Logiqc Customer Portal

Quick Start Guide

Introduction

Welcome to the Logiqc Customer Portal powered by monday.com. This guide will assist you to navigate around the portal, view and manage the process of your implementation, access resources and communicate with our team.

1. Logging in

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| **Invitation email** | You will receive an email to sign into your customer implementation plan or resource portal.  The email is sent by the monday.com platform, inviting you to log in to your personalised customer portal.  The invitation will look something like the email invitation on the left.  Your login email will be the email account you received the invitation through. |
| **Logging into your portal** | Once you create your user account, which is a username, your email address, and a password, you are ready to log in and start using your portal.  If you ever forget your password, click on the ‘Forgot your password?’ link and monday.com will email you a new link to reset your password. |

1. Let’s take a closer look

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| **Portal menus** | Once you log in to your portal, you will see on the top left hand side of your portal the following menus:   * **Boards** – Your portal is listed here. Clicking on the portal name will display your portal in the main window of the platform.      * **Inbox** – Where all communication within the board resides. No more searching through endless emails. All your communication is contained within the portal. This is the default view when you log in to your portal.      * **My Work** – A view of all your due tasks   (Refer to - **Status,** **Due Dates & Timelines** for more information) |

1. When you select your portal, the portal will be displayed as per the image below.

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**Your Logiqc Customer portal**

1. Users of your portal

Once you have selected your portal to view, you will see additional menu items along the top of your portal window. Underneath the three-dot menu is an item called ‘Board members’. This displays all the users who have been added to your portal.

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**Portal menu items**

There are two types of users:

* Members – These are your Logiqc contacts. Members have administration rights over the board.
* Guests – This is you and your team. The board resides internally at Logiqc on the monday.com platform. Key members within your team have been added to the portal as ‘guests’ to be able to view your project plan and contribute to any of the phases your team will be responsible for completing, as part of your implementation. Only Logiqc can add and remove users. Please let us know if you need to add more users from your organisation. Changes in board guests will be done within 3 working days upon receipt of request from your organisation’s Logiqc Primary Contact

Below is an example of portal membership. On the left are Logiqc team who will be responsible for assiting you with the implementation of your LogiqcQMS platform. On the right will be you and any other team members within your organisation who require access to the portal.

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**Portal users**

1. My Profile

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| **My Profile** | Your profile information is located at the bottom left-hand side of the portal window.  You can update your profile by clicking on the arrow beside your profile name and selecting ‘My Profile’ from the drop down menu.  This is where you can update your details, add a profile picture, update your password, manage notifications and preferences.  The profile drop down menu also contains the ‘Logout’ function. |

1. Groups

Your portal displays all the relevant implementation stages and resources, which are split into groups. This is the work that both you and the Logiqc team will perform to buld and strengthen your QMS.

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**Groups**

1. Pulses

Within each group are rows, known as pulses. A pulse is a single line of work within a group requiring action by a person. These pulses are assigned either to you and your team or assigned to a LOGIQC team member to complete.



**A pulse**

1. Assignees

Each pulse within each group will be assigned to a user to complete.

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**Pulse Assignees**

1. User permissions within your portal

All users can add pulses, groups, comments, change the status, set due dates, and download any content that has been attached to a pulse.

1. Action and Activity columns

Each pulse within your portal will contain an **Activity** and an **Action** column

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| **Activity & Action column** | The **Activity** column will already be populated in your portal by Logiqc, however this can be edited to suit.  The **Action** column will be populated by Logiqc where appropriate, with recommended Actions required and is updated as activities progress. |

To update an Activity or Action status, simply click on the cell and select the appropriate Activity or Action relevant to the description of the pulse.

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**Update or change a status**

1. Status, Due Dates and Timelines

Each pulse has a ‘**Status’** column and a ‘**Date’** column. There is also an additional ‘**Timeline’** column which can be used to monitor work that may take a specific length of time to complete.

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**Status - Date – Timeline columns**

These columns are used to monitor the progress of the implementation. Logiqc will use this information to ensure we meet our agreed deadlines. You can use these columns to set your own deadlines and due dates to monitor your team’s progress.

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| **Change status** | There are 3 ‘Status’ fields   * **In Progress** – Work that has commenced * **Stuck** – Work has halted and is waiting for another activity to be completed before it can continue * **Done** – The work has finished.   To change the status on your assigned pulses, click on the cell and select the appropriate status. |

Using the Timeline

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|  | If you wish to use the timeline feature, click on the left-hand side of the cell on the arrow to set the start date. The calendar will open, and you can select the start and end dates. |
|  | Once your dates have been filled out, your timeline status will look like this  The Timeline feature is an optional extra you can make use of to monitor your progress. |

**PLEASE NOTE:** It is highly recommended you set due dates on all pulses assigned to you. This will enable you to make use of the ‘My Work’ function within your portal as explained previously in ‘**Navigating around your portal’**. Reporting and different **Views** also use Date and Timeline columns.

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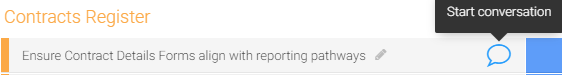
**‘My Work’ view**

1. Accessing resources in a pulse

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| **Documents & Resources and Links** | The Logiqc team will add documents and resources and in some cases hyperlinks to some of the pulses on your portal.  You access these resources by clicking on them. Documents will download to your computer and links will open a second window in your browser, so you don’t lose access to your customer portal page.  You won’t be able to access documents or open links that are in pulses you are not assigned to. Trouble-shooting tip: When you first log in to your portal there may be a delay of up to 1 business day while we assign you to the relevant pulses. |

1. Communicating within the portal

You can add a comment to each pulse by clicking on the balloon icon located in the description field of the pulse. This is how you provide status updates on the progress of the pulse or communicate with your Logiqc contact or other users of the portal.

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**Add a comment**

The portal supports the @mention function, so any user who has been added to the portal can communicate directly with other users of the portal. Below is an example of the @mention function being used to let Hayley know the work on the selected pulse has been completed.

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**Using the @mention function**

Graphical user interface, text, application, email

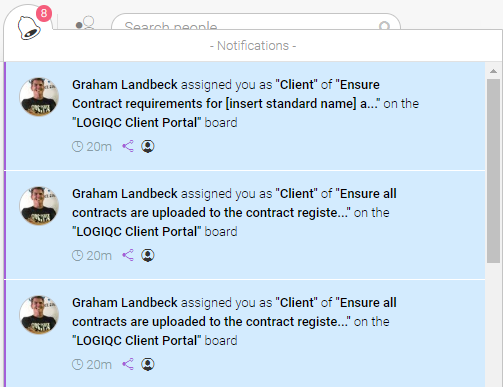
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**Adding a comment to the pulse**

These comments will appear in the ‘Inbox’ for Hayley and Graham as updates. These users will also receive a notification from the portal advising her that this pulse has been updated.

1. Notifications

Anytime there is a change to one of your assigned pulses, you will receive a notification. To view this notification, click on the bell icon, located at the top left of your portal window.

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**Notifications**

1. Using Views and Reporting

There are a number of options to view the information in the portal. These are called ‘Views’ and use the data in your portal. Your Logiqc Success and Engagement team members will assist you in identifying which Views will best suit your needs.



**Types of Views**

You can also export the data from the portal into Excel. Go to the menu in the top right of your portal and select …More actions

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1. Using filters

Your portal contains a lot of information, and a number of filters are available.

If you want to filter on one person’s work here are some filtering options. Filters are located at the top left of your customer portal window.

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**Filtering and sorting options**

Filter by person

* Click on the person icon
* Select the person you wish to filter on and only their work will be displayed.
* Click on the ‘X’ to remove the filtered result.

Filter by anything

* Select the ‘Filter icon
* A series of filter options showing all the groups, pulses, status columns etc will be displayed
* Select the information you want to filter on and the result will be displayed.

Select ‘Clear’ to clear the filtered result.

1. Other Features built into the Customer Portal

Logiqc uses monday.com to power your portal. This guide is not intended to be a monday.com user guide, but rather a guide to assist you navigate around the key features of your Customer Portal that have been specifically customised for you.

There are many other features available within the monday.com platform and we recommend you utilise the monday.com online knowledge base: [monday.com Knowledge Base](https://support.monday.com/hc/en-us)

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