and choose **"Users"**:



This will open a list of users currently entered into the system as per the following:



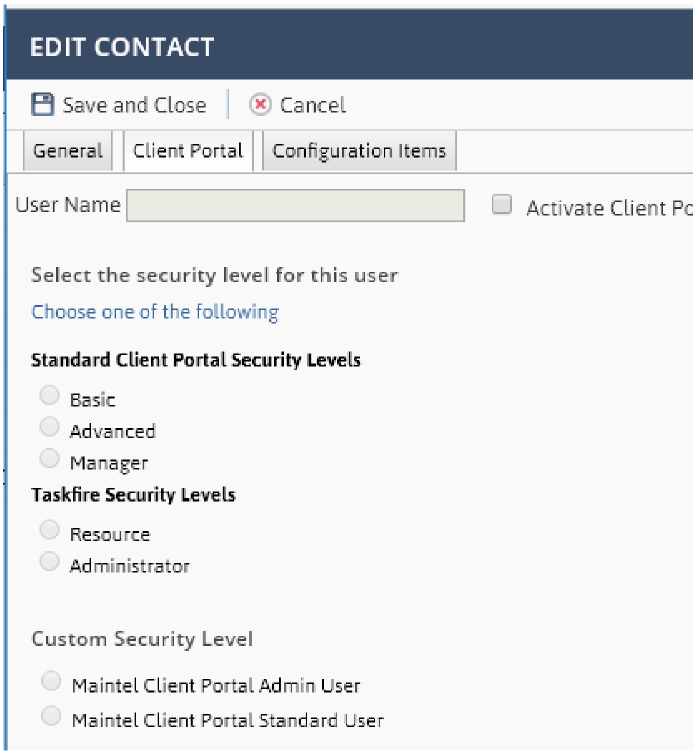
To edit a user, click on the relevant Name record on the left-hand side of the table. This will open the **"Edit Contact"** form as per the following:



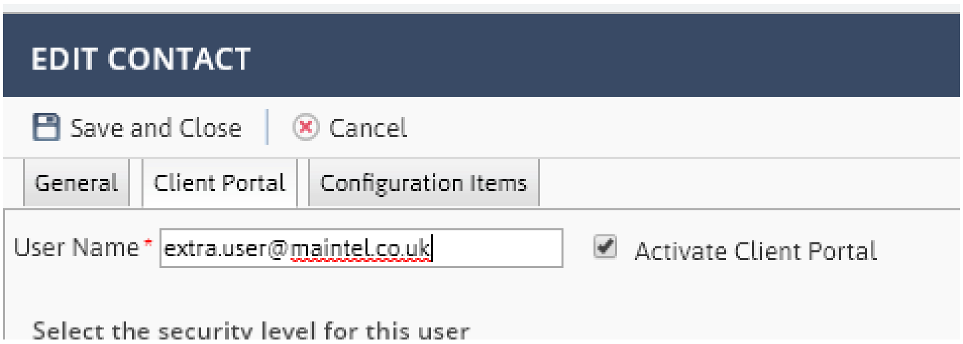
Within this page you can edit any of the fields, bearing in mind the Mandatory fields can be changed but cannot be left blank.

Allowing a Contact Access to the Maintel Support Client Portal

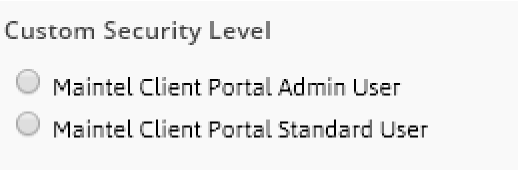
You can allow access to the Maintel Support Client Portal for any of the contacts in your organisation, either from Creating a New Contact or Editing an Existing Contact as described previously. Choose the **“Client Portal”** tab as shown below:



You need to tick the box “Activate Client Portal”, this will automatically populate the User Name with the contact’s primary email address:



The final step is to select a Security Level for the Client Portal user you are activating:



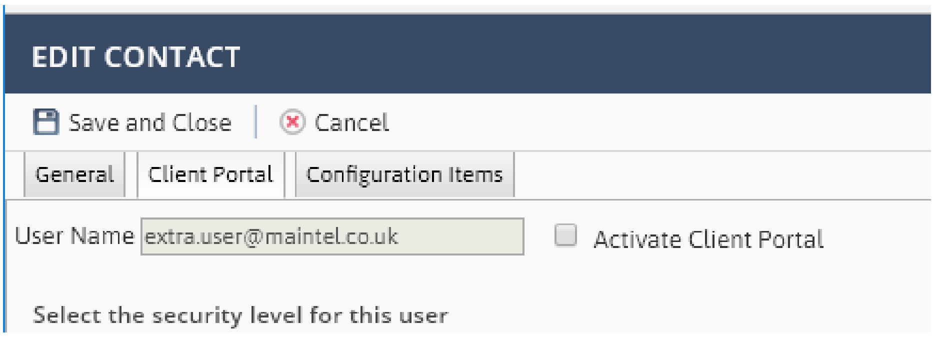
The details of the Custom Security Levels available are as follows:

Security Level	Access Details
Maintel Client Portal Standard User	View Configuration Items (Read Only) No Project Access (feature to be released in future phase of development) User can see all Tickets User can view and edit their own profile User is able to create new Service Requests (All Ticket Types)
Maintel Client Portal Admin User	View Configuration Items (Read Only) No Project Access (feature to be released inf future phase of development) User can see all Tickets User can view and edit their own profile User is able to create new Service Requests (All Ticket Types) User can create and manage Customer Contacts and Client Portal logins.

Once you have selected the relevant Security Level choose "Save and Close" from the top menu bar. The activated contact will receive an automated email from our system with their login credentials. Please ensure that you check junk and filtered inboxes for the sender address: **donotreply@maintel.co.uk** if you do not receive the mail.

Deactivating Maintel Support Client Portal Access

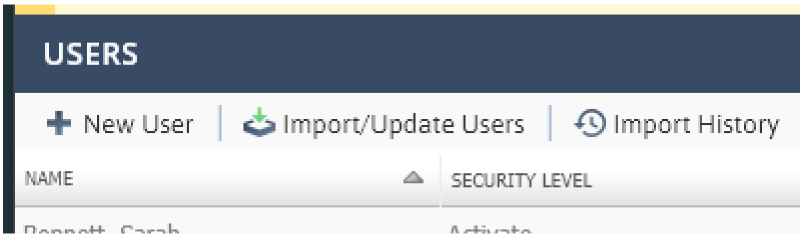
Should the need arise to deactivate a contact's Client Portal access, follow the previous steps to edit a contact and simply uncheck the **"Activate Client Portal"** tickbox as per the following:



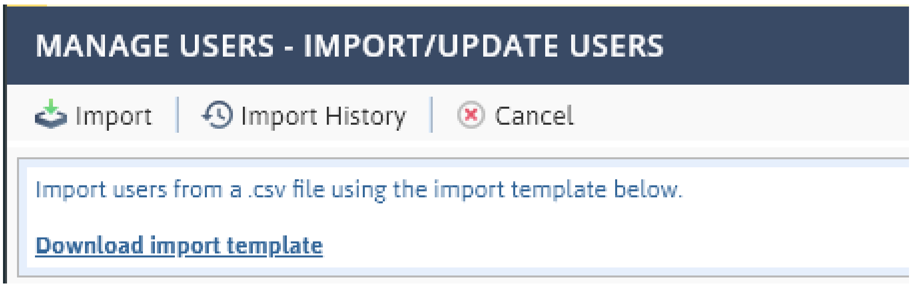
Click on **"Save and Close"** to compete this operation.

Managing Contacts in Bulk

Admin users are also able to manage Contacts and/or Client Portal users in bulk using the **"Import/Update Users"** feature within **"Users"**:

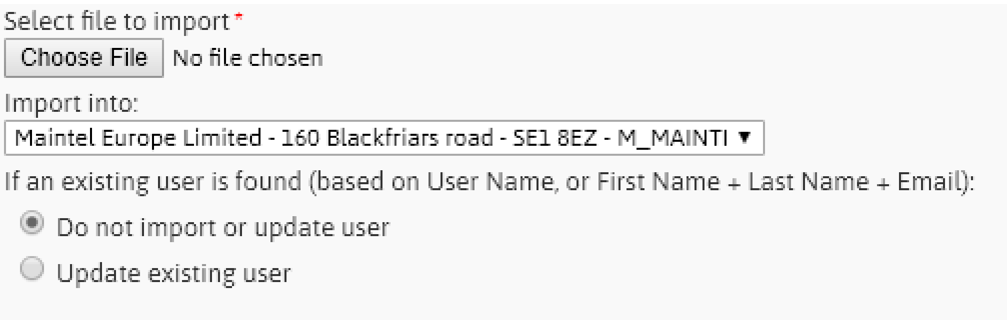


From this page you will need to click on the link to **"Download import template"** as per the below:

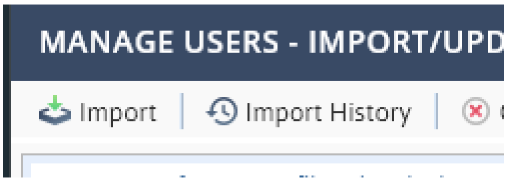


This will download a pre-populated .csv (Comma-Separated Value) file which can be edited in spreadsheet programs like Microsoft Excel or similar. The template contains all the mandatory and optional fields described in the 'Adding a Contact' section of this document.

When you have entered the information into the template and saved the file, you will need to use the **"Choose File"** option to select the completed template. Choose the site you want to import the contacts into (this will default to your Organisation's main location) and choose an option to either **"Update existing user"** or **"Do not import or update user"** if an existing contact is found.



When completed, click on the **"Import"** button as shown below:



You can view any previous import operations by selecting the **"Import History"** button as per the above.

Managing Client Portal Access in Bulk

Should you wish to bulk add or edit users and activate Client Portal access, you must ensure that the following fields are completed in the Contact Import Template .csv file:

Column W – Client Portal Username. This field needs to be populated with the contact's email address.

Column Y – Client Portal Security Level. This field needs to be populated with one of the following options and must be entered **verbatim:**

Column Y – Client Portal Security Level
Maintel Client Portal Standard User
Maintel Client Portal Admin User

Please note: Column X – Client Portal Password needs to be left blank, the system will automatically generate a password.

All users created in this manner will receive the automated Client Portal welcome email with their login credentials included.