



Customer Portal Training

Student Guide

Version 1.0

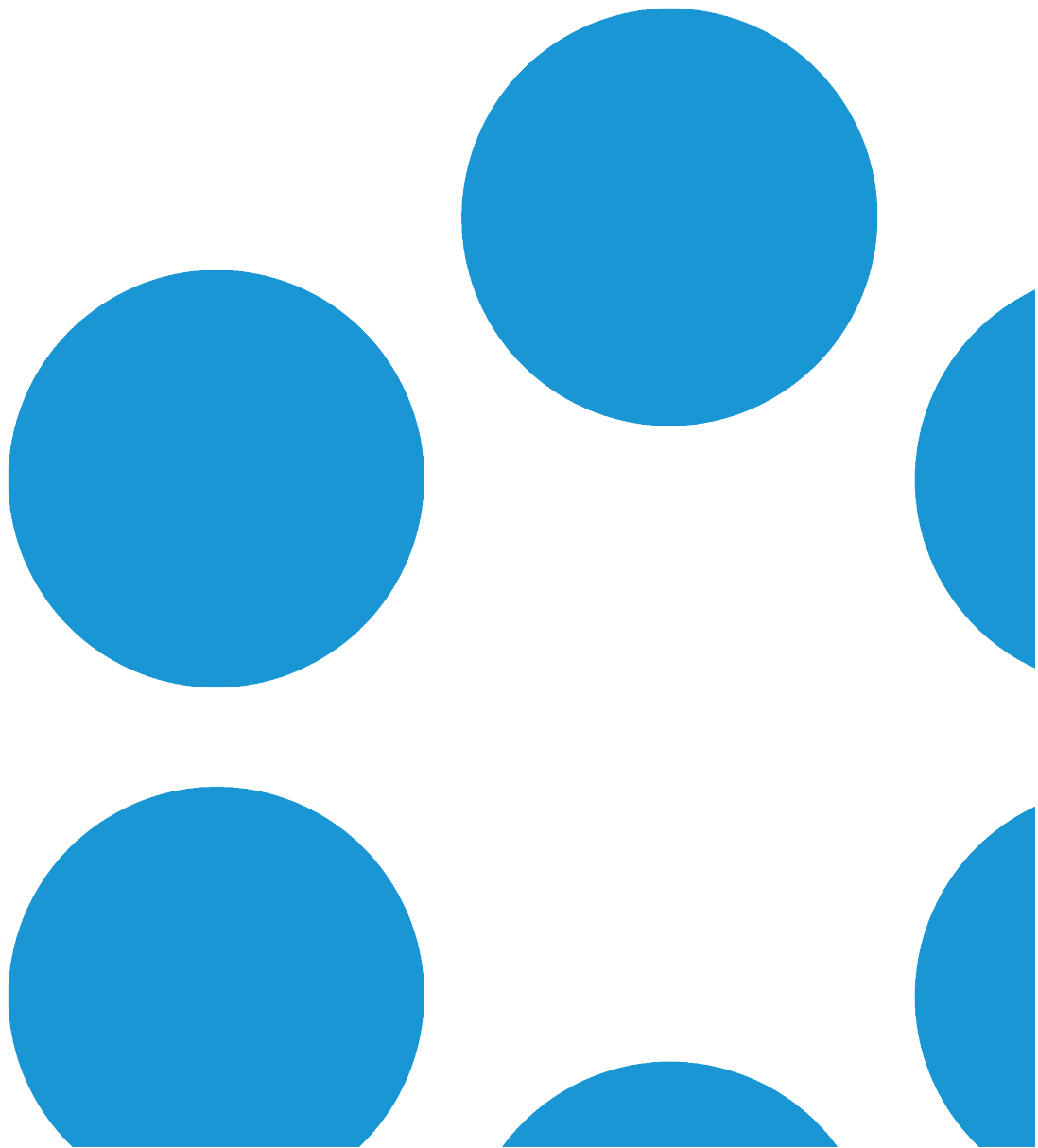




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About the Guide

This guide is structured so that you get the most out of your learning experience. Each module includes the module objectives before setting out the concepts in detail. Workshop exercises and review questions may also be included.

The concepts are delivered by the instructor either by discussion or demonstration. You will have the opportunity for some hands on experience with short tasks.

The manual is intended as a learning resource, and is yours to keep after the training is completed.

As vFire Core is highly configurable, the screen examples may differ from your installation.



Version Details

Version Number	Date	Change Description
1.0	9 March 2016	Initial Version

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About the Course

Course Outline

Course Overview	This course is an introduction to the 9.3.0 release of vFire Core, including enhancements to the Customer Portal
Course Objectives	By the end of this course, you will have an understanding of the new features in 9.3.0, as well as a high level knowledge of how to configure your system to take advantage of the new features and functions
Duration	3.5 hours
Intended Audience	System Administrators
Assumed Knowledge	It is assumed that you have participated in the Designer training course provided by Alemba, or have a thorough understanding of the Designer functionality in vFire Core 9.3.
Related and Recommended Courses	<p>For a full understanding of the concepts covered in this course, and to enhance your understanding and use of the system, we recommend that you also attend the following courses:</p> <ul style="list-style-type: none"> • Designer Training • Advanced Configuration Management <p>Talk to your Alemba Account Manager for more details.</p>

Syllabus

The course contains the following modules:



<p>Styling the Portal</p>	<p>Using skins to change the look and feel of your customer portal; creating a skin; changing colors; adding a custom logo</p> <p>Exploring how you can change the order and options in your My Options menu pane; creating a My Options menu; configuring the selected options; creating a custom option</p> <p>Exploring the differences between the default and classic home page displays; choosing a display</p>
<p>Page Forms</p>	<p>Modifying forms using dynamic logic and filtering logic</p>
<p>Service Catalog</p>	<p>How it works; promoted items; quantity and cost configurability; categories; searching in the catalog; icon, label and category changes in service catalog entries</p>
<p>Enterprise Service Management</p>	<p>Configuring a second portal system; making a customer portal system unique using skins, My Options and Home Page views</p>
<p>Searching</p>	<p>Searching in 9.3.0; search as you type; configuring search results; setting search options; using custom fields in a search</p>
<p>Advanced Linking</p>	<p>Configuring advanced links in My Options; pre-populating field values via advanced links; creating links from email to portal; “outside-in” – importing data from intranet or SharePoint</p>



Styling the Portal



By the end of this module, you will be able to:

- Understand the role of skins in the customer portal
- Display different “out of the box” skins
- Create a new skin
- Change key elements, including the displayed logo
- Apply a skin to a customer portal system
- Understand the role of the My Options pane
- Display different “out of the box” My Options panes
- Create a new My Options pane
- Add, remove, rename and reorder menu options
- Create new menu options
- Apply a new My Options menu to your customer portal system
- Understand the difference between Default and Classic Home Page displays
- Choose a preferred Home Page display



The vFire Customer Portal home screen looks like this by default –

Hi Jonathan [Log Out](#)

MY OPTIONS

- Home
- Self Help ▶
- Incidents ▶
- Requests ▶
- Approvals ▶
- Service Catalog ▶
- Configuration Items ▶
- Customer Search
- Self Administration ▶

MY COUNTS

My Incidents	2	My Requests	2
My Approvals	0	My CIs	0

LATEST NEWS

vFire Release
The latest version of vFire is now available for download.

Scheduled Maintenance
There will be scheduled maintenance to the email system between 8pm - 10pm this coming Friday.

[More News](#)

MY INCIDENTS

No.	Description	Log Date	Status
82	When the user sends an...	11/02/2015 09:08	New
83	Problem with my email	11/02/2015 10:04	New

[Search Incidents](#)

MY REQUESTS

No.	Title	Created Date	Status
82	Software	12/02/2016...	New
145	Relocate...	11/02/2015...	Awaiting Implementation

[Search Requests](#)

MY APPROVALS

MY ORDERS

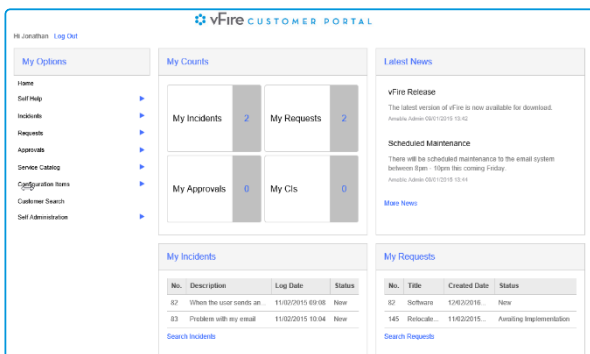
It is made up of a:

- **Page header** at the top of the screen, with a logo and login details
- **My Options pane** down the left hand side, listing all of the available options, including submenus of further options.
- **Widgets pane**, containing a number of blocks or widgets that display key information. You can only see the information that your security role and other permissions allow.



You can configure the customer portal system by creating or updating the:

- **Skin** – this contains settings for the appearance of the customer portal system. It determines the logo that is displayed, fonts, border and background colors for widgets and buttons, as well as various other design features that will create a unique style for your customer portal system.
- **My Options pane** – this determines the menu options that are displayed in the My Options pane, including submenus. You can also choose whether you want the options to pop out when you hover over a submenu, or expand when you click, and create custom options which will send users to specific URLs.



You can also choose whether you want the widgets to be arranged in default format, as fixed size blocks, or in classic format, as a single column, which expands to accommodate the number of entries in each widget.

Configuring the Skin

The skin contains information about the appearance of the customer portal system.

When you install or upgrade to vFire Core 9.3, you are provided with two skins; default and classic.

The default skin looks as illustrated earlier; the classic one looks like this:

The screen elements remain the same, it is simply a different style.

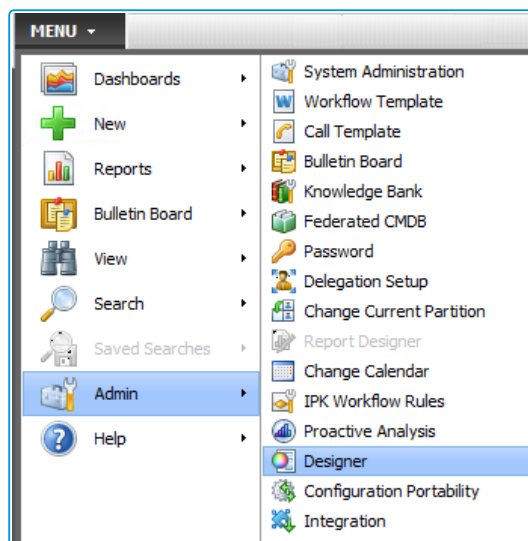


If you are upgrading, and have configured your customer portal system, the default skin will reflect your earlier configurations. If you have several customer portal systems, you will have a skin for each of the customer portal systems, named according to the customer portal system.



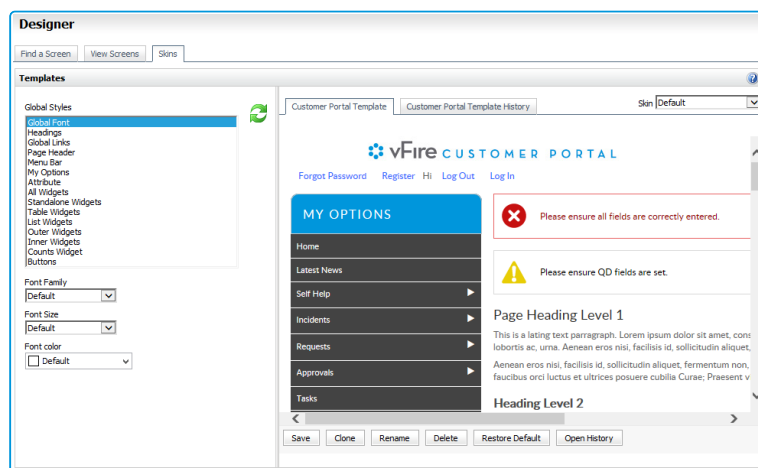
To work with skins, take the following steps:

1. In vFire Core, select **Menu** and then **Admin**. From the submenu, select the **Designer**




option.

2. In the **Designer** window, make the **Skins** tab uppermost.



3. In the left hand pane, you will see a list of all of the elements you can update, and the aspects of those elements you can change.


 For Global Font, you can change the Font Family, Font Size and Font color.

4. The main part of the window displays a preview, so that you can see the effect of your changes.
5. In the top right hand corner of the window, you will see the name of the current skin. Use the drop-down list to see all of the available skins, and then select the one you want to update.





- If you want to create a new skin, select the one that you want to copy, or clone. Then select the button at the bottom of the window, key in the name of the new skin and click OK to see the new skin name appear in the Skin box.


- Select the element you want to modify.

 Widget headers use the Lato font by default. As Internet Explorer's default security settings prevent fonts from being downloaded, the Lato font will appear as Arial font in Internet Explorer unless the default setting is changed. This limitation does not extend to other browsers such as Chrome and Firefox.

- Select the new styles, using the drop down lists.
- To upload a new banner image, select the **Page Header** element and complete the details.

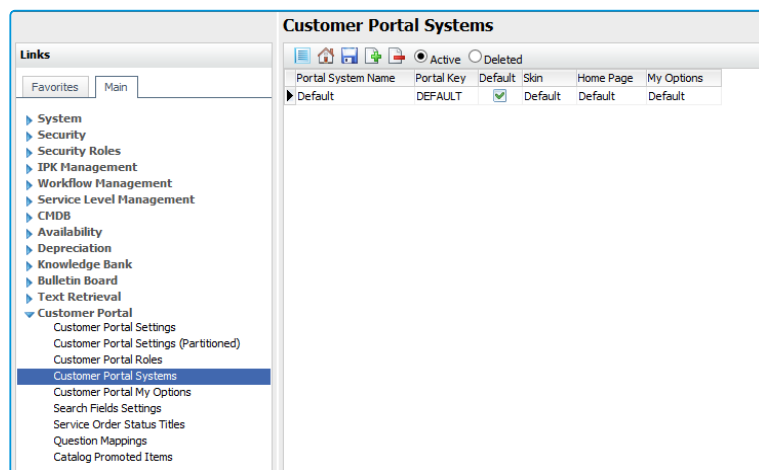
 Your customer portal image must be in a supported format. Designer supports JPEG, GIF, PNG, BMP and TIFF file formats.

- Select  to view the changes.
- Select at the bottom of the main pane to apply the changes, or to revert to the default skin.

 If you have a skin that was previously configured and you restore to default, the configurations will be lost, and the vFire Core 9.3 default skin will be applied.

- To ensure that your customer portal system is using the correct skin, go into the **Customer Portal Systems** window. (Still in vFire Core, select Menu>Admin>System Administration>Customer Portal Systems.)

- In the drop-down box, select the appropriate skin, if it is not already displayed.

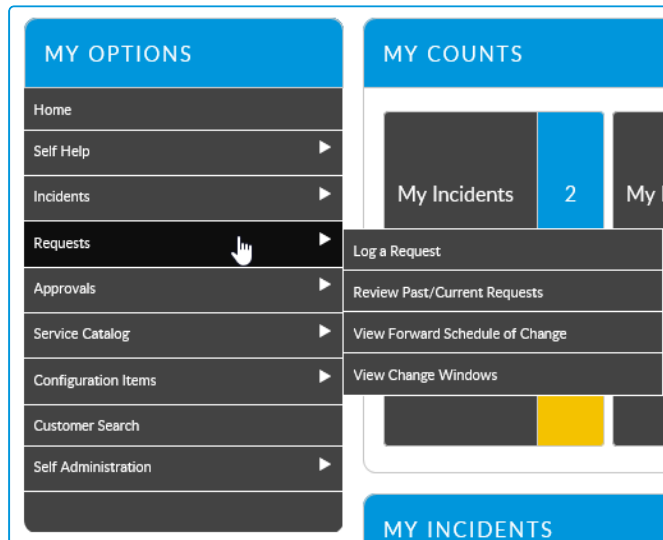




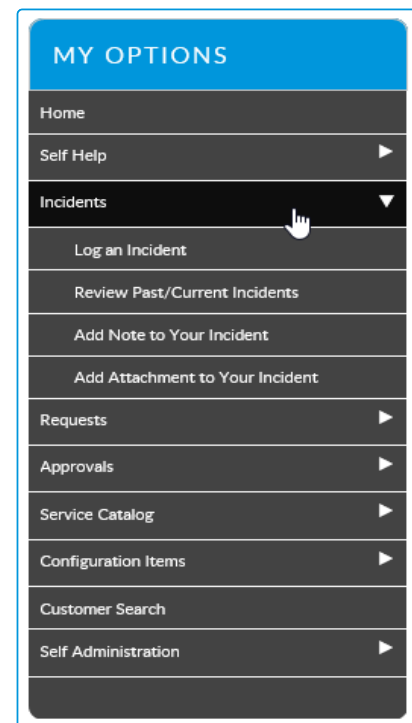
Configuring My Options

In the vFire Core Customer Portal, your screen has a **My Options** pane down the left hand side, containing all of your available options. Some options are section titles, containing further options. These are indicated by a small arrow to the right of the option name.

There are two display types – **default** and **classic**.



In the **default** display, menu options pop out when you hover.



In the

classic display, the menu expands by dropping down.

You can configure the My Options pane to change the

- Display name (“My Options”)
- Menu behavior – expand or pop out
- Available options
- Names of options
- Order of options

You can also create custom options, which take the user to a URL which can be within or outside the customer portal.

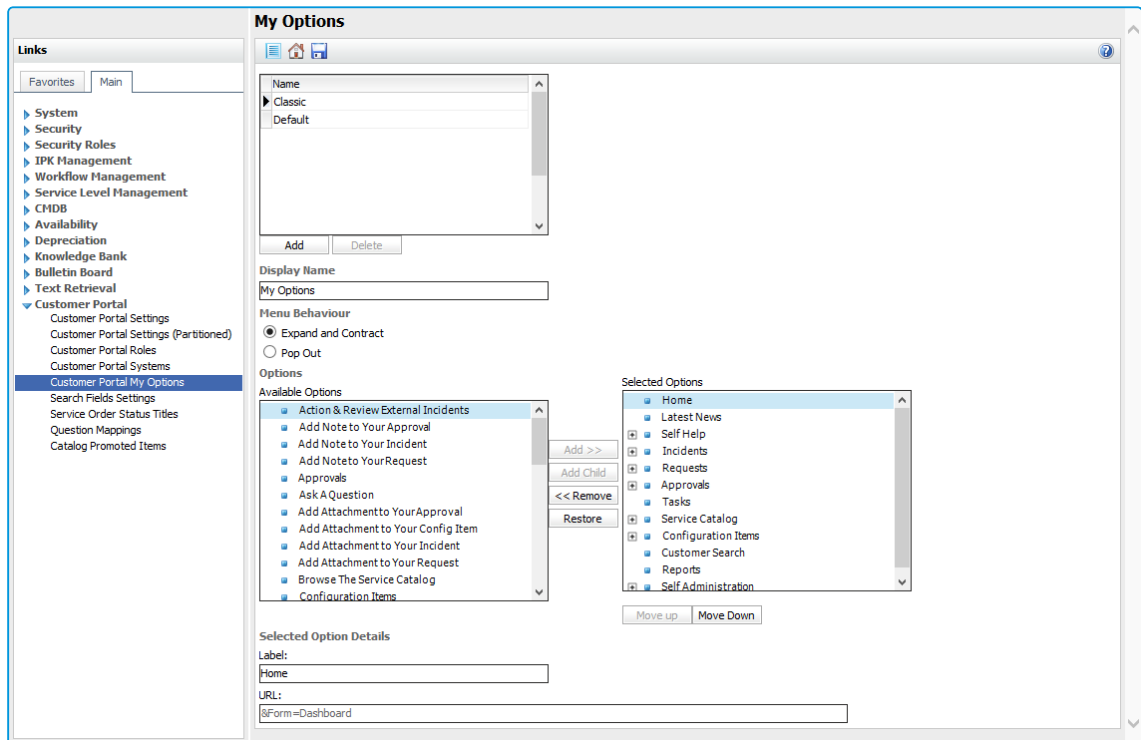


You can configure the colors, fonts and appearance of the **My Options** menu using the skin, as described earlier.



To configure **My Options**, take the following steps:

1. Select **Menu** and then **Admin**. In the submenu, select **System Administration** and within the **Customer Portal** group in the explorer pane, select **Customer Portal My Options**.




2. The existing **My Options** menus are displayed in the **Name** field. Click on the one you want to view to see the settings, or make changes.
3. To create a new **My Options** menu, click **Add** beneath the **Name** box and key in the name of the new **My Options** menu.
4. You can add, remove and reorder the items listed in the **Selected Options** table.
5. To add an option, select it in the **Available Options** table and then select **Add >>**.
6. To add an option so that it appears within a section, select the main option in the **Selected Options** table, select the option you want to add from **Available Options**, and then select **Add Child**. The parent item is now a section title, and you will see the small plus sign appear beside it, if it was not already there.
7. To create a new menu option, select **Custom Option** from the **Available Options** table and then select **.** Complete the details in the **Selected Option Details** section, as follows:



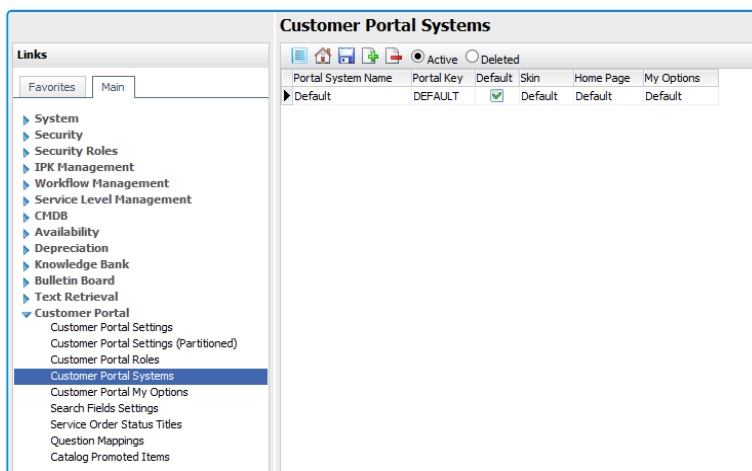
- Label** Key in the name that will appear in the My Options menu
- URL** URLs can be a link to a page within the Customer Portal or to a web page.

Link to pages outside the Customer Portal must begin with www, http, or https. For links to within the Customer Portal, you only need to include the portion of the URL that follows ?LITE.

The full address for the Customer Portal Knowledge Search page is `http://server/virtual_directory/Core.aspx?Lite&Form=KnowledgeSearchCriteria` so you would enter `&Form=KnowledgeSearchCriteria` into the URL field.

 This is simple linking. Advanced linking is covered in another module.

8. To ensure that your customer portal system is using the correct **My Options** menu, go to the **Customer Portal Systems** window. (Still in vFire Core, select Menu>Admin>System Administration>Customer Portal Systems.)
9. In the drop-down box, select the appropriate **My Options** menu, if it is not already displayed.
10. Save the changes.

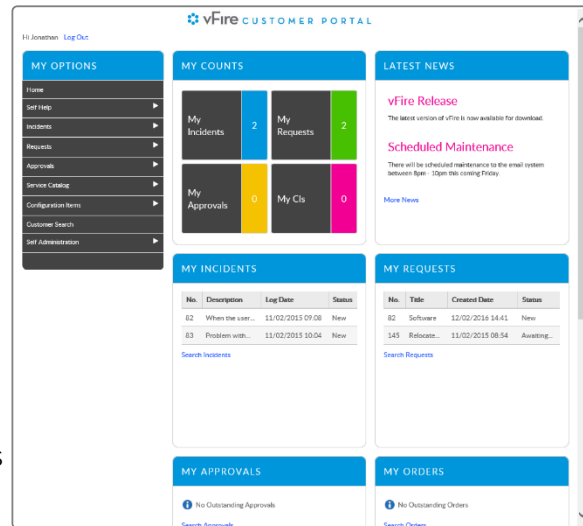




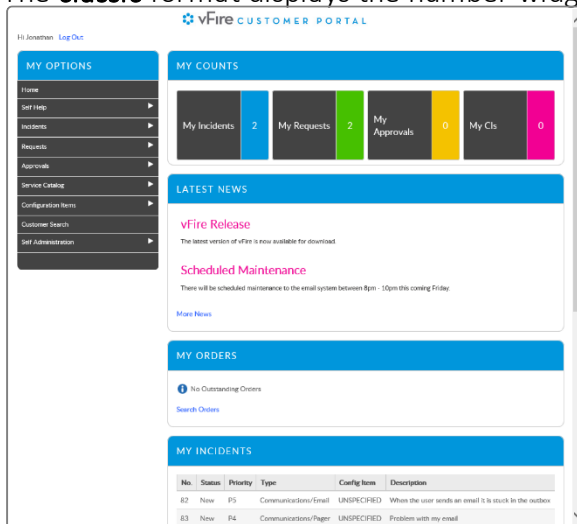
Choosing a Home Page Layout

When you install vFire Core 9.3, your customer portal home page will have the default layout, with widgets in blocks. However, you can change to the classic layout, which displays the widgets as a single column.

The **default** format displays fixed height widgets, side by side. If there are more entries than can be displayed, you will see page icons at the bottom of the widget which you can use to view further entries.



The **classic** format displays the number widgets



in a block across the top of the screen, and the widgets containing further details are displayed in a single column beneath them. The widgets expand to accommodate the number of entries, (with the exception of the My Requests widget, which is paginated, as per earlier versions of the product).

1. To choose a customer portal **Home Page** layout, go to the **Customer Portal Systems** window. (In vFire Core, select Menu>Admin>System Administration>Customer Portal Systems.)
2. In the drop-down box, select the appropriate Home Page option from the drop-down list, if it is not already displayed.
3. Save the changes.



Workshop Challenge – Styling the Portal



Our case study company, Amable Ltd, has a customer portal system for its Human Resources department. You are designing its customer portal screen.

Task One

1. Access the **Designer** window within vFire Core (logged in as AA/AA)
2. Clone the default skin to create a skin called “**amable hr**”.
3. Change the skin as follows, remembering to refresh each time to see the changes:
 - a. Change the **Global Font** as follows:
 - Font Family – Times New Roman;
 - Font Size - 14
 - b. Change **Page Header** as follows:
 - Banner Background Color – Teal;
 - Main Image Alignment – Left;
 - Banner Main Image – amable logo hr
 - c. Change **My Options** as follows:
 - Menu Item Background Color – Teal;
 - Menu Item Rollover Background Color – Black
 - d. Change **All Widgets** as follows:
 - Header Font Size – 24;
 - Header Text Uppercase - No
 - e. Change **Standalone Widgets** as follows:
 - Header Background Color – Teal
 - f. Change the **Counts Widgets** to colors of your choice
4. In the Customer Portal Systems window, apply the new skin to the customer portal system “**amable hr**”.



Task Two

1. Access the **Customer Portal My Options** window within vFire Core (logged in as AA/AA).
2. Create a **My Options** menu called “**amable hr**”.
3. Change the menu as follows:
 - a. Remove the following selected options:
 - Latest News
 - Reports
 - b. Add a custom option called **Payroll**, leaving the URL field blank. Save the changes.
 - c. Add the following options as children of “Payroll”, leaving the URLs blank:
 - **Timesheets**
 - **Payslips**
 - **Additional**
 - d. Add the following options as children of Additional, leaving the URLs blank:
 - **Overtime**
 - **Antisocial Hours**
 - e. Create a custom option called **Alemba Home Page**, setting the URL to the following url: **www.alemba.com**
4. Apply the new My Options menu to the **Amable HR** customer portal system.
5. Review the results by using the **Portal (Amable HR)** shortcut on your Desktop, or in your Favorites Bar, logging in as GM/GM.
6. Check your results against the model answer, provided by your trainer.



Dynamic Forms and Filtering



By the end of this module, you will be able to:

- Understand the role of simple forms
- Understand the use of dynamic logic
- Understand how to use filtering logic
- Modify a simple form



Dynamic Screens

Dynamic screens are screens which contain fields and sections that an officer or customer may or may not be able to see or complete, depending on dynamically changing conditions.

You can configure rules that will make parts of the screen hidden, read-only or optional until certain conditions are met, at which point they become visible, enterable or mandatory, keeping the screen simple, and reflecting the order in which you want things done, helping the officer or customer complete the task in hand quicker.

You can apply these to most of the elements that make up a screen – fields (including HTML fields), headings, and entire tabs or sections. Buttons can even be hidden until required, according to your needs. Wherever the properties Hidden, Read Only or Required appear on a screen element, this feature can be used.

You can use dynamic screens to:

- display a warning on the screen if a call is about to breach
- hide non-essential fields when customers are logging a Critical incident
- only show implementation details on a Change after it is Authorized
- hide unnecessary detail on a Service form until you need to add it to the catalog

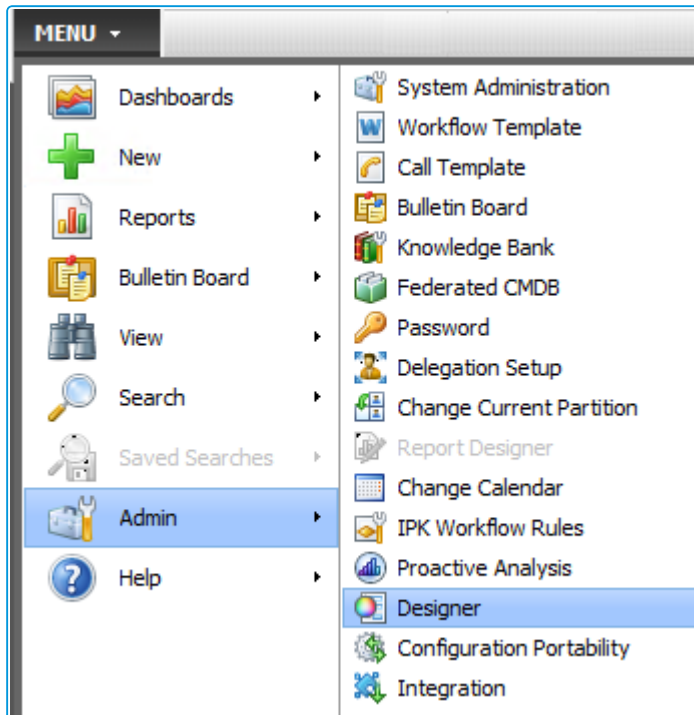
You set up the rules for dynamic screens in Designer.



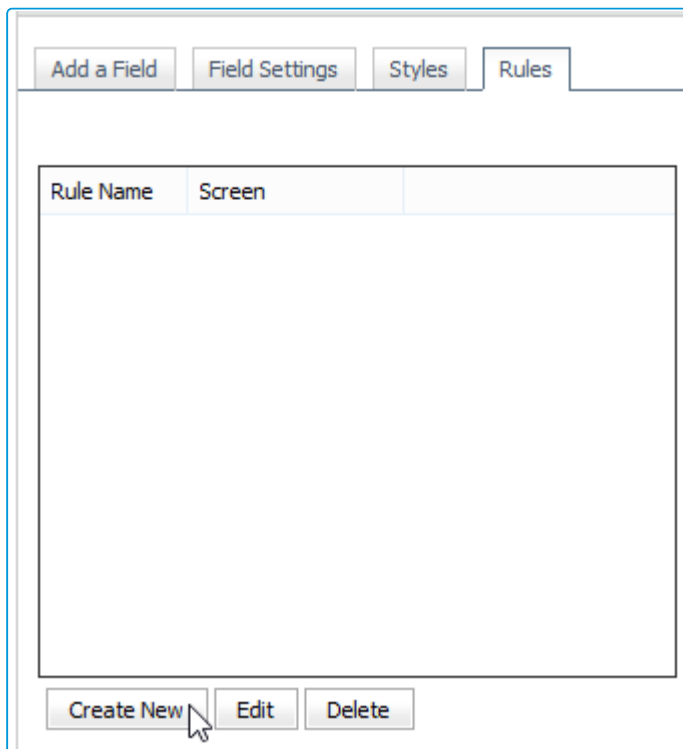
For demonstration purposes, we will apply a rule to the Log a Printer Issue submission form that states that if the Urgency is Critical, the Impact and Priority fields are hidden.



1. In vFire Core, display the **Designer** window (Menu> Admin> Designer).

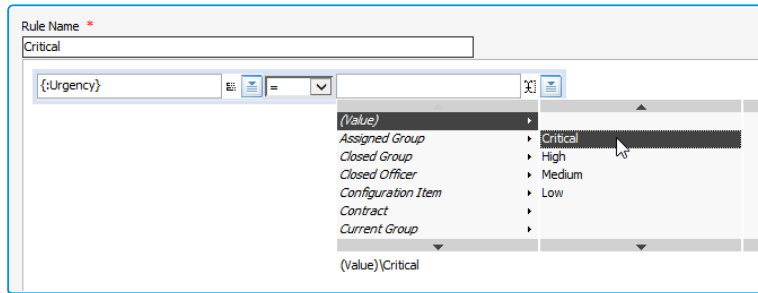


2. Find the screen you want to configure.
3. Make the **Rules** tab uppermost in the left pane, and select **Create New**.

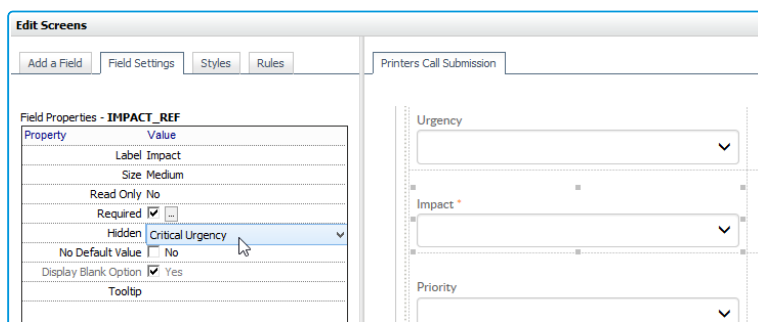




4. In the **Field Rule Configuration** window:
 - assign a **Rule Name**, in our case “Critical”
 - click on the question mark and use the drop-down list to select the field, in our case “Urgency”
 - select the other conditions, in our case “=”, and Value “Critical”



5. Select the fields that you want to behave dynamically, in our case “Impact”.



6. With the **Field Settings** tab uppermost in the left pane, set the conditions, in our case, we used the drop down box beside **Hidden** to select **Critical**.
7. Repeat for any other fields that are affected.
8. Save the changes.
9. Test your dynamic fields by running the screen and changing the conditions.



You can find out more about Designer in the [Online Help](#), or by attending the **Designer Training Course**.




Filters for Search Fields on Submission Forms

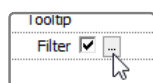
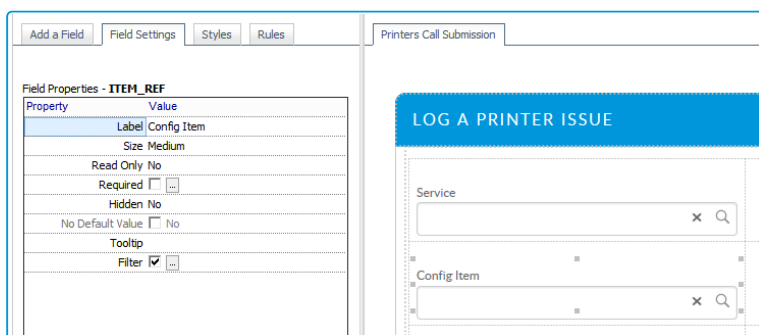
You can apply search filters to entity fields on portal submission screens, limiting the search results to the conditions defined in the filter.


Filters do not bypass customer portal security role settings, therefore when a search is performed on a field that has a filter applied, both the filter and the customer portal role permissions affect the results.

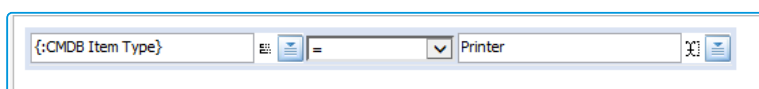
Filters are specific to the selected field on the selected screen, meaning that setting a filter on a Person field in one screen will not apply that filter to Person fields on all screens.

 For demonstration purposes, we will apply a filter to a call screen that is designed for logging printer issues, so that users only see configuration items that have a CMDB Type of “Printer”.

1. In vFire Core, display the **Designer** window (Menu> Admin> Designer).
2. Find the screen you want to configure.
3. Select the field you want to filter. In our case, it is the **Config Item** field. .
4. With the **Field Settings** tab uppermost in the left pane, select the **Filter** checkbox.



5. Click on the  button to display the Rule Configuration window.
6. Click on the question mark and define the rule.



7. Save the changes and test your filter in the customer portal.



Workshop Challenge – Dynamic Forms and Filtering



Users of the Amable HR customer portal system want their mobile incident call submission screen to filter the configuration items displayed to show only mobile devices, and hide certain fields depending on the urgency of the call.

1. Log in to vFire Core (using the AA/AA login).
2. Display the **Designer** window.
3. Open the **Mobile Incident Call Submission** form.
4. Apply a filter to the **Config Item** field so that users will only find configuration items with a **CMDB Type** of **Mobile Device**.
5. Create a rule for if the Urgency field is “Low”.
6. Apply conditions to the Send Email and Send Pager fields to say that if the Urgency is “Low”, these fields are hidden.
7. Save your changes.
8. Access the Amable HR portal, using the “Portal (Amable HR)” shortcut on your Desktop, or in your Favorites Bar, logging in as GM/GM.
9. Test the submission form.



Service Catalog



By the end of this module, you will be able to:

- Understand how the service catalog works
- Configure quantity and cost for CMDB items
- Use categories
- Change icons, labels and categories in service catalog entries
- Understand promoted items
- Create promoted items
- Search in the catalog



How the Service Catalog Works

The Service Catalog lists the services that an IT provider currently offers to its customers. It is visible to customers by way of a Portal.

In vFire Core, service entities can be:

- **Services**, which are high level offerings such as “Network”. Customers order Services in the form of Service Actions or Service Bundles.
- **Service Bundles**, a collection of service actions used to meet a complex service or business requirement.



The “New Employee” service bundle may contain the “Create New Email Account” service action and the “Give Access to Network” service action, among others.

- **Service Actions**, specific service entities such as “Give Access to Network”. Customers can order Service Actions directly from the Portal.

Setting up the Service Catalog

To make a service entity available for ordering through the Portal, the Service Catalog Manager:

- Creates the service entity
- Assigns it a Portfolio Status with Portal visibility
- Assigns it a Portal Display Category
- Links it to at least one subscriber group (or makes it available to all customers)
- Links each Service Action to a call or request template.



You can find out more about setting up the service catalog in the online help, or in the Advanced Configuration Management training course.



Using the Service Catalog



The Service Catalog Manager creates a series of Services, Service Actions and Service Bundles and makes them available on the vFire Customer Portal. Each Service Action is also linked to a call or request template.

The customer browses the Service Catalog on the vFire Customer Portal and orders one or more Service Action or Bundle. Alternatively, the Officer can order on their behalf from within vFire Core.



Calls or requests are automatically created in vFire Core as a result of the service order. An officer reviews the service order within vFire Core and actions the call or request to process the order.



The customer receives an email indicating that the service is now available for use.

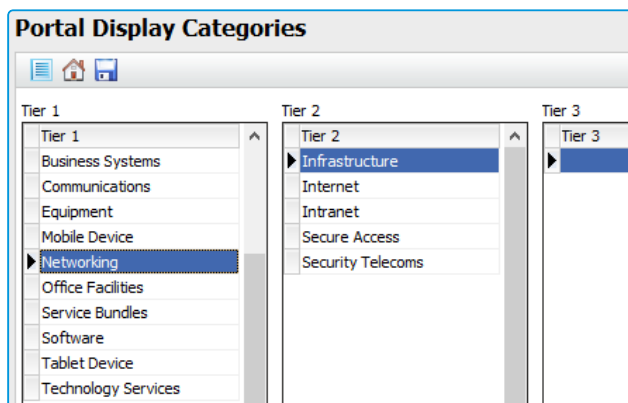




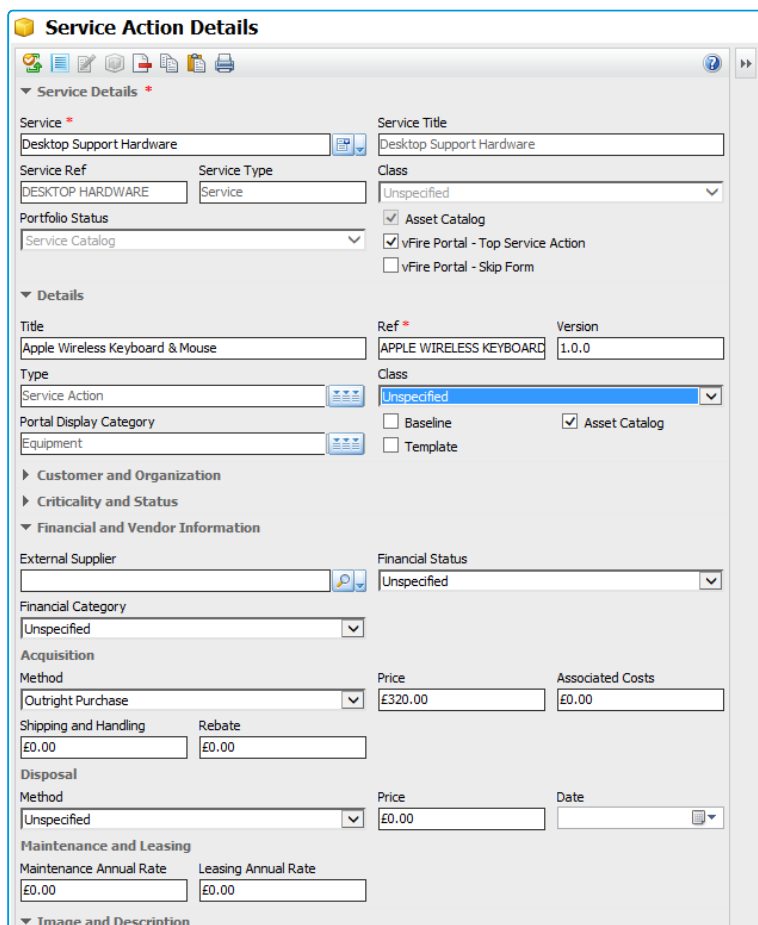
Configuring Items for the Service Catalog

Within vFire Core, you can apply various settings to configuration items, including how many of the items can be ordered at one time, how much they cost and how you want them displayed in the service catalog.

1. First, you define your Portal Display Categories.



2. Then you assign the other settings for the CMDB item itself, including a Portal Display Category, whether multiple items can be ordered, and the price of the item.





We will see how this is displayed in the vFire Customer Portal shortly.



Promoted Items

The Service Catalog Manager can select service actions and bundles to be 'promoted' in specific customer portal systems. Promoted items are displayed automatically when customers first access the Service Catalog browse window in the vFire Core Portal. A promoted item will only appear for users who have permission to view it.

Promoted items are only displayed by default when first accessing the Browse the Service Catalog window in vFire Core Portal. Running a Service Catalog search will remove those promoted items unless they meet the search criteria specified in the search.

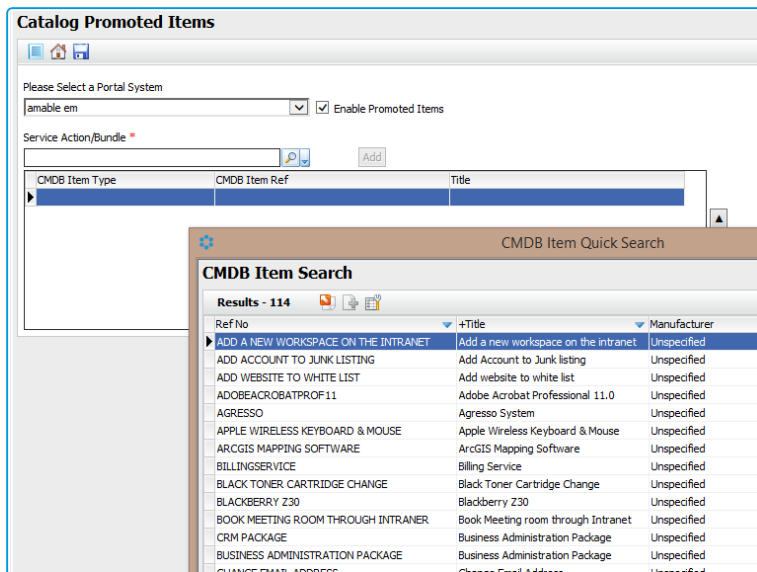
The screenshot shows the vFire Customer Portal interface. At the top, it says "vFire CUSTOMER PORTAL". On the left, there is a "MY OPTIONS" menu with items like Home, Latest News, Self Help, Incidents, Requests, Approvals, Service Catalog, Configuration Items, Customer Search, and Self Administration. The main area is titled "SERVICE CATALOG" and features a search bar with "Select a Category", "Search", and "Advanced Search" buttons. Below the search bar, there are six service items displayed in a grid:

- Add Account to Junk listing**: £25.00, Order button.
- Remote Access**: £100.00, Order button.
- New Starter**: £0.00, Order button.
- Change Email Address**: £100.00, Order button.
- iPhone 6 Plus 16GB Silver**: £630.00, Order button.
- iPad Air 2 32GB Space Grey**: £479.00, Order button.

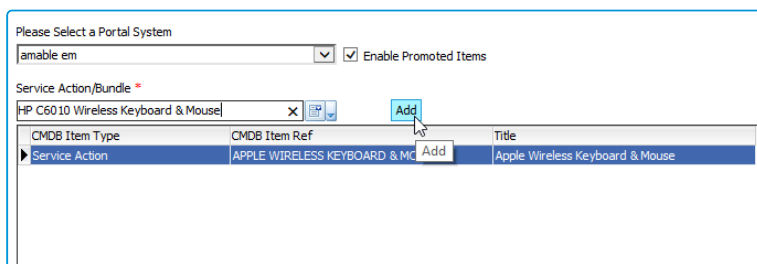
1. To promote an item, go to the **Catalog Promoted Items** window. (In vFire Core, select Menu>Admin>System Administration, and within the Customer Portal group, select Catalog Promoted Items.)
2. Select the portal system and tick the checkbox to **Enable Promoted Items**.



- Use the search field to identify the Service Action/Bundle you want to promote.



- Select **Add** to display the item in the browse table.



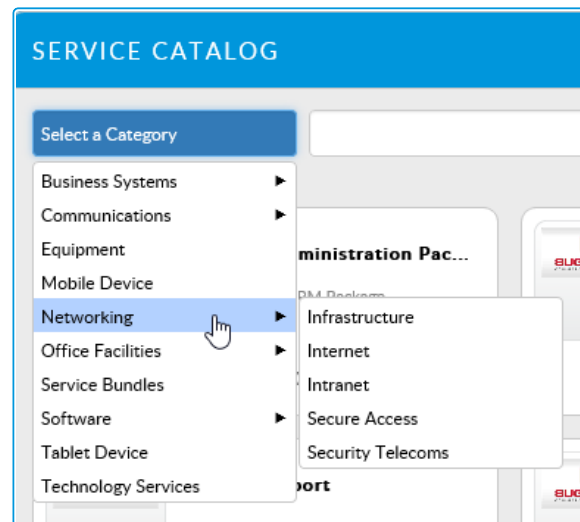
- Use the arrow keys to determine the order of the items in the Promoted Items list.
- Save the details.
- Test the visibility of your promoted items by logging in to the appropriate vFire Customer Portal and displaying the service catalog. Your items should appear on the service catalog home page.



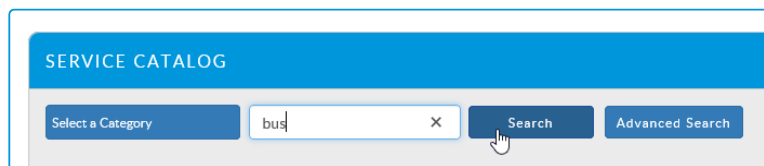
Searching the Service Catalog

When users first access the service catalog, they see the promoted items. They can find other items by **browsing** through the categories, or **searching** in the Search box.

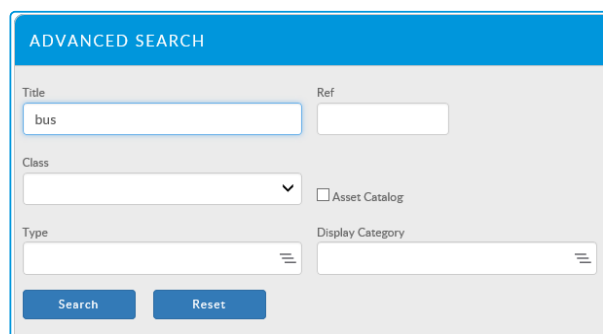
1. To **browse** using the categories, simply click on the **Select a Category** button, and then hover over the different categories to see the further sub-categories.
2. Click to select a category. This will display the services available for you to order within it.



1. To **search** for an item, key the first few characters into the search box and click the **Search** button.



2. To use the advanced search function, select the **Advanced Search** button. This gives you further searching and filtering options.





Workshop Challenge – The Service Catalog



As system administrator, you want to promote certain items in the Amable HR customer portal system, so that they appear on the first screen when users browse the service catalog.

1. Display the **Catalog Promoted Items** window within vFire Core (logged in as AA/AA).
2. Promote the following items in the service catalog for the “amable hr” customer portal system:
 - Apple Wireless Keyboard & Mouse
 - Consulting
 - New standard laptop
 - New Starter Request
3. Access the Amable HR portal, using the “Portal (Amable HR)” shortcut on your Desktop, or in your Favorites Bar, logging in as GM/GM.
4. Browse the Service Catalog to check your promoted items are displayed on the first screen.



Enterprise Service Management

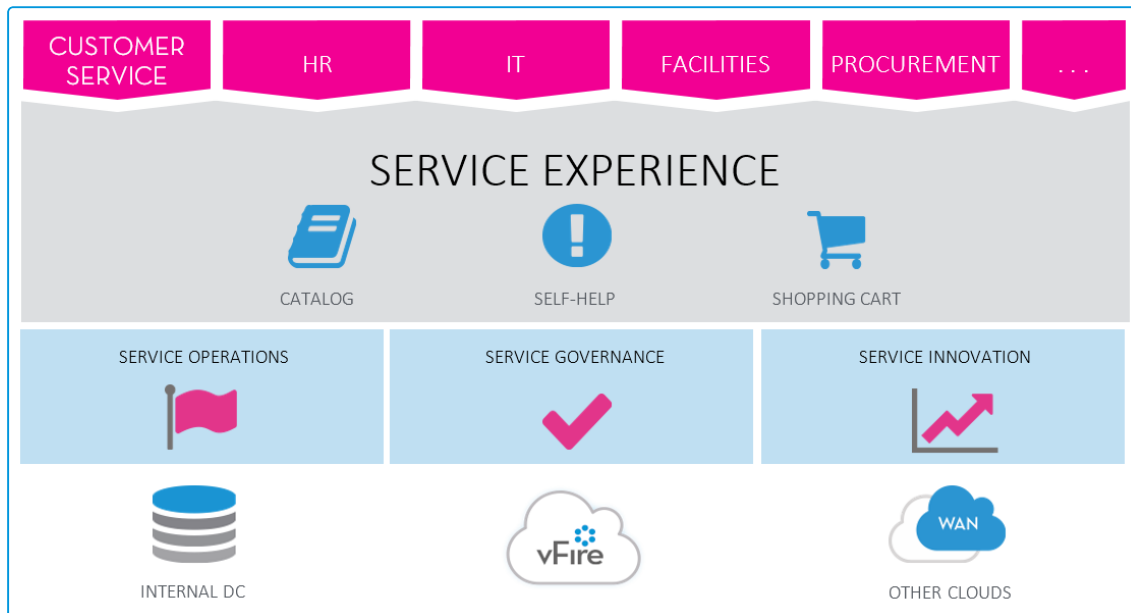


By the end of this module, you will be able to:

- Understand where customer portal systems are maintained
- Understand how to create a new customer portal system
- Make different customer portal systems the default, and understand the significance in terms of URLs
- Apply different skins, My Options menus and Home Page layouts to different customer portal systems



Enterprise Service Management in vFire Core



Alemba supports a variety of enterprise service management models, from a single portal offering services which are met by a range of dedicated departments or service providers, to a number of customer portal systems.

In vFire Core, you can create multiple customer portal systems, which can either be accessed independently, or via a custom option from a single customer portal system.

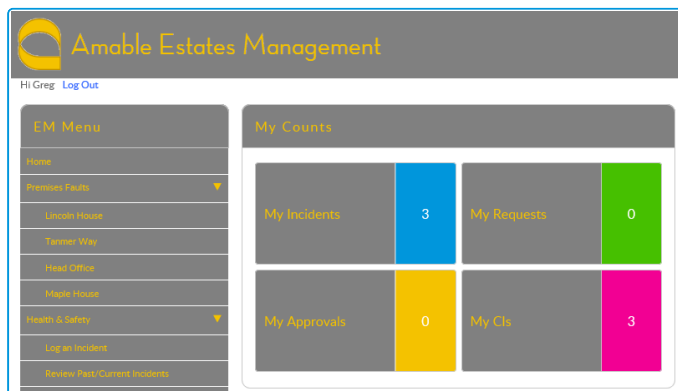
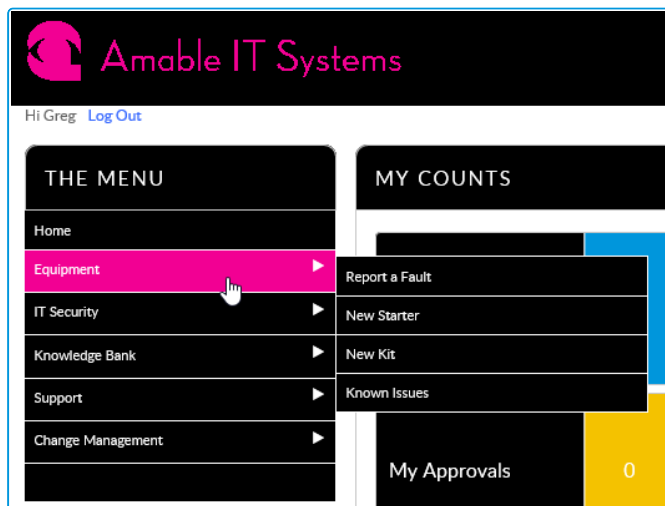
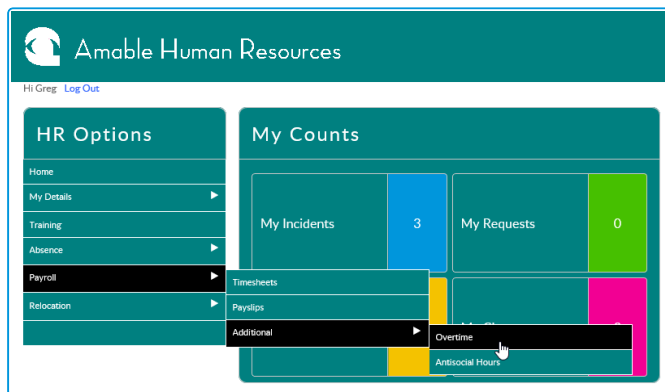
When you first install vFire Core, you will have a default customer portal system. However, you can create multiple customer portal systems to reflect the different areas of the business, and each of these systems can be tailored to suit the needs of its users, as well as designed to look distinctive and unique.

You have already seen how to configure the skin, My Options menu and select alternative Home Page layouts. Now we will create a new customer portal system and apply different skins, menus and layouts.



My Options menus

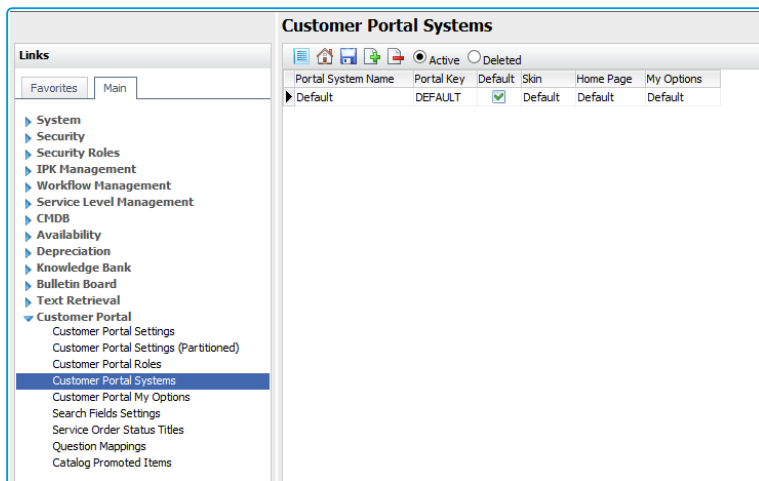
Our company, Amable Ltd, has a customer portal system for their HR, IT and Estates Management departments, among others. These portals need to contain different options, and have a different appearance, to reflect localized branding and make them easily recognizable. We have illustrated some of the possibilities below.





Creating Multiple Customer Portal Systems

1. To create a customer portal system, display the **Customer Portal Systems** window. (In vFire Core, Menu> Admin> System Administration> Customer Portal Systems.)



2. Select .

3. In the new row, key in the details:

- Portal System Name** Type the name of the new system
- Portal Key** Enter a unique identifier needed in the URL to access the new Customer Portal.
- Default** Select to use this as the default portal system.
- Skin** Select the Skin to use for this system.
- Home Page** Select the style of home page, either Default or Classic.
- My Options** Select a menu pane configuration (My Options) for this system.

4. Save the changes.
5. In Internet Explorer, key in the URL for the portal. If you specified the Portal Key as SALES, the URL to access this Portal would be `http://<server name>/<systemname>.aspx?Lite&Portal=SALES`.
6. Log in as normal to access your new customer portal system, with all of the default



settings.

6. Log in as normal to access your new customer portal system, with all of the default settings.
7. To update the settings, return to vFire Core Admin, and select different options from the drop down lists in **Skin**, **Home Page** and **My Options**.



Workshop Challenge – Multiple Customer Portal Systems



Our case study company needs a customer portal system for their Estates Management department, with its own branding and menu items.

1. Create a customer portal system for Amable Estates Management, using the following settings:

Portal System Name	amable em
Portal Key	amableem
Skin	amable em
Home Page	Classic
My Options	amable em

2. Log in to the new portal system, using the username/password combination GM/GM.
3. Explore the home page to see that the classic (one column) display is selected, and the skin is applied. Hover over the My Options menu options, to see the submenu(s), noting that this menu is for demonstration purposes only, and the options will not take you to other screens/forms.
4. If you wish, return to the Customer Portal Systems screen and select different My Options and Skins combinations, refreshing the vFire Customer Portal to see the effect of the changes.



Searching



By the end of this module, you will be able to:

- Configure the search-as-you-type functionality in vFire Core for default and custom fields
- Configure search results
- Set search options

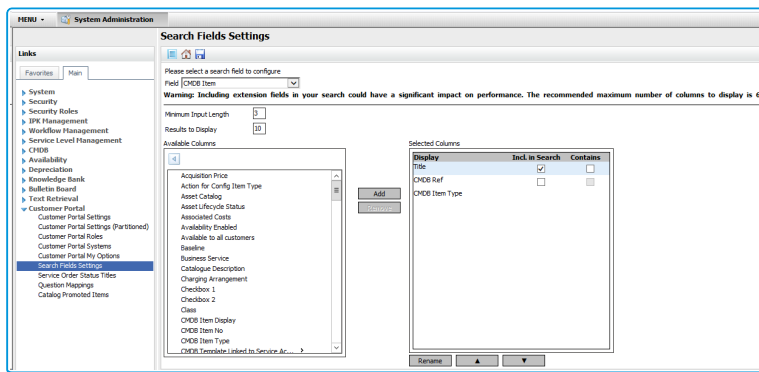


Configuring Search-as-you-type

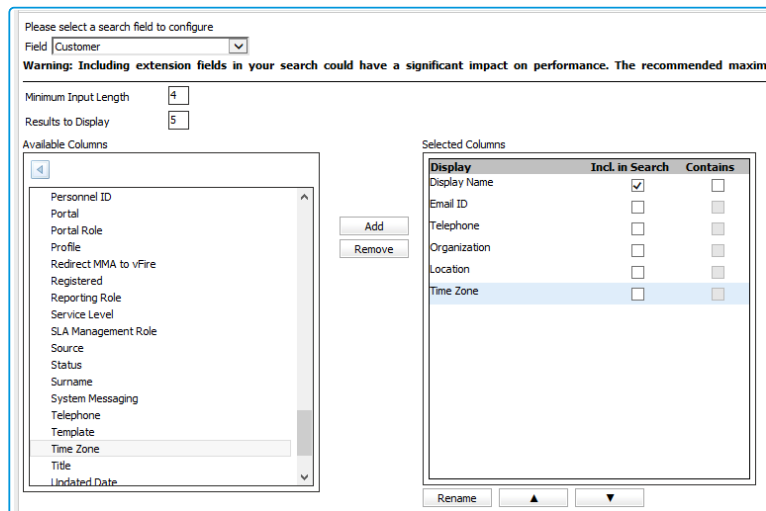
You configure search fields in the **Search Fields Settings** window, choosing from all available fields, including any custom fields you have created yourself in Designer.

For demonstration purposes, we will configure the Customer search field to find results after an input of 4 characters, and it will display 5 results per screen. We will accept the default set of displayed columns.

1. In vFire Core, display the **Search Field Settings** window (Menu>Admin>System Administration>Search Field Settings).



2. Select the search field you want to configure. In our case, it would be Customer.
3. Specify the details, including the minimum input length and number of results to display.
4. Select the columns that you want to appear in the search results, reordering and renaming them if you wish.
5. Save the details.
6. Test your configured search fields in the customer portal.





Workshop Challenge – Configuring Search Settings



As system administrator, you want to configure the search settings in the **Configuration Item** field.

1. In vFire Core (logged in as AA/AA), display the Search Field Settings window.
2. Configure the Search Fields Settings so that the system finds search strings with a minimum length of 2 characters, and displays up to 5 items.
3. With **Configuration Item** selected as the **Field**, add the following to the Selected Columns:
 - Manufacturer
 - Location
 - Organization
4. Ensure that the search is configured to include the items in the search that contain the search string.
5. Access the Amable HR portal, using the “Portal (Amable HR)” shortcut on your Desktop, or in your Favorites Bar, logging in as GM/GM.
6. Log an Incident, using the “Fix my issue...” template.
7. In the **Service** field, key in the characters “des” (to see several search items suggested), and select “Desktop Support Hardware”.
8. In the **Config Item** field, key in the characters “wir” to ensure that one or more Apple Wireless Keyboard & Mouse Configuration Items are displayed, demonstrating that your search settings have been successfully saved.
9. Leave the screen without submitting the incident.



Advanced URL Linking



By the end of this module, you will be able to:

- Understand the concept of advanced linking
- Configure advanced links in My Options
- Create a deep link so that field values are prepopulated in a screen
- Understand the concept of “outside-in”, in which you can create advanced links in your Intranet or SharePoint systems to allow users to access windows and forms in vFire Core



Simple and Advanced Linking

vFire Core uses URLs to access different interfaces, like the customer portal.

You already know how to create a custom option that will take a user to an option or website by keying in the URL for the option or website.

This is **simple** linking.

vFire Core also uses URLs to perform complex functions such as launch searches, open incident forms, view service orders, and even to pre-populate fields on submission forms or search criteria windows, and then to submit those forms or searches. So, using URLs, you can:

- Create options that will open specific submission forms and populate fields with predefined values.
- Provide a link in an email that will take the recipient to, say, a specific knowledge bank article
- Create links in your Intranet or SharePoint that will take users directly to specific screens in vFire Core

This is **advanced** linking.



Advanced Linking to Prefill a Form

You can create a custom option that will take a user to a specific form, and prefill specified fields with predefined values.



You can create an option that would take the user to the service catalog and complete the fields needed to order a specific item.

The URL simply needs to contain the name of the screen, the number of the item you want to order and the order button, as follows:

Label:	<input type="text" value="Order Office 2013"/>
URL:	<input type="text" value="&TemplateName=LITESERVICECATALOGSEARCH&QUANTITY286=1&BTN_ADDTOCART286=Order"/>

Each item in the link starts with an &, and 286 is the number of the Office 2013 configuration item, so...

&TemplateName=LITESERVICECATALOGSEARCH is the name of the screen

&QUANTITY286=1 is the quantity of item 286 (Office 2013)

&BTN_ADDTOCART286=Order is the button we want to use



Advanced Linking to a Specific Page in the System

You can identify a link to a specific page in the system, say, a knowledge bank article, and then either create a custom option that contains that link, or include it in an email to customers, bearing in mind that vFire Core will prevent any users from accessing screens and information if they do not have the correct security permissions.

So, if you want to create a link to, say, knowledge bank article number 245, the link would look like this:

&TemplateName=LiteKnowledgeSearchResults&BTN_SELECT245=View

Breaking this down...

&TemplateName=LiteKnowledgeSearchResults is the name of the window that displays Knowledge Bank articles

BTN_SELECT245=View is the unique reference of the knowledge article

If you want users to access the page using this link from outside the system, you must prefix the link with the system name, so the full link would be:

**http://server_name/virtual_
directory/Core.aspx?Lite&TemplateName=LiteKnowledgeSearchResults&BTN_
SELECT245=View**

You can then use the links in emails to customers, or even to create an option within your SharePoint or Intranet system to take users straight to specific pages in vFire Core.



Workshop Challenge – Advanced Linking



Users in your amable hr customer portal system want a custom option that will take them to a screen on which they can review orders.

1. Access the **Customer Portal My Options** window within vFire Core (logged in as AA/AA).
2. Open the **amable hr** My Option menu.
3. Create a custom option called **Review Orders**. It should appear at the bottom of the My Options menu.
4. Key in the following URL:

&Form=ServiceOrderSearchCriteria

5. Create another custom option called **Go to Amable IT**.
6. Key in the following url, replacing <portal> with the key for the Amable IT customer portal system:

http://localhost/Core.aspx?Lite&portal=<portal>

7. This will take users to the Amable IT customer portal system.
8. Access the **Amable HR** portal, using the **Portal (Amable HR)** shortcut on your Desktop, or in your Favorites Bar, logging in as GM/GM.
9. Test your custom options.



If you are creating a link from one customer portal system to another in a live system, you would have to specify the full URL for the target customer portal system. If single sign-on is not turned on (which it is not in this training environment) you will be presented with the Login screen for the destination portal system.



Feedback & Evaluation Form

Name					
Course/Date	Customer Portal Training				
	Strongly Agree	Agree	n/a	Disagree	Strongly Disagree
My learning objectives were met					
The training was at the correct technical level					
We covered the correct amount of material. (Please specify any further material you were expecting.)					
I learned about features that I wasn't aware of before.					
I will use the skills and knowledge I have gained					
My learning will improve my performance at work					
The trainer was engaging and professional					
The course materials were useful and effective					
The course conditions (laptop access, etc) were effective					
Please use this space to provide any further comments or feedback.					
Thank you for your time					

