ClientSpace User Guide

A guide to service SMBs and manage the day-to-day business processes

ClientSpace R151

Copyright notice

Company Website: http://www.prismhr.com

ClientSpace Support: extranet.clientspace.net/next

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Chapter 1

Getting to Know ClientSpace

ClientSpace is a customer relationship management system (CRM) that enables you to track the many moving parts of your PEO system. With ClientSpace, you can multitask and work more efficiently.

Let's face it, your business is complicated. ClientSpace was designed to help manage the day-to-day of your business to keep track of all those loose ends that make your business work, which means ClientSpace can be complicated too. ClientSpace functions as your command center where you can see everything that is going on with your clients and take action. With ClientSpace you can receive alerts and notifications, manage cases and tasks, and setup workflows. Let's start by reviewing the various components of ClientSpace.

Alerts and notifications

Receive instant notifications of important data changes and events so you can act rather than waiting for an employee to contact you with an issue. Receive alerts to your ClientSpace Inbox (through email) and to all your devices (through Slack). Alerts are entirely customizable—choose which alerts you receive and how you want to see them. See ClientSpace Notifications.

Case management

Resolve issues reported by your small and midsize business clients more quickly. It is easy for both clients and your team to create tickets and assign tasks to stay on track. Cases can be organized based on category and type and can be configured as templates to ensure your team manages common issues consistently.

Task management

Split cases into manageable chunks to keep your team organized and focused on what is important. Tasks are flexible and configured to align with the way your team works. For example, you may choose to deploy tasks sequentially, so a new task initiates only after the preceding step completes. Or, kick off a series of tasks all at once.

Workflows

Improve reaction time and coordination across your team with workflows that can be set up to match your business processes and automate task assignment. Workflows help each team member know what they need to focus on next and prioritize their to-do lists.

Dashboards

Quickly see and report on what is most important to you. Whether it is cases and tasks completed or other sales and client service metrics, it is easy to measure your team’s performance. Dashboards are typically configured by role but can be customized by the individual.

About ClientSpace

ClientSpace is a world-class Enterprise CRM (customer relationship management) system that enables you to manage and measure client service across your entire organization. ClientSpace is a sophisticated application with many moving parts.

In support of PEO clients, realizing your costs to support clients is a lot like putting together a puzzle upside down. While the definition of net client profit is not standard across the industry, ClientSpace provides an ideal platform to compare and measure how your clients stack up when it comes to boosting your bottom line.

Additionally, users can access the system on any device, anywhere they can connect to the internet, all with a responsive design. The freedom of access opens up a world of possibilities when it comes to connecting with your clients.

Workflow Channels

If there is one thing that ClientSpace clients express as an objective for their implementation, it’s the orchestration of their workflow. Workflow is one of those words that can mean different things to different people. In the ClientSpace world, workflow means that ClientSpace can be configured to know how transactions flow through your business, know what validations and calculations need to happen as things move from one step to the next, and also which employees need to be involved at every step.

Email Templates

ClientSpace administrators can configure Email Templates to trigger based on specific conditions with message content (email or internal ClientSpace message) appropriate for the trigger condition.

Dataforms

ClientSpace has been tailored to the unique needs of the PEO industry, primarily using the dataform architecture. Dataforms allow administrators to modify forms or create entirely new forms and sub-systems all without writing a line of code.

APIs and Integrations

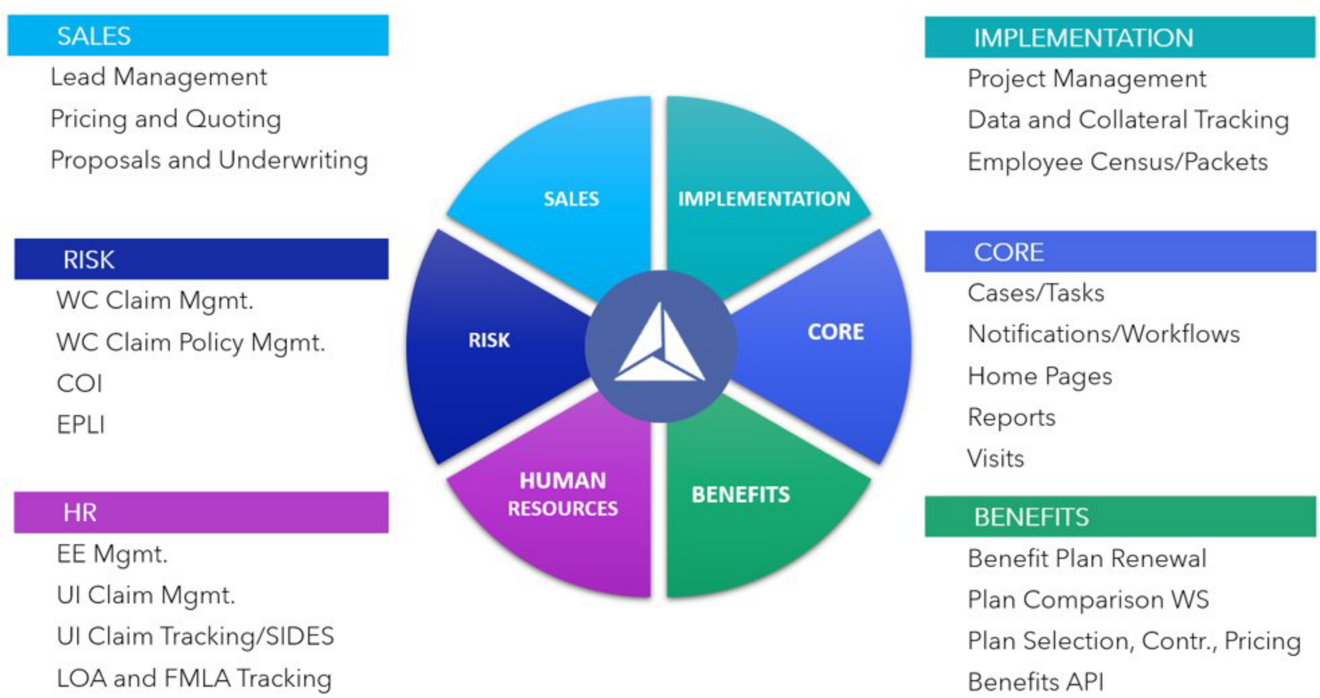
One of the most powerful components of ClientSpace is the ability to import data into the system without any programming and without compromising the business rules and workflow that are critical to serving your clients.

Reporting

ClientSpace reporting is powerful. It enables you to produce reports, charts, visualizations, and dashboards using any of the data that is in the ClientSpace database.

ClientSpace Modules Overview

In this topic, we provide a brief overview of what each ClientSpace module does. There are 6 ClientSpace modules:



Review the main functionality highlights of each module below:

Sales

- Lead & Opportunity Management -Track sales activity progress with organizations, contacts & activities.
- Underwriting - Underwriting approvals, documents, notes, and pricing are all in kept in one easy to use place.
- Pricing - Unparalleled pricing engine for creating the best and quickest opportunities plus commission tracking.
- Proposals - Generate a Proposal, CSA, Exhibit A, etc. all with the push of a button.
- Partner Integration - DocuSign allows you to sign proposals quick and easy. GradiantAI gives you the insights before bringing on a client. These are just two of the many partner integrations available.
- Manage Sales records using customized Sales Home Pages.

Implementation

- Project Management Tracking with Milestones - Enjoy 24/7 visuals on where a client is in the onboarding process.
- Implementation Reports - Easily modify reports to view the information you need.
- Client Export to PrismHR via API - With just a push of a button, send your client information into Prism to create a client.
- Manage records using the Implementation Home Page.

Risk

- Workers' Compensation (WC) Claims - Easily manage all claims from creating a new claim, to importing loss runs, to updating existing claims.
- Workers' Compensation Policies - View and renew all WC policies from all carriers in one place.
- Reports - Generate OSHA, FROI and wage statement reports with the push of a button.
- Employment Practices Liability Insurance (EPLI) Claims -Track your EPLI policies and claim data.
- Certificate Of Insurance (COI) - Save time sending out certificates of insurance with our easy-to-use forms and reports.
- Manage records using the Risk Home Page.

Core/Client Service

- Cases and Tasks - Solve all of your client's questions and concerns with cases and tasks.
- Notifications and Workflows - Get notified via the workflows that work for you.

- Unique Home Pages - Create as many home pages as your company needs.
- Reports - Create reports containing your data.
- API - Enjoy custom integration with Prism. If you need it, ask for additional API support.

Human Resources/HR

- Employee Data Management - Access employee and employment data.
- Unemployment Claims (UI) - Manage and track unemployment claims.
- Leave of Absence (LOA)/Family Medical Leave Act (FMLA) - Manage and track LOA and FMLA items.
- State Information Data Exchange System (SIDES) Integration - Efficiently and seamlessly submit unemployment claims to SIDES through ClientSpace.
- Manage records using the Unemployment Home Page.

Benefits

- Benefit Plan Renewal - Renew benefits plans with the push of a button.
- Plan Selection, Contributions, and Pricing - Set up plans, contributions and pricing.
- Plan Comparison Worksheet - Quickly download a client facing benefit plan comparison (in Excel).
- Client Plan and Pricing -API Feed to PrismHR - Effortlessly send benefit plans and pricing into PrismHR.

Related Topics:

- ClientSpace Layers

ClientSpace Layers

ClientSpace is built in a series of software layers.

Core

Core is the most basic of the layers. Core provides basic customer relationship management (CRM) functionality, as well as the lead management and client service modules. This layer is extremely powerful – the foundation of all ClientSpace functionality. The foundation layer includes our powerful dataform engine, workflow engine, data integration tools, and reporting and dashboards. Using the tools available, we can build elaborate systems to help manage your business.

PEO

A PEO is a professional employer organization, which is an outsourcing firm that supplies services to small and medium-sized business. The PEO layer of ClientSpace provides end-to-end enterprise management. So how does it work? Qualified leads become prospects, which then generates a workspace. Sales staff submit a deal to underwriting. Next, sales signs the deal with the client. This event activates the client and generates a client workspace.

Custom

Overlying the Core and PEO products is the custom or candy layer of the software. This layer is client-specific and includes custom dataforms, business rules, and reports, used by our clients to make ClientSpace their own.

Related Topics:

- ClientSpace Modules Overview

ClientSpace Service Plans

ClientSpace has three service plans options: Bronze, Silver, and Gold. The plan you choose depends on how much extra personalized assistance with a ClientSpace Representative you require. For instance, if you are newer to ClientSpace, you might start out with a Gold service plan. Later, once you are more comfortable using ClientSpace, you might switch to a Bronze plan.

Some of the benefits of the various plans include:

- Monthly (Gold) or Quarterly (Silver) "check-in" calls with a ClientSpace Representative.
- Assistance setting up unlimited workflow channels (Silver and Gold).
- Assistance creating new dataforms, fields and links (Silver and Gold).
- Up to 4 hours per month of report configuration assistance (Silver) or unlimited report configuration assistance (Gold).
- Unlimited "How To" questions (Silver and Gold).
- Defect reporting and version updates (All Plans).

Detailed Service Plan Breakdowns

Review the complete list of offerings broken down by service plan option in the chart below:

Service	Details	Bronze	Silver	Gold
Application Tech Support	• Defect reporting and repair • Version update deployment	✓	✓	✓
Service Experience	• Assigned Product Consultant • ClientSpace Review Call		Quarterly	Monthly
Ongoing Quality Assurance Monitoring	• Proactive monitoring and reporting of exceptions • Proactive monitoring and reporting of data/application interfaces		✓	✓
Process Configuration **	• Setup and maintenance of workflow channels - e.g., to create cases, tasks, notifications and dataform records • Configuration of additional email templates & core business rules on individual data forms		✓	✓
Data Collection and Presentation	• Creation of new dataforms & maintenance of existing dataforms (field display conditions, configuring standard rules, setting up menu links) • Configuration of workspace landing pages and user home pages using our built-in widgets and Business Intelligence Reports			✓
Reporting	• Business intelligence dashboard and report configuration		4 hr/mo	Unlimited
Help Desk	• General questions and "how to" cases.	1 hr/mo	Unlimited	Unlimited
Security Administration	• Department/Role Administration and User Setup • Report, Module, Workspace, and Organization-level Security Admin.		✓	✓
Consulting / Training	• Solution Design of Workflows, Reporting, CPR, etc. • Time spent preparing and conducting requested trainings			2 hr/mo

** *CS Service Plans do not include software development or other services not listed above. Any Consulting time to devise solutions is billable or counts toward allotment under Gold plan.*

How to Join a Plan

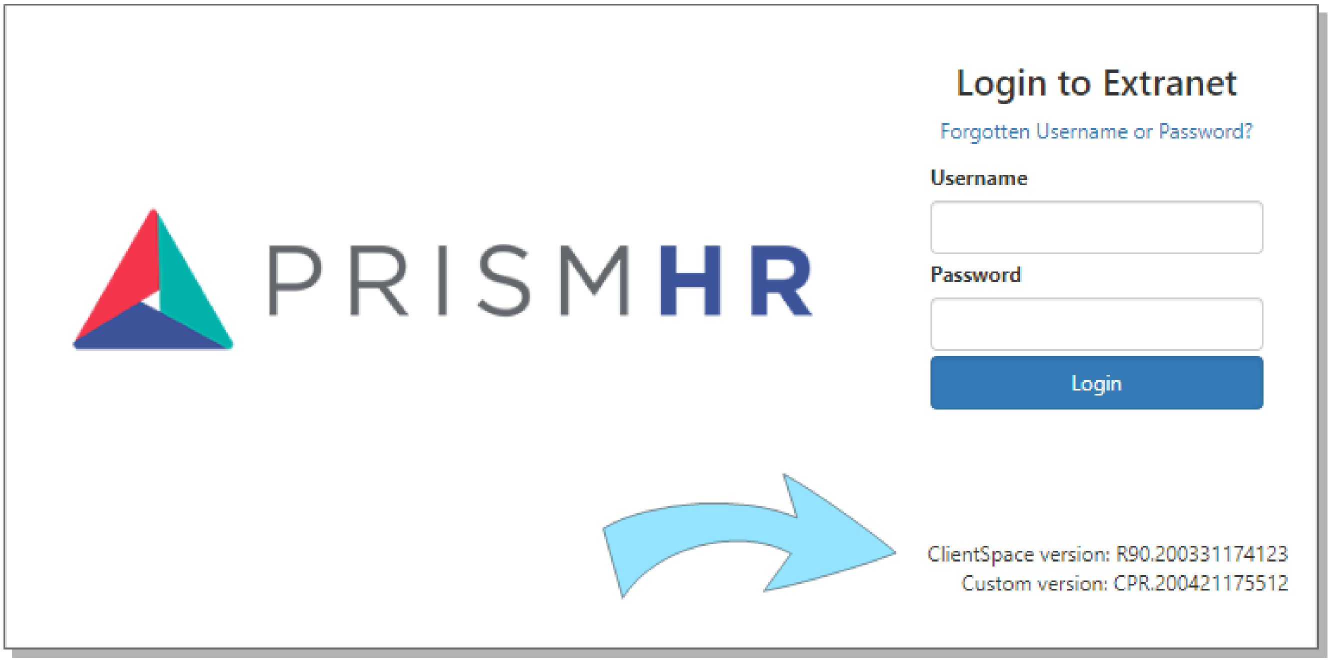
To join a plan, please contact your PrismHR CSM. If you have questions about our plans, please create an Extranet case.

Finding your installed ClientSpace version

Want to know which version of ClientSpace your company is using? Perform the following steps to find out.

To get the Core and PEO versions of your ClientSpace install:

1. Go to the ClientSpace login page.
2. In the lower right, you see the ClientSpace version information.



3. Compare this version information to the header of the release notes when reviewing release features and enhancements.
   - R## represents the release number.
   - The following numbers are the release date stamp.

For all other release related questions, or to schedule an upgrade for your install, log an Extranet case.

End User Foundations Video Series

End User Foundations is a series of videos designed to teach new users the basic skills they need to get up and running on ClientSpace. Each mini-course is designed to build on the next.

Learning how videos

1. Learning how: Logging In, Navigating and Accessing Key Components 23
2. Learning how: Using Home Pages, Announcements and Inbox 23
3. Learning how: Using the Calendar, Help Center, Workspaces and More 23
4. Learning how: Using Case Search and Help Links 23
5. Learning how: Creating Cases and Case Discussions 24
6. Learning how: Working With Cases, Tasks and More 24

1. Learning how: Logging In, Navigating and Accessing Key Components

In this first video of the "End User Foundations" series, you will learn how to log in, navigate and access key components of ClientSpace.

Video

View the video about Logging In, Navigating and Accessing Key Components.

2. Learning how: Using Home Pages, Announcements and Inbox

In the second video of the "End User Foundations" series, you will learn about Home pages, announcements and Inbox in ClientSpace.

Video

View the video about Using Home Pages, Announcements and Inbox.

3. Learning how: Using the Calendar, Help Center, Workspaces and More

In this third video of the "End User Foundations" series, you will learn about using the Calendar, Help Center, Workspaces, Organizations and the Client Master.

Video

View the video about Using the Calendar, Help Center, Workspaces and More.

4. Learning how: Using Case Search and Help Links

In the fourth video of the "End User Foundations" series, you will learn about using the Case Search feature and Help links.

Video

View the video about Using Case Search and Help Links.

5. Learning how: Creating Cases and Case Discussions

In the fifth video of the "End User Foundations" series, you will learn how to create Cases and Case Discussions.

Video

View the video about Creating Cases and Case Discussions.

6. Learning how: Working With Cases, Tasks and More

In the sixth and final video of the "End User Foundations" series, you will learn how to:

- Work with Cases
- Create Tasks
- Add Attachments and Activities
- Use the Quick Case feature

Video

View the video about Working With Cases, Tasks and More.

Learning how: Welcome to ClientSpace

Video

View the video about the Welcome to ClientSpace.

Learning how: Using the Help Center

Video

View the video about Using the Help Center.

Learning how: ClientSpace User Training Part 1

Video

View the video about ClientSpace User Training Part 1.

Learning how: ClientSpace User Training Part 2

Video

View the video about the ClientSpace User Training Part 2.

Asking for Help Using the Extranet

The Extranet is a custom version of ClientSpace used by PrismHR to track ClientSpace-related client interactions, support cases, development, and internal and external communications. The Extranet is a "Candy over CORE" solution for PrismHR with highly customized versions of some standard ClientSpace modules such as the Client Service Case and Business Intelligence modules. Access to the Extranet is restricted to a few key personnel at client sites. These are normally the principal stakeholders and other key delegates who also have authority to approve billable items related to ClientSpace within their organization.

Note: Access permissions to the ClientSpace Extranet are assigned on an individual basis. If there is a stakeholder or other delegate in your organization who needs access, please contact us. You can do this by asking an individual in your organization with Extranet access to submit a case or you can contact your ClientSpace Professional Services representative.

The ClientSpace Extranet is accessed from the ClientSpace Help Center page. If you cannot find the help you need in the ClientSpace Help Center, you can log a support Case or submit an Idea.

About Support Cases

Creating a support case allows you to communicate directly with the ClientSpace team. A common reason for submitting a case is when you encounter an issue in ClientSpace that prevents or hinders your work. For instance, you've encountered an error message that you are unable to resolve on your own by reviewing the error message details. However, you can also submit a case to ask a question, request a demo, inquire about our service plans and more.

About Ideas

Submit an Idea when you want to suggest an enhancement. Our team reviews Idea submissions to determine what problem can be resolved by adopting the enhancement. Therefore, the more detailed you can be with your submission, the better. Think about and describe the details of your Idea and how this idea might relieve or resolve an issue you are having. Consider a priority rating for your idea and attach any screen shots that may help us better understand the problem and proposed solution.

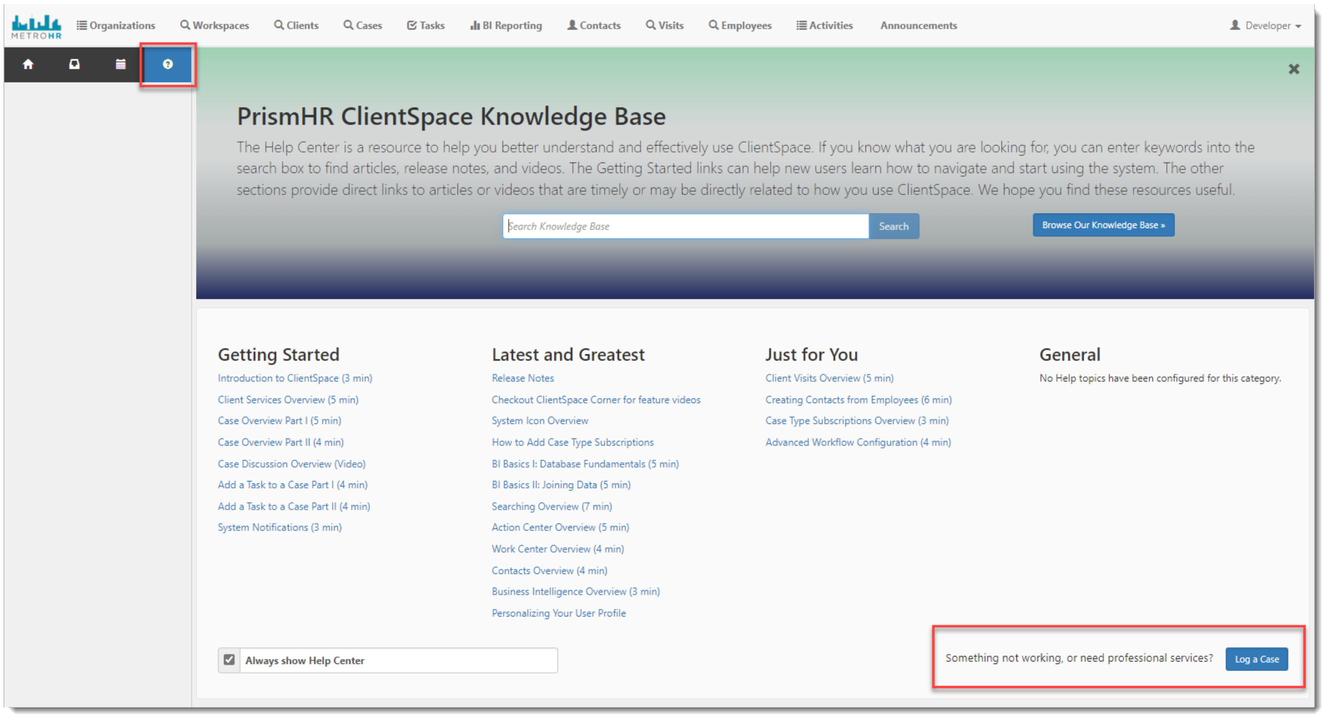
Accessing Extranet Case Logging

To access the ClientSpace Extranet:

1. Log in to the ClientSpace Extranet.

2. Click **Log a Case** on the Help Center Page.

   Note: The Help Center page displays on load if you have the **Always show Help Center** checkbox flagged in the bottom left corner of the Help Center page. The Help Center Page can also be loaded from any place in ClientSpace by clicking the **Help Center** icon located in the **Work Center** menu):



Submitting Cases

To submit a ClientSpace Extranet Case:

1. Access Extranet Case Logging.
2. Click **Add** ➕ next to **Cases**.
   The Client Service Case: Add window displays with a default **Status** of New. **Reported By** auto-fills with your login name. **Case Owner** and **Assigned To** fields are blank. These fields auto-fill once you save the case.
3. Complete the following fields:

Priority	Select one of the following case priorities as applicable: • Critical (System Down or Major Work Stoppage) • High • Medium • Low
Subject	Enter a brief, one line description of the issue.

Issue	Add the issue details.
Attachments	Adding attachments is an optional step but is recommended as screen shots of error messages, error logs and other relevant attachments can help our team troubleshoot your issue more effectively. Follow these steps to add a file attachment: a. Click the **Attachments** panel. b. On the **Attachments** tab, click **Add** to upload a new file. The Upload File window displays. c. Click **Choose File**. d. Locate the file on your computer and click **Open**. The file name displays in the **File** field of the Upload File window. e. Optionally, you can provide **Description**, **Category**, and **Tags** information f. Click **Save** on the Upload File window. The Upload File window closes and the attachment file you just added is listed on the Attachments panel. You can click the file name or click (**Edit**) next to the attachment file name to view your file. **Note:** You can discard an uploaded file by clicking (**Remove**) next to the attachment file name.

4. Click **Save** or **Apply**.

Submitting Ideas

To submit a ClientSpace Extranet Idea:

1. Access Extranet Case Logging.
2. Click **Add** next to **Submit an Idea**.
   The Idea: Add window displays. **Reported By** auto-fills with your login name.

3. Complete the following fields:

Type	Select one of the following Idea types as applicable: • Documentation • Product
Title	Enter a brief, one line description of the idea.
Details	Add the idea details. For best results, be sure to add the following details: • A detailed description of the Idea. • If the Idea solves a problem, describe what the idea will solve and any proposed solution you are recommending. • Describe how this Idea will help make your job easier, increase your efficiency, minimize a frustration you were experiencing, etc. • Enter the priority level you would give this idea.
Attachments	Adding attachments is an optional step but is recommended if you have workflows, screens or other attachments that would help clarify your Idea submission so that we can better evaluate it. Follow these steps to add a file attachment: a. Click the **Attachments** panel. b. On the **Attachments** tab, click **Add** to upload a new file. The Upload File window displays. c. Click **Choose File**. d. Locate the file on your computer and click **Open**. The file name displays in the **File** field of the Upload File window. e. Optionally, you can provide **Description**, **Category**, and **Tags** information f. Click **Save** on the Upload File window. The Upload File window closes and the attachment file you just added is listed on the Attachments panel. You can click the file name or click (**Edit**) next to the attachment file name to view your file. **Note:** You can discard an uploaded file by clicking (**Remove**) next to the attachment file name.

4. Click **Save** or **Apply**.

Adding Additional Comments

Use the **Comments** section of a Case or Idea to add additional comments, review comments added by the ClientSpace team or respond to questions or comments added by the ClientSpace team.

To add or review comments on a Case or Idea submission:

1. Access Extranet Case Logging.
2. In the "Current Client Service Cases" grid, click (**Open**) next to a previously added Case or Idea.
3. Click **Add** in the **Comments** field.
4. Type your comments.
5. Click again in the **Comments** field to commit your changes.
6. Click **Save** or **Apply**.

Learning How: Creating a Case in the Extranet

Video

View the video about the Creating a Case Using the Extranet.

Chapter 2

Your User Profile

All ClientSpace users have a user profile. For some clients, the user profile is automatically imported from PrismHR or Salesforce. Administrators can also manually add user profiles. The user profile record contains the username that you use to access ClientSpace, along with a few identification fields (Name, Department, Job Title, Phone, Email). Additionally, the user profile has a few administrative and out of office settings.

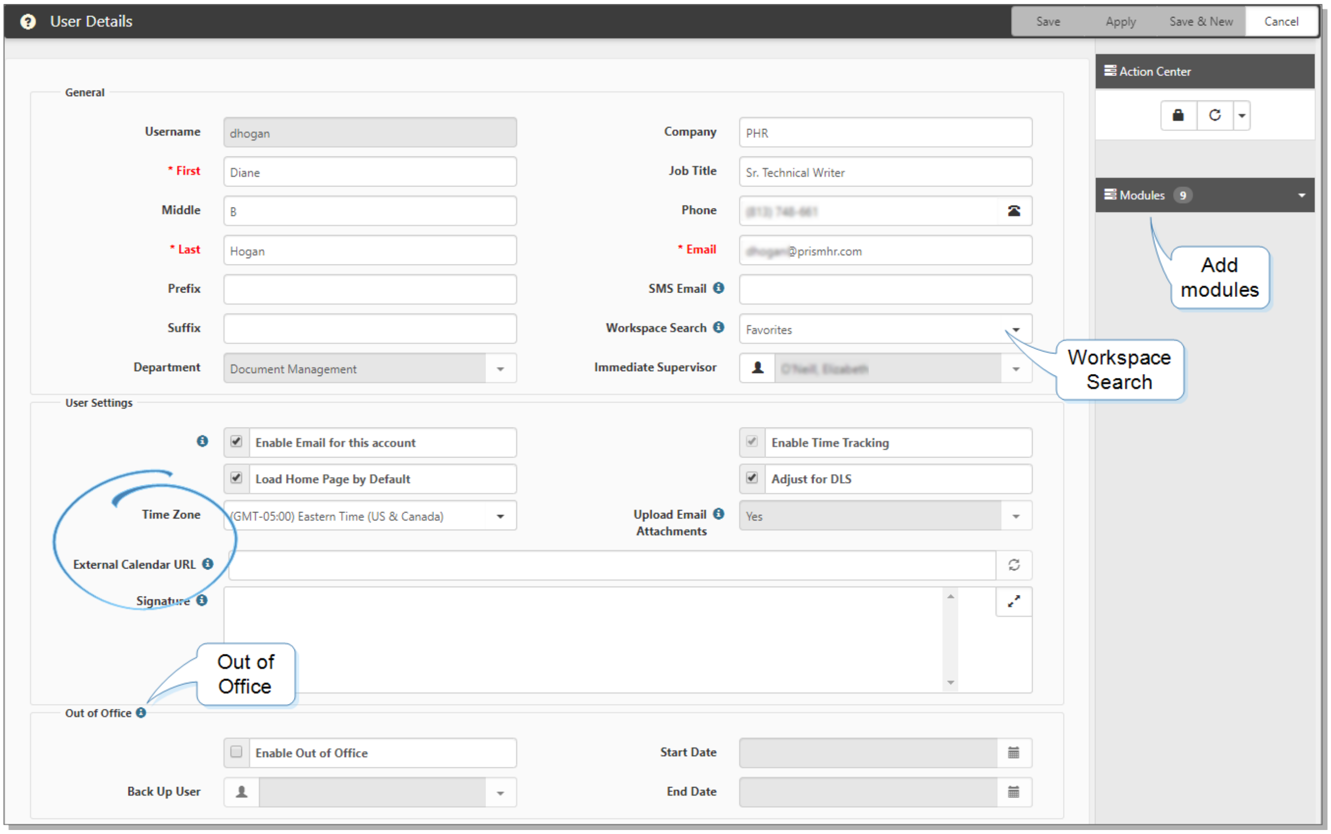
You can edit your user profile for some demographic information, enable out of office notifications, and add modules to the topmost banner bar of the application. Other edits are performed by administrators such as role assignment. Roles control user access (view, add, edit, delete, and admin) to various entities. See the topic *Adding and editing user accounts* in *ClientSpace Setup & Administration*.

Personalizing Your User Profile

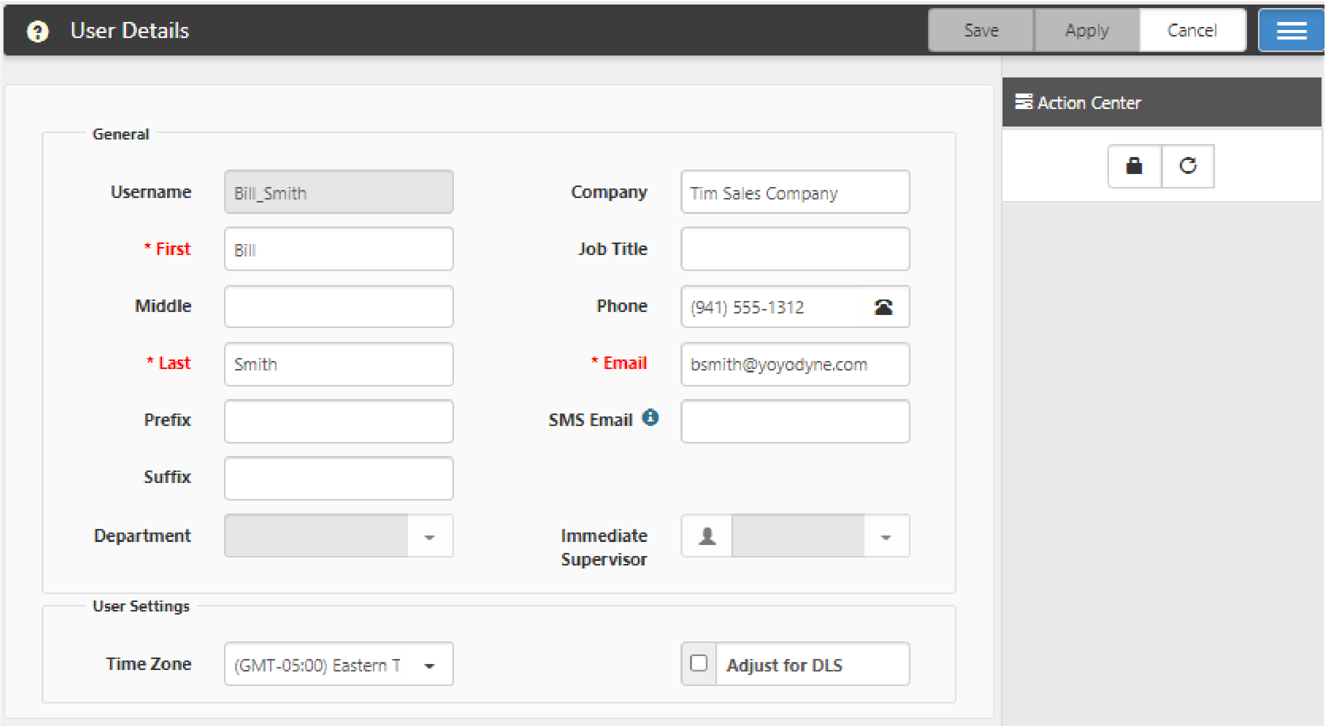
This topic discusses features that allow you to personalize your user profile. In addition to the basic demographic data, you can customize the profile so that the application functions the way you like. Let's look beyond the basic demographic information in the General area and focus on Workspace Search, Time Zone, External Calendar URL, and Out of Office fields.

To personalize your user profile:

1. Go to **username** > **My Profile**.
   The User Details form opens.
   The following graphic illustrates the User Details form for an Internal user.



The following graphic illustrates the user details for an External user.



2. Complete the form.

Note: Some of these fields/modules may not be available for external users.

Action Center:		
	Modules	You can add modules to your modules bar to provide enhanced functionality and navigation. You can also manage the order of modules that display in the modules bar. See User modules.
	Workspace Search	If your Home page contains the Workspace widget, you can set the default to Favorites or Recent Workspaces.
User Settings:		
	Enable Email for this account	Default is enabled. Enables email notifications to external email, such as Gmail or Outlook. **Note:** Keep in mind that if you disable this option and your email is used on a ClientSpace email template as an ad-hoc email recipient, you will not

		receive the email.
	Load Home Page by Default	Default is enabled (selected).
	Adjust for DLS	Automatically adjusts your calendar events to take daylight savings (DLS) time into account when setting the event time.
	Time Zone	Select a time zone. Default is Eastern Standard Time.
	External Calendar URL	Can be set to use the ICS file location for an external calendar such as Exchange and Gmail. External calendar events display as green and are not editable. This feature allows you to combine your external calendar with your internal system calendar. After you enter an external calendar URL in this field, you can click the **Sync** button (located on the right side of the **External Calendar URL** field) to send a request to connect to the external calendar and validate your settings. See Adding external calendar events for more information about selecting a calendar.
Out of Office:		
	Enable Out of Office	When you enable this option, you can: • Assign a **Back Up User** to receive your notifications for items such as cases and tasks while you are away. • Establish a **Start Date** and **End Date** for your out of office period. • Reassign your cases and tasks to the Back Up User while you are away. **Note:** Case and task reassignment requires your Global Admin to enable the **Reassign**

		During Out Of Office feature. This feature is an optional enhancement to the **Enable Out of Office** feature which can be set in the PEO Configuration. When enabled, in addition to the **Back Up User** receiving notifications of new cases and tasks, new cases are reassigned to them while you are away. If the assigned OOO backup user is also marked "out of office" or is expired, inactive, or lacks appropriate case type access, ClientSpace then evaluates Case Type default backup assignment settings to determine an appropriate reassignment path. See Enabling Out of Office option.
Administrator Settings: **Note:** Only Global Admin users can maintain the Administrator Settings.		
	Global Admin	Select to establish the user with admin rights to ClientSpace.
	Password Never Expires	Select this option to indicate that your Global Admin user password never expires. If you select this option, the system disregards the **Password Reset** password settings. If you do not select this option, the system uses the value in the **Password Reset** password settings to determine when your user password expires. See Configuring your ClientSpace authentication settings.
	Change Password Next Login	Select this option to require the user to change their password on the next login.
	Can Create	Select this option to allow the user to create

	Workspaces	workspaces.
	Send Escalation Email	Enables users to select whether to receive escalation notices for tasks in the system.
	Send Account Info Email	When this field is selected, the user receives an email with their username and login instructions.
	User Type	Auto-filled when using a Template User.
	Default Workspace	Available when User Type = External. Determines the workspace an external user will be directed to after logging in.
	Date to Expire	Set a date to expire the user account.
	Authentication Type	Auto-filled when using a Template User.
	Domain	This field is available when Authentication Type = Active Directory. Select an Active Directory Domain for this user.
	Reporting Profile	Auto-filled when using a Template User. Used for Business Intelligence reports. See Configuring security in Business Intelligence reporting.
	Notes	Auto-filled when using a Template User.

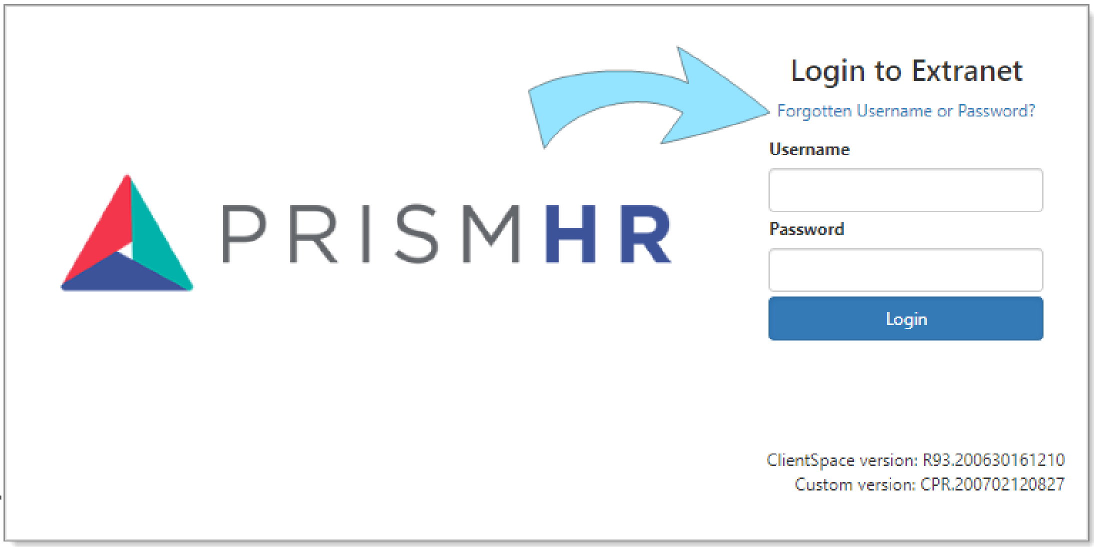
Video

View the video "Out of Office" Notifications and Other User Profile Personalization Settings.

Changing your password

You can change your password from the ClientSpace login screen and My Profile after you are logged in.

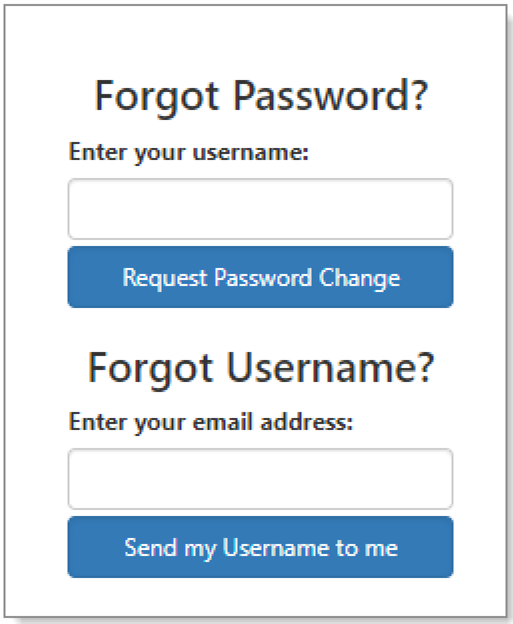
From the ClientSpace login screen



Changing your password from the ClientSpace login screen sends an email to your external email mailbox, such as Gmail or Outlook. For ClientSpace to send the email, you must have **Enable Email for this account** enabled in your ClientSpace user profile. **Enable Email for this account** is how you can receive ClientSpace notifications in your external email mailbox. If this option is **not** enabled in your user profile, then resetting your password from the login screen will not work. You may need to contact your ClientSpace administrator for assistance.

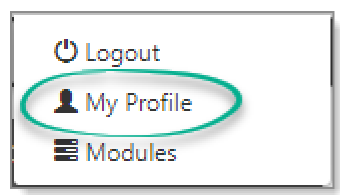
To change your password from the ClientSpace login screen:

1. Click **Forgotten Username or Password?** (see the previous image).
   Forgot Password and Forgot Username appear.



2. To change your password, in **Enter your username**, type your ClientSpace username, and click **Request Password Change**.
3. To request your ClientSpace username, in **Enter your email address**, type your email address (for example, for Gmail or Outlook), and click **Send my Username to me**.
4. Go to your email mailbox, open the email, and follow the instructions.

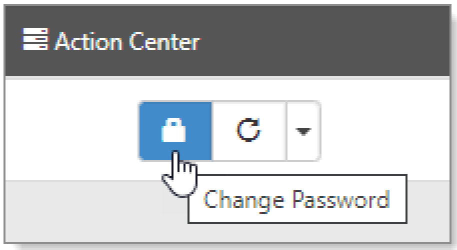
From My Profile



After you successfully login to ClientSpace, you can change your ClientSpace password from your user profile.

To change your password from My Profile:

1. Go to **My Profile**.
   The User Details form opens.
2. In the **Action Center**, click (**Change Password**).



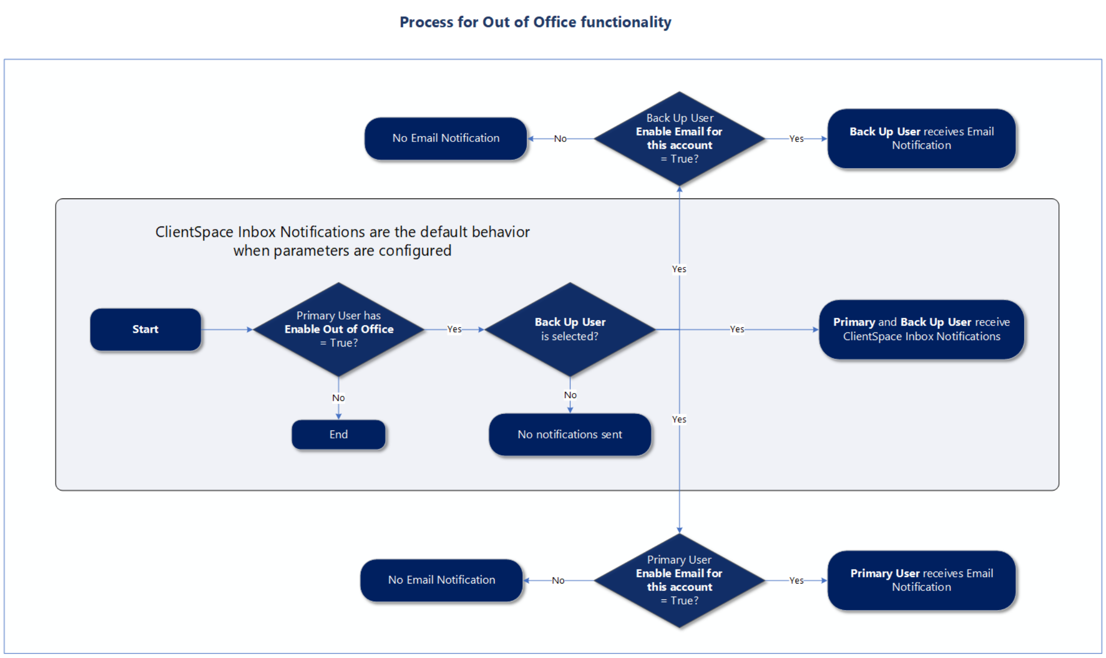
The Change Password dialog box opens.

3. Complete the fields:

Current Password	Enter your current password.
New Password	Enter your new password. Follow your organization's requirements for minimum length and complexity.
Confirm Password	Enter your new password again.

4. Click **Ok**.
5. Click **Save**.

Enabling Out of Office option



Sometimes you have to be out of the office, and you need someone to follow up on items that you may be assigned. The **Enable Out of Office** option allows you to specify a back up user while you are away. The back up user will receive notifications from Dataforms, Org and Activity notifications, Email Template notifications, and the Task Manager. The Out of Office functionality initiates when notifications are sent. Notifications are sent to your ClientSpace Inbox **and** can also be sent as an email to your external mailbox. You can utilize both methods or choose to only receive notifications in the ClientSpace Inbox.

When the Send Email process is run, the backup user will be identified and the notification will be sent to that user.

Note: The **Reassign During Out Of Office** feature, an optional enhancement to the **Enable Out of Office** feature, can be set in the PEO Configuration so that in addition to the **Back Up User** receiving notifications of new cases and tasks, new cases are reassigned to them while you are away. If the assigned OOO backup user is also marked "out of office" or is expired, inactive, or lacks appropriate case type access, ClientSpace then evaluates Case Type default backup assignment settings to determine an appropriate reassignment path.

Out of Office - Back Up User "Introduction" Email Template

The Out of Office option uses the **OOOBackUpUser: Back Up User - Out of Office Notification** email template. The system uses this template to notify a user when they have been assigned as a backup user for another user who is out of the office. This template includes:

- **Subject**: Back Up User for **User Name**
- **Body**: You have been set as the Back Up User for **User Name**. Notifications for this user will be sent to you while they are Out of Office from x/xx/xxxx (**Start Date**) to x/xx/xxxx (**End Date**).

Sending notifications to the ClientSpace Inbox

To send notification to the ClientSpace Inbox, the primary user **only** needs to enable the option **Enable Out of Office** in their user profile and select a **Back Up User**. That is all there is to it!

When the back up user receives a ClientSpace Inbox Notification, the subject line of the notification includes the first and last name of the user to back up.

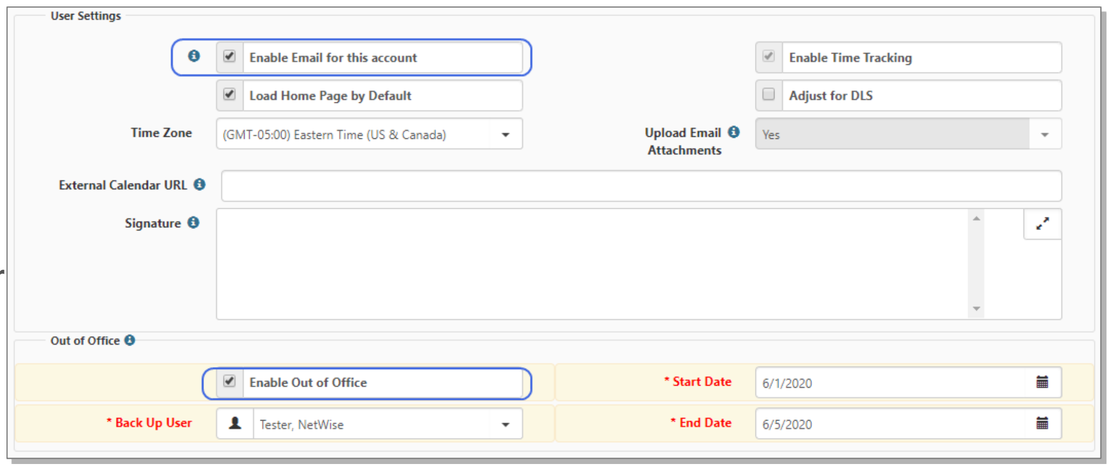
To enable out of office notifications to the ClientSpace Inbox:

1. Go to **My Profile**.
   The User Details form opens.
2. Select the **Enable Out of Office** option.
   The Back Up User, Start Date, and End Date fields become available.

3. In **Back Up User**, select a user to receive your notifications.
4. Select a **Start Date** and **End Date** for the notifications.
5. Click **Save**.

In the banner bar, the user profile icon turns red during the time you specified Out of Office and displays **ZZ**, symbolizing that this user is out of the office and unavailable.

Sending notifications to an external Email mailbox



To send a notification to an external email mailbox, the recipients must have the option **Enable Email for this account** enabled. However, if you only want one of the recipients to receive the external email notifications, then you only need to enable the option for one, for example, the primary user.

If you want both the primary and back up user to receive external email notifications, then both must have the option **Enable Email for this account** enabled. The back up user's email does not display on the record in the Email Admin dashboard. Instead, when the Send Mail scheduled process runs, it checks the recipients of the unsent email.

To enable out of office to an external Email mailbox:

1. Go to **My Profile**.
   The User Details form opens.
2. Ensure that **Enable Email for this account** is selected.
3. Select the **Enable Out of Office** option.
   The Back Up User, Start Date, and End Date fields become available.
4. In **Back Up User**, select a user to receive your notifications. **Note**: If you want the back up user to receive an email in their external mailbox, then ensure that the designated Back Up User also has

Enable Email for this account enabled in their User Profile. The back up user always receives a ClientSpace Inbox notification.

5. Select a **Start Date** and **End Date** for the notifications.
6. Click **Save**.

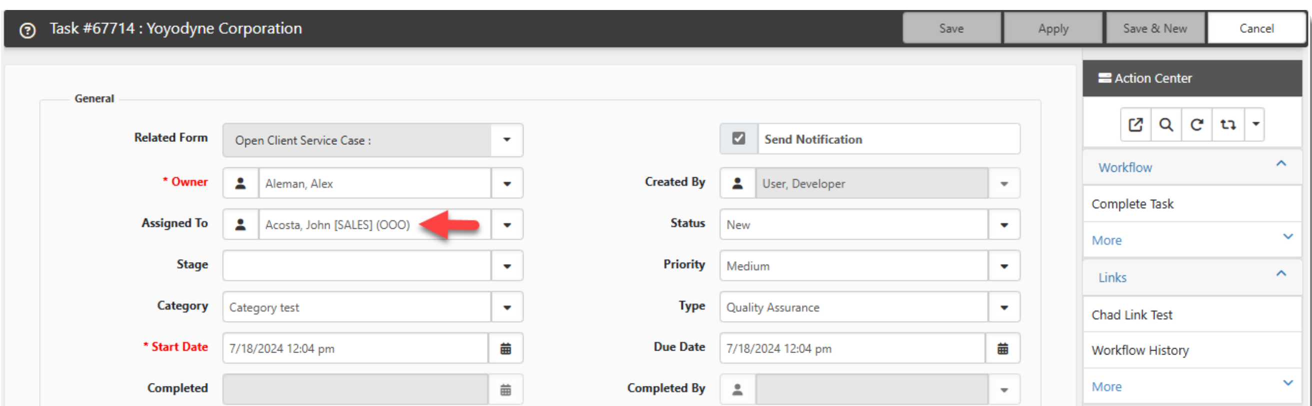
In the banner bar, the user profile icon turns red during the time you specified Out of Office and displays a **ZZ**, symbolizing that this user is out of the office and unavailable.

What happens next

If a system event occurs that sends a notification to you, such as a case or task assigned to you, the notification is forwarded to the user you selected in **Back Up User**. Both the primary and back up user receive the notifications in their ClientSpace Inbox. The subject is pre-pended with **Out of Office**.

Let's say that you select John Smith as your Back Up User. When a notification is issued that is meant for you, John Smith receives a ClientSpace Inbox notification from you. If you enable notifications to an external mailbox, email notifications are also sent to the users that have the option **Enable Email for this account** enabled.

Additionally, "OOO" is appended to your name in all CORE user drop-down lists throughout ClientSpace as a visual indicator to other users that you are unavailable to respond to assigned cases or tasks:



Disabling out of office

When you return to the office and are ready to disable the out of office function, you can disable the option or allow the expiration to complete, based on the end date.

To disable out of office notifications:

1. Go to **My Profile**.
   The User Details form opens.
2. Clear the **Enable Out of Office** option.
3. Click **Save**.

Video

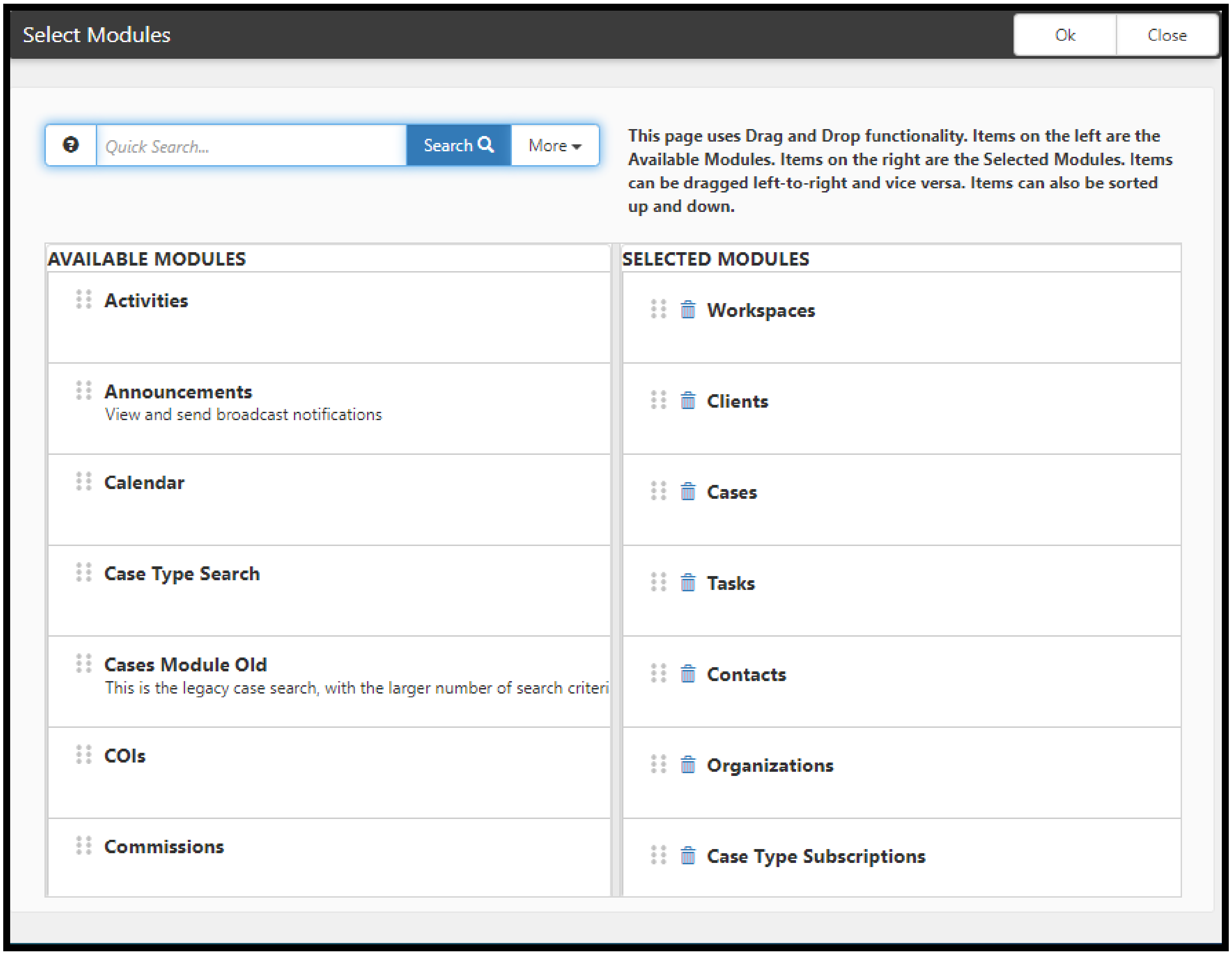
View the video "Out of Office" Notifications and Other User Profile Personalization Settings.

Adding user modules

User modules are selectable modules that you can configure by adding modules that you use most often to the modules bar. The modules bar is located at the top of the workspace, providing quick access to your favorite modules.

To add modules to your user profile:

1. On the modules bar, on the right side, click **<username>** > **My Profile**.
   The User Details form opens along with the Action Center panel on the right.
2. In the **Action Center**, click **Modules** > **Select Modules**.
   The Select Modules dashboard opens.



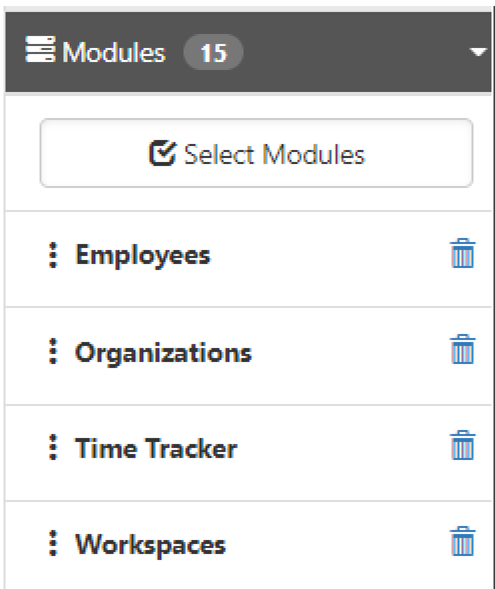
3. Review the modules in the **Available Modules** list and locate the module to add.
4. To move the module to the **Selected Modules** list, complete the following drag and drop method:
    a. Place the mouse cursor over the module name in the **Available Modules** list.
    b. Press and hold down the left mouse button.
    c. Move the mouse toward the **Selected Modules** list while still holding down the left mouse button.
    d. Move the module up or down in the **Selected Modules** list. When you have moved the module to the desired location, let go of the mouse button.
5. Click **Ok**.
   You are returned to the User Details screen. Your new module is listed in the Action Center, in the Modules group.

6. Click **Apply** or **Save**.

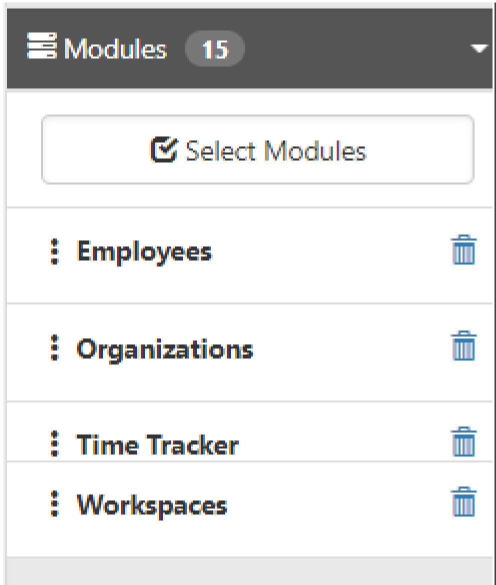
To manage the order of the modules that display in the Modules bar:

1. Review the current order of the modules that display in the Modules bar.

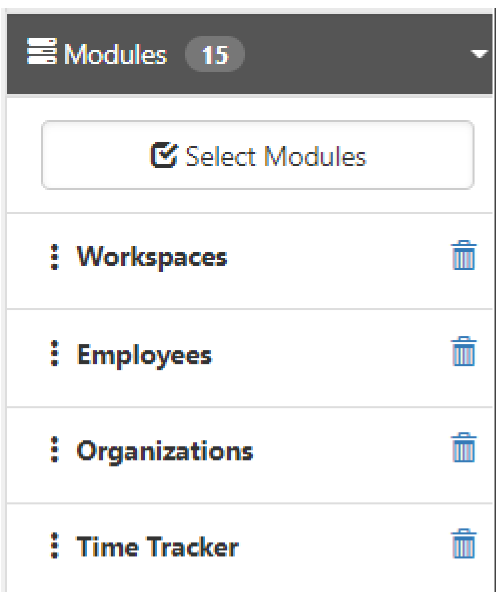
2. The top to bottom module order in the **Modules** panel of the **Action Center** on the User Details dashboard determines the left to right module order in the Modules bar. Review the modules in the **Modules** panel and locate the module to move up or down in the list (for example, **Workspaces**).



3. To move the module, complete the following drag and drop method:
   a. Place the mouse cursor over the module name.
   b. Press and hold down the left mouse button.
   c. Move the mouse up or down while still holding down the left mouse button.



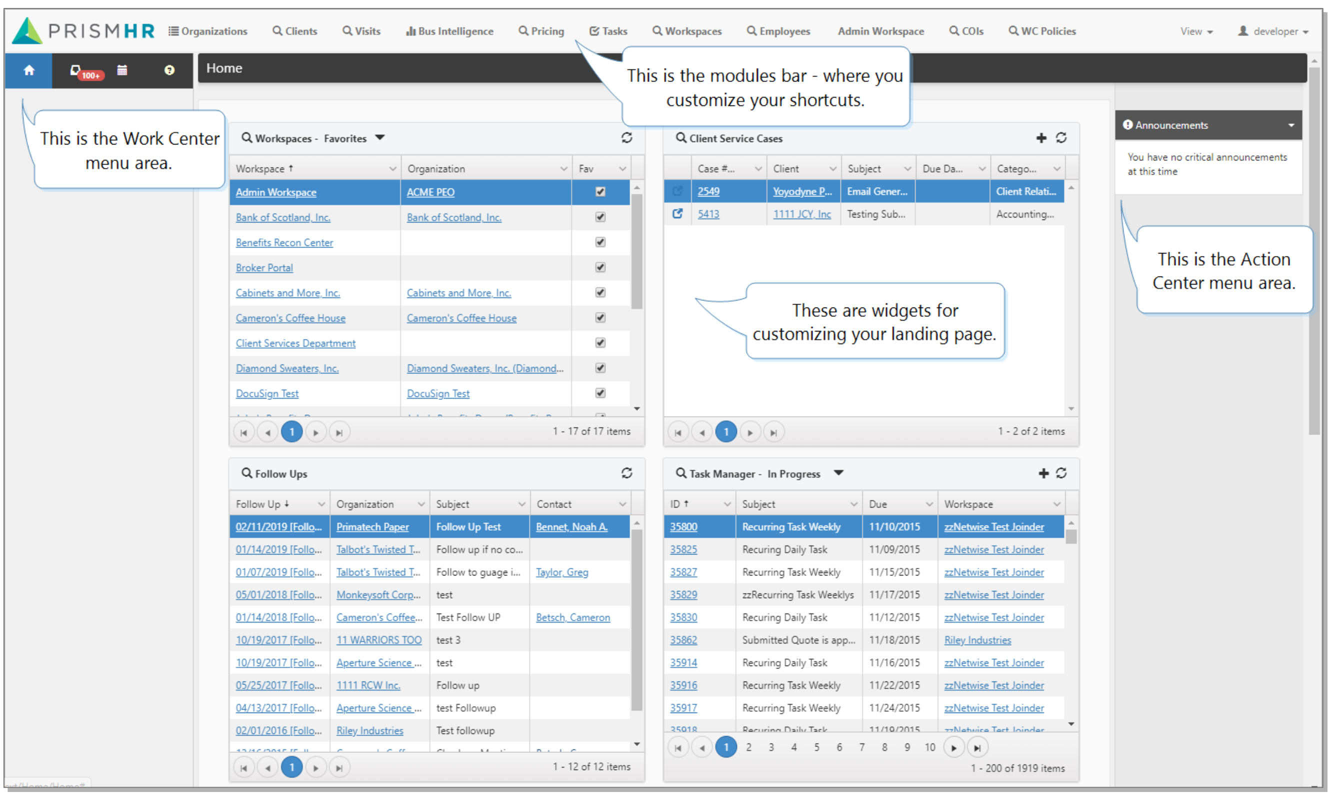
d. When you have moved the module to the desired location, let go of the mouse button.



4. (Optional) Repeat step 3 for additional modules as necessary.
5. Click **Apply** or **Save**.
   The modules in the modules bar update to reflect the changes.

Chapter 3
Navigating ClientSpace

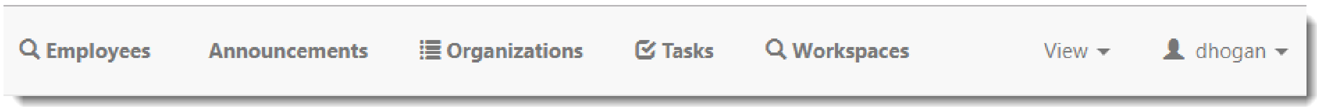
ClientSpace provides a functional yet elegant interface that is cross-browser compatible, supports multitasking, and is easy to use. ClientSpace delivers powerful functionality that is evident in the menu panels of the main work area. The menu panels comprise the navigation panes on the left and right of the main work area: Work Center and Action Center. The panes enable multitasking using the standardized toolset across the application, so that all areas within the application are functionally the same.



The following topics describe the ClientSpace icons, how to add user modules, use the Work Center and Action Center menus, and search dashboards.

User modules

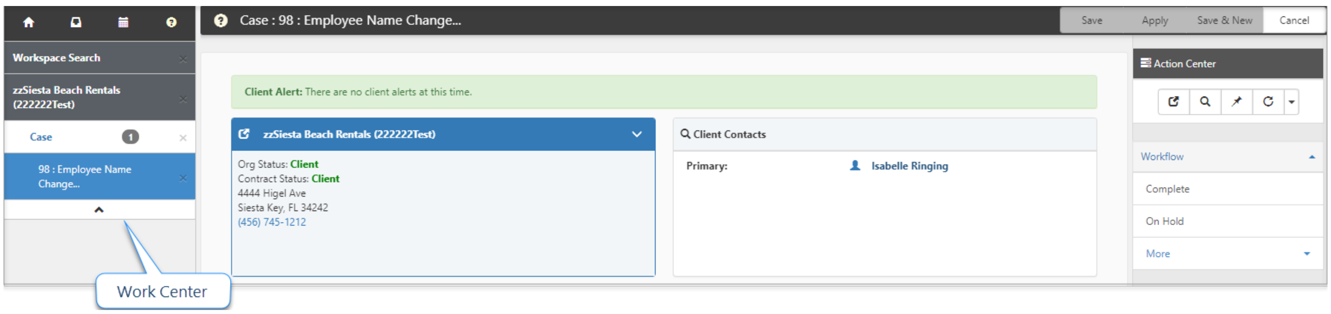
User modules are shortcuts that you can add to the modules bar, which is located at the top of the ClientSpace workspace. The modules bar is configurable so you can add, remove, and reorder your preferences. When the width of the modules selected exceeds the amount of available space, any leftover modules overflow and are available from the View menu beside the module buttons.



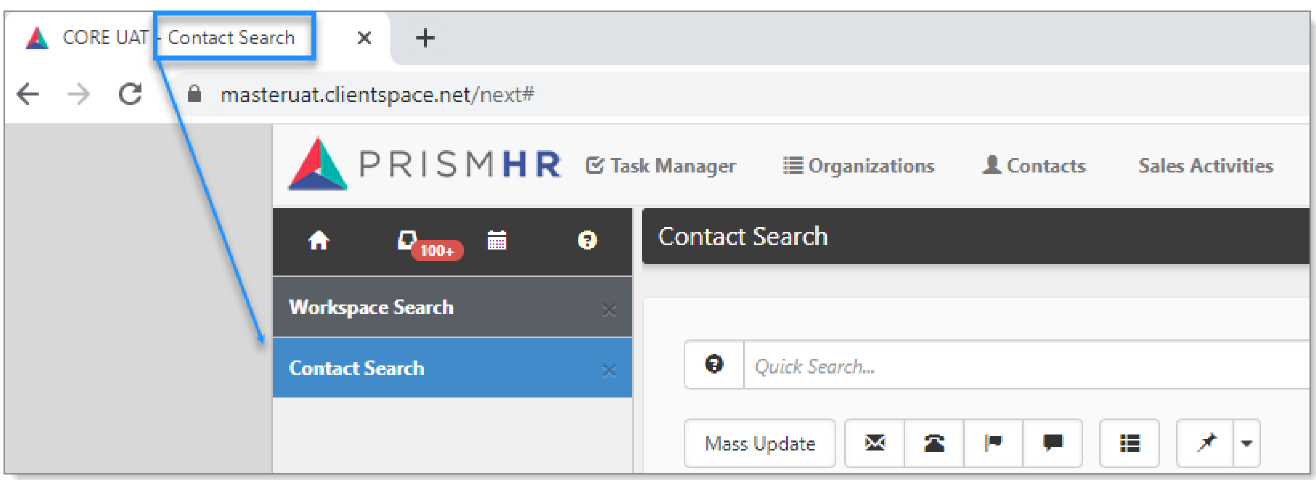
When you select a module, such as Workspace, a search dashboard opens. For more details, see Search dashboards.

Work Center

ClientSpace clients work with many pieces of information and realize that multitasking is essential. The ClientSpace design provides multitasking capabilities through the Work Center, located on the left side of the application. The Work Center menu is your primary tool for multitasking – it provides a hierarchical display of multiple open workspaces and work items at any given time.

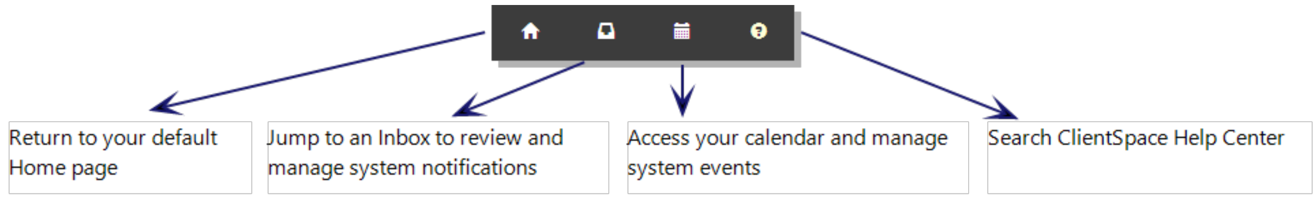


To simplify navigation, when you have multiple ClientSpace browser tabs open, the tabs reflect the active work item. For example, if Contact Search is the active work item, then your browser tab will reflect the same. This feature helps you to quickly identify where you want to go when you have multiple browser tabs open.



Work Center icons

At the top of the Work Center, you see the icons Home, Inbox, Calendar, and Help.



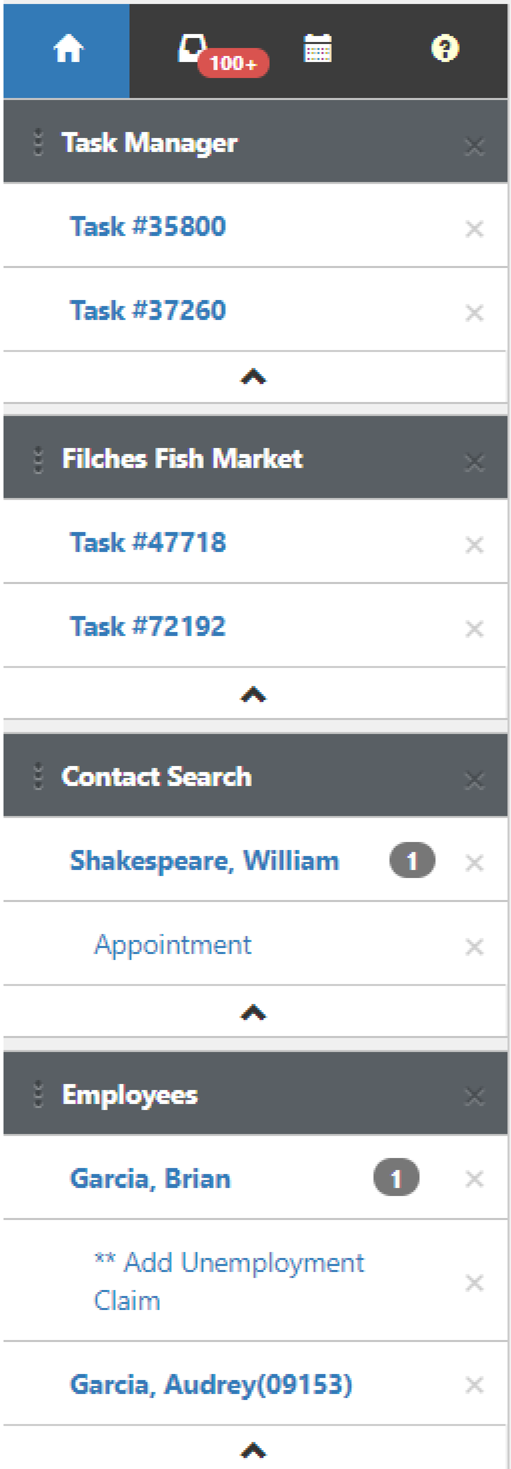
Below the icons, as you navigate and open forms and dashboards, you will see Work items, Sub-items, and Work item sets.

Work items

A work item is any item that opens under the menu on the left side of your browser. These can be various modules that you open from the top modules bar. As you open them, you see that it creates unique work items. If you try to open a second copy of a work item, the system lets you know that you already have that item open and asks if you would like to navigate to the existing item or create a new copy.

Work item sets

Work items are organized as separate levels, where the topmost level known as **sets** provides multiple **thread** and **sub-thread** items. Thread items are indented below the set of items, and sub-thread items are further indented below threads. You can rename a set and you can drag and drop a set to a different location within the Work Center.



Sets are the topmost levels, represented by the dark shaded bars. The example shows four sets: Task Manager, Filches Fish Market, Contact Search, and Employee.

Threads are displayed under the Sets and are the individual cases or tasks opened from their respective set. Threads display a count of the associated open sub-thread items. In the example, a thread count is associated with Contact and Employee.

Sub-threads display under a Thread. An example of sub-threads would be a task opened from one of the cases, or a time tracking item opened from a task.

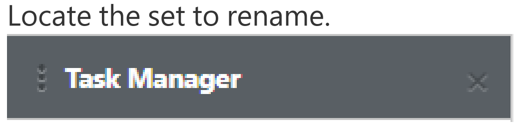
Work items appear as you open cases, tasks, workspaces, organizations, and contacts. They represent open cases, tasks, lists, and so on.

To navigate work items:

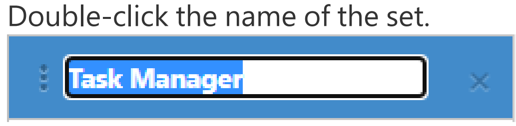
- To view an open item, select an entry.
- To close an open item, click **X**.
- To collapse the space at the bottom of each set, click ^ (caret symbol).

To rename a set:

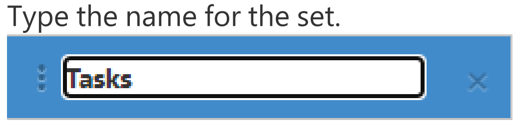
- Locate the set to rename.



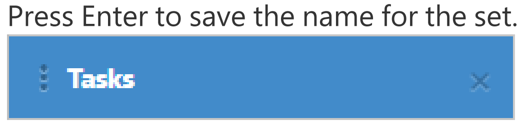
- Double-click the name of the set.

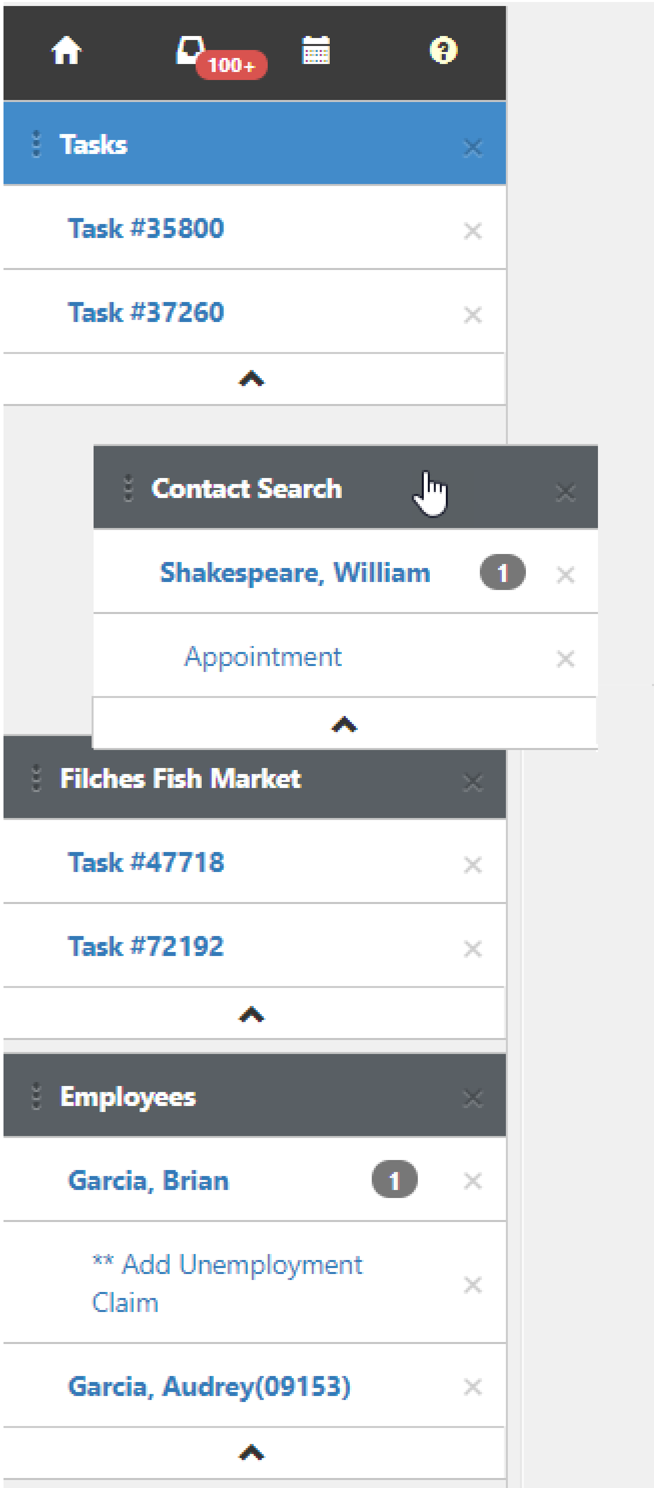


- Type the name for the set.



- Press Enter to save the name for the set.

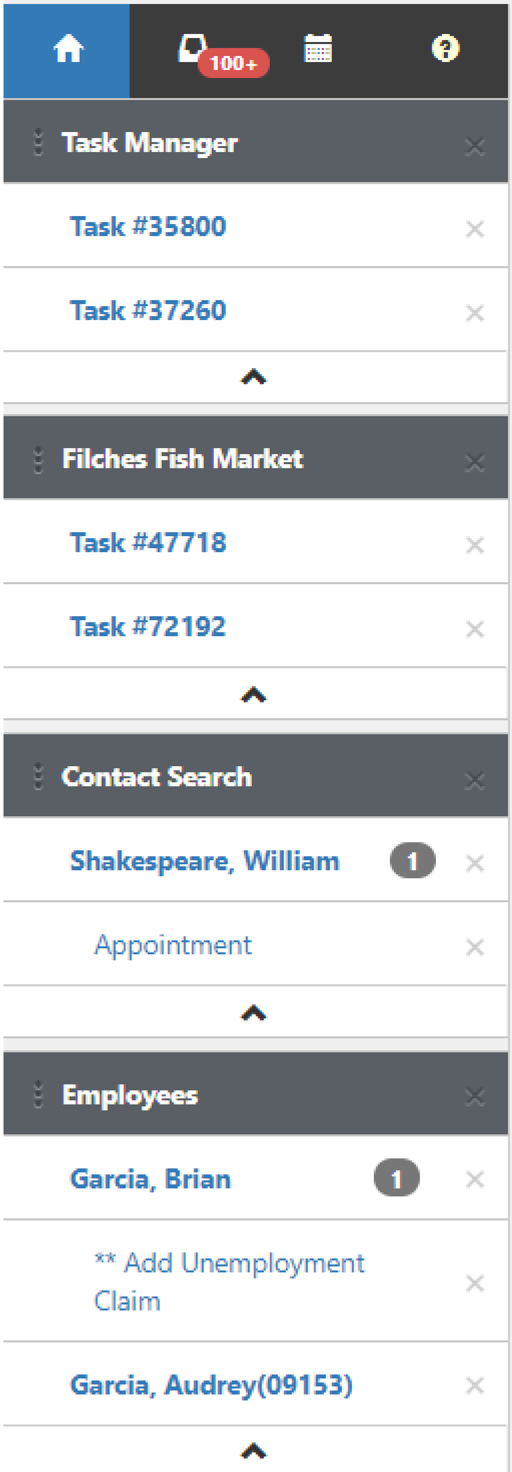


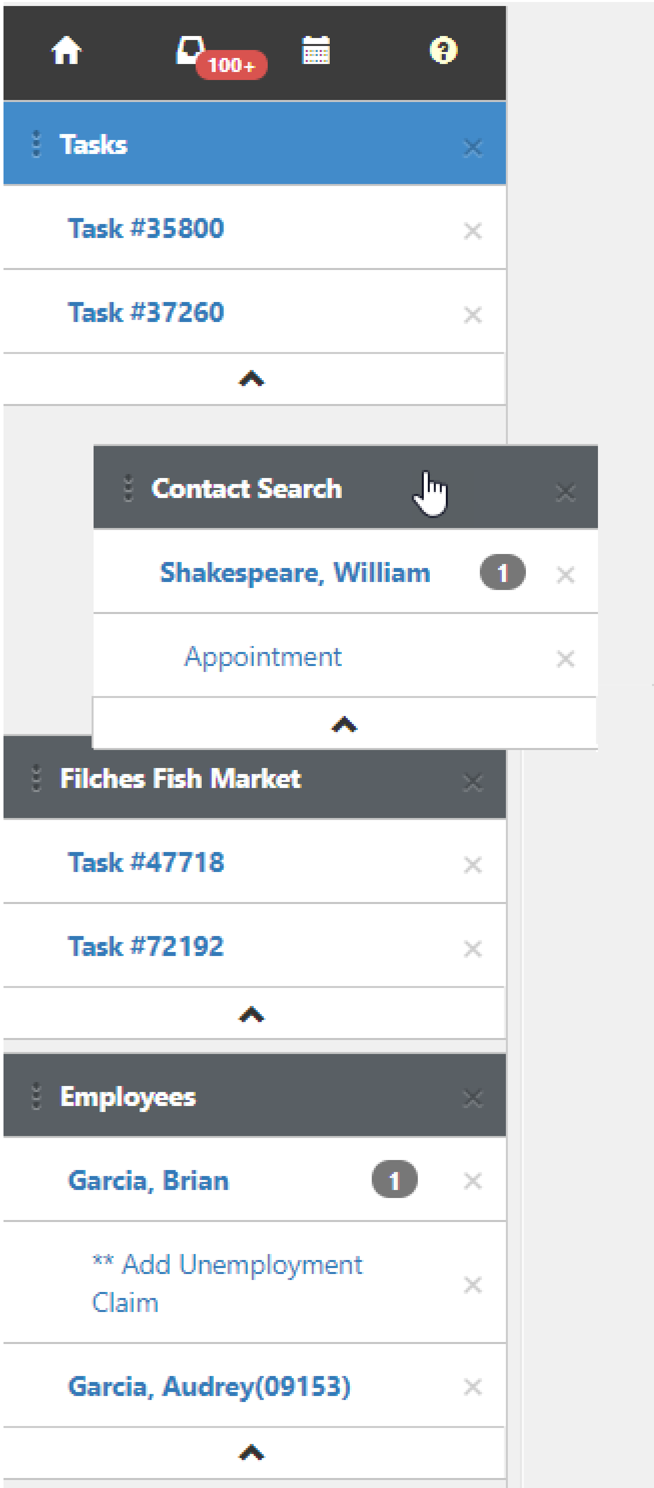


To drag and drop work item sets within the Work Center:

- Identify a work item set to drag and drop to a different location within the Work Center.
- Using the mouse, move the pointer and hover over the work item set that you want to move.
- Click and hold the mouse button (the pointer changes to a hand)
- Drag the work item set to a different position in the Work Center and position the set above or below another set as desired.
- After dragging the work item set to the desired location in the Work Center, release the mouse click to drop the set to the new location.

Note: The changes that result from renaming a work item set or dragging and dropping a work item set do not persist after a refreshing the screen (pressing F5).

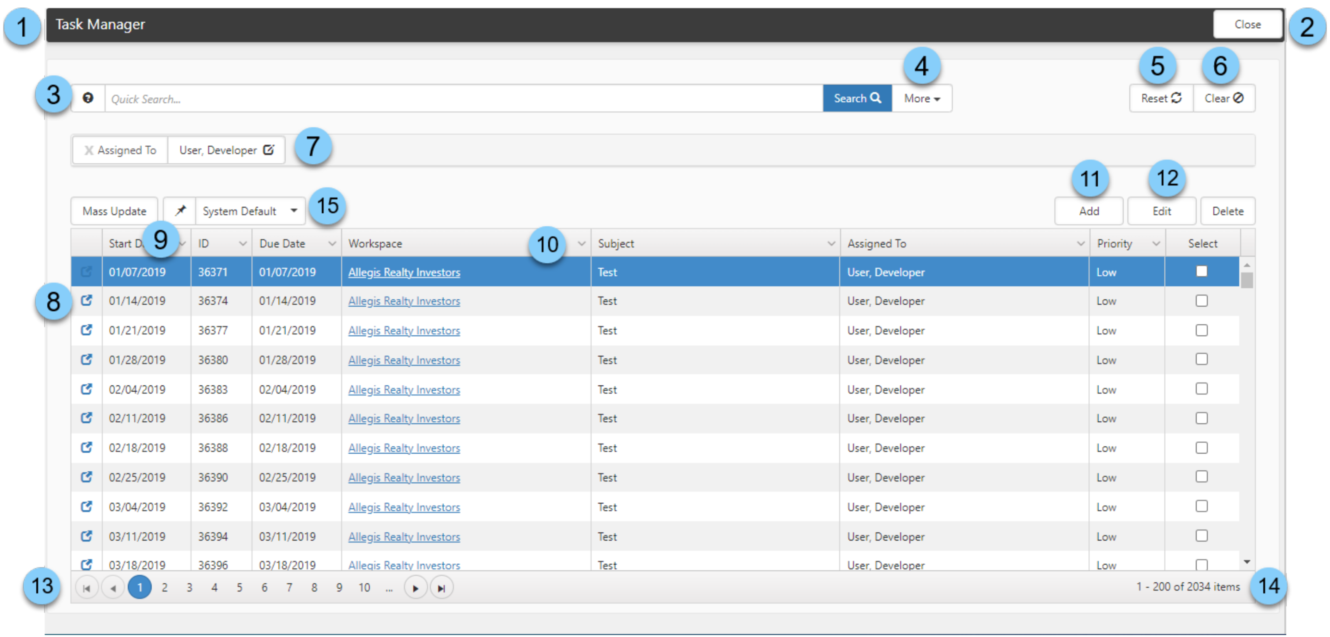

100+
Task Manager
Task #35800
Task #37260
Filches Fish Market
Task #47718
Task #72192
Contact Search
Shakespeare, William
1
Appointment
Employees
Garcia, Brian
1
** Add Unemployment Claim
Garcia, Audrey(09153)


100+
Tasks
Task #35800
Task #37260
Contact Search
Shakespeare, William
1
Appointment
Filches Fish Market
Task #47718
Task #72192
Employees
Garcia, Brian
1
** Add Unemployment Claim
Garcia, Audrey(09153)

 Watch the Work Center video to understand how you can use work items to navigate the application and work more efficiently.

Search dashboards

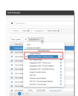
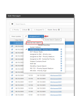
From the Case search dashboard to Task management, search dashboards in ClientSpace all work in a similar fashion. If you understand one, you understand them all. Usually, search dashboards are presented after you select an entry from the System Administration dashboard or from module in the modules bar (see User modules). The following example (Task Manager) provides everything you need to know to be a search dashboard expert.



The numbered items in the image correspond to the following window elements:

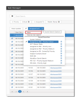
1. Name	The name of the record type you are selecting.
2. Close	Done working with these records? Click to close the window and remove this from your Work Items list.
3. Search	Everyone has their preferred way of searching, but some key areas are searched so often that we made them part of the default keyword search. Pause on the **?** icon for a list of these fields and some search hints. **Quick Search fields:**

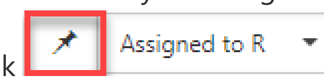
	• Workspace Name (starts with) • Organization Name (starts with) • DBA Name (starts with) • Status (starts with) • Client Number (equals) **% Search Fields:** • Organization Name
4. More	If quick search does not provide the results you need, you can add additional search parameters under the **More** search area.
5. Reset	Click **Reset** to restore the dashboard view to the pinned search settings. The dashboard is reset to the saved and pinned, user-defined search if present. If there is no user-defined, pinned search set as the default dashboard view, the System Default view is restored.
6. Clear	Are you looking for something and the default filters are causing it to not display? Click **Clear** to clear all the currently applied filters and run an unfiltered search. For installations with large numbers of records, unfiltered searches can sometimes select too many records and cause poor performance.
7. Filter chiclets	The current set of filters applied to the records list is displayed in a series of chiclets found below the search bar. Some filters can be removed as indicated by an **X**.
8. Jump	Jump allows you to jump directly to the selected record, the same as clicking **Edit**. This is useful when accessing the application from a mobile device.
9. Sort	Click the column header of a list to sort the records by that column. The arrow indicates the direction of the sort, ascending or descending.
10. Expand list / Manage column	The inverted carat allows you to access a list of columns that may be added or removed to customize your list view, displaying only the columns you want. This customization is lost when you close the list.
11. Add	Click **Add** to create a new record.
12. Edit	Click **Edit** to edit the selected record. If no record is selected, you receive an error message indicating you must select a record to continue.

13. Paging	Did you pull back a lot of records? Need to see the ones that are not currently displayed in the list? Use paging to move to more records in the set.
14. Record count	Displays the total number of records that match your current filter set.
15. Search Library	The Search Library allows you to save up to twenty filter and list configurations, including More Search, Quick Search, and column configurations (such as column width adjustments and column sorting). **Note:** The System Default search displays in the Search Library but does not count toward the twenty user-defined searches that you can create. The System Default search can be temporarily edited for purposes of creating a new search based on the default dashboard settings, but you cannot permanently modify or delete the System Default search. • When a user-defined, saved search is not pinned as the default view, the System Default search is automatically pinned as the default view. • The System Default search always displays at the top of the Search Library whether it is pinned or unpinned. If a user-defined, saved search is pinned as the default view, it displays below the System Default search and all remaining user-defined searches display below it in alphabetical order.  • To create a new search, you can start with the dashboard in any state (i.e., unfiltered, in System Default view, or with an existing user-defined, saved search displayed). Use More Search, Quick Search, and column configurations to customize the dashboard and then select **Save as a new search** from the **Saved Search Options** list.  When the Name Saved Search window displays, enter a name for your new search. **Note:** This field accepts up to 50 characters and allows special characters such slashes and quotation marks. Optionally, click **Pin This Saved Search** to simultaneously save and pin

the new search as the default dashboard view before clicking **Save Search**.

- To update an existing search, use More Search, Quick Search, and column configurations to customize the dashboard and then select **Save** from the **Saved Search Options** list.

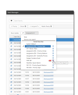


- To pin an existing user-defined, saved search as the default view, make the search your current dashboard view by selecting it from the **Saved Search Options** list. Then click 

(**Pin This Search**).

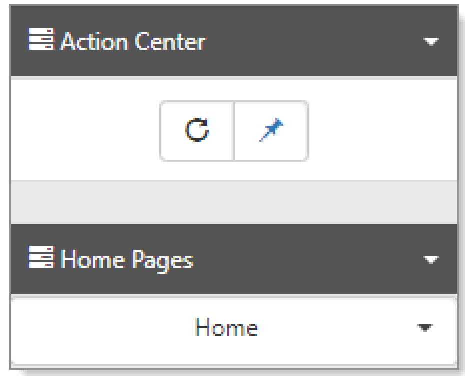
Note: If you have made updates to the pinned search and you want to save them, be certain to also select **Save** or **Save as a new search** from the **Saved Search Options** list.

- To delete a saved search, open the Saved Search Options list, click **Remove This Search**, and select **Yes** on the "Delete Saved Search" confirmation message.



Home Page and Home Page Widgets

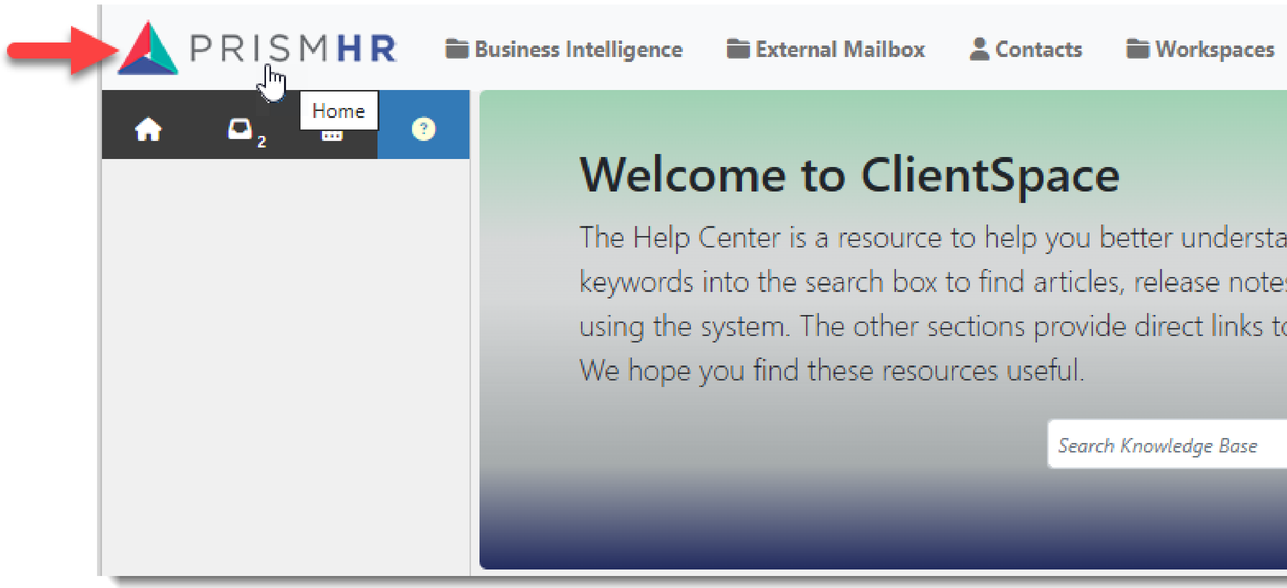
Widgets deliver targeted information within ClientSpace and, therefore, can deliver what is most important to you when you need it. ClientSpace home page widgets can be tailored to your needs, based on the priority, conditions, and security settings of the configured widget. Widget target types determine where the widget layout displays. For your home page, you can select the Home target type, available in the Action Center.



Selecting a Home Page

To select a Home Page:

1. From your home page, in the **Action Center**, expand **Home Pages**.
   All home pages that are available to you display in the list.
2. Select an entry.
   The home page layout changes.
3. To pin the layout as your default, in the **Action Center** toolbar, click (**Current Default Home Page**).
   The pin changes to a green check and then back to the pin icon.
   - When pinned, the home page is the default.
   - You can return to the default home page from anywhere in ClientSpace by clicking:
     - The **Home** icon in the Work Center area.
     - Your company logo (located above the Work Center area.)

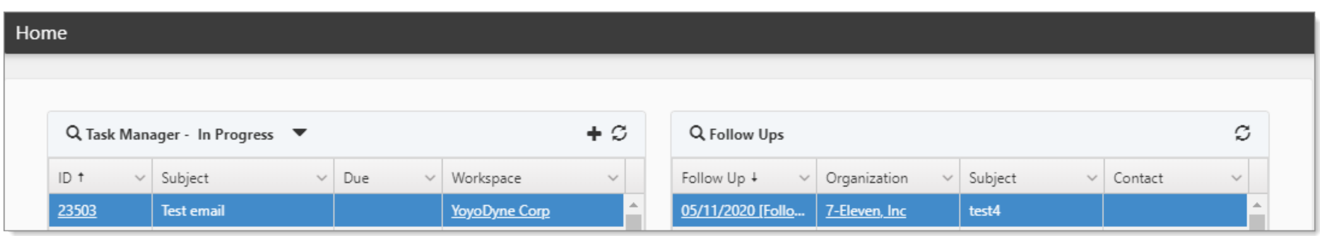


- When no pinned widget is selected, the system defaults the home page based on conditions, with the greatest weighted one as the default.

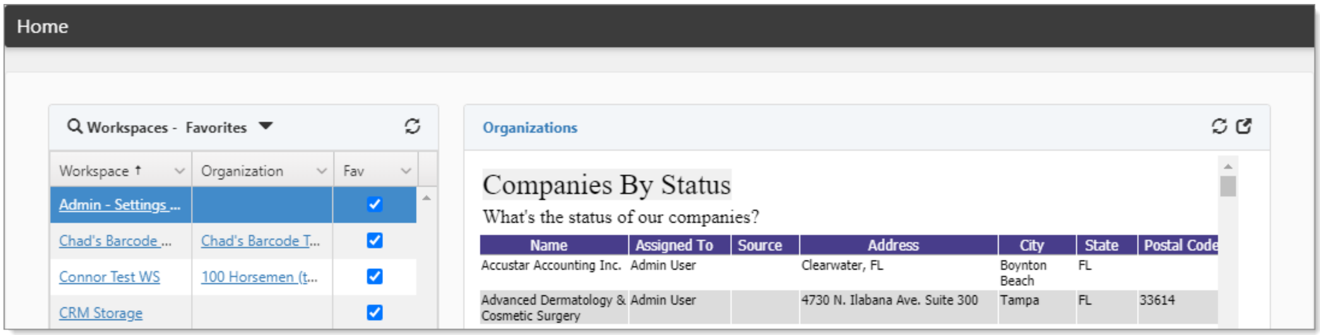
Note that widget configuration has not changed and is administered in System Admin > Widget Layouts. For more details about widgets, conditions, weighting, and security settings, see the *ClientSpace Setup & Administration Guide*.

Examples of Home Page widgets

The following Home Page example was selected from the Action Center > Home Pages. This widget layout presents the Task Manager and Follow Ups widgets.



The following Home Page example was selected from the Action Center > Home Pages. This widget layout presents the Workspaces - Favorites and Organizations with a Business Intelligence report.



Document Previewer

The Document Previewer module allows you to view file attachments across the system without needing to download the document. If you choose to download the document while previewing it, you can.

The Document Previewer can be accessed from four locations:

- Any file attachment field
- The Action Center Attachments panel
- Any Upload File window
- The Document Search module

The Document Previewer supports previewing the following file types: .pdf, .doc, .docx, .xls, .xlsx, .csv, .txt, .png, .jpg, jpeg, and .gif.

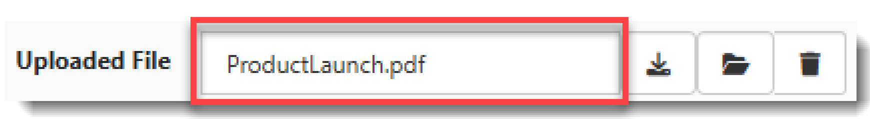
Note: If you attempt to preview an unsupported file, the following message displays:
"This file type is not supported by the previewer. Please download the file to view its contents."
However, you can still use the Download option to download a copy of the file and open it outside of ClientSpace.

Accessing the Document Previewer

File Attachment Field

To access Document Previewer from a file attachment field:

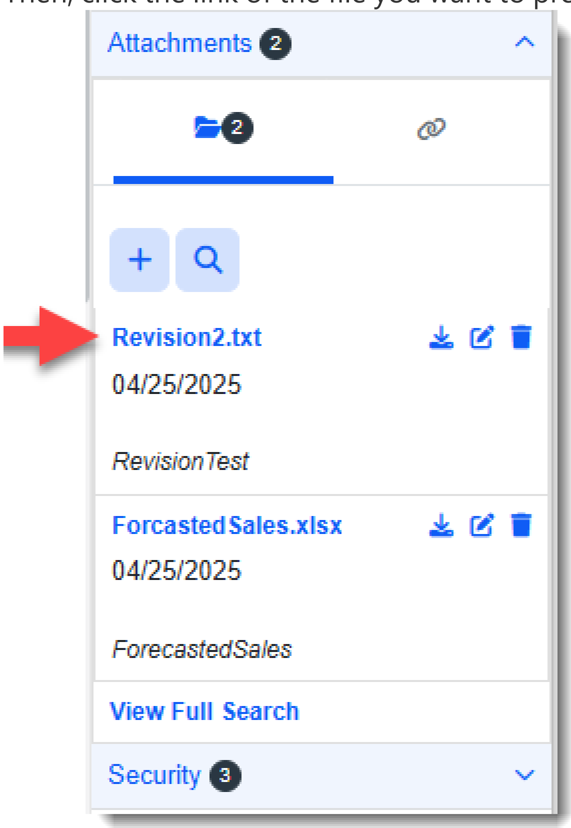
On any file attachment field, click the file name.



Action Center Attachments Panel

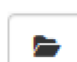
To access Document Previewer from an Action Center Attachments Panel:

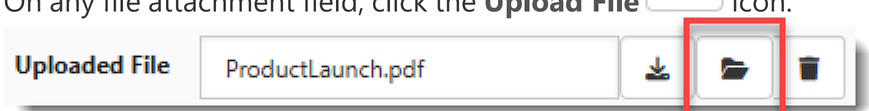
1. On any dataform or CRM form with an attachments panel, in the Action Center, click the down chevron symbol to expand the **Attachments** panel.
2. Then, click the link of the file you want to preview.



Upload File Window

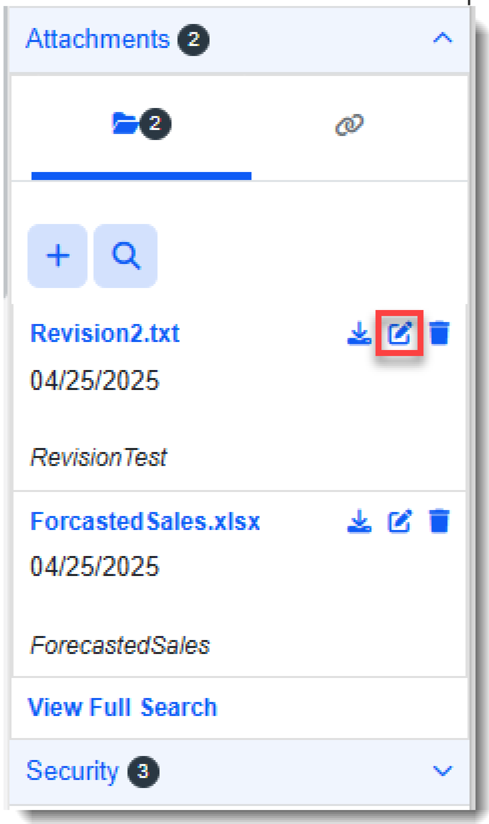
To access Document Previewer from an Upload File window:

1. On any file attachment field, click the **Upload File**  icon.



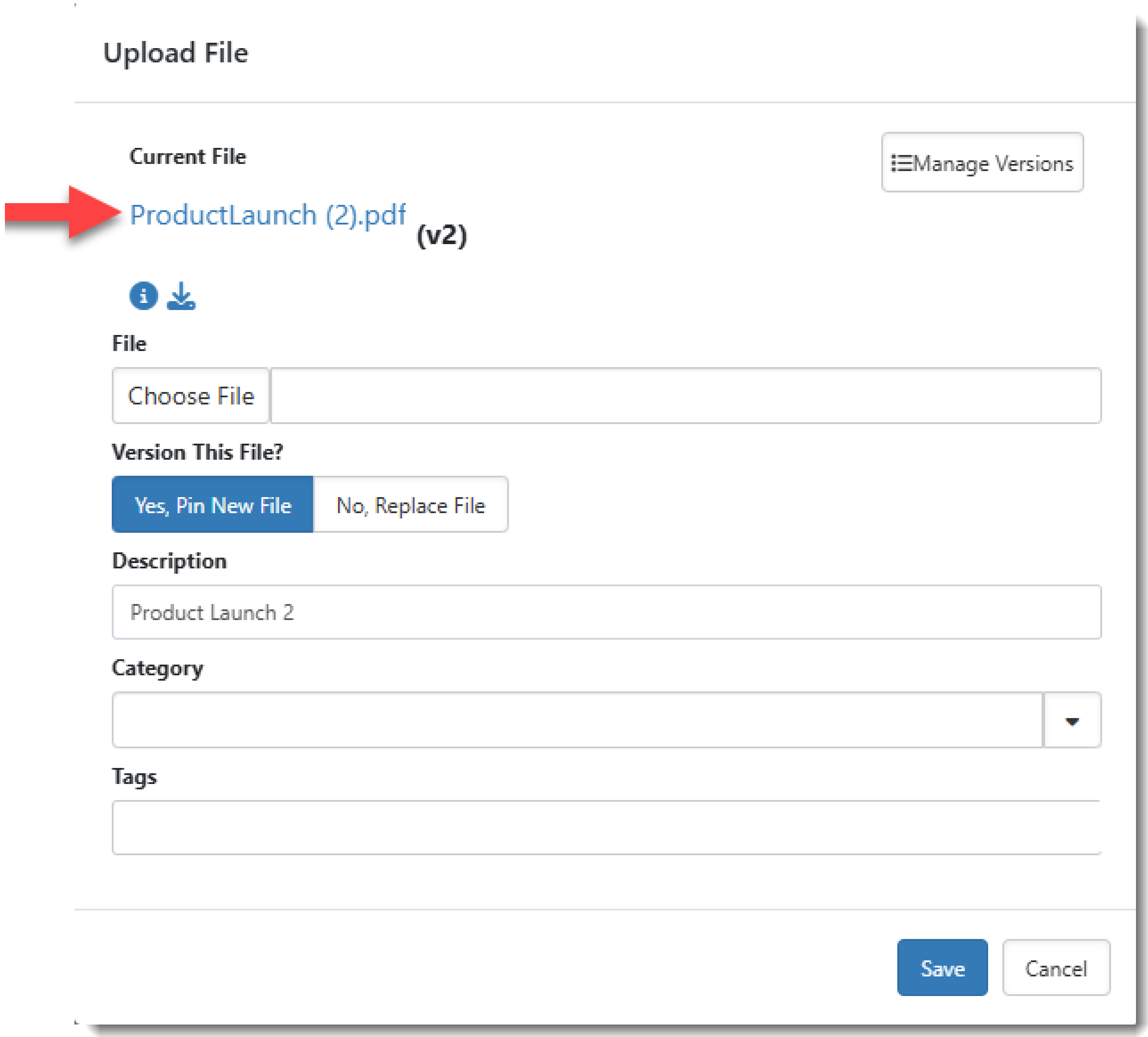
OR

On the Action Center **Attachments** panel, click the **Edit Attachment** icon.

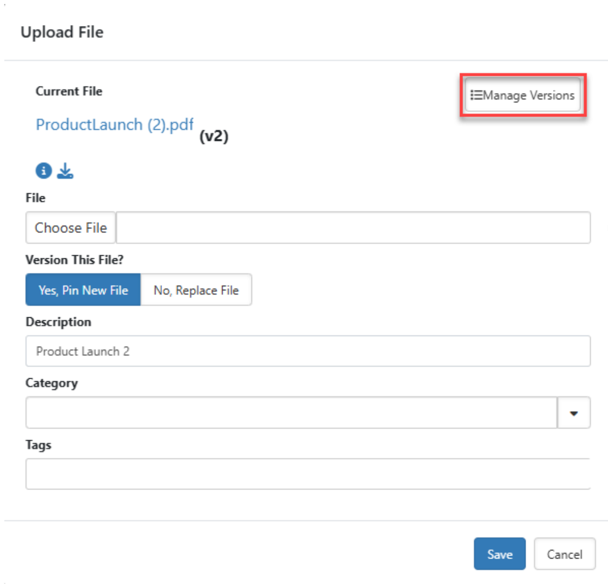


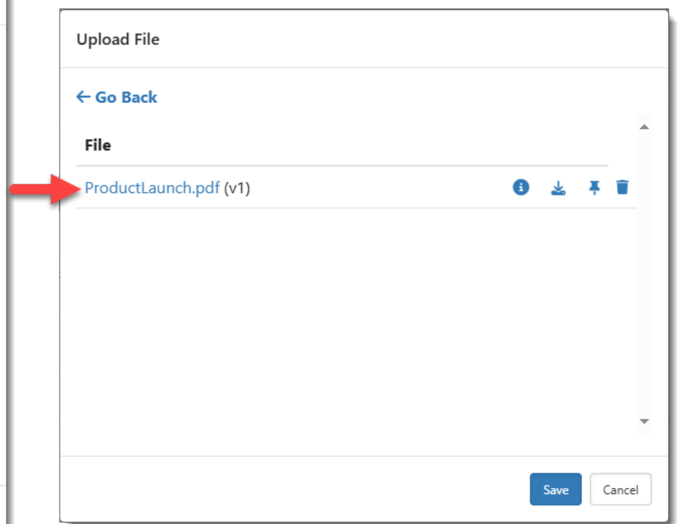
The Upload File window displays.

2. What do you want to do?
    - **To preview the most recently uploaded version of the file:** Click the link under **Current File**.



- **To preview an older version of the file:** Click **Manage Versions** and then when the screen refreshes to display a list of older revisions, click the link of the revision you want to preview.

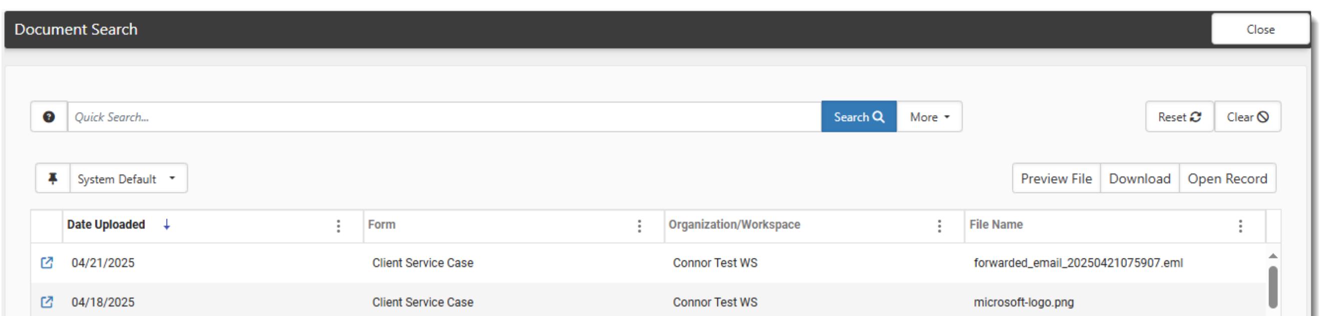




The Document Search Module

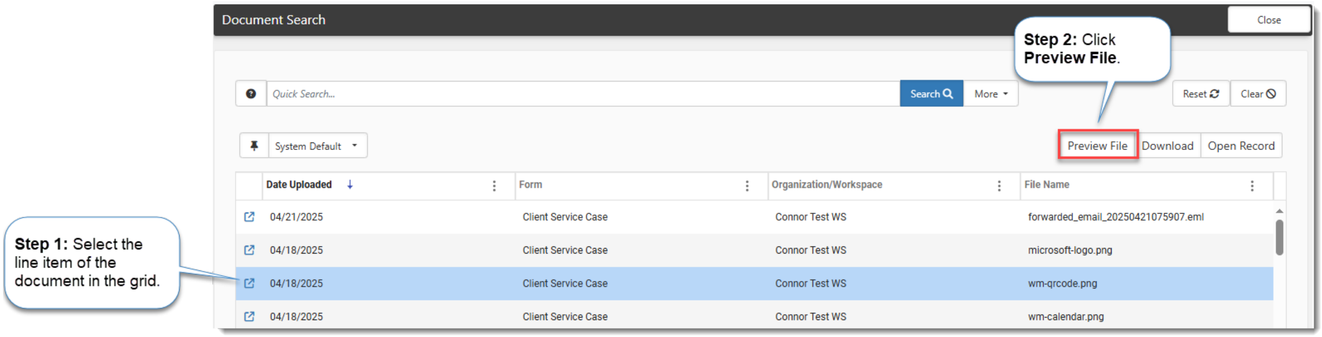
To access the Document Previewer from the Document Search module:

1. From the modules bar, select **Document Search**.
   The Document Search dashboard opens.



Note: You may need to use **More Search** to filter the list. For more details on using the Document Search module, see theDocument Search topic.Document Search

2. With the topic you want to preview selected in the grid, click **Preview File**.

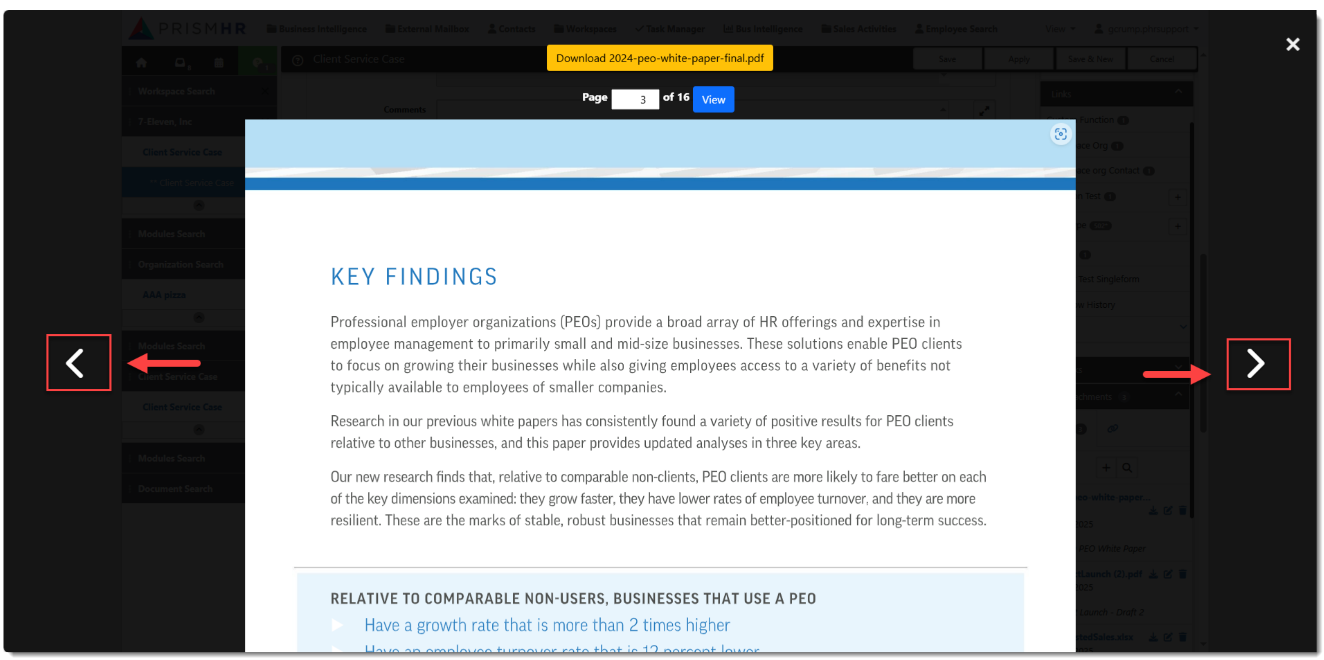


Using the Document PreviewerDocument Search

Once the Document Previewer displays, you can easily navigate the window to view your document and optionally, download the document.

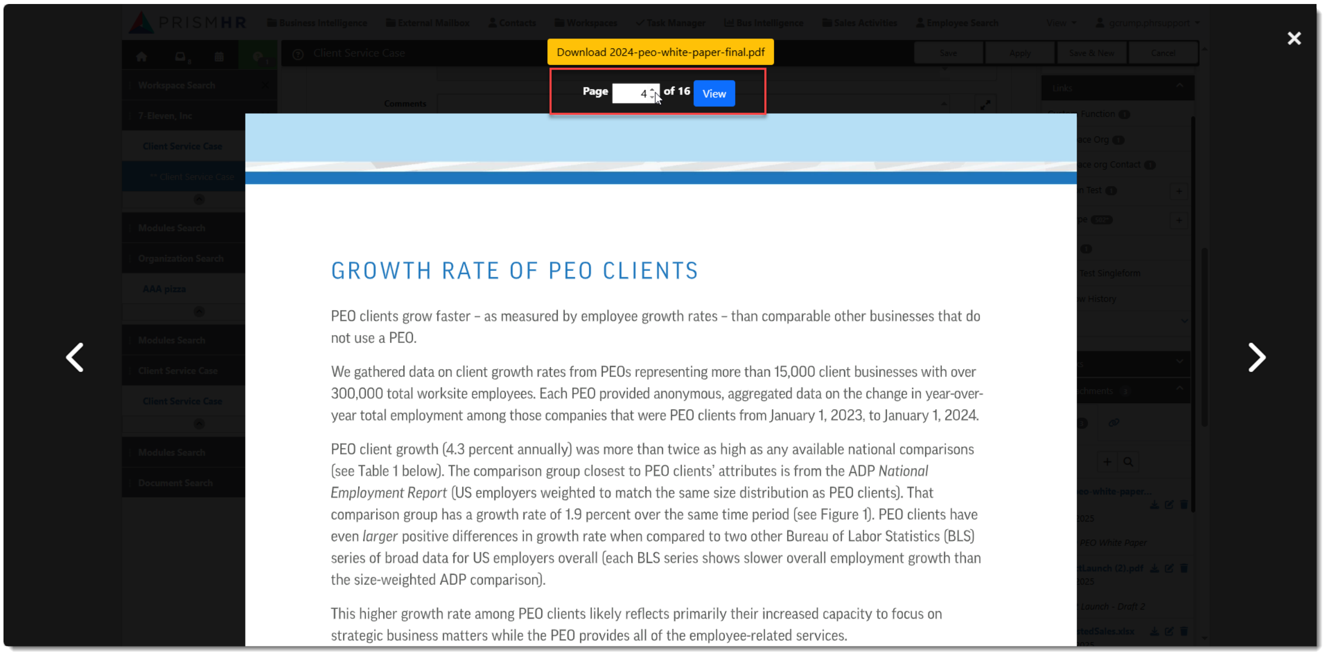
Viewing Pages

Method 1 - Arrows: Use the left and right arrows to navigate from page to page.



Note: On Page 1, there is only a right arrow since you are already at the beginning of the document. Similarly, there is only a left arrow on the last page since there are no additional pages to view.

Method 2 - Page Selector: You can hover over the field to display the up and down arrow keys in the field and click the up or down arrow to set then page number and then click **View**. Alternatively, you can also type a page number in the **Page** field and click **View**.



Downloading

Optionally, click the yellow **Download** button at the top of the screen to download a copy of the file to your PC.

Exiting

Click the **X** in the upper right corner of the screen to close the Document Previewer. You are returned to the currently displayed form in ClientSpace.

Related Topics:

- Document Search

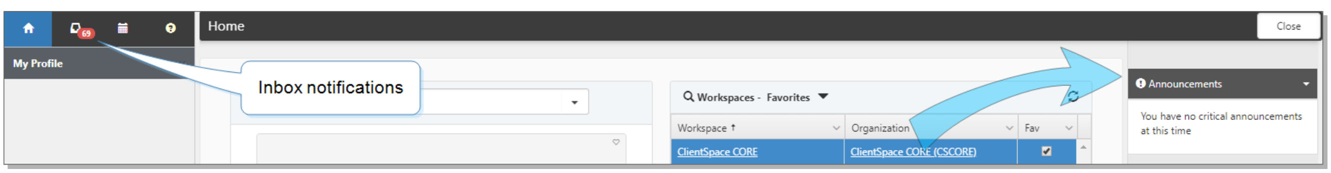
Chapter 4

ClientSpace Notifications

The ClientSpace notifications feature provides up-to-date information about what's going on within your organization. Notifications include items such as cases, tasks, work items, and email. It can be difficult to switch between the various screens, that is where system notifications can help you stay organized. As notifications are posted, you see a visual indicator and a counter badge on the Inbox. Critical notifications are flagged in red.

From the Home page, notifications are displayed in two areas:

- Critical unread notifications appear on the right under Announcements. These messages continue to show as critical until they are dismissed.
- Inbox notifications appear on the left. These are messages that are sent to you as the *To* recipient.



To view Announcements:

When the counter badge is present, you have unread notifications.

1. To view unread messages, on the right, expand **Announcements**.
   The list of messages displays.
2. To open the message, select it. Click **Close** when done.
   The message continues to show as critical until you dismiss it.
3. To dismiss critical messages, click **Dismiss All**. You can also read it through the Inbox, which dismisses critical messages.

To view your Inbox notifications:

The counter on the Inbox icon displays the number of unread messages in which you are in the *To* field.

1. Click (your **Inbox**).
   Notifications display with the list and reading pane.

2. Select an item to read the notification. As you read through the messages, they are marked as **Read**. After you have read through the critical announcements, they no longer display in the Announcements panel (on the right of your screen).

To bulk mark messages as Read:

1. Select the message or messages by selecting ☐.
2. Click ... (**More**), and select an action:
   - **Mark as read**
   - **Mark as unread**
   - **Move selected items to trash**
   - **Move all items to trash**
3. You can also select similar actions in the reading pane.
   As notifications are read, the counter changes to display the count of active unread items.

Preloaded Alerts and Notifications

ClientSpace provides preloaded alerts and notifications through Email Templates and Workflow Channels.

> ClientSpace provides the mechanics. However, the essence of the notifications is client-defined.

Email Templates

The following list presents ClientSpace Email Templates that are provided for you. These email templates require additional configuration to be functional for your organization. To learn more about Email Templates, see the *ClientSpace Setup & Administration Guide*.

Code	Name	Description	Type	Table Name
C19EETermResources	COVID-19 Terminated Employee Resources	List of resources to send to employees terminated due to COVID-19.	Email	gen_ClientServiceCase
C19ManagerInstructions	COVID-19 Manager Termination Instructions	Instructions for client manager when an employee is terminated due to COVID-19.	Email	gen_ClientServiceCase

Code	Name	Description	Type	Table Name
CALEVENT	Calendar Event	Calendar Event Test.	System	not applicable
CaseConfirm	Email to Case Confirmation	Email Reply Template. Confirms that a Client Service Case was created from Email Integration.	System	not applicable
CaseExternalNotify	External Case Notification	CSC External	Email	gen_ClientServiceCase
CaseInternalNotify	Internal Case Notification (Non-Critical)	CSC Internal	Email	gen_ClientServiceCase
CaseInternalNotifyCritical	Internal Case Notification (Critical)	Critical case change notification sent to Internal users.	Email	gen_ClientServiceCase
CRMNOTE	CRM Note	CRM Note	System	not applicable
CSCDISC	Client Service Case Discussion	Client Service Case Discussion wrapper for outgoing discussion. Sent to external recipient.	System	not applicable
CSCDISCEMINT	Case to Email Reply	Message to external users when a discussion response has been posted to the thread. (EmailInttoCaseDisc).	System	not applicable

Code	Name	Description	Type	Table Name
CSCDISCNEW	CSC Discussion New Reply Notification	When external recipient sends message, this will be sent only to the AssignedTo user of the case.	System	not applicable
CSCESC	Client Service Case Escalation	Email Template used when a Case is escalated.	System	not applicable
CSCRPLYMergeFields	Reply Template 1	List of Merge Fields	System	not applicable
EETerm	Employee Termination	Communicate an employee termination.	Email	gen_ EmployeeEmploymentInformation
EmployeeStateTaxChange	Employee State Tax Change	Sends a notification when there has been an Employee State Tax change	Email	PrismHR Event
EmployeeFederalTaxChange	Employee Federal Tax Change	Sends a notification when there has been an Employee Federal Tax change	Email	PrismHR Event
INCIDENT	Incident System Template	Incident System Template	System	not applicable
PHRAutoImportOngoing	PrismHR Auto Import Ongoing	PrismHR Auto Import Notification - Ongoing Enabled	Email	gen_ PrismHRImportAutomation
PHRAutoImportUser	PrismHR Auto Import Users	PrismHR Auto Import Notification - Completed	Email	gen_ PrismHRImportAutomation

Code	Name	Description	Type	Table Name
PHRDDNotice	Direct Deposit Activity Notice	Employee Direct Deposit Notification	Email	gen_PrismHREvent
PHREmployeeAddressChange	PHR: Employee Address Change	Employee Address Change Notification from PrismHR.	Email	gen_Employees
PHREmployeeSSNChange	PHR: Employee SSN Change	Employee SSN Change Notification from PrismHR	Email	gen_Employees
PHREmployeeStatusChange	PHR: Employee Status Change	Employee Status Change Notification from PrismHR	Email	gen_ EmployeeEmploymentInformation
PHREmploymentTypeChange	PHR: Employment Type Change	Employment Type Change Notification from PrismHR	Email	gen_ EmployeeEmploymentInformation
PHRPayRateChange	PHR: Pay Rate Change	Pay Rate Change Notification from PrismHR	Email	gen_ EmployeeEmploymentInformation
SalesUWReviewReady	Deal Ready for Underwriting	Send an notification when a deal is ready for underwriting and review.	Email	gen_ClientMaster
SubscribeCase	Notification to Case Subscriber	This notice goes to users who are subscribed to a case and notifications were not suppressed.	Email	gen_ClientServiceCase

Code	Name	Description	Type	Table Name
SYS_CSPWD	ClientSpace Authentication Password Reset	Password reset, Auth Type = ClientSpace	System	not applicable
SYS_CSNEWUSER	New User Account Authentication	Sent to new User email address upon account creation. Available replace fields: {UserName} (Users.FirstName <space> Users.LastName) {LoginId} (Users.LoginID) {Company} (Users.Company) {AppUrl} (Url of the current site) {CreateDate} (Now, short date) {CreatedBy} (Users.CreatedByLogin) {luAuthenticationType} (Users.luAuthenticationType) {ProjectName} (ProjectName, if User is a ProjectUser) ** {InstallText} (?) {MailGUID} (Users.MailGUID) {AppName} - If not a ProjectUser, this field	System	not applicable

Code	Name	Description	Type	Table Name
SYS_CSUSER	ClientSpace Authentication Username forgotten	Username forgotten, Auth Type = ClientSpace	System	not applicable
SYS_DAPWD	Domain Authentication Password Reset	Password reset, Auth Type = Domain	System	not applicable
SYS_DAUSER	Domain Authentication UserName forgotten	Username forgotten, Auth Type = Domain	System	not applicable
TFA	TFA Notification	TFA Notification	System	not applicable

Workflow Channels

The following workflows are provided for you. These workflow require additional configuration to be functional for your organization.

Channel Name	Dataform	Owner	Description
COVID-19 Termination	gen_ClientServiceCase	User, Developer	Trigger a workflow that spawns tasks: • Terminate in payroll • Coordinate final check • Send offboarding paperwork • Schedule exit interview • Complete exit interview • Send benefits continuation details • Notify carriers of employee termination • Restrict or disable login access • Send state specific unemployment information • Coordinate severance details • Confirm receipt of signed severance agreement

Channel Name	Dataform	Owner	Description
			• Confirm severance agreement is not revoked • Disburse severance package • Severance agreement denied or revoked
Employee Last Name Change	gen_Employees	User, Developer	Trigger a task when an Employee changes their last name.
Employee State Change	gen_Employees	User, Developer	Trigger a task when an Employee moves to another state.
Employee Termination	gen_ EmployeeEmploymentInformation	User, Developer	Trigger a task when an Employee is terminated.
New Client Implementation	gen_ClientMaster	User, Developer	Trigger a workflow that spawns tasks for prep, implementation kickoff, systems setup, employee onboarding, benefits enrollment, payroll, and client transition.
New Hire	gen_Employees	User, Developer	Trigger a workflow that spawns tasks for background check and benefit setup.

Channel Name	Dataform	Owner	Description
PHR: Employee Address Change	gen_Employees	User, Developer	Trigger a task when a PrismHR Employee's address changes.
PHR: Employee Pay Rate Change	gen_ EmployeeEmploymentInformation	User, Developer	Trigger a task when a PrismHR Employee's pay rate changes.
PHR: Employee SSN Change	gen_Employees	User, Developer	Trigger a task when a PrismHR Employee's SSN changes.
PHR: Employee Status Change	gen_ EmployeeEmploymentInformation	User, Developer	Trigger a task when a PrismHR Employee's status changes.
PHR: Employment Type Change	gen_ EmployeeEmploymentInformation	User, Developer	Trigger a task when a PrismHR Employee's employment type changes.
Underwriting Approve/Decline	gen_ClientMaster	User, Developer	Trigger a task to indicate that underwriting has started for a specific Status and Department.

Employee related alerts

ClientSpace provides configured alerts when the specific Employee data is changed. These alerts are configured for you as Email Templates and are available in the application. The templates have a Template Code that begins with PHR. If you are not using them, look for them in the unpublished Email Templates list.

Review the list and customize these alerts as required. You can personalize the body of the message or add more recipients. System Admins should review these templates before activating them. More employee related alerts are possible – these are just what ClientSpace provides for you.

When this changes	An alert is generated
Direct Deposit account or transit number	When a worksite employee’s direct deposit account number or transit number is added or changed, a notification is sent to the employee. If the employee did not add, edit, or authorize a change to their direct deposit information, the employee can contact their service provider. You can configure Direct Deposit notifications to generate customized direct deposit email notifications. The notification helps worksite employees and service providers to be more proactive in detecting and preventing fraud attempts. See the topic *Configuring a direct deposit notification in ClientSpace* in the Setup & Administration Guide.
Employee Address	When the Employee Address changes, an alert is issued to the affected employee.
Employee Status	When the Employee Status changes, an alert is issued to the affected employee.
Employee Type	When the Employee Type changes, an alert is issued to the affected employee.
Employee Social Security Number	When the Employee Social Security Number changes, an alert is issued to the affected employee.
Employee pay rate	When the Employee pay rate changes, an alert is issued to the affected employee.
Employee work or personal email	When the Employee work or personal email address changes, an alert is issued to the affected employee.

Broadcasting notifications

ClientSpace provides a dashboard module named **Announcements** that allows you to broadcast announcements to all members of a security role. This is great for notifying a large group of ClientSpace users all at once. We recommend that you secure the Announcements module.

To secure the Announcements module:

1. Go to **System Admin** > **Modules**.
   The Modules dashboard opens.
2. Select the **Announcements** module and click **Edit**.

The Module Details form opens.

3. In the **Action Center**, click **Roles**.
   The Module Roles dashboard opens.
4. Click **Add** and select the roles to which you would like to give broadcast capabilities.
   This allows you to secure the module so that only specific users can perform broadcast notifications.
5. Click **Ok**.

Creating new announcements

Want to remind the Sales staff to turn in their progress reports before the weekend? Want to give everyone in Finance a heads up about a late paying client? Want to tell the entire company about a change of venues for the company picnic this weekend? Use the Announcements module to broadcast notifications.

To create a new announcement:

1. From the top banner, click the **Announcements** module. You may need to find it in the **View** list.
   The Broadcast Notifications dashboard opens. From here you can search for previous announcements and add a new one. You can create notifications that can be broadcast to a large audience, simply by selecting the appropriate role.
2. To create a new announcement, click **Add**.
   The Broadcast Notification form opens.

3. Enter a **Subject** and **Message**.
4. Select the announcement **Priority**:

Low, Medium, and High	Low, Medium, and High priority announcements are received through the normal notification process in ClientSpace. (Broadcast announcements, however, are RED to indicate they are different from standard announcements.)
Critical	Critical announcements present in the notifications inbox in the same manner as other broadcast announcements, but continues to be displayed in the upper right actions pane until dismissed.

5. To select the user roles to which you want to send the announcement, expand **Security** and click **Select Roles**.
   The Role Search dashboard opens.
6. Select the roles and click the **Select** option. Then click **Ok**.
   You are returned to the Broadcast Notification form
7. Click **Save**.

Managing Inbox notifications

All throughout the day when using ClientSpace you get notifications. Task items you need to attend to, Cases that have been updated – they all vie for your attention. But if you have to jump out to email to read them, it slows you down. To streamline this process, we included the notification center in ClientSpace. This allows you to keep up to date on those important ClientSpace notifications without the distraction of jumping over to email. This topic provides an overview of managing your notifications in ClientSpace.

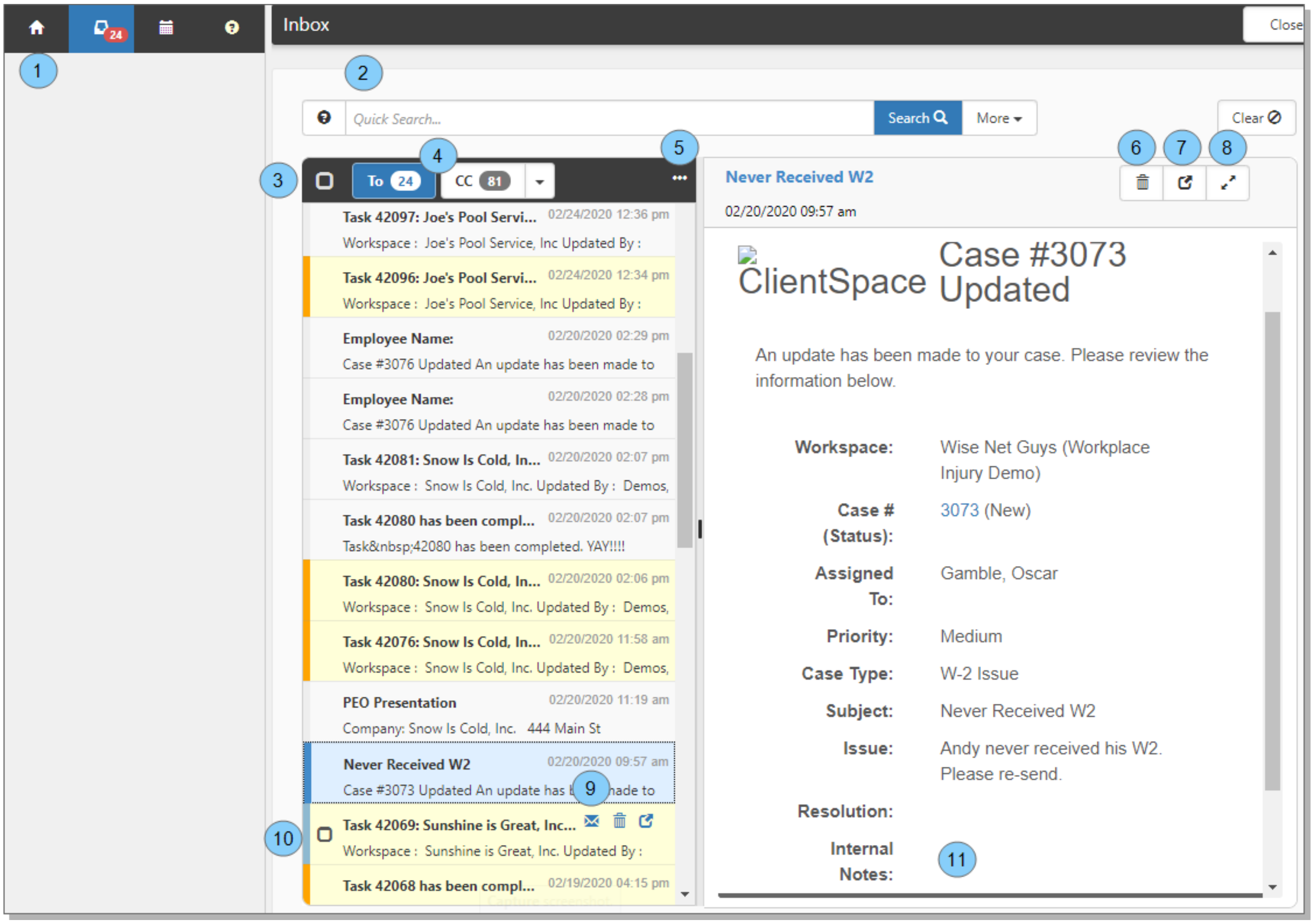
Due to the volume of notifications that could be generated to the logged in user just by using ClientSpace, we have limited the number of actions that create Self notifications – these are notifications to the user that triggered the notification occurrence. The actions that trigger self notifications include:

- **Calendar**: Calendar events you create, notify you, allowing you to add them to your mail service calendar.
- **User**: User events, such as new accounts, or your password expiring/being changed notifies you.
- **Marketing campaigns**: Automatically sent notifications from Marketing campaigns created by you also notify you.

When you first receive a notification alert, it displays as a transparent bubble message in the work items area. These alerts are designed to provide a brief introduction to the notification, allowing you to decide whether it needs to be addressed immediately. Reading these items, marks them as read, removing them from the Quick View and incrementing the Quick View counter down by one.

Inbox

For those of us who get more than a few notifications a day, the Inbox is a better way to manage them as it provides more detailed information at a glance, as well as a way to mass update the list.



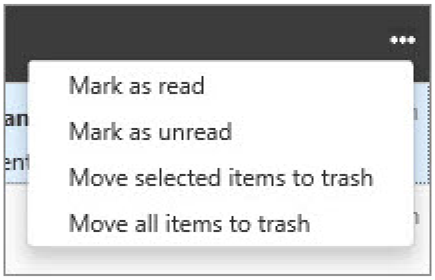
The numbered items in the image correspond to the numbered items in the following list.

1. Inbox Work Item	Click here to open your Inbox.
2. Inbox Quick Search	Source, Unread, or Read and a Keyword search.
3. Select All	Allows you to select all visible records, used in conjunction with the Actions ellipsis.
4. Receipt Type	Receipt type provides insight into your involvement with the notification, separating notifications on which you were primary (in the To field) from notifications where you were included (in the CC field) and providing a badge counter of the number of unread for each. The CC area includes additional options using the arrow to display all notifications and to display Trash items (more on this below).
5. Options	Used to perform mass update actions on the selected record(s). See more

	below.
6. Delete	In the Notification detail pane. This icon allows you to delete the selected notification entirely.
7. Jump To	In the Notification detail pane. This icon allows you to jump directly to the select notifications triggering object (case, task).
8. Expand	In the Notification detail pane. This icon allows you to Expand the notification, providing a full-page view.
9. Notification Actions	These icons allow you to Mark as Unread, Move to Trash, or Open the related record. Actions are for the selected email.
10. Inbox	This is the collection of all your read and unread messages. • Use the check box (to the left) to select multiple items, which may then be managed from the right-hand detail pane or using the Mass Actions ellipsis. • Status Color: The band of color on the left of the notification, along with the color of the item in the Inbox provides insight into the state of the notification: ◦ Yellow: Unread notification, not selected. ◦ Blue: Currently selected notification. Moving off this notification marks it as read. ◦ White: Read notification.
11. Notification Detail	Provides a detailed view of the notification. This pane can also be used to manage multiple notifications at once by selecting several items using the notification option.

Inbox Mass Actions

As previously mentioned, you can select either all the visible records using the Select All option, or a set of records using the email option to create a selection of records, which may then be mass updated using the Mass Actions ellipsis (...).



- **Mark as read**: Marks all selected items as Read, subtracting the items from the counter badge.
- **Mark as unread**: Marks all selected items as unread - adding the items to the counter badge
- **Move selected items to trash**: Just like it sounds - does not permanently delete items, but removes them from the inbox
- **Move all items to trash**: self-explanatory

Taking out the trash!

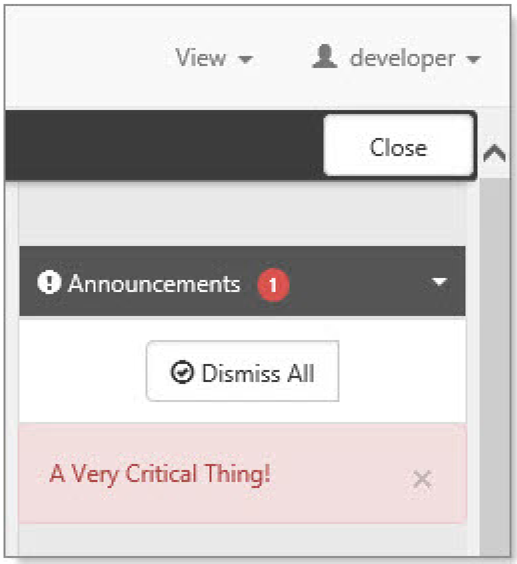
- To manage your trash items, use the options list on the CC receipt type to select **Trash**.
- You can manage Trash items with a special set of Mass Update actions specific to Trash.

Critical Notifications

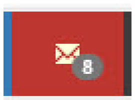
- To learn how to create and manage Critical notifications in ClientSpace, see Broadcasting notifications.

Announcements differ from standard notifications in a few key ways. When presented, an announcement alert displays in red.

- Further, a Critical priority announcement also displays at the top of the right-hand Action pane until dismissed, ensuring that it cannot be overlooked:



- Finally, when your Inbox contains a broadcast announcement, the Inbox icon displays in red until the item is marked as Read.



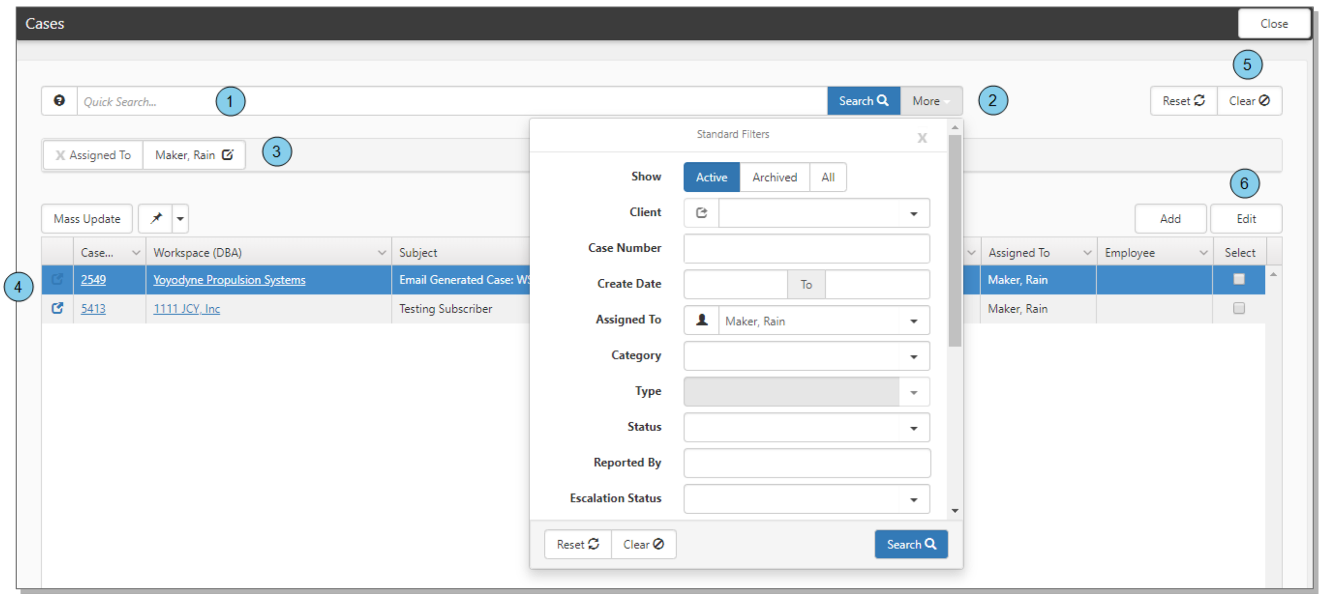
Learning how: Client Alerts

Video

View the video Client Alerts.

Chapter 5
Searching in ClientSpace

All search pages in ClientSpace are arranged in a similar fashion. The following Case search example represents search options. Individual Quick Search and More search options can vary.



The numbered items in the example correspond to the following list:

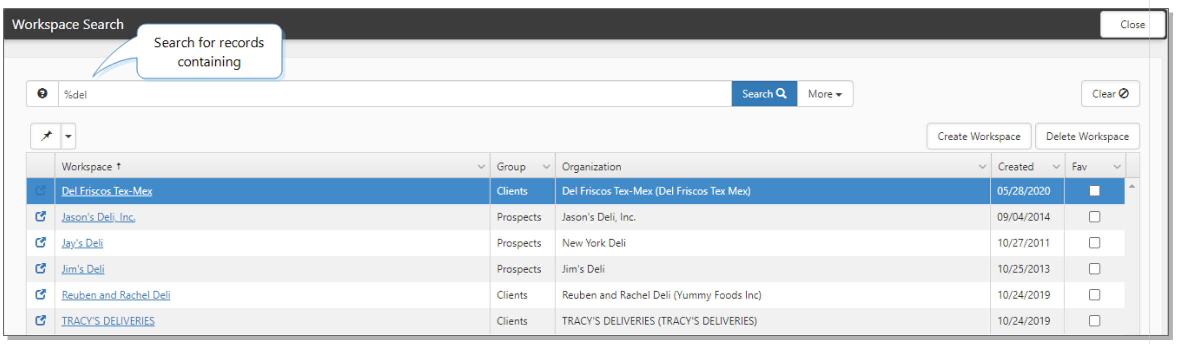
1. **Quick Search**: Quickly search a few of the most commonly searched fields.
2. **More**: Detailed search can include the same fields as Quick search, but More searches are always *equals* searches.
3. **Filter chiclets**: Chiclets represent the currently selected filters.
4. **Search results**: Filtered records list.
5. **Clear search filters**: Clears all search filters.
6. **Edit record**: Select a record in the search results and click **Edit** to open the record.

Quick Search

The Quick Search bar provides an easy way to search for records quickly.

To use Quick Search:

1. When you type an ID or word:

term or phrase	Must equal the search string entered. For example, searching for **23564** finds the case where case number = 23564.
starts with	Must begin with the search string entered. For example, searching for **Client** finds cases with a category of *Client Alert* and *Client Contact* but **not** *Payroll Client*.
%	Use the **%** symbol to search fields for records containing the search string that follows the symbol. For example, searching for **%del**finds entries with **del** anywhere in the grid fields. The following example shows Del Friscos Tex-Mex, Jason's Deli, Inc., Jay's Deli, Jim's Deli, Reuben and Rachel Deli, and Tracy's Deliveries. 

2. Press **Enter**.

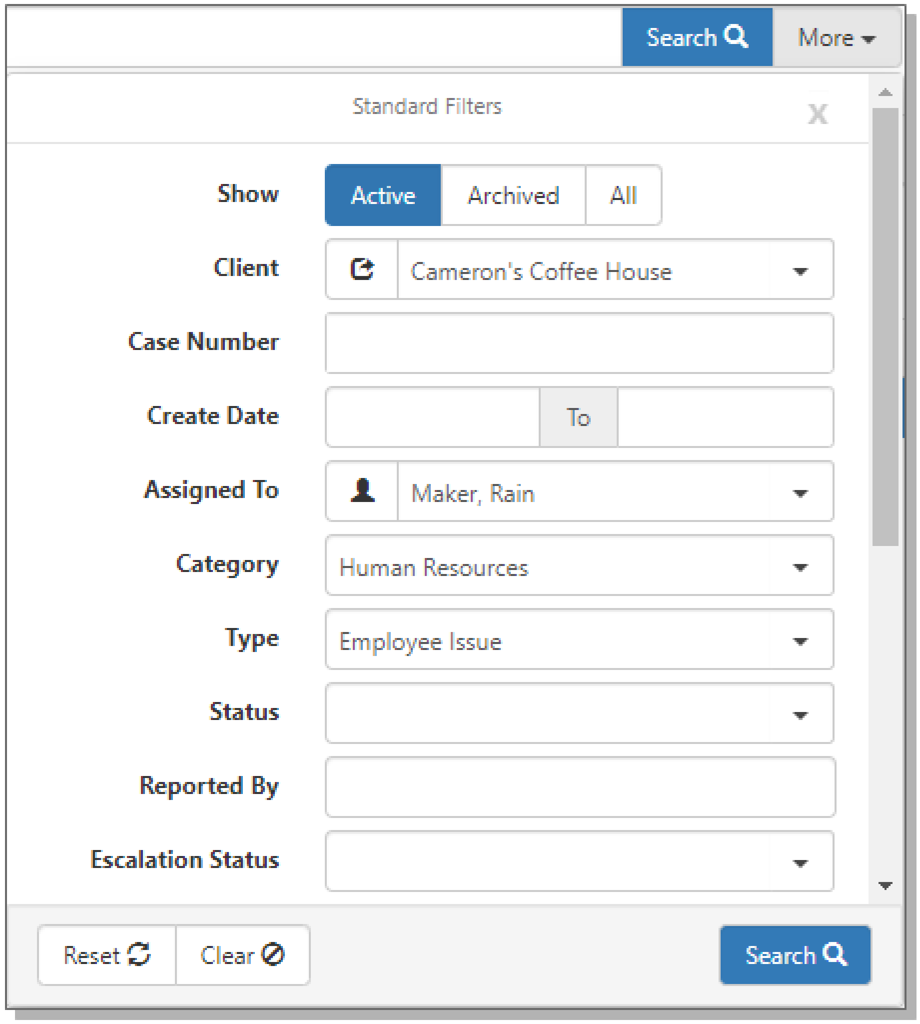
Results render active and inactive records when searching for specific IDs for the following modules:

- Cases (Case number)
- Tasks (Task ID)
- WC Policies (Policy Number)
- WC Claims (Carrier Claim Number, CS Claim Number)
- EPLI Claims (Carrier Claim Number)
- Unemployment Claims (Docket Number)

Note: Overlaps can occur when using Quick Search. Looking for **%Loss Run** can return cases where the category is *Loss Run Request* because the Starts With search overlaps the **%** search.

More Search

If Quick Search does not return the results you need, you can add additional search parameters under the More Search area. More uses filters for locating specific data by Client, Case Number, Date, Category, and so on.



Search uses **dtSearch**, a retrieval / full-text search engine to search large numbers of system records efficiently, returning the results quickly. Use this powerful search mechanism through More Search.

More Search provides:

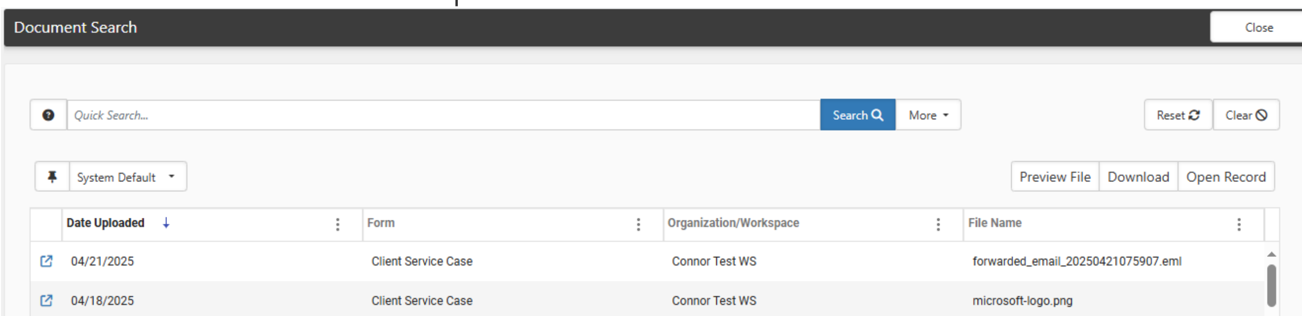
- Field specific searches
- Creates filter chiclets that display your current search parameters
- Filters are additive. For example, you can search for cases that are both *Client Relations* category and *In Progress* status.
- The **Show** filter is common across all searches. You can filter for Active records, Archived records (inactive), and All records (both).

Document Search

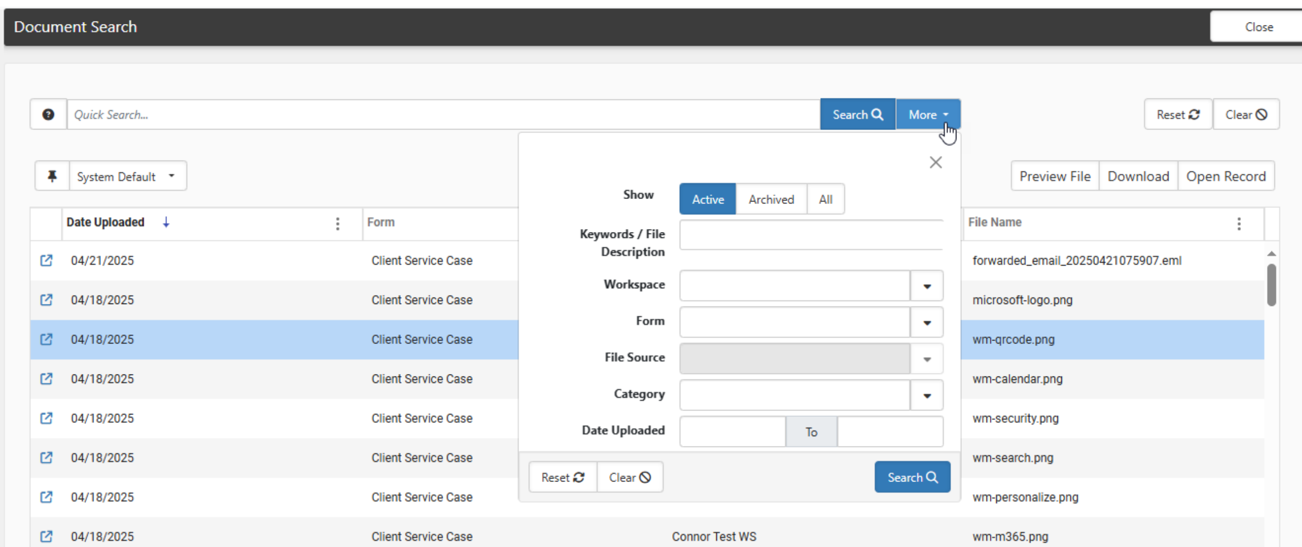
The Document Search module allows you to find documents across the system using filtered searches. This module uses **dtSearch**, a retrieval, and full-text search engine to search large numbers of system records efficiently, returning the results quickly.

To use Document Search:

1. From the modules bar, select **Document Search**.
   The Document Search dashboard opens.



2. Use **More Search** to filter the list.



Parameter	What it does
Show	Options, Active. Inactive, or All. This refers to the record IsActive flag

Parameter	What it does
Keywords / File Description	Searches File description for matching text using a LIKE search. Searches in these areas: • File Category • File Name • File Category • File Metatags • Organization Name • Workspace Name • Entity Type (Dataform Name or Task or Organization or Contact or Activity • Default Attribute for Entity Type (such as Case # or Task #) • Fields with the **Include in Document Index** box checked. Searches actual DB Values, not decoded.
Workspace	Filters for selected Workspace
Form	Select a dataform or an Organization, Contact, Activity, Task
File Source	Enabled when a dataform is selected. Choose the paperclip or an upload field on that dataform
Category	Filters for files of the selected Category.
Date Uploaded	Filters for documents uploaded between the selected dates.

Security

Document search provides access to workspace documents where the logged in user is in the Workspace Users list. Documents in Workspaces to which the user does not have access are not displayed.

Buttons

To use the buttons at the top of Document Search, click a file in the grid and then click the desired button.

Preview File	Preview the file in the Document Previewer. See the Document Previewer topic for additional details.Document Previewer

Download	Download a copy of the file.
Open Record	Opens the record containing the file. **Note:** Double-clicking the row in the grid does the same.

Category management

Populate the name of the dataform on the Filter Value for the Lookup and that category would be limited to just that dataform. Leaving the filter value blank would allow the category to be available from all forms.

Scheduled processes

Document Index - Rebuild	Deletes and re-creates the indexes on the following tables: Orgs, Contacts, Tasks, Org Activities and Dataforms (file upload fields and paperclips). Optimizes file searches.
Document Index - Update	Updates the indexes on the following tables: Orgs, Contacts, Tasks, Org Activities and Dataforms (file upload fields and paperclips). Optimizes file searches.

These processes make attached files easier to find in the system by either refreshing or removing and re-creating the indexes that point to those files. These indexes are rebuilt/refreshed for:

- Files attached to dataform paperclips (Core and PEO dataforms)
- Files attached to dataform fields (Core and PEO dataforms)
- Files attached to Organizations
- Files attached to Contacts
- Files attached to Tasks
- Files attached to Activities

Indexes generally contain the items of data on the file that we use to link to or search for the file - like an index in a book so that the searches are optimized.

dtSearch keyword search help

Using a ***** search option is more forgiving and can yield better search results. The ***** is used to match any number of characters. It is similar to the **%** (contains) search option. A **%** search with dtSearch performs differently, ignoring any records where the string before the wildcard does not stand alone:

Search String	Returned Results
Business%	Business File For Test.doc
Business*	Business File For Test.doc, BusinessRuleError.jpg

Keyword search is any sequence of text, like a sentence or a question.

In keyword searches:

- Use quotation marks around phrases.
- Use **+** in front of any word or phrase that is required.
- Use **–** in front of a word or phrase to exclude it.

  Examples:

  - banana pear "apple pie"
  - "apple pie" –salad +"ice cream"

A Boolean search request consists of a group of words or phrases linked by connectors such as **and** and **or** that indicate the relationship between them.

Examples:

- **apple and pear** - Both words must be present
- **apple or pear** - Either word can be present
- **apple and not pear** - Only *apple* must be present

If you use more than one connector, use parentheses to indicate precisely what you want to search for. For example, *apple and pear or orange juice* could mean *(apple and pear) or orange*, or it could mean *apple and (pear or orange)*.

Use	Example
Use a **?** to match any single character.	**appl?** matches **apply** or **apple**
Use a ***** to match any number of characters.	**appl*** matches **application**
Use a **~** to extend a search to cover grammatical variations on a word.	**apply~** matches **apply**, **applies**, **applied**
Use a **%** to find a word even if it is misspelled.	**ba%nana** matches **banana**, **bananna**
Use **#** to look for a word that sounds like the word you are searching for and begins with the same letter.	**#smith** matches **smith**, **smythe**

Use	Example
Use **&** to find synonyms of a word in a search request.	**fast&** matches **quick**
Use the **AND** connector in a search request to connect two expressions, both of which must be found in any document retrieved.	**apple pie and poached pear** would retrieve any document that contained both phrases
Use the **OR** connector in a search request to connect two expressions, at least one of which must be found in any document retrieved.	**apple pie or poached pear** would retrieve any document that contained apple pie, poached pear, or both
Use **NOT** in front of any search expression to reverse its meaning. This allows you to exclude documents from a search.	**apple sauce and not pear**

Learning how: Searching in ClientSpace

Video

View the video Searching in ClientSpace.

Chapter 6

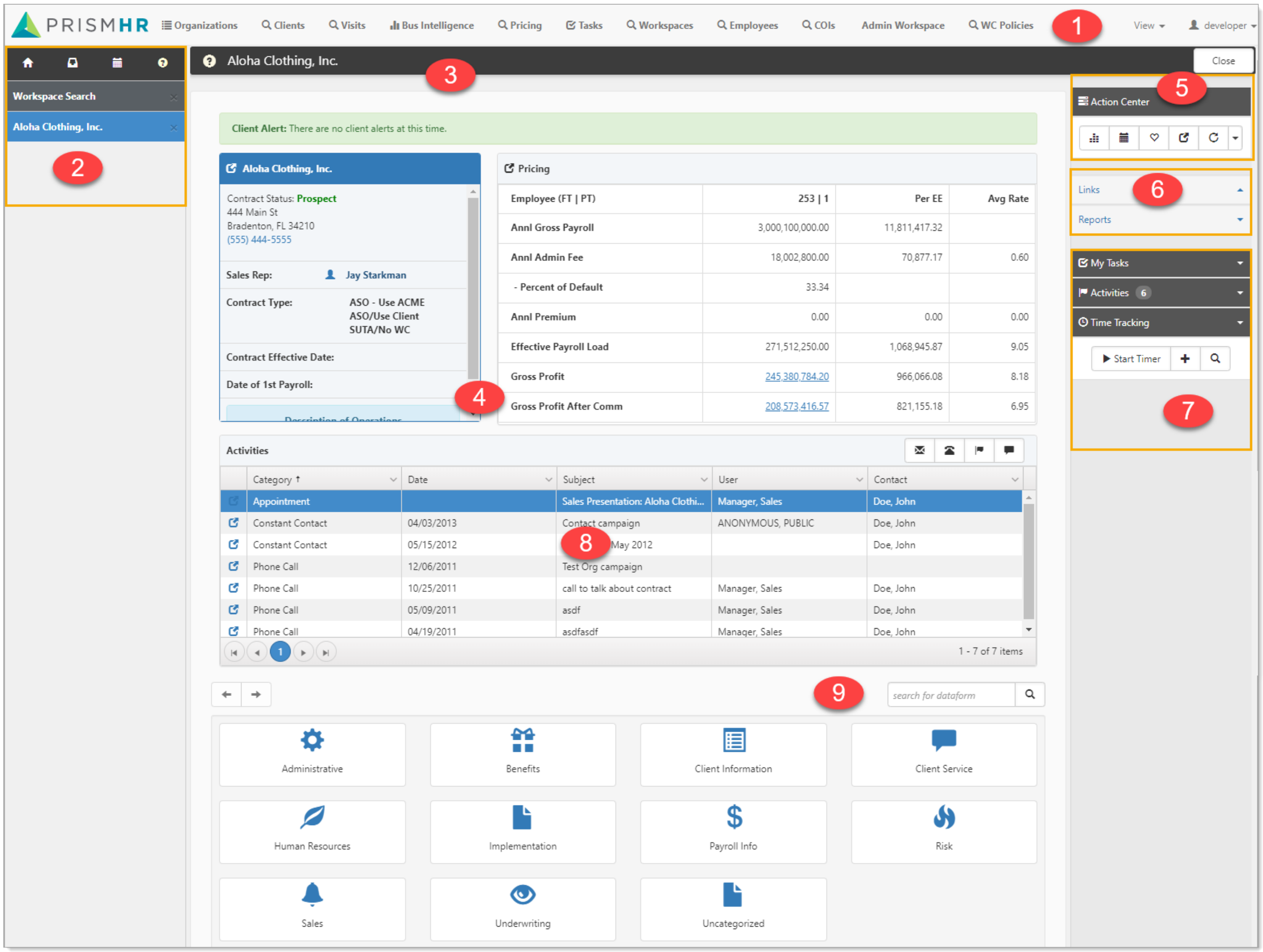
The Workspace Landing Page

Workspace: A Workspace is a set of dataforms for collecting and storing information, generally about a specific client or business. Workspace dataforms are related to a specific project and share a common foreign key. Workspaces are often created by cloning a Template Workspace, enabling a consistent look and feel, as well as a consistent set of dataforms. You can also create a workspace (see Creating a Workspace).

Workspace landing page: The Workspace landing page acts in many ways as the container for the Client. From the Workspace landing page, you can quickly access client information. The dynamic nature of the Workspace landing page is shown in the following images. Depending on the status of the client workspace (prospect or client), a different landing page is displayed.

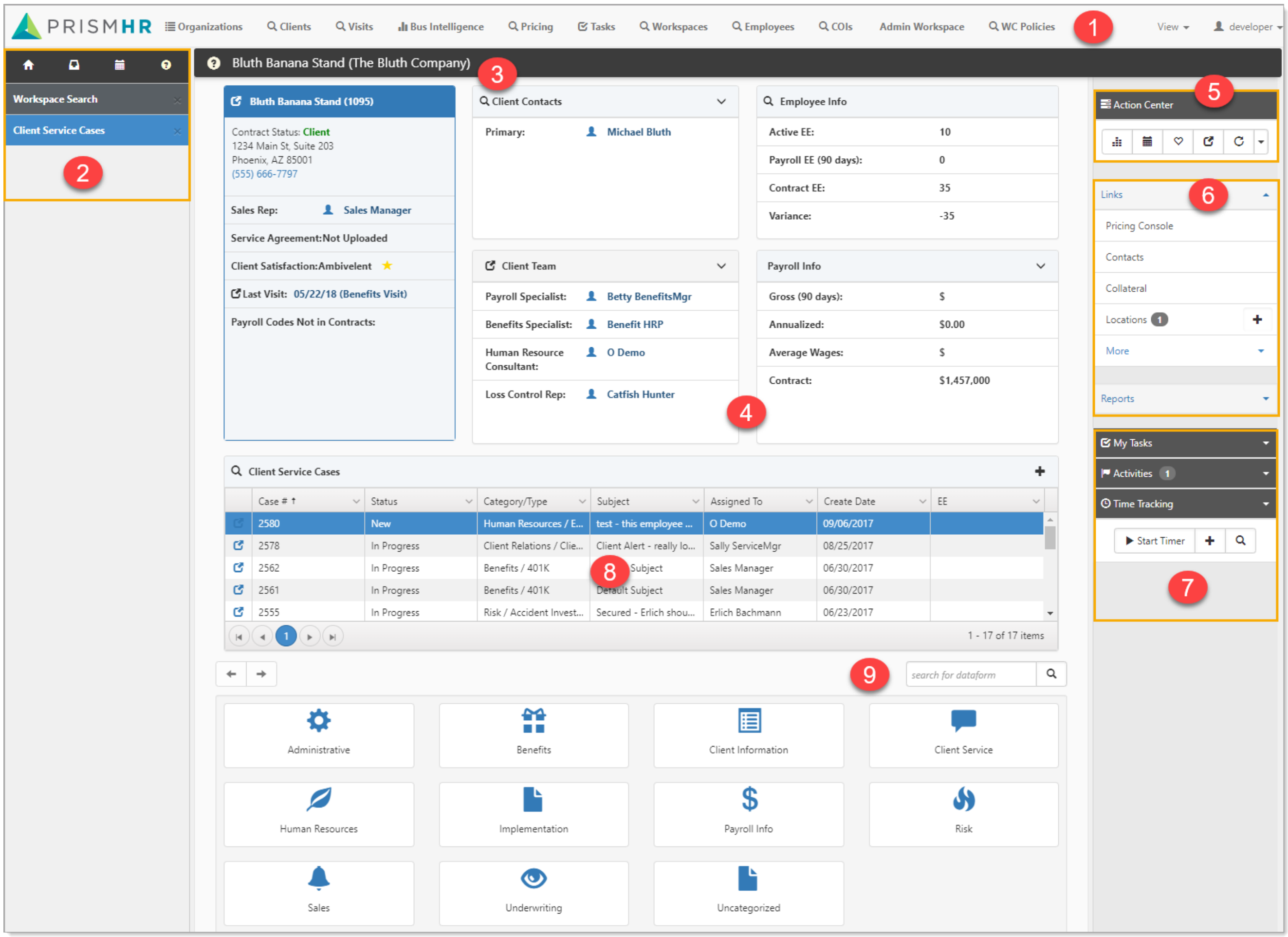
Example: Prospect landing page

The Prospect status is for clients that are in the sales pipeline. The landing page for these workspaces provides access to items appropriate for this stage.



Example: Client landing page

The Client landing page reflects those items you need to track after the client is onboarded.



The numbered items in the Prospect and Client landing page examples correspond to the following list:

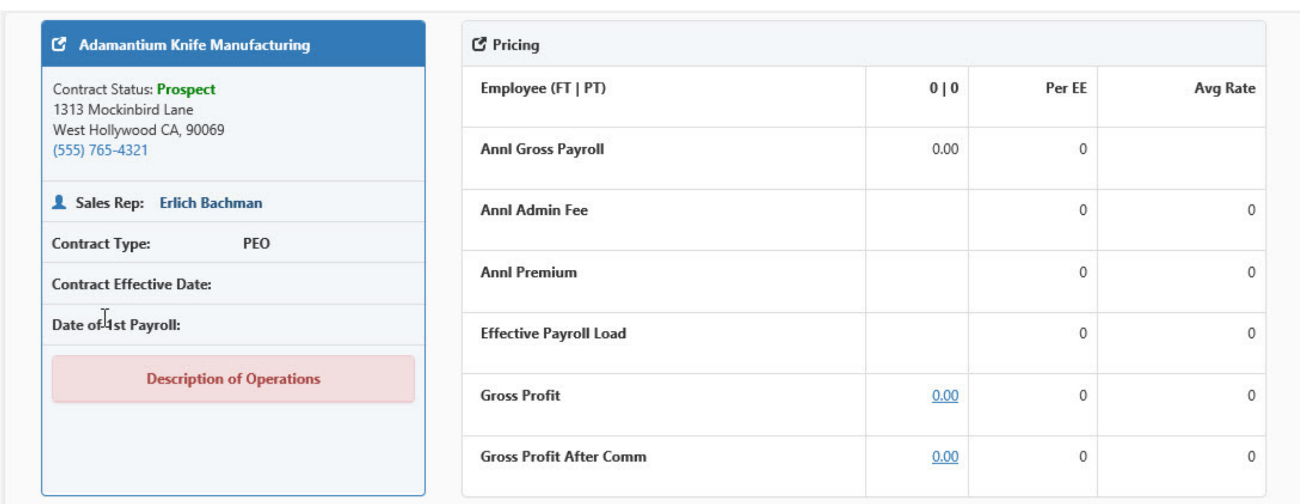
1. **User modules**: User modules are the individual dashboards and tools within ClientSpace that are configurable at the user level. These act as a frequently used modules list for the ClientSpace user. Select a user module to open it in the Work items area.
2. **Work items**: Work items are generally available throughout all stages of client development. This is your multitask list of open items and contains a series of collapsible work items that can consist of modules, such as search and report dashboards, dataforms, tasks and so on.
3. **Header**: The header consists of a dark bar across the top of the page where information can be displayed and a container below it for the workspace landing tiles.

4. **Workspace landing tiles**: Workspace landing tiles are status dependent and designed to give you quick access to the information you need for this client. You can expand most workspace landing tiles for more detail.
5. **Action Center**: Action Center items are generally available throughout all stages of client development.
6. **Links**: Links are configurable and provide a method for accessing the dataforms and reports necessary at this stage of client development. Links commonly include Contacts, Cases, Locations, and more.
7. **My Actions**: The action items at the bottom of the Action Center represent the tasks and activities for client management. If your user account has time tracking enabled, time tracking also displays here.
8. **Lists**: Lists act like pre-filtered dataform lists, allowing you to edit the visible list items, or open for a full search window.
9. **Dataform search**: Dataforms not directly accessible on the landing page through embedded lists or linked to the landing page as Action items are available through the Workspace dataform search at the bottom of the Workspace landing page.

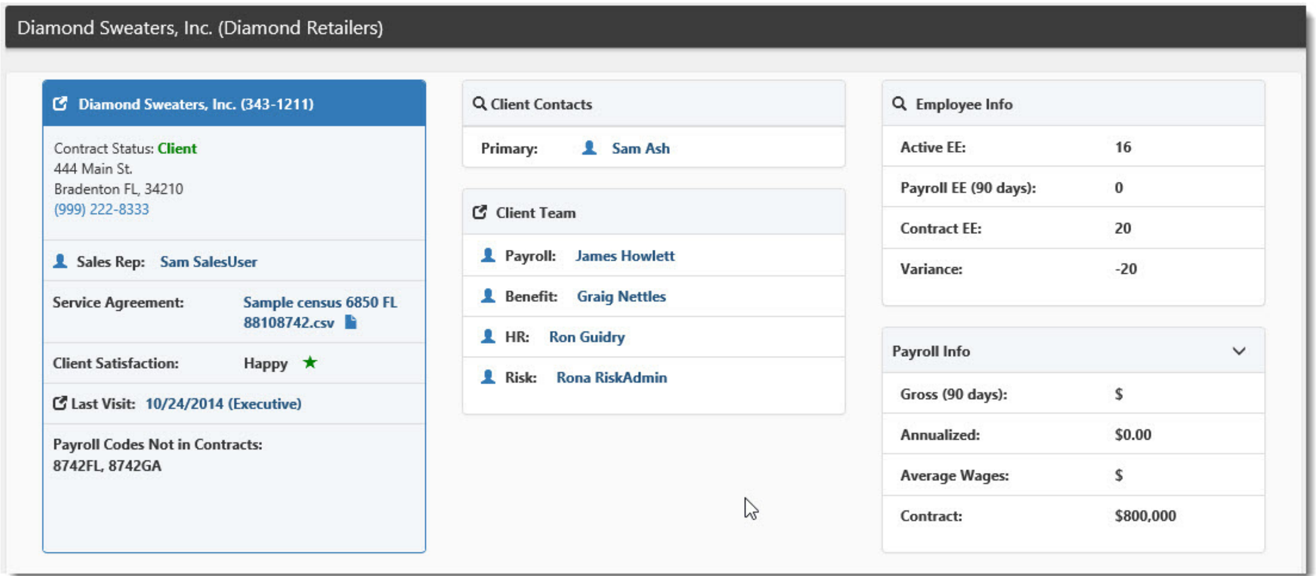
   Dataforms are classified into Groups, and these groups are available from a series of icons at the bottom of the Workspace landing page. Select a dataform item to open it in your Work Center as an active work item.

Workspace landing page tiles (Widgets)

The following image presents a typical set of landing page tiles or panels for a workspace in the Prospect stage. The Prospect stage provides basic client information as well as pricing data.



The following image presents a set of tiles or panels for a workspace at the Client stage. More details become available you complete the client workspace with payroll system imports and client level records.

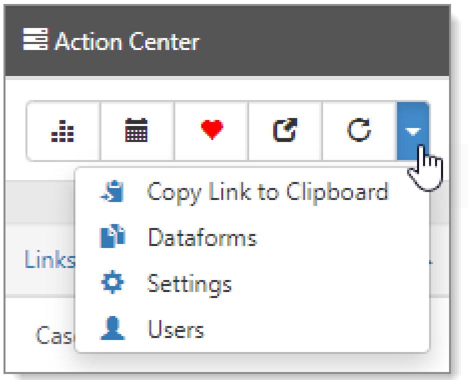


Landing page tiles are a series of panels at the top of the Workspace Landing Page, some of which can expand to reveal more information as indicated by an inverse caret, which can be selected to further expand the panel.

Many of these tiles expand for a more detailed view of the information or underlying dataform. This is generally indicated by an icon in the header of the individual tiles. Currently, expanding a single form or dashboard in the system such as the pricing console is indicated by (**Jump**), whereas opening a multiform record is indicated by (**Search**).

Workspace Action Center

The Workspace Action Center provides a series of common actions that can be performed at the Workspace level.



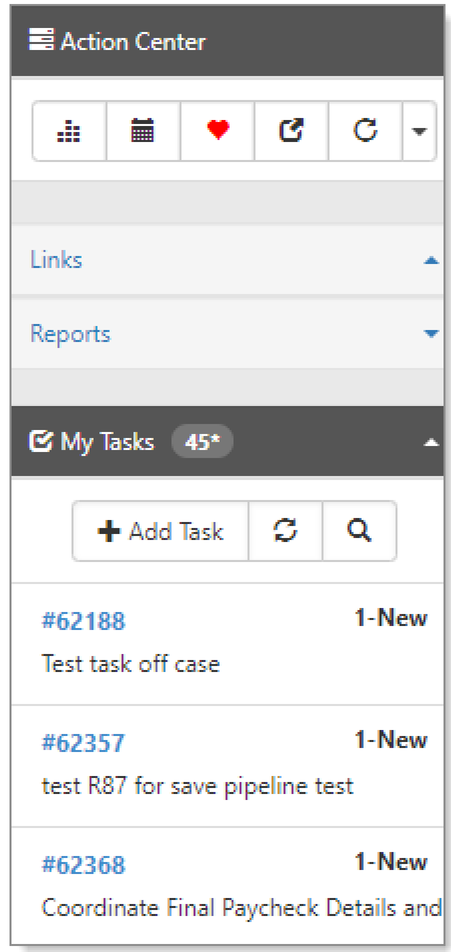
The Action Center toolbar provides the following actions:

	Org acts as a quick jump to the organization associated with the workspace.
	Calendar opens a default calendar, prefiltered for the workspace.
	Favorite adds the workspace to your favorites list. Clicking this icon is the same as checking the Favorite option from the homepage or workspaces dashboard. When selected as a favorite, the heart indicator turns red.
	Jump allows you to skip from one client workspace to another. Jump opens the new client as another item in your work items navigation for easy multitasking.
	Refresh refreshes the current workspace landing page data.
	Copy link to clipboard is available from the Action Center in many places in the application. Click to copy the current URL to your desktop clipboard, which also makes the URL available to paste elsewhere.

Admins only

	Workspace Dataforms	• Click to open Workspace Dataforms. From there, you can Add or Remove dataforms.
	Workspace Settings	• Click to open Workspace Settings for the current workspace.
	Workspace Users	• Click to open a list of Workspace Users. • Add or Remove users from this workspace.

My Tasks



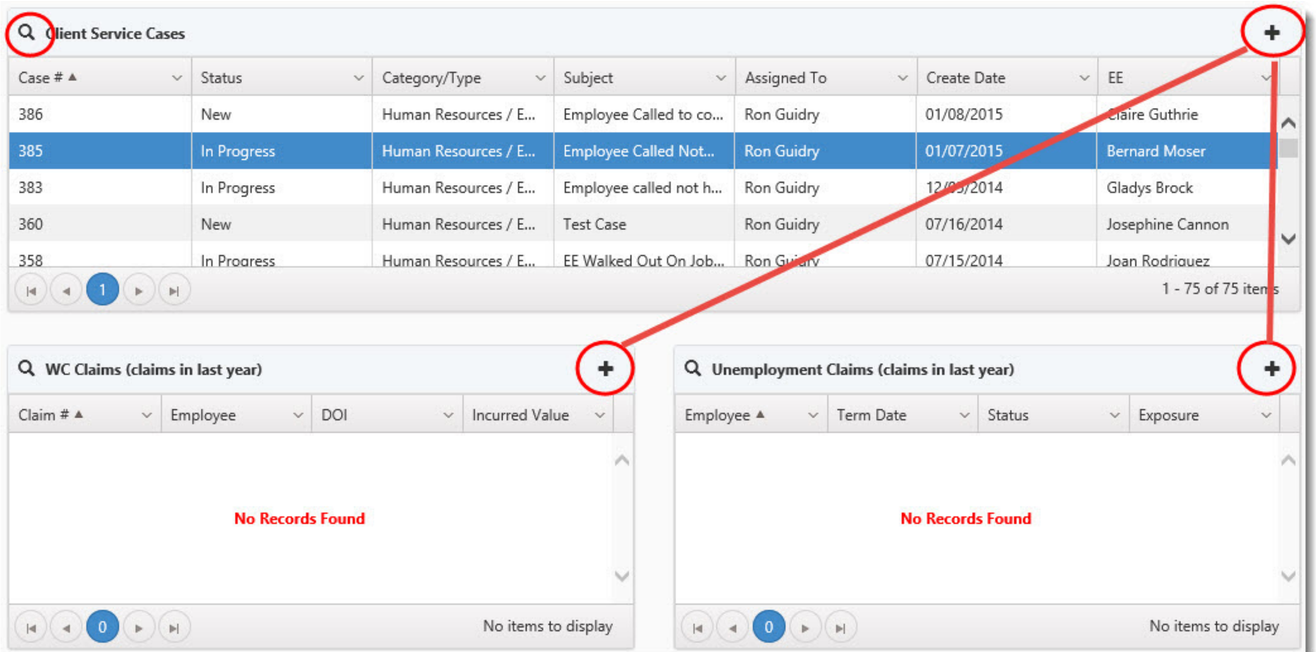
From My Tasks, you can view active tasks and also View Full Search to see active and inactive tasks.

To view all tasks:

1. In the **Action Center**, expand **My Tasks**.
2. Click **View Full Search**.
   The Task Manager dashboard opens. By default, all active and inactive tasks are displayed. The chiclets indicate the applied filters, such as Assigned To and Workspace. Inactive records are displayed in bold and italics.

Workspace landing page lists

Landing page lists are dependent on the workspace stage, presenting pertinent multiform data for that stage. For Clients, these lists represent frequently used multiforms, such as Client Service Cases.



Each multiform list has an add link represented by the plus sign in the upper right corner, as well as the ability to expand to a full-page filterable list using (magnifying glass) to the left of the dataform name.

To expand a record:

- Double-click a selected row. In mobile browsers, an edit button is available.

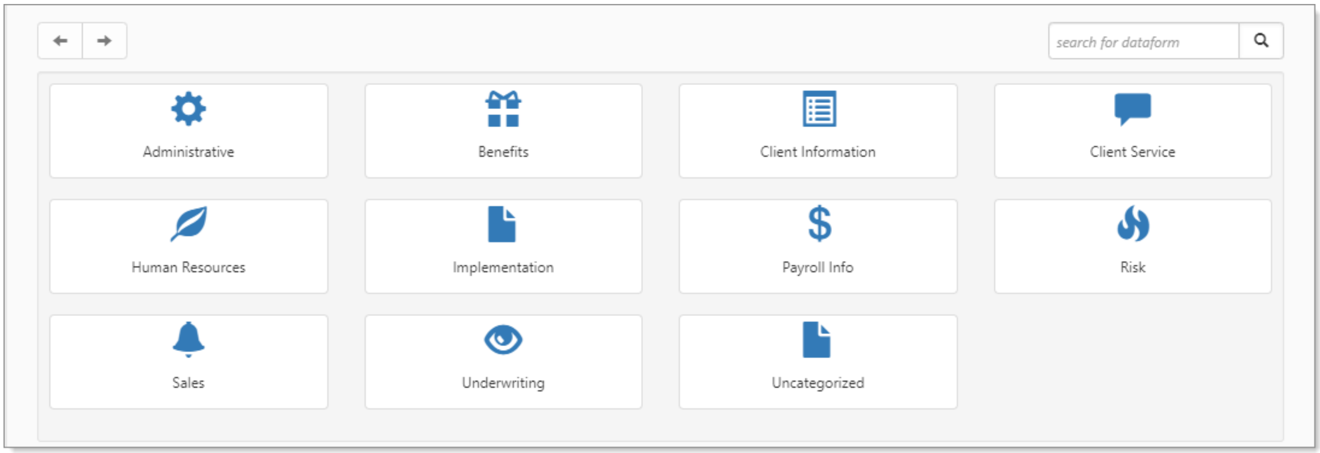
These lists provide vertical scroll for large numbers of records, as well as paging if the record count exceeds what is initially returned in the list when opened.

Searching Workspace dataforms

Each Client Workspace has associated dataforms, with a dataform search function that allows you to access dataforms in multiple ways.

To search:

1. From the modules bar, click **Workspaces**.
   The Workspace Search dashboard opens.
2. Select a workspace and click (**Jump**).
   The Workspace page opens.
3. Move down the page to the administrative tiles where you see the dataform categories.



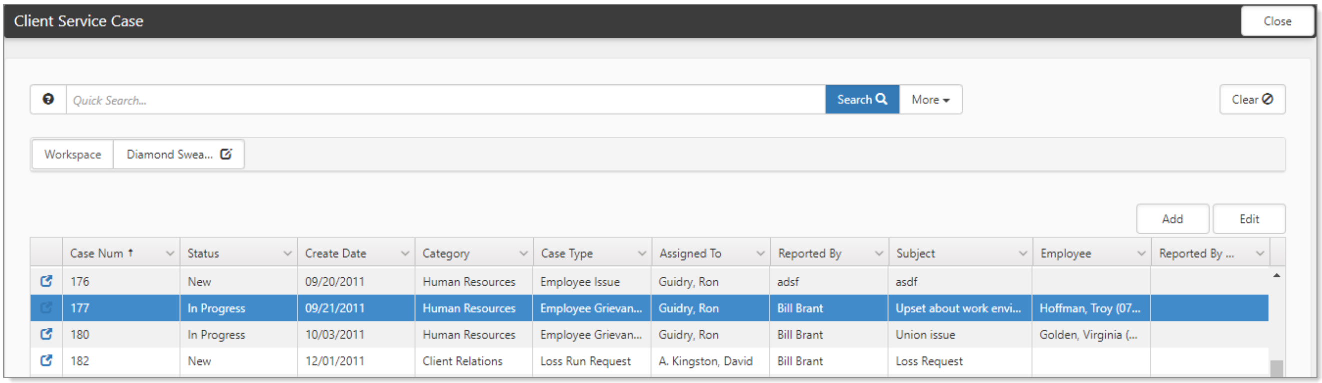
4. Dataforms are categorized, so if you are looking for certain classes of dataforms you can open the associated category and access the dataform.
5. After you have opened a dataform, you can navigate back to the starting point using the convenient navigation arrows in the upper left.
6. To search for a dataform directly, use the *search for dataform* functionality. Simply type in a part of the dataform name and click , and the system finds what you need.
7. Double-clicking or editing a record opens that dataform in the work items area on the left, enabling you to open multiple workspaces and multiple dataforms within those workspaces quickly and easily.

Searching dataform tasks

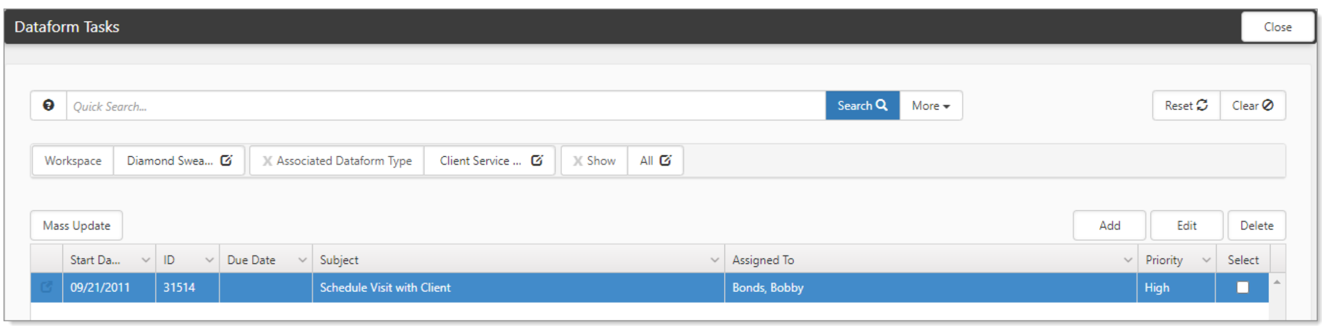
From a workspace, you can open dataforms. And from a dataform, you can search associated tasks. Let's use the Client Service Case dataform as an example.

To search tasks associated with a dataform:

1. From the modules bar, click **Workspaces**.
   The Workspace Search dashboard opens.
2. Select a workspace and click (**Jump**).
   The Workspace page opens.
3. Move down the page to the administrative tiles where you see the dataform categories.
4. Select a dataform.
   The selected dataform dashboard opens. Our example uses Client Service Case.



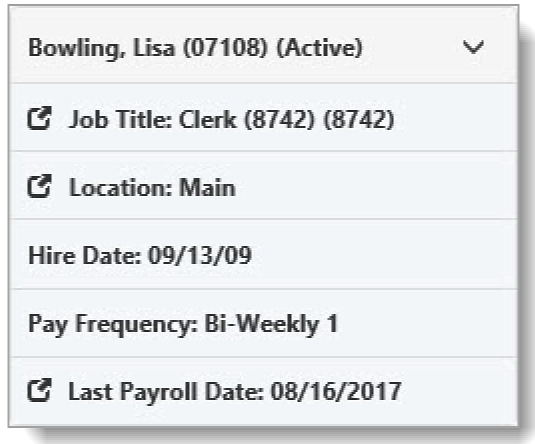
5. Select an entry and click (**Jump**).
   The selected entry opens. Our example is a case.
6. In the **Action Center**, expand **Tasks**.
   The active tasks display. When there are inactive tasks, the badge counter shows the quantity with an * (asterisk).
7. To view all dataform tasks, click **View Full Search**.
   The Dataform Tasks dashboard opens. By default, all active and inactive tasks are displayed. The chiclets indicate the applied filters. Inactive records display in bold and italics.



8. To view only active tasks, on the chiclet, click **X** Show All.
   This action removes the filter to display only active tasks.

Widget: Employee Detail Info

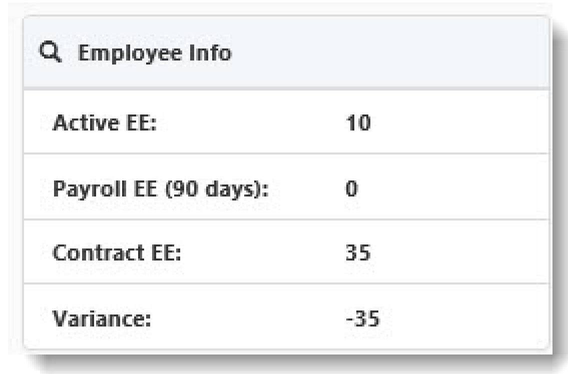
The Employee Detail Info widget is on the Workers' Comp Claim and other Employee related forms. This widget provides insight into the details of the Employee / Employment records without the need to expand the record.



Widget Definition	
Employee Data	Employee name (EmployeeID) (Status).
Job Title	Current Employee Employment Job Title (Workers Comp Code). Click (**Jump**) to open the Employment record.
Employee Location	Current Employee Employment Location. Click (**Jump**) to open the Location record.
Last Hire Date	From the Employment Record.
Pay Frequency	From the Employment Record.
Last Payroll Date	Most recent Pay Date from Employee Voucher records. Click (**Jump**) to open the Employee Voucher record.

Widget: Employee Info

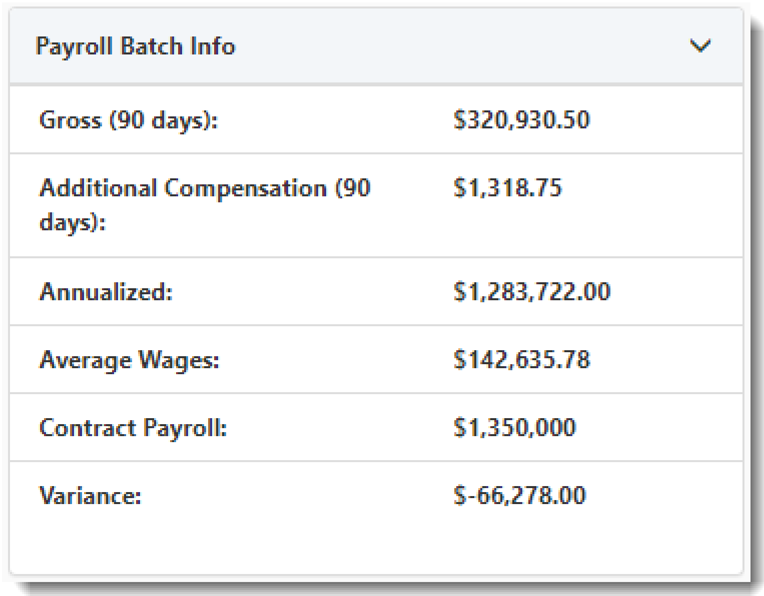
The Employee Info widget is on the Workspace Landing Page when the Client Master Status is Client, Pending Termination, or Terminated. This widget provides insight into the variance of employee counts from the Pricing Batch in relation to actual payrolls produced. Employee numbers may appear skewed in specific scenarios where the client is seasonal or in cases where there are gaps in pay for employees.



Widget definition	
Active EE	Count of the Employee records in the workspace where the Employment Status = Active.
Payrolled EE (90 days)	Count of distinct Employee IDs for Payrolls in the last 90 days.
Contract EE	Sum of Employee Counts for each WC Code on the current activated Pricing Batch.
Variance	Difference between the Payroll EE and Contract EE.

Widget: Payroll Batch Info

The Payroll Info widget is on the Workspace Landing Page when the Client Master Status is Client, Pending Termination, or Terminated. This widget provides insight into the variance of the proposed payroll from the Pricing Batch concerning actual payroll. Payroll numbers may appear skewed in specific scenarios where the client is seasonal or in cases where there are gaps in pay for employees.



Widget Definition	
Gross (90 days)	The sum of Gross Payroll values for the last 90 days based on the Pay Date where the payroll batch record has a **Batch Type** of R (Regular).
Additional Compensation (90 days)	The sum of additional compensation values for the last 90 days based on the Pay Date where the payroll batch record has a **Batch Type** of S (Special).
Annualized	The sum of Gross (90 Days) multiplied by 4.
Average Wages	The Annualized Payroll divided by a count of distinct Employees paid in the last 90 days.
Contract Payroll	The sum of Gross Payroll for each WC Code on the current activated Pricing Batch.
Variance	The difference between the Annualized Payroll and the Contract Payroll.

Creating a Workspace

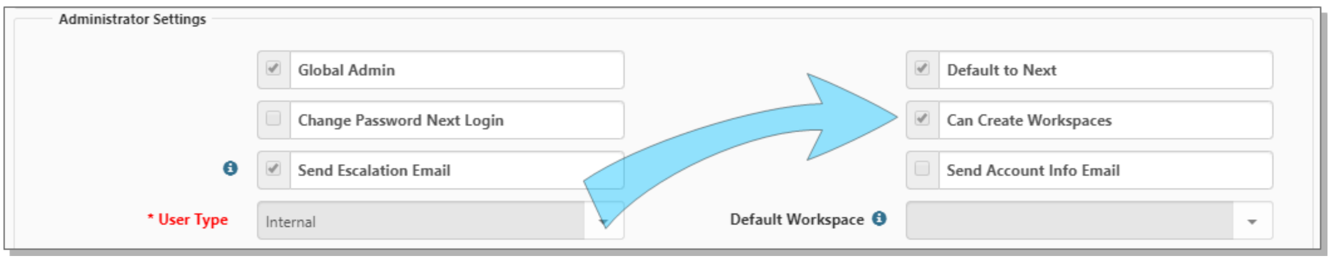
Use the Create Workspace feature on the Workspaces module to quickly create a Workspace from a Template. The link is hidden unless **Can Create Workspaces** is enabled. This option is on the User Profile in Administrator Settings.

You need the following to create a workspace:

- **Can Create Workspaces** option enabled on your user profile.
- Access to **System Admin** > **Modules**.

To enable Can Create Workspace:

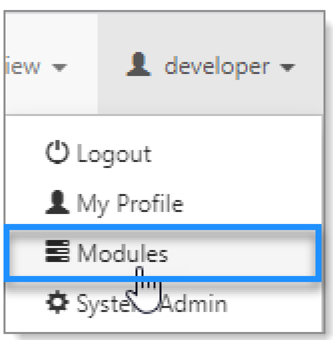
1. Go to **<username>** > **My Profile**.
   The User Details form opens.



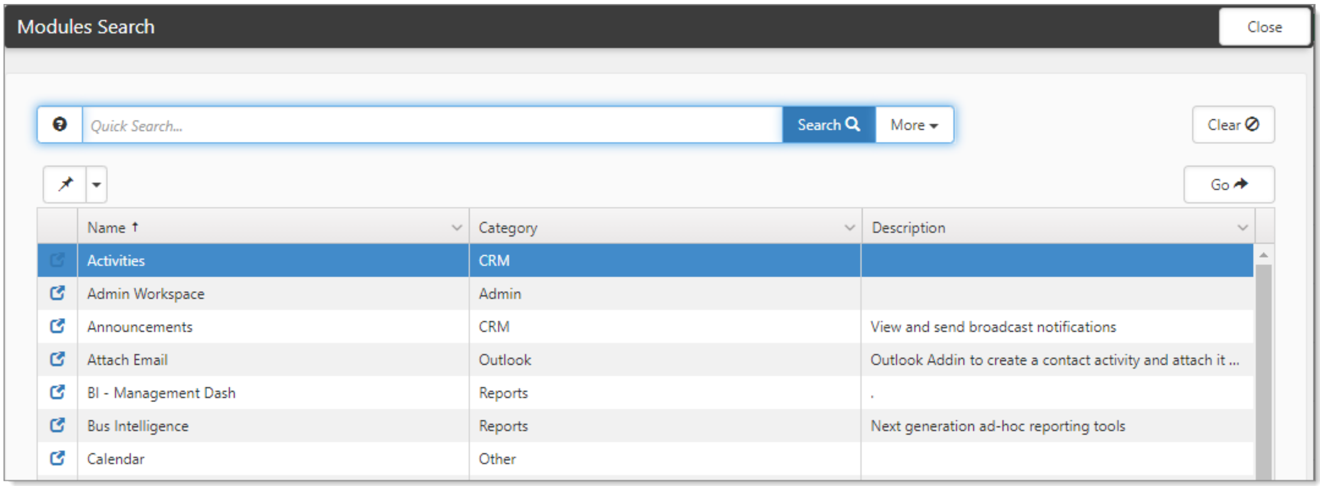
2. In the **Administrator Settings** fieldset, review the setting for **Can Create Workspaces**.
3. If disabled, select the option **Can Create Workspaces**.
4. Click **Apply** or **Save**.

To add a Workspace:

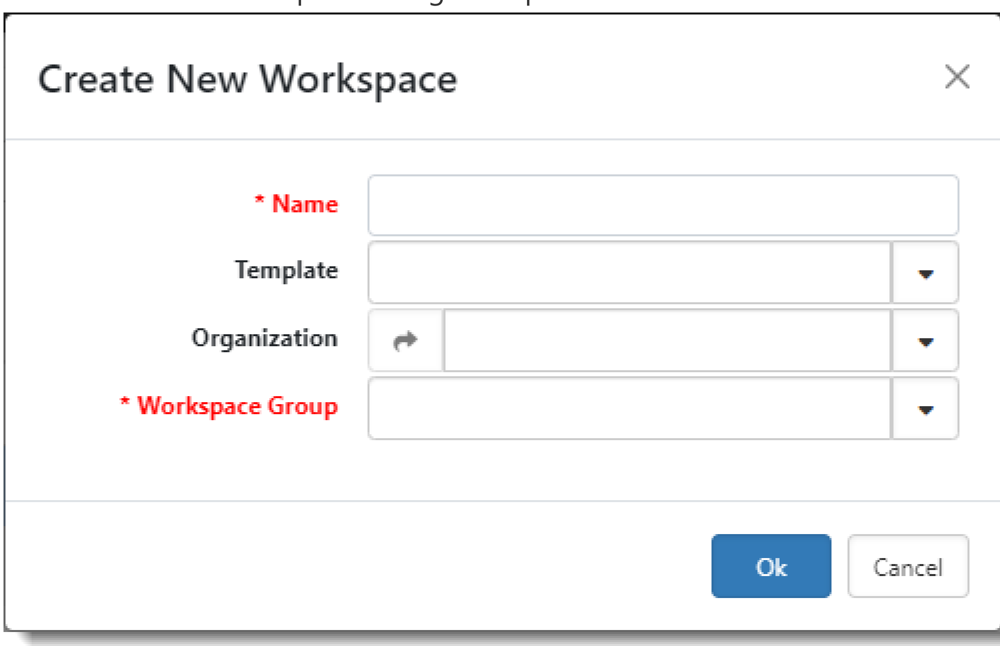
1. Go to **<username>** > **Modules**.



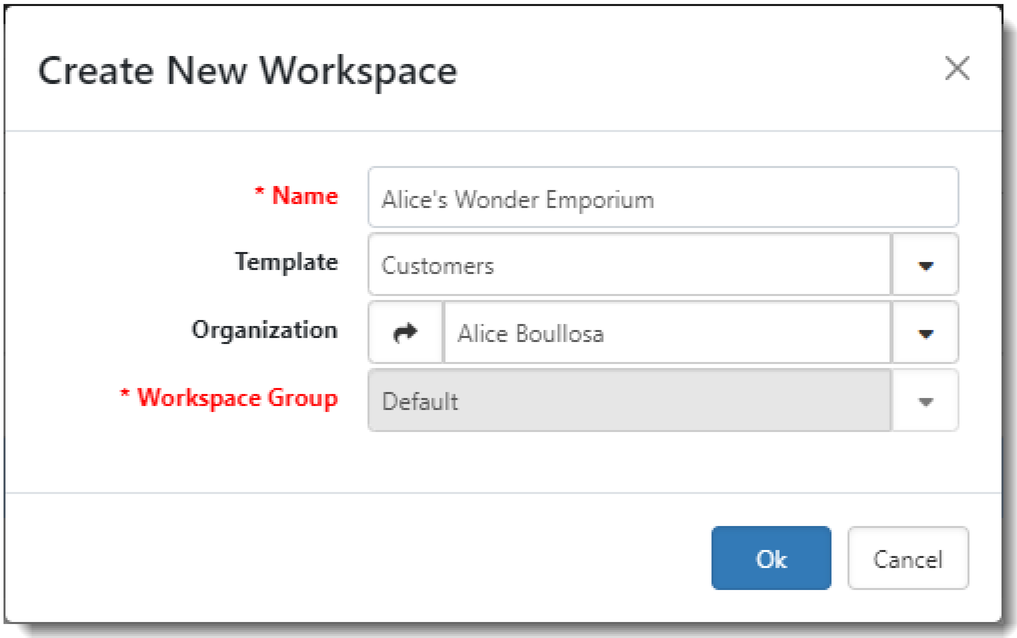
The Modules Search dashboard opens.



2. Select **Workspaces**, and click **Go**.
   The Workspace Search dashboard opens.
3. Click **Create Workspace**.
   The Create New Workspace dialog box opens.



4. Enter a **Name**.
5. **Template** options are filtered by Templates that are set to **Allow Manual Creation**.
   If you select a template, **Workspace Group**, a required field, defaults to the **Workspace Group** associated with the template and the field becomes read-only.



Note: Workspace Groups support workflows in ClientSpace. For instance, a designated Workspace Group may control whether the case types associated with a case category are available for selection when adding and managing cases within the workspace. For example, you may determine that case types in the Accounting category may only be associated with the Clients and Prospects Workspace Groups.

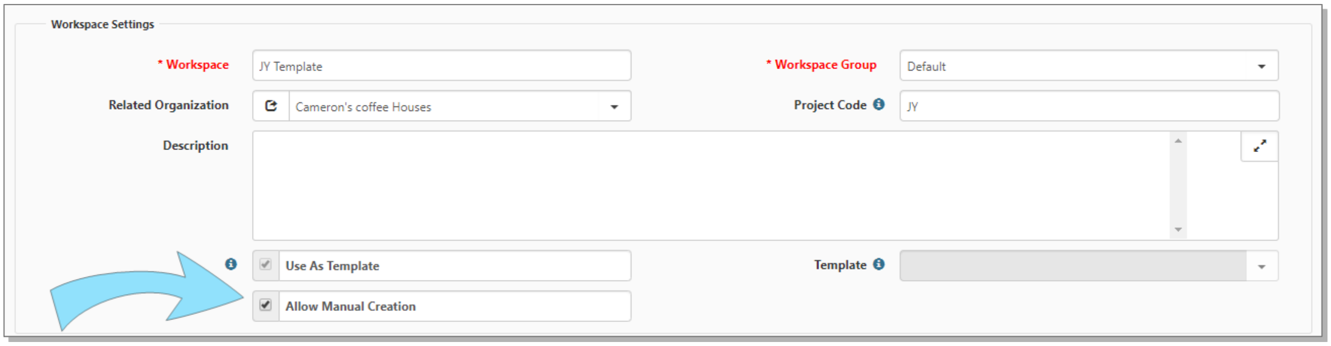
6. Select an **Organization**.
7. Select a **Workspace Group** such as Clients, Prospects, etc. if you did not specify a template in Step 5 above.
8. Click **Ok**.

To review the available templates:

1. Go to **System Admin** > **Workspace Templates**.
   The Workspace Template Search dashboard opens, displaying the available Workspace Templates.

To set a template to Allow Manual Creation:

1. Go to Workspaces and open the targeted workspace.
2. In the **Action Center**, select **More Options** > **Settings**.
3. Select the option **Allow Manual Creation**.

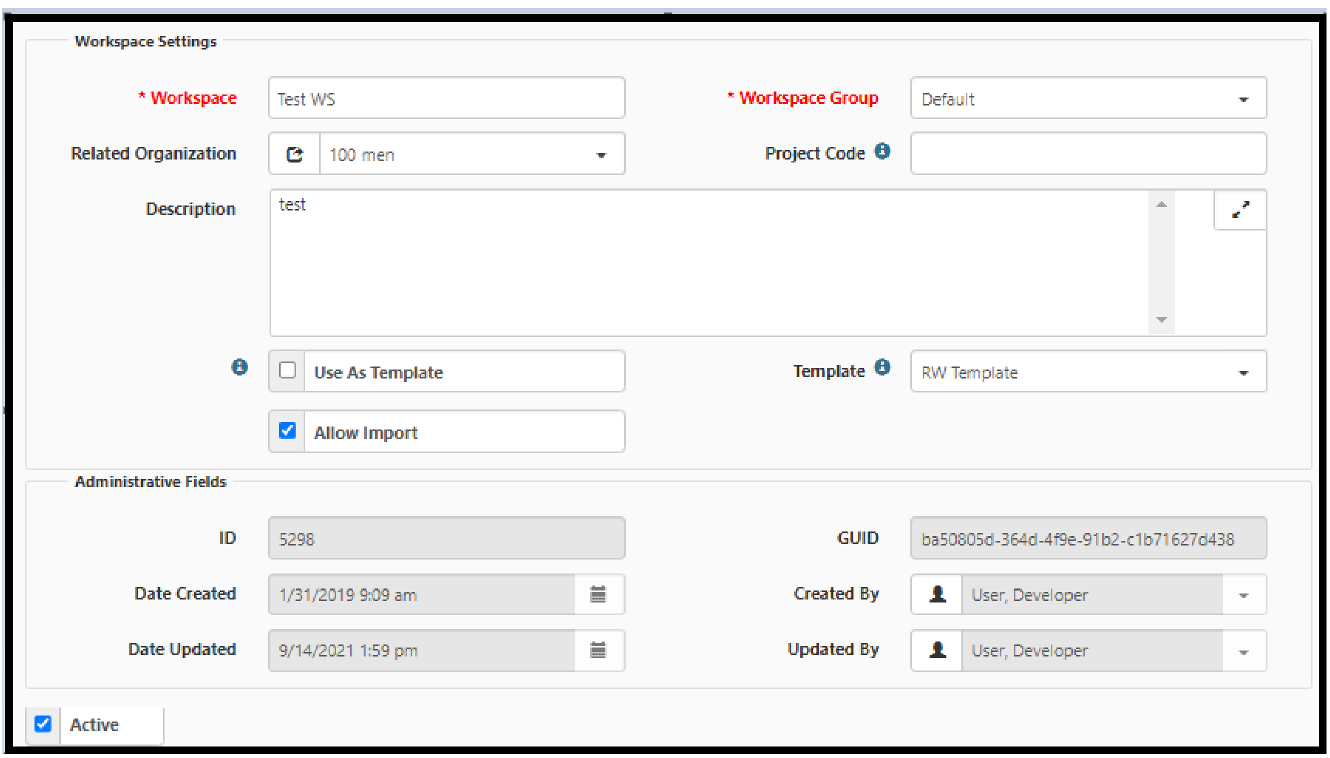


4. Click **Save**.

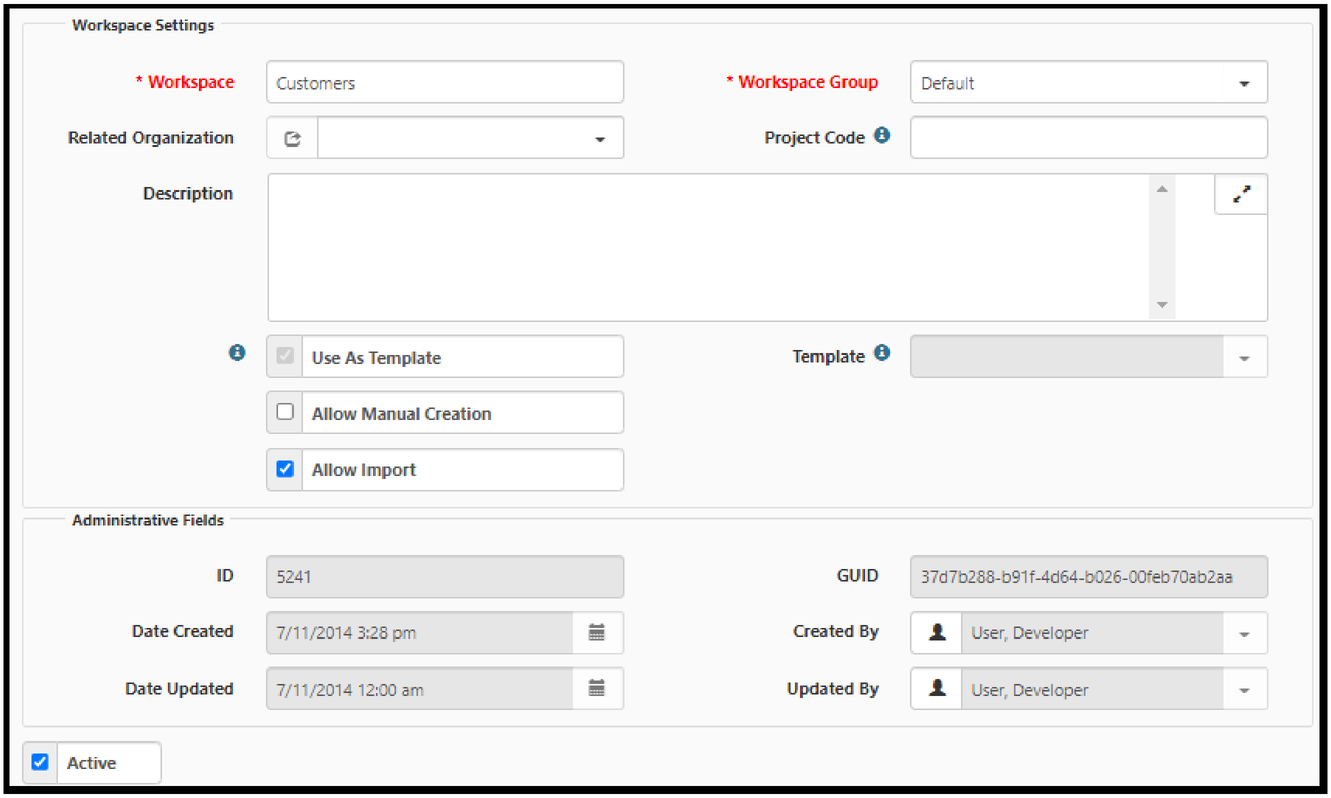
Workspace Settings

The Workspace Settings form contains a list of settings that the system uses for a workspace. When setting workspace settings, you can set the workspace for use as a workspace template when creating or maintaining other workspaces.

The following graphic illustrates the Workspace Settings for a workspace.



The following graphic illustrates the Workspace Settings for template workspaces (System Admin > Workspace Templates).



To maintain workspace settings from a workspace:

1. Open the Workspaces module.
   The Workspace Search dashboard displays.
2. (Optional) Use the **Quick Search** and/or **More** search options to filter the items that display in the dashboard.
3. Select (Jump) for the row that contains the workspace, or select the name of the workspace.
   The workspace opens.
4. In the **Action Center** toolbar, click (**More Options**), and select **Settings**.
   The Workspace Settings form opens.

5. Complete the form fields as necessary.

Workspace Settings Fields

Field	Description
Workspace	Indicates the name of the workspace.
Workspace Group	Indicates the workspace group to associate with the workspace.
Related Organization	Indicates the name of an organization to associate with the workspace.
Project Code	Indicates a unique code to associate with the workspace.
Description	Enter text to describe the workspace.
Use As Template	Indicate whether to use these workspace settings as a template for use when creating or maintaining other workspaces. **Note:** If you select this option, the system disables the Template field for the workspace settings. Designating a workspace as a template will make it available for cloning during workspace creation. Workspaces created from a template will inherit its users and dataforms. This action cannot be undone.
Template	Select a template to use as the base workspace settings for this workspace. **Note:** Changing the workspace template will rebuild the workspace, inheriting the user and dataform values configured on the selected template.
Allow Manual Creation (For Developer Use Only)	**Note:** This option is available when the **Use As Template** option is selected. Select this option to allow an administrator to use this workspace settings template when manually creating a workspace.
Allow Import	If this option is checked, the system will allow importing into this workspace. If this option is unchecked, the system does not allow importing into this workspace, and the system displays an error when a user attempts to import into this workspace. **Note:** Only a developer user can select or deselect this option.

6. Click **Save**.

To maintain workspace settings from a workspace template:

1. Select **System Admin**
2. Select **Workspace Templates**
   The Workspace Template Search dashboard displays.
3. (Optional) Use the **Quick Search** and/or **More** search options to filter the items that display in the dashboard.
4. Select (Jump) for the row that contains the workspace template, or select the name of the workspace template.
   The workspace template opens.
5. In the **Action Center** toolbar, click (**More Options**), and select **Settings**.
   The Workspace Settings form opens.

6. Complete the form fields as necessary.

Workspace Settings Fields

Field	Description
Workspace	Indicates the name of the workspace.
Workspace Group	Indicates the workspace group to associate with the workspace.
Related Organization	Indicates the name of an organization to associate with the workspace.
Project Code	Indicates a unique code to associate with the workspace.
Description	Enter text to describe the workspace.
Use As Template	This field is not available to edit since the workspace settings were set as a template.
Template	This field is not available to edit since the workspace settings were set as a template.
Allow Manual Creation	**Note:** This option is available when the **Use As Template** option is selected. Select this option to allow an administrator to use this workspace settings template when manually creating a workspace.
Allow Import	If this option is checked, the system will allow importing into this workspace. If this option is unchecked, the system does not allow importing into this workspace, and the system displays an error when a user attempts to import into this workspace. **Note:** Only a developer user can select or deselect this option.

7. Click **Save**.

Chapter 7

The Client Master Dataform

Both the workspace and the Client Master are inextricably linked because the Client Master dataform holds important company information. In that regard, it is similar to a ClientSpace Organization record, a Salesforce Account record, or a PrismHR Client Details record.

In this topic, we describe the process leading up to when a Client Master record is created. In related topics, we break down the major components of the Client Master record.

ClientSpace CORE with Sales Module: It All Begins with a Prospect...

If your company uses the ClientSpace Sales module, prospect information is first entered in an Organization record which is then used to create a workspace and Client Master record.

When the workspace is created is up to your company. For instance, you may only want to create a workspace once the contract is signed and the client is being moved to Implementation phase or you may want to create the workspace earlier.

Here are several ways you can initiate the creation of the of the workspace and Client Master:

- You can create a workspace directly from an Organization record by clicking the **Create Client** link in the Action Center.
- You can create a workspace directly from an Organization record by clicking the **New Implementation** link in the Action Center. See Creating a Workspace from an Organization.

  Note: This feature is used by companies that do not use the ClientSpace Sales module. The sale has been made and it is now time to begin the implementation phase to onboard the client. Clicking the **New Implementation** link uses the same business logic as clicking the **Create Client** link except that it does not prompt the user to enter a **Client Number** and it automatically sets the **Org/Contract** status on the workspace to "Implementation".
- If you have appropriate access permissions, you can manually add a workspace by clicking **Create Workspace** on the **Workspaces** module dashboard. See Creating a Workspace.

ClientSpace CORE Only

If your company only uses our CORE module and does not track prospect details in ClientSpace using the ClientSpace Sales module, you may track prospect, organization and sales information in a third-party application such as Salesforce and use the ClientSpace Salesforce API to import data to ClientSpace which is then used to automatically create the organization record, workspace and Client Master. Or, you may import company information from PrismHR.

If you have appropriate access permissions, you could also opt to manually create a workspace by clicking **Create Workspace** on the **Workspaces** module dashboard. See Creating a Workspace.

More About Manual Workspace Creation...

As mentioned in the prior two sections, you can manually create a workspace (although this is a more labor intensive option). Keep in mind that "Manual" does not mean that the workspace is created completely "from scratch". When ClientSpace is set up, at least one workspace settings template is configured to use. (You may only have one that you use as the default template for creating and maintaining all workspaces or you could have more than one.) When you manually create a workspace, you are prompted to pick the workspace settings template that you want to use to create the workspace.

The Client Master Workspace Connection

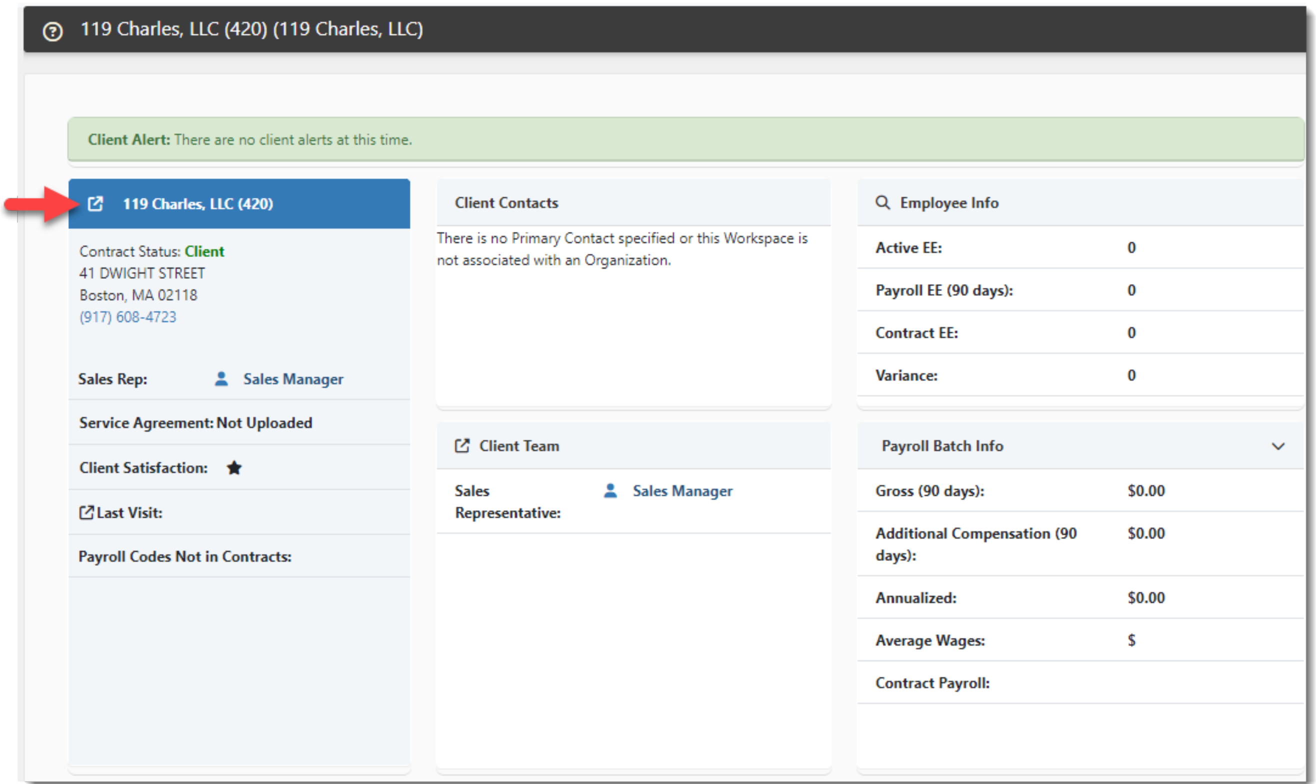
Regardless of *how* the workspace is created, the Client Master record is created *when the workspace is created*. The Client Master record is classified as a single dataform (also known as a singleform) because there can only be one Client Master record per workspace.

You can track a client prospect from the RFP phase up until the prospect either becomes a client or the RFP is "killed" in a Workspace.

The Client Master Dataform: An Integral Part of the Workspace Hub

The workspace landing page that displays when you first open a workspace is the main hub for client data. The workspace landing page resides in the **Workspaces** module of ClientSpace. One of the most important dataforms associated with a workspace is the Client Master record. The Client Master record resides in the **Clients** module but can be accessed from other locations, including the **Workspaces** module. For instance, the Client Master record is frequently accessed from the workspace landing page by clicking (**Open**) at the top of the **Client Info** widget.

Note: We will provide a more detailed overview of the **Client Info** widget later in this topic.

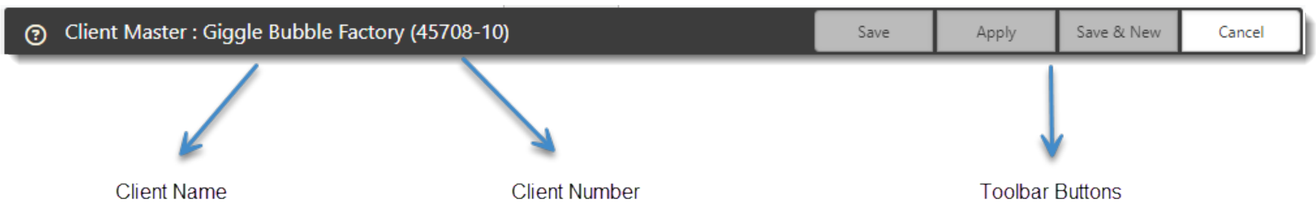


Client Master Breakdown

In this topic, we define the major components of the Client Master dataform.

Header

The header displays the **Client Name**, **Client Number** in parentheses, and displays toolbar buttons.



Default Widgets

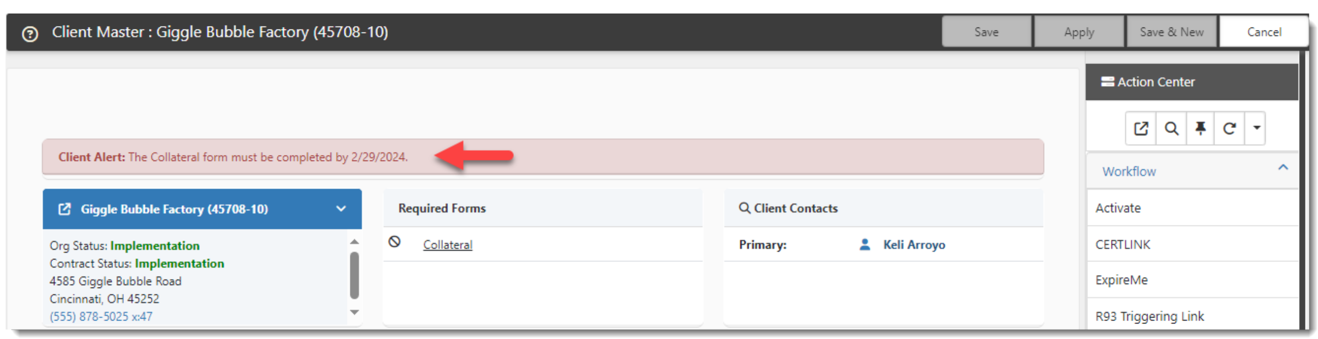
The default, "out of the box" configuration of the Client Master displays four (4) widgets at the top of the form:

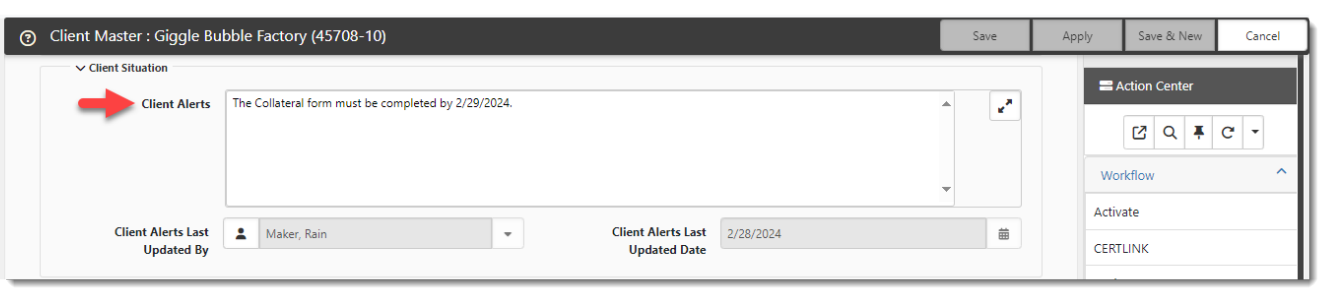
- Client Alert
- Client Info
- Required Forms
- Client Contacts

> Widgets can be added, removed, or rearranged on any dataform by a user with Global Administrator access. See Adding widget layouts.

Client Alert

The Client Alert widget displays text entered in the **Client Alerts** field of the Client Master dataform as a banner at the top of the Client Master Dataform.





Note: Although the text that displays on the Client Alert banner is added and maintained on the Client Master dataform, the widget is frequently added to other dataforms including the Client Service Case, Client Visits, Workspace landing page, and others.

Also seeLearning how: Client Alerts.

Client Info

The Client Info widget displays a client information snapshot. Basic information such as the **Org Status** and **Contract Status** is displayed as well as a company address and phone number.

Note: **Org Status** and **Contract Status** values may vary depending on whether your company uses the ClientSpace CORE and Sales modules or ClientSpace CORE only. For instance, "CORE and Sales" users may see Implementation, Client, Pending Termination, and Termination. "CORE only" users may see all of the aforementioned statuses except the Implementation status.

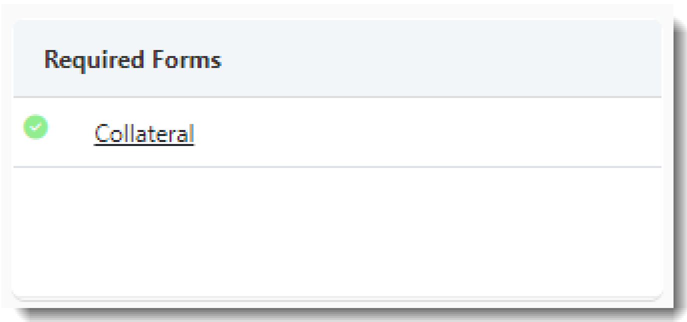
If you click the down arrow in the widget header, you can also see additional information such as the Sales Representative's name, a **View** link to the Service Agreement (if uploaded), the client satisfaction level, and the date of the last client visit.

Note:

- Depending on the dimensions of the widget (set in the widget layout), you may have to scroll within the widget to see the additional fields after clicking the down arrow.
- Client satisfaction in the widget is only populated if the **Satisfaction Level** field (which is typically located in the Client Situation fieldset of the Client Master) is populated.

Required Forms

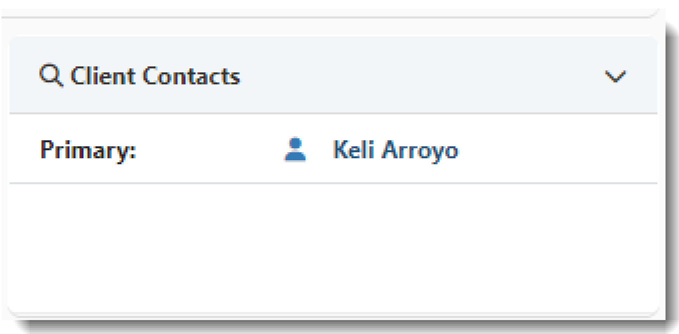
The Required Forms widget displays a list of client forms that must be completed. A green check mark displays next to completed forms.



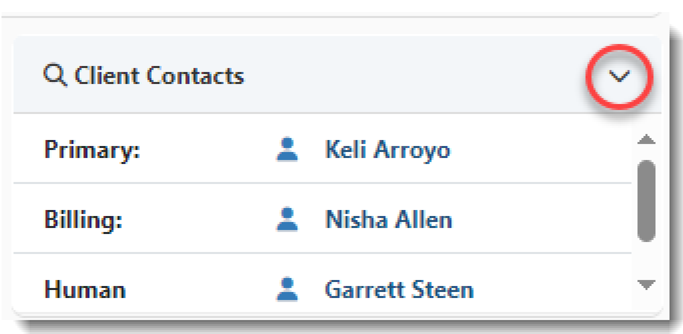
Also see What makes a dataform required?

Client Contacts

The Client Contacts widget displays the contacts associated with the organization. By default, only the Primary Contact displays. You can set the kinds of other contacts that display on Client Contacts widget in the widget settings. See Configuring the Client Contacts widget.



If you click the down arrow in the widget header, you can view additional contacts.



Note: Depending on the dimensions of the widget (set in the widget layout), you may have to scroll within the widget to see the additional contacts after clicking the down arrow.

Fieldsets

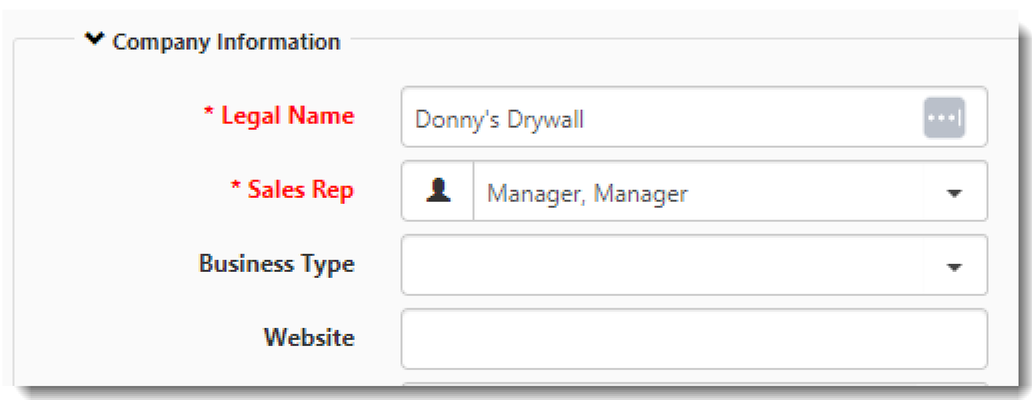
In this section, we define the fields by fieldset for fields located on the Client Master dataform, with exception of any custom fields that were set up specifically for your company.

Note:

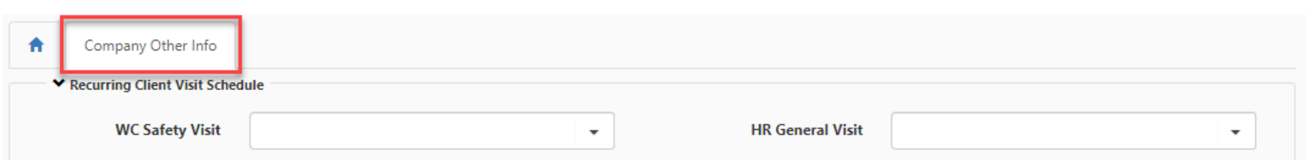
- The order and placement of fieldsets and fields may vary depending on configuration.
- All fieldsets, even if they are not custom fields, may not be present on the Client Master dataform for your company. The fieldsets that display depend on the modules and features of ClientSpace that your company uses.
- Fieldsets on ClientSpace dataforms, including the Client Master, can be expanded to display all fields or collapsed to hide fields. See Adding Dataform Fields.

About Client Master Tabs

Whether or not the Client Master displays as a multi-tabbed window depends on your configuration. For instance, there may only be a single page of fields with no additional tabs displayed:

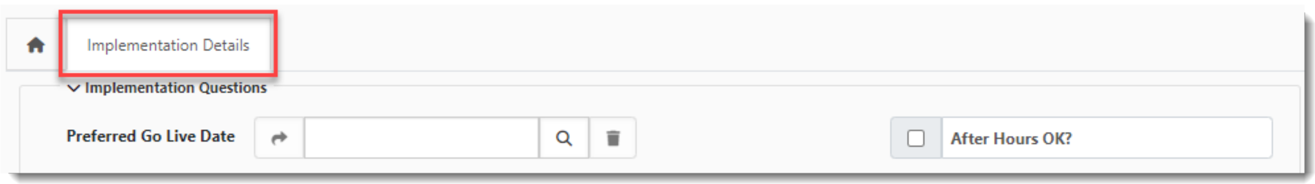


Or, if ClientSpace is configured to use our Recurring Client Visits feature, for instance, the primary fields may display on a **Home** tab (🏠) and there may also be a **Company Other Info** tab containing fields for tracking client visits as depicted in the example below:



Also see Configuring Recurring Visits.

Alternatively, the primary fields may display on a **Home** tab ( ) as in the previous example and there could also be one or more custom secondary tabs containing fields that were requested by your company to support your business needs. In the example below, an **Implementation Details** tab has been added to the Client Master to capture client implementation information:



Primary (or Home Tab) Fields

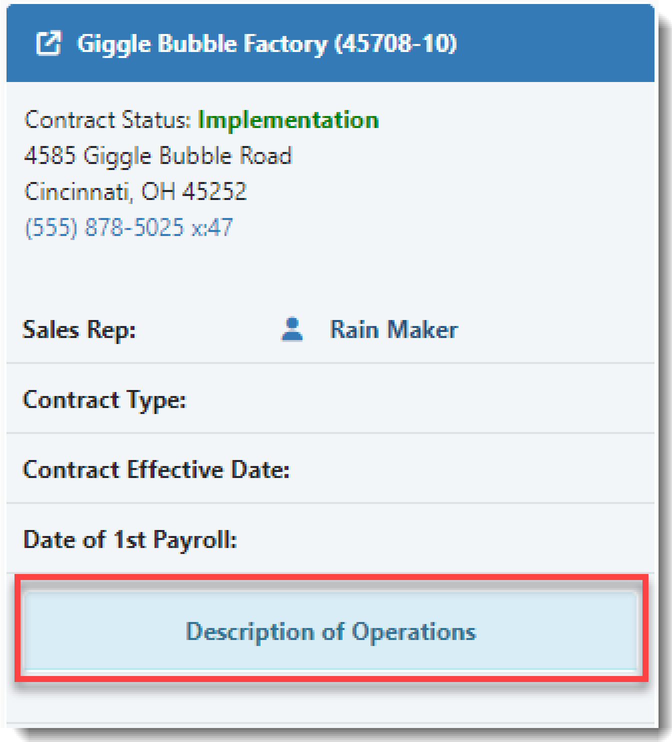
Company Information

Legal Name	Legal name of the company. **Note:** • If the Client Master was created from an Organization record, this value is populated using the **Name** field on the Organization record. Keep in mind that the Organization record allows you to enter the name of the organization as known at the time. • The company name may also be imported from PrismHR. If so, any required changes to the company name should be made in the PrismHR software.
DBA	Name the organization is currently "doing business as".
Sales Rep	Salesperson who onboarded the client.
FEIN	The Federal Employer Identification Number (FEIN) is used to identify an employer for tax administration purposes.
Business Type	Used to briefly describe the business. **EX:** Hospitality. **Business Type** is selected from a drop down list.
Source	Indicates how the lead for this client originated. **EX:** Referral. **Source** is selected from a customizable drop down list.
Website	The URL of the organization website.
Phone	The phone number for the organization. From here, you can click to call the client using an installed phone app such as RingCentral.

Fax	The fax number for the organization. From here, you can click to fax the client using an installed fax app such as eFax.
NAICS	North American Industry Classification System (NAICS) is a standard 6 digit code used to classify businesses by Federal agencies who collect, analyze, and publish statistical data related to the U.S. economy. To find an NAICS code, go to https://www.naics.com/search/. You can also type the Wildcard (%) Search symbol followed by the first few characters of the NAICS classification to jump to an entry in the list.
Address 1, Address 2	Organization address. **Address 2** is used for additional data such as a Suite #.
City, State, Postal Code, County	Organization city, state, postal code, and county. If you add the Client Master record from an Organization record, these fields are auto-filled from the Organization record. If you add this information manually, upon entering the Postal Code, the City, County, and State are populated.

Additional Company Information

Corporation Type	A corporation is a company or group of people authorized to act as a single entity (legally a person) and recognized as such in law. The corporation type is specified here. **EX:** C Corp or S Corp. **Corporation Type** is selected from a drop down list.
Date of Incorporation	The date the company was legally formed.
SIC Code	The Standard Industrial Classification (SIC) code is a 4 digit numeric business classification code that categorizes an industry based on the company's business activities.
Parent Company	A company that controls or is controlled by another company, often one that is in the same business group.
Description of Operations	A text field used to enter a brief description of an organization's business operations. This description also displays when you click the **Description of Operations** button on the **Client Info 2** widget.

<table>
<tr>
<td></td>
<td>


Note: The **Client Info 2** widget is an extended version of the Client Info widget that includes a few additional fields such as **Date of First Payroll** and **Description of Operations**. This widget is commonly used on workspace landing page widget layouts.
</td>
</tr>
<tr>
<td>WC Deductible</td>
<td>This field was added to support the Claim Deductible Billing process and only displays if ClientSpace is configured for that feature. The **WC Deductible** is used in Claim Deductible Billing calculations. The system checks to the **WC Deductible** against the total claim financials amount of a claim to determine the amount of the Claim Deductible Bill. See Configuration and Process Overview of the Claim Deductible Billing Process.</td>
</tr>
<tr>
<td>WC Deductible Bill Opt-Out</td>
<td>This field was added to support the Claim Deductible Billing process and only displays if ClientSpace is configured for that feature. When checked, the **WC Deductible Bill Opt-Out** setting excludes a client from claim deductible bill processing. To be included for claim deductible billing, Claim Deductible Billing records must be in "Ready to Bill" status and the **WC Deductible Bill Opt-Out** setting on the Client Master record of each associated client workspace must be unchecked. See Configuration and Process Overview of the Claim Deductible</td>
</tr>
</table>

	Billing Process. **Note:** Both the **WC Deductible** and the **WC Deductible Bill Opt-Out** fields are for use with the ClientSpace Risk module only.

Sales/Broker Information

Sales Region	Used to identify the geographical area or segment of customers assigned to a Sales representative or broker. These list options are customized to how you define regions. **EX:** A region could be defined as a state (i.e., Florida) or a part of the United States (i.e., Northeastern US). **Note:** There is an optional business rule named **Update Template From Sales Region** which sets a workspace template for associated Client Master client when the **Sales Region** field value is updated. The business rule checks the sales region and metadata specified on the **SalesRegionMetadata** dataform. If the sales region is selected and the metadata points to a different workspace than the one currently in use, the system will update the workspace template. The template change updates the users, security, and dataforms associated with the workspace to match that of the new template. If the template specified in the metadata is not different, or no template is configured in the Sales Region metadata, template and workspace configuration will not change
Broker Submitted	Indicates that the client prospect was obtained and submitted by an external intermediary, not an internal sales representative.
Primary Broker	A Primary Broker is the PEO Broker. This is an intermediary who specializes in connecting businesses with PEOs. The **Primary Broker** is added to ClientSpace as an organization record. Then, the Primary Agents are added as contacts to this organization record. Select a **Primary Broker** here and then select the **Primary Agent** (see below) associated with the selected broker.
Primary Agent	Select the **Primary Agent** (i.e., broker representative) associated with the selected **Primary Broker** (see above).
Locked	Indicates whether an associated Request for Proposal (RFP) (i.e., initial pricing or repricing for existing clients) is locked to prevent further updates. The **Locked** checkbox is only displayed and set if RFP locking is configured and enabled in the ClientSpace Pricing module. This field is used in conjunction with **Lock Expiration Date**.

	Note: If a "Kill" workflow process is initiated on an RFP from the Pricing Console or Client Master record, the **Locked** checkbox is unchecked and the **Locked Expiration Date** is also cleared. The Client Master record and all associated underwriting approval records are set to a **Status** of "Dead". (The **Status** field is typically located in the Workflow Information fieldset). All associated underwriting approval records are marked Inactive (i.e., the **Active** checkbox is cleared) and the **Audit** field of each underwriting approval record is updated with the status change details. See PEO underwriting approval process.
Lock Expiration Date	The **Lock Expiration Date** is set based on the configured RFP lock duration. **Note:** The **Locked** and **Lock Expiration Date** fields are for use with the ClientSpace Pricing module only.

Contract Information

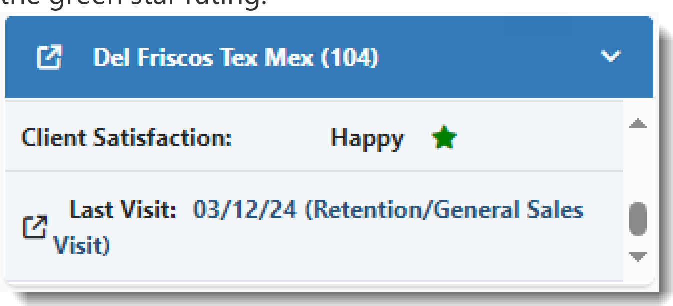
PEO ID	The **PEO ID** is only used if a client has a multi-tenant environment (i.e., multiple PrismHR databases connected to a single ClientSpace installation.) The PEO is secondary ID representing the instance of a client's PrismHR database.
Legal Entity	In the PEO space, the legal entity is the registered business entity of your client in the PEO co-relationship and is tied to paying federal taxes as well as unemployment filing. **Note:** If you use the Pricing Console and you do not identify a legal entity on the Client Master record, ClientSpace use the default legal entity associated with the Contract Type for pricing.
Client Number	The **Client Number** is a primary ID representing the instance of a client's PrismHR database. **Note:** In a multi-tenant environment, the **Client Number** may not be unique for all PrismHR database installations being accessed via a single instance of ClientSpace, the **Client Number** is combined with the **PEO ID** to ensure a unique identifier called the **Import ID**. The **Import ID** ensures that ClientSpace logs into the correct PrismHR database instance for imports and exports.
Contract Type	A classification describing the contract. **EX:** PEO, ASO, HRO, Staffing, etc. **Contract Type** is selected from a customizable drop down list.
Pay Frequency	How often the client pays its employees. **EX:** Weekly, Bi-Weekly, Monthly, etc.

Contract Effective Date	Date the contract became effective.
Date of First Payroll	Date of first payroll run by the client after entering the co-employment relationship.
Tax Exempt	Checkbox used to identify whether the client is recognized by the IRS as tax-exempt status based on an allowed organization type such as a church, nonprofit hospital or labor union, humane society, art museum, etc.
Signed Contract	An upload field used to attached the signed contract.
Payroll System	Used to identify the Payroll system that the client uses. **EX:** PrismHR, Summit, etc. **Payroll System** is selected from a customizable drop down list.
Contract Remarks	Used to add important notes or comments about the contract.

Client Situation

<table>
<tr>
<td>Satisfaction Level</td>
<td>

Select a customer satisfaction level from a drop down list. The display value is customizable and links back to a three-star "customer temperature" rating system that is used to populate the **Client Satisfaction** field of in the Client Info widget. In the example below, a display value of Happy has been associated with the green star rating:



Conventionally, a green star rating is used to indicate a very satisfied to satisfied customer, while a yellow or gold star indicates a moderately satisfied to neutral customer and a red star indicates a dissatisfied customer in need of attention. However, these colors can be customized in the Client Satisfaction lookup configuration.

Note:

- One way to ensure that the rating reflects the most up-to-date snapshot of client satisfaction is to use our Client Visits feature and update this field

</td>
</tr>
</table>

	each time a client visit occurs so that the rating coincides with the last visit. The **Last Visit** date (if entered) also displays in the Client Info widget as shown in the example above. • Please note that there is a similar **Client Temperature** field located on the Client Visit form that uses the same three-star system but it does not populate the Client Info widget.
Alert Notes	The Client Alert widget displays text entered in the **Client Alerts** field of the Client Master dataform as a banner at the top of the Client Master Dataform.
Alert Updated By	System-generated user stamp that occurs on **Apply** or **Save**. Indicates the username of the individual who entered the alert.
Alert Updated Date	System-generated date stamp that occurs on **Apply** or **Save**. Indicate the time alert was applied.

OSHA

Generate OSHA 300A ITA	When checked, the OSHA 300A ITA merge is run when the yearly scheduled process **Generate OSHA Forms** runs. The resulting file attachment is added to the OSHA Forms dataform of the associated workspace in the **OSHA 300A ITA** field.
Generate OSHA 300/301 ITS	When checked, the OSHA 300/301 ITA merge is run when the yearly scheduled process **Generate OSHA Forms** runs. The resulting file attachment is added to the OSHA Forms dataform of the associated workspace in the **OSHA 300/301 ITA** field.

Workflow Information

Depending on your configuration, some of these field such as **Status**, date fields and **Kill Reason** may appear dimmed and unavailable. This typically indicates that the field data was imported from another application, such as Salesforce, via an API or is part of an automatic sales workflow.

Status	The client status. **EX:** Client, Pending Termination, Terminated, etc.
Status Date	The date the current **Status** was applied.
Create Date	The date the underwriting approval record was created.
Submit Date	The date the underwriting approval record was submitted.
Underwriting	The date the underwriting approval record was marked Approved.

Approval Date	
Implementation Start Date	The date client onboarding began.
Activation Date	Date of ClientSpace activation.
Pricing Renewal Date	Date the pricing renewal batch was created.
Kill Reason	If a "Kill" workflow process was initiated on an RFP from the Pricing Console or Client Master record, you can specify a reason for RFP termination by selecting from a custom list of options here. This value may also import from another application, such as Salesforce, via an API.
Sync with PrismHR (Import)	This initiates a manual, one-time only sync from PrismHR. When checked, a scheduled process imports the client's Employee, Employment, Location, and Client Team data from PrismHR. This option is frequently used to import client data that failed to import due to errors that occurred during the initial import. Once the one-time sync is complete, the flag is automatically unchecked by the system. **Note:** The client must have a **Client Number** to use this feature. See PrismHR to ClientSpace Client sync.

Company Other Info Tab Fields

Recurring Client Visit Schedule

These fields are only displayed if your company is configured to use the Recurring Client Visits feature. With recurring visit, when you mark a visit Completed, a new planned visit is automatically set up on the Client Visit dashboard. This feature requires configuration. For more information, see Configuring Recurring Visits.

Visit fields (field labels may vary)	The names of the visit fields displayed here can vary depending on configuration. You may have one general visit field or you may have multiple. **EX:** HR General Visit, WC Safety Visit, etc. This selection in this field informs the system when to schedule the next planned visit. Using the example visit types listed above, if you select Annually for the **HR General Visit** category, once an HR General Visit is marked complete, a planned visit is added to the Client Visit dashboard for next year. Similarly, if you select Quarterly for the **WC Safety Visit** category, similarly, once a visit is marked

	complete in the current quarter, a new planned visit is added for the next quarter.

Client Master and Multi-Tenancy

The Client Master is one of several records where the **Import ID**, a unique identifier is stored. In multi-tenant environments, the **ImportID** is comprised of the **PEO ID** and **Client Number**. (In environments that are not multi-tenant, the **Import ID** is the **Client Number**). The **Import ID** is used by the PrismHR Import API.

See Multi-tenancy Environments in ClientSpace.

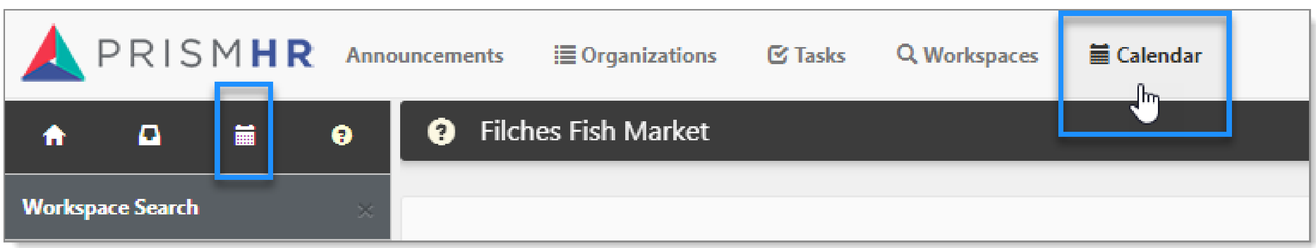
Chapter 8

Using the ClientSpace Calendar

ClientSpace provides an integrated calendaring system that is available from both within and outside a workspace. The ClientSpace calendar can be synced with external Gmail or Outlook calendar events through profile settings. When you are synced with the external calendar events, you can see the availability of all attendees at a glance to aid in scheduling. You can also view the external calendar event details to include the subject of the meeting and attendees.

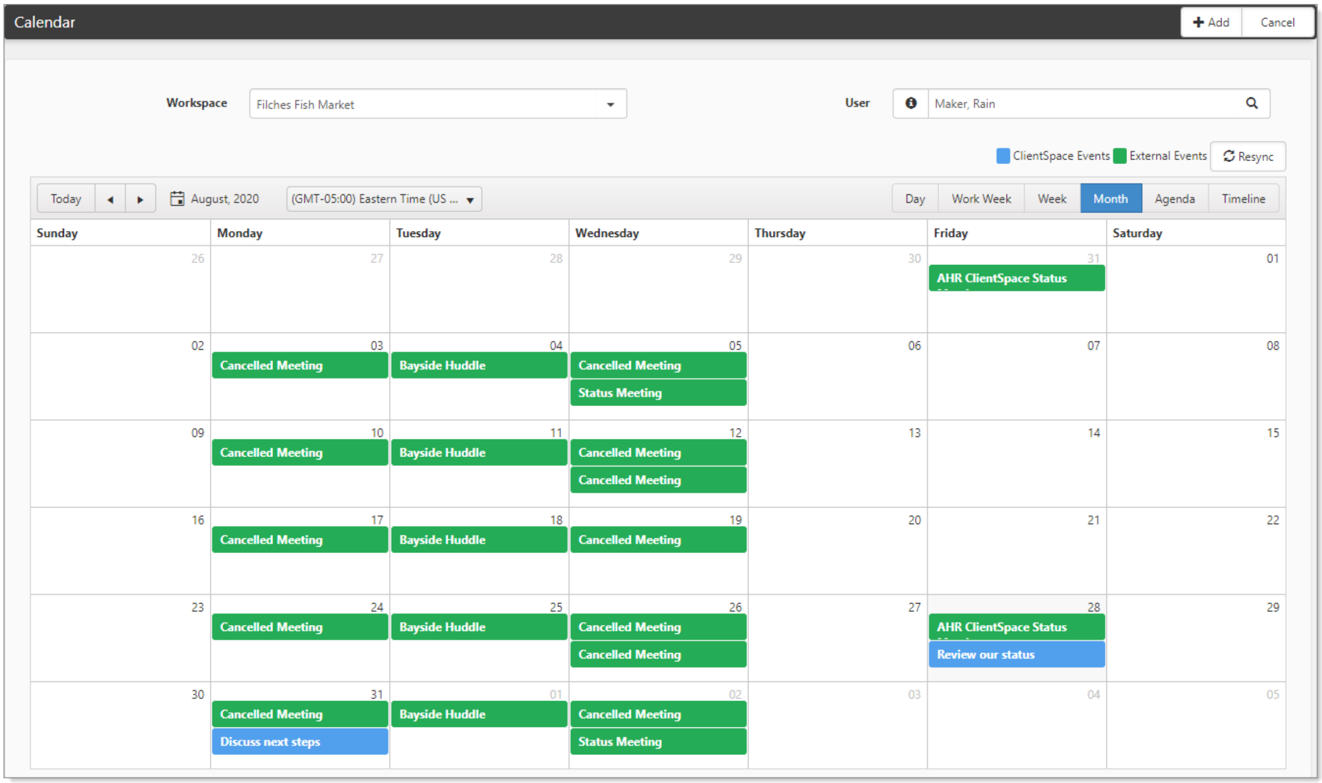
Viewing the ClientSpace Calendar

The ClientSpace Calendar is accessible from the modules bar and the Workspace menu.



To open the calendar module:

1. From the modules bar, click **Calendar**.
   The Calendar module opens. By default, the calendar events for the week display and reflect your scheduled events. Blue indicates ClientSpace events, and the green represents your external calendar events (Gmail or Outlook).



To filter the calendar:

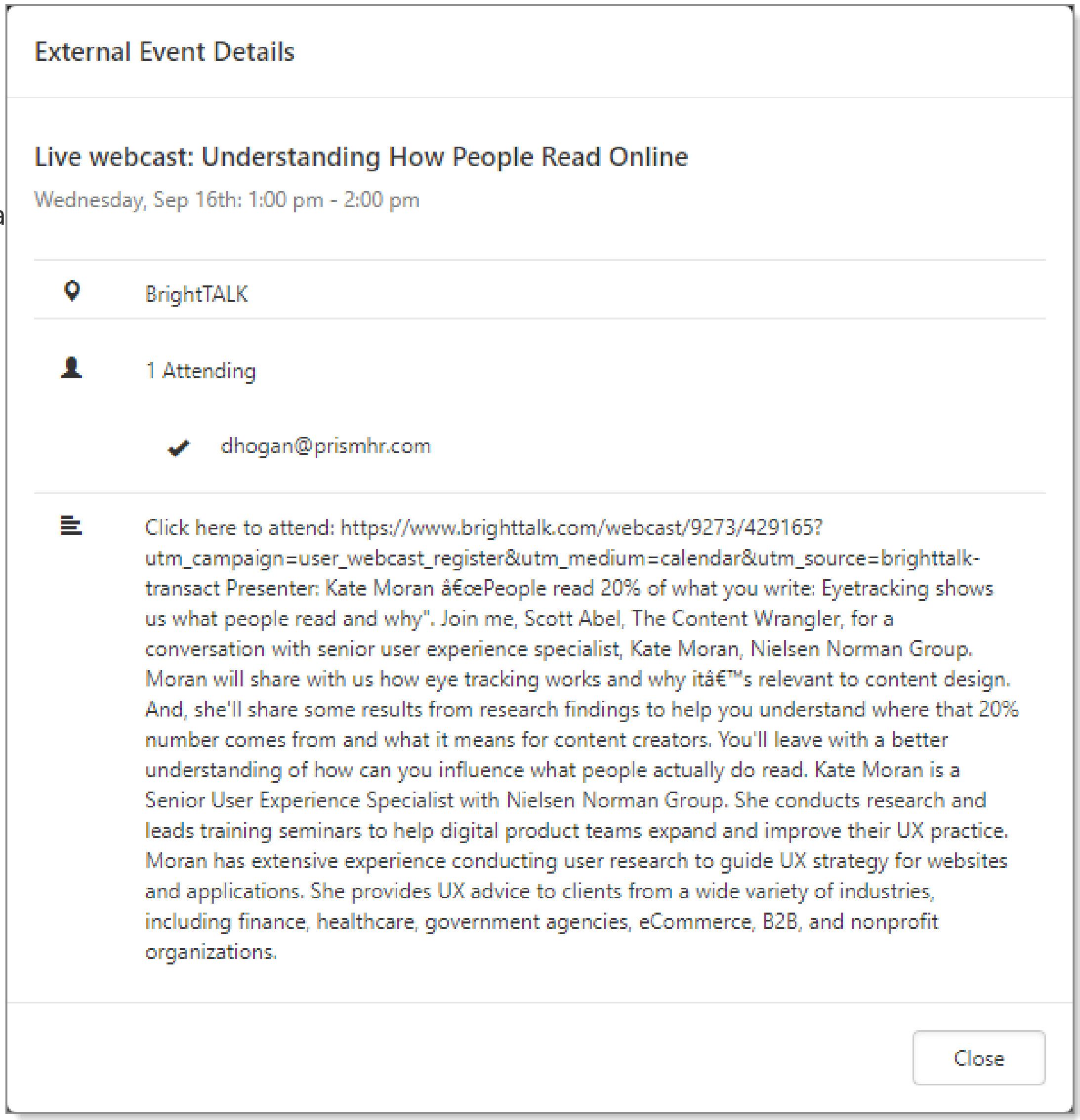
2. You can filter the calendar in many formats.

Workspace	Select a workspace to filter events to only those attached to that workspace. The Workspace name typically matches that of the Organization.
User	The default user is you, the logged-in user. You can select other users to see events for all. When multiple users are selected, hover over the info bubble to see the list. **To view events for you and additional users:** 1. Click (**Select Users**). The Select Users search list opens. 2. In **Quick Search**, you can type the first or last name of a User or Contact and press **Enter**. Optionally, click **More** and in First Name or Last Name, type the user name, and click **Search**.

	3. For the targeted users, click the **Select** option. You can select multiple users. 4. Click **Ok**. The events for all selected users are displayed.
Event indicator colors	• **Blue**: Events that were created and are maintained in ClientSpace. • **Green**: External calendar events based on the External Calendar URL on the related user profile, such as Gmail or Outlook.
Date criteria	Select the date range and time zone for display.
Calendar format	Select how you want to view this calendar: • **Day**: Show only those events for today. • **Work Week**: Based on the configured workweek in application settings, commonly Monday through Friday 7:00 am – 7:00 pm. • **Month**: Show events for the current month. • **Agenda**: Provides a 7-day synopsis of your meeting schedule. • **Timeline**: A daily view that shows a horizontal timeline for a single day and the associated calendar events from start to finish.

To view the details of an external calendar event:

3. From your open ClientSpace calendar, double-click a green event. These are events associated with the external mailbox of the logged in user.
   The External Event Details dialog box opens.



4. When viewing an external calendar event for the logged-in user, the following details are presented:
   - Subject, date, and time.
   - Location.
     - For events with no set location, *No Location Defined* is displayed.
   - Email addresses of the invitees.
     - When there are more than 10 attendees, the user list is collapsed.
     - The details indicate how many are attending, declined, and awaiting reply.

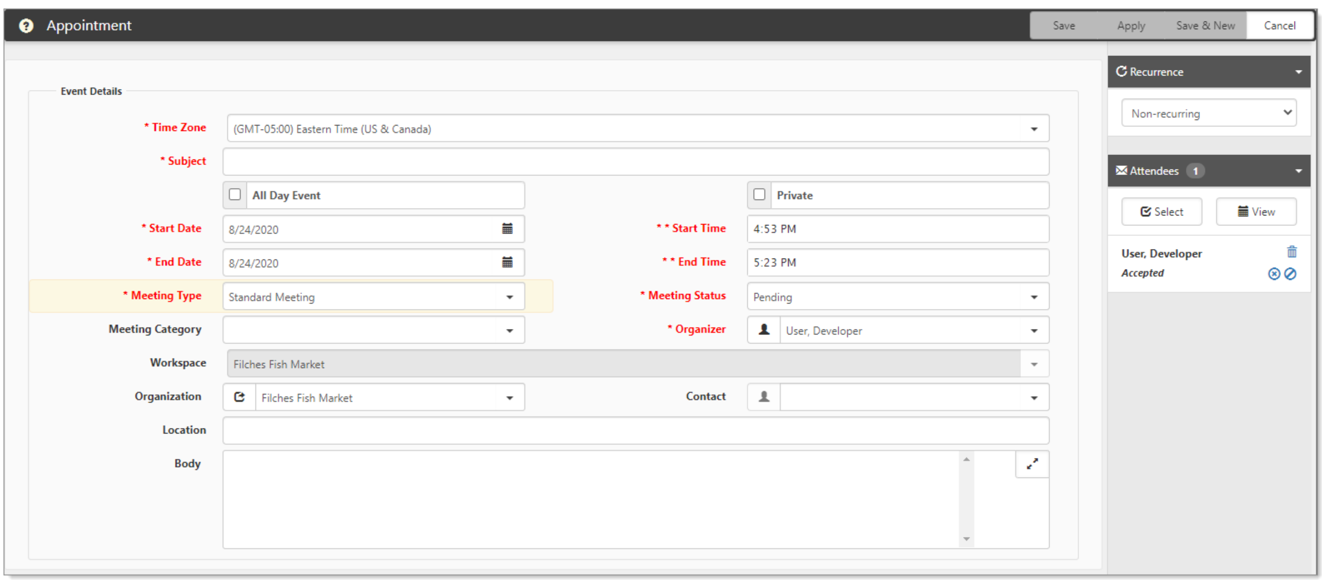
- For events with no defined attendees, *No Attendees Defined* is displayed.
- Notes follow the attendee list.
  - For events with no notes, *No Description Defined* is displayed.

5. Click **Close**.

Using a calendar within a workspace

To use a calendar within a workspace:

1. Open a workspace.
2. In the **Action Center**, select (**View Calendar**).
   The Calendar module opens for the selected workspace. Calendar items created in this way are automatically created in the current workspace.
3. Click **Add**.
   The Appointment form opens.

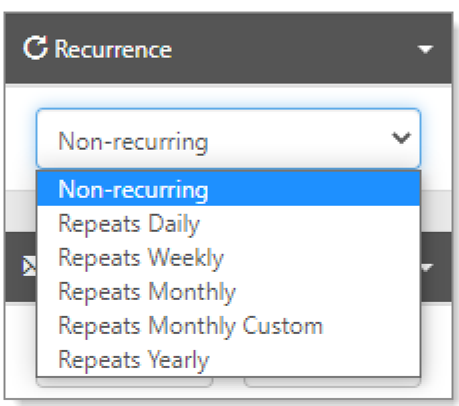


4. The Appointment form is where you create the new calendar event. The example and following list guide you through the form.

Actions	Save a new calendar event or Apply changes to an existing one.
Recurrence	Calendar items provide the option to create recurring calendar events. These events can be scheduled to occur regularly and are automatically generated by a scheduled process after configured. The events can be scheduled to occur daily, weekly, monthly, or yearly. For more details on Recurrence, see Recurring events.
Time Zone	Control the default time zone of this calendar events. 8:00 am meetings set up in the Pacific time zone display as 11: 00 am for someone whose default time zone is Eastern.
All Day Event	Sets the start time of the calendar item to 12: 00 am and the end time to 12:00 pm.
Private	When this option is selected, the calendar event is only visible to invited attendees.
Organization	Select an organization to be associated with this event. Contacts related to the selected Org display in the Attendees list.
Contact	Select a contact from the designated Organization.
Attendees	Whom would you like to invite to this calendar event? Select and view their availability.

5. Click **Apply**.

Recurring events

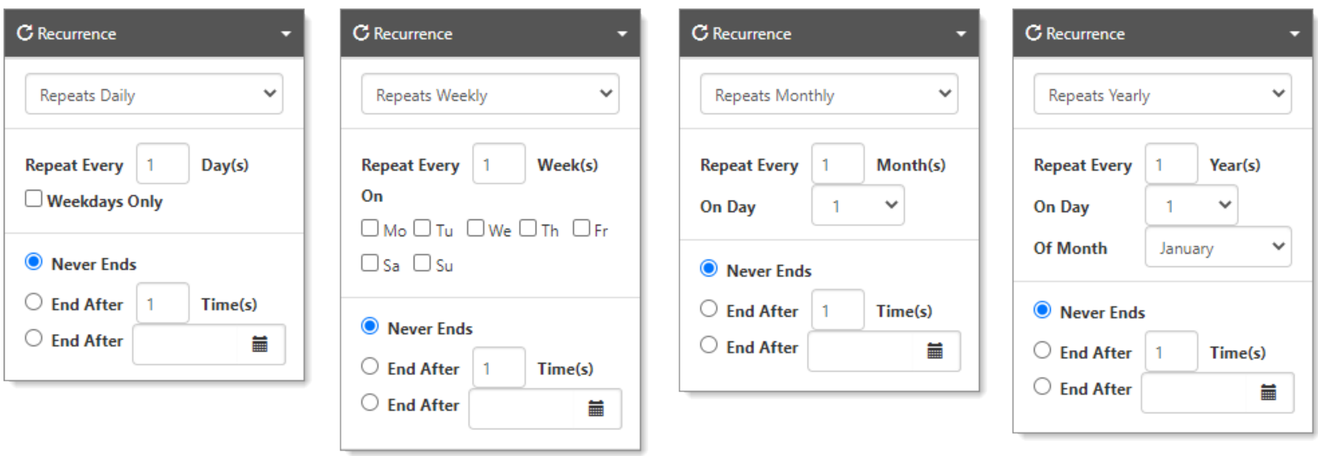


Use Recurrence to control the frequency of recurring events, located in the Action Center. The default setting is Non-recurring. To customize a recurring monthly event, see Repeats Monthly Custom.

To add recurrence controls:

1. In the **Recurrence** pane, click **Non-recurring**.
   The frequency list displays.
2. Select a frequency from the list:
   - Repeats Daily
   - Repeats Weekly
   - Repeats Monthly
   - Repeats Monthly Custom
   - Repeats Yearly

   When you select a frequency, more options appear: Repeats Daily, Repeats Weekly, Repeats Monthly, Repeats Monthly Custom, and Repeats Yearly.



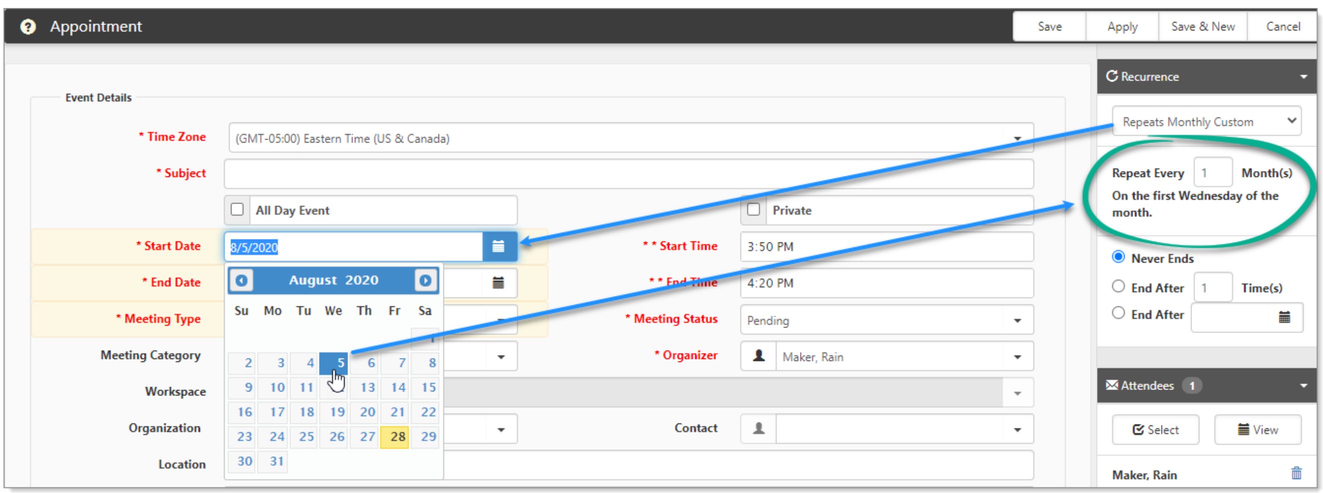
3. How often would you like this event to repeat?
   - For example, if you select **Weekly** for the cycle, then the frequency choice would be **Repeat Every *n* Weeks On** Mo, Tu, We, Th, Fr, Sa, Su. Where *n* represents how many weeks to repeat.
   - **Repeating on**: Select the days of the Week/Month/Year you would like the appointment to repeat. Select as many days as applies.
4. Select how long you would like the event to repeat based on the number of occurrences or end date:
   - **Never Ends**
   - **End After *n* Times**

- **End After *date***

Repeats Monthly Custom

Repeats Monthly Custom requires additional selections based on Start Date.

1. In Recurrence, select **Repeats Monthly Custom**.
   More options appear. The default presents the frequency to repeat every month, starting with your current day of the week and week of the month.
2. In **Start Date**, use the date picker to select a day of the week and the week of the month.
   In the date picker, select the targeted day of the week to coincide with your preferred week of the month. For example, if you want the recurrence on the first Wednesday of the month, then select the day as show in the following example. When you select a day and week, the display changes in the Recurrence pane.



3. Complete the option to specify when the recurrence ends.
4. Click **Save**.

Inviting attendees

The Attendees selector is where you add invitees to the calendar, as well as track the status of the invite.

To add or remove invitees:

1. From an open appointment, expand **Attendees**.
   The badge counter displays the number of current calendar event invitees. Any attendees that

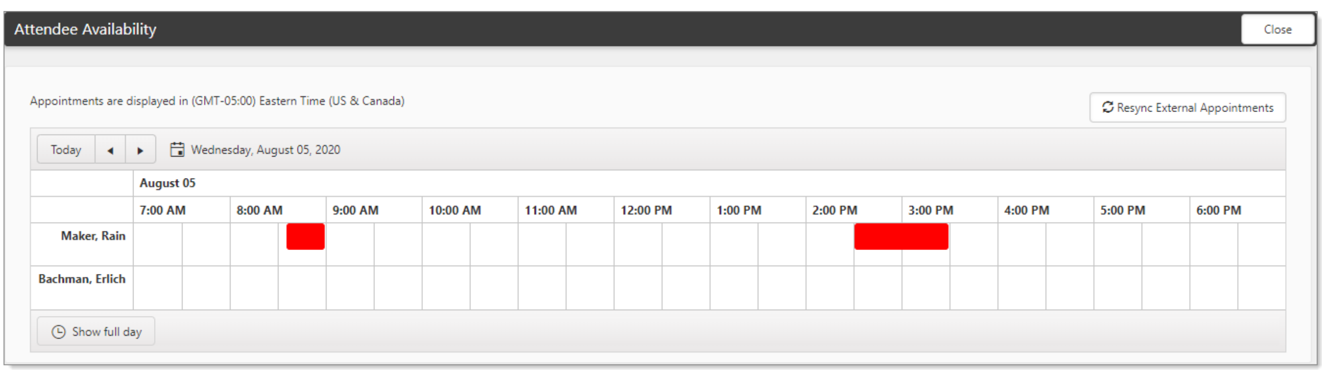
have already been selected are displayed in the Attendees panel. The status of the invitation is also noted: Accepted, Tentative, Declined.

2. You can also control the attendee status from here:
   - (**Remove user**)
   - (**Accept**)
   - (**Decline**)
   - (**Tentative**)
3. Click **Select**.
   The Select Attendees list is displayed. The list is filtered based on the **Include Contacts From***Workspace name*. The selected workspace filters available users on this list.
4. Select a user from the list and select the **Select** option. Alternatively, double-click the entry. You can sort the list.
5. Click **Ok** to add the attendees to the event.
   The newly selected user is now displayed in the Attendees list.
6. Click **Apply**.

After you have selected your attendees, you can get a snapshot of their calendar availability using **View** in the Attendees panel of the calendar detail.

To view attendee availability:

1. Expand the Attendees panel and click **View**.
   The Attendee Availability calendar displays.



Resync External Appointments	Resync the calendar appointments for all selected attendees.
Date	Displays the date of the calendar event. Click to display the

	date picker and change the calendar date.
Availability list	Displays an overview of the attendee's other calendar events for that day. • Events in RED are booked dates (accepted). These times should be avoided. • Events in YELLOW are tentative to the attendee and could potentially be re-scheduled.
Show full day / Show business hours	Click to toggle the view. Changes the availability view to include or exclude non-business days and hours.

2. Click **Close** when ready.

Adding external calendar events

ClientSpace allows you to review an external calendar (such as an Outlook or Gmail calendar) when reviewing attendee availability for a calendar event. This means non-system events scheduled in your external work calendar show as busy in your system calendar.

This topic describes how to configure this for the two most popular email calendar options: Gmail and Microsoft Outlook. While theoretically, this functionality could work with any calendaring system that provides ICS accessibility, it has been designed and tested to work with these two systems.

Gmail configuration

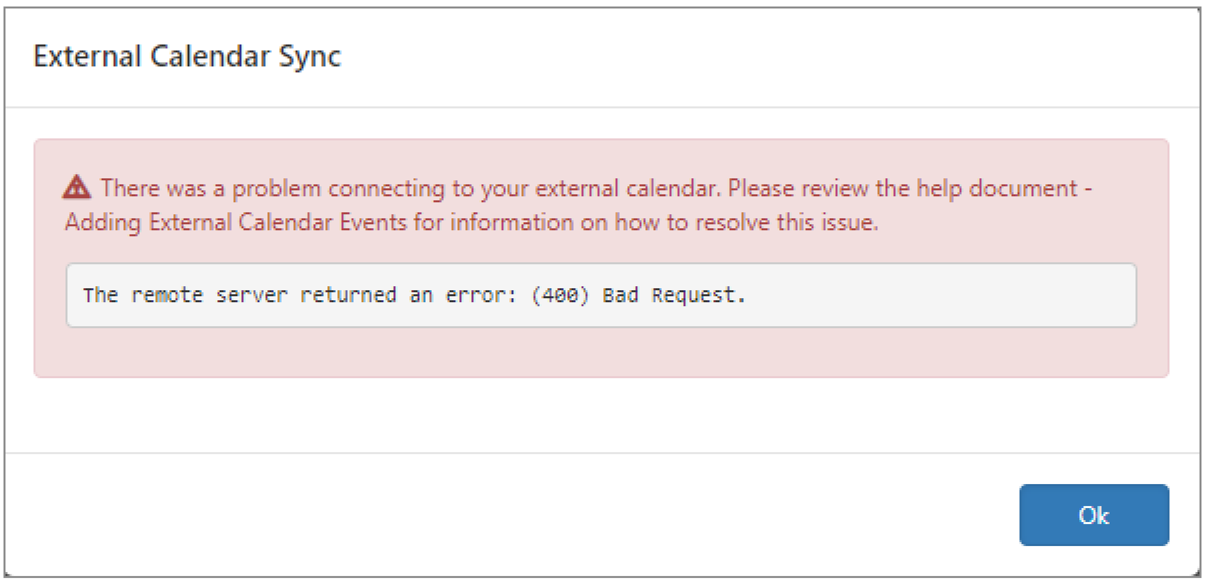
For a Gmail calendar, you must copy the link for the Secret address URL.

To add visibility into a Gmail calendar:

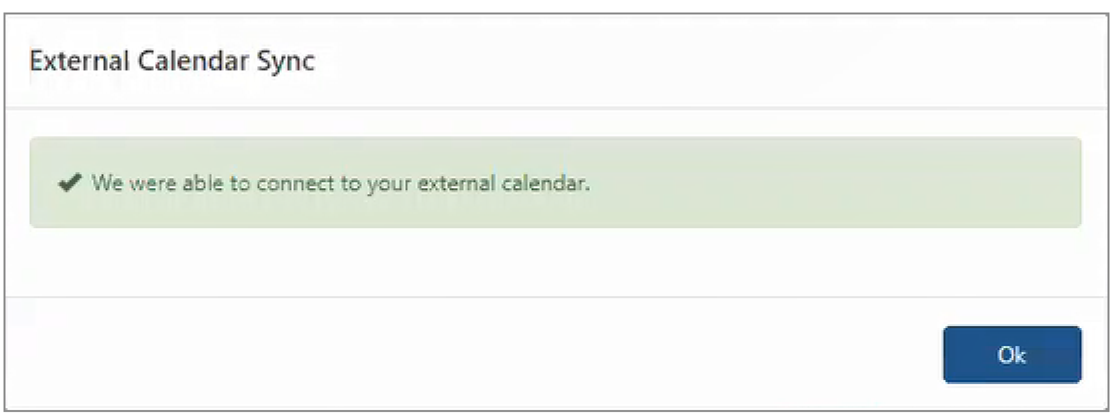
1. Open your Google Calendar.
2. Click **Settings menu** > **Settings**.
3. In **Settings for my calendars**, select the targeted calendar.
   The Calendar settings display.
4. In **Integrate calendar**, locate **Secret address in iCal format**.
5. Right-click the URL and select **Copy**.

In ClientSpace:

1. On the module bar, click **username** > **My Profile**.
   The User Details form opens.
2. In **External Calendar URL**, paste the URL that you just copied.
3. Click the **Sync** button  (located on the right side of the **External Calendar URL** field) to test the URL.
   - If a message displays that indicates that the test was unsuccessful, repeat the Google Calendar procedure again to ensure that the complete URL copied successfully, then repeat this ClientSpace procedure.



   - If a message displays that indicates a successful test, continue to Step 4.



4. Click **Save**.

When you select attendee availability on a ClientSpace calendar event, the system now checks to see the last time you refreshed your Gmail calendar. If it has been more than 30 minutes, the system retrieves all active calendar events for the next three months and displays them in the Free / Busy area.

Outlook configuration

For an Outlook calendar, you must export the iCalendar ICS URL.

To add visibility into an Outlook calendar:

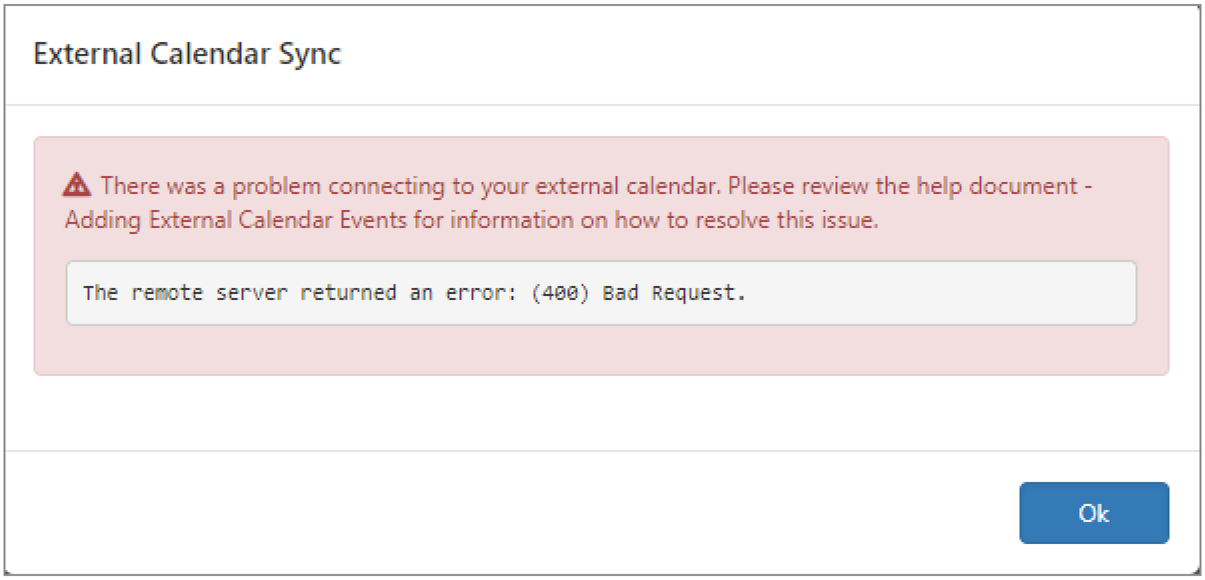
Note: The location of some settings may vary depending on your version of Outlook. In this procedure, we list the steps for the web access version of Outlook.

In Outlook Web Access:

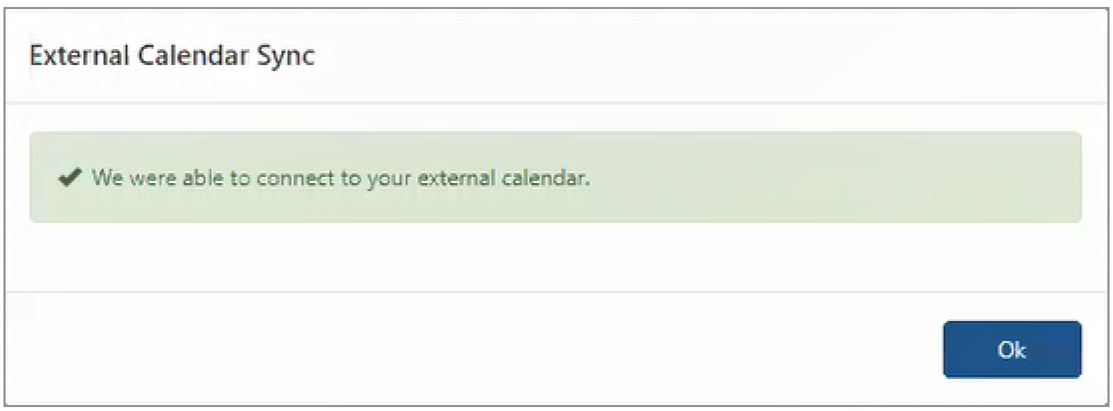
1. Open your Outlook calendar.
2. Click **Settings menu** > **View All Outlook Settings**.
   The Shared calendars window displays.
3. Select **Shared Calendars**.
4. In the "Publish a calendar" section, click the down arrow in the **Select a calendar** field and pick the calendar you want to share.
5. Then, click the down arrow in the **Select permissions** field and select the desired option:
   - Can view when I'm busy
   - Can view all details
6. Click the **Publish** button.
   The ICS URL is generated and displays on the screen.
7. Right-click the **ICS URL** entry and select **Copy Shortcut**.

In ClientSpace:

1. On the module bar, click **username** > **My Profile**.
   The User Details form opens.
2. In **External Calendar URL**, paste the URL that you just copied.
3. Click the **Sync** button (located on the right side of the **External Calendar URL** field) to test the URL.
   - If a message displays that indicates that the test was unsuccessful, repeat the Outlook Calendar procedure again to ensure that the complete URL copied successfully, then repeat this ClientSpace procedure.



- If a message displays that indicates a successful test, continue to Step 4.



4. Click **Save**.

When you select attendee availability on a ClientSpace calendar event, the system checks to see the last time you refreshed your Gmail calendar. If it has been more than 30 minutes, the system retrieves all active calendar events for the next three months and displays them in the Free / Busy area.

Note: External Events are visible in the system calendar and Free/Busy management, but cannot be opened or edited.

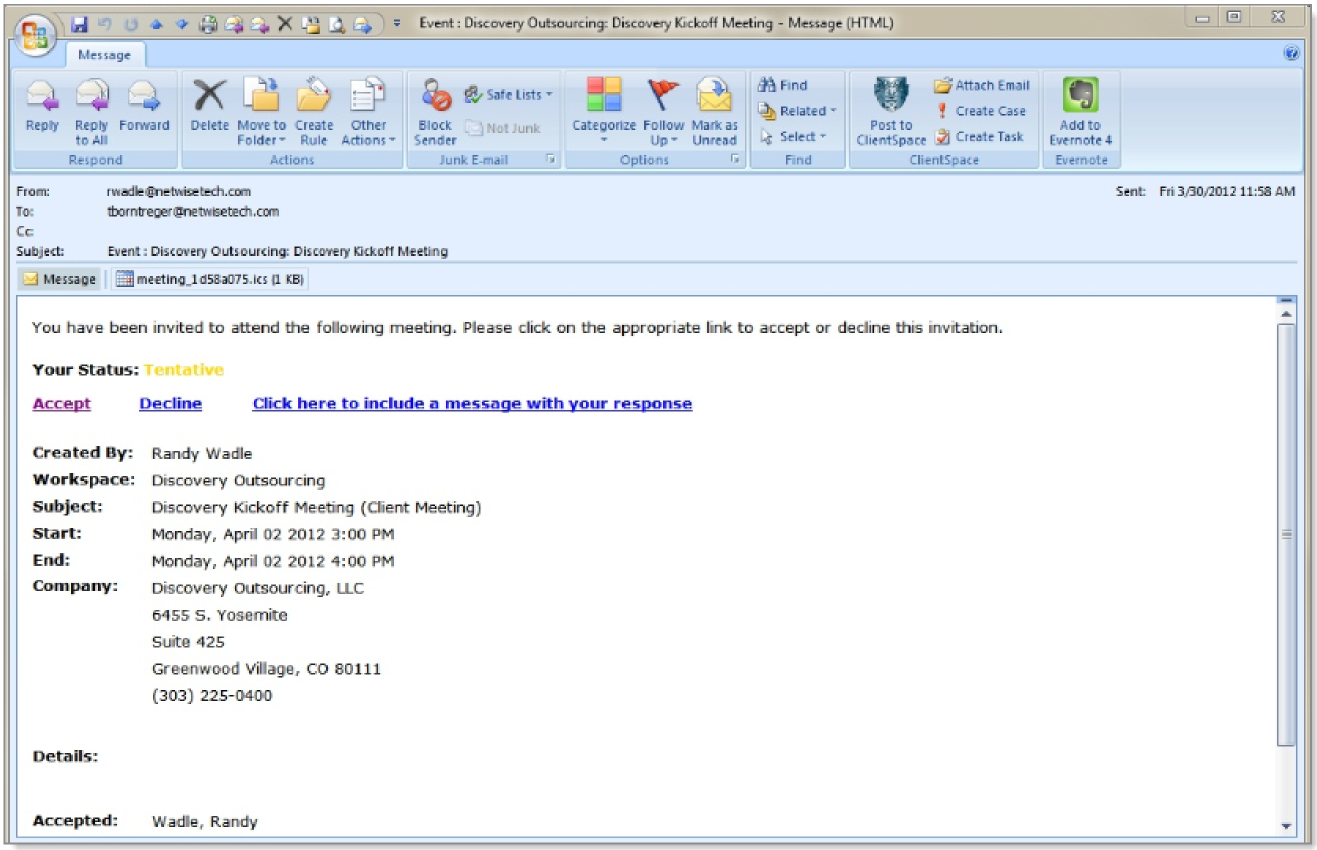
 View the video External availability calendar sync.

Adding a ClientSpace event to Outlook

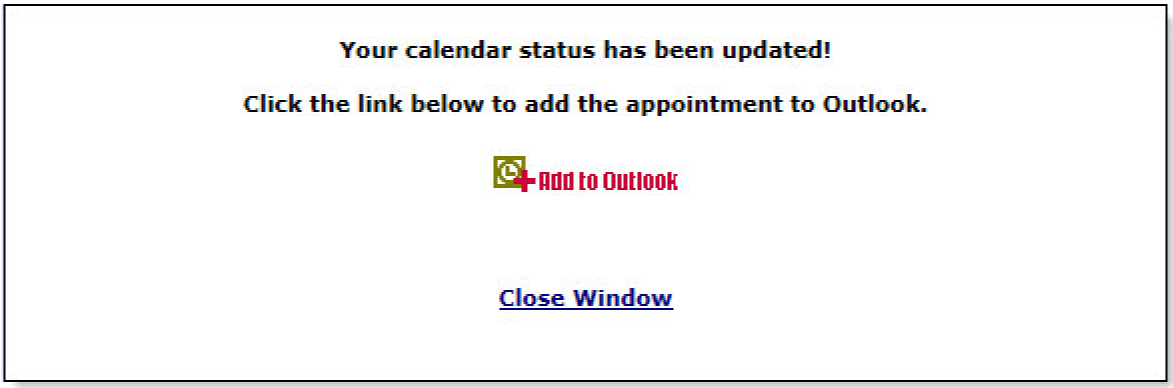
ClientSpace has built-in calendar functionality that automatically sends an invite to calendar attendees. Here is how you add the calendar events to your Outlook Calendar.

To add a ClientSpace event to Outlook:

1. In Outlook, open a meeting invite.



2. Click **Accept** or **Decline** to send your response.
   After you click Accept, a new window opens prompting you to add the event to Outlook.



3. Click **Add to Outlook**.
4. Next, on the browser notification bar, click **Open**.

A new Outlook Appointment opens.

5. Click **Save & Close** to add the appointment to your Outlook Calendar.

Determining the Calendar Events Workspace

ClientSpace allows for multiple CRM related workspaces. This configuration is beneficial if a client wants to separate their sales group into multiple territories or divisions and it is necessary to keep their Organizations, Contacts, Calendar Events, and Activities separated.

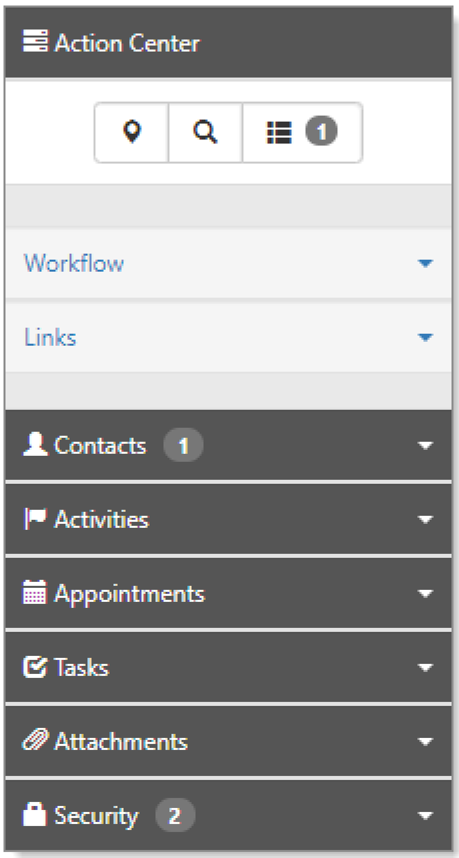
The order of operations to determine which Workspace the calendar event is attached, is as follows:

1. ClientSpace checks to see if there is only one Client Workspace for this Org. If so, use it. If there are more than one, it prompts the user to select a workspace.
2. If there are Client Workspaces for this Org, it then checks if there is only one workspace that is marked as CRM Related (on the Workspace Settings tab). If so, use it.
3. If there are CRM Related workspaces, it then falls back to what's configured as the Sales Workspace App Setting.

Chapter 9

Action Center

The Action Center is your portal to all links, actions, and forms, based on the current active work. The Action Center is a menu displayed in a pane adjacent to the currently displayed record as panels that you can collapse and expand. The Action Center toolbar icons change depending on the current work item (see Common actions).



Workflow links are action links that cause a result; they enable you to move a process along from beginning to end, such as advancing an Organization from prospect to client.

Home Pages presents a selectable list of home page layouts. The available home page layouts are based on priority, conditions, and security settings. This is available only on the Home page. See Home Page and Home Page Widgets.

Contacts is where you add the Organization contacts – the people that you work with during the onboarding process and beyond. See Contacts.

Activities reflect your communication with the prospect or client: **Emails**, **Phone Call**, **Follow Up**, and **Note**. See Activities.

Appointments are where you record meetings to include the date, time, type, status, and location. See Appointments.

Tasks are how you track individual work items that need to be completed, such as onboarding a client. Tasks are configurable assignment items with an Owner and Assigned To person and have defined start and end dates. See Cases and Tasks.

Attachments allow you to attach files to the record, such as communication in other formats. See Attachments.

Security shows users and roles with access to the record. From this mini-panel, you can administer access by adding or removing roles and controlling access: View, Edit, and View List.

Common actions

The Action Center provides a series of common actions that you can perform from within a workspace.

Org provides a quick jump to the Organization associated with the workspace.

Calendar opens a default calendar, prefiltered for the workspace.

Favorite adds the workspace to your favorites list. Selecting this icon is the same as selecting the Favorite option from the homepage or workspaces dashboard. When selected as a favorite, the heart indicator turns red.

Jump takes you from one client workspace to another. Jump opens the new client as another item in your work items menu for effortless multitasking.

Reload refreshes the data on the current workspace landing page.

Dataform landing page icons

Jump action allows you jump to the workspace associated with this form.

Audit Trail: Open the Audit Trail dashboard for the dataform with the list of actions on the dataform record. More configuration may be required to use this function

Add this Dataform to your Watch List allows you to pin the form and open it from a watch list widget.

Reload action refreshes the dataform.

Copy link to clipboard copies the current URL into your Windows clipboard.

Show Lookups displays lookups related to the selected dataform.

Dataform Properties opens the Dataform Properties dashboard as a new work item.

External Source Linking opens the External Source Linking dashboard. See External source linking.

	Workflow History shows the history attached to a dataform created through a Workflow Channel.

Task landing page icons

	Jump action allows you jump to the workspace associated with this form.
	Audit Trail: Open the Audit Trail dashboard for the dataform with the list of actions on the dataform record. More configuration may be required to use this function
	Reload action refreshes the dataform.
	Configure Recurrence See Configuring recurring tasks.
	Copy link to clipboard copies the current URL into your Windows clipboard.
	Workflow History shows the history attached to a task created through a Workflow Channel.

Workspace landing page icons

	Organization Detail action opens the Organization associated with the workspace.
	Calendar action opens a calendar to add new events.
	Favorite action adds the active workspace to your Favorite workspaces.
	Jump action allows you to jump to a different workspace.
	Reload action refreshes the workspace.
	Copy link to clipboard copies the current URL into your Windows clipboard.
	Dataforms opens the Workspace Dataforms dashboard.
	Settings opens the Workspace Settings for the selected workspace.
	Users opens the Workspace Users dashboard.

Form level icons

	Go to Workspace opens the workspace associated with this form.
	Add this Dataform to your Watch List allows you to pin the form and open it from a watch list widget.
	Map It is under organizations and contacts. When you click this icon, the client address on the form is copied and searched using Google Maps.

Action Center panels

The panels change dynamically based on the forms that are active in your work center.

- **Workflow** denotes moving a process through the system. When you click the Workflow link, it updates the status on the active form.
- **Links** provide related information in the system.
- **Attachments** allow you to upload a file to the case. Browse to a file in your system and attach it to the form.
- **Subscribers** are the people notified about changes to the form.
- **Activities** record client contacts using email, phone, follow up calendar events, and notes. You can perform a full search to access more than 10 activities on a list.
- **Workflow Attachments** store file or link attachments created when a task or dataform is generated by a workflow item. These attachments are specific to the workflow that created the record.

Video

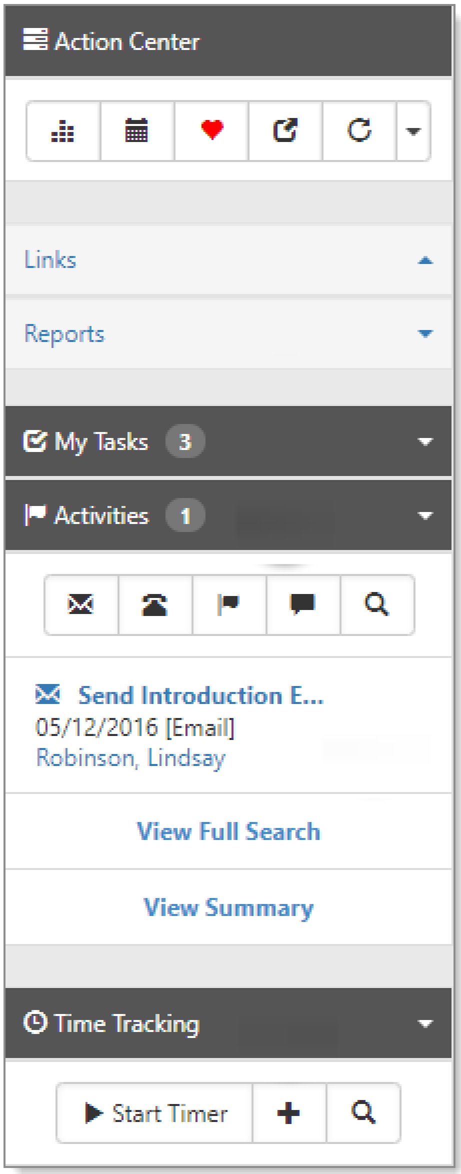
View the Action Center Overview.

Chapter 10

Action Items

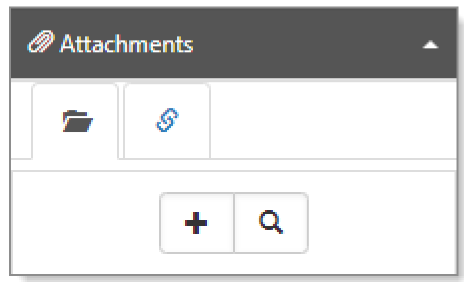
Action items are displayed in the Action Center and enable navigation to links, reports, notes, attachments, and time tracking items. The contents of the Action Center change based on the current active work object in the Work Center. For example, an open Organization has an Action Center that contains Contacts, Activities, Appointments, Tasks, Attachments, and Security. In contrast, a Workspace landing page may only contain Links, Reports, Tasks, and Activities.

Across the application, the Action Items work in the same way. These items are a series of collapsible objects such as Links, Reports, Tasks, Activities, and so on. The following image and numbered items describe the navigation.



- Action items are **Links**, **Reports**, **Tasks**, and **Activities**. You can collapse and expand the entries. Links are configured as pinned open and appear expanded by default when the Action Center is refreshed. Non-pinned links appear collapsed under a More indicator at the bottom of the links list. Your system administrator can configure Action Items to display conditionally so that certain items only display if the proper conditions are met.
- Action items that can have multiples, such as activities or tasks, display the current **count of active items** (if greater than 0) or display 0* to denote that there are no active items, with the asterisk signaling inactive items are available in the list. If no active or inactive items are available, there is no counter. Click + (Add) to start an Add dialog.
- **My Tasks** displays a top ten list of tasks associated with the current Active Work item in the Work Center where the Assigned To user of the task is the logged in user. To view inactive records, click **View Full Search**.
- Generally associated with organizations, activities are a **list** of **emails**, **calls**, **notes**, or **calendar events** associated with the client workspace. For more information on activities, watch the Activities Overview video.
- If **Time Tracking** is enabled for your user account, and the active Work Item in the Work Center has Time Tracking enabled as well, then the Time Tracking action bar is available, allowing you to start and stop new Time records as well as view and edit existing time tracking items. This item displays the 5 most recent time tracking items.

Chapter 11
Attachments



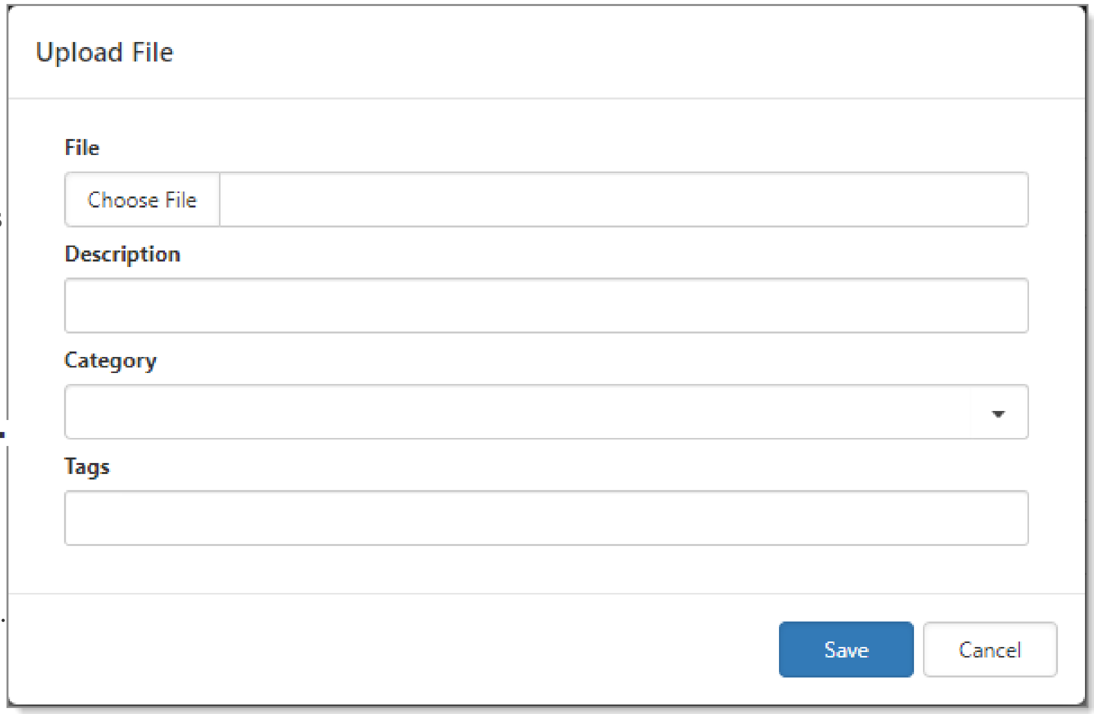
You can attach files to Organization records, the Client Master, Visits, Cases, Tasks, and Comp Claims – most anywhere you see the Attachments Action Center panel associated with any dataform or Org/Contact record. You can attach and link to files (such as Google docs and sheets) or a website. Attaching files is easy; drag files to the Attachments bar or use the upload procedure.

To attach a file using drag:

1. Open the file explorer on your computer and locate the targeted file.
2. In ClientSpace, open the targeted dataform.
3. From your file explorer, select and drag the files to the dataform **Attachments** bar. There is no need to expand the pane. You can select multiple files and drag them to the Attachments bar. You cannot upload additional files while a file upload is in progress.

The file is attached, with the counter incremented. If you try to upload a file extension that is not allowed, you receive an error message "You may not upload files with an extension of *.xxx*." To add accepted file types, see the topic, Adding accepted file types for file attachments.

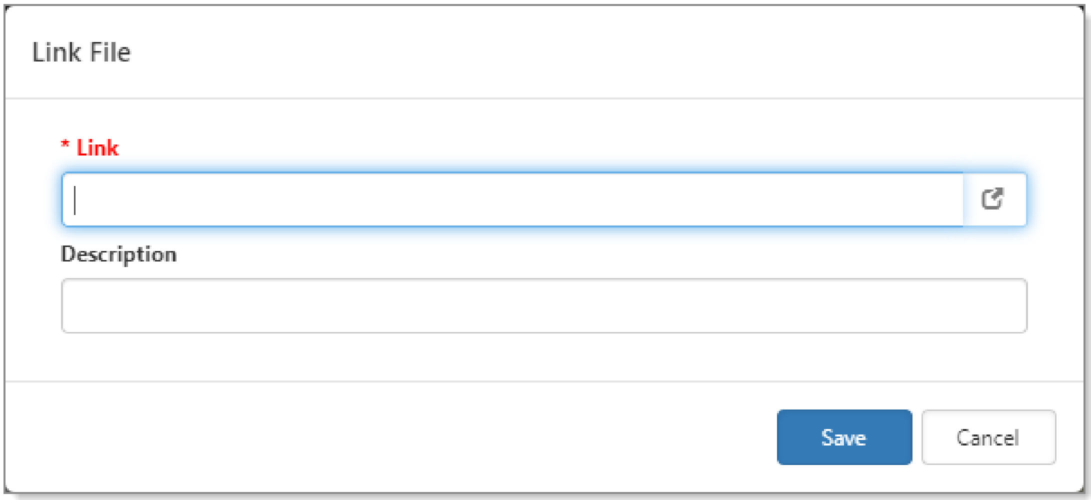
To attach a file using Upload File:



1. From the **Action Center**, expand **Attachments**.
2. Click (**Attach a file**). Upload File becomes available.
3. Click (**Upload File**). The Upload File dialog box opens.
4. Click **Choose File**. File Explorer opens.
5. Locate the file and click **Open**. The file name appears in File.
6. Click **Save**.

The uploaded file is now attached.

To link to a file or website:



1. From the **Action Center**, click **Attachments**.
2. Click (**Link**) and then ✚ (**Add a URL Link**). The Link File dialog box opens.
3. In **Link**, paste a link and then provide a **Description**.
4. Click **Save**.

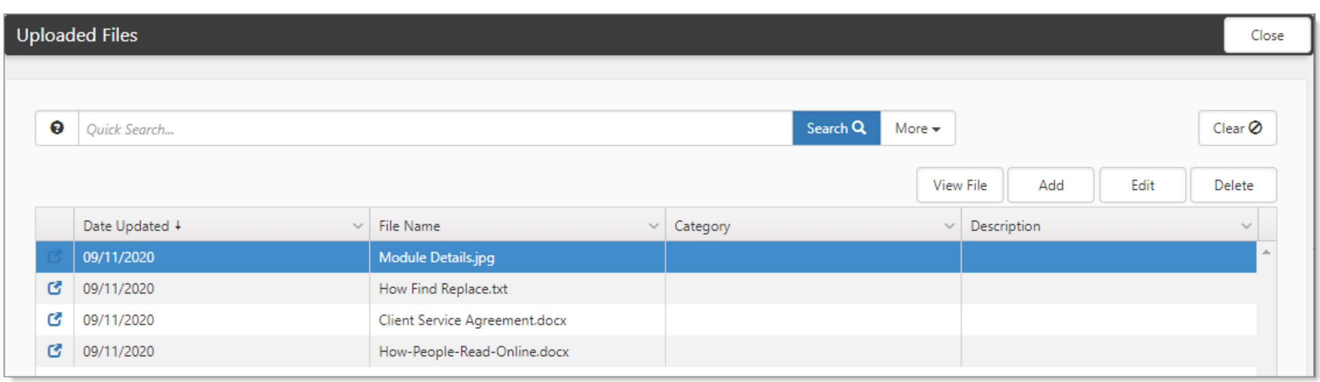
The linked document or URL is now available.

To delete attachments and links:

1. In the **Action Center**, expand **Attachments**.
2. Click (**Files**) or (**Link**).
3. Locate the item, and click (**Remove**).

To view all attachments:

1. In the **Action Center**, expand **Attachments** and click **View Full Search**.
   The Uploaded Files dashboard opens.



2. From here you can **View File**, **Add**, **Edit**, and **Delete** attachments.

For details on managing file versions, see the next topic Managing attachments.

Managing attachments

When managing attachments, you can upload new file versions and also change the primary file from within the version list. Files uploaded to ClientSpace as attachments or assigned to dataform fields can have a hierarchy of several files, all associated with a primary file. The primary file is considered the currently in-use file. Other files associated with the primary file are versions or versioned files. Versioned files can be updated to be the primary file (known as Pinning). This enables an historical record of file management activity. A logical version number is displayed next to each file name. The number is derived from the order in which associated files were uploaded to the system, with v1 as the earliest.

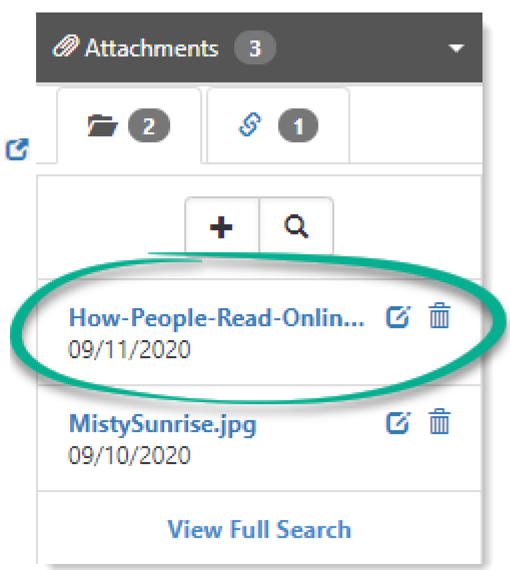
On Attachment lists or Dataform Fields, only the primary file is displayed. Using Upload File, you can manage versions. There is no technical limit to the number of files that can be included in the hierarchy, but only one file is designated as the primary file at any time. You can also browse the list of uploaded versions, pin them as the new current version, open the file, and removed the file.

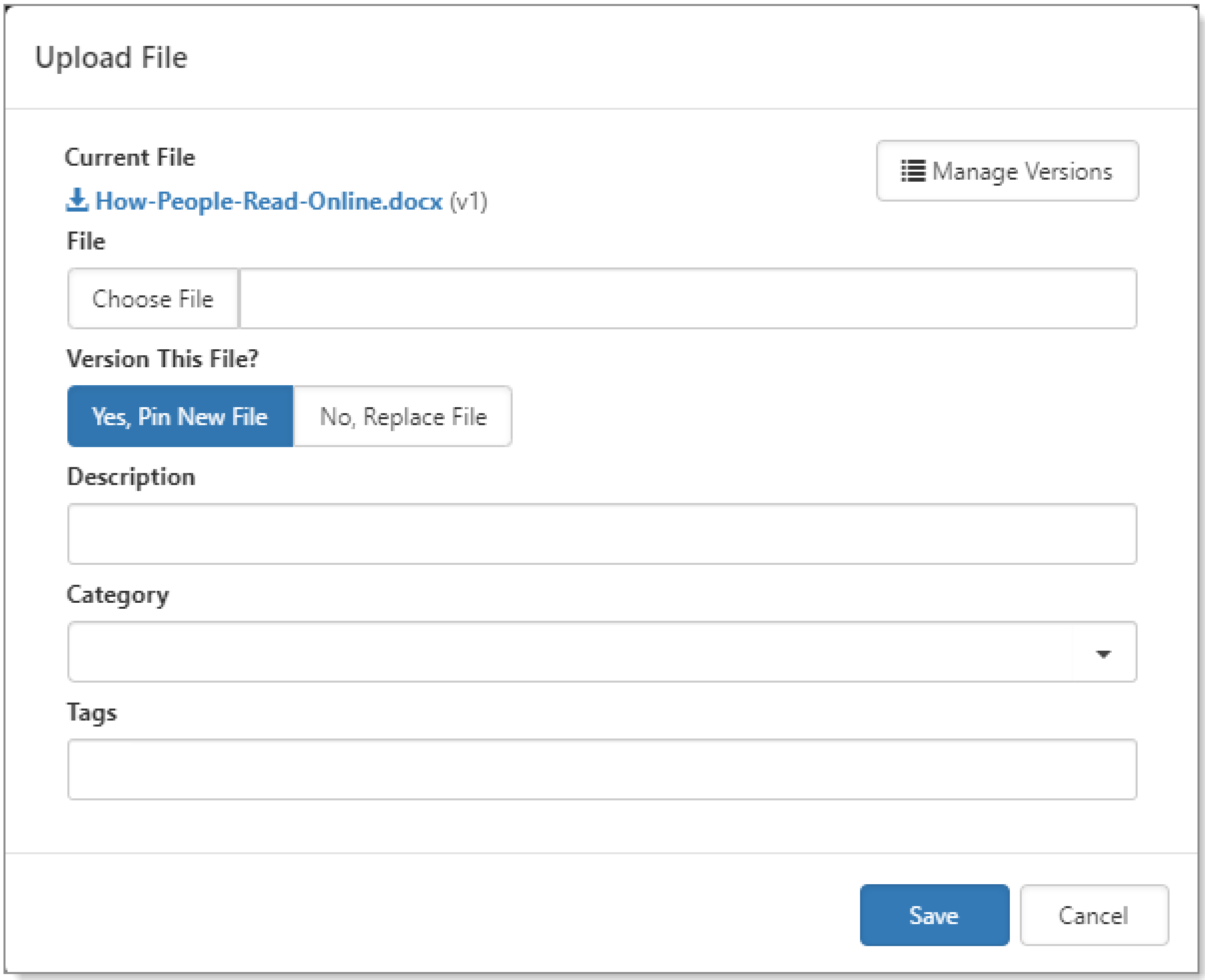
Protected versus unProtected: If files are shared over multiple locations in ClientSpace, they can be managed as individual sets of files (Protected) or as a synchronized set (unProtected). This implementation in ClientSpace is limited to Orgs, Contacts, and Activity attachments. For a description of this methodology, see File version considerations for dataforms.

To add file versions:

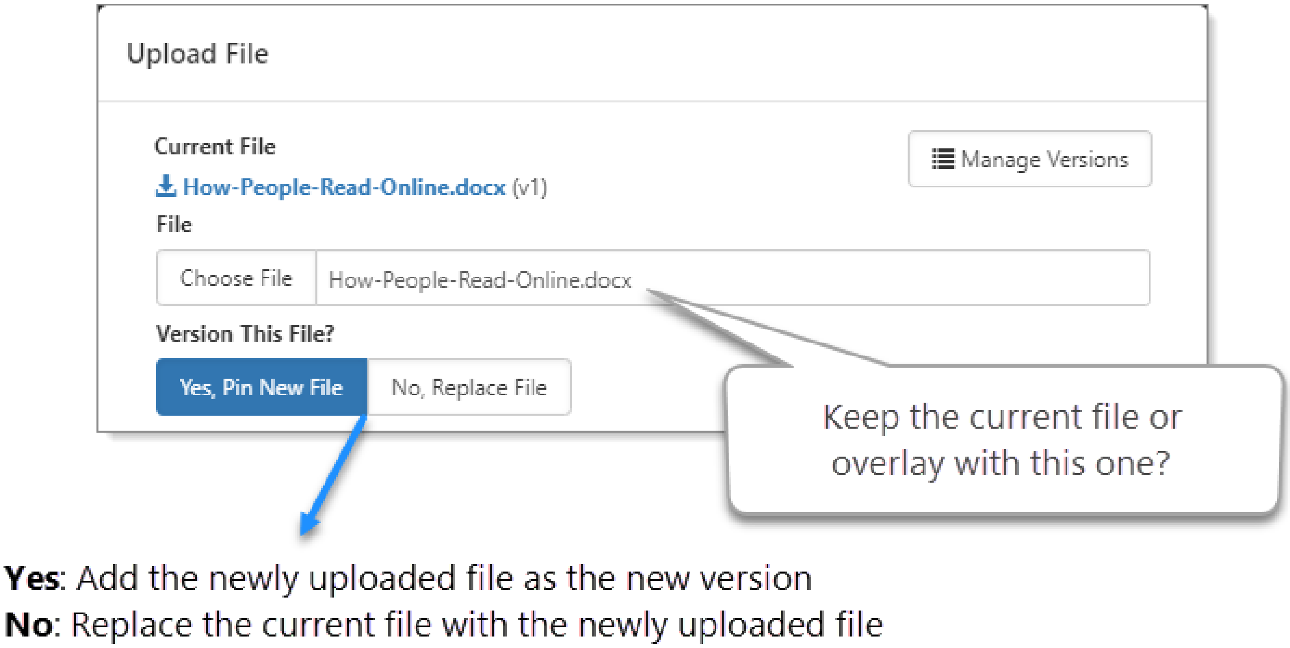
1. From the **Action Center**, expand **Attachments**.
   The existing attachments are listed.
2. Locate the targeted file that you want to manage, and click (**Open**).
   Our example shows a file named How-People-Read-Online.docx.

   The Upload File dialog box opens.





3. To upload a new version, click **Choose File**.
4. Locate the file on your computer and click **Open**.
   You are returned to the Upload File dialog box showing the selected file name.
5. For **Version This File?**, select one of the options:
   - **Yes, Pin New File**: Default setting. Retains all file versions and pins the most recent uploaded file.
   - **No, Replace File**: Do not retain file versions. Replaces the current file.

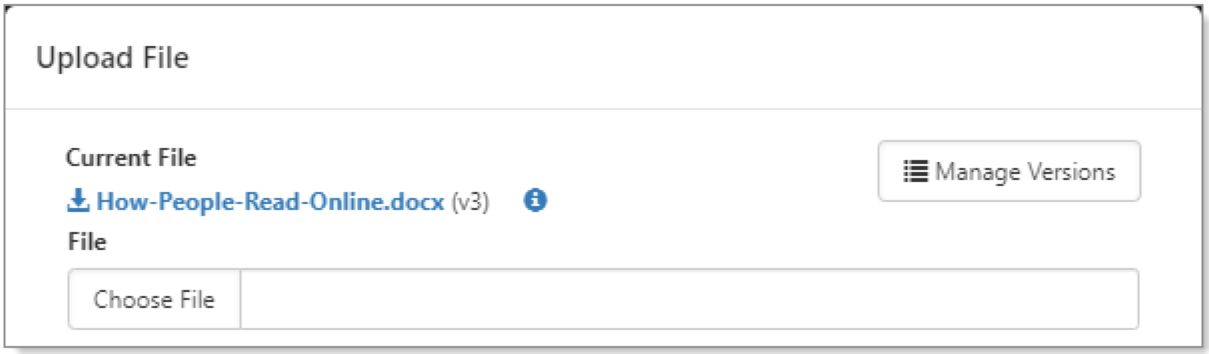


When a new file is uploaded using the default version setting, the Current File moves to the versions list, and sets the newly uploaded file as the primary.

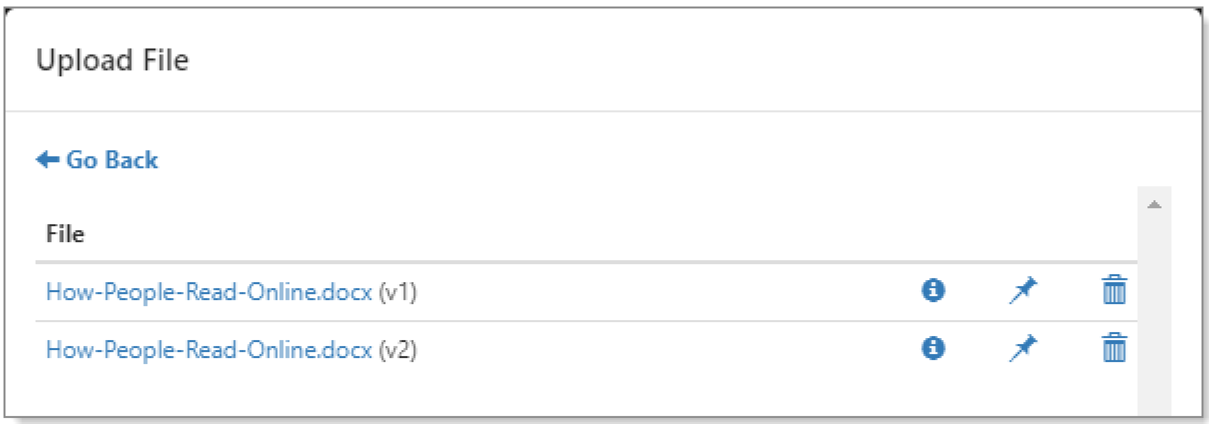
6. For **Description**, type a description of the uploaded file. Optional.
7. For **Category**, select an entry from the list. Optional.
8. Click **Save**.

To manage versions:

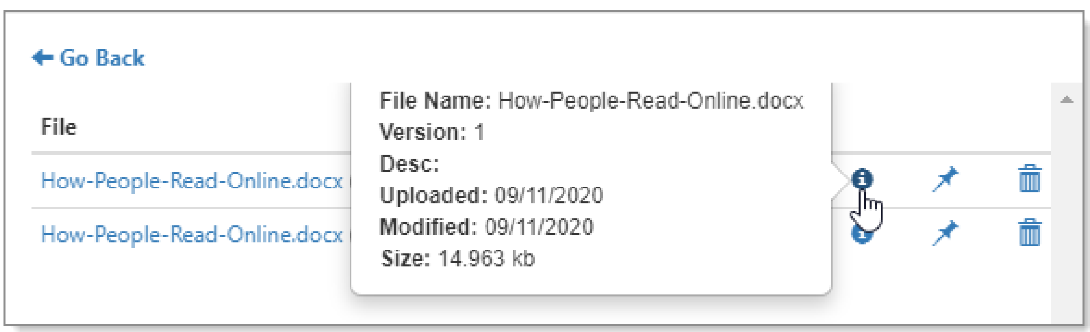
1. From the **Action Center**, expand **Attachments**.
   The existing attachments are listed.
2. Locate the targeted file that you want to manage and click (**Open**).
   Our example shows a file named How-People-Read-Online.docx (v3) as the current file, and is now version 3.
   - (Optional) View the file properties: Click .
     Properties provide File Name, Version, Description, Uploaded Date, Modified Date, and Size.



3. Click **Manage Versions**.
   The list of file versions displays. Our example shows there are two older versions: v1 and v2.



4. From here you can:



   - Open a file: Select the file.
   - View file properties: Click .
     Properties provide File Name, Version, Description, Uploaded Date, Modified Date, and Size.
   - Pin file as current version: Click .
     You must be a global admin or have the FileMan_Pin entity. Pinning a versioned file takes

effect immediately, no save is needed. For details about security entities, see Security entities.

- Remove: Click .
  Removing a versioned file takes effect immediately, no save is needed (a confirmation message is presented before the delete is executed). Remove is available if you are a global admin or have the FileMan_Delete entity. Additionally, the file cannot be in use in another location. For details about security entities, see Security entities.

5. Click **Save**.

Security entities

The file attachment datatype adheres to both dataform and file management security rights. These security rights work in the following way:

Dataform_Field security: View/Add/Edit/Delete controls whether a user can:

- **View**: View the file from the field.
- **Add**: Add a new file when the field is empty.
- **Edit**: Update or change an existing file (folder icon).
- **Delete**: Delete a file from the Dataform (trashcan icon).

With field edit rights comes an additional layer of security in the Upload File dialog box using the File_Man security entities:

- **File_Man_Delete**: Delete a version of the file.
- **File_Man_Pin**: Swap files in the versioning hierarchy.
- **File_Man_Ver_Override**: Override the default setting when uploading a file. The user can select either the Yes, Pin New File or No, Replace File. Each time the page loads, the default value is selected.

File version considerations for dataforms

While the process is consistent in use, it is important to recognize the following conditions and how they affect the process. Uploading a new file takes effect only after saving the Upload File dialog box AND the dataform is saved. If a Current File exists, uploading a new file and clicking Save pins the new file as the Current File and versions the existing file.

The Dataform field File Name appears in red ink if it has changed and the form is not yet saved. If the dataform is not saved, no changes are made, and the newly uploaded file is abandoned. If the dataform is not saved, no changes are made.

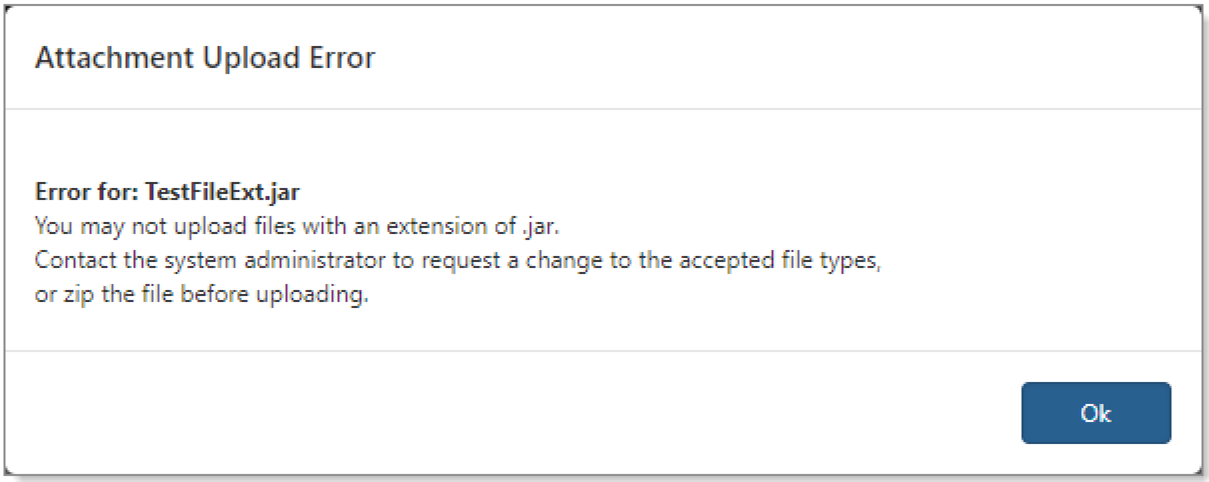
For Orgs, Contacts, and Activity attachments, the behavior is similar to dataform attachments. For Orgs and Contacts, pinning is synchronized. For Activity attachments, pinning does not affect Contact/Org (Protected).

Example

- Upload File_A to Contact.
  - File_A appears on both Contact and Org.
- Upload File_B to Contact.
  - File_B appears and is pinned on Contact and Org.
  - File_A is versioned on both.
- Pin File_A on Contact.
  - File_A is also pinned on Org (UnProtected).
  - File_B is versioned on both.
- Pin File_B on Org.
  - File_A is still be pinned on Contact.
- Upload File_C on Org.
  - File_C is pinned on Org.
  - File_A remains pinned on Contact.
  - File_C is in the version list on Contact.

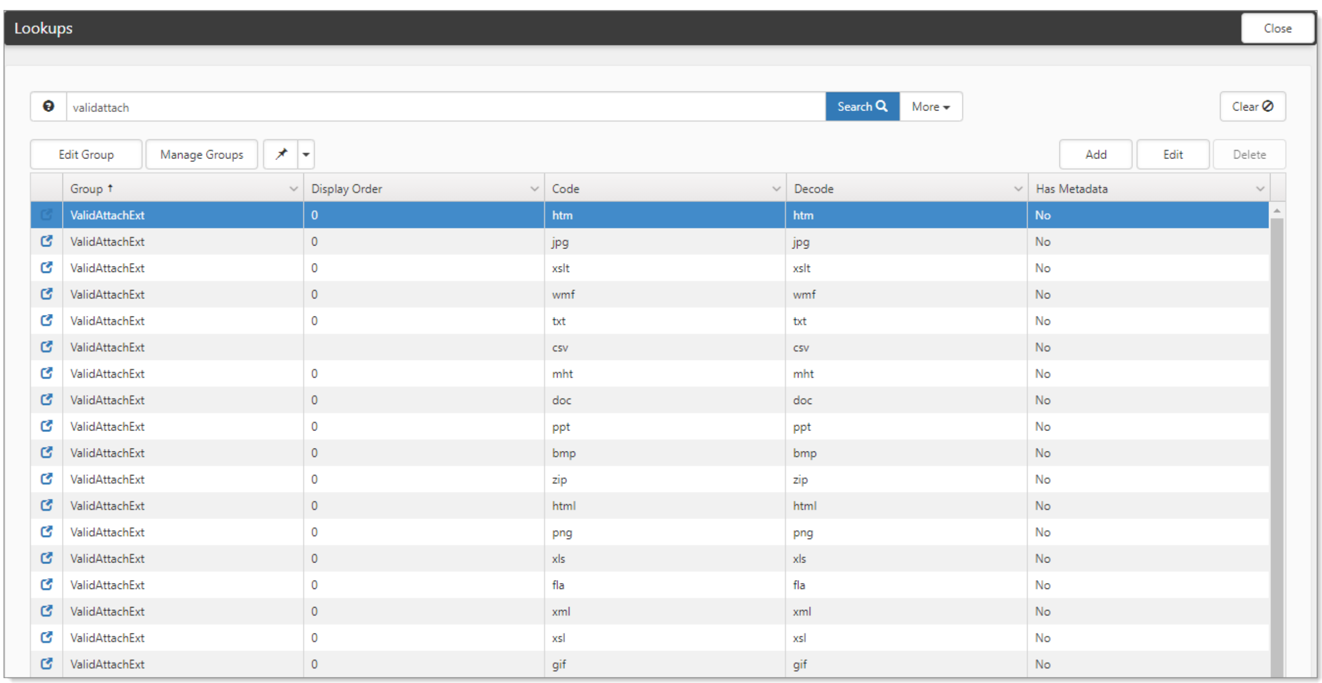
Adding accepted file types for file attachments

Specific files can be harmful to your computer, so ClientSpace provides a way for the admin to restrict what file types can be uploaded. If you encounter one of these restricted file types during an upload, the following message is displayed. However, if you want to allow certain file types, you do this through Lookups.



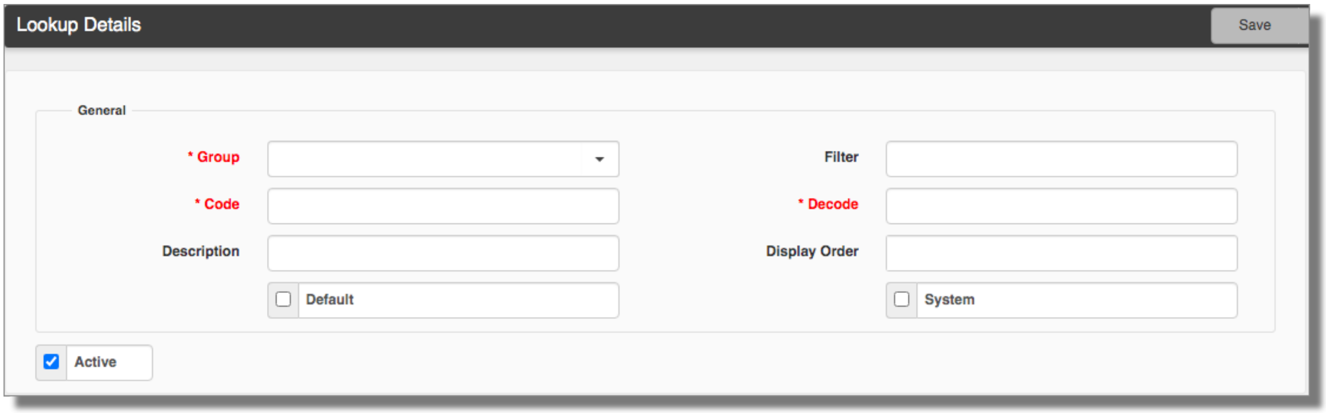
To add accepted file types:

1. Determine the file type you need to upload.
2. Go to **System Admin** > **Lookups**.
   The Lookups dashboard opens. Our example is filtered for the Lookup Group that determines which file extensions are accepted, **ValidAttachExt**. Review the list to ensure the file type in question is not there.



Group	Display Order	Code	Decode	Has Metadata
ValidAttachExt	0	htm	htm	No
ValidAttachExt	0	jpg	jpg	No
ValidAttachExt	0	xslt	xslt	No
ValidAttachExt	0	wmf	wmf	No
ValidAttachExt	0	txt	txt	No
ValidAttachExt		csv	csv	No
ValidAttachExt	0	mht	mht	No
ValidAttachExt	0	doc	doc	No
ValidAttachExt	0	ppt	ppt	No
ValidAttachExt	0	bmp	bmp	No
ValidAttachExt	0	zip	zip	No
ValidAttachExt	0	html	html	No
ValidAttachExt	0	png	png	No
ValidAttachExt	0	xls	xls	No
ValidAttachExt	0	fla	fla	No
ValidAttachExt	0	xml	xml	No
ValidAttachExt	0	xsl	xsl	No
ValidAttachExt	0	gif	gif	No

3. Click **Add**.
   The Lookup Details form opens.



4. Complete the form fields:

Group	Select **ValidAttachExt**.
Code and Decode	Enter the file extension.

5. Click **Save**.

Chapter 12

Contacts

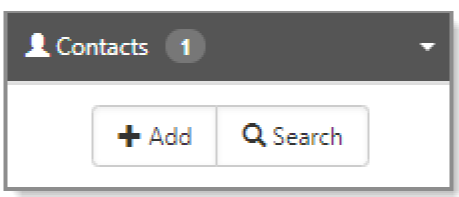
Through Contact records you can maintain detailed information about your clients or potential clients used during the sales process and after, avoiding the need to create a user account in the system. Contact records hold information about people that work for client companies – companies that are in a co-employment relationship. The contact can be an employee, IT staff, third-party vendors, and so on. Contact information can be imported from external systems such as Salesforce and PrismHR.

Adding Contacts to the Organization

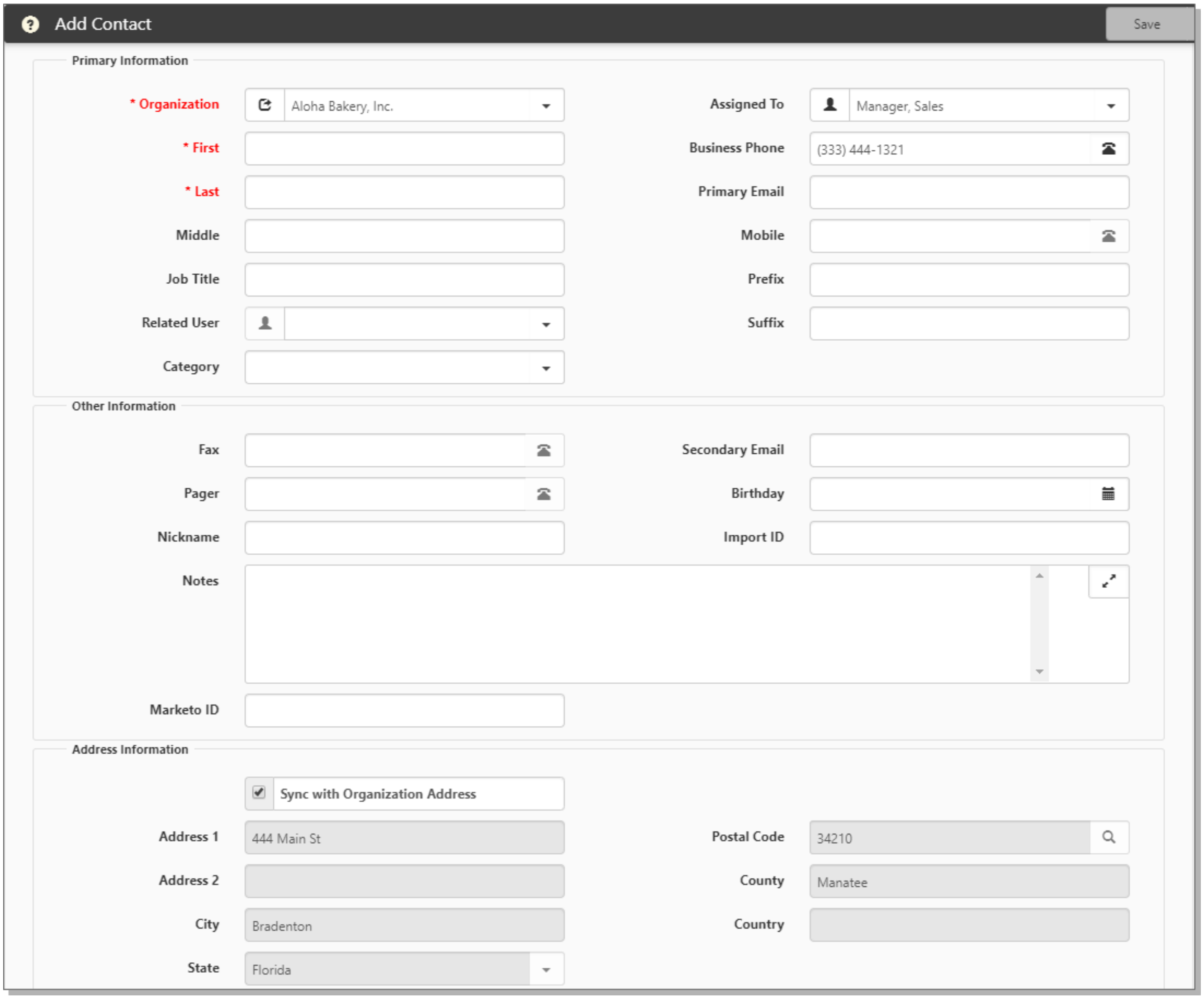
The following procedure describes how to add a contact from the Organization record. To access Contacts, you must have at least **View** rights to the **CRM** security entity.

To add a contact:

1. Open the **Organization** record.
2. In the **Action Center**, expand **Contacts**, and click **Add**.



The Add Contact form opens.



3. Complete the form fields:

Organization	Required. If you are adding a contact from an Organization record, this field is auto-filled with the Organization name.
First, Last, Middle	Required. Provide first and last names. Middle is optional.
Job Title	Required. Provide job title.
Related User	If this contact has a User Profile, select their username from the list.
Category	Select a category that best fits the contact's role in the onboarding process: Payroll, Decision Maker, Operations, Other, Personal.

Assigned To	This is the salesperson who is responsible for onboarding the prospective client.
Business Phone	Contact's business phone number. To add a phone extension, type the full number with the extension: 11122233331234. It renders as (111) 222-3333 x:1234.
Primary Email	Contact's business email address.
Mobile	Contact's mobile phone number.
Prefix	Contact's prefix such as Mr, Mrs, Ms, Dr.
Suffix	Contact's suffix such as Jr.
Fax	Contact's FAX number.
Secondary Email	Contact's secondary email (if applicable).
Pager	Contact's pager number (if applicable).
Birthday	Contact's birthday.
Nickname	Contact's nickname (if applicable).
Import ID	Import ID is auto-filled if the Contact record was imported from another source such as Salesforce.
Notes	Notes are auto-filled if the data was imported from another source.
Marketo ID	Marketo ID is auto-filled If the data was imported from Marketo.
Sync with Organization Address	Select this option to auto-fill the address of the contact from the Organization record. Default is enabled (selected).
Address 1, Address 2	Auto filled if you select **Sync with Organization Address**.
Postal Code, City, County, Country	Auto filled if you select **Sync with Organization Address**.
Active	Default is Active (selected). To inactivate this contact, clear the option. When you attempt to inactivate a Primary Contact, a warning message displays, asking if you want to proceed.

4. Click **Save** when complete.

What's next?

Now that you have a contact set up, you can begin to record sales activities to help you track communication with the prospective client. See Activities.


Watch the video about Contact Overview.

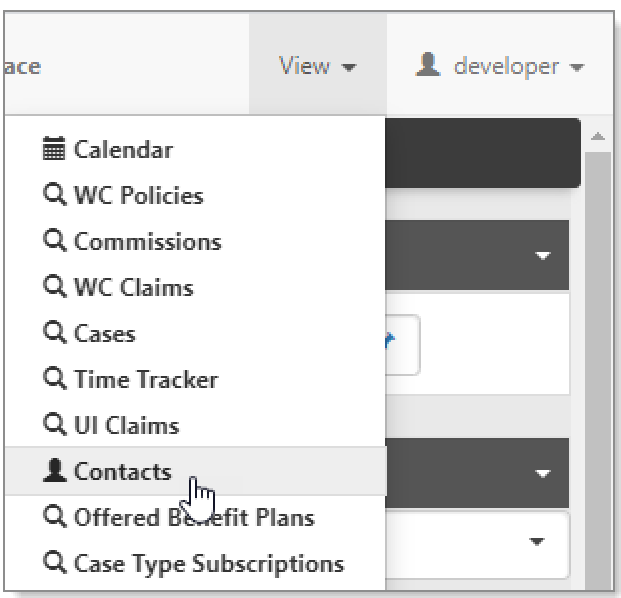

Watch the video Creating Employee Contacts.

Accessing contacts

You can access Contacts in a number of ways – from the Contacts module, a related Organization, a Workspace, or the Client Master.

Contacts module

1. On the modules bar, select **Contacts**.

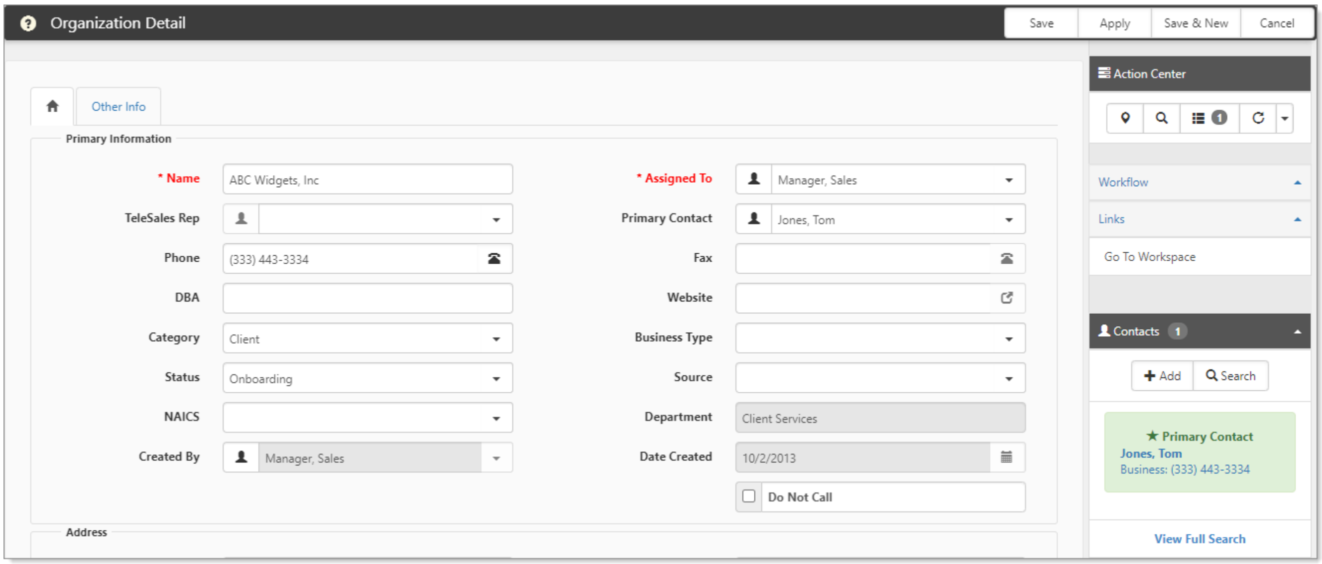


2. If you do not see the Contacts module, click your username, and select **Modules**.
   The Modules Search dashboard opens.
3. Select **Contacts** and click (**Jump**).
   The Contact Search dashboard opens.

Organization

1. From an open Organization, in the **Action Center**, expand **Contacts**.
2. You can **Add** and **Search**.

The initial contact added to an organization is set as the Primary Contact and is listed in green.



Workspace

- From an open Workspace, in the **Action Center**, under **Links**, click **Contacts**.
  These contacts are not directly related to the Workspace, but to the Organization from which the Workspace was created.

Client Master

- From an open Client Master record, click **Client Contacts**.

Additionally, see *Adding contacts to the organization* in the *ClientSpace Sales Management Guide*.

Editing contacts

After you add a contact, you can return to the Organization detail record, search for the contact and edit the contact record. For example, perhaps you want to send out birthday greetings to your contacts. You can update the Birthday field in the contact record.

To edit contacts:

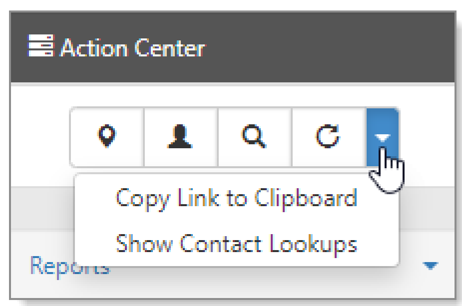
1. Open the **Organization** record.
2. In the **Action Center**, expand **Contacts**.
3. Search for a contact by using the following search techniques:
4. Select a contact.
5. Apply your changes and click **Save**.

Using the Action Center for Contacts

The View User icon displays when the Contact has a Related User (a User Profile). When no Related User is associated, the icon changes to + Create User.

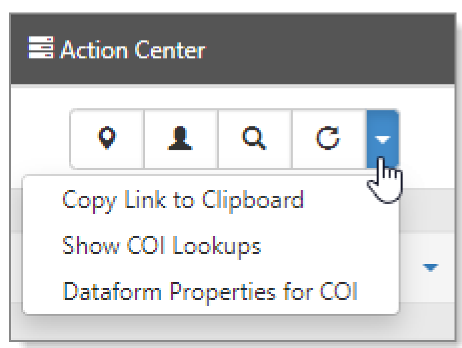
Home tab

On the Contact Home tab, the Action Center toolbar contains options for Map It, View User / Create User, Audit Trail, Refresh, and More Options that include Copy Link to Clipboard, and Show Contact Lookups. When you select Show Contact Lookups, the Lookups page is displayed with a list of lookups for the Contact Detail fields.



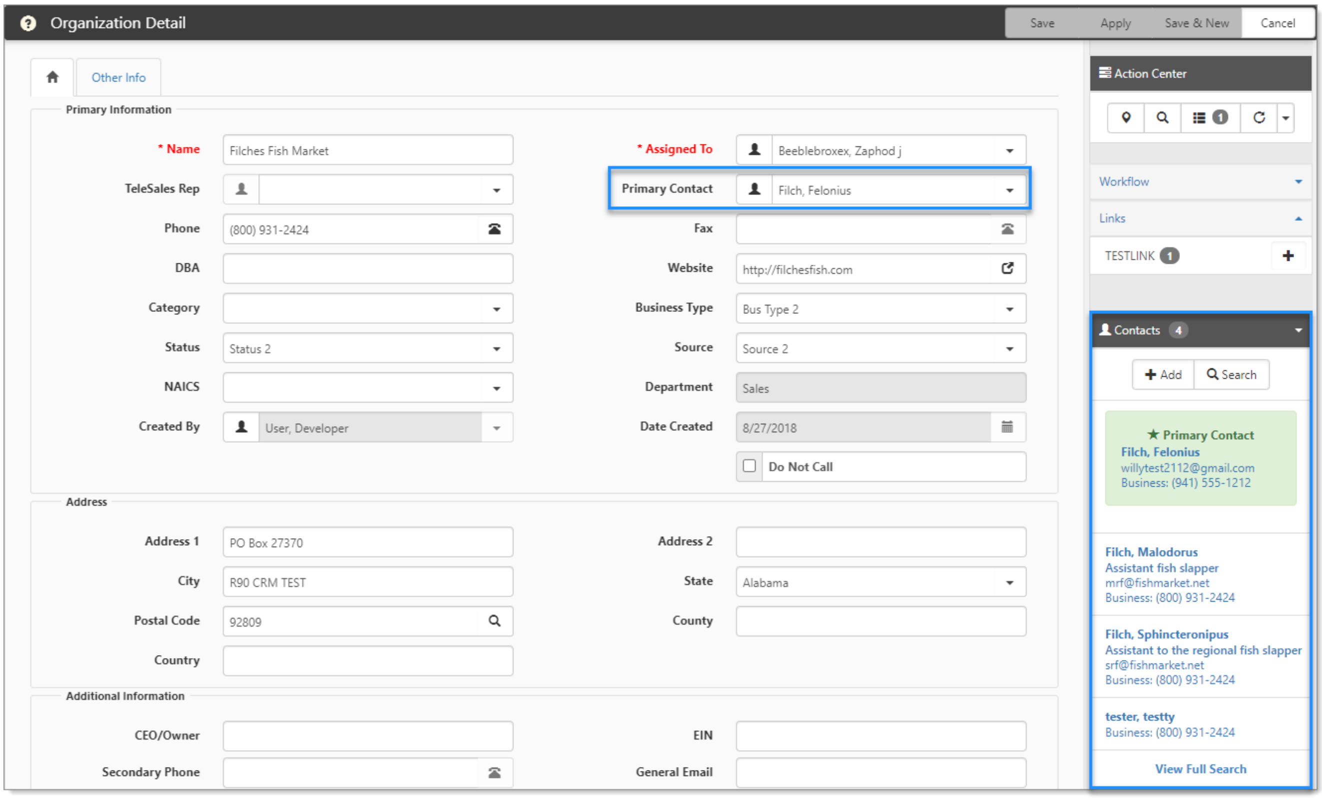
Other Info tab

When you select the Contact Other Info tab, the Action Center changes the Audit link to point to the Contact Other Info Audits and the More Option items change to Copy Link to Clipboard, Show COI Lookups, and Dataform Properties for COI. When you select Show COI Lookups, the Lookups page is displayed with a list of lookups for the Contact Other Info fields. COI represents Contact Other Info fields.



Viewing and adding Contact Tasks

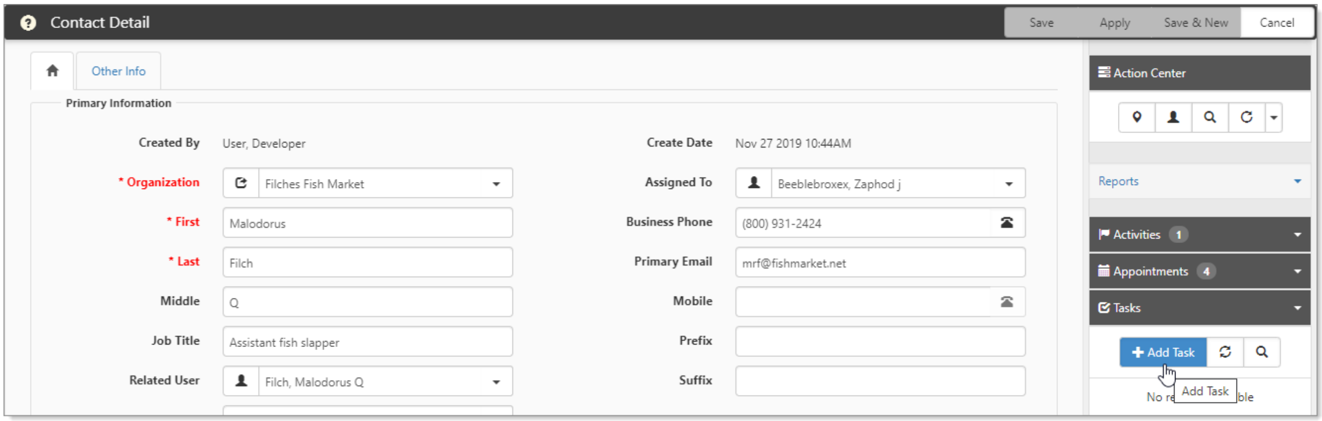
From an open Contact record, you can view and add tasks for the contact. Let's start at the Organization level. In the Action Center, the example shows an Organization record with four contacts, with the Primary Contact shaded in green.



Let's open a contact and then add a task for that contact.

To open a contact and add a task:

1. In the **Action Center**, expand **Contacts**.
2. Select a contact.
   The Contact Detail form opens.
3. In the **Action Center**, expand **Tasks**.
4. Click **Add Task**.

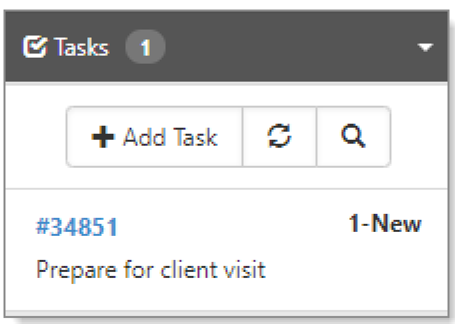


The New Task form opens.

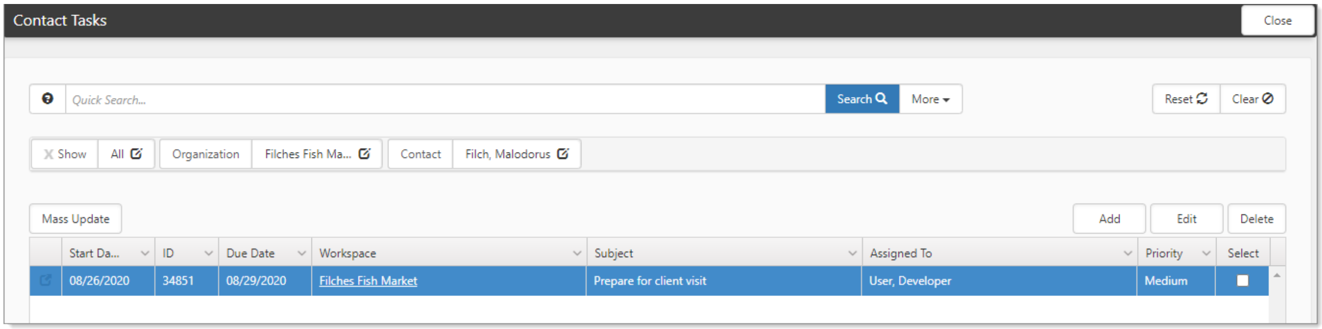
5. Complete the fields. For details, see Adding tasks.
6. Click **Save**.
   You are returned to the Contact Detail page.

To view contact tasks:

1. From the open Contact Detail page, in the **Action Center**, expand **Tasks**.
   The Tasks list shows active tasks for the selected Contact.



2. You can select a task from the list or click **View Full Search**.
3. When you select **View Full Search**, the Contact Tasks list displays.
   By default, all records are displayed - Active and Inactive - for the Organization and Contact. Inactive records are displayed in bold and italics. The chiclets indicate the applied filters. Inactive records display in bold and italics.



4. To view only active tasks, on the chiclet, click **X** Show All.
   This action removes the filter to display only active tasks.

Employee Contacts

Through Contact records you can maintain detailed information about your clients or potential clients used during the sales process and after, avoiding the need to create a user account in the system. Contact records hold information about people that work for client companies – companies that are in a co-employment relationship. The contact can be an employee, IT staff, third-party vendors, and so on. Contact information can be imported from external systems such as Salesforce and PrismHR.

Video

Watch the video about Employee Contacts.

Linking contacts: Employees and Users

Employees: You can link Contacts to Employee records in the system. This allows the employee to be included in system notifications, such as calendar events. If a contact already exists for an employee, they can be linked by simply selecting the appropriate contact on the employee record. If no contact exists for the employee, you can add a contact the option to Add Contact from this same field.

Users: Contacts can also be linked to user records with the Create User functionality. On the Contract record, when Create User is selected, and the record is saved, the system generates a user record using contact information such as First Name, Last Name, Phone, Email, and associated Organization. This information is combined with the user profile settings from a pre-designated Contact User Template to generate a user record that is automatically linked to the contact from which it was created.

Using the Contact User template

The Contact Management system enables Contact users to be created from a template. When the Create User option on the contact is checked and the contact record is saved, the system generates a user record using contact information such as First Name, Last Name, Phone, email, and associated Organization. The system then combines this information with user profile settings from a pre-designated Contact User Template.

The fields that are cloned from the template user include:

- DepartmentID
- Company
- Time Zone
- ForcePasswordChange
- AddProjects
- CanTrackTime
- SendCoreEmail
- DefaultWorkspace

The system will always set the UserType to External and Default to Next to true.

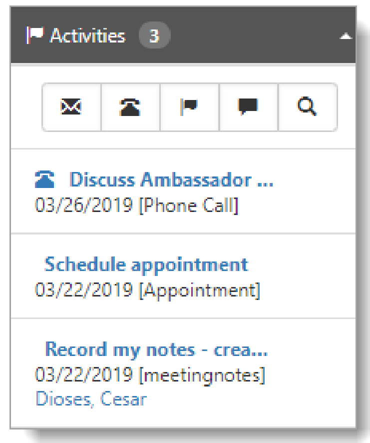
An Application Variable **app-i-contact-templateuser** specifies the UserID of a Template User to be used when generating the contact user records. For help configuring this option, log an Extranet case.

Caveats to using the contact user template:

- A Default workspace must be set for the associated Organization or a Hard Error will be invoked.
- Any User save failures (username in use, etc.) will appear as a Hard Error and must be resolved before the Contact can be saved.

This system also synchronizes the default assigned to user with the associated organization. When creating a new contact, the system will default the contact Assigned To field, matching it to the Organization Assigned To. When Org Assigned To changes, the system updates all associated contacts synchronizing the Assigned To user with the Organization.

Chapter 13
Activities



The **Activities** area of the **Action Center** gives you quick access to all activities associated with the Organization at a glance. Activities include Email, Phone Call, Follow Up, Note, View Full Search, and View Summary.

In addition to managing activities, ClientSpace provides a counter to indicate the number of current active activities. When you expand Activities, a mini panel provides the date of the activity, activity type (indicated by the corresponding icon), associated contact, and the subject of the activity.

Email is ubiquitous today and has become one of the primary methods of business communication. ClientSpace allows you to manage your email communications with prospective clients directly from the Organization record, where you have notes, calls, and follow-up information at your fingertips. Email activity shows the origin of the activity as ClientSpace, Salesforce (through the API), or the Email Add In. This additional information provides insight into activities created through these paths.

Note: The system uses the Send Email process to validate email addresses. If an email address is determined to be invalid, the invalid email address is stripped from the resulting email. The email message is then sent to any other email addresses that include valid formatting. The system logs an informational exception to indicate the email address was invalid.

Phone Call: Keeping track of calls you made and the conversation can be a daunting task, especially if you are using mass contact functions such as a marketing campaign to reach a broad audience all at once. Through ClientSpace, you can record the subject of your call, what you talked about, whom you talked to, the result of the call, and the date.

Follow Up records provide a reminder for you to contact the prospective client later either concerning a previous call or email or as a direct contact to keep you and your company top of mind for the prospect. When you add a Follow Up, it creates a Note record with Follow Up as the default activity type.

- Follow Up records can also be converted to another type of record such as a Phone Call or an Email. When you open the Follow Up activity, the Activity Type is cleared so that you can select a different type.
- The Organizations area of the Home Dashboard in ClientSpace only displays Follow Ups from today and earlier. If these Follow Ups are consistently assigned an appropriate activity, such as Email or Phone Call, this section of the Home dashboard can be used as a ToDo list of items that should be done by today or prior.

When you add a **Note**, it opens a new Note record to record detailed information about your prospective client. Using Notes in concert with Email, Phone Call, and Follow Up ensures that you have all the information you gather about a prospective client at your fingertips.

View Full Search allows you to view all activities for an organization to include active and inactive records. It displays a full list of available records. The full search is available through the 🔍 icon.

View Summary provides a one-stop-shop for managing activities through a dashboard, showing all activities associated with the Organization. Selecting an activity in the left pane provides a detailed view of the activity on the right. The activity list can be filtered, allowing you a quick method of reviewing all activities.

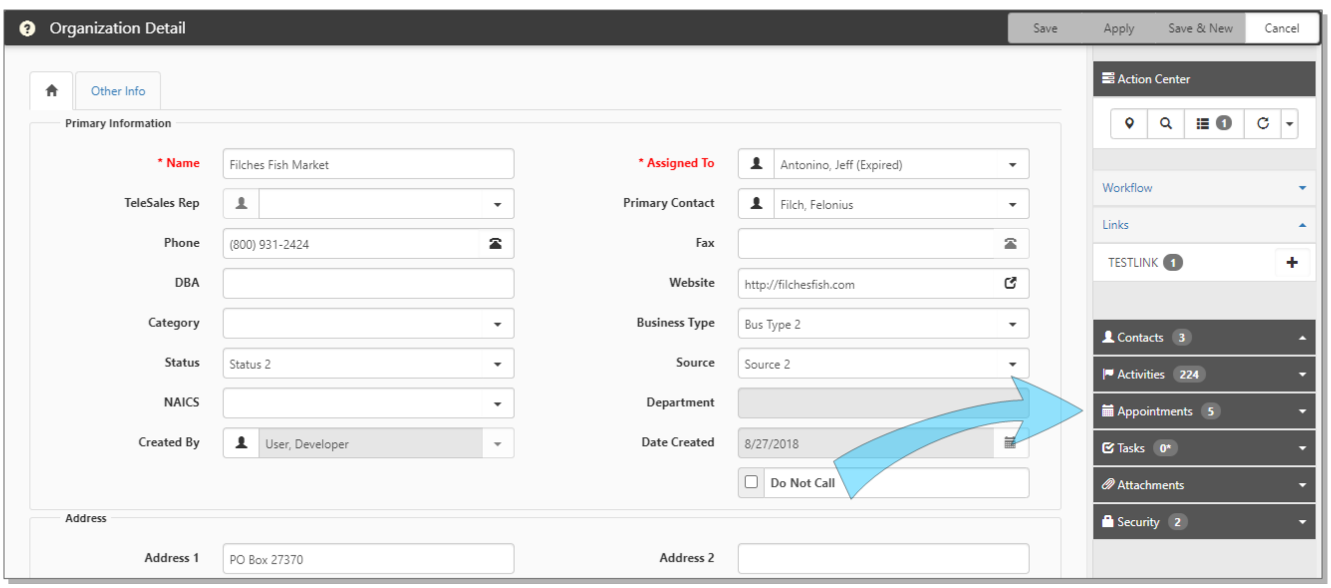
Watch the video about Managing Activities.

Chapter 14 Appointments

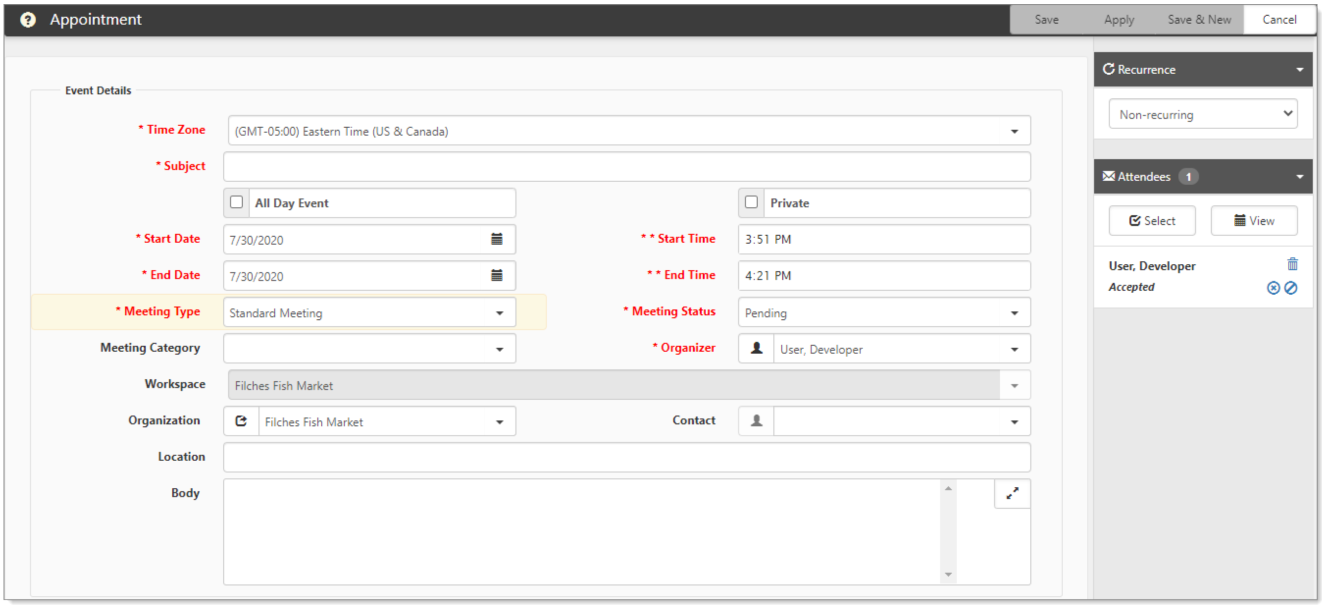
Appointments are events that you add to your calendar using the Action Center from the open Organization record. Additionally, you can schedule appointments with clients from the Action Center and your ClientSpace calendar. Adding appointments from the Action Center saves you time by creating the event on your calendar and recording the event with the Organization.

To create an appointment:

1. Open an **Organization**.
   The Organization Detail form opens.



2. In the **Action Center**, expand **Appointments**.
3. Click **Add**.
   The Appointment form opens.



4. Complete the form.

Time Zone	Required.
Subject	Required.
All Day Event	Select this option if the appointment is an all day event. This sets aside the time on your calendar to avoid conflicts. This option auto-fills the Start Time and End Time for the selected date.
Private	Displays the appointment details on the user's calendar as private to any other user who may be viewing.
Start Date	Required. Start date of the appointment.
End Date	Required. End date of the appointment.
Start Time	Required. Start time of the appointment.
End Time	Required. End time of the appointment.
Meeting Type	Required. Select a meeting type: Admin, Closing, HR, Proposal Meeting, Initial Appt, Standard Meeting.
Meeting Status	Required. Select Pending, Confirmed, Completed, Canceled. The initial setting is Pending.
Meeting Category	Customized by your installation through Lookups. For configuration

	assistance, log an Extranet case.
Organizer	Required. This field defaults to the Assigned To user in the Organization record, which is the salesperson responsible for onboarding the prospective client.
Workspace	Defaults to the Organization's workspace. If the Organization has multiple workspaces, the workspace selector provides a list from which to choose one of the associated workspaces.
Organization	Defaults to the Organization associated with the activity.
Contact	The contact person associated with the activity. If not set, you can select a user or add a new contact by clicking **Add Contact** from within the list.
Location	The location of the appointment such as phone, physical location, virtual meeting, and so on.
Body	Provide a description or objective of the appointment. For example, if this appointment is for a meeting, enter the agenda.

5. Click **Apply**.

A new calendar entry is added to the Organizer's calendar within ClientSpace.

To view the new calendar entry:

1. In the Work Center toolset, click (**Calendar**).
   The Calendar opens.
2. Look for the entry that you just added for the **Subject** and **Start Date**.

Chapter 15

Adding Client Visits

Keeping your finger on the pulse of your clients is essential, and nothing makes this easier than regular client visits. Client visits help to keep you in touch with the state of the client relationship and can help to head off issues before they occur. You can add visits through the Visits dashboard or directly from the Workspace, using the Client Visit form. Let's add a visit from the Workspace.

To add a visit from the Workspace:

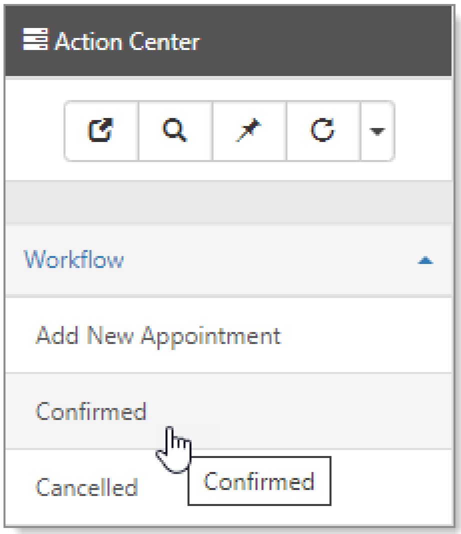
1. On the modules bar, click **Workspaces**.
   The Workspace Search dashboard opens.
2. Locate a workspace and click (**Jump**).
3. Move to the bottom of the page where you see the dataform tiles and click **Client Service** > **Client Site Visit**.
   The Client Site Visit dashboard opens.
4. Click **Add**.
   The Client Visit Add form opens with some of the fields filled with default values.
5. Complete the following fields:

Location	Select the client location.
Visit Type	The available Visit Types are based on the selected Department. Visit types with an **(R)** indicate a recurring visit. When you mark the visit as Completed, and refresh the Client Visit dashboard, the next Planned visit appears in the list.
Visit Status	Indicates the state of the visit. This is a read-only field, controlled by the Workflow Links in the Action Center.
Visit Date	The planned visit date. After the date is confirmed, change the Status to Confirmed, and then click Save. **To put this event on your calendar:** • In the Action Center, click **Add New Appointment**. The information is copied to your ClientSpace calendar.
Department	This is the internal department that is conducting the visit. Department selection determines the available items in Visit Type.
Visit Goals	Provide notes about your visit goals.

6. Click **Save**.

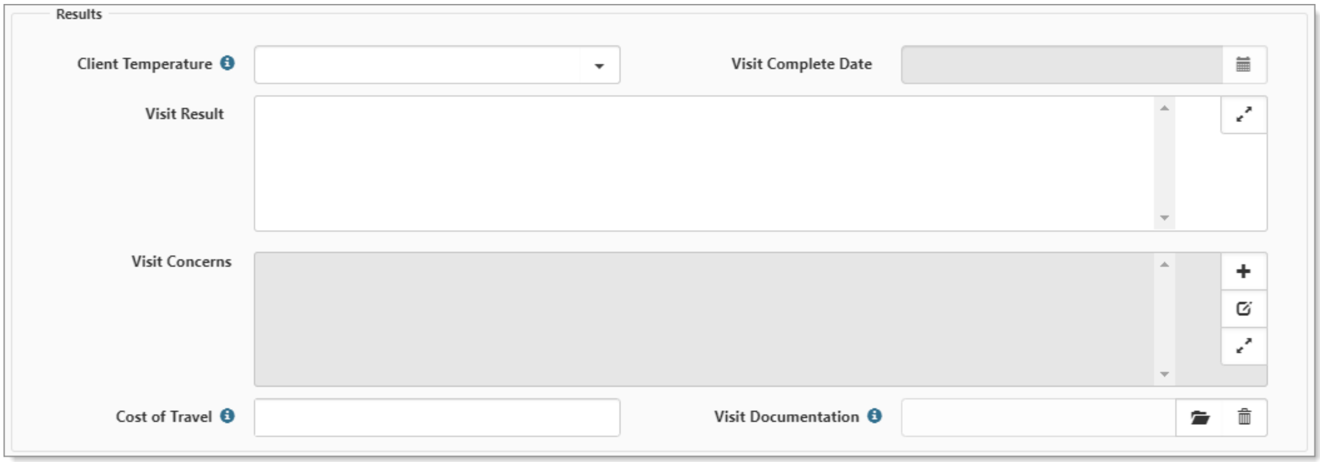
When the visit is confirmed:

1. When the visit is confirmed with the client, in the **Action Center**, click **Confirmed**.



The Visit Status changes to Confirmed.

When the visit is complete, add the visit results:



1. Complete the fields.

Client Temperature	Select a color to indicate the client's level of satisfaction: • Green: Client is happy. • Red: Client is not happy. • Yellow: Client needs more service to bring the level up to Green.
Visit Complete Date	Auto-filled when the visit is complete.
Visit Result	Provides notes to document your visit.
Visit Concerns	Provides notes to document any client concerns.
Cost of Travel	Add the cost of travel for your expense reporting.
Visit Documentation	You can upload any documents that are associated with this visit.

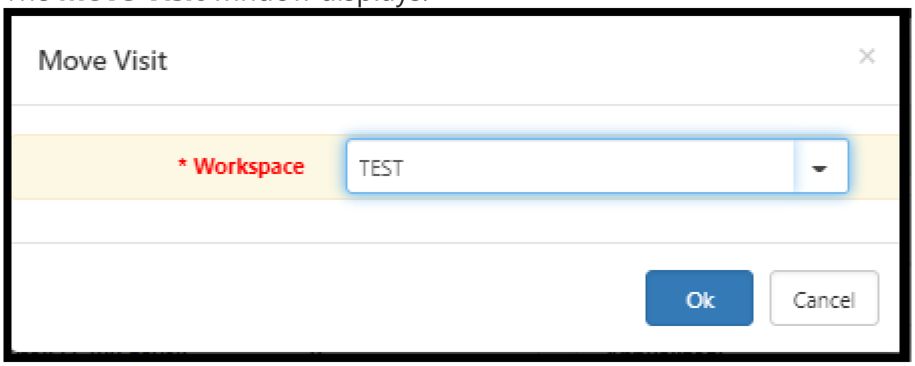
2. Click **Save**.

You are returned to the Client Visit dashboard. The confirmed or completed visit is now in the list.

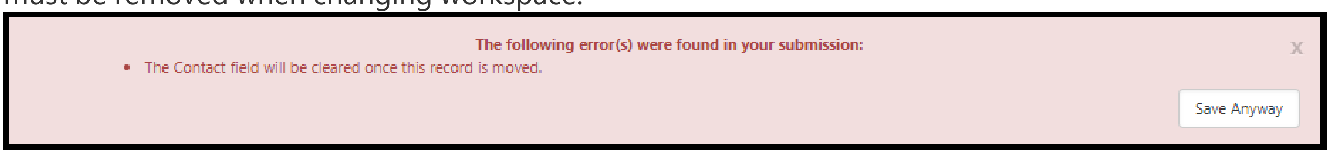
Move a Visit from One Workspace to Another:

Occasionally it is necessary to move a visit from one workspace to another (for example, the visit was added in the wrong workspace). Use this procedure to move a visit.

1. Select the **Visits** module.
2. On the **Visits** dashboard, select (**Jump**) for the row that contains the visit to move to another workspace.
3. Select the **Move Visit** action item from the **Action Center**.
   The **Move Visit** window displays.



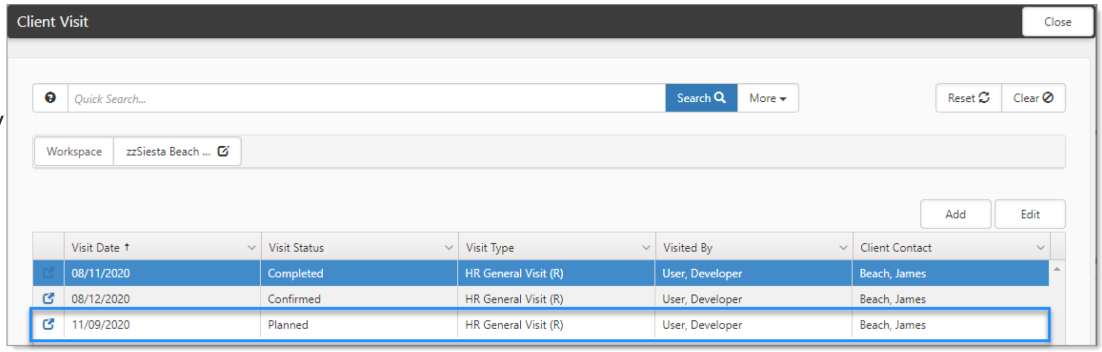
4. Select a workspace in the **Workspace** field and click **Ok**.
   The system displays a soft error message to confirm the change. Contacts are associated with the organization from which the workspace was created, so any contacts associated with the visit must be removed when changing workspace.



5. Click **Save Anyway** to proceed with changing the workspace associated with the visit.

To learn about setting up recurring visits, go to the next topic, Configuring Recurring Visits.

Configuring Recurring Visits



One of the best features of client visits is the ability to set automatically recurring visits. For a recurring visit, when you mark the visit as Completed, the visit is saved and you are returned to the Client Visit dashboard. When you refresh the list, you see that another Planned visit has been set up.

The recurring planned visit can be established from the Client Master **Company Other Info** tab of the Client Master, when you select a Visit Type of R but other forms can be used.

For recurrence to work, your system administrator must configure Lookup metadata for Type of Visit and Visit Schedule. The following procedures guide you through the configuration.

Note: If you need additional fields on the Client Visit Add form than the default fields, advanced administrative access or billable assistance (without a Gold service plan) is required. See ClientSpace Service Plans to learn more about available service plans.

Step 1: Activate the Rule

First, you must activate the rule, CreateNextVisit.

To activate the rule:

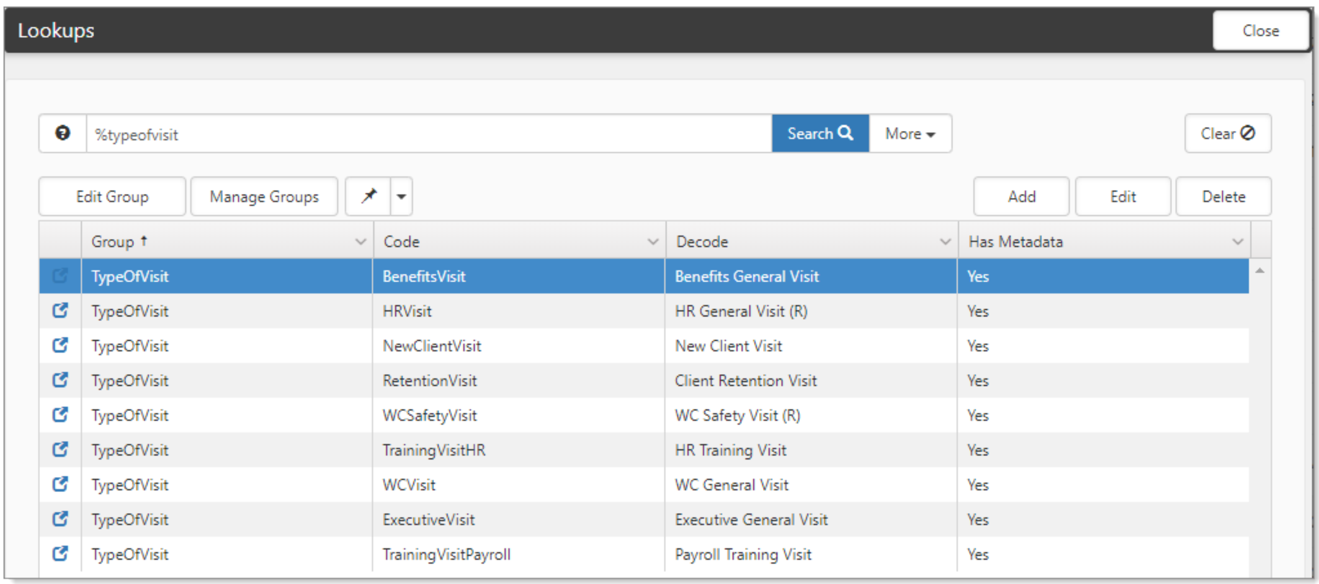
1. Go to **System Admin** > **Advanced** > **Manage Rules**.
   The Custom Logic Rules dashboard opens.
2. Locate the Dataform Client Site Visit with the Method Name **CreateNextVisit** and click (**Open**).
   The Rule Details form opens.
3. Select the **Active** option.
   Typically this rule is set to Active.
4. Click **Save**.

Step 2: Configure the Lookups

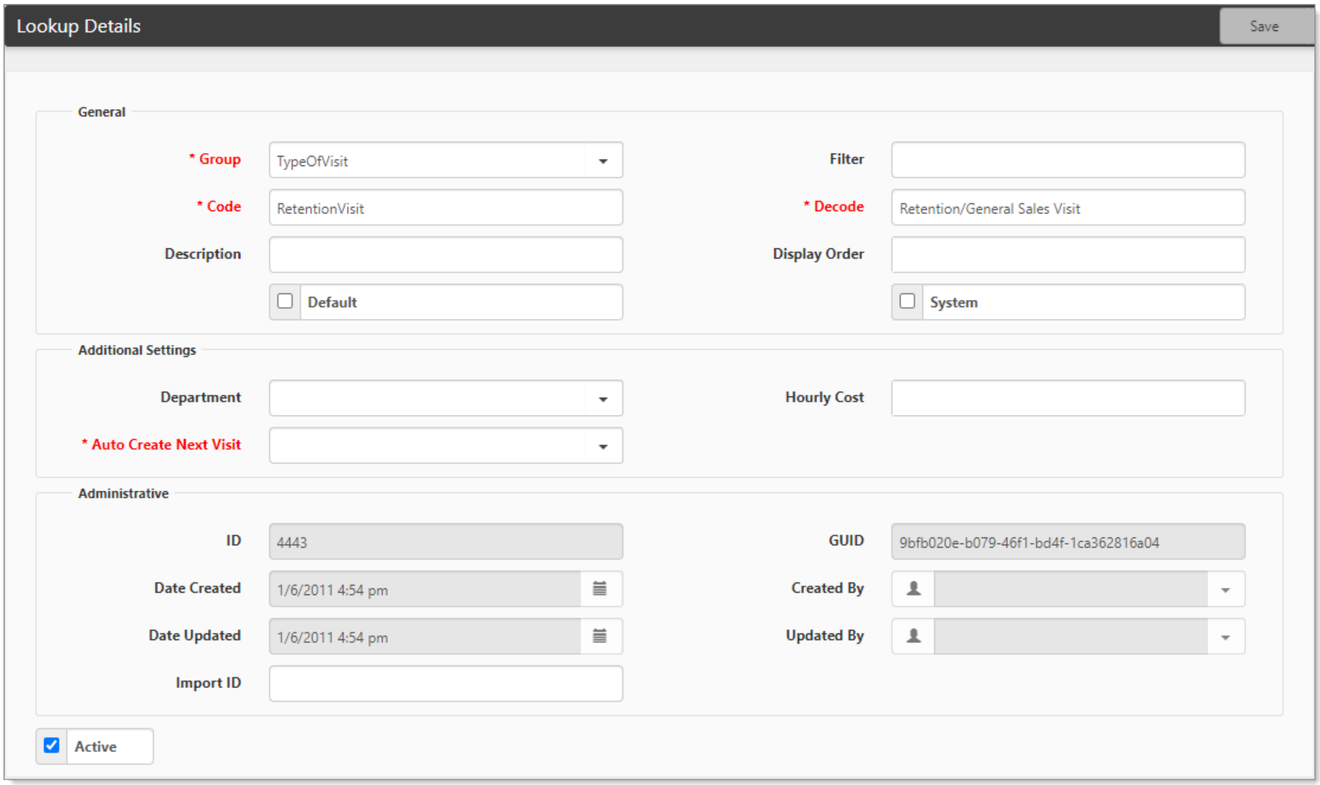
The next step is to configure the Lookup metadata for the Type of Visit and Visit Schedule. Different visit types can have different recurrence frequencies. Additionally, there are multiple entries for each of the Lookups. For recurrence to work, you must configure each one.

To configure the Type of Visit:

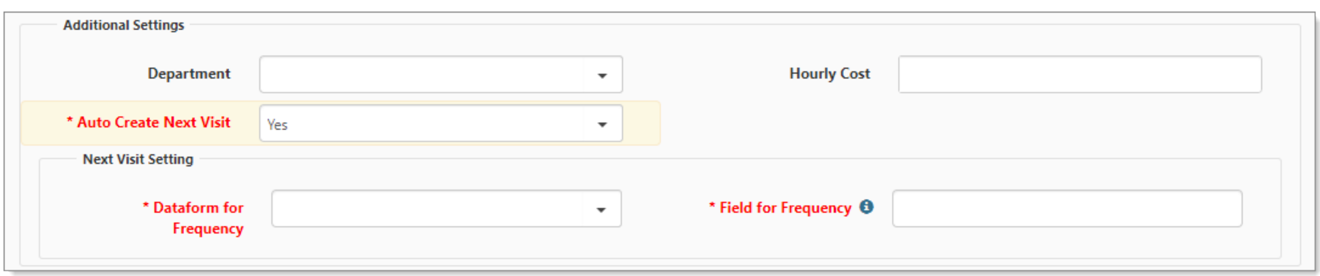
1. Go to **System Admin** > **Lookups**.
   The Lookups dashboard opens.
2. Filter on **TypeOfVisit**.
   There are multiple entries for TypeOfVisit. Configure each type where you want recurrence.



3. Select an entry and click (**Open**).
   The Lookup Details form opens. Our example uses RetentionVisit.



4. In **Auto Create Next Visit**, select **Yes**.
   The **Next Visit Setting** fieldset becomes available, with the required fields **Dataform for Frequency** and **Field for Frequency**.



Dataform for Frequency	Select a dataform containing the field that you will use to determine how often a recurrence will occur. The **Company Other Info** dataform is often used. However, this can be any dataform.
Field for Frequen	Enter the **Field Name** (not **Field Label**) in this field. This must be a field located on the selected **Dataform for Frequency**. Additionally, the designated **Field for Frequency**

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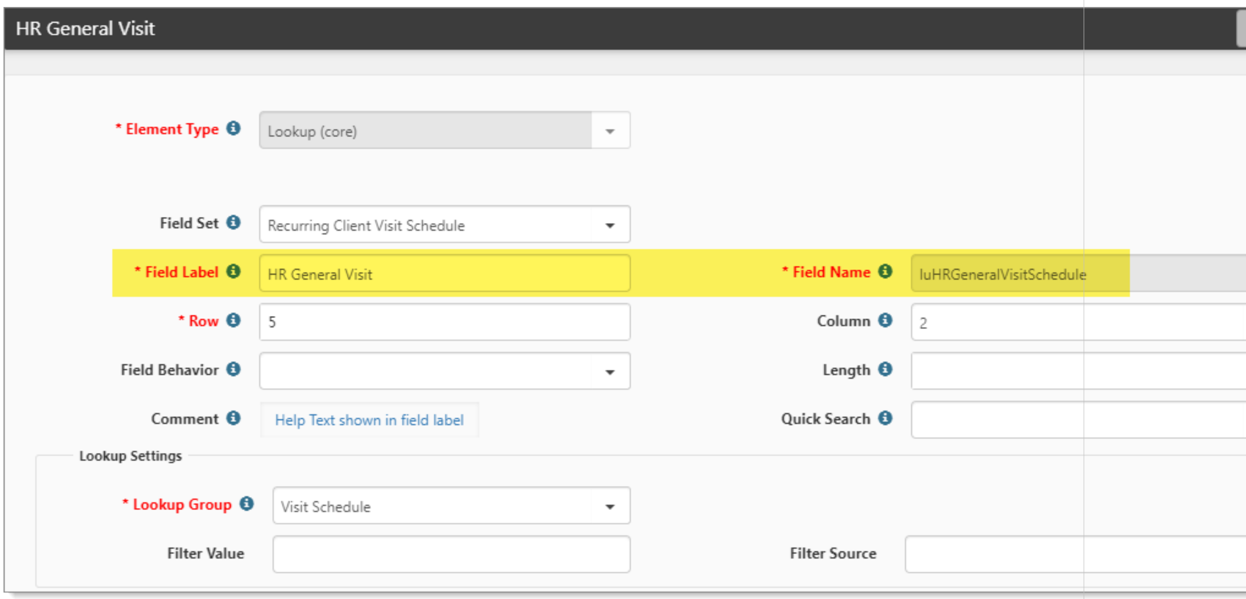
must have an Element Type of Lookup (core) in the Lookup Group Visit Schedule and Visit Schedule metadata must be configured.

Note:

If you have advanced administrative access, you can locate the Field Name by opening the dataform properties and displaying the fields of the dataform you specified in Dataform for Frequency. To do this, on the Dataform Admin dashboard (System Admin > Advanced > Dataform Admin), click (Jump) next to the dataform name. To view the fields, in the Action Center, click Fields. Double-click the desired field to display the field properties. This is where the Field Name is found.

In the example below, we are displaying the field properties for the HR General Visit field. You can see that it has a Field Name of luHRGeneralVisitSchedule. If you wanted to use this field as the Field for Frequency, you would enter luHRGeneralVisitSchedule.


If you do not have advanced administrative access, alternative ways of getting the Field Name are to ask a Global Admin for assistance, create a BI report so that you can see field names, or log an Extranet case for assistance.

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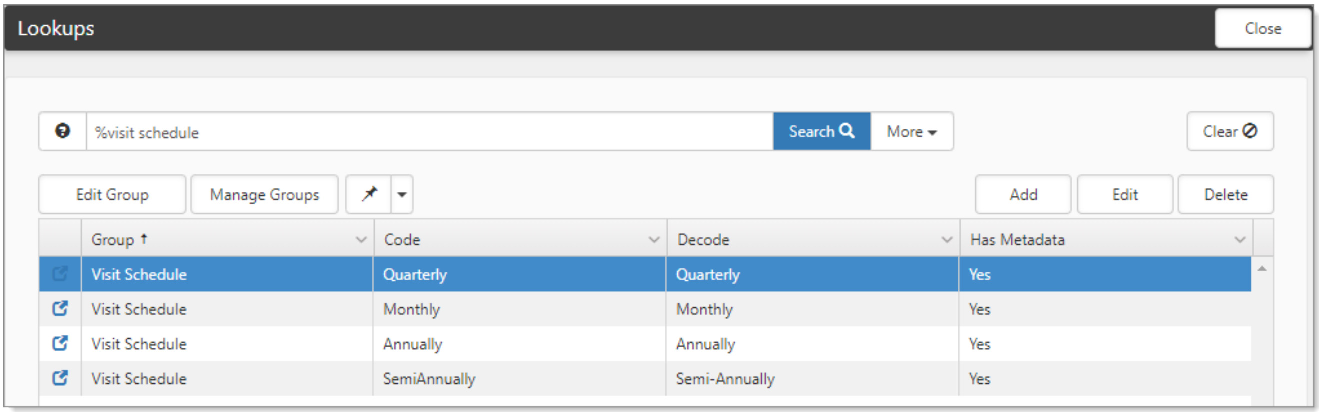
5. Click **Save**.

To configure a new frequency:

Lookups for Visit Schedule are already configured with frequency.

1. To view frequency, in Lookups, filter for **Visit Schedule**.
   The entries are already configured. However, you may want to review or add a new frequency.



2. To add a new frequency, click **Add**.
   The Lookup Details form opens.
3. Complete the fields:

Group	Select **Visit Schedule**.
Code	Enter a name, such as Weekly.
Decode	Enter the name again, such as Weekly.

4. Click **Apply**.
   The Additional Settings fieldset becomes available.
5. In **Days per Frequency**, enter a number. For example, for Weekly, type 7.
6. Click **Save**.

Related Topics:

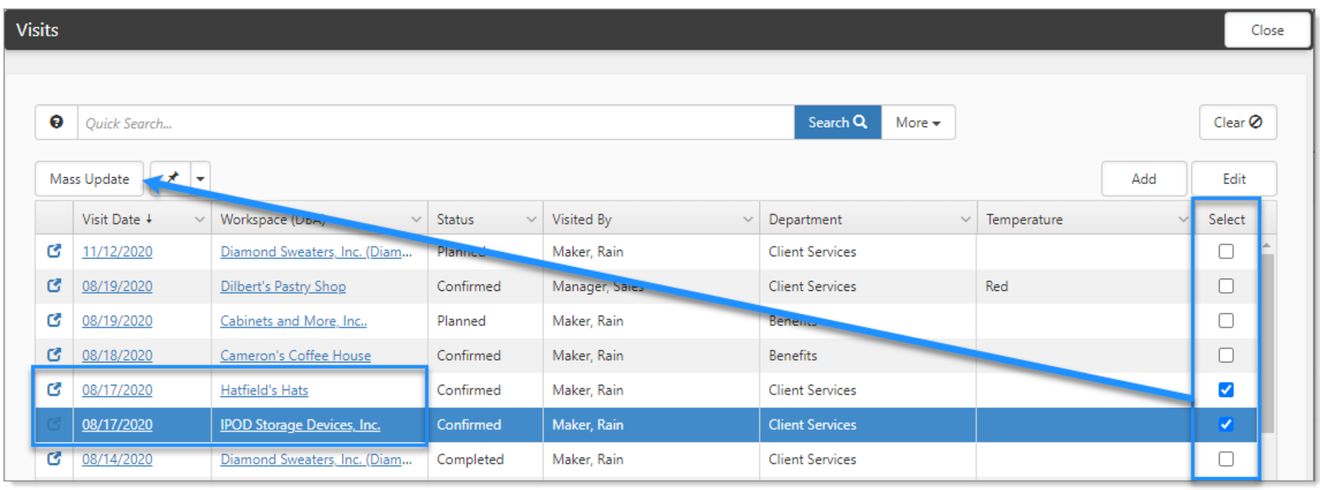
- Adding Client Visits
- Updating visit status using Mass Update

Updating visit status using Mass Update

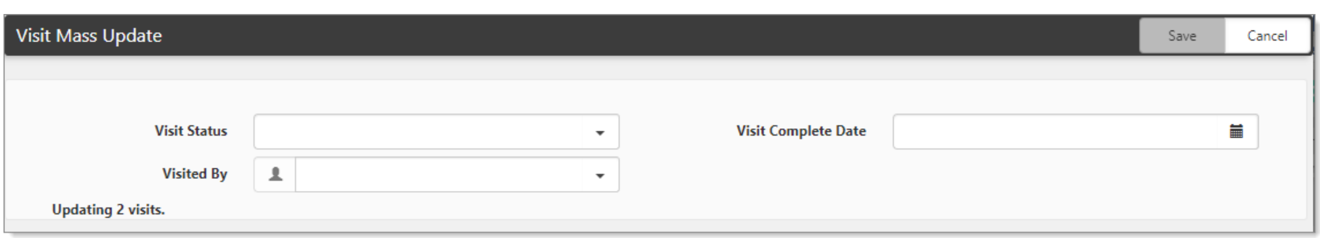
After returning from client visits on the same day, you can use the Mass Update function to update the Visit Status, Visit Date, and Visited By for multiple client visits. Mass Update is a helpful time-saver, eliminating the need to open each Visit entry separately when the response is the same.

To update using Mass Update:

1. On the modules bar, click **Visits**.
   The Visits dashboard opens with a default sort of Visit list ascending.
2. To change the default order, click **Visit Date**.
   The most recent client visits sort to the top.
3. Locate the client visits that are candidates for Mass Update, and click the **Select** option for each entry.



4. Click **Mass Update**.
   The Visit Mass Update form opens.



5. Complete the form:

Visit Status	Select **Completed**.
Visit Complete Date	Select the date of the visit.
Visited By	Select the user who visited.

6. Click **Save**.

Chapter 16
Cases and Tasks

About Tracking Cases and Tasks

When it comes to tracking work to determine who is working on issues and what is the status, you can use:

- Cases and tasks
- Only cases
- Or only tasks

What Are Cases?

If you use cases **and** tasks, then the case is your top-level project, and related tasks are the individual items that need to be completed for the project. In this scenario, a task is a child of the parent case. If you only use cases, then all work is tracked and assigned within the case. If you only use tasks, then any all work is tracked and assigned within the task.

For example, to onboard a new employee you could create a case and set the manager as the Assigned To person. Then you would create tasks that make up the project to include processing an I-9 form, setting up the employee benefits plan, and establishing the employee portal credentials. Each task can be worked on concurrently by different team members. This approach helps to delegate the work so that you can streamline the process.

What Are Tasks?

Tasks track individual work items – they can stand on their own or can be a child to a parent case. Tasks are the work items that need to be completed by the Assigned To person. When tasks are a child to a case, then the task can be assigned to the person who owns the case (owns the project) or could be assigned to someone else. Tasks can be standalone or can be subsets to a case.

Tasks are configurable assignment items with an Owner and Assigned To person and defined start and end dates. Tasks are standalone items of work. If you only use tasks with no parent case, then each task needs adequate information to convey what is expected of the Assigned To person. Additionally, if you use tasks only, then you must track each task to ensure that all work items are completed. That is why it may make more sense to create a case and then add tasks for the individual work items. When you have a parent and child relationship, it is easier to monitor the progress of the overall project.

In the scenario of an employee termination, we create a case and then create tasks for the work that must occur, such as payroll and benefits tasks. For example, terminated employees must be closed out of the payroll system, and someone must ensure that the employee receives Cobra information. These items are more suited to tasks – they are part of a larger project, the employee termination case.

If we use a case for the individual pieces of work, we would have to move the case from person to person and reassign the case. With tasks, we can have individual work being performed concurrently for payroll, benefits, risk, and other types of actions – all tracked through the one central location: the case.

Tasks can be:

- Related to a *case*. This is a parent and child relationship.
- Linked to a *workspace*.
- Linked to an associated *dataform*.

Case creation methods

Did you know that you can create cases through multiple methods within ClientSpace? Cases can be added directly from your Home page in the Client Service Cases widget bar, from the Cases dashboard, from the Client Workspace, in the Client Services Cases widget bar, and from many dataforms through the Action Center. Additionally, you can create a case manually, from an email, from the Employee Support Center, and Workflow Channels.

Method	Description
Manually	You can create a case manually from within a client workspace. See Adding cases.
Client Service Cases	Directly from your Home page, in the **Client Service Cases** widget bar.
Cases dashboard	You can create a case manually from the **Cases** dashboard. See Add a Case by Using the Cases Dashboard. Also, if you are using the **Cases** dashboard (not the **Cases-Old** dashboard) you can quickly add a manual case by entering a minimal number of required fields using the Quick Case feature. See Adding a Quick Case.

Method	Description
Client Workspace	From the **Client Workspace**, in the **Client Service Cases** widget bar, click ✚ (Add).
Action Center	From many dataforms through the **Action Center**.
Workspace landing page	From the Case dataform at the bottom of the Workspace landing page.
From an email	**Email Add-in** From an email using the Email Add-in. The subject and body of the email translate to the subject and issue of a case. Cases created from Email Add-in show the **Communication Method** as **Email Add In**. See Creating Activities, Cases, Tasks, and Claim Notes from Outlook. **Email Integration** From a client sending an email to a specific address. A case can be created when an email is sent to an address that is configured for Email Integration with ClientSpace. The subject and body translate to the subject and issue of the case. Cases created from Email Integration show the **Communication Method** as **Email Integration**. The Communication Method field, unless filled in , defaults to Email Integration. The field must be marked as Cloneable on field properties under Dataform management. See the topic *Email Integration* in *ClientSpace Setup & Administration* and the corresponding sub-topics. **Forward an email with Client Number** From a PEO employee forwarding an email with the client number (as CLID=XXX), which routes the email to the client. This approach enables Service Provider users to send an email to an address by including CLID = XXX in the body of the email. This action creates a case in the appropriate client workspace. For more details about using CLID, see *Action Step*, *Creating Email integration aliases*, and *Email Processing* in *ClientSpace Setup & Administration*.

Method	Description
Employee Support Center	You can configure an email template to send an email to the related employee on a case. For example, you can send notifications to external employees who submit an inquiry through the Employee Support Center. Cases created from the Employee Support Center show the **Communication Method** as **Employee Portal**. See the topic *Configuring email templates to notify external employees* in the *ClientSpace Setup & Administration Guide*.
Workflow Channels	You can create cases through Workflow Channels when specific conditions are met, such as a link is clicked or a field has changed. Cases created from a workflow show the **Communication Method** as **Workflow Channel**. See the topic *Workflow Channels* in *ClientSpace Setup & Administration*.

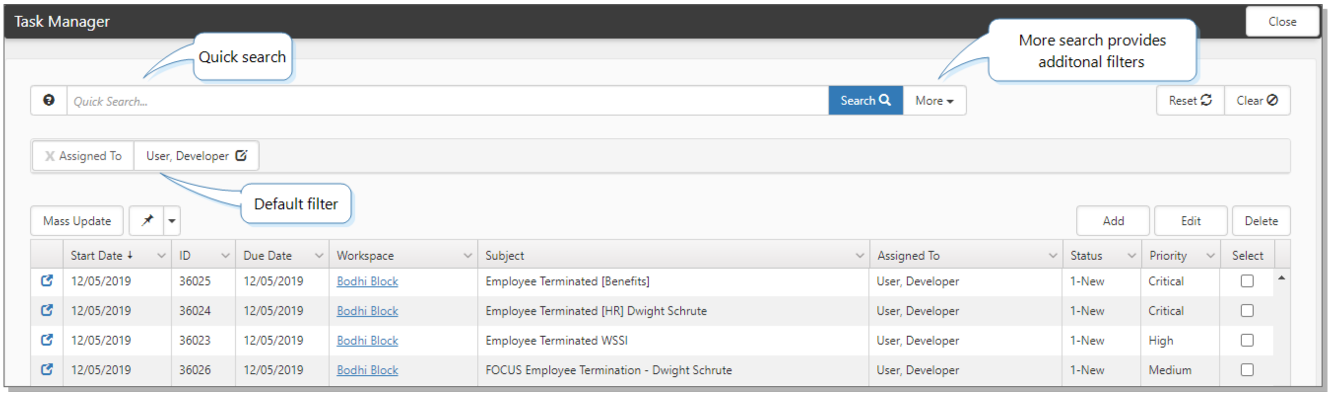
To learn more, watch the video Case Creation Methods.

Searching Cases and Tasks

From the Cases and Tasks dashboards, you can search, view, add, edit, and delete cases and tasks, respectively.

To search cases and tasks:

1. From the modules bar, click **Cases** or **Tasks**, depending on your need.
   The dashboard associated with your selection is displayed. By default, the list reflects active cases or tasks that are assigned to you, the logged-in user.
2. To see only inactive records, in **More** search, set the filter to **Archived**.
3. To see both active and inactive records, in **More** search, set the filter to **All**.
   The filter chiclets reflect your settings. To save your search settings, click (**Save This Search**).



4. To search for a specific case or task, in **Quick Search**, type the number or ID and press **Enter**. This action returns the record if it is Active or Inactive.
5. To further filter the search, click **More**.
6. To clear the filter chiclets, under the Quick Search box, click **X**.

To learn more about using search dashboards, see Search dashboards.

Chapter 17
Managing Cases and Tasks

For case-centric organizations, cases are the primary method for tracking client interactions and issues. Using cases, you can:

- Centralize communications with the client, keeping everyone on the same page.
- Make internal cooperation easier through case reassignment.
- Provide a consistent way of recording client contacts through standardized forms and customizable workflows.
- Always know who is responsible for resolving client issues.

For task-centric organizations, all work is tracked and assigned with the task. Tasks can stand on their own or can be a child to a parent case. Tasks are configurable assignment items with an Owner and Assigned To person and defined start and end dates. If you only use tasks with no parent case, then as work is completed, you can assign the task to the next person. For work that has no dependencies, you can create multiple tasks.

Adding cases

You can add a case through multiple paths in the application. Cases can be added from:

- Your Home page, in the Client Service Cases widget bar.
- Cases dashboard (standard case entry and Quick Case entry)

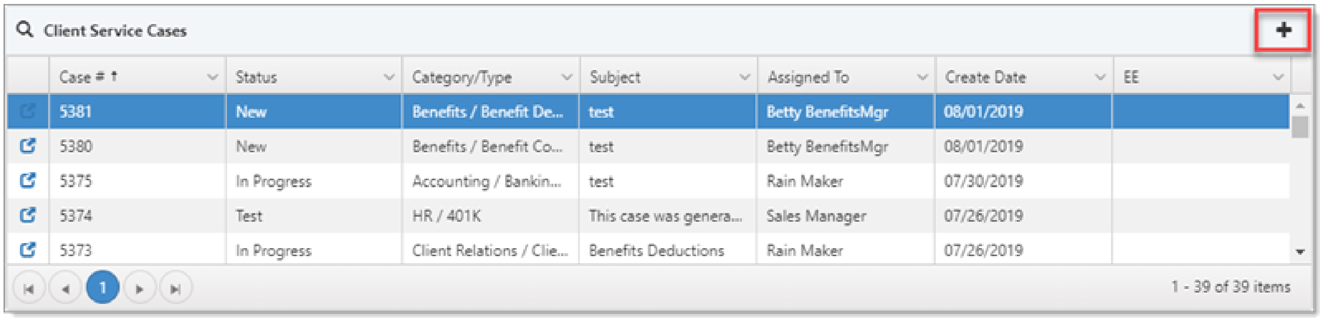
  Note: The Quick Case entry feature is only available on the **Cases** (Cases 2.0) dashboard, not the **Cases-Old** (Cases 1,0) dashboard.
- Client Workspace, in the Client Service Cases widget bar.
- Many dataforms through the Action Center.

To learn about the various case creation methods, see Case creation methods.

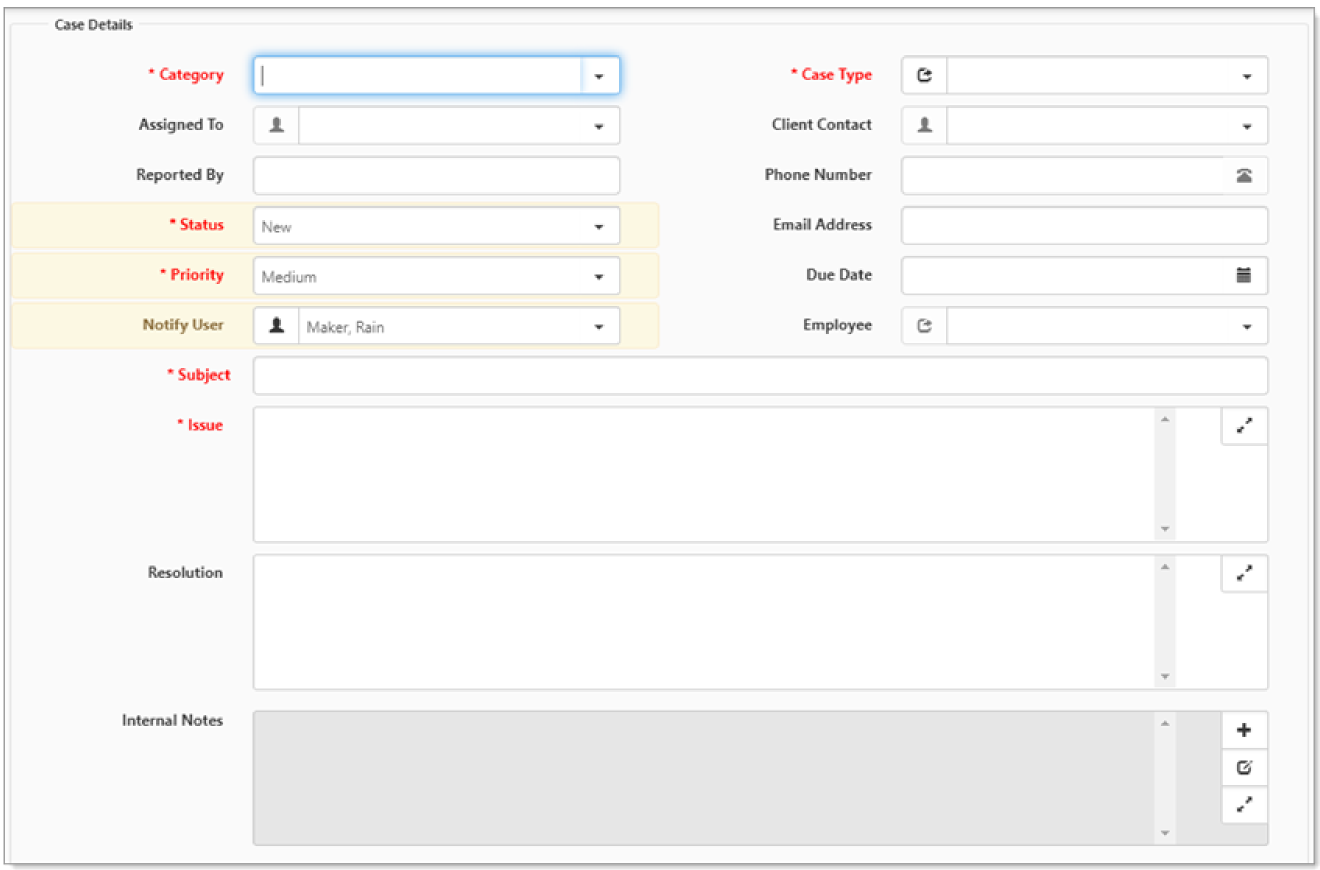
Let's add a case directly from the client workspace through the Client Service Cases widget.

To add a case from the client workspace:

1. Open a client workspace.
2. On the **Client Service Cases** widget bar, click **+**.



The Client Service Case: Add form opens.



3. Complete the form. Required fields are marked in red.

Category	Select a broad classification for this case.
Case Type	Type is a more specific classification for the case. Case Types are filtered by the selected Category. To expedite your selection, this is a typeahead field. You can scroll the list and select a type or start typing and select a match. When the Case Type is selected, a few of the fields are auto-filled.
Assigned To	Auto-filled.
Client Contact	Select the contact for this client.
Reported By	Can be manually typed. Auto-fills when the **Reported By (Employee)** value is added or updated (i.e., Is Dirty). **Note:** • The corresponding **Email Address** and **Phone Number** are auto-filled from the Contact record associated with the **Related By (Employee)** if the related contact record contains this information. Note that clearing the **Reported By (Employee)** field also clears the **Reported By**, **Email Address**, and **Phone Number** fields. • If you do not select a **Reported By (Employee)** but you do select a **Client Contact**, the **Email Address** and **Phone Number** are auto-filled from the selected Contact record if the record contains this information. • If you select both a **Reported By (Employee)** and a **Client Contact**, the **Email Address** and **Phone Number** are auto-filled based on whichever field was completed last.
Phone Number	Auto-filled when you select a Client Contact or when the **Reported By (Employee)** value is added or updated.
Status	**New** is the default. Status is updated when the Workflow Links are selected.
Email Address	Auto-filled when you select a Client Contact or when the **Reported By (Employee)** value is added or updated.
Priority	**Medium** is the default.

Due Date	Auto-filled when Case Type is selected. Else, you can set a due date.
Notify User	Auto-filled with the name of the user completing the form.
Employee	This is where you select the employee that is the reason for the case, such as an employee onboarding or termination request. Employee lookup only includes active employee records. To include inactive employees, begin your search by typing a ~ (tilde). The list then displays inactive records.
Subject	Provide a descriptive subject.
Issue	Provide a detailed description of the issue. Include the communication with the client.
Resolution	Provide what was done to complete the case.
Internal Notes	Provide notes and direction for internal team members. When addressing another team member, begin your comment with their name and change the Assigned To field to that individual.
Case Notes	If applicable, the Case Notes can be used to communicate with other contacts outside of your Organization.
Disable Notifications	When checked, this setting prevents any notifications from sending when the form is saved. This is useful when an edit is applied, and it is unnecessary to notify any subscribers or notification users.
Hours to Complete	Provide hours, If applicable.
Case Num	Auto-filled.
Created By	Auto-filled.
Create Date	Auto-filled with current Date and Time.
Create Time	Auto-filled with current Time.
Level 1 Escalation Date	If applicable, this auto-fills based on the Level 1 Escalation parameters.
Level 1 Escalation Time	If applicable, this auto-fills based on the Level 1 Escalation parameters.
Level 2 Escalation Date	If applicable, this auto-fills based on the Level 2 Escalation parameters.
Level 2 Escalation Time	If applicable, this auto-fills based on the Level 2 Escalation parameters.
Resolution Date	This auto-fills with the Date and Time when the Status changes to

	Complete.
Resolution Time	This auto-fills with the Time when the Status changes to Complete.
Reported By (Employee)	This is the name of the employee who reported the case. **Note:** • When the **Reported By (Employee)** value is added or updated (i.e., Is Dirty), the value is used to auto-fill the **Reported By** (i.e., caller name) field located in the Case Details section. The corresponding **Email Address** and **Phone Number** are also auto-filled from the related Contact record if the Contact record contains this information. Note that clearing the **Reported By (Employee)** field also clears the **Reported By**, **Email Address**, and **Phone Number** fields. • If you do not select a **Reported By (Employee)** but you do select a **Client Contact**, the **Email Address** and **Phone Number** are auto-filled from the selected Contact record if the record contains this information. • If you select both a **Reported By (Employee)** and a **Client Contact**, the **Email Address** and **Phone Number** are auto-filled based on whichever field was completed last. • Additionally, when the **Communication Method** field equals Employee Portal, the **Reported By (Employee)**field becomes "read-only".
Case Audit	Provides a list of user activity within the case.
Communication Method	Select the method by which the client communication originated: Email, Email Add In, Email Integration, Employee Portal, Fax, Other, Phone, Voice Mail, or Workflow Channel. The method is auto-filled and set to read-only for cases created from an Email, Email Integration, Employee Portal, and Workflow Channels.
Active	Enabled by default.

4. Click **Save** to save the case.

Case default assignment

When you assign a case, you can specify the Default Assignment as Creator, Single User, or Client Role.

Default Assignment	Description
Creator	Defaults to the **Assigned To** user on the case, the person that creates the case.
Single User	Defaults to the user selected in **Assigned To User** (fields change depending on the selection in Default Assignment).
Client Role	Enables **Assigned To Field** and **Backup Assigned To**. When you select Client Role, Assign To Field and Backup Assigned To are required. • Backup Assigned To ensures that if the selected client role is not completed on the Client Team dataform, the case type defaults to a meaningful value. • If the Client Team field is empty and the Backup Assigned To has not been set, the Default Assignment reverts to the Manager of the Responsible Department field on the Client Service Case Category metadata associated with the case type.

The system dynamically selects the targeted user based on the Client workspace settings.

Case Escalation

Case Escalation Level 1 and 2 dates and times are set when the case is first saved. Escalation dates get re-set if Priority, Category, or Case Type is changed as this can affect the valid escalation parameters.

These fields are read-only by default but can be editable and secured for more flexibility. As long as the case is open and there are escalation dates and time filled in, this case is found on the Case Escalation Email. Inactivating an Escalation record has no impact on whether the Escalation dates based on that record are set or not.

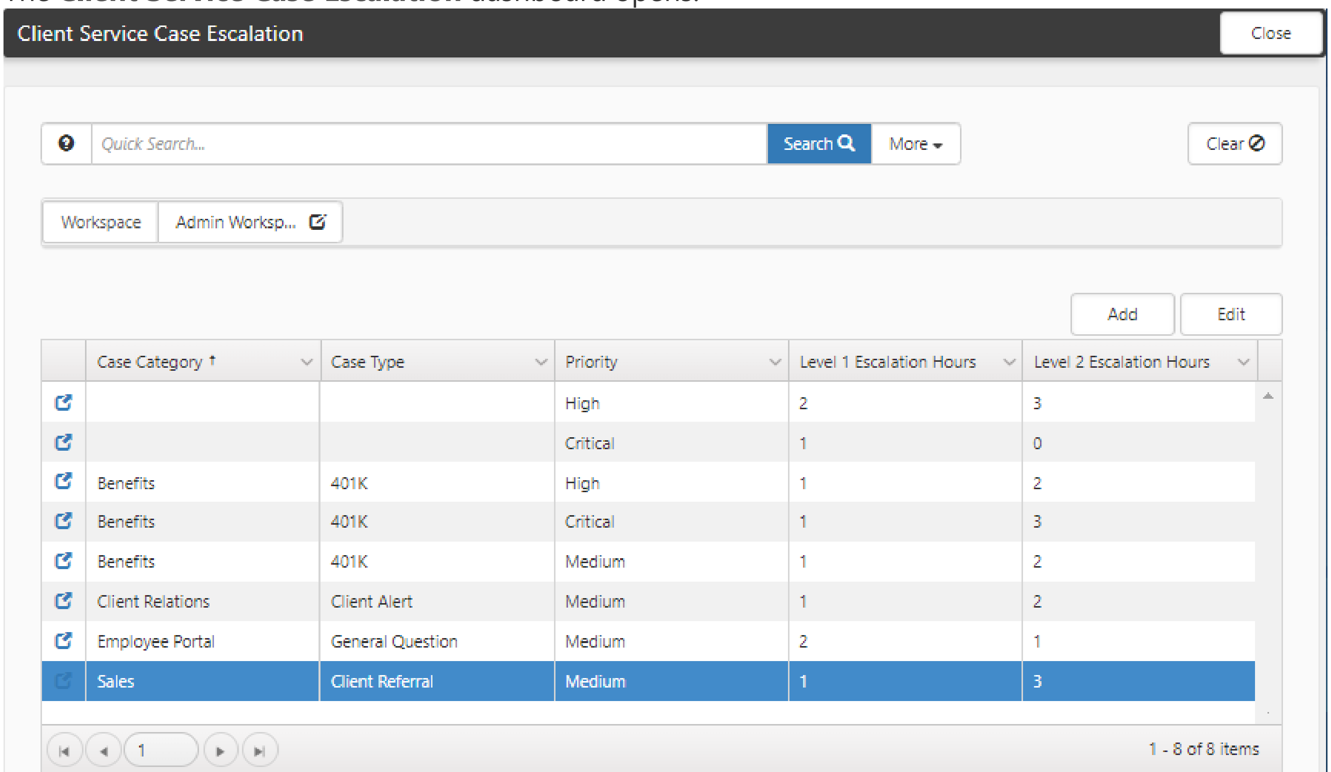
When the Escalation Notification is sent, the following users are included:

- Level 1 Escalation (only if **Include In Case Escalation Email** is cleared)
  - The Assigned To user on the case
  - Members of the Notification Role configured on the associated Case Type
  - Members of the Level 1 Escalation Role on the associated Case Type
- Level 2 Escalation (only if **Include In Case Escalation Email** is cleared)
  - All users included with Level 1 Escalation
  - Members of the Level 2 Escalation Role on the associated Case Type

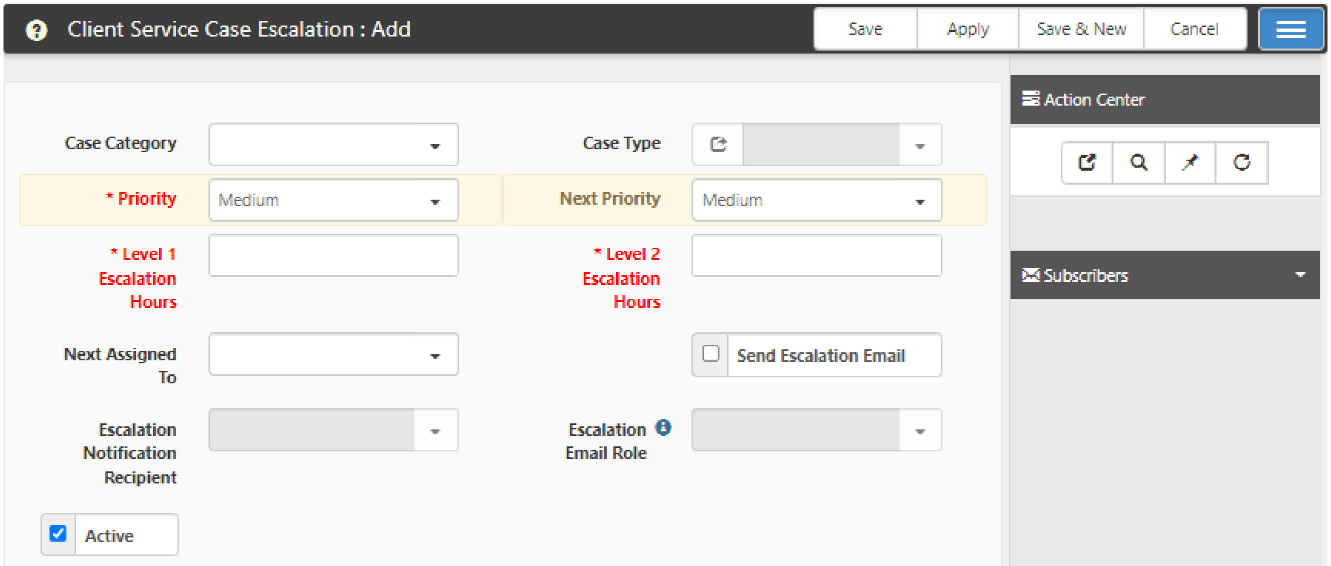
Client Service Case Escalation Parameters

The following procedure illustrates how to configure client service case escalation parameters.

1. Go to **System Admin** > **Administrative Data** > **Client Service Case Escalation**.
   The **Client Service Case Escalation** dashboard opens.



2. To add a set of client service case escalation parameters, click **Add**.
   Or
   To edit a set of client service case escalation parameters, select the entry and click (**Open**) or **Edit**.
   The **Client Service Case Escalation** form opens.



3. Complete the following information on the **Client Service Case Escalation** form:

Field	Description
Case Category	Select a value to indicate the case category of the case to escalate.
Case Type	Select a value to indicate the case category of the case to escalate.
Priority	Select a value to indicate the current priority of the case to escalate.
Next Priority	Select a value to indicate the priority to which the system will set a case when the case escalation triggers.
Level 1 Escalation Hours	Enter a number to indicate the number of hours after a case is created that the system waits before the level 1 escalation of a case. If no action is taken on the case by the Assigned before the indicated number of hours expires, the system completes the level 1 escalation.
Level 2 Escalation Hours	Enter a number to indicate the number of hours after a case is created that the system waits before the level 2 escalation of a case. If no action is taken on the case by the Assigned before the indicated number of hours expires, the system completes the level 2 escalation.
Next Assigned To	The **Next Assigned To** field uses the **CaseEscalationNextAssignedTo** lookup group to define the acceptable values for this field. The values include the following: ◦ Single User ◦ Client Team Role ◦ Department Manager ◦ Immediate Supervisor

Field	Description
	When a Global Admin user selects: ◦ **Single User** in the **Next Assigned To** field, the system will display the **Next Assigned To User** field on the dataform. ◦ **Client Team Role** in the **Next Assigned To** field, the system will display the **Client Team Role** field on the dataform. ◦ **Department Manager** or **Immediate Supervisor** in the **Next Assigned To** field, the system will determine the manager or supervisor for the user indicated in the **Assigned To** field on the case. The system uses the user's profile to determine the user in the role of the department manager or immediate supervisor. When the case escalation triggers, the system assigns the case to: ▪ The manager user if the **Next Assigned To** field contains **Department Manager** ▪ The supervisor user if the **Next Assigned To** field contains **Immediate Supervisor**.
Next Assigned To User	This field displays when the **Next Assigned To** field contains **Single User**. A Global Admin user can select a user in the **Next Assigned To User** field to indicate the individual to whom the system will assign the client service case. When the case escalation triggers, the system assigns the case to the user indicated in the **Next Assigned To User** field. **Note:** This field does not display when the Next Assigned To field contains **Department Manager** or **Immediate Supervisor**.
Client Team Role	This field displays when the **Next Assigned To** field contains **Client Team Role**. The Global Admin user can select a client team role in this field to indicate the individual in a role to whom the system will assign the client service case. The system uses the **Client Team Roles** lookup group to define the values for this field. When the case escalation triggers, the system assigns the case to the user in the indicated role. **Note:** This field does not display when the Next Assigned To field contains **Department Manager** or **Immediate Supervisor**.
Send Escalation Email	This check box indicates whether the system sends an email notification when the system escalates a case by using this set of client service case escalation parameters.
Escalation	This field is available when the **Send Escalation Email** check box is selected. Select

Field	Description
Notification Recipient	one of the following values to indicate the type of user to whom the system sends a notification about a case escalation: ◦ Role ◦ Department Manager ◦ Immediate Supervisor
Escalation Email Role	This field is available when the **Escalation Notification Recipient** field contains **Role**. Select a user role in the **Escalation Email Role** field to indicate the user role to whom the system notifies about a case escalation.

4. Click **Save**.

Case notification

Case communication is important because it keeps everyone on the same page, maintains a consistent information trail, and gives you one place to find information about an issue or client communication. When you save changes to a case, all subscribers automatically receive an email about the change. The integration of cases with communication saves you a step of recording the discussion in the case and then recording it again in an email. By consistently using case communications, you can create reports that paint a picture of how many and what types of requirements each client may have.

When a case is created or modified, the following users receive notifications of the change:

- The **Assigned To** user on the case.
- Any **Notify User** specified on the case.
- Members of the **Notification Role** configured on the associated Case Type.
- Users that have subscribed to that **Case Type**, **Workspace**, or **Case**.
  - External Case Creators always have access to view the cases they create, if the Case Type remains one that is exposed to external users.
  - The list of users available for Case Type Subscription comprises Global Admins and any user that is in a role with Edit rights to the **gen_AdminCaseTypes** form.
- Admin-level users of associated Department role for the **Assigned To** user (on critical case when it is being created.)

To disable the notification:

- Select the **Disable Notifications** option.

When a critical case is logged

When a Critical Case is logged, the scheduled process **CriticalCaseNotification** sends an email to the Assigned To user as well as the Manager of the Assigned To user's Primary Department. Any users in the Department Admin role receive these notifications, regardless of whether the user account is Active.

ServiceCaseNotification sends an escalation case report to users in a role that has the **biz_ClientServiceCase_Email_Notifications** entity. Cases with the **Include In Case Escalation Email** option disabled (cleared), are ignored by this Scheduled Process. The ServiceCaseNotification scheduled process needs to be configured to fire at or less than the lowest escalation time, otherwise, you can create cases with 1 hour escalations but the notifications only queue up for the next run of the scheduled process.

Learning how: Creating a case

This video demonstrates how to create a case.

Video

Watch the video about Cases: Case Overview Part 1.

Learning how: Case notifications

This video demonstrates how cases are used to centralize communications and includes:

- Adding notifications
- Reassigning a case

Video

Watch the video about Case Overview Part 2.

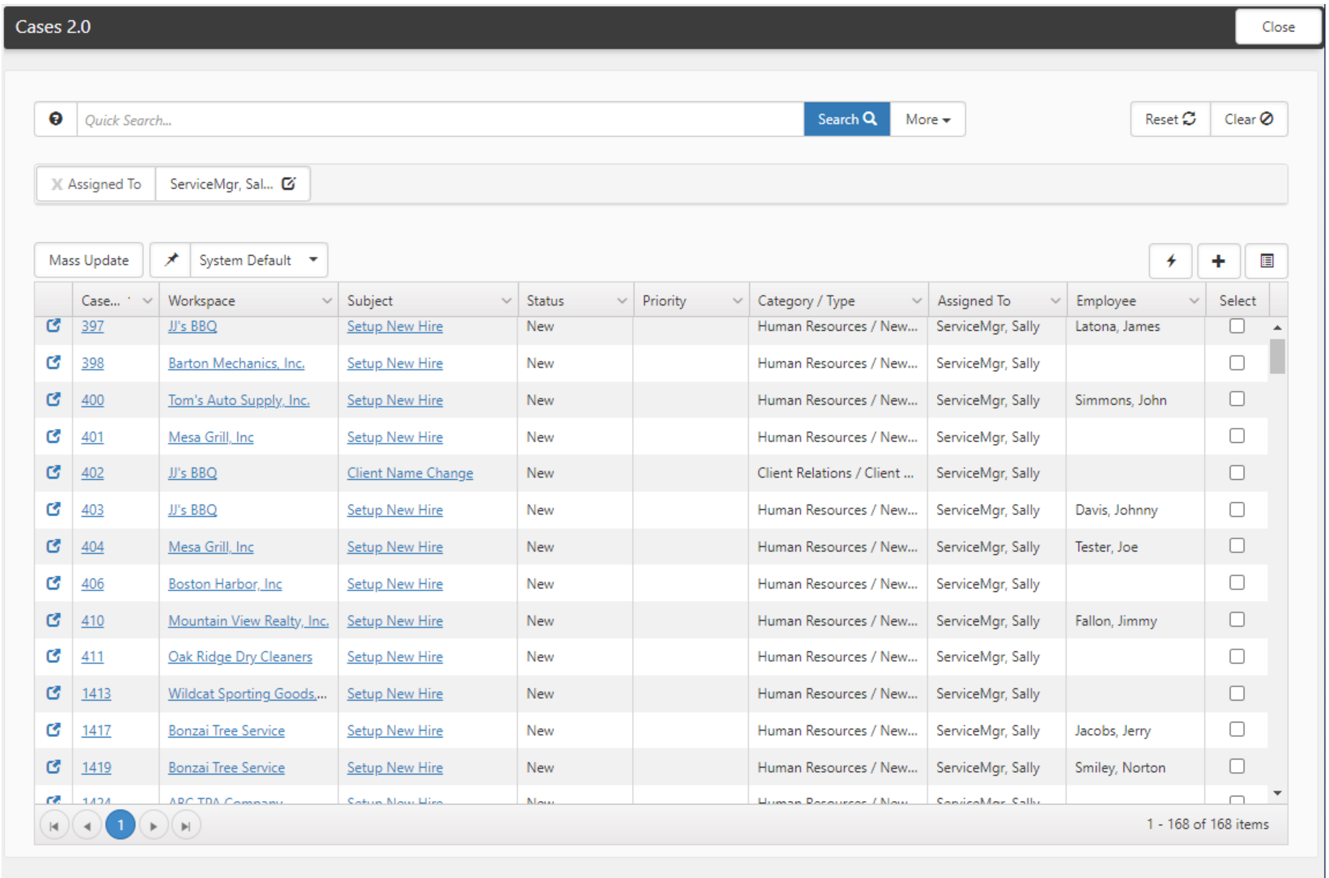
Cases Dashboard

Use the **Cases** (Cases 2.0) or **Cases-Old** (Cases 1.0) dashboard to manage cases. A user can:

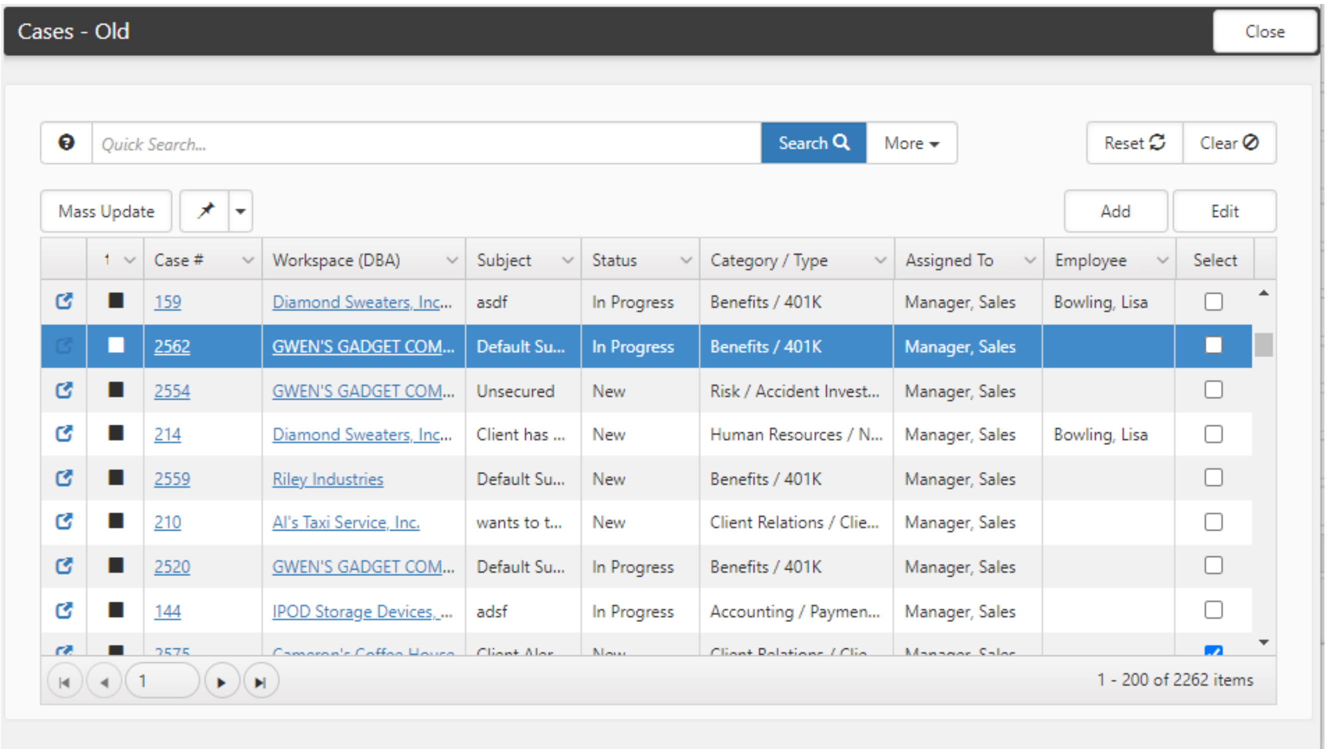
- Search for one or more cases
- Add a case
- Add a Quick Case using a minimal number of required fields (on the **Cases** dashboard)
- Edit a case (for example, to reassign a case or update information)

- Mass update cases
- Review the status of one or more cases (on the **Cases-Old** dashboard)
- Reactivate a case
- View a case summary (on the **Cases** dashboard)

The following graphic illustrates the **Cases** dashboard.



The following graphic illustrates the **Cases-Old** dashboard.



Search for Cases from the Cases Dashboard

Use the **Quick Search** and/or **More** search options to filter the list of cases on the **Cases** or **Cases-Old** dashboard.

To search for cases:

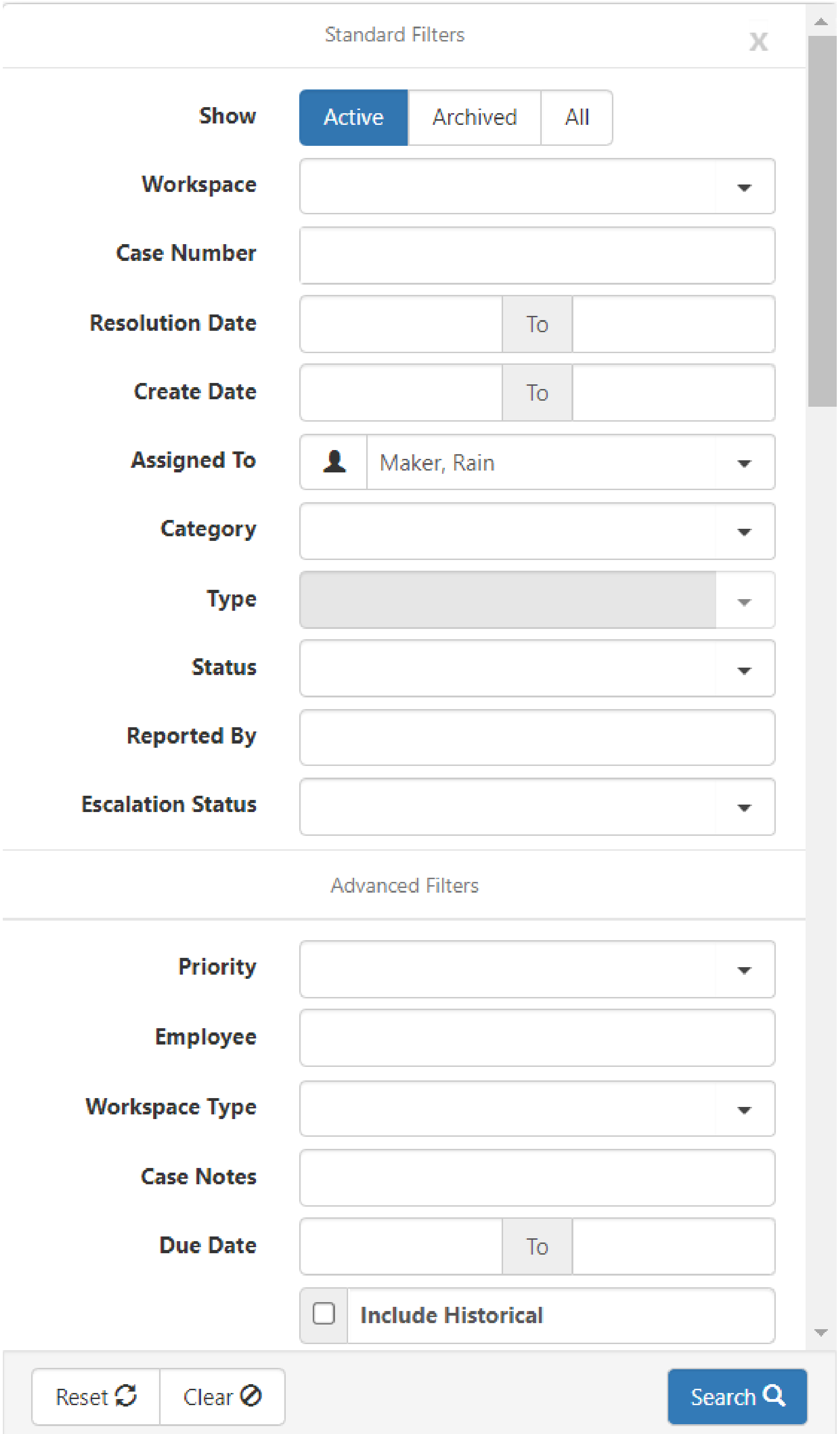
Search for cases by using the Quick Search or More search options to filter the list of cases.

1. In the modules bar, select **Cases** or select **Cases Module Old**.
   A list of Cases displays.

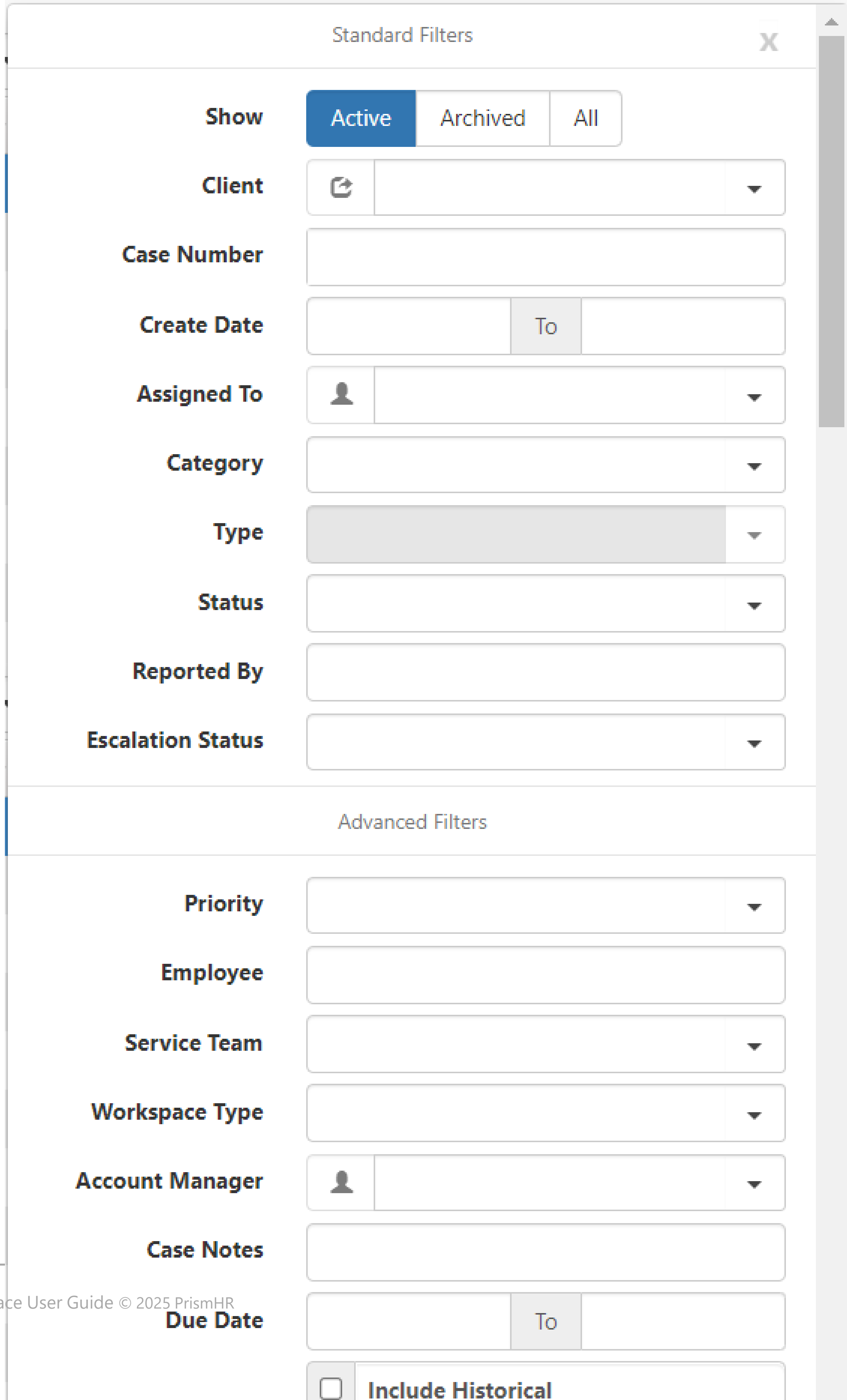
2. Use the **Quick Search** to quickly filter the list of values that display on the dashboard.
   The Quick Search options are different for the **Cases** dashboard and the **Cases-Old** dashboard
   - Quick Search options for **Cases** dashboard
     - Enter a value in the **Quick Search** field. You can search for the following values:
       - Workspace Name (Starts with)
       - Case Number (Equals)
       - Subject (% Search for Contains)
       - Issue (% Search for Contains)
       - Resolution (% Search for Contains)
     - Press **Enter** or click the **Search** button.
       The system displays the search results.
   - Quick Search options for **Cases-Old** dashboard
     - Enter a value in the **Quick Search** field. You can search for the following values:
       - Workspace Name (Starts with)
       - Organization Name (Starts with)
       - DBA Name (Starts with)
       - Case Number (Equals)
       - Client Number (Equals)
       - Category (Starts with)
       - Status (Starts with)
       - Subject (% Search for Contains)
       - Issue (% Search for Contains)
       - Resolution (% Search for Contains)
     - Press **Enter** or click the **Search** button.
       The system displays the search results.

   See Quick Search for more information.

3. Use the **More** search to use additional filters to further filter the list of values that display on the dashboard.
   - Click **More** to display the list of search filters.
     The following graphic illustrates the Standard and Advanced Filters for use when searching for cases in the **Cases** dashboard.


Standard Filters
x
Show
Active
Archived
All
Workspace
Case Number
Resolution Date
To
Create Date
To
Assigned To
Maker, Rain
Category
Type
Status
Reported By
Escalation Status
Advanced Filters
Priority
Employee
Workspace Type
Case Notes
Due Date
To
Include Historical
Reset
Clear
Search

The following graphic illustrates the Standard and Advanced Filters for use when searching for cases in the **Cases-Old** dashboard.


Standard Filters
X
Show
Active
Archived
All
Client
Case Number
Create Date
To
Assigned To
Category
Type
Status
Reported By
Escalation Status
Advanced Filters
Priority
Employee
Service Team
Workspace Type
Account Manager
Case Notes
Due Date
To
Include Historical

- Enter or select a value in one or more filter fields.
- Press **Enter** or click the **Search** button.
  The system displays the search results.

See More Search for more information.

4. Review the search results.
5. (Optional) To change the column view, click (**Columns**).
   A list of available columns displays. Select or deselect a check box to add or remove the columns to display in the search results. You can select from the following columns in the Cases Dashboard:
   - Case #
   - Workspace
   - Subject
   - Status
   - Priority
   - Category / Type
   - Assigned To
   - Employee
   - Reported By
   - Create Date
   - Due Date
   - Resolution Date
   - Select
6. (Optional) Repeat steps 2 and 3 to further refine the search results.

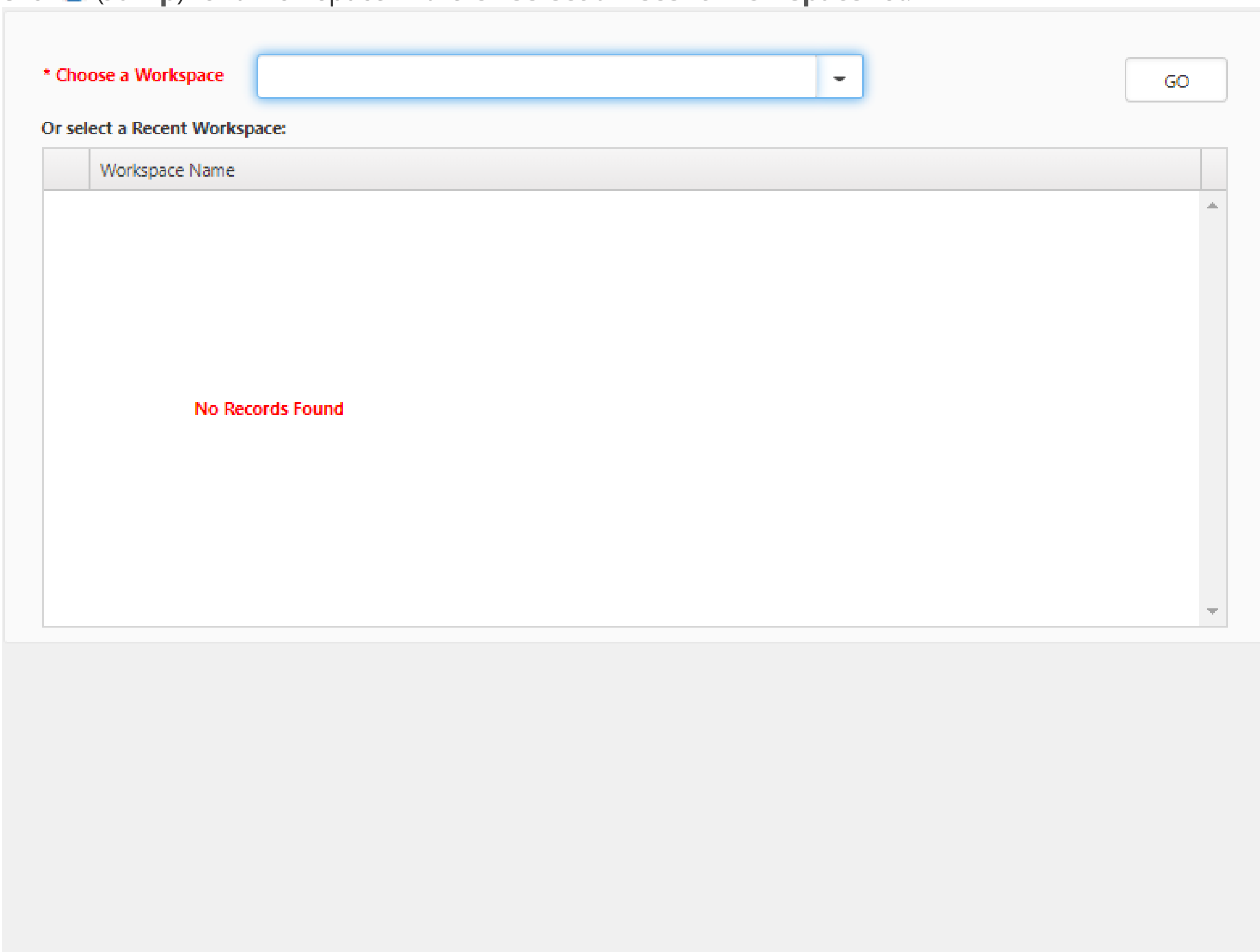
Add a Case by Using the Cases Dashboard

You can add a case by using the **Cases** (Cases 2.0) or **Cases-Old** (Cases 1.0) dashboard.

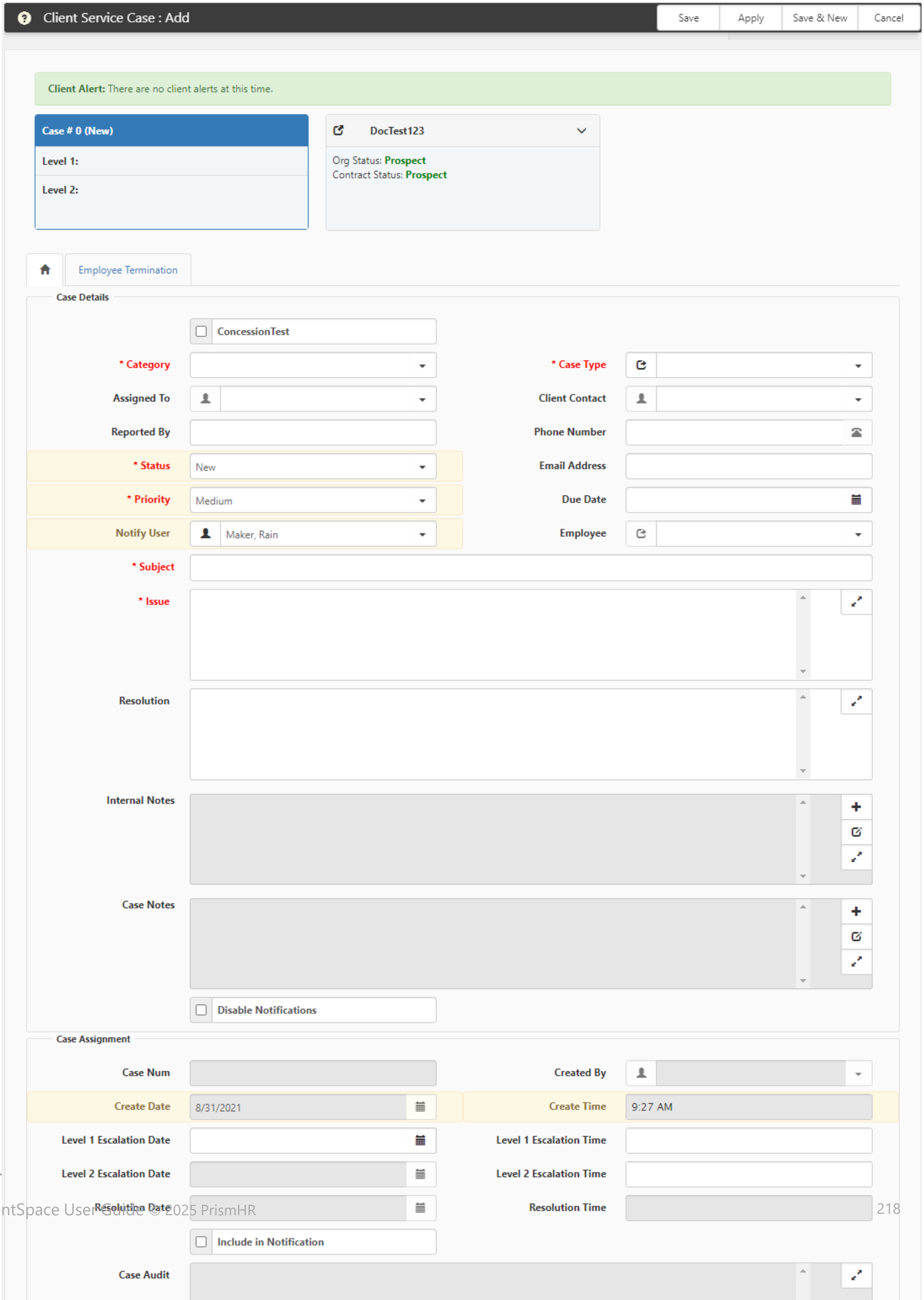
> You can also add a Quick Case from the **Cases** dashboard (not the **Cases-Old** dashboard) with minimal data entry of required fields. You can return to the case record later and enter additional information as necessary. For more details on adding a Quick Case, refer to Adding a Quick Case.

To add a case:

1. In the modules bar, select **Cases** or select **Cases Module Old**.
   A list of Cases displays.
2. Click the **Add** button.
3. Select a workspace in the **Choose a Workspace** field and click the **GO** button.
   Or
   Click (**Jump**) for a workspace in the **Or select a Recent Workspace** list.



The **Client Service Case: Add** page displays.


Client Service Case : Add
Save
Apply
Save & New
Cancel
Client Alert: There are no client alerts at this time.
Case # 0 (New)
Level 1:
Level 2:
DocTest123
Org Status: Prospect
Contract Status: Prospect
Employee Termination
Case Details
ConcessionTest
* Category
* Case Type
Assigned To
Client Contact
Reported By
Phone Number
* Status
New
Email Address
* Priority
Medium
Due Date
Notify User
Maker, Rain
Employee
* Subject
* Issue
Resolution
Internal Notes
Case Notes
Disable Notifications
Case Assignment
Case Num
Created By
Create Date
8/31/2021
Create Time
9:27 AM
Level 1 Escalation Date
Level 1 Escalation Time
Level 2 Escalation Date
Level 2 Escalation Time
Resolution Date
Resolution Time
Include in Notification
Case Audit

4. Complete the information in the **Case Details** section. Required fields are marked in red.
   The following table outlines the fields in the **Case Details** section.

Category	Select a broad classification for this case.
Case Type	Type is a more specific classification for the case. Case Types are filtered by the selected Category. To expedite your selection, this is a typeahead field. You can scroll the list and select a type or start typing and select a match. When the Case Type is selected, a few of the fields are auto-filled.
Assigned To	Auto-filled.
Client Contact	Select the contact for this client.
Reported By	Can be manually typed. Auto-fills when the **Reported By (Employee)** value is added or updated (i.e., Is Dirty). **Note:** ◦ The corresponding **Email Address** and **Phone Number** are auto-filled from the Contact record associated with the **Related By (Employee)** if the related contact record contains this information. Note that clearing the **Reported By (Employee)** field also clears the **Reported By**, **Email Address**, and **Phone Number** fields. ◦ If you do not select a **Reported By (Employee)** but you do select a **Client Contact**, the **Email Address** and **Phone Number** are auto-filled from the selected Contact record if the record contains this information. ◦ If you select both a **Reported By (Employee)** and a **Client Contact**, the **Email Address** and **Phone Number** are auto-filled based on whichever field was completed last.
Phone Number	Auto-filled when you select a Client Contact or when the **Reported By (Employee)** value is added or updated.
Status	**New** is the default. Status is updated when the Workflow Links are selected.

Email Address	Auto-filled when you select a Client Contact or when the **Reported By (Employee)** value is added or updated.
Priority	**Medium** is the default.
Due Date	Auto-filled when Case Type is selected. Else, you can set a due date.
Notify User	Auto-filled with the name of the user completing the form.
Employee	This is where you select the employee that is the reason for the case, such as an employee onboarding or termination request. Employee lookup only includes active employee records. To include inactive employees, begin your search by typing a **~** (tilde). The list then displays inactive records.
Subject	Provide a descriptive subject.
Issue	Provide a detailed description of the issue. Include the communication with the client.
Resolution	Provide what was done to complete the case.
Internal Notes	Provide notes and direction for internal team members. When addressing another team member, begin your comment with their name and change the Assigned To field to that individual.
Case Notes	If applicable, the Case Notes can be used to communicate with other contacts outside of your Organization.
Disable Notifications	When checked, this setting prevents any notifications from sending when the form is saved. This is useful when an edit is applied, and it is unnecessary to notify any subscribers or notification users.
Hours to Complete	Provide hours, If applicable.
Case Num	Auto-filled.
Created By	Auto-filled.
Create Date	Auto-filled with current Date and Time.
Create Time	Auto-filled with current Time.

Level 1 Escalation Date	If applicable, this auto-fills based on the Level 1 Escalation parameters.
Level 1 Escalation Time	If applicable, this auto-fills based on the Level 1 Escalation parameters.
Level 2 Escalation Date	If applicable, this auto-fills based on the Level 2 Escalation parameters.
Level 2 Escalation Time	If applicable, this auto-fills based on the Level 2 Escalation parameters.
Resolution Date	This auto-fills with the Date and Time when the Status changes to Complete.
Resolution Time	This auto-fills with the Time when the Status changes to Complete.
Reported By (Employee)	This is the name of the employee who reported the case. **Note:** ◦ When the **Reported By (Employee)** value is added or updated (i.e., Is Dirty), the value is used to auto-fill the **Reported By** (i.e., caller name) field located in the Case Details section. The corresponding **Email Address** and **Phone Number** are also auto-filled from the related Contact record if the Contact record contains this information. Note that clearing the **Reported By (Employee)** field also clears the **Reported By**, **Email Address**, and **Phone Number** fields. ◦ If you do not select a **Reported By (Employee)** but you do select a **Client Contact**, the **Email Address** and **Phone Number** are auto-filled from the selected Contact record if the record contains this information. ◦ If you select both a **Reported By (Employee)** and a **Client Contact**, the **Email Address** and **Phone Number** are auto-filled based on whichever field was completed last. ◦ Additionally, when the **Communication Method** field equals Employee Portal, the **Reported By (Employee)**field becomes "read-only".

Case Audit	Provides a list of user activity within the case.
Communication Method	Select the method by which the client communication originated: Email, Email Add In, Email Integration, Employee Portal, Fax, Other, Phone, Voice Mail, or Workflow Channel. The method is auto-filled and set to read-only for cases created from an Email, Email Integration, Employee Portal, and Workflow Channels.
Active	Enabled by default.

5. Update the information in the **Case Assignment** section as necessary.
6. Click the **Save** button.
   Or
   Click the **Save & New** button.

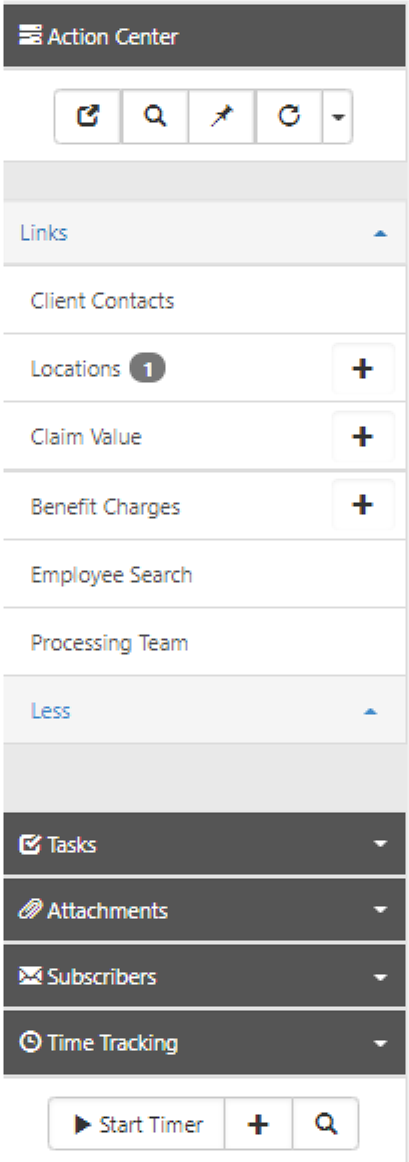
Edit a Case by Using the Cases Dashboard

You can edit a case by using the **Cases** or **Cases-Old** dashboard.

To edit a case:

1. In the modules bar, select **Cases** or select **Cases Module Old**.
   A list of Cases displays.
2. (Optional) Use the **Quick Search** and/or **More** search options to filter the items that display in the dashboard.
3. To edit an existing case:
   - Locate the entry and click (**Jump**).
   - Or
   - Select a row and click the **Edit** button
4. Update the information in the **Case Details** section as necessary.
5. Update the information in the **Case Assignment** section as necessary.

6. (Optional) Complete one or more Action Items in the **Action Center**.
   The following graphic illustrates the Action Items available in the Action Center for an unemployment insurance claim.



7. Click the **Save** button.

Adding a Quick Case

Use the **Quick Case** feature to quickly add a case using a minimum number of required fields.

Once a Quick Case is saved, it displays in the Cases dashboard with the **Communication Method** field on the Client Service Case record auto-populated as "Quick Case". It also displays in the Client Service Cases widget. You can open an active case to add more information as you receive it.

The Quick Case feature can be accessed from three locations in ClientSpace:

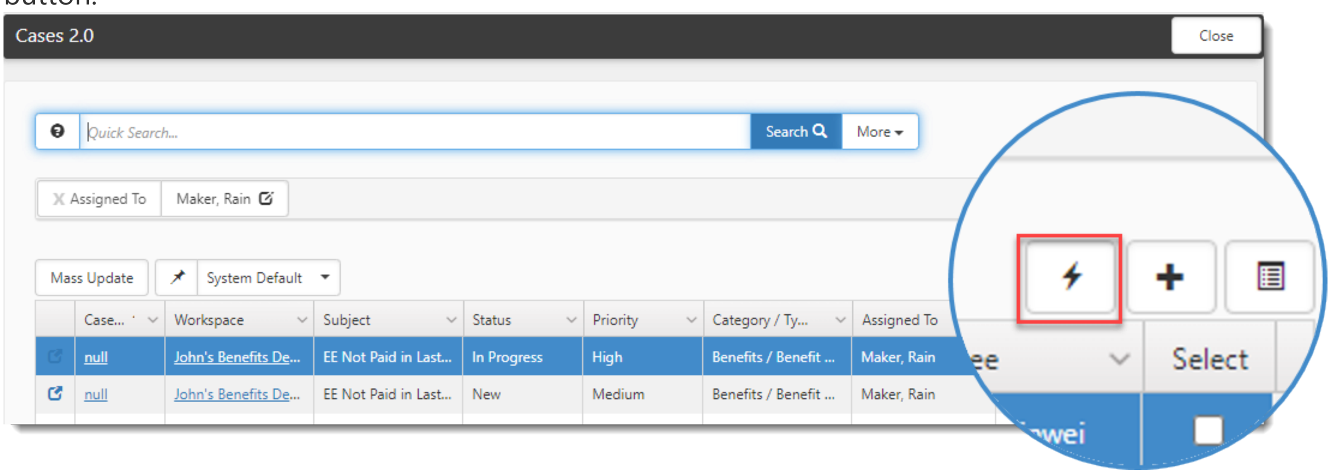
- The **Cases** (Cases 2.0) dashboard
- The **Quick Case** link in the Workspace Action Center
  Note: The **Quick Case** Workspace Action Center link must be enabled by a global administrator.
- The Client Services Cases widget on the Workspace landing page

Note: To access Quick Case from any of these locations, a user must be in a role with the biz_ ClientServiceCase_QuickCase security entity.

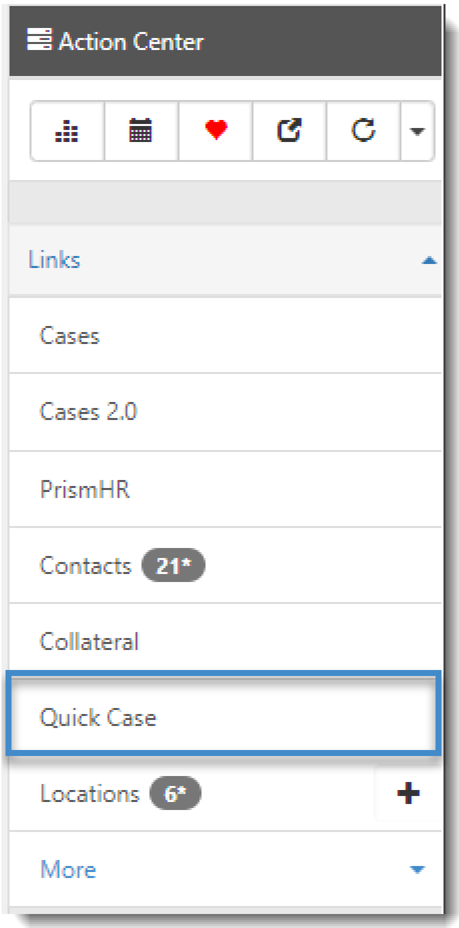
Cases Dashboard or Action Center

To add a Quick Case from the Cases dashboard or the Workspace Action Center:

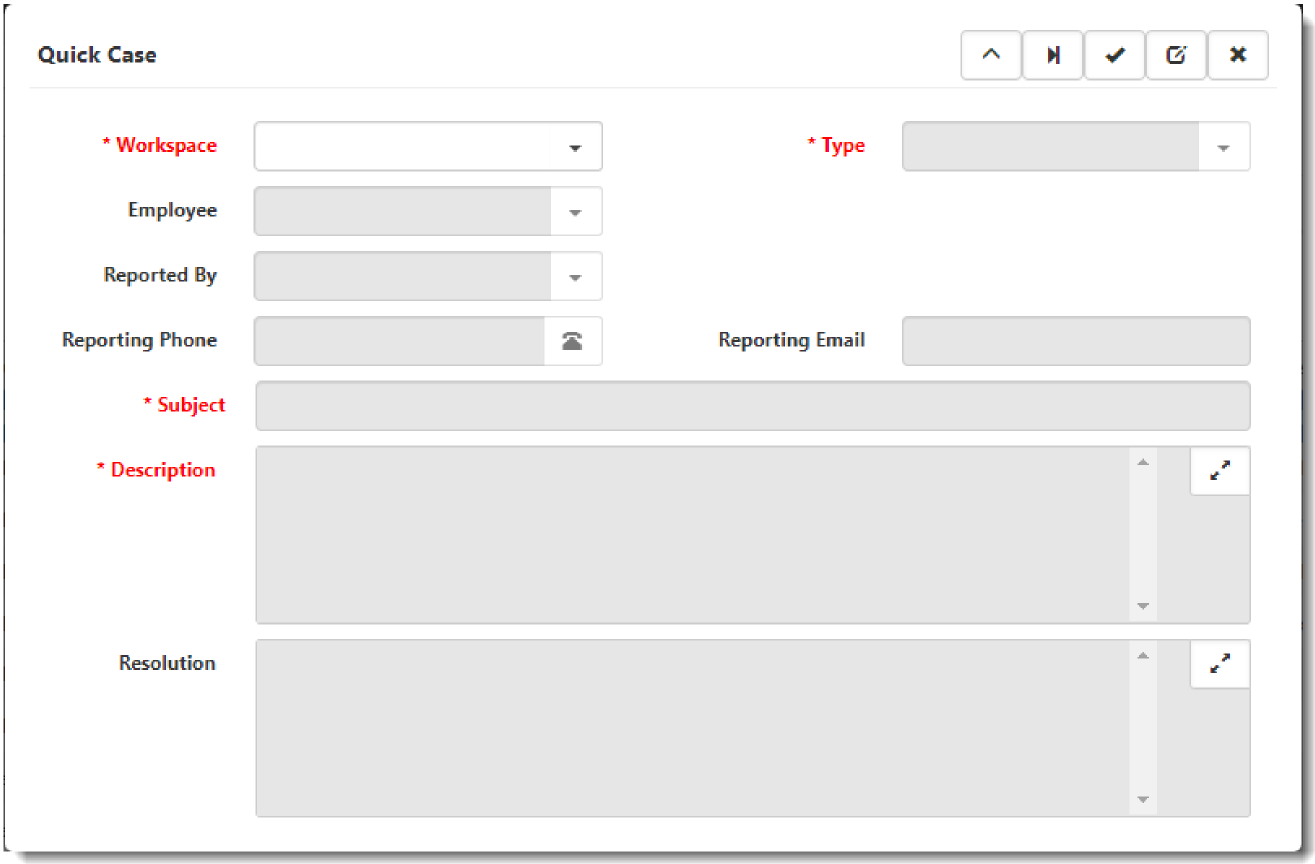
1. **From the Cases Dashboard:** In the modules bar, select **Cases** and click the **Quick Case**  button.



From a Workspace landing page: In the Action Center under **Links**, select the **Quick Case** link:

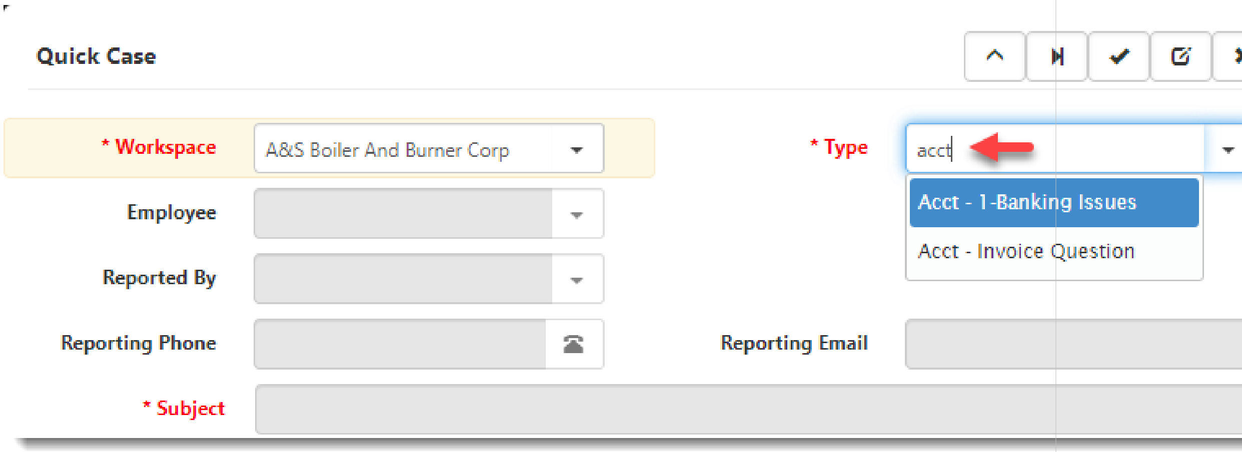


The Quick Case popup window displays.



2. Complete the form. Required fields are marked in red.

Workspace	Select an associated workspace. (This field auto-fills with the workspace name when you use the **Quick Case** link on the Workspace landing page to launch the Quick Case popup window or when you access Quick Case through the Client Service Cases widget.)
Type	Select a Client Service Case type in the **Type** field. **Type** is a more specific classification for the case and is a typeahead field. Typeahead fields expedite your selection by allowing you to type the first few letters of a value and filter the list to matching entries before making a selection. Alternatively, you can scroll through the list and select a value without filtering it. **Note:** • Only case types with a check mark in the **Expose Case Type to Quick Case** field on the Client Service Case Type record display in the list.

	• If you have set a **Short Name** on the Client Service Case Category Metadata form for any of your case type categories, you can type the first few letters of the **Short Name** to filter the selection list and display only case types associated with that category. In the example below, the Banking Issues and Invoice Question case types both have a category of Accounting and the Accounting category has been assigned a **Short Name** of "Acct". The **Short Name** is appended to the front of the case type in the **Type** lookup list and typing "acct" in the **Type** field filters the selections that begin with the "Acct" short name: 
Employee	If applicable, select the employee related to the case. For example, if you are entering a request related to an employee's onboarding, select the employee being onboarded. Use the typeahead search to enter a few letters of the employee name to filter the list if necessary. **Note:** • Only Active employees display by default. To search for an Inactive employee, begin your typeahead search by typing a tilde (~). • Whether the **Employee** field is optional or required varies by the case type selection in the **Type** field. If **Require Employee** is checked on the Client Service Case Type record for the selected case type, **Employee** is a required field.
Reported By	Optionally, select a "reported by" category: • Employee - Select an existing employee in ClientSpace. The **Reporting Employee**, **Reporting Phone**, and **Reporting Email** fields display. • Client Contact - Select an existing employee in ClientSpace. The **Reporting Contact**, **Reporting Phone**, and **Reporting Email** fields display. • Contact Information - Select this option if the contact is a new contact that is not

	yet entered in ClientSpace. The **Reporting Name**, **Reporting Phone**, and **Reporting Email** fields display.
Reporting Employee, Reporting Contact, Reporting Name.	This field corresponds to your selection in the **Reported By** field. Selecting Employee or Client Contact in **Reported By** auto-fills the **Reporting Phone** and **Reporting Email** fields if this information is entered on the employee or contact record in ClientSpace.
Reported Phone	If the **Reported By** selection is Employee and the employee's work phone number is entered on the employee record OR if the **Reported By** selection is Client Contact and the contact's phone number is entered on contact record, the phone number auto-fills. Otherwise, enter the phone number of the reporting individual. **Note:** The **Reported Phone** must always be manually entered if the **Reported By** selection is Contact Information since this selection represents a new contact not yet entered in ClientSpace.
Reported Email	If the **Reported By** selection is Employee and the employee's work email address is entered on the employee record OR if the **Reported By** selection is Client Contact and the contact's email address is entered on contact record, the email address auto-fills. Otherwise, enter the email address of the reporting individual. **Note:** The **Reported Email** must always be manually entered if the **Reported By** selection is Contact Information since this selection represents a new contact not yet entered in ClientSpace.
Subject	If the case type chosen has a default subject associated with it, it will default here. Otherwise, enter a case subject.
Description	If the selected case type (i.e., **Type**) has a default issue associated with it, it will default here. Otherwise, enter a case issue/description.
Resolution	Enter a case resolution if you are saving the case as a completed case in step 4 below. (**Resolution** is required to save the case as a completed case.)

3. Select a save (or cancel) option from the Quick Case toolbar as appropriate.

Icon	Tooltip Text	Description
	New	Creates and saves a new case containing the Quick Case details and places it in **New** status.
	In Progress	Creates and saves a new case containing the Quick Case details and places it in **In Progress** status.
	Complete Case	Creates and saves a new case containing the Quick Case details and places it in **Complete** status and sets the case record to Inactive. **Note:** A **Resolution** is required for this option.
	Go to full form	Creates and saves a new case containing the Quick Case details, places it in **New** status, and opens the case in the Client Service Case record form.
	Cancel	Aborts Quick Case entry. Closes the Quick Case form without saving.

4. If you selected a "save" option, select **Yes** on the confirmation message to proceed with saving your work. If you selected **Cancel**, select **Yes** on the confirmation message to exit without saving.

   Upon saving, the following occurs:

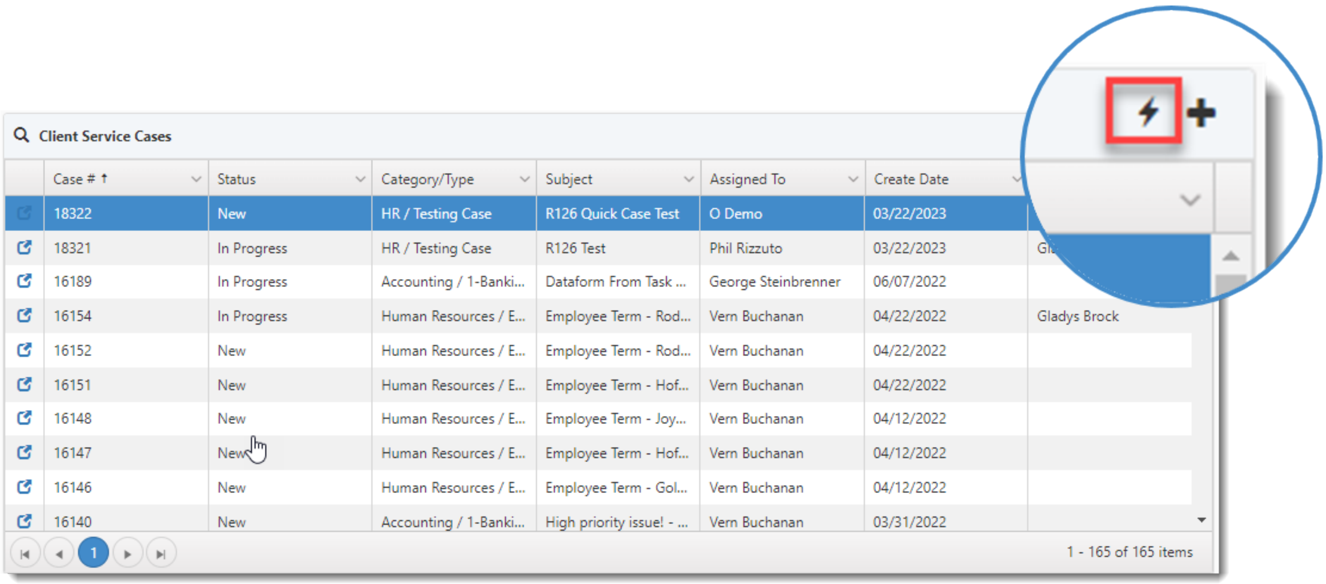
- Your new Client Service Case is added and is accessible from the Cases dashboard and the Client Workspace.
- The **Communication Method** field of the Client Service Case record is automatically set to "Quick Case".
- Applicable Client Service Case business logic rules are honored and applied. (Hard and soft errors related to Client Service Cases are not currently honored.) For instance, if there are case type business rules set to apply a default case priority or a due date offset, those business rules are applied to any Client Service Case record created using the Quick Case dataform.

> If you are adding a case in **Complete** status, to see the case, you may need to edit your Cases dashboard or Client Service Cases widget filter settings to display Inactive cases if Inactive cases are hidden.

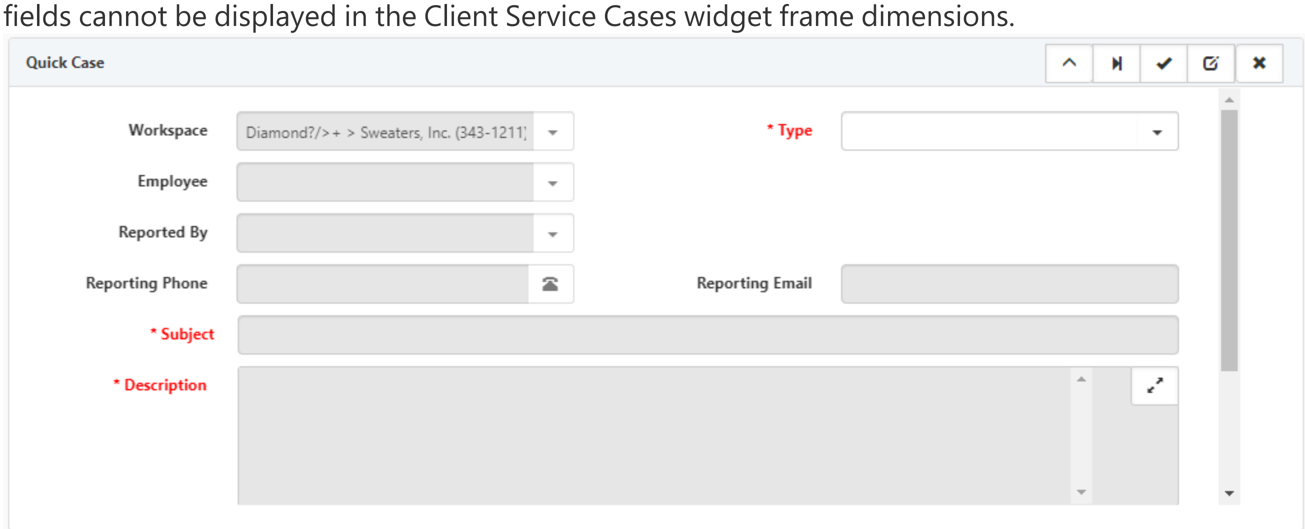
Client Service Cases Widget

To add a Quick Case from the Client Service Cases Widget:

1. On a Workspace landing page, in the Client Service Cases widget header, click the **Add Quick Case** icon.



The Quick Case modal window displays in the Client Service Cases widget frame. The Workspace field is auto-filled with the current workspace name. Scroll bar(s) may be visible if all Quick Case fields cannot be displayed in the Client Service Cases widget frame dimensions.



2. Complete the form. Required fields are marked in red. Refer to the table in step three of the preceding section for field definitions.

3. Select a save (or cancel) option from the Quick Case toolbar as appropriate. Refer to the table in step four of the preceding section for Save and Cancel option definitions.
4. Click the **Quick Case** button.
5. If you selected a "save" option, select **Yes** on the confirmation message to proceed with saving your work. If you selected **Cancel**, select **Yes** on the confirmation message to exit without saving. Upon saving, the following occurs:
   - If you set an initial case disposition of **New**, **In Progress**, or **Complete** OR you selected **Cancel** , the Client Service Cases widget refreshes to display the original view of Client Service Cases.
   - If you selected **Go To Full form** , the Client Service Case opens in a separate window. Note that clicking the workspace name in the **Work Center** menu area to view the Client Service Case widget again displays the original view of Client Service Cases.
   - Your new Client Service Case is added and is accessible from the Cases dashboard and the Client Workspace.
   - The **Communication Method** field of the Client Service Case record is automatically set to "Quick Case".
   - Applicable Client Service Case business logic rules are honored and applied. (Hard and soft errors related to Client Service Cases are not currently honored.) For instance, if there are case type business rules set to apply a default case priority or a due date offset, those business rules are applied to any Client Service Case record created using the Quick Case dataform.

> If you are adding a case in **Complete** status, to see the case, you may need to edit your Cases dashboard or Client Service Cases widget filter settings to display Inactive cases if Inactive cases are hidden.

Related Topics:

- Configuring the Quick Case Feature

Mass Update Cases by Using the Cases Dashboard

You can mass update cases by using the **Cases** or **Cases-Old** dashboard.

To mass update cases:

1. In the modules bar, select **Cases** or select **Cases Module Old**.
   A list of Cases displays.
2. (Optional) Use the **Quick Search** and/or **More** search options to filter the items that display in the dashboard.

3. Locate the client service cases that are candidates for Mass Update, and click the **Select** option for each entry.
4. Click **Mass Update**.
   The **Case Mass Update** form displays.

5. Complete the **Case Mass Update** form:

Assigned To	Select a user to whom to assign the cases.
Status	Select a status for the cases.
Due Date	Select a due date for the cases.
Priority	Select a priority for the cases.

6. Click the **Save** button.

Case Status on the Cases-Old dashboard

The Status indicator on the Cases - Old dashboard (column 2 by default, as shown) automatically changes color based on the priority level.

Status example:

- **Black**: No priority is set.
- **Green**: Low priority.
- **Yellow**: Medium priority.
- **Orange**: High priority.
- **Red**: Critical priority.

■	null	Als Test Org (AlOrgDBA)			FW: TEST 8-3 #2		☐
■	null	Als Test Org (AlOrgDBA)			FW: TEST 8-3		☐
■	329401	Als Test Org (AlOrgDBA)		Implementation / Client Name...	Attachemt Test again...	In Progress	☐
■	329413	Als Test Org (AlOrgDBA)		Implementation / False Start	email test	Assigned	☐
■	329529	Yoyodyne Propulsion Systems		Client Relations / Client Review	Testing Email Integration	New	☐
■	329528	Yoyodyne Propulsion Systems		Client Relations / Client Review	testing email	New	☐

Reactivating cases

You can reactivate a case after it has been closed.

To reactivate a case:

1. In the modules bar, select **Cases** or select **Cases Module Old**.
   A list of Cases displays.
2. Click **More** to display the list of search filters.
   The Standard Filters dialog box opens.
3. Click **Archived** in the **Show** field and then click **Search**.
   The system displays the archived cases with italics and bold.
4. Locate the case to reactivate and edit the case:
   - Locate the entry and click (**Jump**).
   - Or
   - Select a row and click the **Edit** button

   The Client Service Case form opens.
5. Click **Reactivate** in the **Action Center** under **Workflow**.
   The system reactivates the case.

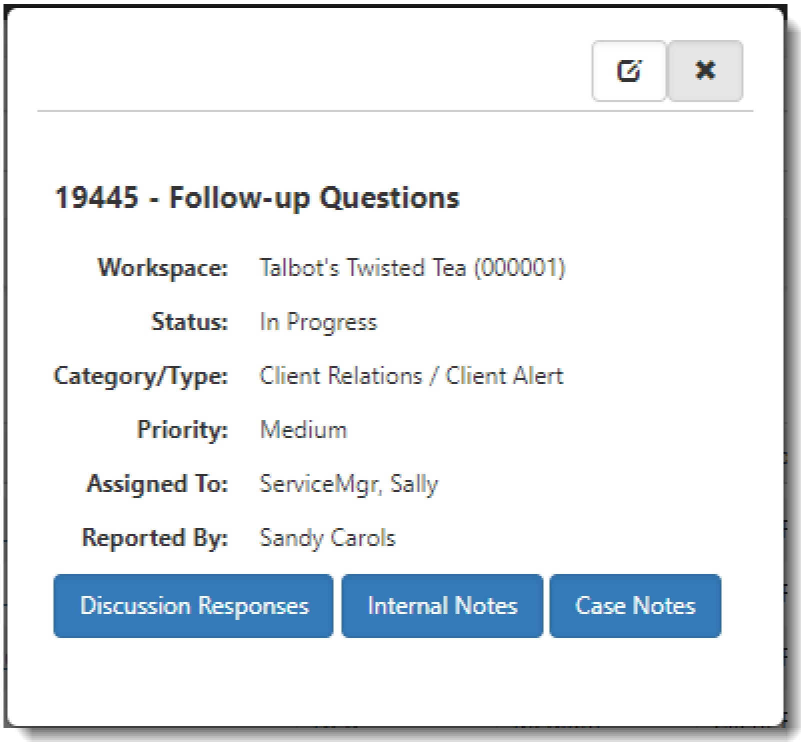
Cases Dashboard Quick View Summary

You can view case summary details on the Cases (Cases 2.0) dashboard without opening the case record. The summary details display in a popup window.

To view a case summary:

1. In the modules bar, select Cases.
   A list of Cases displays.
2. (Optional) Use the **Quick Search** and/or **More** search options to filter the items that display in the dashboard.

3. In the **Subject** column, click the subject link of the case for which you want to view summary details.
   The Quick View Summary popup window displays.



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4. Complete the following actions as necessary:
   - Click (**Open**) in the heading of the summary window to open the related case record.
   - Click **Discussion Responses** to view the most recent discussion thread.
   - Click **Internal Notes** or **Case Notes** to view notes from the case record.
   - **Discussion Responses**, **Internal Notes**, and **Case Notes** buttons only display if a user has appropriate security rights and discussion information and notes are entered on the case.
5. When finished viewing case summary details, click **x** to close the window.

Reassigning cases

If you have taken a case about as far as you can and you need someone else to work it, simply change the assignment to that person. Changing case assignment means that you are passing the responsibility of the case to the person to whom you are assigning it. Following the rules of case communications, you should provide a brief overview of what you have done so far and also provide an explanation of why they are being assigned the case and what you expect the person to do.

To reassign a case:

1. From an open case, in the **Case Assignment** fieldset, click **Assigned To**.
   A list of users displays.
2. Select a user.
3. On **Internal Notes**, click ✚.
   The field opens, ready for you to type.
4. Provide notes for the newly assigned user and click ✚ again.
5. Click **Apply**.

When you reassign a case, it no longer appears in your default search under the Case Search dashboard because the default search is filtered for you.

To remove the filter:

1. From the **Cases** search list, click **Assigned To**.
   This action removes the Assigned To filter. You can now see that the case is still in the system.
2. To reset the filter, click **Reset**.
   The Assigned To filter is restored.

You can remove the filter default to see the case. Cases assigned to you automatically show up under your default search.

Adding subscribers

You can add Subscribers to any case, which automatically notifies the selected people through email and the notification system within ClientSpace. Use notifications judiciously. Notifications can quickly go from keeping people who need to know in the loop to unnecessarily spamming people unrelated to a client issue.

To add subscribers:

1. From an open Case, in the **Action Center**, expand **Subscribers**.
2. Click **Select Subscribers**.
   The Select Users dashboard opens.
3. Select a subscriber by selecting the **Select** check box. Alternatively, on the targeted row, click (Jump). You can select multiple users.
4. Click **Ok**.

When you save the record, the user is automatically emailed.

To subscribe Client Team members to a case:

- See Subscribing client team members to cases.

Adding case discussions

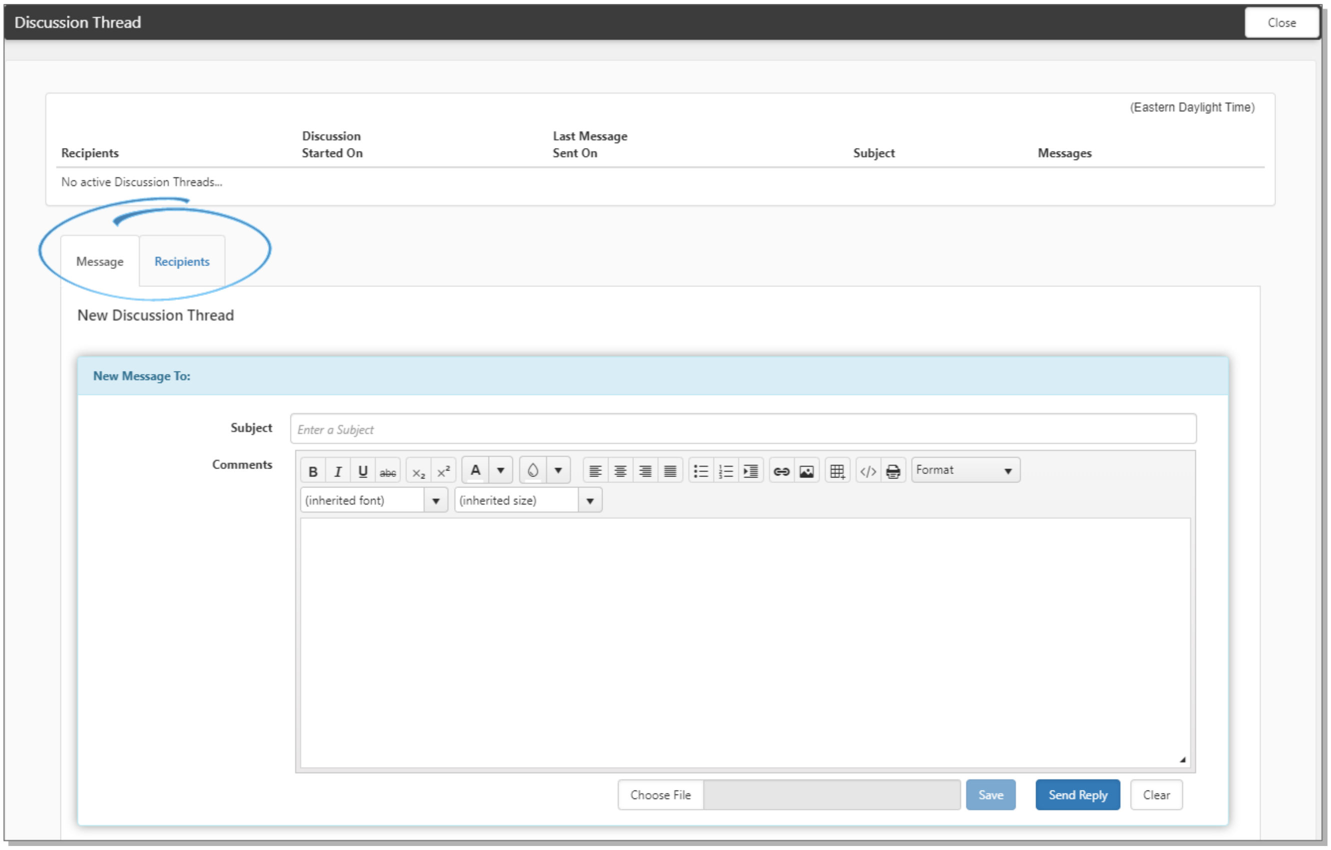
Case discussions allow you to communicate effectively with your clients in a conversational manner, directly from the case that they log. When you use case discussions, you can keep much of the communication outside of the case but still connected should you need to reference the discussions. The immediacy of case discussions allows you to submit your information to the client in email format, which is easier for them to receive and makes it more conversational.

Note: If you move a client service case with a Discussion Thread from one workspace to another workspace, the system moves the existing discussion messages, related attachments, and any open threads and recipients to the new workspace. See Moving cases.

To create a case discussion:

1. Open a client service case.
   The Client Service case form opens.
2. Select a **Client Contact**.
   This action automatically fills the Reported By and Email Address fields. A best practice is always to select a client contact when possible.
3. In the **Action Center**, expand **Links** < **More**, and click **Discuss** or **Case Discussions**.
   The Discussion Thread form opens. Notice at the top is where a running history of your

conversation with the client is displayed. The discussion has two tabs: **Message** and **Recipients**.



To compose the message:

1. From the **Message** tab, enter a **Subject**.
2. In **Comments**, enter your message.
   The comments field supports advanced formatting options, including font selection, size and color, as well as additional formatting, such as bold, italics, bullet points, and so on.

To add an attachment:

1. To add an attachment to the discussion, click **Choose File**.
   The Open dialog box opens.
2. Locate the file and click **Open**.
3. To save the attachment, click **Save**.

The next step is to select the recipients.

To select the recipients:

1. Click the **Recipients** tab.
   This is where you select whom to include in the discussion thread. The Recipients tab has an area for **Available Recipients** and **Currently Selected Recipients**. You can choose from **Contacts**, **Employees**, **Users** (your co-workers), and **AdHoc Email**.
2. Complete one or more of the following to add recipients to the discussion thread:
   - Select the **Contacts** tab and select a recipient by clicking the check box for one or more contacts.

     Note: You can use Search Contacts to filter the list of contacts that display.

   - Select the **Employees** tab and select a recipient by clicking the check box for one or more employees.

     Note: You can use Search Employees to filter the list of employees that display.

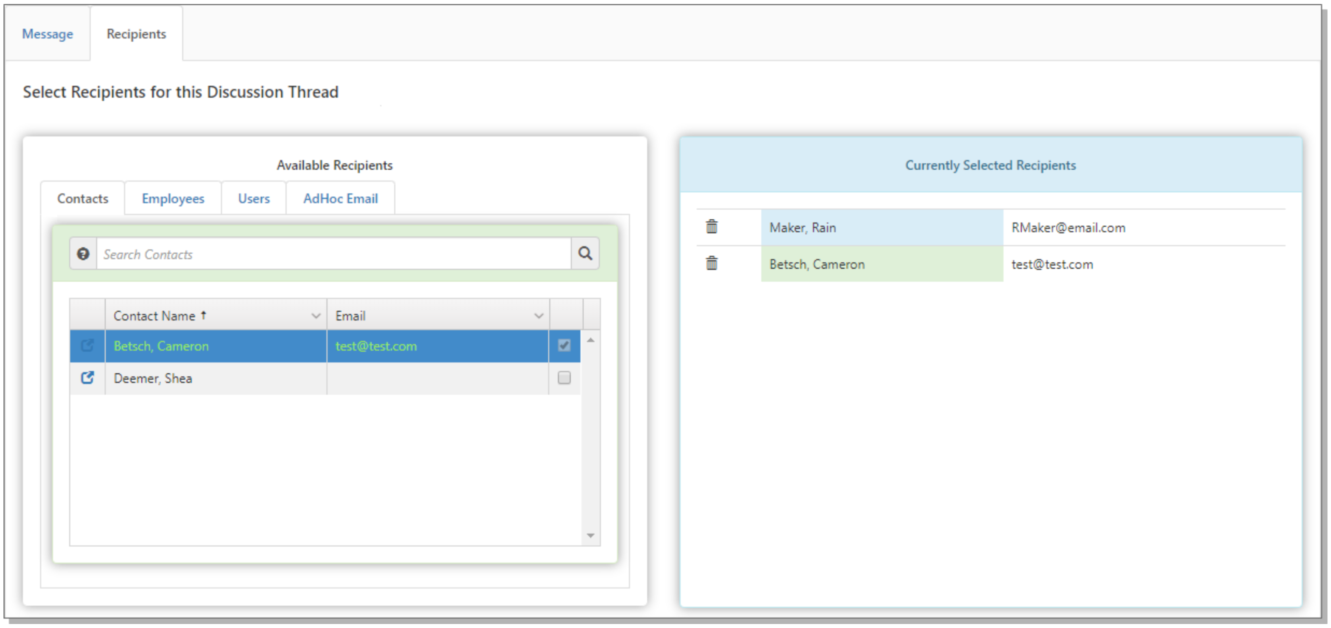
   - Select the **Users** tab and select a recipient by clicking the check box for one or more users.

     Note: You can use Search Users to filter the list of users that display.

   - Select the **AdHoc Email** tab and complete the following:
     - Enter a valid email address in the **Email Address** field
     - (optional) Enter a name in the **Last Name** field
     - (optional) Enter a name in the **First Name** field
     - Click the **Add** button

     Repeat as necessary for additional AdHoc Email addresses

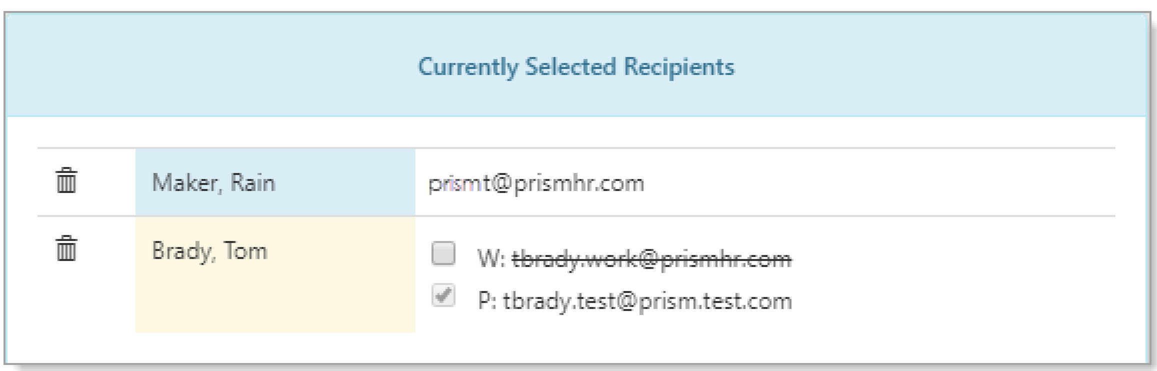
   As you select a recipient, the system lists the recipients in the adjacent panel, **Currently Selected Recipients**.



3. To remove recipients from the list, click (**Remove**).
   For Employees, you can also select their work or personal email account. By default, the system selects an employee's work email address.

To change the recipient's email (work to personal):

1. In the **Currently Selected Recipients** list, locate the employee and click (this action exposes the employee's email account list).
   The selected employee's work and personal email accounts display. The work email is selected by default.
2. To switch to the employee's personal email, select the personal email option.

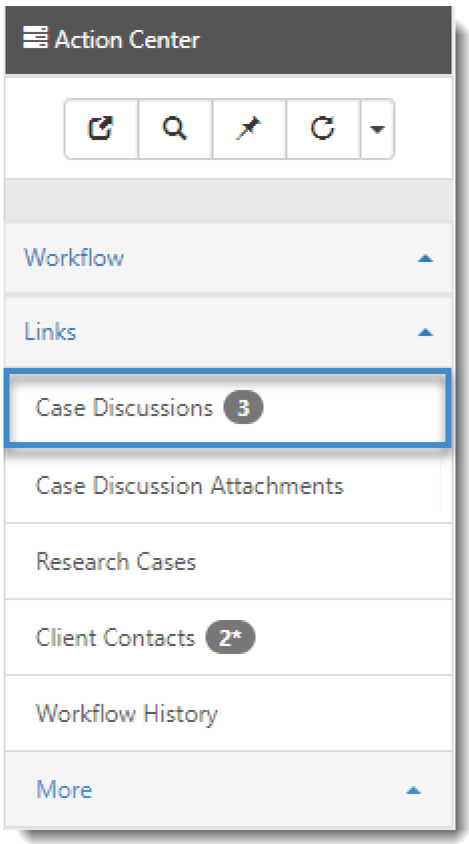


Now you are ready to send the message.

To send the message:

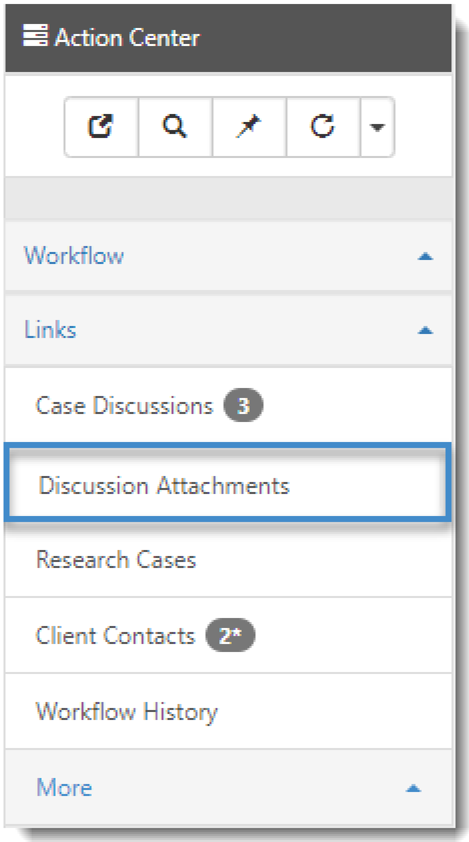
1. On the **Message** tab, review your comments, recipients, and any attached files.
2. Click **Send Reply**.

Discussion messages



As you add discussions to a case, in the Action Center, the Discussion counter increments, showing you how many discussions are attached to the case. Discussions have threads – there can be multiple messages within a thread, and multiple threads within a Discussion. The counter displays the total number of messages and an * for inactive messages should there be any.

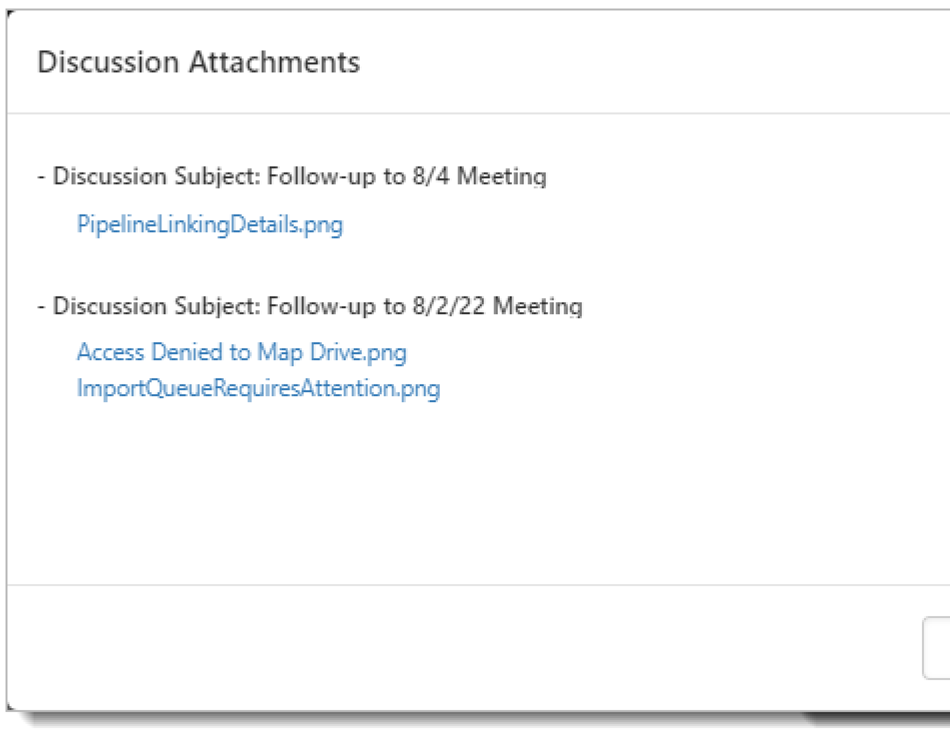
Discussion attachments



In the Action Center, click the **Discussion Attachments** link to view all attachments associated with all case discussions on the selected case.

As attachments are added to new discussions and replies, attachments for all discussions associated with the current case are organized in the Discussion Attachments window by Discussion Subject. Only discussions with attachments are listed.

Click an attachment name to download an attachment to the Downloads folder of your local computer.

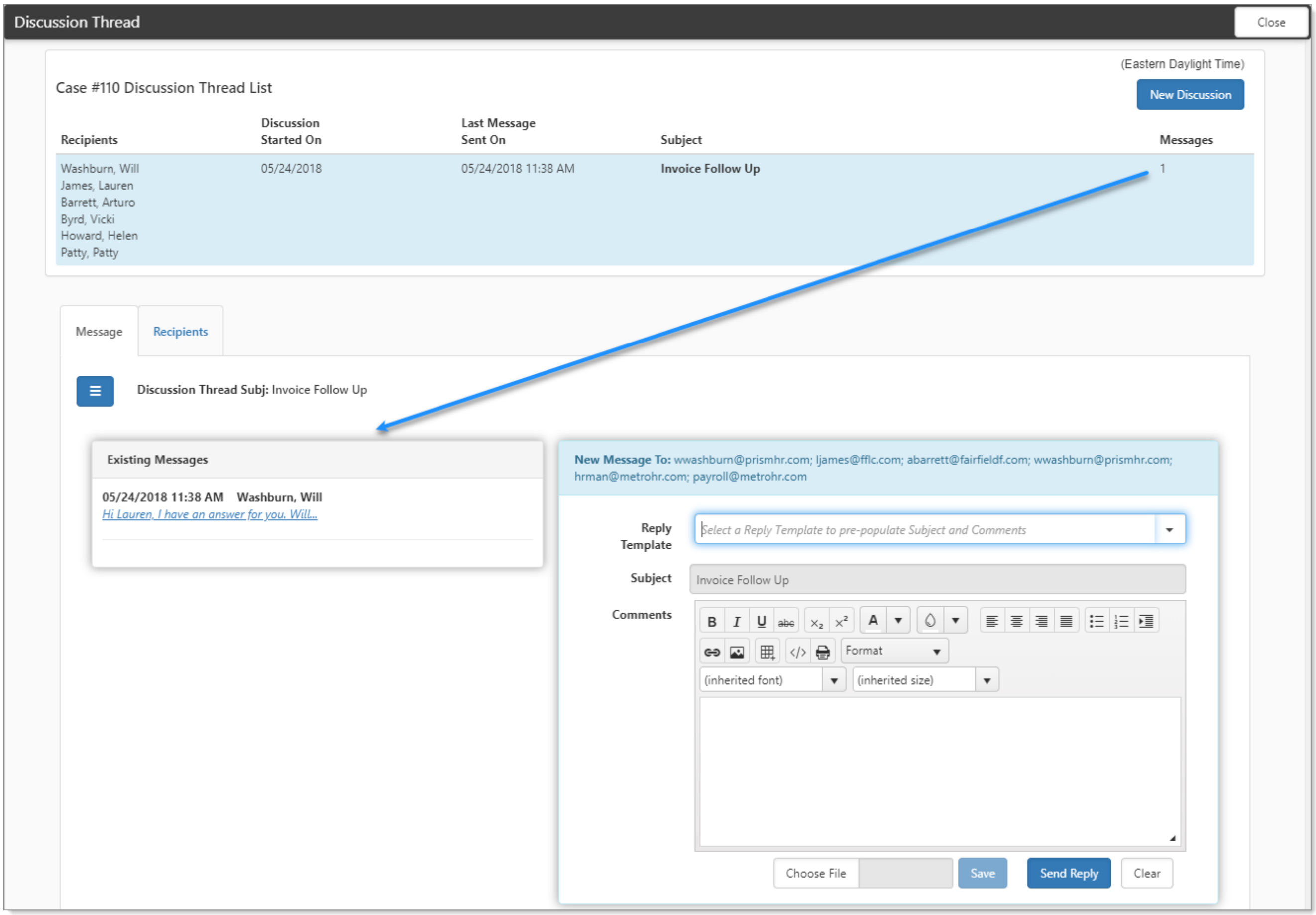


What happens next

- When you click **Send Reply** from the New Message To box, an email is sent to the recipients.
- When the recipients open their email, they see a link in the email message, **Send a Reply**. Clicking the link takes them to the discussion for the case, where the recipients can add comments and Send

Reply. See Replying to case discussions. Alternatively, if Email Integration is configured (consult your ClientSpace administrator), users can click the email **Reply** button.

- The original sender of the message also receives a response directly in the case discussion, which they can then review. At this point, the discussion thread starts to build, showing who has been notified, the subject of the discussion, and how many messages are currently attached.
- Additionally, you can create a new discussion for new subjects.



Note: The system uses the Send Email process to validate email addresses. If an email address is determined to be invalid, the invalid email address is stripped from the resulting email. The email message is then sent to any other email addresses that include valid formatting. The system logs an informational exception to indicate the email address was invalid.

Video

Watch the video Case Discussion Overview.

Replying to case discussions

When a Case Discussion message is sent, the message is delivered to the recipient's email mailbox, such as Outlook or Gmail. Users could have two options for replying to case discussions: Send a Reply link or the Reply button.

> Using the Reply button requires additional configuration. Consult with your ClientSpace administrator.

Reply options

When replying to a case discussion, users can either:

- Click the **Send a Reply** link within the email message. This functionality is always available.
- Click the standard **Reply** button from the email mailbox. This functionality requires additional ClientSpace configuration by your ClientSpace administrator.

To reply using Send a Reply link:

1. From the open email, in the email message, click **Send a Reply**.
2. You are connected to ClientSpace and taken to the case discussion thread.

To reply using the email mailbox Reply button:

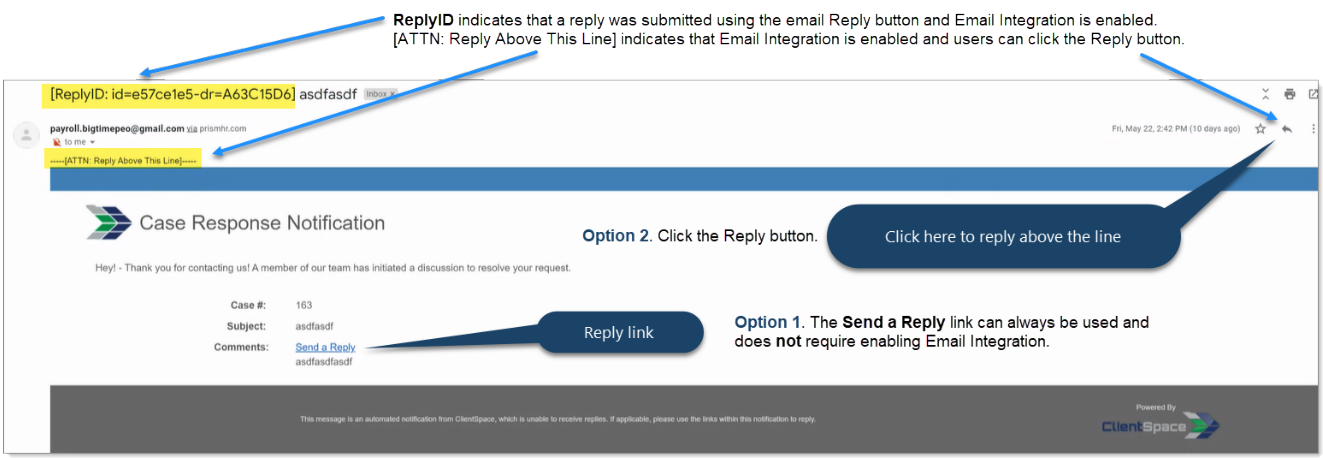
1. From the open email, click the mailbox **Reply** button.
2. A reply area opens to type your response and send the email as you would normally do for any email. The reply is captured in the case discussion thread within ClientSpace. This functionality requires additional ClientSpace configuration.

Replying directly from the email mailbox with Reply

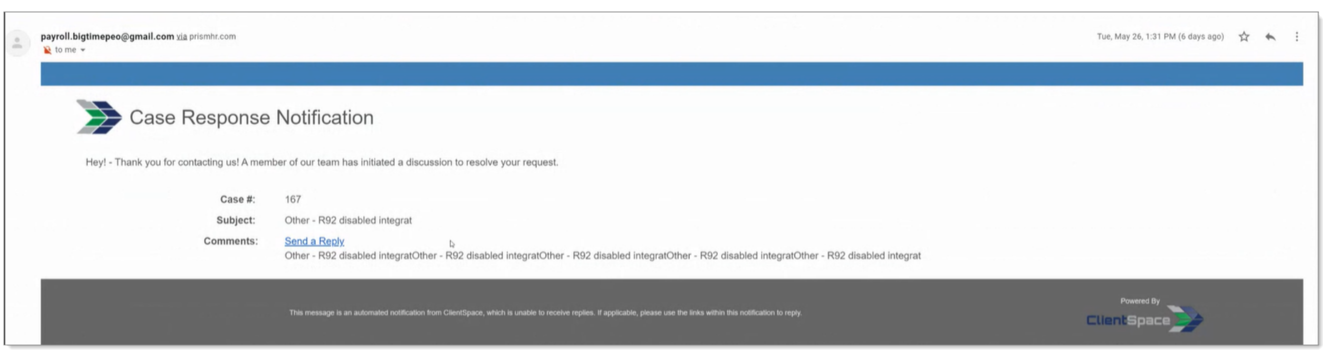
To use the **Reply** button from your mailbox, ClientSpace requires additional configuration using an Email Integration that is explicitly tied to email templates CSCDISC and CSCDISCNEW. See the topic *Configuring Case Discussion Replies Above This Line* in the *Setup & Administration Guide*.

How will you know that you can do this?

- When you see a ReplyID along with ATTN: Reply Above This Line (as in the following image), this indicates that Email Integration **is** enabled. You **can** use the Reply button to reply to the case discussion, and your message will be added to the case discussion thread.

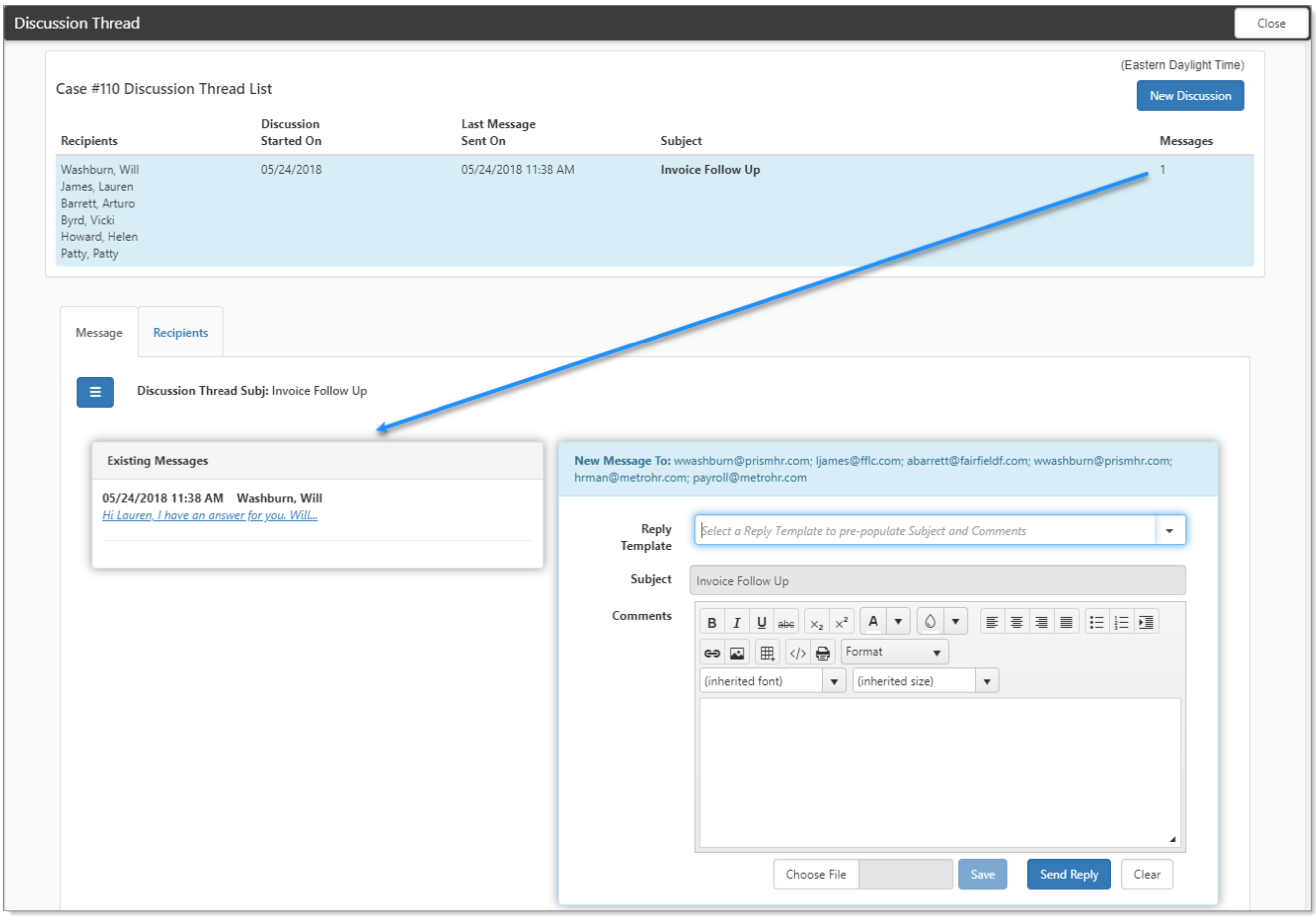


- When you do **not** see a ReplyID and the text ATTN: Reply Above This Line (as in the following image), this means that Email Integration has **not** been configured. If you click the Reply button, type a reply, and send, your case discussion reply will **not** be integrated into the case discussion thread.

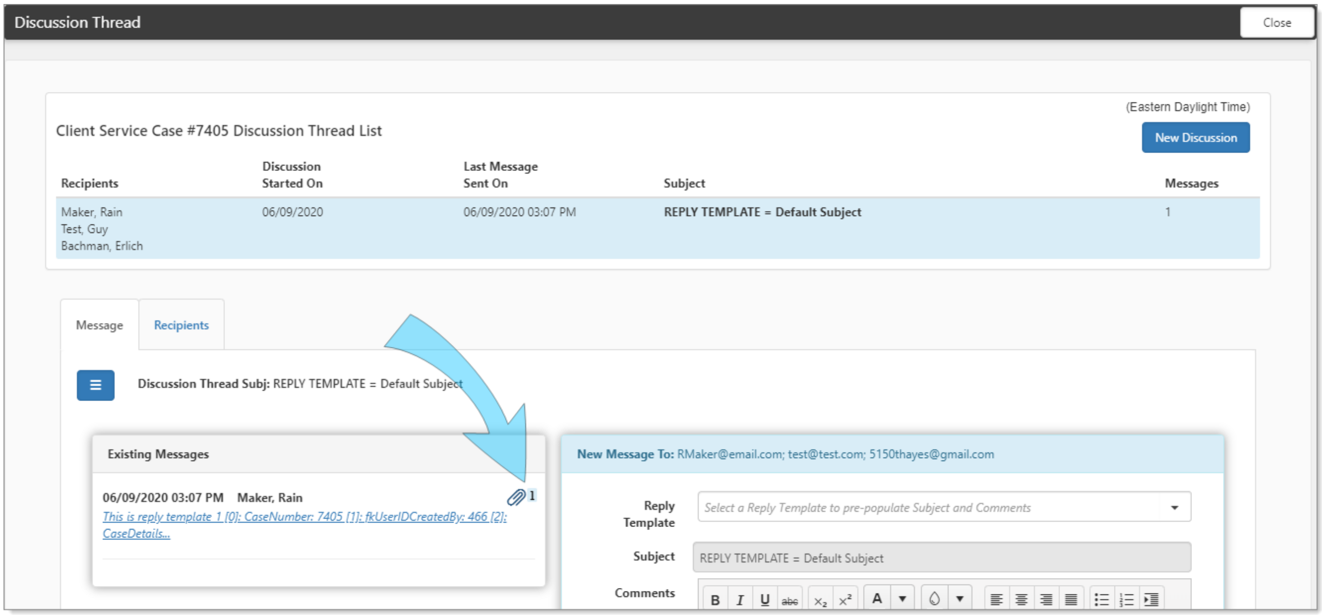


Case Discussion thread

When you click **Send a Reply** or the **Reply** button (requires additional configuration), you are automatically connected to ClientSpace and taken to the case discussion thread. From the Discussion Thread page, you can see the thread list and also view existing messages. From here, you can reply to the message by selecting a reply template (if applicable), typing in any customized notes, and selecting your recipients. A Reply Template list is available if any are configured for your organization. Templates provide standardized Subject and Message content for specific scenarios, such as payroll responses. Your ClientSpace administrator configures email templates.



For replies with file attachments, a counter indicates if attachments are present.



Reactivate a Closed Case When Replying to Discussion Thread

ClientSpace uses the Reactivate Case business rule on the Discussion Message dataform, which runs on the Discussions Pipeline. If a case is Closed and a discussion thread exists on the case, the system will reactivate the case when the system receives a reply on the discussion thread. See Reactivate Case business rule.

Moving cases

You can reassign cases in one workspace to another workspace through the Workflow links.

To move a case:

1. From an open Case, in the **Action Center**, under **Workflow**, expand **More**. Additional Workflow links are displayed.
2. Click **Move Case**.
   The Move Case dialog opens.
3. In **Workspace**, select a new workspace. You can type a partial name and the list jumps to the matching names.
4. Click **Ok**.

Note: If you move a client service case with a Discussion Thread from one workspace to another workspace, the system moves the existing discussion messages, open thread, and recipients to the new workspace.

Closing cases

When you are finished working a case, provide a resolution to describe what was done to resolve the issue. Adding detailed resolutions allows you to search through old cases to determine how you have solved a problem.

To close a case:

1. From an open case, in **Resolution**, add a detailed resolution.
2. In the **Action Center**, under **Workflow**, click **Complete**.

This action marks the case as completed and archives the case. Archiving the case makes all the fields read-only and clears the Active option. This action also removes the case from the Cases list. By default, only active cases are displayed in the Cases list. However, the case is still in the system. You can find it by searching for **All** or only **Archived** cases.

Adding Case Types

You can add case types with default values so that when your users add cases, you can set default values for some fields. You must be a Global Admin and be assigned a role with Edit rights to the Client Service Case Type (**gen_AdminCaseTypes**) form to add client service case types.

To add client service case types:

1. Go to **Admin Workspace**.
   There is more than one way to access the Admin Workspace:
   - From the modules bar, click **Workspaces**.
     The Workspace Search dashboard opens.
   - Type "Admin" in the search box to filter the list of workspaces and locate Admin Workspace.

   OR
   - On the modules bar, on the right side, click **<username>** > **Modules**.
     The Modules Search dashboard opens. The Admin Workspace is listed at the top of the dashboard.
2. Search for *Client Service Case Type* or select **Client Service** > **Client Service Case Type**.
   The Client Service Case Type dashboard opens.
3. Click **Add**.

The Client Service Case Type Add form opens.

4. Complete the form as required.

Fieldset	Field	Description
Case Type Details	Title	Enter a title for the Case Type.
	Category	Select a category for the Case Type.
	Secure	When the Case Type is secured, the system generates a CaseType_#TypeName# security entity that can then be used to provide secure case type access to users other than those directly associated with the Case Type. (The **Assigned To** user as well as Users in the **Notification** role, **Escalation Level 1** or **Escalation Level 2** roles always have rights to the case regardless if it is a secure case type.) Refer to Case security for additional details.
	Generates Distress Call	Configured Client Service Case Types that have the **Generates Distress Call** option selected automatically creates a Client Rescue record and relates it to the case. The Owner of the Client Rescue record is determined by the user who is defined in the **Distress Call Owner** role. This role should only contain one user.
	Default Subject	The **Default Subject** field can be used to set the Subject line for the Case Type in question on create. After this field is filled, the subject line no longer defaults. This is by design. We want to preserve any additional information that may have been added.
	Default Issue	The **Default Issue** field can be used to set the Issue field for the Case Type in question on create. After this field is filled, the Issue field no longer defaults. This is by design as

Fieldset	Field	Description
		we want to preserve any additional information that may have been added.
	Case Type notes	Enter notes about the case type.
	Disable Notifications	Select the **Disable Notifications** option to disable notifications to users or roles associated with the case type.
	Due Date Offset	The **Due Date** on the case is can automatically set using the **Due Date Offset** days you enter here. For instance, if you want the **Due Date** on the case to be automatically set as 5 days from the date the case was created or updated, enter 5 here. ClientSpace business logic applies the **Due Date Offset** based on Case Type and sets the date automatically on **Save** if the **Due Date** field on the case record is currently empty. If the **Due Date** has been set manually, it will not be overwritten.
	Due Date Offset Method	Select Calendar Days to calculate the **Due Date Offset** using calendar days. This method includes non-business days and company holidays in the **Due Date Offset** calculation. Select Business Days to calculate the **Due Date Offset** using business days. This method excludes non-business days and company holidays from the Due **Date Offset** calculation.

Fieldset	Field	Description
		Note: Business days are as configured in your ClientSpace install settings and company holidays are configured in your Company Holiday table (**System Admin** > **Company Holiday**). If you require help with these settings, please log a case with your Professional Services representative.
	Require Employee	When **Require Employee** is checked, the **Employee** field on Client Service Case: Add window and the Quick Case window are is required for data entry. The **Employee** field label also displays in red indicating that it is a required field.
	Label Override	Contents of this field will be displayed instead of the Case Type Title when this case type is exposed in PrismHR . If blank the Employee Portal will display the Title of this case type.
Case Type Billing	Billable?	TBD
	Avg. Hours To Complete	TBD
	Cost Rate	TBD
Default Assignment	Default Assignment, Assigned To User, Assigned To Field, Backup Assignment, and Backup Assigned To	**Note:** The fields in the Default Assignment fieldset change depending on the selection in the **Default Assignment** field. When you assign a case, you can specify the **Default Assignment** as Creator, Single User, or Client Role. ◦ **Creator**: Defaults the **Assigned To** user on the case to the person that creates the case.

<table>
<tr><th>Fieldset</th><th>Field</th><th>Description</th></tr>
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Single User: Defaults to the user selected in the Assigned To User field.

The Assigned To User field displays as a required field once Single User is selected.
Selecting Single User also causes the required field, Backup Assignment, to display. You can select an assignment type of Single User or Client Role.
Once the Backup Assignment is set, the Backup Assigned To field displays. It is also a required field. This is where you select the backup user or role based on the backup assignment type selected.

Client Role: Defaults to the user determined by the Client Team role selected in the Assigned To Field.

The Assigned To Field displays as a required field once Client Role is selected.
Selecting Client Role also causes the required field, Backup Assignment, to display.) You can select an assignment type of Single User or Client Role.
Once the Backup

</td></tr>
</table>

Fieldset	Field	Description
		Assignment is set, the **Backup Assigned To** field displays. It is also a required field. This is where you select the backup user or role based on the backup assignment type selected. **Backup Assignment** ensures that if the selected Single User or Client Role is not valid (i.e., is blank, Inactive, or Expired), the case type defaults to a meaningful value using the following validation order: ◦ **Validation Step 1:** If the **Default Assignment** on the Case Type Assignment record is Single User and that user is valid, the **Assigned To** user on the case displays the default assigned single user. ◦ **Validation Step 2:** If the **Default Assignment** on the Case Type Assignment is Single User and that user becomes invalid, the **Assigned To** user on the case displays the user or role from **Backup Assigned To** field. ◦ **Validation Step 3:** If the **Backup Assigned To** field user or role is invalid, the **Assigned To** user on the case displays the Manager of the responsible department from the Case Type category metadata associated with the case type. For example, if the **Category** field on the Case Type record for 401K is "Benefits", the system will check the Department

Fieldset	Field	Description
		Admin/Department Details record for "Benefits" and display the name shown in the **Manager** field as the **Assigned To** user on the case. ◦ **Validation Step 4:** If no valid default assignments can be found, the **Assigned To** field will be left blank, and the following error message displays when you click **Apply** or **Save** on the case: "There is no Assigned To selected and the associated case type does not have a default user selected. Please either set a default user on the case type or select an Assigned To user. "
Roles	Notification Role	Select the user role that should receive case type notifications on this Case Type.
	Assigned To Field	If a role is selected, when the Case Type is changed on a Client Service Case record, the list of users available in the **Assigned To** field will be updated to only the users in the configured role.
	Escalation Level 1 Role	This role will be used in the Level 1 escalation of this Case Type.
	Escalation Level 2 Role	This role will be used in the Level 2 escalation of this Case Type.
Case Type Exposure Setup	Case Type Visible to External Users	Exposes the case type to the user for the purpose of Case creation. If this option is not selected, external users do not have this case type as an option when creating a case.
	Allow External Access to This Case Type	Allows External users that are involved in the Case (CreatedBy, AssignedTo, or Owner) access to see and open the Case from the

Fieldset	Field	Description
		External Case Dashboard. External Case Creators always have access to view the cases they create, if the Case Type remains one which is exposed to external users.
	Expose Case Type in PrismHR	Previously, when this checkbox was checked, it allowed a case type to be selected in the PrismHR Employee portal widget. If checked you could also change the displayed case type title using the Label Override field. Now, this field has been replaced by the **Expose to Portal** field. It no longer determines if a case is used in the PrismHR Employee Portal as of Release 143. The field will be removed from the Client Service Case Type form in a future release.
	Expose Case Type to Quick Case	Check this box to allow this case type to be selected from the **Type** field of the Quick Case window. (The **Quick Case** feature is accessible from the Cases dashboard and is used for quickly adding a case using minimal required fields.)
	Case Type Position Tags	**Case Type Position Tags** allow you to choose which case types are visible to portal users by their PrismHR User Type. Both the Manager and Employee tags are set by default. To display a Case Type to only one group, remove one of the default tags from the **Case Type Position Tags** field as applicable on each Case Type record.

Fieldset	Field	Description
	Expose to Portal	The **Expose to Portal** field allows you to identify which case types can be selected in the HCM and/or Prism portals. Select HCM to make the **Case Type** available for selection in the HCM portal only. Select Prism to make the **Case Type** available for selection in Prism portal only. Or, select both HCM and Prism to make the **Case Type** available for selection in both the HCM and Prism portals

5. Click **Save**.

Case security

Case types can be secured on the case type form **Admin Workspace** > **Case Types**.

- The **Assigned To** user as well as Users in the **Notification** role, **Escalation Level 1** or **Escalation Level 2** roles always have rights to the case regardless if it is a secure case type.
- If the Secure option is cleared on the Case Type, then any Internal User with access to cases has access to that Case Type. If it is selected, only those users and Global Admins have access to that Case Type.
- When the Case Type is secured, the system generates a CaseType_#TypeName# security entity that can then be used to provide secure case type access to users other than those directly associated with the case type (see above). So, if the Case Type of Client Payrolls was secured, the system would generate a CaseType_ClientPayrolls entity that could then be added to a role to provide secure access to cases of that type.
- Secured Case Types implement Row (or record) Level Security, meaning that when the case is generated, security roles are generated for the user roles mentioned previously, for that individual case using the role values on the case type at the time.
- Making a Case Type secured, or changing the roles associated with that security **will only affect newly created cases going forward from the time of the change**. Likewise, removing case type security does not remove security on the previously created cases of that type.
- Global Admins can click the padlock icon in the header of an individual Case to remove record level security for individual cases.
- Users that have the client service case entity with a level of access of **Admin** will be able to access secured cases with row level security via notifications or BI reports. They will not be able to see

these cases in the Case module by default and will only be able to link to them from the methods mentioned before.

Subscribing to case type subscriptions

Some case types are more time sensitive than others. One way to keep up with particular case types is through subscriptions. You can subscribe to an individual case by adding yourself to the notification list on the case itself. However. the most efficient way receive notifications on cases of a particular type is through the **Case Type Subscriptions** module.

ClientSpace provides the ability to select Case Type subscriptions (within security limits), which means you can subscribe to a given case type and if you have security appropriate to see the case type, you are notified when cases of this type are created.

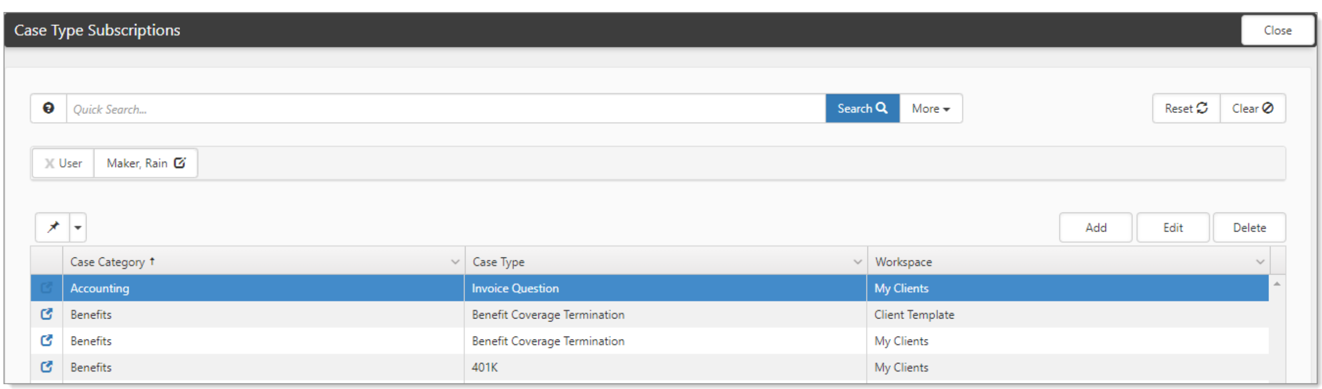
This topic describes Case Type Subscriptions and how to manage them through the Case Type Subscriptions module. The Case Type Subscriptions module allows you to subscribe to specific case types either by:

- Individual **workspace** (filtered by the workspaces to which the selected user has access),
- Or by selecting **My Clients**, which subscribes the user to the selected case type for any workspace where they are a member of the **Client Team** role in workspace security settings.

The Case Type Subscription module displays a list of subscriptions for the current user. From this module you can add, edit, or delete case type subscriptions so that you can easily customize the case notifications you receive.

To subscribe to a case:

1. On the modules bar, select **Case Type Subscriptions**.
   The Case Type Subscriptions dashboard opens.



2. Click **Add**.
   The Subscription Selection form opens.
3. For **User**, select a user.

The selected user who is to receive notifications for cases of this type. Administrator users can either subscribe themselves or add subscriptions for other users by selecting a different user in the list. User selection is limited to Global Admin users.

4. For **Workspace**, select the workspace from which you would like to receive these case type notifications.
   - To subscribe to the selected case type for any workspace where you are on the **Client Team** dataform in the workspace, choose **My Clients**.
   - Global admin uses can either subscribe themselves in the same way or add subscriptions for other users by selecting a different user.
5. For **Category**, select a category for the case.
6. For **Type**, select a Type for which you would like to receive the notifications. This list is filtered by the selected Category.

Note: Case Type Subscription follows the ClientSpace security model. A user is not allowed to subscribe to or receive notifications for any case type to which they do not have access.

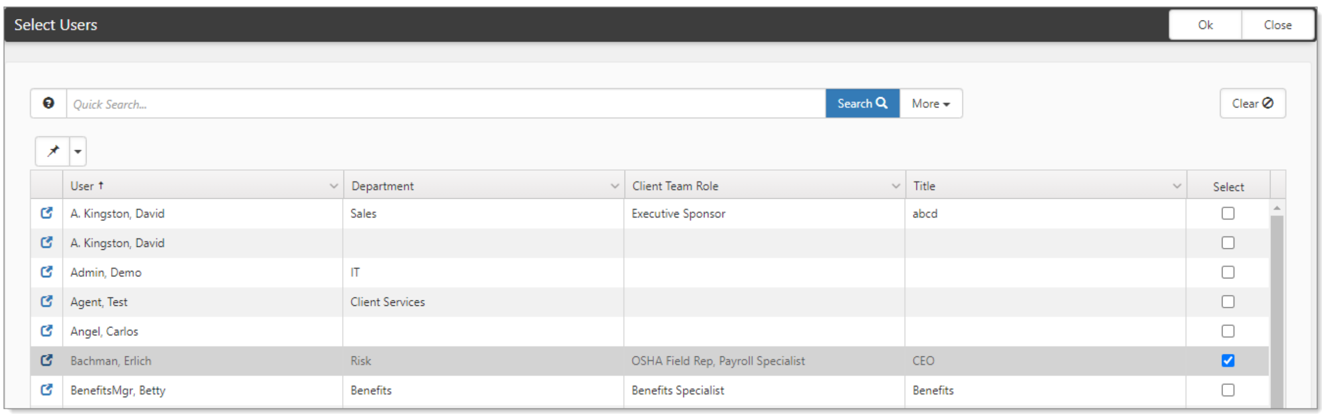
Subscribing client team members to cases

While viewing a case, you can easily add client team members as subscribers to the case. From the list of workspace users, you can use Quick Search and More search to find users quickly and save your search. You can verify the client team from within any workspace. Additionally, when you add a user to a team role, it automatically makes them available for selection as a subscriber.

To add client team members as subscribers:

1. Open a Client Service Case.
2. In the **Action Center**, expand **Subscribers** and click **Select Subscribers**.
   The Select Users list displays. The list comprises client team members and workspace users. Note the Client Team Role column.
3. From here, you can use **Quick Search**:
   - Full Name (starts with)
   - First Name (starts with)
   - Last Name (starts with)
   - Client Team Role (starts with)
   - Email address (%)

4. Use **More** search to search by:
   - Department
   - Client Team Role
   - Client Team Member (enable the option)
5. From the Users list, highlight the row, and in the **Select** column, select the check box. Alternatively, click (Open). The user is selected. You can select multiple users.
6. Click **Ok**.
   You are returned to the Client Service Case. The selected user is now listed as a Subscriber. For users with multiple roles, the roles are comma-separated, as in the following example.

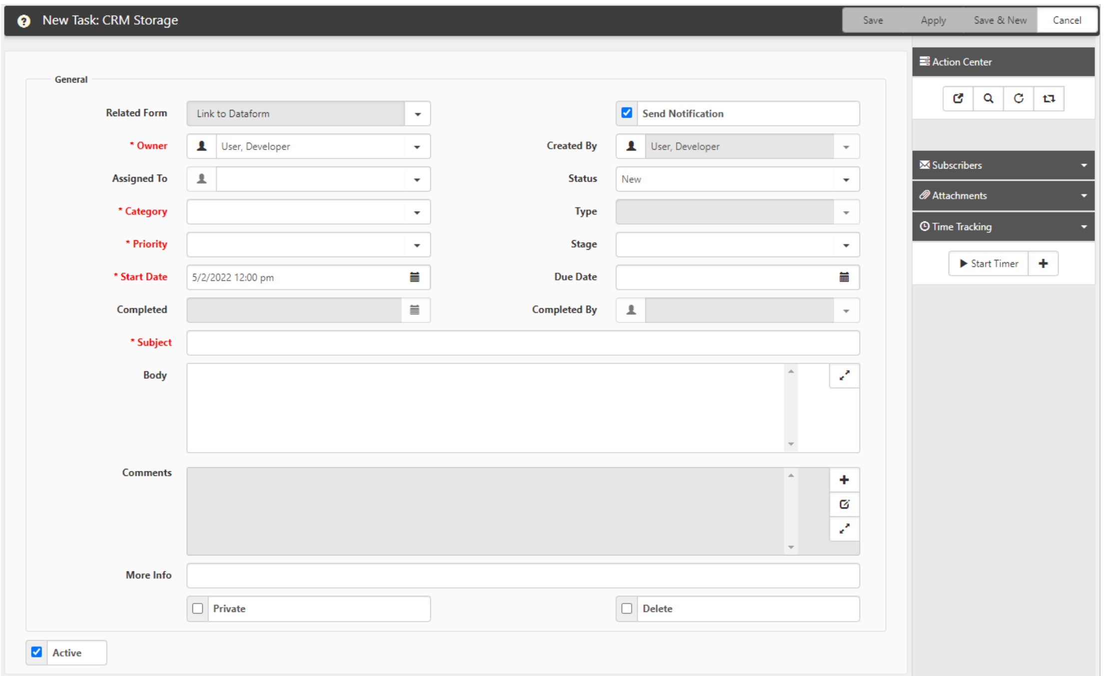


7. Click **Save**.

> When users are deleted, they are no longer subscribers to the case. If a Client Team Role changes, the case displays the old user as a subscriber. For example, if the Benefits Specialist role changes from Sally Jones to Will Baker. Sally will continue to show as a subscriber because you add the user as a subscriber and not the role.

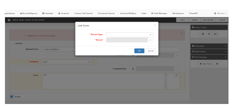
Adding tasks

Tasks are work items of limited scope, sort of like a checklist of To-Do items. Tasks help you track individual required work items before you can complete the next step. Additionally, after you add a task, you need to monitor the progress to ensure the task completes on schedule.



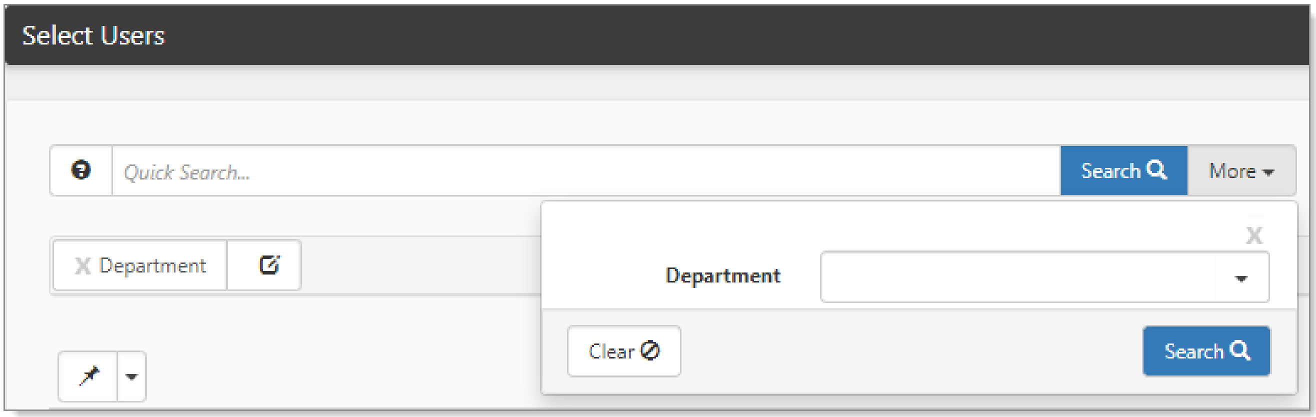
To add a task:

1. Open an **Organization**.
   The Organization Detail form opens.
2. In the **Action Center**, expand **Tasks**.
3. Click **Add Task**.
   The New Task form opens.
4. Complete the form.

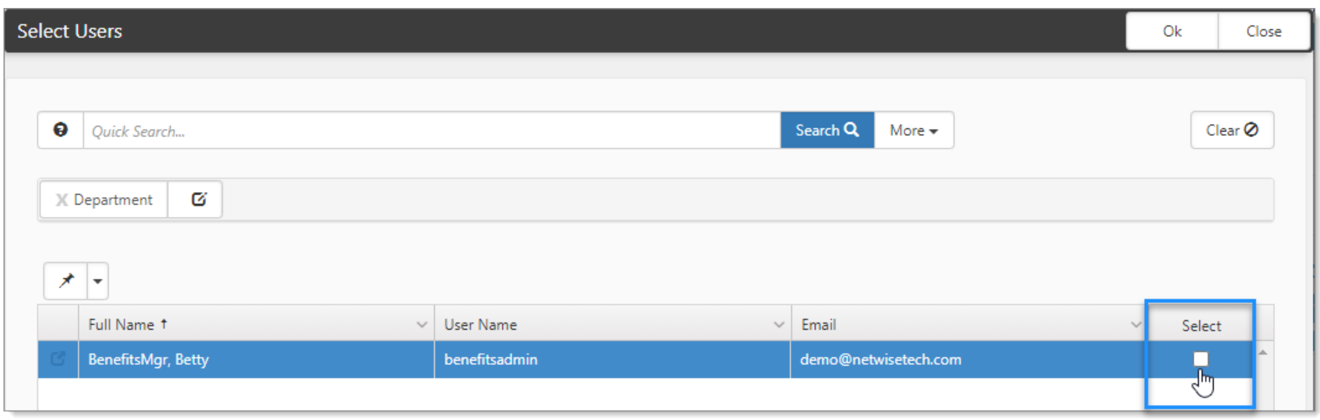
Related Form	If not adding directly from a dataform, the default is Link to Dataform. Used to attach the task to a dataform if required by your current security role assignment. If you click **Save** or **Apply** without selecting a dataform and receive a "Related From cannot be empty" error, you are required to click in the **Related Form** field and select the **Record Type** and **Record** (i.e., related form) from the Link Form window before you can proceed with saving the task. 
Send Notification	When a change occurs, notifications are sent to the Owner, Assigned To, and users in the Subscribers list. Default is to send notifications. To update without notifications, clear this field. Then, the system automatically resets this field after a save completes.
Owner	Required. Defaults to the person who created the task.
Created By	Auto-filled with the user who created the task.

Assigned To	Person that is responsible for completing the task.
Status	Default is New. Select a status: New, In Progress, Complete, Deferred, On Hold, Other.
Category	Required. Select a category: Implementation, Accounting, Benefits, HR, Onboarding, Other, Payroll, Rick, Sales, Underwriting.
Type	When Category is selected, Type becomes available. Select a type: Owner, Influencer, AIG Eligible.
Priority	Required. Select a priority: Critical, High, Medium, Low.
Start Date	Required. Defaults to the current date and time. Use the date picker to select a different date. To change the time, type over time.
Due Date	Use the date picker to select the due date. To change the time, type over time.
Completed	Completed is auto-filled when the Status changes to Complete.
Completed By	Completed By is auto-filled.
Subject	Required. Provide a meaningful subject.
Body	Provide adequate detail for the Assigned To user to be able to complete the task.
Comments	• To add comments, click ✚. • When done, click ✚ again.
More Info	You can provide additional notes about the task in this field.
Private	Marks the task as private and is only visible to the Assigned To and Owner users.
Delete	Select this option to mark the task for deletion by a scheduled process.
Active	Default is enabled – the task is Active.

5. To add subscribers to this task, in the **Action Center**, expand **Subscribers** and click **Select Users**. The Select Users dashboard opens. From here you can select users from the list, search using Quick Search or More search.



6. To search for users by Department, click **More**, select a Department, and then click **Search**.
   The filtered list is displayed.
7. Highlight a user, enable the **Select** option, and click **Ok**.



   The user is added as a subscriber to the task and will receive notifications.

8. To add attachments to this task, in the **Action Center**, expand **Attachments**. See Attachments.
9. Click **Save**.
   The new task is now visible in the Tasks mini-panel of the Action Center for the Organization.

Adding tasks to cases

Tasks can be automatically added to a case through a workflow and manually added from the Action Center. For example, an employee termination workflow might comprise multiple tasks to complete the work: terminate employee benefits, close the employee out of the payroll system, schedule an exit interview, and so on. These tasks can be automated through a workflow. You can also add a task to a case manually through the Action Center.

To add a task to a case:

1. From an open case, in the **Action Center**, expand **Tasks**.
2. Click **Add Task**.
   The New Task form opens.
3. Complete the form. Required fields are marked in red.

Send Notification	When a change occurs to the task, notifications are sent to the Owner, Assigned To, and users in the Notifications list. Default is to send notifications. To make an update with no notifications, clear this field. The system automatically resets this field after a save is complete.
Owner	Required. Select the user who will own this task. Defaults to the user who creates the task.
Created By	Defaults to the user who creates the task.
Assigned To	Select the user who must complete the task – the user who will actually perform the work.
Status	Defaults to New.
Category	Required. Select the category that fits the task.
Type	When Category is selected, Type becomes available. Select a type: Owner, Influencer, AIG Eligible.
Priority	Required. Select a priority for this task: Critical, High, Medium, Low. This helps the Assigned To person understand the urgency.
Start Date	Required. Start date defaults to the current date and time.
Due Date	Select a Due Date if applicable.
Completed	Completed is auto-filled when the Status changes to Complete.
Completed By	Completed By is auto-filled.
Subject	Required. Provide a meaningful subject for the Assigned To person.
Body	Provide detailed information for the Assigned To person.
Comments	Add helpful comments as the task is updated.

More Info	You can provide additional notes about task in this field.
Private	Marks the task as private and only visible to the Assigned To and Owner users.
Delete	Select this check box to mark the task for deletion by a scheduled process.
Active	Tasks are active by default. When you clear this check box, the task becomes read only and is removed from any of the task management lists. You can search for inactive tasks.

4. Click **Save**.

What happens next

When you save the form, the Assigned To person is automatically notified of the newly assigned task. Additionally, the Owner is notified when there are changes to the task status. Anytime a save occurs, a notification is issued. For example, if the Owner adds a comment, both the Owner and the Assigned To person are notified.

The case owner can also add users. For example, let's say we want to keep the payroll person informed about a terminated employee. We can do this through Notifications.

To add notified users:

1. From on open task, in the **Action Center**, expand **Notifications**.
2. Click **Select Users**.
   The Select Users dashboard opens.
3. Scroll through the list of users or use Search to locate the user.
4. When you locate the user, select the **Select** option and click **Ok**. Alternatively, you can double-click the user.
   You are returned to the New Task form with the newly selected user listed under Notifications. Additionally, Notifications now shows a badge counter or an updated counter.

Reassigning tasks

Just like cases, tasks can be reassigned. So if we need to reassign this task from Bill Mitty to Priscilla Ayroll, and ask her to do something, we can change the Assigned To person on the task.

To reassign tasks:

1. From an open task, in **Assigned To**, select a user.

2. In **Comments**, add a comment to let the newly assigned user understand what they need to do to complete the task.
3. Click ✚.
   The Comments box opens, ready for you to type.
4. When you are done, click ✚ again.
   The Comment is added.
5. Click **Apply**.
   The task is now assigned to the new user.

Comments are date and time stamped to provide a running audit of what happened during a task.

Completing tasks

Use the Workflow links in the Action Center when you are ready to mark a task complete. Before you complete a task, you may want to add a comment.

To mark a task complete:

1. From an open task, to add a comment before you complete the task, click ✚.
2. Enter your comments about completing the task.
3. Click ✚ again.
   The comment is added.
4. In the **Action Center**, under **Workflow**, click **Complete Task**.

The form closes and you are returned to the Organization form. In the Action Center, the number of active tasks counter is updated, showing 1 less active task. The badge counter now has an asterisk beside the count, indicating that there are archived tasks (including the task you just completed).

Chapter 18

Creating Activities, Cases, Tasks, and Claim Notes from Outlook

Did you know that you can create activities, cases, tasks, and worker's comp claim notes from your Outlook email? Additionally, you can attach an email message to an existing dataform or a task!

First, you must ensure that you have installed the email add-in for Outlook. The add-in is what connects your Outlook email with ClientSpace. To install the add-in, see the topic *Email add-in for Outlook* in *ClientSpace Setup & Administration*. After you have installed the email add-in, you are ready to create activities, cases, tasks, and claim notes. You want to target emails that are relevant and then post the emails to ClientSpace.

Overview of the process

The following list provides an overview of the process. Link to the various topics for specific procedures.

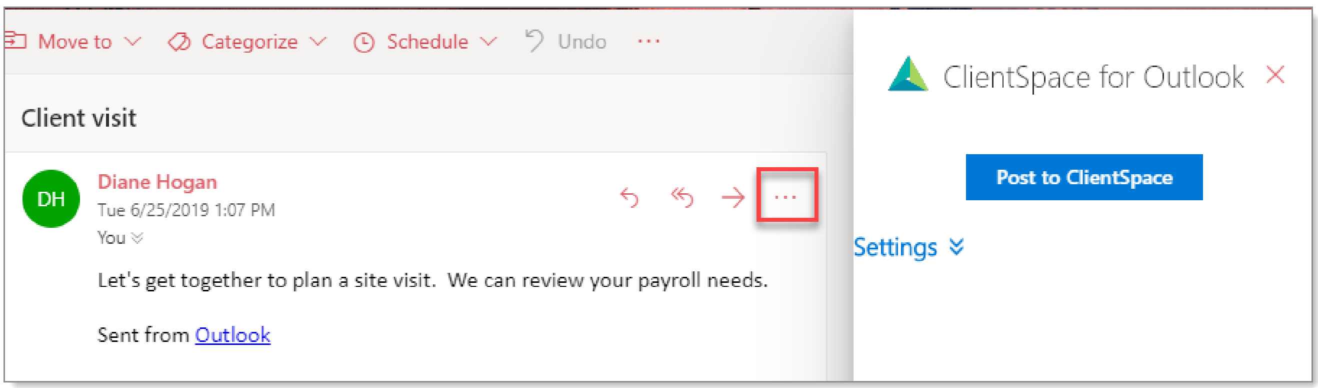
1. **Install the email add-in for Outlook**. See the topic *Email add-in for Outlook* in *ClientSpace Setup & Administration*.
2. **Post emails to ClientSpace**. See Posting emails to ClientSpace.
   - Attach To Record (See Attaching emails to Dataforms and Attaching emails to Tasks)
   - Create Activity (See Creating Activities from emails)
   - Create Case (See Creating Cases from emails)
   - Create Task (See Creating Tasks from emails)
   - Create Claim Note (See Creating Claim Notes from emails)

Posting emails to ClientSpace

ClientSpace provides the following default actions for posting emails: Create Activity, Create Case, Create Task, and Attach to Record. From Attach to Record, you can attach an email message to a dataform or task. You may have additional actions if your global admin has configured Outlook modules to create any workspace dataform, such as Create WC Claim.

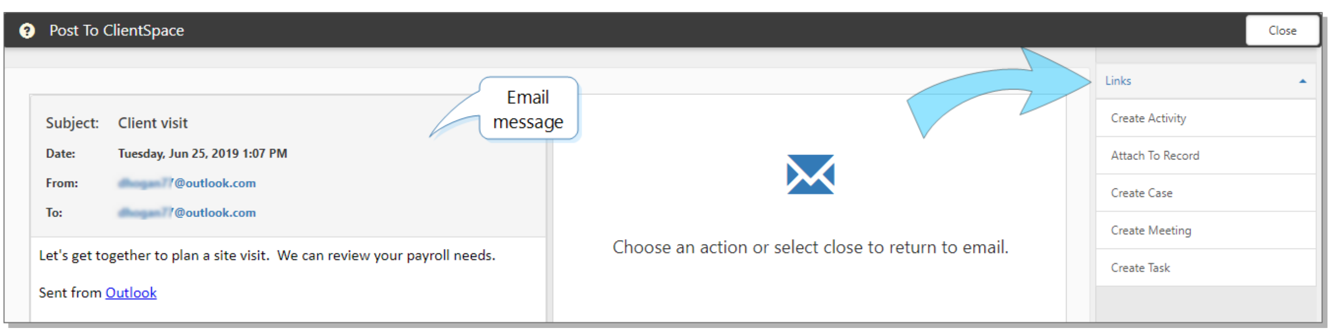
To post emails to ClientSpace:

1. Open Outlook.
2. Select and open an email.
3. From the open email, on the right, click **. . .** (**More actions**) and select **ClientSpace for Outlook**.
   The ClientSpace for Outlook pane opens on the right.



   Now you are ready to post the email message to ClientSpace.

4. Click **Post to ClientSpace**.
   This action logs you into ClientSpace and opens the Post to ClientSpace page. The available links are based on your organization's configuration. You see the email message and the Links menu.



5. Now you are ready to save the email message as:
   - Activity (Go to Creating Activities from emails)
   - Case (Go to Creating Cases from emails)
   - Task (Go toCreating Tasks from emails)

- Attach to a Dataform (Go to Attaching emails to Dataforms)
- Attach to a Task (Go to Attaching emails to Tasks)

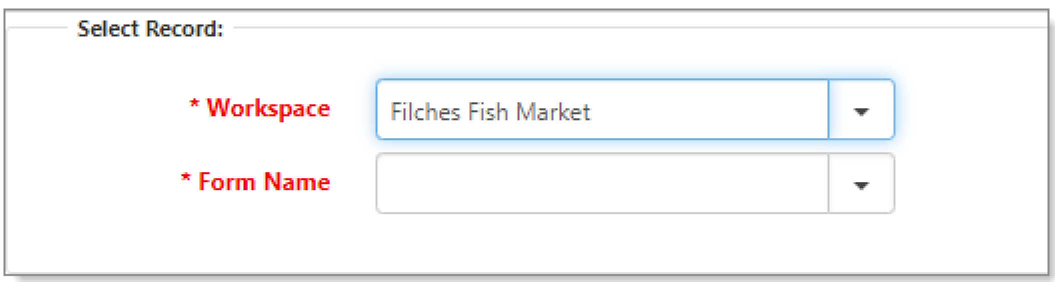
Attaching emails to Dataforms

With Attach To Record, you can attach emails to a dataform so that you do not have to create an Activity first, and then perform the additional step of attaching it to a record. When you select Attach To Record, the Select Record form opens in the right pane. You can select a dataform and then select a specific record.

Scenario: Suppose that you have an email about a worker's comp claim, and you want to attach the email to a specific record. The selected Workspace determines the available forms, and the form drives the available records. You want to select the form that pertains to a worker's comp claim and then select the record that is relevant to the employee in question.

To attach the message to a dataform:

1. From the **Post To ClientSpace** page, under **Links**, select **Attach To Record**.
   The Select Record form opens in the right pane.

2. For **Workspace**:
   - If the FROM address is the same as the ClientSpace email address, it is not used to determine the Workspace. Instead, the first TO address is used to determine the Workspace.
   - If the FROM address is DIFFERENT from the ClientSpace email address, the Workspace defaults to the Workspace of the email sender (the FROM address).
   - The email address is compared to all employee email addresses (both Personal and Work email) in the system and tries to match the email. If a match is found, the Workspace associated with that employee is used. If multiple instances of the employee email (Personal and Work) exist, the most recently changed instance is used. If the From email is not recognized, then you can select a Workspace of your choice.
3. In **Form Name**, select a dataform. When you select a dataform, the **Record** field becomes available. Form Name lists forms that are available to the selected Workspace.

4. In **Record**, select a record. To see a more extensive list, click **Record Search**. The search list is loaded for the selected Workspace. You cannot change or remove the selected Workspace.
5. To select a record from the **Search** list, highlight the row and click **Ok**.
   You are returned to the Post To ClientSpace page with the Select Record form auto-filled (right pane).
6. Click **Attach To Record**.
   In the right pane, the message "Email attached successfully!" appears.
7. From here you can click **Open Record** to view the record with the newly attached email.
   The form that you selected in Form Name opens.
8. From the open form, in the **Action Center**, expand **Activities** to see the newly attached email.
9. When ready, click **Cancel**.
   You are returned to the Post to ClientSpace page.
10. When ready, click **Close**.

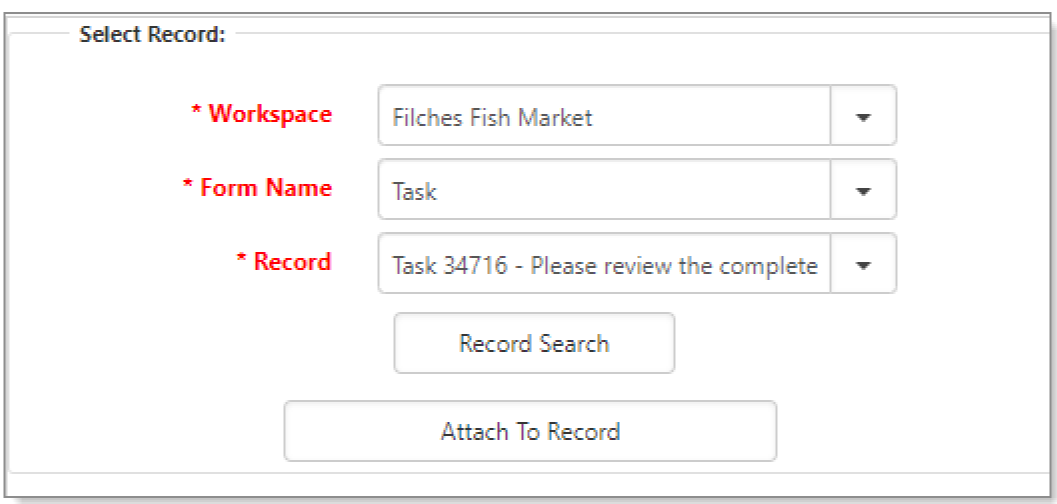
Attaching emails to Tasks

With Attach To Record, you can attach emails to a task in a prospect or client workspace. Attaching emails to a task is beneficial to organizations that are task-centric versus case-centric.

Scenario: An underwriting user receives an email from the Workers Comp insurer regarding a current task they are working on. The user wants to attach the email to a task, to maintain an accurate history.

To attach the message to a dataform:

1. From the **Post To ClientSpace** page, under **Links**, select **Attach To Record**.
   The Select Record form opens in the right pane.



2. Complete the form:

Workspace	• If the FROM address is the same as the ClientSpace email address, it is not used to determine the Workspace. Instead, the first TO address is used to determine the Workspace. • If the FROM address is DIFFERENT from the ClientSpace email address, the Workspace defaults to the Workspace of the email sender (the FROM address). • The email address is compared to all employee email addresses (both Personal and Work email) in the system and tries to match the email. If a match is found, the Workspace associated with that employee is used. If multiple instances of the employee email (Personal and Work) exist, the most recently changed instance is used. If the From email is not recognized, then you can select a Workspace of your choice.
Form Name	Select **Task**. The Record field becomes available.
Record	Select a task. The list shows active tasks. • To view inactive tasks, type ~ to the beginning of the type ahead. • To see a more extensive list, click **Record Search**. The search list is loaded for the selected Workspace. You cannot change or remove the selected Workspace. • To select a record from the **Search** list, highlight the row and click **Ok**. You are returned to the Post to ClientSpace page with the Select Record form auto-filled.

3. Click **Attach To Record**.
   In the right pane, the message "Email attached successfully!" appears.

To view the task with the newly attached email:

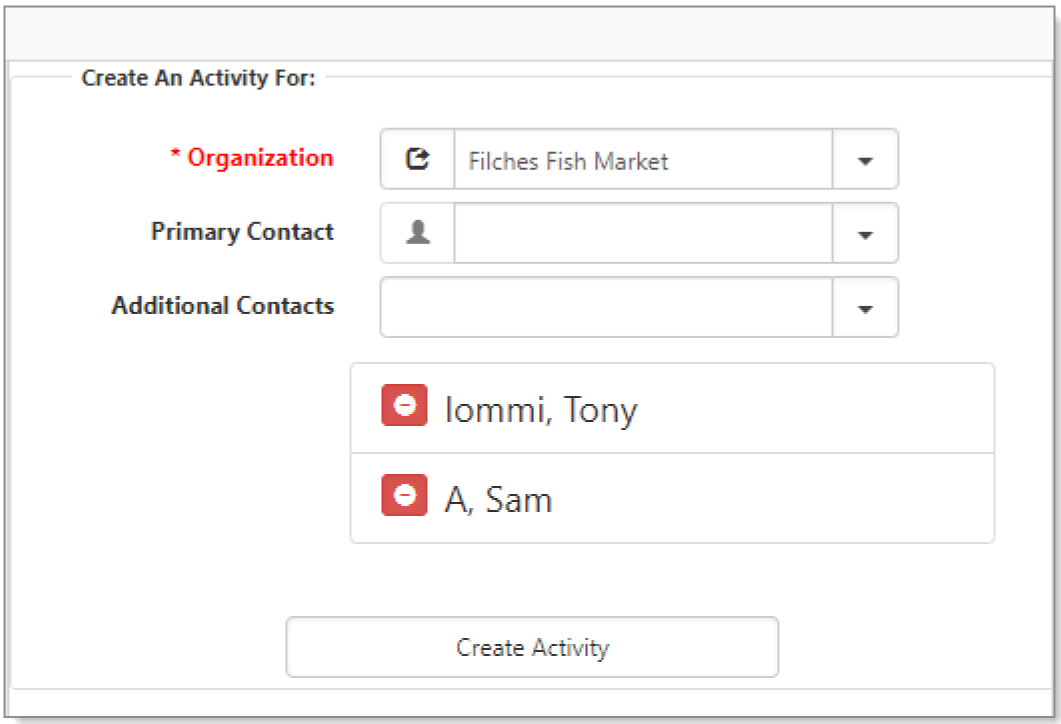
1. Click **Open Record**.
   The task that you selected in Form Name opens.
2. From the open form, in the **Action Center**, expand **Activities** to see the newly attached email.
3. When ready, click **Cancel**.
   You are returned to the Post to ClientSpace page.
4. When ready, click **Close**.

Creating Activities from emails

When you select **Create Activity**, *Create An Activity For* opens in the right pane. You can connect the Activity to an organization and contact. You can only select organizations that you have access to along with their related active contacts.

To create an activity:

1. From the **Post To ClientSpace** page, in **Links**, select **Create Activity**.
   The Create An Activity For form opens in the right pane with three fields: Organization, Primary Contact, and Additional Contacts.



2. Complete the fields:

Organization	**To select an organization, do one of the following:** 1. Use the default selection: ■ If the **From** address *matches* a contact in the system, the From address automatically sets to the contact's organization. ■ If the From address is the *same* as the ClientSpace email

	address, the first **To** address determines the organization. 2. If there is no organization, you can select one from the list. 3. To add an organization, select **Add new item**. The Organization Detail form opens. 4. When done, click **Save**. The new organization is now available in the Organization list.
Primary Contact	**To select Primary Contact, do one of the following:** 1. Use the default selection: ▪ If the **From** address of the email *matches* a contact in the system, Primary Contact automatically sets to the matching contact. ▪ If the From address is the *same* as the ClientSpace email address, the first **To** address determines the Primary Contact. 2. If there is no Primary Contact, you can select a contact from the list. 3. To add a contact, select **Add Contact**. The Add Contact form opens. 4. When done, click **Save**. The new contact is now available in the list of primary contacts and additional contacts.
Additional Contacts	**To add additional contacts:** 1. Select names from the list. You can add multiple contacts. 2. To add a contact, select **Add Contact**. The Add Contact form opens. 3. When done, click **Save**. The new contact is now available in the list of additional contacts and primary contact.

3. To remove users, click (**Remove**).
4. When ready, click **Create Activity**.
   In the right pane, the message "Activity created successfully!" appears.
5. From here, you can click **Open Activity** to view the record with the newly attached email.
   The Activity Details form opens, with text from the email message auto-filled.

To see the contacts you added:

1. In the **Action Center**, expand **Contacts**.
2. When ready, click **Cancel**.
   You are returned to the Post To ClientSpace page.
3. Click **Close**.

The Select Workspace form closes. The system uses the email sent date to populate the Date Sent of the email activity, so the user is not prompted on save when sending the email.

Creating Cases from emails

When you select Create Case, the Workspace Selector form opens so that you can connect the case to a Workspace. Cases created from an external mailbox show the Communication Method as Email Add In and is read-only.

To create a case:

1. From the **Post To ClientSpace** page, in **Links**, click **Create Case**.
   The Select Workspace form appears in the right pane.
2. For **Workspace**:
   - If the FROM address is the same as the ClientSpace email address, it is not used to determine the Workspace. Instead, the first TO address is used to determine the Workspace.
   - If the FROM address is DIFFERENT from the ClientSpace email address, the Workspace defaults to the Workspace of the email sender (the FROM address).
   - The email address is compared to all employee email addresses (both Personal and Work email) in the system and tries to match the email. If a match is found, the Workspace associated with that employee is used. If multiple instances of the employee email (Personal and Work) exist, the most recently changed instance is used. If the From email is not recognized, then you can select a Workspace of your choice.
3. Click **Create**.
   The Case Add form opens. Fields are populated based on your Create Case module configuration. From here, you can manage the case as usual.
4. Complete the form.
5. Click **Save**.
   You are returned to the Post To ClientSpace page. In the right pane, the message "Case #nnnn successfully created!" appears.
6. From here, you can click **Open Case** to view the newly added case.
7. On the Post To ClientSpace page, when ready, click **Close**.
   The Select Workspace form closes.

For more information about creating cases or tasks from Outlook, see Creating Activities, Cases, Tasks, and Claim Notes from Outlook.

Creating Tasks from emails

When you select Create Task, the Workspace Selector form opens so that you can connect the task to a Workspace.

To create a task:

1. From the **Post To ClientSpace** page, in **Links**, click **Create Task**.
   The Select Workspace form appears in the right pane.
2. For **Workspace**:
   - If the FROM address is the same as the ClientSpace email address, it is not used to determine the Workspace. Instead, the first TO address is used to determine the Workspace.
   - If the FROM address is DIFFERENT from the ClientSpace email address, the Workspace defaults to the Workspace of the email sender (the FROM address).
   - The email address is compared to all employee email addresses (both Personal and Work email) in the system and tries to match the email. If a match is found, the Workspace associated with that employee is used. If multiple instances of the employee email (Personal and Work) exist, the most recently changed instance is used. If the From email is not recognized, then you can select a Workspace of your choice.
3. Click **Create**.
   The New Task form opens. Fields are populated based on your Create Task module configuration.
4. Complete the form.
   Email fields that are available for configuration include Date Sent, Subject, Body, To (Recipient), and From (Sender).
5. Click **Save**.
   You are returned to the Post To ClientSpace page.
6. When ready, click **Close**.
   The Select Workspace form closes.

For more information about creating cases or tasks from Outlook, read Creating Activities, Cases, Tasks, and Claim Notes from Outlook.

Creating Claim Notes from emails

When you select Create Claim Notes, the Workspace Selector form opens so that you can connect the task to a Workspace.

To create a Claim Note:

1. From the **Post To ClientSpace** page, in **Links**, click **Create Claim Notes**.
   The Select Workspace form appears in the right pane.
2. For **Workspace**:
   - If the FROM address is the same as the ClientSpace email address, it is not used to determine the Workspace. Instead, the first TO address is used to determine the Workspace.
   - If the FROM address is DIFFERENT from the ClientSpace email address, the Workspace defaults to the Workspace of the email sender (the FROM address).
   - The email address is compared to all employee email addresses (both Personal and Work email) in the system and tries to match the email. If a match is found, the Workspace associated with that employee is used. If multiple instances of the employee email (Personal and Work) exist, the most recently changed instance is used. If the From email is not recognized, then you can select a Workspace of your choice.
3. Click **Create**.
   The Claim Notes form opens. Fields are populated based on your Create Claim Notes module configuration.
4. Complete the form.
   Fields available for configuration include **Note Category**, **Subject**, **Notes**, and **Comp Claim**.
5. Click **Save**.
   You are returned to the Post To ClientSpace page where a "Record #{N} Successfully Created!" message and **Open Record** button are displayed.

   Note: Optionally, click the **Open Record** button to review or edit the new claim note in the Claim Notes form.
6. When ready, click **Close** on the Post to ClientSpace page.
   The Select Workspace form closes.

For more information about creating cases or tasks from Outlook, read Creating Activities, Cases, Tasks, and Claim Notes from Outlook.

Chapter 19

Reporting with Business Intelligence

Business intelligence, or BI, is an umbrella term that refers to a variety of software applications used to analyze an organization's raw data. For ClientSpace, BI specifically refers to the embedded Izenda Business Intelligence module that allows you to create on-demand reports from your ClientSpace data using a simple interface.

Business Intelligence provides the following:

Dashboards	Dashboards are a dynamic and interactive tool for viewing critical information from multiple sources in a single view. Users can hover over a report to get details or drill down into it for greater insight. Users can create and customize their own BI dashboards, then use them to print, save, share and send reports. Security options let you decide who can view or make edits.
Data Source	Data Source is the table, view, or data source report that provides data for your Report. Data sources may be joined using Foreign Key relationships to aggregate data. In Business Intelligence, data sources are configured on the Data Sources tab.
Fields	Fields are the individual data points available from a data source in Business Intelligence. An example is tblOrganization, which is the datasource, and Name, Address1, and City, would be fields from that datasource.
Filters	In the Filters tab, the fields of the table/view chosen in the Data Sources tab can be filtered so that only pertinent entries appear in the table.
Exporting	You can save the report to your list of reports. Keep in mind that the lists of categories are global, so please do not add new unless it is a must. Please use the ones already there.
Scheduling	Using Izenda BI, you can schedule and email reports and dashboards to a recipients list. Care should be taken when scheduling reports or dashboards, because the schedule has no way of adhering to the #CurrentUser or

	#CurrentWorkspace options for filtering, so each recipient of the report receives all of the data contained within the report based on any static filters that are saved on the report.

Why the IZENDA reporting engine? Izenda is a rich, flexible reporting tool that provides self-service reports and dashboards delivered over a browser including:

- 100% browser-based AJAX Design Environment
- Rich reports and dynamic dashboards
- Great looking 3D charts, flexible grids, visual grouping
- Summaries, subtotals, calculations, formats
- Flexible and dynamic smart filters
- Interactive linking and drill-down
- Exports to all popular file formats
- Native speed execution

Business Intelligence enables your organization to access data and manage it in the ClientSpace system. For a ClientSpace user to access data from BI reports, the user must have a Reporting Profile. For details on configuring security for Reporting Profiles for Business Intelligence, see the topic *Configuring security in Business Intelligence reporting* in the *ClientSpace Setup & Administration Guide*.

User Guides

- For in-depth information on Izenda reporting, see the Izenda reports wiki.
- For a quickstart, review the guide Business Intelligence User Guide.

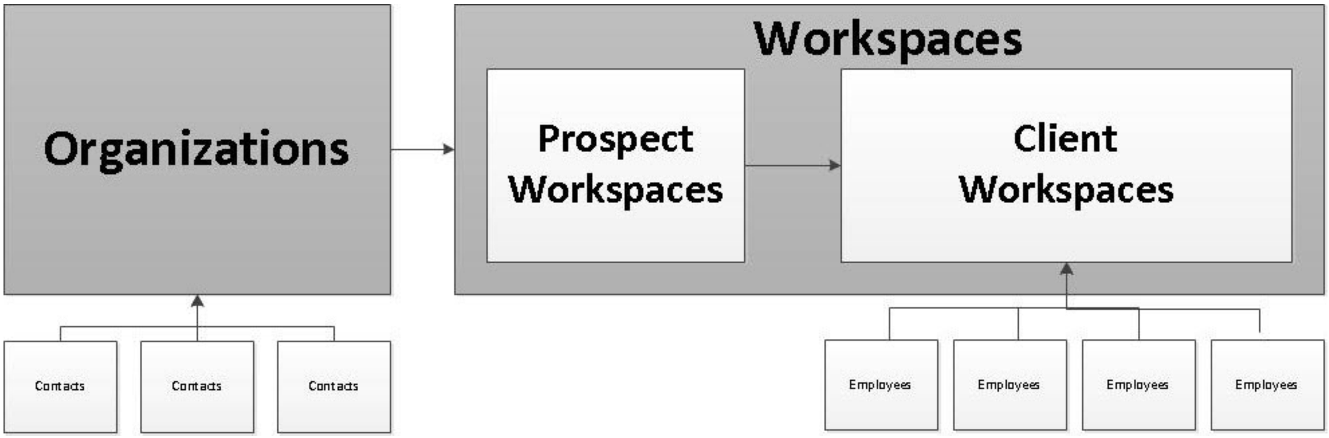
Learning how: Business Intelligence overview

This video provides an overview of the Business Intelligence reporting tool.

Watch the video Business Intelligence Overview.

Using the data

One of the most important parts of writing reports is to understand the data you’re building it with. Here is a high-level view of how the data is structured in client space:



What data can you see?

You will have access to a select number of custom views that have been developed for your use. To start out you'll have access to the ClientSpace data.

What is a view?

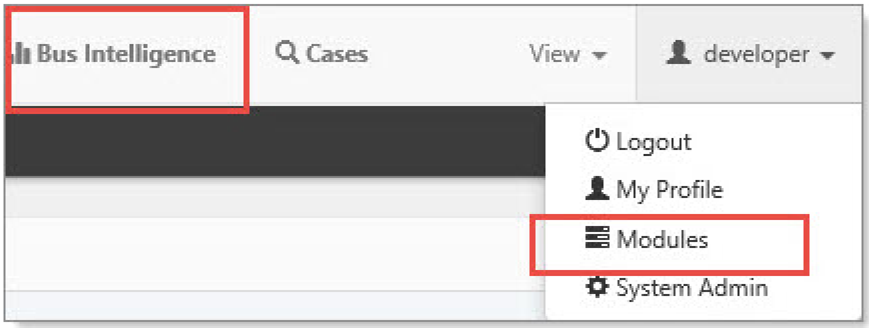
A view is a specific grouping of data from tables in the database. These views have data grouped together that is related to each other to relieve you of the need to understand the data table relationships. We have included a number of views as part of our CORE and PEO packages for reporting use.

Getting started

Let's get started by signing into ClientSpace. You may need to add the Bus Intelligence module to the top header bar.

To get started with Business Intelligence:

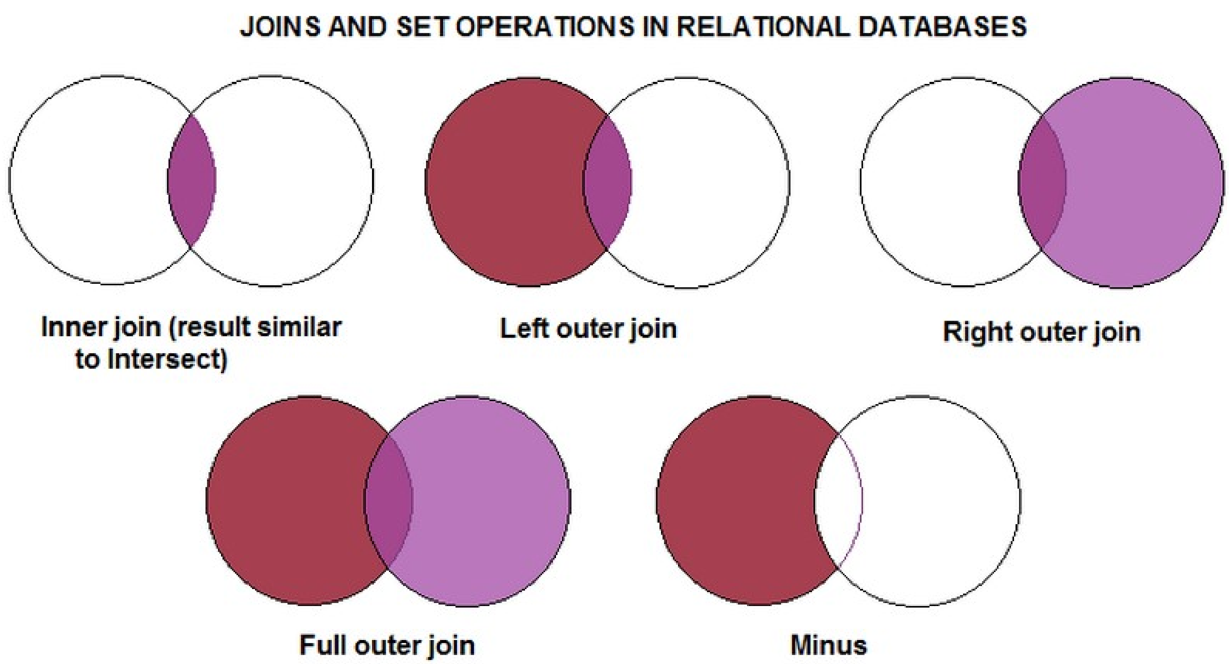
1. Sign into ClientSpace.
2. You can either add the Business Intelligence Reporting module to your header links or you can access it through the full list of modules.



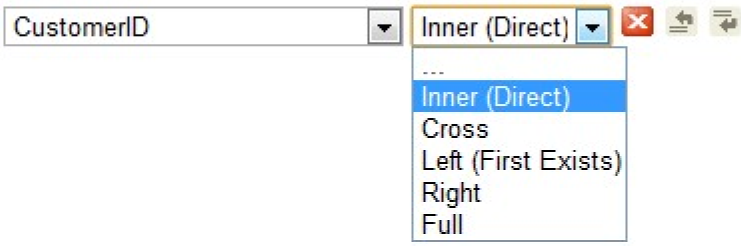
3. On the modules bar, click **Business Intelligence** to open the module.
   This action presents the list of reports to which you have access.
4. Select a report to run.
5. You can also Design a report or Add a report.

Building a new report

Before you begin - a word about JOINS: To connect the data in your ClientSpace installation for use in a report, the tables must be joined together. The following image describes common joins used in SQL server to connect tables.



For the purposes of BI reporting in ClientSpace, we will only deal with a few of these.



Inner (Direct) Join: Selects rows from two tables such that the value in one column of the first table also appears in a column of the second table. This is one of the most common joins used in reporting.

Cross Join: A cross join returns a result table where each row from the first table is combined with each row from the second table.

Left (First Exists) Join: The Left Outer Join known also as Left Join returns all rows from the left table in the Left Outer Join clause, no matter if the joined columns match. A field in a result row is null if the corresponding input table did not contain a matching row. This is the second most common join used - Inner and left joins make up most of the joins necessary to connect ClientSpace data.

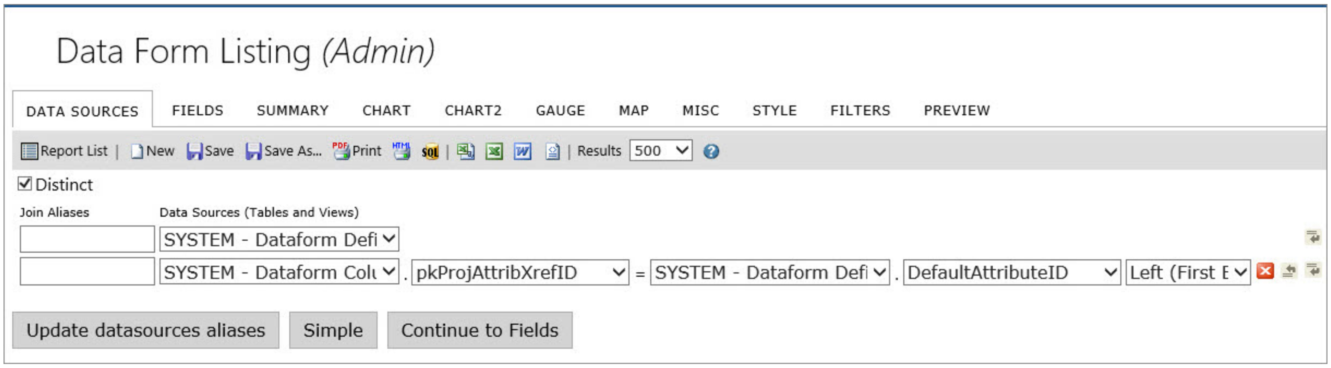
Right Join: The Right Outer Join known also as Right Join returns all rows from the right table in the Right Outer Join clause, no matter if the joined columns match. A field in a result row is null if the corresponding input table did not contain a matching row.

Full Join: The Full Outer Join known also as Full Join returns all rows from Both the Right Outer Join and Left Outer Join. A field in a result row is null if the corresponding input table did not contain a matching row.

Data Sources tab

Select your data source. This is the list of views that you'll have access to choose from. We have designed these views in a manner that you'll only need to select one at a time. NOTE: A view is a set of tables that have already been joined.

The Data Sources tab shows which tables and views are already stored in the database. Also provides a choice of which table to view or which tables you would like to join. To join two tables and/or views, they must have fields with identical entries.

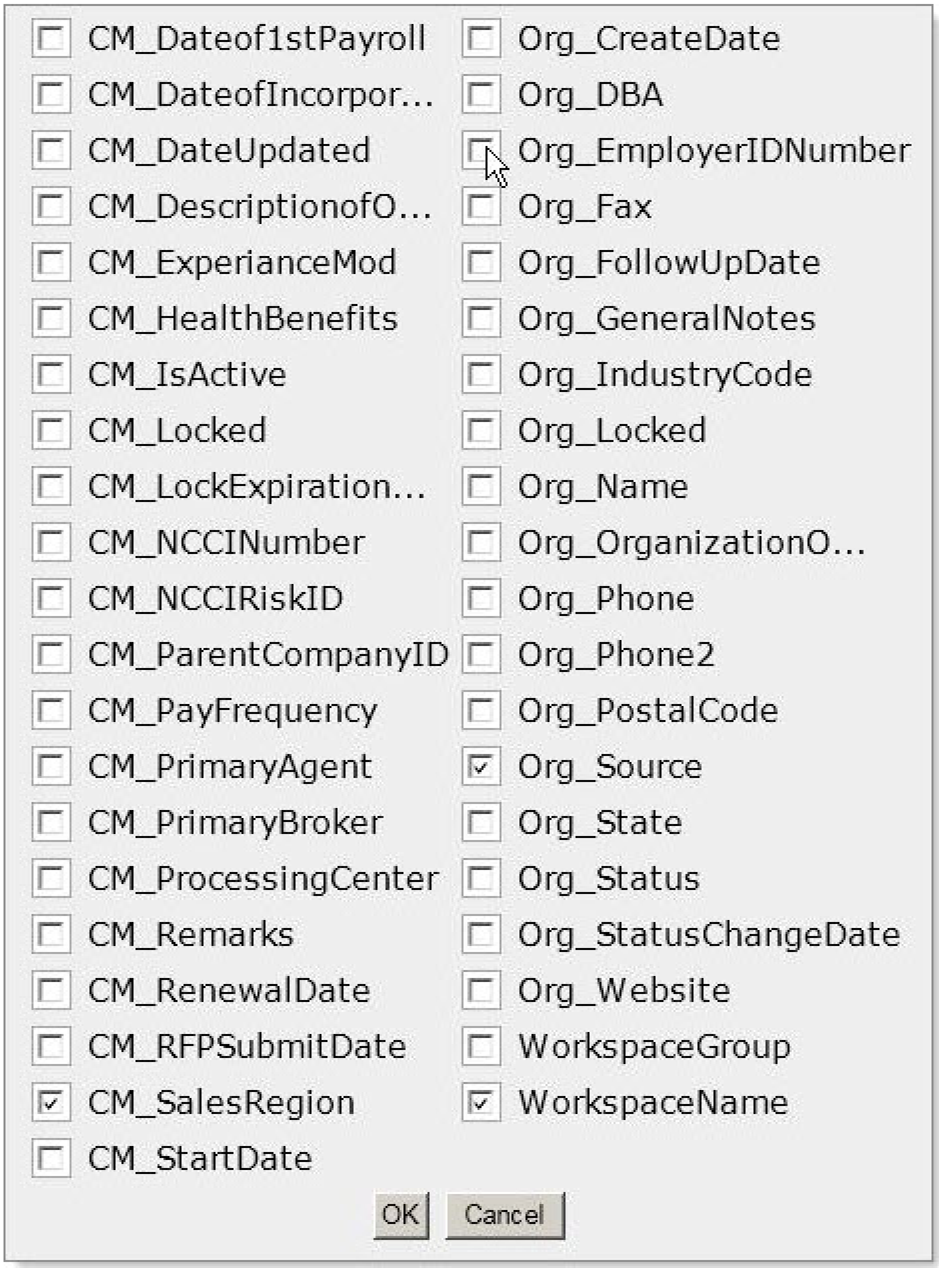


- The **Table** menu is a list of the tables and views available to the user. Select the desired table/view to preview. To join multiple tables or views that have a field with identical entries, select those tables/views.
- The **Join Field** menu is a list of the fields contained in the table/view selected in the Table menu to the left. Select the field that has identical entries as the table/view that it needs to be joined with.
- The **Foreign Table** menu is a list of the tables/views that have been selected in the Table menu, other than the one in that row. Select the table/view to join the table/view in that row.
- The **Field** menu is a list of fields in the table/view that are selected in the Foreign Table menu to the left. Select the field to join with the table/view in that row.
- The **Join Type** menu is a list of the available joining methods. The “Inner” method discards any objects from the joint fields that do not have an identical match. The “Left” method still displays those without an identical match.

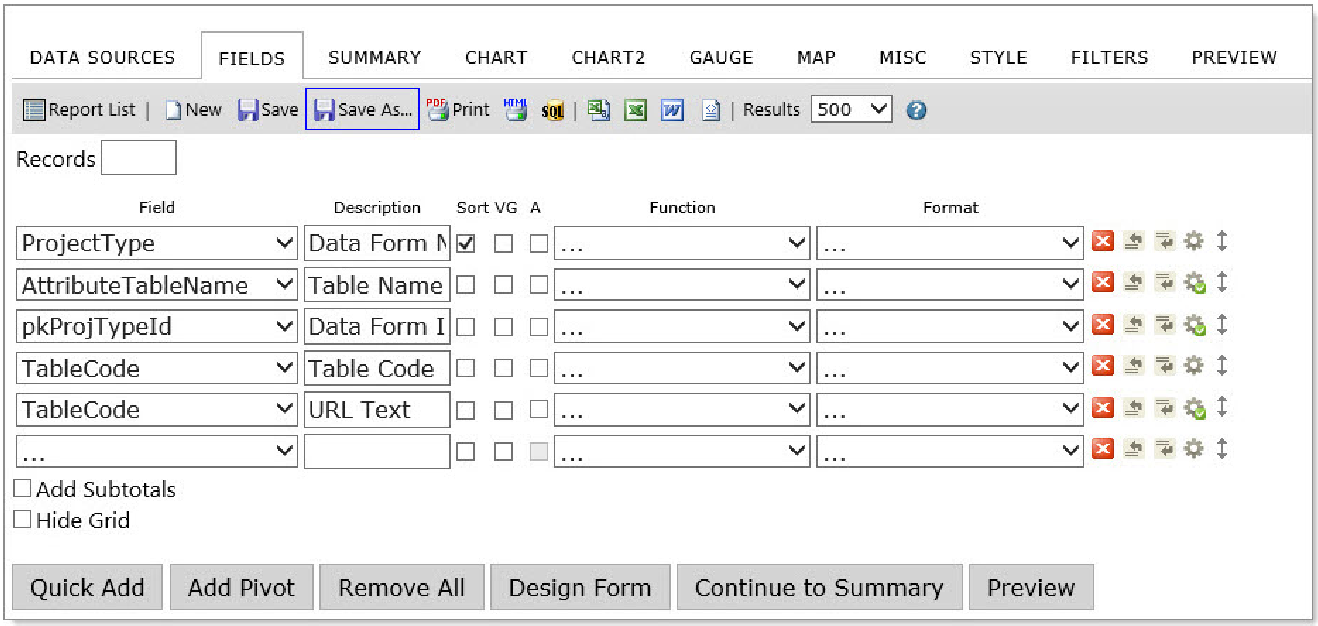
Icons	Control name	Description
	Delete	Click to delete the row.
	Insert Row (above)	Click to insert a row above the selected row.
	Insert Row (below)	Click to insert a row below the selected row.

Fields tab

1. The easiest way to get started it to use the **Quick Add**.



2. Select the fields and click **OK**.



3. After you have the selected the fields, you can perform a number of tasks, including changing the field label in the Descriptions column, changing the order, visually grouping (VG), and sorting.

   The Field drop-down menu is a list of the available fields in the table/view that is selected in the Data Sources tab. If joining tables/view, the title of the table/view that the field is from appears in parenthesis next to the name of the field. Select the fields to display. The entries in the list that are in Bold are the table/data source names.

   The Description field is the title of the field when the table/view is displayed.

Sort, Group, and VG options and Functions drop-down menu features

Features	Description
Sort (a-z)	Select this option if you want the table/view to be sorted by the field selected in the Field drop-down menu to the left in ascending order.
Sort (z-a)	This option is in the advanced properties of the row and can be set if you want the table/view to be sorted by the field selected in the Field drop-down menu to the left in descending order.
VG	Select this option to change the column for the field selected in the Field drop-down menu to the left into subheadings
A	Arithmetic – Performs basic calculations (+, -, x, %) and concatenation of text.
Function menu	Functions can be chosen from the menu. If the Group option is selected, a group of fields can be created.

The Format menu is a list of formats for the entries of the field selected in the Field menu directly to the left to appear in.

Format	Examples
Short Date	8/1/1996
Long Date	Friday, August 09, 1996
Short Time	12:34 AM
Long Time	12:34:56 PM
Full(short)	Friday, August 30, 1996 4:34
Full(long)	Wednesday, October 23, 1996 2:28:37 AM
D&T(short)	3/12/1996 7:45 PM
D&T(long)	2/27/1996 12:45:13 AM

The function buttons are for the rows that they are in

Control Name	Description
Delete button	Delete the row the button is on.
Insert Row button (above)	Insert a row above the row the button is on.
Insert Row button (below)	Insert a row below the row the button is on.
Move	Move a row up or down in the list. When moving a field, you have to use the blue bar to guide where you are placing it.
Advanced Properties++	Advanced field settings provide more granular control over what data is displayed in your report. They can be accessed by clicking on the gear icon to the right of any row on the fields tab or the summary tab in the report designer. There are several options that can be selected here. For more information on using Advanced properties click the expanding section below

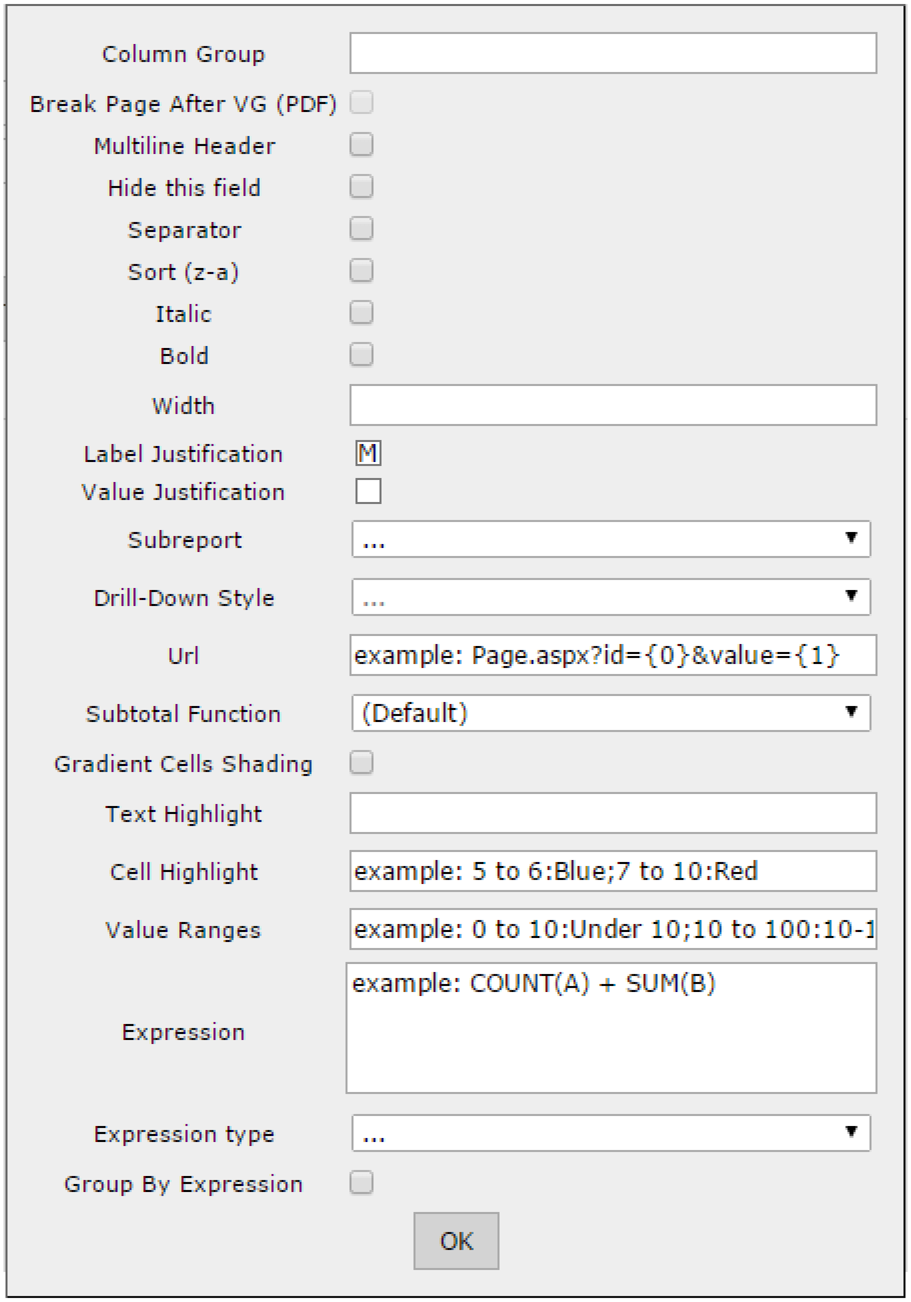
Features	**Description**
Quick Fields From Dialog menu	List of tables/views selected in the Data Sources tab.
Add Pivot	Allows the user to add a pivot table to a report
Continue to Summary	Allows the user to advance to the Summary Tab
Preview	Allows the user Preview the current report.

After you have finished, you can Continue to the Summary tab or Preview the report.

**Keep in mind that after you have selected your fields, you can preview the report at any time. This allows you to make the report look exactly the way you want through trial and error.

Advanced field settings

Advanced field settings provide more granular control over what data is displayed in your report. They can be accessed by clicking on the gear icon to the right of any row on the fields tab or the summary tab in the report designer. You can select several options.


Column Group
Break Page After VG (PDF)
Multiline Header
Hide this field
Separator
Sort (z-a)
Italic
Bold
Width
Label Justification
M
Value Justification
Subreport
...
Drill-Down Style
...
Url
example: Page.aspx?id={0}&value={1}
Subtotal Function
(Default)
Gradient Cells Shading
Text Highlight
Cell Highlight
example: 5 to 6:Blue;7 to 10:Red
Value Ranges
example: 0 to 10:Under 10;10 to 100:10-1
Expression
example: COUNT(A) + SUM(B)
Expression type
...
Group By Expression
OK

<table>
<tr><th>Setting Name</th><th>Description</th></tr>
<tr><td>Column Group</td><td>Applies a label to this column that can work over multiple consecutive columns. Any other column that shares the same label is included in the grouping.
<table>
<tr><th colspan="2">Shipping</th><th colspan="2">Finance</th></tr>
<tr><th>Ship Country ▲</th><th>Ship City</th><th>Count(Order ID)</th><th>Sum(Freight)</th></tr>
<tr><td>Argentina</td><td>Buenos Aires</td><td>89</td><td>$2,740.04</td></tr>
<tr><td>Austria</td><td>Graz</td><td>167</td><td>$34,344.69</td></tr>
<tr><td>Austria</td><td>Salzburg</td><td>49</td><td>$5,297.59</td></tr>
<tr><td>Belgium</td><td>Bruxelles</td><td>33</td><td>$2,094.05</td></tr>
<tr><td>Belgium</td><td>Charleroi</td><td>59</td><td>$4,179.19</td></tr>
</table>
</td></tr>
<tr><td>Page Break After Field</td><td>If the Page Break After Field box is checked and this field is also a visual group, then it triggers a page break in a printed report every time this field has different value.</td></tr>
<tr><td>Multiline Header</td><td>Multiline Header allows a header to be multi-lined if the length of the header is longer than set width of the column. Each space between words works as a line breaker.</td></tr>
<tr><td>Hide this field</td><td>Hides the field from display when report the is ran. Useful for using expressions on multiple fields but when only one of the fields should be displayed.</td></tr>
<tr><td>Separator</td><td>Breaks out Analysis Grid by this field. Functions identically to VG in a normal table. Because VG is used to define the hierarchy of the Analysis Grid, Separator should be used to visually group the Analysis Grid.</td></tr>
<tr><td>Sort (z-a)</td><td>Sorts in descending order.</td></tr>
<tr><td>Italic</td><td>Sets whether the column is shown in italics.</td></tr>
<tr><td>Bold</td><td>Sets whether the column is shown in bold.</td></tr>
<tr><td>Width</td><td>Set the width of the column in number of pixels.</td></tr>
<tr><td>Label Justification</td><td>Sets the Column label to the left, right, or middle of the row.</td></tr>
<tr><td>Value Justification</td><td>Sets the Value of the field to the left, right, or middle of the row.</td></tr>
<tr><td>Subreport</td><td>Sets the drill-down child report. The list contains only reports that have a drill-down key set for them. Note: The Automatic option attempts to choose a sub-report by matching the drill-down key to the selected field and cannot discern between two sub-reports that use the same drill-down key.</td></tr>
</table>

Setting Name	Description
Drill-Down Style	• Link: opens in same browser window • Link (New Window): opens in new browser window • Embedded: embeds the drill-down results into the main report • Popup: opens the results on a pop-up screen • Hover: Shows the sub-report when you hover the mouse over the item that the sub-report is linked to. • ComboKey: Used in combination with one of the above. When this setting is chosen for the second drill-down key, the value of both fields is passed from the main report to the sub-report. • Header Link: Used in a pivot to pass the value of the header (a value derived from the grouping of the pivot header column) to a sub-report. Additional values from the left side of the pivot can be passed using ComboKey or can be incorporated and hidden into the pivot itself.
Url	Allows you to define a custom URL to redirect to when the value in this cell is selected.
SubTotal Function	Sets a customized function for subtotals displayed with this field. The default value is Sum. This only applies to the bottom sub-totals and not the side sub-totals. If set to Expression then a box appears allowing you to set an expression for the subtotal. This functions in the same fashion as the typical expression box.
Gradient Cells Shading	Sets whether cells will use a gradient or solid color for shading. The larger the value in the cell is, the darker the shading. This gradient is determined by establishing a range of X to Y, where X is the lowest value in the column and Y is the highest and shading them proportionally where X is the lightest shade and Y the darkest.

Setting Name	Description
Text Highlight	Highlights the text for a given range. You can refer to the Styles tab for a list of valid colors or using an RGB hex code such as #ff0033. Syntax is given in the format a to b:color;c to d:othercolor:e to f;anothercolor and so on. For example: "5 to 6:Blue;7 to 10:Red". A colon is used to separate the range and value, semicolons are used to separate pairs of range:value arguments. A value given without a range after the first range:value pair acts as a conditional, for example: "1 to 10:Red;Blue" would color values between 1 to 10 red, and everything else blue. A range can be a single value. You may also use percentages to establish a range, such as 0% to 20%:Red. **Note:** It is easy to end your statement with a semicolon like this: "1 to 10:Red;11 to 20:Blue;" This throws an index error!
Cell Highlight	Highlights the entire cell for a given range. This follows the same rules as text highlight. You can use both cell and text highlight at the same time to provide contrasting colors, for example if you change the cell to a dark color you might change the text in that cell to a lighter color.
Value Ranges	Lets you set text values for number ranges. (setting this to 0 to 10:Under displays the text "Under" when it encounters a value between 0 and 10 for that column). This follows the same rules as text highlight.
Expression **	Allows you to define a customized mathematical or SQL expression to show as the value for the column cells.
Expression Type	Allows you to specify the data type of this field. This is most useful when you are generating output with an expression and need to specify a data type.
Group By Expression	If checked, this field is included in the group by statement of the query. This is functionally the same as the Group function, except applicable to expression output within a field rather than to the field itself.

Summary tab

On the summary tab you can select the field you would like to summarize.

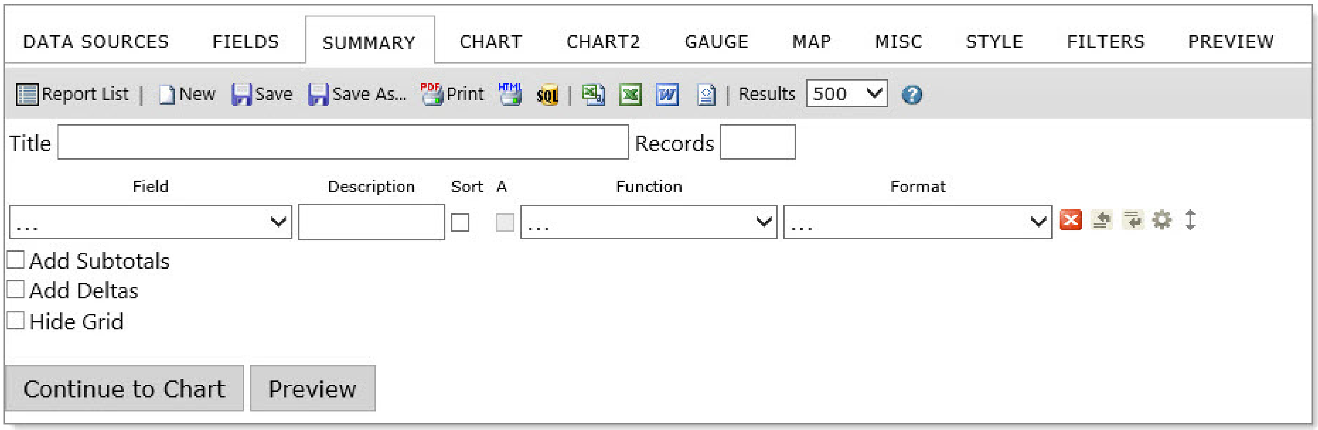
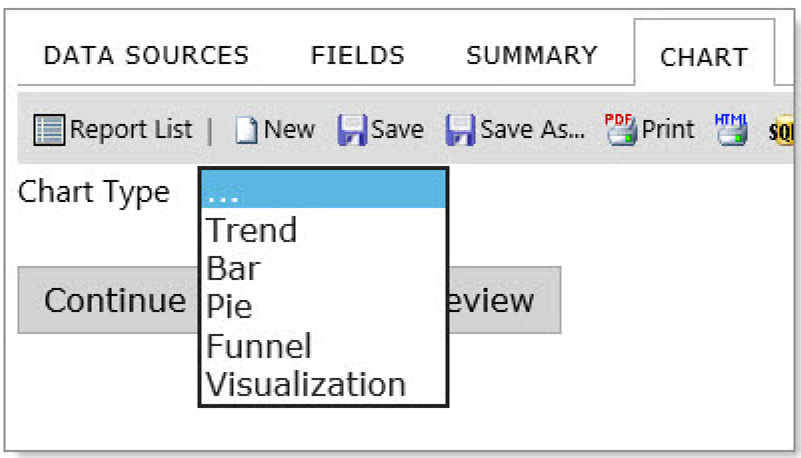
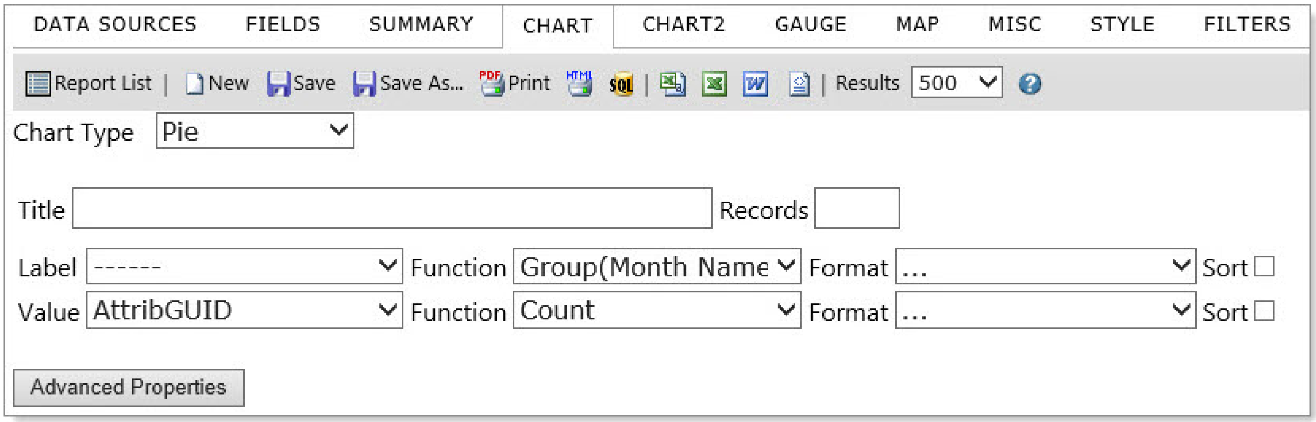


Chart tab

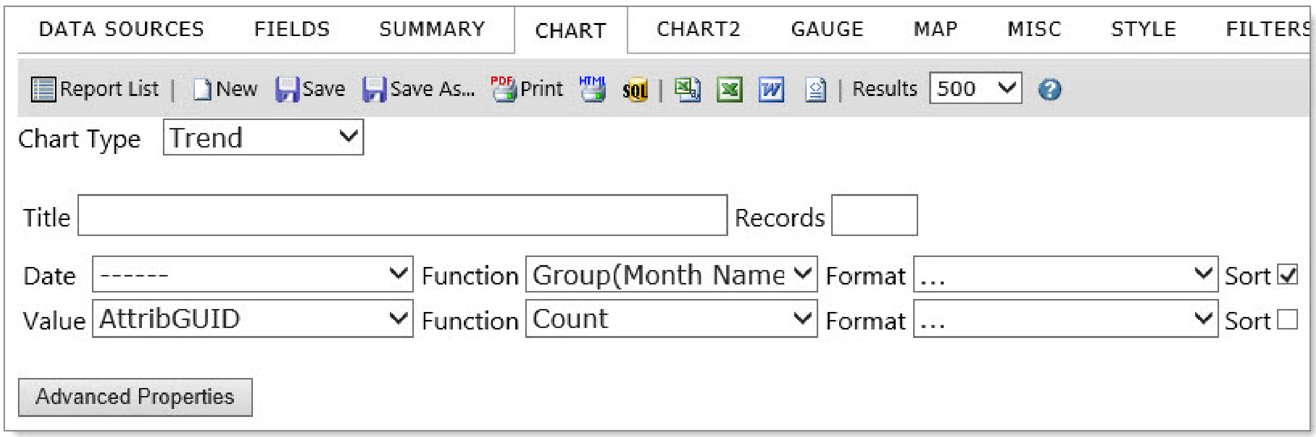
On the charts tab you can select which type of chart you would like to use. For this report we use the pie chart.



You can then adjust the Chart setting to your liking.

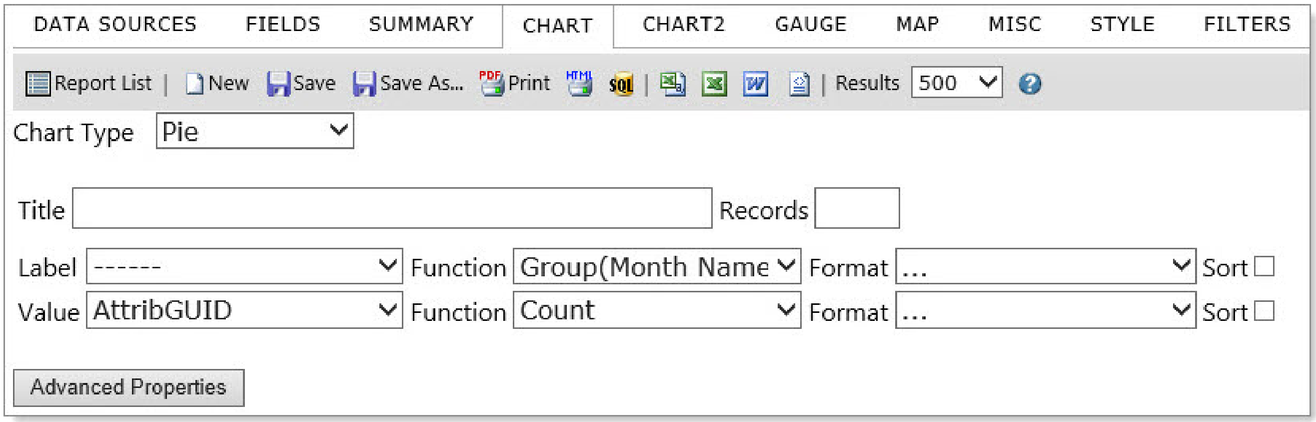


Trend chart



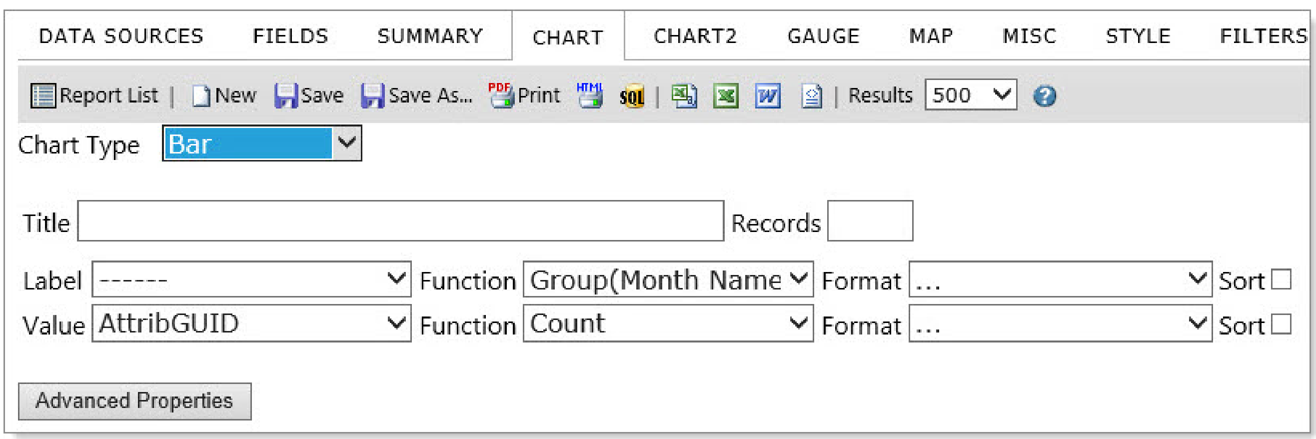
Features	Description
Trend chart	By choosing chart type Trend, the chart appears in Trend format.
Date menu	Choose any field of date format like birth date, join date, and so on.
Value menu	Choose any value from the list.

Pie chart



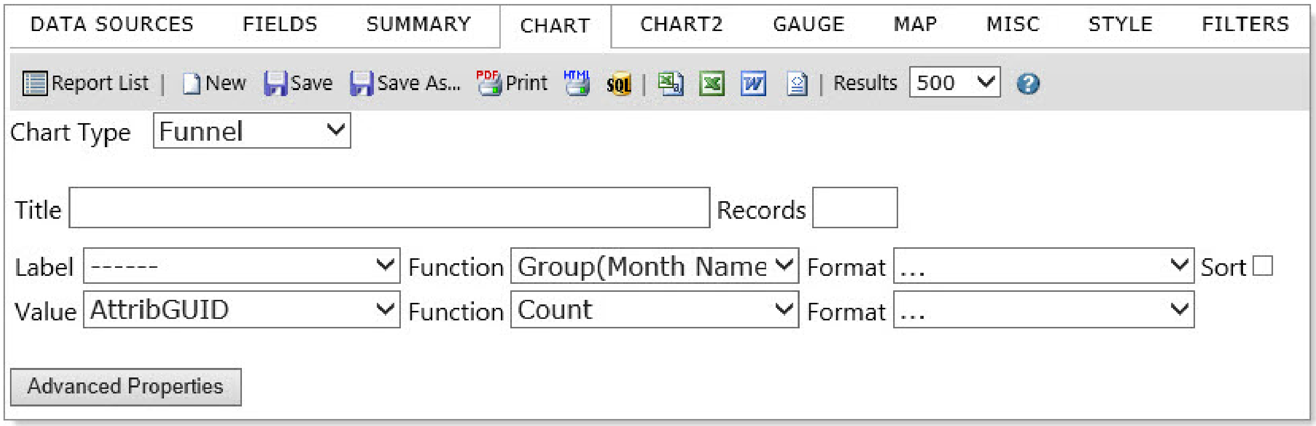
Features	Description
Pie chart	By choosing chart type Pie, the chart appears in Pie format.
Label menu	Choose any label from the list.
Value menu	Choose any value from the list.

Bar chart



Features	Description
Bar chart	By choosing chart type Bar, the chart appears in Bar format.
Label menu	Choose any label from the list.
Value menu	Choose any value from the list.

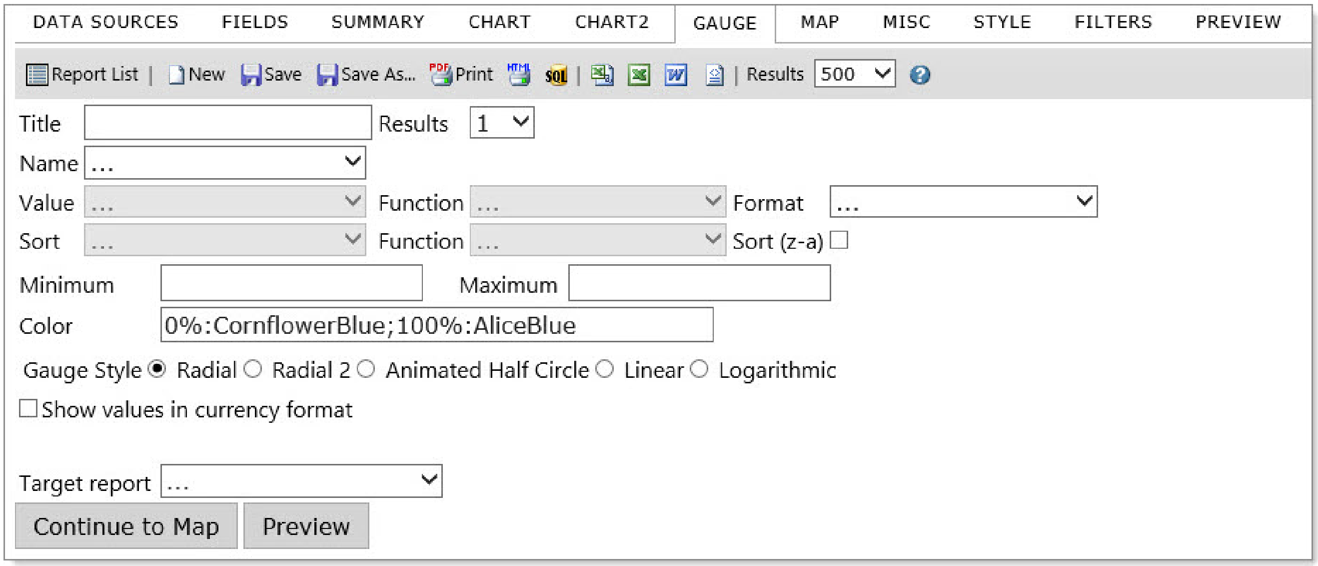
Funnel chart



Features	Description
Bar chart	By choosing chart type Bar, the chart appears in Bar format.
Title	Insert name for the chart.
Label menu	Choose any label from the list.
Value menu	Choose any value from the list

Gauge tab

Just like on the Chart Tab you can add panel or radial gauges to the report for any data you like. Use the preview tab to get just right.



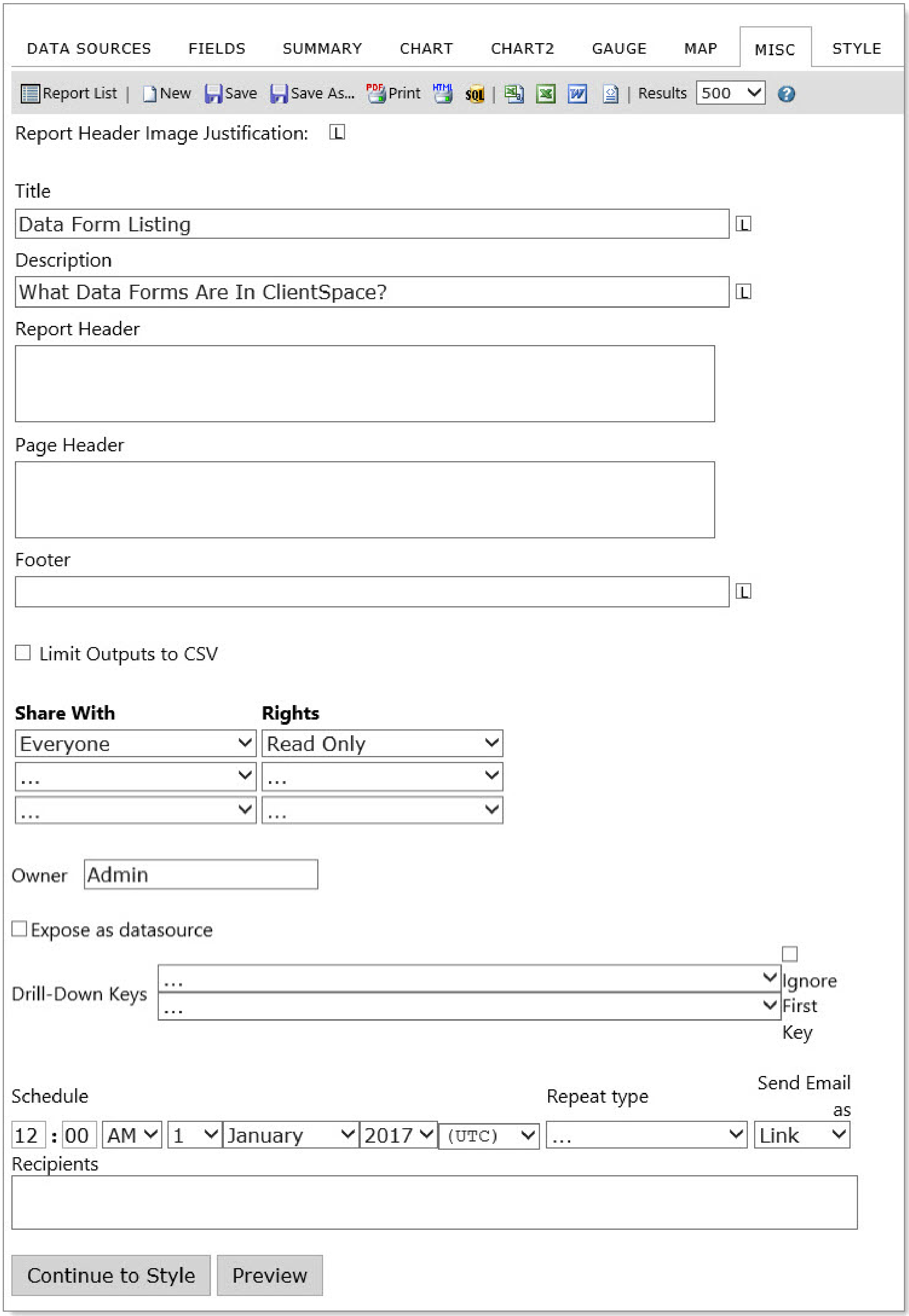
Results: Allows you to specify how many gauges you want to show, if you choose to count the number of products in multiple categories, you could specify that you want to only show the first 4 categories by alphabetical order.

- Name: Choose the gauge labels
- Value: Chose the field to which a function is applied.
- Function: Choose a function to apply to the field.
- Radial/Linear: Outputs a different style gauge.

Misc tab

Here you can edit the Report header, description, and footer. This is also where you adjust the permissions of the report. By default, reports are not shared with anyone. This allows you to build your own list of reports.

To share a report, select a role from the drop down list and then select the right you wish for that group to have. Please note that if the users you are sharing with do not have permissions to the data you are sharing they won't be able to see the report.


DATA SOURCES
FIELDS
SUMMARY
CHART
CHART2
GAUGE
MAP
MISC
STYLE
Report List | New Save Save As... Print | | Results 500
Report Header Image Justification:
Title
Data Form Listing
Description
What Data Forms Are In ClientSpace?
Report Header
Page Header
Footer
Limit Outputs to CSV
Share With
Rights
Everyone
Read Only
...
...
...
...
Owner
Admin
Expose as datasource
Drill-Down Keys
...
...
Ignore First Key
Schedule
Repeat type
Send Email as
12 : 00 AM 1 January 2017 (UTC) ... Link
Recipients
Continue to Style
Preview

Exposing reports as a data source

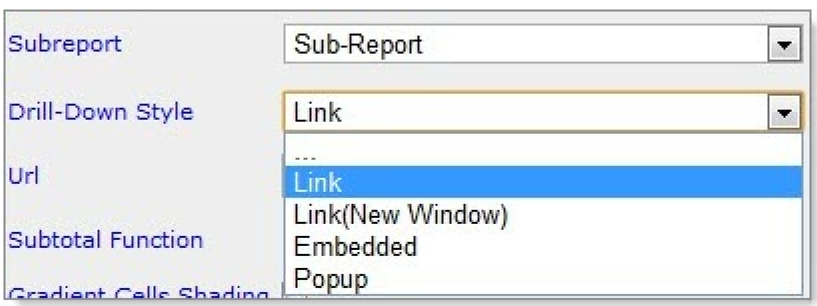
eIzenda BI reporting allows you to create your own data source reports by selecting the option **Expose as Datasource**. It is a best practice to ensure that the output of any Datasource report contains a foreign key that can be JOINED to other tables / Views in the main report.

Drill-downs and Sub-reporting

To create a drill-down report, you can start by designing the main report, but in order to be able to select a drill-down report, that sub-report must first have a drill-down key to show up in the selection list. This means it often makes more sense to work from the bottom up, from the lowest sub-report to the highest parent report.

A sub-report does not appear in the list of available sub-reports until it has a drill-down key defined. When this has been set and the report saved, any other report can access the sub-report in the list of available sub-reports. At this point you can define a drill-down style to control how the sub-report is accessed.

Select the Drill-down Type



Option	Description
. . .	Disables the drill-down without removing the link between this field and a subreport
Link	Opens sub-report in the same browser window
Link(New Window)	Opens sub-report in a new browser window
Embedded	Embeds sub-report in the table cell or directly into a form *NOTE* Please see section
Popup	Displays sub-report in a pop-up window. You must click on the pop-up to clear it from the screen.

Option	Description
Hover	Shows the sub-report on the same screen as an overlay when you hover over the current field, chart, or gauge. NOTE: This option is not available on the Fields Tab!
ComboKey	Indicates that this drill-down key is a second, third, or other key that is not the first key. The first key controls the drill-down style, and every other field with a target sub-report and the ComboKey behavior defined passes their value along with that first value, in field order.

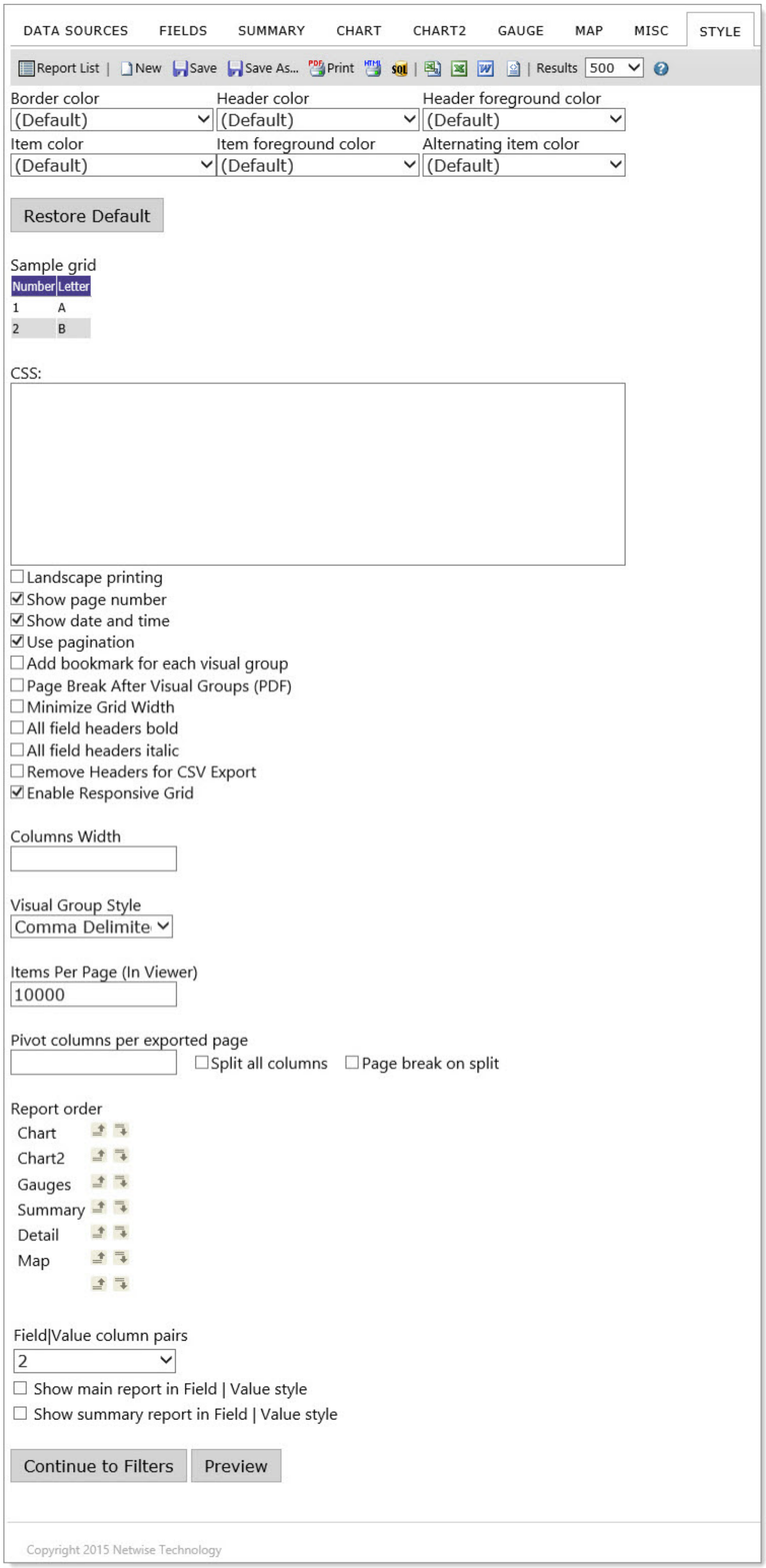
Scheduler

The scheduling controls may not be available to all users. If you do not see them, communicate with your system administrator.

- **Schedule**: Set the schedule date and time.
- **Repeat Type**: Set the repeat frequency.
- **Send Email As**: Set the format in which the email is sent.
- **Recipients**: Enter a comma separated list of recipients.

Style tab

The style tab is where you can further adjust the look and feel of the report. You can change the color of the border, header, and rows. One of the more common tools on this page is the ability to adjust the order in which the report items displays. Use the preview tab to get just right.


DATA SOURCES
FIELDS
SUMMARY
CHART
CHART2
GAUGE
MAP
MISC
STYLE
Report List | New Save Save As... Print | Results 500
Border color
(Default)
Header color
(Default)
Header foreground color
(Default)
Item color
(Default)
Item foreground color
(Default)
Alternating item color
(Default)
Restore Default
Sample grid
Number Letter
1 A
2 B
CSS:
Landscape printing
Show page number
Show date and time
Use pagination
Add bookmark for each visual group
Page Break After Visual Groups (PDF)
Minimize Grid Width
All field headers bold
All field headers italic
Remove Headers for CSV Export
Enable Responsive Grid
Columns Width
Visual Group Style
Comma Delimite
Items Per Page (In Viewer)
10000
Pivot columns per exported page
Split all columns
Page break on split
Report order
Chart
Chart2
Gauges
Summary
Detail
Map
Field|Value column pairs
2
Show main report in Field | Value style
Show summary report in Field | Value style
Continue to Filters
Preview
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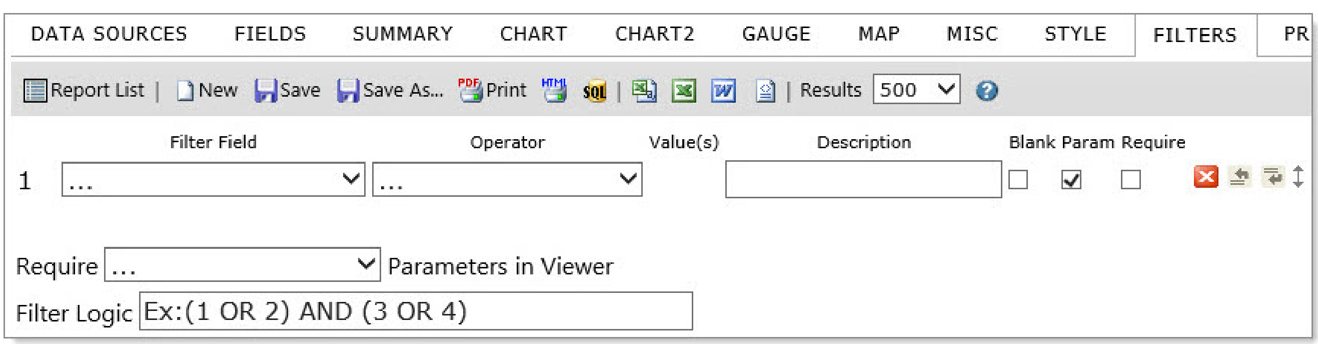
- Report style properties can be changed using the drop-downs, when the properties are changed, the sample grid below can be used to see the differences.
- The colors which can be changed are: Border color, Header color, Header foreground color, Item color, Item foreground color, and Alternating item color.
- Explanations of other properties found on tab are given below.
- Landscape printing: Determines whether the report prints in landscape mode. (It can also be set using print properties in the printer dialogue box)
- Show page number: Sets whether the page numbers are shown in pdf report exports.
- Show date and time: Sets whether the date and time are shown in pdf report exports.
- Use pagination in web view: Sets whether pagination is used in the report viewer.
- Add bookmark for each visual group: Sets whether bookmarks are used in adobe pdf exports.
- Page Break After Visual Groups: Set page breaks for each visual group in pdf report exports.
- Minimize Grid Width: Minimizes the grid width in Preview mode.
- Visual Group Style: Sets whether the visual group labels are shown.
- Items per page: Allows a user to set the number of items show per page in a grid.
- Report order: Allows the user to set the order of the Summary, Chart, Gauges and Detail grids
- Field|Value column pairs: Allows a user to set the field value style. This is useful for Accounting/financial reports.
- Show main report in Field | Value style: Allows a user to set whether the main detail grid uses Field-Value style.
- Show summary report in Field | Value style: Allows a user to set whether the summary grid uses Field-Value style

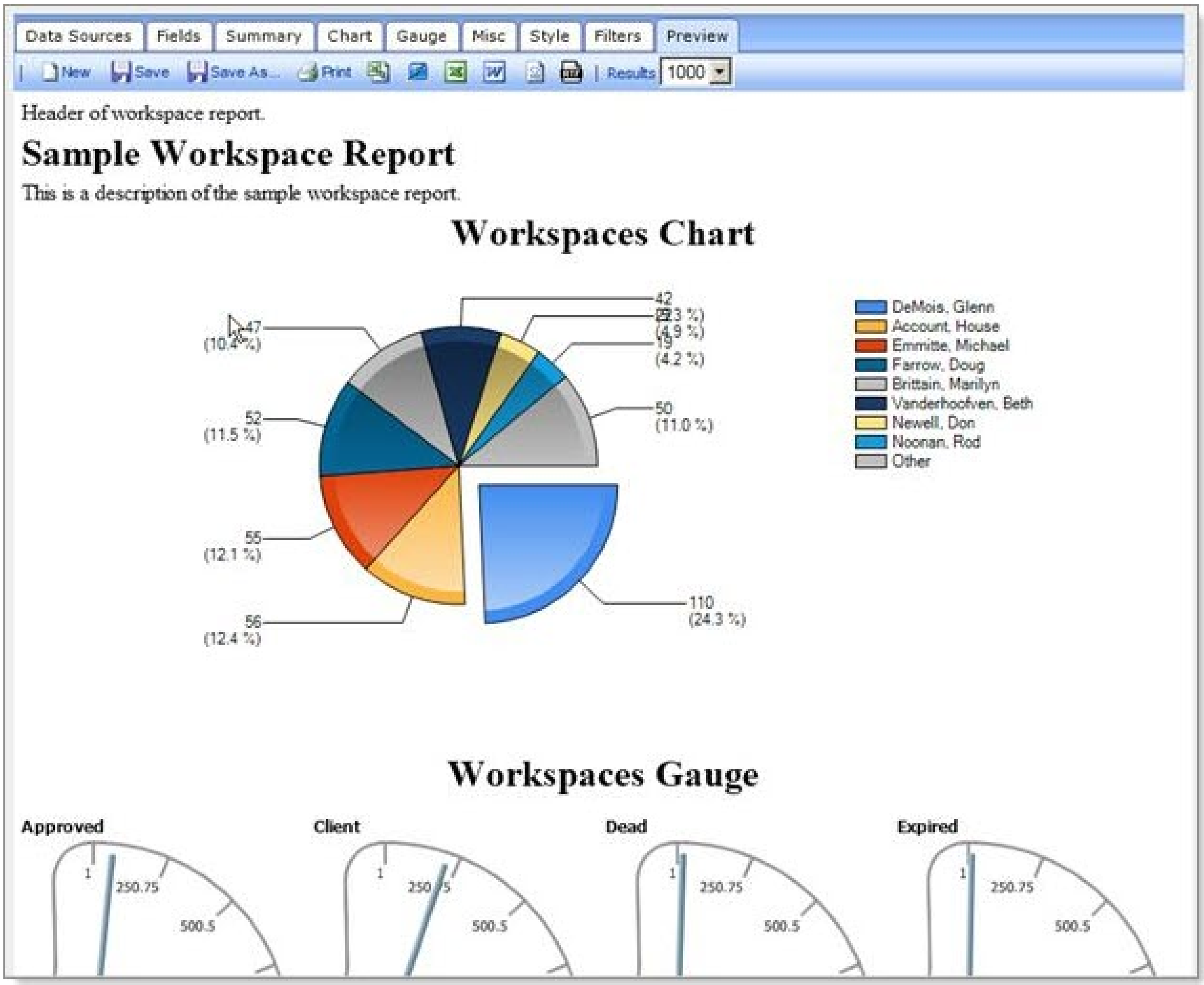
Filters tab

Here you can filter the data using field selector and operator tool. If you leave the Param box selected, you can adjust these filters when running the report. This is useful when sharing a report and only giving read rights.



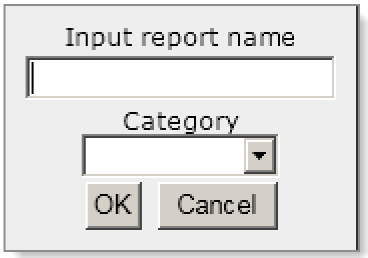
Preview tab

The Preview tab provides a preview of the report. It defaults to the first 500 rows. Filters that would be adjustable at runtime are not visible in Preview mode.



Save or export

You can save the report to your list of reports. Keep in mind that the lists of categories are global, so please do not add new unless it is a must. Please use the ones already there.



Learning how: Database fundamentals

This video provides information about data structure and report design.

Video

Watch the video Database Fundamentals.

Learning how: Joining data to create the report

This video demonstrates how to use table data to join information between tables. Then using the primary and foreign keys, we use that dataset to pull individual pieces of information from each of the forms.

Video

Watch the video Join Data to Create the Report.

Learning how: Building the report

This video examines the Fields and the Summary tabs, demonstrating how to create a usable report.

Video

Watch the video Building the Report.

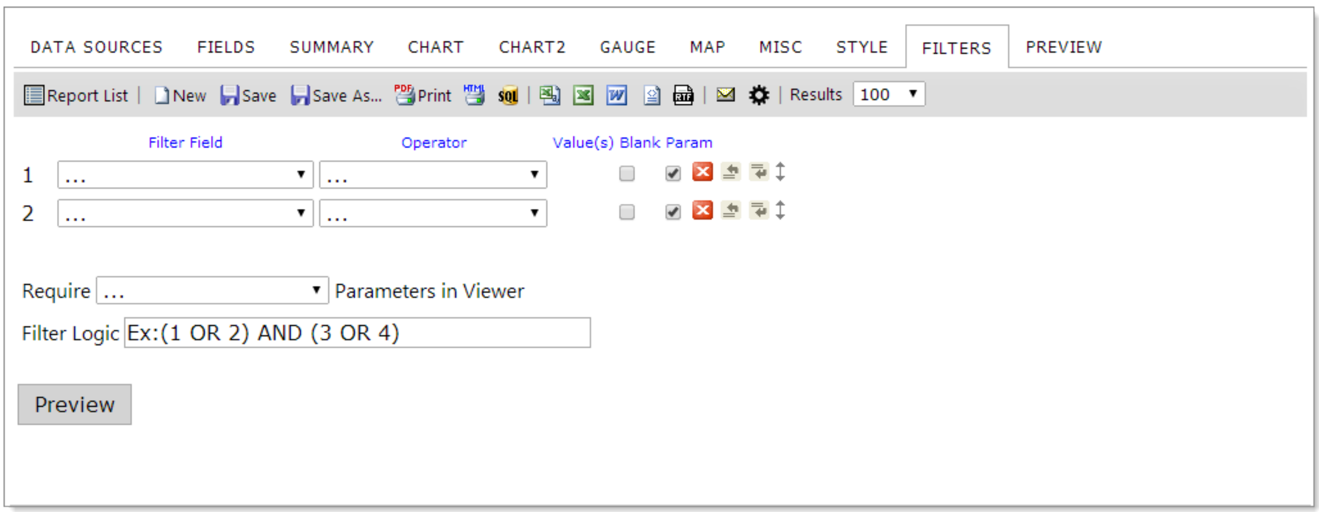
Report filters

One of the trickiest parts of building a Business Intelligence (BI) report or dashboard is ensuring the filters that are applied are selecting the values you would like (and only the values that you would like) to be returned to the report at runtime.

This topic includes instructions sourced from the Izenda wiki guide to report design. We have provided some useful information when designing and building Izenda Reports and information specific to using BI within ClientSpace.

Filters tab

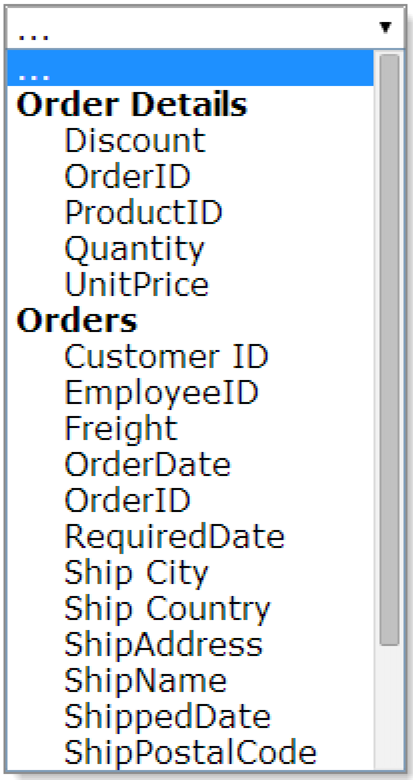
In the Filters tab, the fields of the table/view chosen in the Data Sources tab can be filtered so that only pertinent entries appear in the table.



Filter Field drop-down menu

The Filter Field drop-down menu is a list of the available fields in the table/view that have been selected or created in the Data Sources tab.

1. Simply select the field you want to filter on from the drop-down menu.
2. If you are joining tables/views, the title of the table/view that the field is from appears in parentheses next to the name of the field. The following figure demonstrates what the filter field drop-down looks like with joined tables.



Note: Calculated fields can sometimes also be used as report filters. These calculated fields appear at the very bottom of the Datasource fields list.

Filter Operator drop-down menu and value(s)

The Filter Operator drop-down lets you select your operator based on the data type that has been selected in the filter. The filter fields available are only those under the Tables or Views selected in the Data Sources tab.

Operator categories

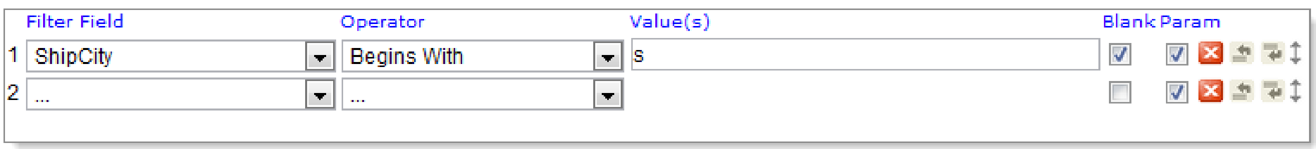
Type	Filter	Description
Comparison	Is Less Than	Displays only items whose values are less than the input values.
Comparison	Is Greater Than	Displays only items whose values are greater than the input values.

Type	Filter	Description
Comparison	Between	Displays only items whose values lie between the input values.
Comparison	Isn't Less Than	Displays only items whose values are not less than the input value.
Comparison	Isn't Greater Than	Displays only items whose values are not greater than the input value.
Comparison	Isn't Between	Displays only items whose values are between the input values.
Equivalence	Equals	Manual text entry of the comparison value(s) separated with commas for easy copy/paste from CSV.
Equivalence	Equals(List)	Manual text entry of the comparison value(s) separated by intelligently parsed delimiters. User delimiter use must be consistent. For example, of consistent use: 1, 2, 3, 4 or 1-2-3-4 or 1 2 3 4.
Equivalence	Equals(Auto-complete)	Manual text entry of the comparison value(s) that displays a list of options as you type. Separate each value with a comma.
Equivalence	Equals(Select)	Select a single value from a drop-down list.
Equivalence	Equals(Multiple)	Select multiple values from a scrollable list. Use Ctrl+click to highlight multiple values (command+click on Mac).
Equivalence	Equals (pop-up)	Select of multiple values from a pop-up list of options.
Equivalence	Equals (Tree)	Select groupings of values based on a hierarchy. **NOTE**: This is not a default Izenda filter. Please see this page for more information.
Equivalence	Doesn't Equal	Exactly the opposite of equals.
Equivalence	Doesn't Equal (Select)	The opposite of Equals (Select).
Equivalence	Doesn't Equal (Multiple)	The opposite of Equals (Multiple).
Equivalence	Doesn't Equal (pop-up)	The opposite of Equals (pop-up).

Type	Filter	Description
Equivalence	Doesn't Equal (Tree)	The opposite of Equals (Tree).
Field Comparison	Is Less Than (Field)	Allows you to compare one field to another. Determines if the first field is less than the second field.
Field Comparison	Is Greater Than (Field)	Compare if one field is greater than another field.
Field Comparison	Equals (Field)	Determines if one field value equals another. This is useful for joining tables on multiple fields.
Field Comparison	Not Equals (Field)	The opposite of Equals (Field).
Date/Time	Between (Calendar)	Select two dates from a calendar pop-up on which to filter. This filter is inclusive – any dates equal to or between the specified values are included. This can be changed to a manual text entry field by modifying the ShowBetweenDateCalendar in the AdHocSettings.
Date/Time	In Time Period	Select from a list of time periods to filter on. See more about Adding new time periods.
Date/Time	Less Than Days Old	Single numeric entry to represent the days and uses that as a filter.
Date/Time	Greater Than Days Old	The opposite of Less Than Days Old
Date/Time	Equals Days Old	Filters on records that are only as many days old as you specify.
String	Like	Determines if the value of the field contains the given text.
String	Begins With	Determines if the value of the field begins with the given text.
String	Ends With	Determines if the value of the field ends with the given text.
String	Isn't Like	The opposite of Like.
Boolean	True	Determines if the value in the field is true.

Type	Filter	Description
Boolean	False	Determines if the value in the field is false. Values other than the number 1 and the text **(T|t)rue** is interpreted as false.
Available for All	...	Selected when no filter is used.
Available for All	Blank	Is the field blank?
Available for All	Isn't Blank	Is the field not blank?
Available for All	Use Previous OR	String together a number of fields in an OR condition as long as all fields utilize the same type of data values, such as Yes/No lookups or date fields.

Blank and Param options



The Blank and Param options allow you to control the filtering behavior in the report viewer. They do not affect the Preview tab of the report designer.

Blank: To use this, first set a Filter Field and then set an Operator. A value can be entered, but it is not required. If Blank is enabled, the filter returns data that matches the Value drop-down/textbox and also data that has a null value in that field.

In the example above, if Blank is enabled and then viewed in the report viewer, then the user would see all of the data where the ShipCity begins with **s** or are null.

Param: To use this, first set a Filter Field, set an Operator, and then set Value, as in the previous example. This displays the filtered report in the report viewer and allow the user to change the filter value. If it is not enabled, then the filter is not visible to the end-user and the end-user will not be able to change the filter.

In the example above, a user can change the **s** to a **t** and update the report.

Other buttons on the Filters tab

The (**Delete**), (**Create Above**), (**Create Below**), and (**Move**) functions of the Filters tab are shown below.

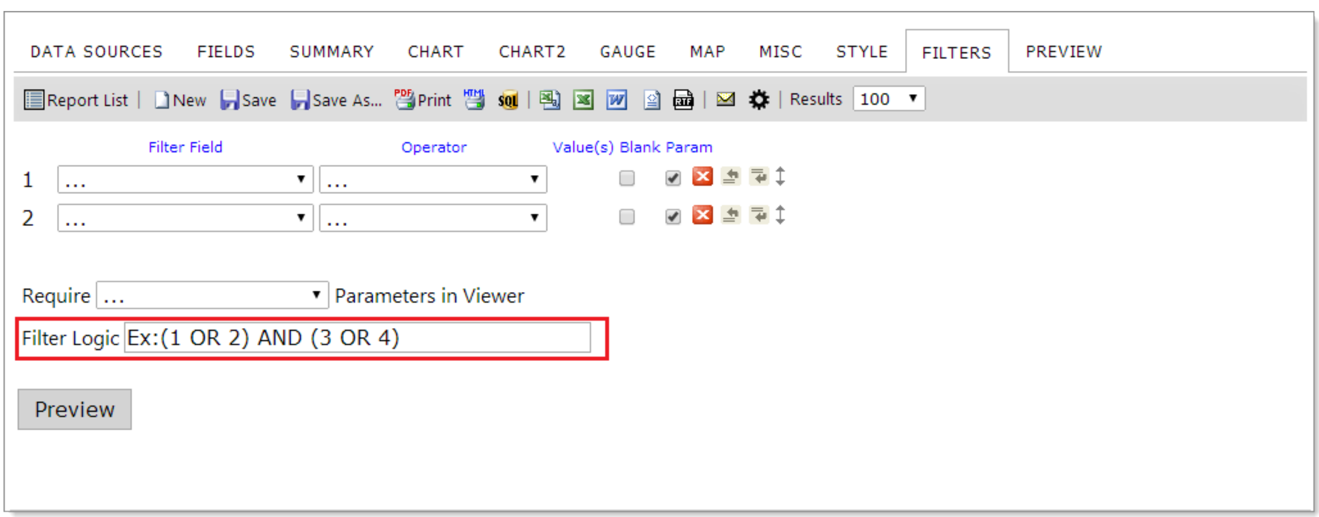
Icon	Control Name	Description
	Delete	Delete the row the button is on.
	Insert Row Above	Insert a row above the row the button is on.
	Insert Row	Insert a row below the row the button is on.
	Move	Allows users to move a row up or down in the list. You must click and drag until you see the space between rows is highlighted and release the mouse button to drop it.

Other Filter features

Feature	Description
Show Filters in Report Description	Adds the filters being used to the Description field of the report when the report is viewed in the Report Viewer or is exported
Require [blank] Parameters in Viewer	Sets the number of filter parameters the user must set when accessing this report in the Report Viewer.
Filter Logic (Conditional Filtering)	Ex: (1 OR 2) AND (3 OR 4). See more about Advanced Filter Logic (see below)

Filter logic (conditional filtering)

Izenda Reports allow you to have an arbitrary number of filters on a new report. These filters can even be applied with custom logic that you define. This is done with the advanced logic filter.



The text box on the Filters tab labeled Filter Logic is where you configure this logic. By default, there is an example filter already populated into the box to guide users in the format they should use. This filter logic works much like the Condition Expressions used in ClientSpace for custom link display conditions.

Changing the contents of this box causes Izenda to attempt to apply this logic to the filters on the report when Preview is selected or when the Report Viewer is accessed for this report. Using the example, "(1 OR 2) AND (3 OR 4)", results are filtered conditionally based on meeting either Filter 1 or Filter 2 in addition to meeting either Filter 3 or Filter 4. You can construct simple to extremely complex logic using this control. If you have a mere two filters, a simple "1 OR 2" forces your results to meet either the first or the second filter condition. Alternatively, you can nest parenthesis and combine logical operators to form sophisticated advanced filters.

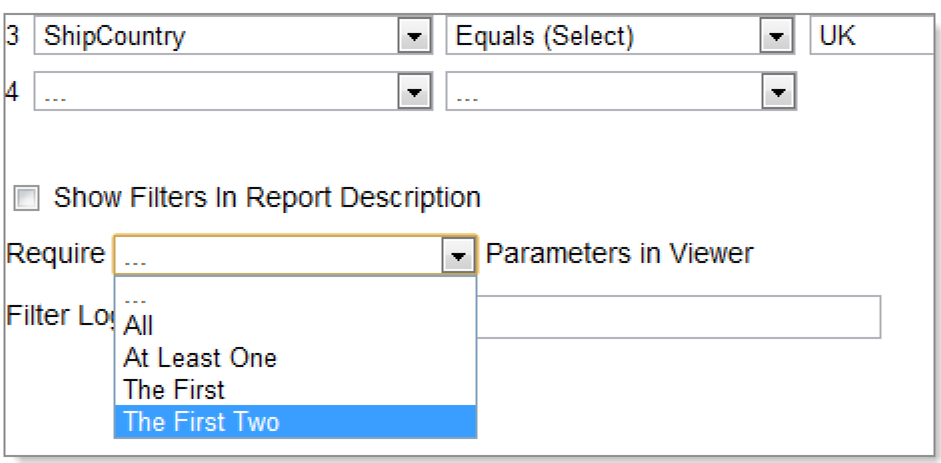
Note: Filter logic is applied hierarchically, left to right. In the example **(1 OR 2) AND (3 OR 4)**, the dataset returned is filtered by (1 OR 2) before assessing AND (3 OR 4) condition. This means that any records removed by filters 1 or 2 are not available to meet the second part of the condition AND (3 OR 4).

Note: When you update filter logic, it updates filter values but does not trigger the cascading filter check. Cascading only kicks in on filter value selection or filter refresh. Because the filter logic update does not trigger the cascading filter check, this could leave some filter values removed that do not need to be removed. For example, if we remove some criteria from a lower filter that would cause a prior filter to remove that value from the filter list, then when the lower filter value is removed while logic is changed it might prevent the upper filter from refreshing properly.

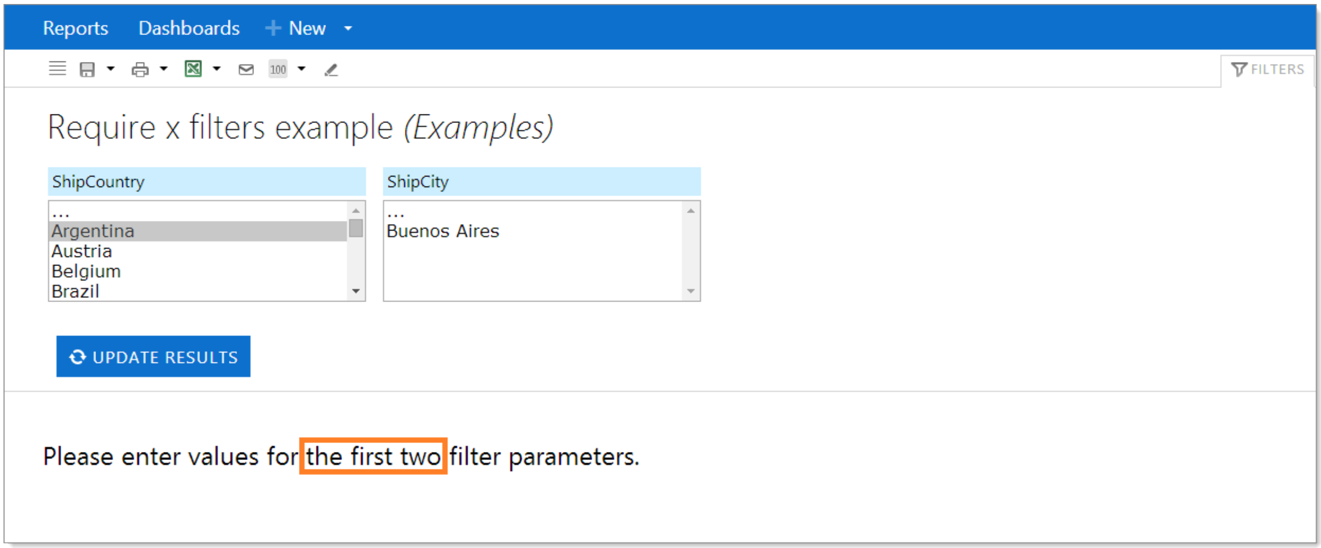
Note: A best practice is to add all required filters to a report before adding/changing the filter logic.

Require [blank] Parameters in Viewer

The following example requires the user to select at least two parameters before the report will run in the Report Viewer.

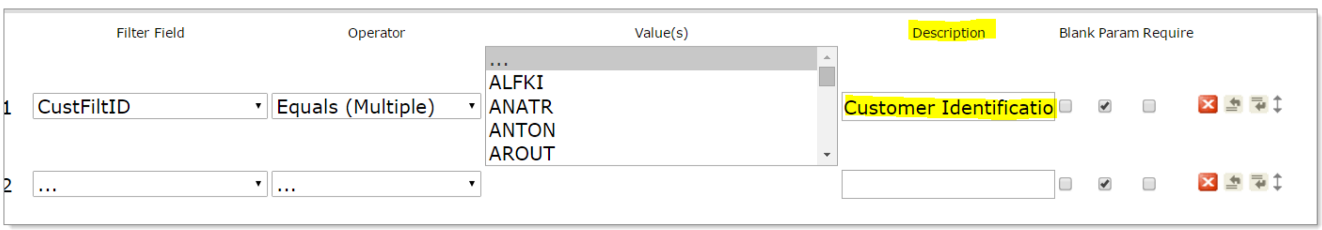


And here is what the user sees when attempting to access the report.

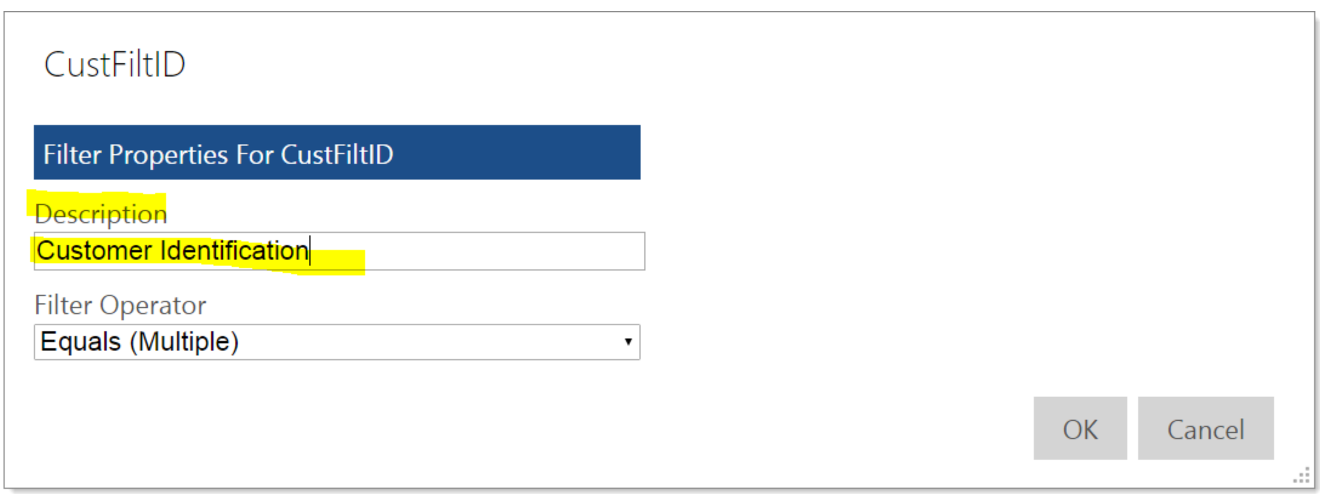


Alias Filter field names

The filter field name can be aliased using the Description field. This can be accessed in the Report designer from the filter tab or from the viewer by clicking the gear icon in the filter. Here the Description can be entered in the Report Designer Filter Tab.



And here is the description field in the Report Viewer by clicking the gear icon on the filter.



Dashboard reports and filters

It is important to understand that when constructing a dashboard with filtered data, the included reports which you have added to the dashboards tiles must either run independent of passed filters (such as a report using the #CurrentUser flag) or must all share the filter parameters that are passed in from the dashboard which calls them.

Dashboards

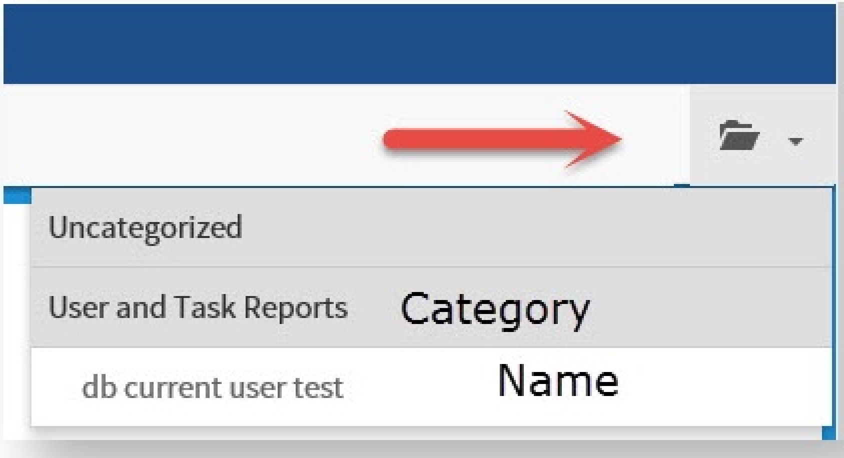
This topic describes the creation and management of dashboard reports using the Business Intelligence module in ClientSpace. This integrated application from Izenda automatically converts any existing dashboards to the new dashboard format. While previous versions were limited to a static structure for the dashboard, tiles can now be resized. Users can also add new tiles to any point on the grid in the Dashboard Designer. The dashboard displays with more fluid animation as well. The Dashboard Designer/Viewer also includes a presentation mode, which allows the user to slide through dashboard tiles on a carousel.

Creating ClientSpace modules from BI objects

Business Intelligence allows you to create dynamic reports and dashboards which can include Charts and graphs to help you manage your time and clients. Getting to these reports and dashboards however can sometimes be onerous. The following step-by-step guide helps you add your BI reports and dashboards to ClientSpace as a module. Use the following information to help you Create ClientSpace modules from business intelligence objects such as reports and dashboards.

To create a module from a BI dashboard:

1. Review the dashboard in Business Intelligence. You should see the category of the Dashboard as the top level.
2. Expand the area under the Dashboards folder and select to expand the Dashboards in that category.



3. Write down the category name and dashboard name exactly as they appear in the BI interface. Use this information later.
4. Go to **System Admin** > **Modules**.
5. Click **Add**.
   The add module dialog opens.
6. Complete the following fields.

Module Name (required)	Provide a meaningful name for your module, this is displayed in the modules list in ClientSpace.
Category (required)	Select a module category that fits with your module purpose.
Description	Type a brief description of your module. This appears in the module select lists.
Target	Type **new** to have the module open in a new tab of the browser. Proper formatting of BI modules require them to be opened in a new tab.
Module Type	Select **Business Intelligence**.
Module URL (required)	Format the URL in the following manner: `/BusinessIntelligence/Dash.aspx#/#DashboardCategory#\#DashboardName#`

	replacing *#DashboardCategory#* and *#DashboardName#* with the actual category and name as it appears in Business Intelligence. So, for the example in the screenshot, the URL is: `/BusinessIntelligence/Dash.aspx?rn=User and Task Reports\db current user test`

7. **Save** your module.

For a module created from a BI Report:

Configuring a BI report as a module is much the same as configuring a dashboard.

1. Follow Steps 1 - 3 (previous procedure) for configuring a module from a BI Dashboard.
2. When the Add dialog opens, complete the following fields:

Module Name (required)	Provide a meaningful name for your module, this is displayed in the modules list in ClientSpace.
Category (required)	Select a module category that fits with your module purpose (Reports may be the most appropriate).
Description	Type a brief description of your module. This appears in the module select lists.
Target	Type **new** to have the module open in a new tab of the browser. Proper formatting of BI modules require them to be opened in a new tab.
Module Type	Select **Business Intelligence**.
Module URL (required)	Format the URL in the following manner: `/BusinessIntelligence/ReportViewer.aspx?rn=#ReportCategory#\#ReportName#` replacing *#ReportCategory#* and *#ReportName#* with the actual category and name as it appears in business intelligence. The easiest way to ensure proper formatting is to copy the important bits from the browser URL when you run the report. After saving the module, any slashes that appear in the URL are replaced automatically with %5C.
ClientSpace	Select this option to make the module available.

3. **Save** your module.

After the module is saved, it is available from the Modules list, or you can add to the list of modules associated with your user profile.

Adding underlying ClientSpace data to Business Intelligence reports

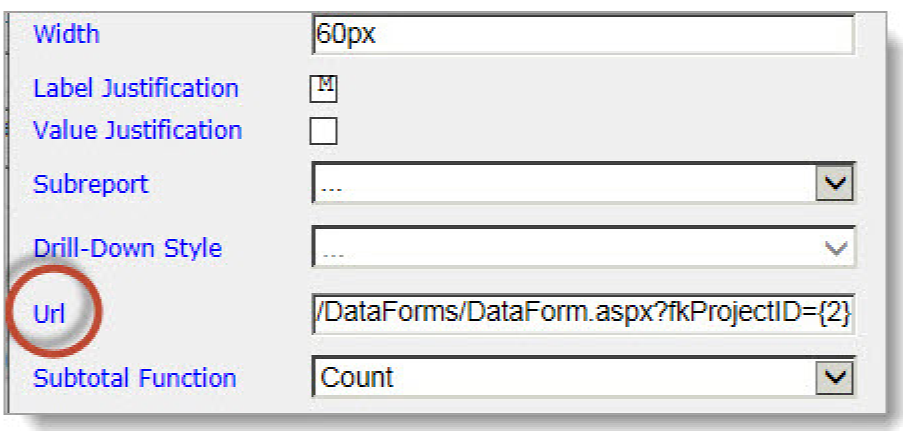
You can add functionality to Izenda reports by drilling into ClientSpace records from ad-hoc reports.

The numbers in curly braces are the field positions for the parameter you want to pass, so {0} indicates the field you are on, {2} indicates the second column (field) in the Izenda report. It is important to know that fields (columns) that are visually grouped in a report are not included when counting columns for use in these parameter curly braces. So if the first two fields on your report are visually grouped and you wanted to send the parameter in field #4, you would actually use {2} unless the link is on field 4 in which case you would use {0}.

By using the following code samples and the appropriate data fields, you can add robust functionality to ad-hoc reports.

To add linkto drill-down functionality inline on a report:

1. Add the following codes (see the following list) on the **Fields** tab > **Advanced Field Settings** > **Url** field.



Standard formatting is as follows: /next/linkto/{TableCode}/{ID}

- **next/linkto** : Alerts BI that you are creating a link to another record.
- **{TableCode}** is the predetermined Code of the dataform or core table that you want to link to. This code is hardcoded into the URL you are embedding into your report.

- **{ID}** is the key of the detail record you want to drill into and is dynamically replaced in your URL by Izenda. Keep in mind that **Visual Group fields on reports do not count** when figuring the order.

Dataform TableCode: You can link to dataform pages with the following format:

- /next/linkto/clientservicecase/{ID}

A new column, called **TableCode**, has been added to the ProjectTypes table, this has been defaulted to the AttributeTableName with the "gen_" prefix stripped off.

So, in the example , it uses the TableCode **clientservicecase** to hit the ProjectTypes table, find the associated ProjectTypeID, and build the URL to the dataform edit page with that ProjectTypeID and the provided RecordID.

Core TableCode: You can also link to Core detail page through this mechanism, a predefined set of core TableCode-to-detail page URL mappings are checked first:

• Organization	usage: /next/linkto/organization/{ID}
• Contact	usage: /next/linkto/contact/{ID}
• Workspace	usage: /next/linkto/workspace/{ID}
• Task	usage: /next/linkto/task/{ID}
• Activity	usage: /next/linkto/activity/{ID}
• TimeTracker	usage: /next/linkto/timetracker/{ID}
• User	usage: /next/linkto/user/{ID}

Secondary TableCode: If the specified TableCode is not found in the list of known core/peo TableCodes, it then hits tblTableMetadata, where there are two new columns: TableCode and DetailUrl. It uses the specified TableCode to lookup the tblTableMetadata row with the matching TableCode, and pull the associated DetailUrl field, it looks for the string {ID}, and replace it with the record Id that was passed to the LinkTo page.

So, if you have a row in tblTableMetadata with a TableCode = "Foo", and a DetailUrl = "~/foo/bar/{ID}

Then, embed a link using the LinkTo page like this: `/next/linkto/foo/123`

An example of this is /next/linkto/workspace/{0} where the Projects Table entry in tblTableMetadata has been updated to allow direct linking to the Workspace Landing Page.

A few caveats

- * None of these new columns (TableCode or DetailUrl) are exposed on the UI. Look directly in the database, or run an Ad Hoc report to see the values.
- *New values can be added on request by PrismHR.

- * When you load up a detail page from the Link To page, you don't get your modules across the top nav, nor do you get the user name drop-down in the upper right of the top nav. This is by design. This is meant to be a stripped down version of the navigation, for drilling into detail pages.
- *To encode a link to the **Pricing Console** of a workspace, use the following format in the fields **Advanced | Url** field: /next/PEO/PricingConsole/pricingconsole/{projectId} where /{projectid} represents the column on the report containing the ProjectID column on your report. Remember to remove formatting such as commas. from the ProjectID column or the report returns an error.

Tips

- When a report is designed to run within a workspace (using **#currentworkspace** as a hardcoded filter in the report against a ProjectID column), you can pass the projectid of the workspace you are on using the querystring parameter projectid. For example:
  - **In the report:**

  - **In the link configuration:** /BusinessIntelligence/ReportViewer.aspx?rn=workspacetest&projectid={fkProjectID}
  - **If the link is configured to run from the Workspace Landing Page:** /BusinessIntelligence/ReportViewer.aspx?rn=workspacetest&projectid={ProjectID}

- When a report is designed to filter records for only the current user (using **#currentuser** as a hardcoded filter in the report against a UserID column), the system automatically passes the current user ID into this filter. For the example report above
  - **In the report:**

  - **In the link configuration**: /BusinessIntelligence/ReportViewer.aspx?rn=workspacetest

To add custom links to dataform File fields:

If a dataform in your report contains a file upload field, you can create a link to download the file using the following format:

- **/next/Files/Download?id={ID}**
- **{ID}** is the file upload field in your report (containing the file GUID), and is dynamically replaced in your Url by Izenda. Keep in mind that **Visual Group fields on reports do not count** when figuring out the order.

PEO TableCodes

The following is a list of standard **PEO** dataform tables and the associated TableCodes. If you don't find what you are looking for on this list or would like to add a TableCode for a custom table, log an Extranet case.

Dataform Table	TableCode
gen_AcctManagerVisit	AcctManagerVisit
gen_AdminCaseCategory	AdminCaseCategory
gen_AdminCaseTypes	AdminCaseTypes
gen_AdminCompCodeMaster	AdminCompCodeMaster
gen_AdminHoliday	AdminHoliday
gen_AdminLegalEntity	AdminLegalEntity
gen_AdminLossRunImport	AdminLossRunImport
gen_AdminLossRunImportMapping	AdminLossRunImportMapping
gen_AdminLossRunImportMappingLookup	AdminLossRunImportMappingLookup
gen_AdminPolicyCompCodes	AdminPolicyCompCodes
gen_AdminServiceTeam	AdminServiceTeam
gen_AdminStateLegalEntity	AdminStateLegalEntity
gen_AdminStateRates	AdminStateRates
gen_AdminWorkersCompPolicy	AdminWorkersCompPolicy
gen_AnnualAdministration	AnnualAdministration
gen_ApprovalDependency	ApprovalDependency
gen_Attorney	Attorney
gen_BenefitPlan	BenefitPlan
gen_BenefitPlanTier	BenefitPlanTier
gen_Benefits	Benefits

Dataform Table	TableCode
gen_BenefitsBenefitPlan	BenefitsBenefitPlan
gen_BenefitsPlanCategoryMetadata	BenefitsPlanCategoryMetadata
gen_BenefitsPlanGroup	BenefitsPlanGroup
gen_BenefitsPricing	BenefitsPricing
gen_BenefitsReconAdmin	BenefitsReconAdmin
gen_BenefitTierDefinition	BenefitTierDefinition
gen_BodyPartMetadata	BodyPartMetadata
gen_CauseofInjuryMetadata	CauseofInjuryMetadata
gen_CensusEmployeeImport	CensusEmployeeImport
gen_CertificateOfInsurance	CertificateOfInsurance
gen_ClaimDeductibleBill	ClaimDeductibleBill
gen_ClaimNotes	ClaimNotes
gen_ClaimTypeMetadata	ClaimTypeMetadata
gen_ClientActivity	ClientActivity
gen_ClientCertificates	ClientCertificates
gen_ClientDistressCall	ClientDistressCall
gen_ClientLocation	ClientLocation
gen_ClientMaster	ClientMaster
gen_ClientMasterStatusMetadata	ClientMasterStatusMetadata
gen_ClientProcessingTeam	ClientProcessingTeam
gen_ClientSatisfactionLevelMetadata	ClientSatisfactionLevelMetadata
gen_ClientServiceCase	ClientServiceCase
gen_ClientServiceCaseDiscussion	ClientServiceCaseDiscussion
gen_ClientServiceCaseEscalation	ClientServiceCaseEscalation

Dataform Table	TableCode
gen_ClientServiceCaseExpenses	ClientServiceCaseExpenses
gen_ClientServiceCasePriorityMetadata	ClientServiceCasePriorityMetadata
gen_ClientServiceCaseTime	ClientServiceCaseTime
gen_ClientStatistics	ClientStatistics
gen_ClientTeamRole	ClientTeamRole
gen_ClientTeamRoleMetadata	ClientTeamRoleMetadata
gen_ClientVisitTypeMetadata	ClientVisitTypeMetadata
gen_COBRA	COBRA
gen_COICertificateHolder	COICertificateHolder
gen_COIVersionMetadata	COIVersionMetadata
gen_Collateral	Collateral
gen_CommissionDetail	CommissionDetail
gen_Company401k	Company401k
gen_CompanyInformation	CompanyInformation
gen_CompClaim	CompClaim
gen_CompClaimClaimant	CompClaimClaimant
gen_CompClaimFinancial	CompClaimFinancial
gen_CompClaimInjury	CompClaimInjury
gen_CompClaimLegal	CompClaimLegal
gen_CompClaimPayment	CompClaimPayment
gen_CompClaimPredictiveScore	CompClaimPredictiveScore
gen_CompClaimReserve	CompClaimReserve
gen_CompClaimRTW	CompClaimRTW
gen_CompClaimRTWStatusMeta	CompClaimRTWStatusMeta

Dataform Table	TableCode
gen_CompClaimSubrogation	CompClaimSubrogation
gen_CompClaimTreatment	CompClaimTreatment
gen_CompClaimWitness	CompClaimWitness
gen_CompCodeTranslation	CompCodeTranslation
gen_CompCodeTranslationLink	CompCodeTranslationLink
gen_Contact	Contact
gen_ContactOtherInfo	ContactOtherInfo
gen_ContactTypeOtherInfoMetadata	ContactTypeOtherInfoMetadata
gen_ContractTypeMetadata	ContractTypeMetadata
gen_Correspondence	Correspondence
gen_CPEhrRAF	CPEhrRAF
gen_DeductionVoucher	DeductionVoucher
gen_DefaultAdminFee	DefaultAdminFee
gen_DefaultClientTeam	DefaultClientTeam
gen_DefaultCompDiscount	DefaultCompDiscount
gen_Dependent	Dependent
gen_DiscountThreshold	DiscountThreshold
gen_DiscussionMessage	DiscussionMessage
gen_DiscussionRecipient	DiscussionRecipient
gen_DiscussionThread	DiscussionThread
gen_Employee401k	Employee401k
gen_EmployeeBenefits	EmployeeBenefits
gen_EmployeeCertifications	EmployeeCertifications
gen_EmployeeDeductionVoucher	EmployeeDeductionVoucher

Dataform Table	TableCode
gen_EmployeeEmploymentInformation	EmployeeEmploymentInformation
gen_Employees	Employees
gen_EmployeeVoucher	EmployeeVoucher
gen_EmploymentStatusMetadata	EmploymentStatusMetadata
gen_EntityQualifications	EntityQualifications
gen_EPLIClaim	EPLIClaim
gen_EPLIClaimFinancial	EPLIClaimFinancial
gen_EPLIClaimLegal	EPLIClaimLegal
gen_EPLIPolicy	EPLIPolicy
gen_ExecTeam	ExecTeam
gen_FMLA	FMLA
gen_FSA	FSA
gen_HSA	HSA
gen_I9	I9
gen_ImportInvoiceRecords	ImportInvoiceRecords
gen_IndustryCodeMapping	IndustryCodeMapping
gen_InterfaceException	InterfaceException
gen_JurisdictionReportFormat	JurisdictionReportFormat
gen_LifeInsurance	LifeInsurance
gen_LossDataFactor	LossDataFactor
gen_LossHistory	LossHistory
gen_MasterBenefitsRecord	MasterBenefitsRecord
gen_MBRMatchingRecord	MBRMatchingRecord
gen_MBRReconcile	MBRReconcile

Dataform Table	TableCode
gen_MedicalProvider	MedicalProvider
gen_NatureofInjuryMetadata	NatureofInjuryMetadata
gen_NewQuestionnaire	NewQuestionnaire
gen_OASISInvoice	OASISInvoice
gen_OfferedBenefitPlanSummary	OfferedBenefitPlanSummary
gen_OfferedPlanClassification	OfferedPlanClassification
gen_OrderAssignment	OrderAssignment
gen_OrganizationSourceMetadata	OrganizationSourceMetadata
gen_OrganizationStatusMetadata	OrganizationStatusMetadata
gen_OrgOtherInfo	OrgOtherInfo
gen_OrgTransferRequest	OrgTransferRequest
gen_OSHACode	OSHACode
gen_PayFrequencyMetadata	PayFrequencyMetadata
gen_Payroll	Payroll
gen_PayrollCycle	PayrollCycle
gen_PayrollInformation	PayrollInformation
gen_PayrollStatistics	PayrollStatistics
gen_PensionPlans	PensionPlans
gen_PensionPlanSupplemental	PensionPlanSupplemental
gen_PolicyCodeMetadata	PolicyCodeMetadata
gen_Positions	Positions
gen_PreSaleBenefitPlan	PreSaleBenefitPlan
gen_PreSaleBenefits	PreSaleBenefits
gen_PricingBatch	PricingBatch

Dataform Table	TableCode
gen_PricingBatchState	PricingBatchState
gen_PricingCompCode	PricingCompCode
gen_ProjectMilestone	ProjectMilestone
gen_Qualifications	Qualifications
gen_RevenueAdjustors	RevenueAdjustors
gen_RFPQuestionnaire	RFPQuestionnaire
gen_RiskProfile	RiskProfile
gen_SalesEntity	SalesEntity
gen_SlavicPlanHub	SlavicPlanHub
gen_StaffingAdministration	StaffingAdministration
gen_StaffingClientMaster	StaffingClientMaster
gen_StateContinuation	StateContinuation
gen_StateMetadata	StateMetadata
gen_Surcharges	Surcharges
gen_SurchargeType	SurchargeType
gen_SurchargeTypeDependency	SurchargeTypeDependency
gen_SurchargeTypeMetadata	SurchargeTypeMetadata
gen_SurchargeTypePriceThresholds	SurchargeTypePriceThresholds
gen_TaxNotices	TaxNotices
gen_Termination	Termination
gen_TPA	TPA
gen_UnderwriterApproval	UnderwriterApproval
gen_UnderwritingDefinition	UnderwritingDefinition
gen_UnemploymentBenefitCharges	UnemploymentBenefitCharges

Dataform Table	TableCode
gen_UnemploymentClaim	UnemploymentClaim
gen_UnemploymentClaimFinancial	UnemploymentClaimFinancial
gen_WCClaimNote	WCClaimNote
gen_WorkOrder	WorkOrder

tblTableMetada

tablename	DetailUrl	TableCode
Projects	~/workspaces/landing/{ID}	Workspace
tblContact	~/contacts/detail/{ID}	Contact

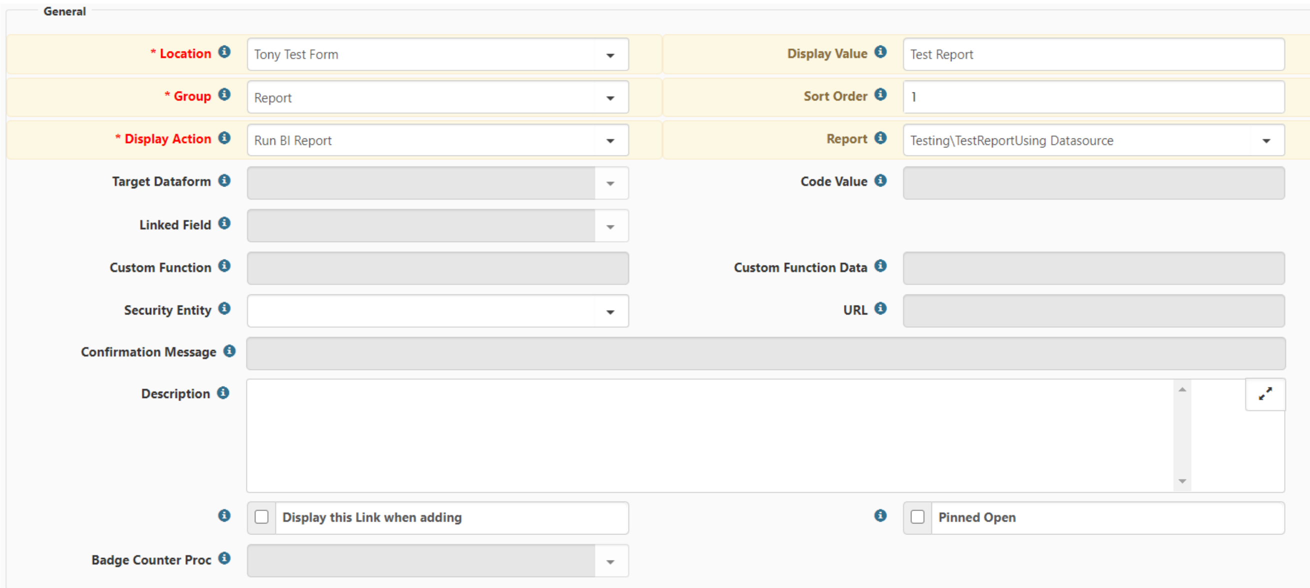
For more information about configuring advanced functionality in ad hoc reporting, log an Extranet case to schedule a training session.

Creating Links for Business Intelligence Reports

BI Report Links can use filtering to display data that is specific to the current user, current record, or current workspace. You must edit the Filtering tab of the BI Report to include #CurrentUser, #CurrentRecord, or #CurrentWorkspace to configure the setup the filtering for the report.

To create links for BI reports:

1. Go to **System Admin** > **Advanced** > **Configure Links**.
   The **Configure Links** dashboard opens.
2. Click **Add**.
   The **Configure Links Detail** form opens.



3. Complete the following fields in the **General** section:
   - Select a dataform or system object in the **Location** field.
   - Enter a value in the **Display Value** field to describe the link that displays in the Action Center.
   - Select **Report** in the **Group** field.
   - Enter a value in the **Sort Order** field to indicate the order in which the report displays in the Reports group of the Action Center.
   - Select **BI Report** in the **Display Action** field.
   - Select a BI report in the **Report** field.
4. Click **Save** to save the link.

Note: Verify that the BI report that you selected in the **Report** field is configured to use #CurrentUser, #CurrentRecord, or #CurrentWorkspace depending on how you want to filter.

CORE View Listing

PrismHR provides a series of Core views in Ad-hoc reporting that are pre-formatted to give you easy access to commonly used data. Descriptions of these views are as follows.

Core views

VIEW NAME	DESCRIPTION
nw_vwAppointments	This view brings back any appointment information across all workspaces. The only condition is with the OrgID & Org Name. It first looks to pull that information from the “Project”, if no project then it is pulled from tblCRMCalendarEvent.
nw_vwAdHocReportsWidgets	This view brings back a listing of all reports currently used on widget layouts. The following fields are included in the view: • Report Name • Widget Layout Active • Widget Layout Name No filter criteria are specified by default. You can set filter criteria, for instance, to only include records where Widget Layout Active = True.
nw_vwOrganization_Activities	This view brings back ALL Appointments, Tasks, and Calls/Emails that exist. No filter criteria specified. • Appointments: Returns all Appointments in system • Tasks: Returns all Tasks in system • Calls/Emails: Returns all Calls and Emails in system
nw_vwImportQueue	This view brings back Import Queue information (PrismHR API Imports) Including file name and import Status.
nw_vwLookups_Field Labels	This view brings back a listing of all lookup datatype fields in the application and their associated Lookup Group.
nw_vwLookups	This view brings back the Group Name, Code, & Decode for ALL Lookups.
nw_vwOrganization_Activities	This view brings back all organization activities and related OrgID and ProjectID
nw_vwTimeTracker_By_User	This view brings back Time tracker data
nw_vwUploaded_Files_GUIDS_To_Varchar	This view brings back Uploaded file data

VIEW NAME	DESCRIPTION
nw_vwUser	This view brings back User data and related departmental data
nw_vwWorkspaceTemplates	This view brings back all Template Workspaces (Active or Inactive) along with their Group Name and Template Name. Can be used to filter results to certain template workspaces.

PEO View Listing

ClientSpace provides a series of PEO views in the Reporting Profile that are preformatted to give you easy access to commonly used data. Descriptions of these views are as follows.

View name	Description
peo_vwBenefitsComparison	This view pulls fields from BenefitsBenefitPlan, BenefitPlan, RateGroupDetail, and PreSaleBenefitPlan tables. 1. Benefits Benefit Plan (**OBP**): Presented Benefit Plan Returns all fields on this dataform. 2. Benefit Plan (**BP**) If there is a Benefit Plan, it brings back all the fields on this dataform. 3. Rate Group Detail Brings back all of the fields on this dataform if there is a Rate Group and if the group matches the Rate Group on the Presented Benefit Plan table. 4. PreSale Benefits Plan (**PSBP**) Brings back all the fields on this dataform if one exists and its primary key matches the fk on the Presented Benefit Plan table.

View name	Description
peo_vwBenefitsACACompliance	This view shows a listing of all health benefit plans which are not compliant with ACA guidelines by client for each group (i.e., Benefits Batch) of Offered Benefit Plans (OBPs). Any health plan where the employer is not contributing at least 50% of the lowest cost benefit plan in the Benefits Batch for the EO (Employee Only) coverage level is displayed on the report. Some of the key columns included in the view are: • Client Name (**WS Client Name**) • Benefit Batch ID (**BB PKID**) • Plan Name (**OBP CPC**) • Employer Contribution Dollar Amount for the EO Coverage Level (**OBP ERCont EO$**) • OBP Employee Premium (**OBP EEPrem**) • Employer Contribution Percent of the Lowest Cost Plan (**ContrPCT_LowCostPlan**) • 50% of the Lowest Cost Plan (**50PCT_LowCostPlan**)

View name	Description
peo_vwClaimDetail	This view pulls all fields from Comp Claim, Comp Claim Claimant, Comp Claim Injury, Comp Claim Legal, and all fields from the latest record on the Comp Claim Financial and Comp Claim RTW. 1. Comp Claim (**CC**) Pulls all fields. 2. Comp Claim Claimant (**CCC**) Pulls all fields. 3. Comp Claim Injury (**CCI**) Pulls all fields. 4. Comp Claim Legal **(CCL)** Pulls all fields. 5. Comp Claim Financial (**CCF**) Pulls the financial record with the Current Record option selected. 6. Comp Claim RTW (**RTW**) Pulls the latest Record for the Comp Claim based on the Date Started.
peo_vwClientServiceCase_Active	Brings back the MOST RECENT and ACTIVE case information for a project based on the Date Created. Excludes Org with multiple workspaces.
peo_vwCaseSubscribers	This view contains the following fields: Client Service Case ID (C_kClientServiceCaseID), Subscriber Email (S_Email), Subscriber First and Last Name combined (S_ FirstAndLastName), Subscriber First Name (S_FirstName), Subscriber Last Name (S_LastName), and Project ID (S_ fkProjectID). Use this view to create a filtered report showing only subscribed cases for a specific subscriber (or subscribers).

View name	Description
peo_vwTaskSubscribers	This view contains the following fields: Task/Incident ID (T_fkIncidentID), Subscriber Email (S_Email), Subscriber First and Last Name combined (S_FirstAndLastName), Subscriber First Name (S_FirstName), Subscriber Last Name (S_LastName), and Project ID (S_fkProjectID). Use this view to create a filtered report showing only subscribed tasks for a specific subscriber (or subscribers).
peo_vwCompanyWorkspaces	Brings back the MOST RECENT information for an Organization based on the Date Created. Excludes Org with multiple workspaces.
peo_vwCompanyWorkspaces_All	Brings back ALL the information for an Organization even if it has more than one workspace (ProjectID) associated with it. Includes Org with multiple workspaces. Also includes the PEO ID for use in multi-tenant environments.
peo_vwCompanyWorkspaces_Clients	Brings back the MOST RECENT information for an Organization based on the Date Created and WHERE Org_crCategory=Client. Excludes Org with multiple workspaces.
peo_vwCompanyWorkspaces_Clients_All	Brings back ALL the information for an Organization even if it has more than one workspace (ProjectID) associated with it and WHERE Org_crCategory=Client. Includes Org with multiple workspaces.
peo_vwCompanyWorkspaces_Prospects	Brings back the MOST RECENT information for an Organization based on the Date Created and WHERE Org_crCategory=Prospect. Excludes Org with multiple workspaces.
peo_vwCompanyWorkspaces_Prospects_All	Brings back the ALL information for an Organization even if it has more than one ProjectID associated with it and WHEREOrg_crCategory=Prospect. Includes Org with multiple workspaces.
peo_vwEmployees	Brings back an Employees Info and their Employment Info when Employment is ACTIVE.

View name	Description
peo_vwLOA	Brings back an Employees Information, their most recent Employment record, their most recent LOA information based on Date Created and the status must be Current or Pending. Also brings back their Comp Claim ID # if the claim is ACTIVE and status is OPEN.
peo_vwPricingInfo	Brings back the most recent information from (**peo_vwCompanyWorkspaces**) and all the information associated with that project.
peo_vwPricingInfo_All	Brings back the all information from (**peo_vwCompanyWorkspaces_All**) and all the Pricing Batch, Pricing State, and Pricing Code information associated with that project. Pulls the pricing information from the batch that is marked as the Current Record.
peo_vwMBRCredit	Brings back the Master Benefits Record Credits information used by our Benefits Reconciliation system.
peo_vwMBRDebit	Brings back the Master Benefits Record Debits information used by our Benefits Reconciliation system.