Morningstar Office Academy Day 3: Client Relationship Management

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Overview

Welcome to Day 3 of Morningstar Office Academy. The lessons in this document mirror the lessons demonstrated in the Client Relationship Management Lesson.

The last section of this document lists the practical application exercises designed to help you put into practice key actions demonstrated in this session.

The morning session focuses on notes, tasks and workflows. The following topics are covered:

- understanding the Note Manager, and creating notes
- understanding the Task Manager and creating tasks
- understanding Workflow processes, including: creating a Workflow template, assigning a Workflow to a client, reviewing Workflow tasks in Task Manager, and monitoring a Workflow.

The afternoon session focuses on the Client Web Portal and the Activities center. The following topics are covered:

- enabling the Client Web Portal for clients
- creating Global Client Web Portal settings
- posting reports to the Client Web Portal
- monitoring Client Web Portal usage, and
- reviewing key functions of the Activities page.

Lesson 1: Overview to Note Manager, Task Manager and Workflow

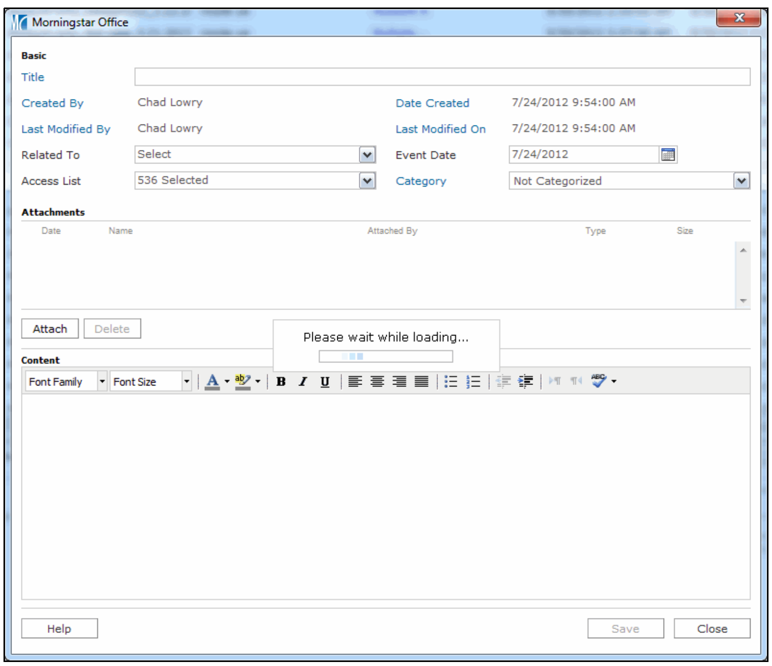
Overview

In this lesson, you will learn about the features of Note Manager, Task Manager, and Workflow.

What should I know about Note Manager?

Note Manager can help you record of all your client correspondences. You can also categorize notes to help organize them, and you can set an access list for your firm, to determine who can see each note.

Notes can be related to clients as well, so they can be accessed from the Home tab, or from a client's record. Notes can include attachments, such as spreadsheets, PDFs or other items.

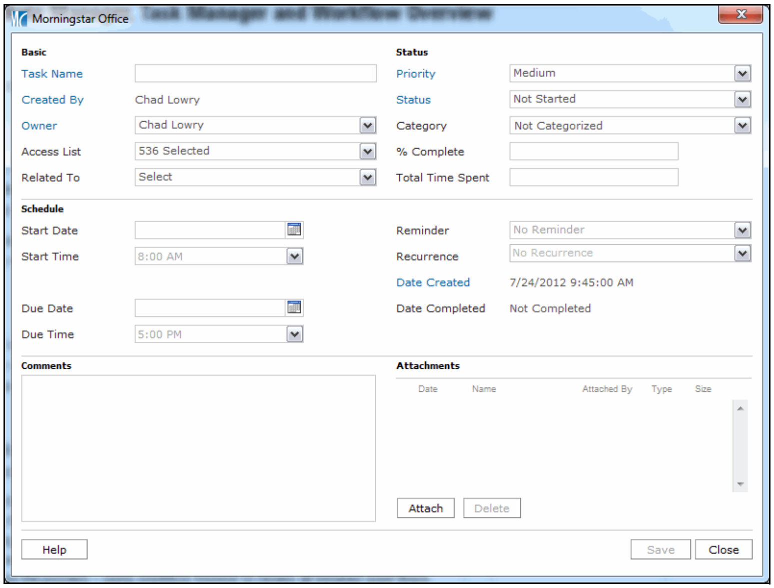


This is the Note Manager dialog box

What should I know about Task Manager?

Task Manager is used to assign tasks to any member of your firm. Tasks can then be related to your clients. A task might be a phone call, sending a birthday or anniversary card, sending a report or setting a reminder to request certain information.

Tasks can also be categorized, and they can be prioritized. Users can indicate when a task is complete, or what percentage of the task has been completed. Reminders can be set, and attachments can be used here as well.

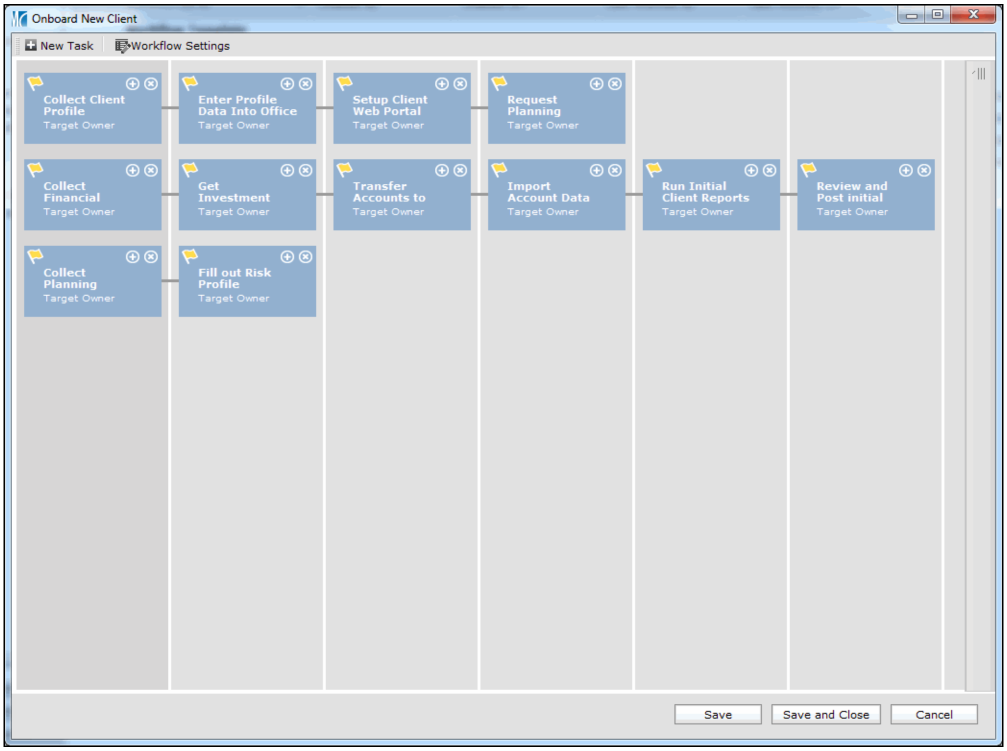


This is the Task Manager dialog box

What should I know about Workflows?

You can use Workflow to create a series of tasks that are part of an overall and repeatable process. Steps in the Workflow process include the following:

1. Define the process by creating a workflow template.
2. Initiate the process, and assign the template to a client.
3. Review the process by entering Task Manager to see that all of the tasks have been initiated and signed out to the correct person.
4. Track the process by using Workflow Monitor to review all initiated work flows.



This is what a workflow might look ike

Lesson 2: Updating the Default Note Manager Settings

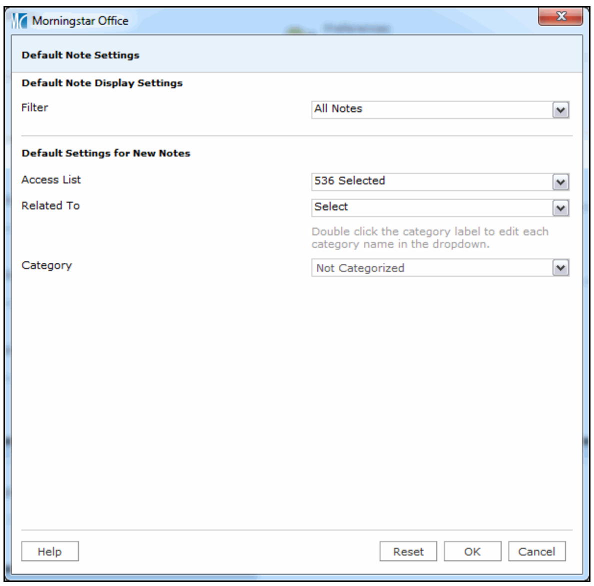
Overview

In this lesson, you will learn about creating Note Manager default settings.

How do I create Note Manager default settings?

Creating default settings for Note Manager will make it faster for you to create notes in the future, as they will save you time from having to enter the same information repeatedly.

You can alter the Note Manager settings from the **Home** tab by going to the **Settings** page. Under the Personal Settings are, select **Note Manager Settings**.



From here, you can set a default Access List, a client each note is related to and a category for each note

Lesson 3: Creating a Note

Overview

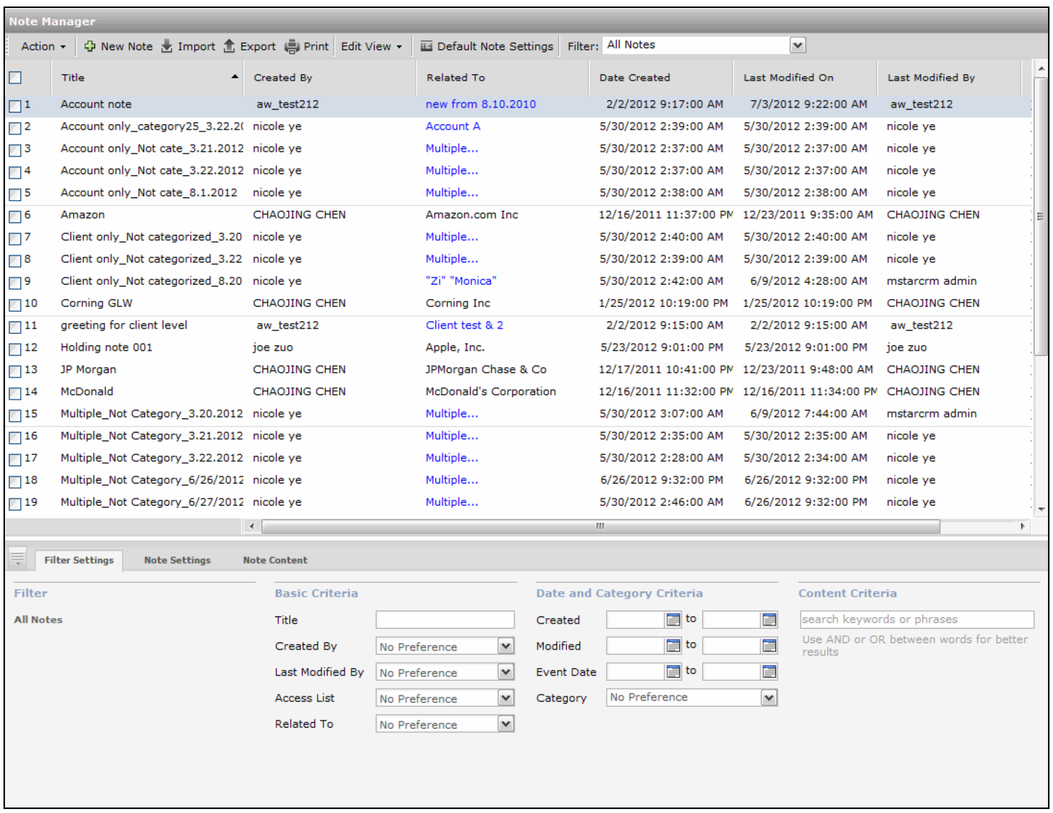
In this lesson, you will learn about the following topics:

- identifying the features of the Note Manager page
- creating a note from Note Manager, and
- creating a note from the Client window.

What are the features of the Note Manager page?

The Note Manager page can be seen from either the Home or Client Management tab. The top half of the Note Manager page includes the following:

- notes you have created, and
- the Note Manager toolbar.



The Note Manager page

The bottom half of the page includes:

- Filter settings, which allow you to filter notes based on a set of criteria.
- Note settings, which allow you to preview a note you have highlighted on the screen.
- Note content, which allows you to quickly add content related to a note that is highlighted on the screen.

How do I create a note from the Note Manager page?

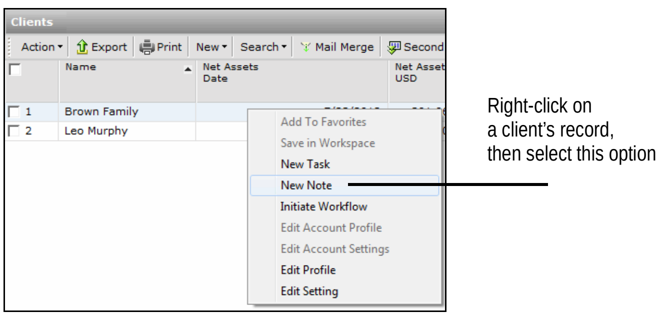
To create a note from the Note Manager page, do the following:

1. Go to either the **Home** tab, or the **Client Management** tab.
2. Select the **Note Manager** page.
3. Click the **New Note** icon above the grid view. The Note dialog box opens.

How do I create a note from a client record?

Creating a note from a client record means the note will automatically be associated with that client.

To create a note from the Client grid view, right-click on a **client record**, and from the right-click menu select **New Note**. The Note dialog box opens, with the client's name automatically populated in the Related To field.



Lesson 4: Creating Task Manager Settings

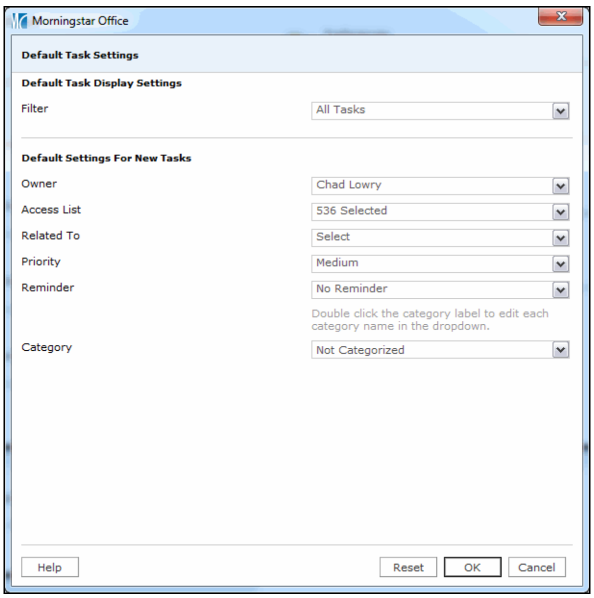
Overview

In this lesson, you will learn about creating Task Manager default settings.

How do I create Task Manager default settings?

Creating default settings for Task Manager will make it faster for you to create tasks in the future, as they will save you time from having to enter the same information repeatedly.

You can alter the Task Manager settings from the **Home** tab by going to the **Settings** page. Under the Personal Settings are, select **Task Manager Settings**.



Choose your default task settings from this dialog box

You can choose default settings for the following items:

- who owns a task
- which Access List can see the task
- which client the task is related to
- the Priority for the task
- whether the task has a Reminder, and of what length, and
- the Category for a task.

☞ Note: You can create or edit a category name from here.

Lesson 5: Creating a Task

Overview

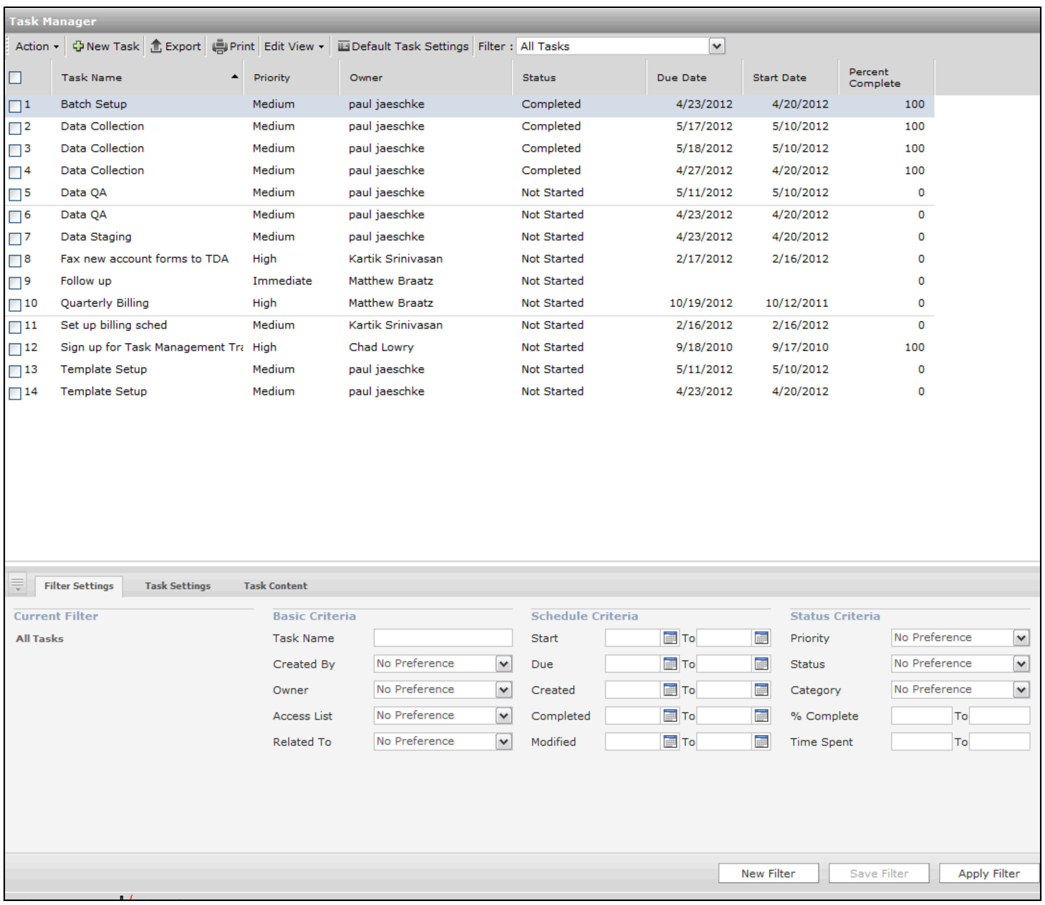
In this lesson, you will learn about the following topics:

- identify features of the Task Manager page
- create a task in Task Manager, and
- create a task from a client's record.

What are the features of the Task Manager page?

The Task Manager page can be seen from either the Home or Client Management tab. The top half of the Task Manager page includes the following:

- the tasks you have created, and
- the Task Manager toolbar.



This is the Task Manager page

The bottom half of the Task Manager page includes the following:

- Filter settings, which allow you to filter your tasks based on a set of criteria
- Task settings, which allow you to preview you the note that you have highlighted on the screen, and
- Task content, which allow you to quickly add content related to a note that is highlighted on a screen.

How do I create a task in Task Manager?

To create a task in the Task Manager, do the following:

1. Go to either the **Home** tab, or the **Client Management** tab.
2. Select the **Task Manager** page.
3. Click the **New Task** icon above the grid view. The Task dialog box opens.

How do I create a task from a client record?

Creating a task from a client record means the task will automatically be associated with that client.

To create a task from the Client grid view, right-click on a **client record**, and from the right-click menu select **New Task**. The Task dialog box opens, with the client’s name automatically populated in the Related To field.

Lesson 6: Shortcuts to Creating a Note or Task

Overview

In this lesson, you will learn about the following topics:

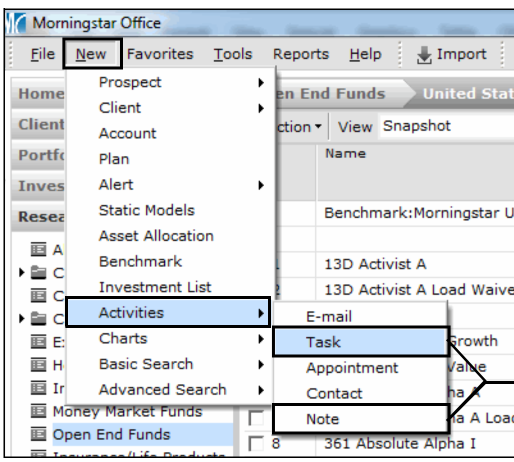
- creating a note from the universal New menu, and
- creating a task from the universal New menu.

How do I create a note or task from the New menu?

You can create a task or note in Morningstar Office, even if you are not in on the Home or Client Management tabs. For example, you might be in the middle of conducting research or putting together an investment plan when you suddenly think of a note you need to make, or a task you need to create. You do not need to leave the Research or Investment Planning tabs to create a note or task.

To create a task or note from the New menu, do the following:

1. From the menu bar at the top of the Morningstar Office window, select **New**…**Activities**.
2. Select either **Notes** or **Task**.



From the New menu,
select Activities,
then either Task or Note

Lesson 7: Understanding and Creating Workflows

Overview

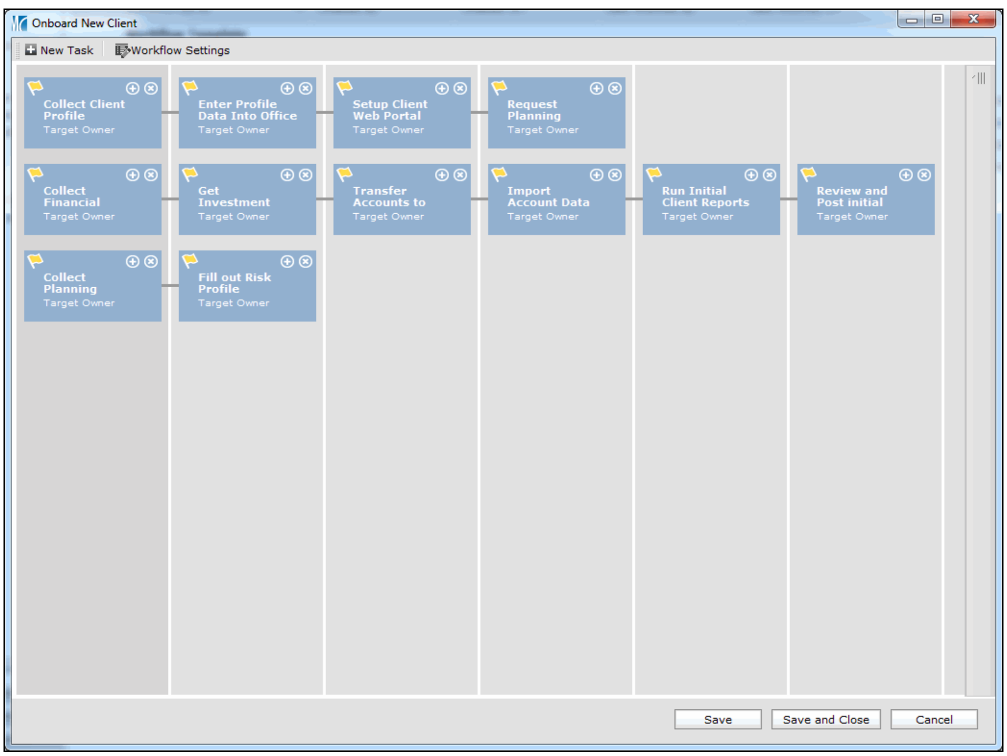
In this lesson, you will learn about the following topics:

- identifying the steps to create a workflow
- creating a workflow template
- initiating a workflow, and
- monitoring a workflow.

What is the process for using the workflow tool?

The workflow feature allows you to create a series of tasks, assigned to multiple firm members that are part of an overall and repeatable process.

1. Define the process by creating a workflow template.
2. Initiate the process, and assign the template to a client.
3. Review the process by entering Task Manager to see that all of the tasks have been initiated and signed out to the correct person.
4. Track the process by using Workflow Monitor to review all initiated work flows.

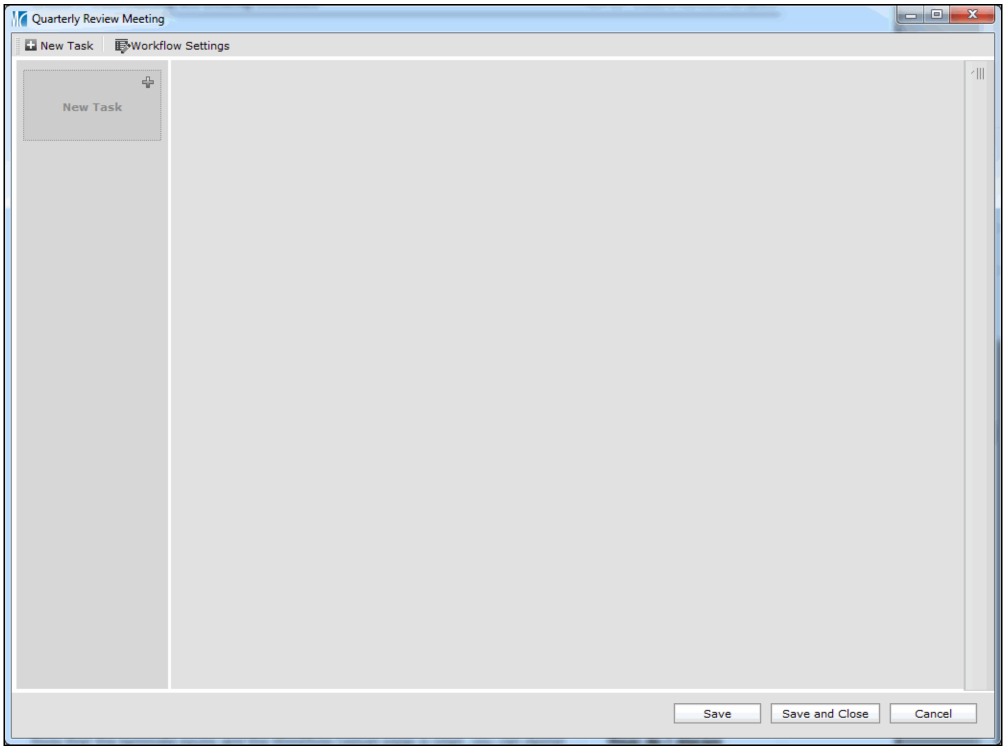


This is what a workflow might look ike

How do I create a workflow template?

To create a workflow, do the following:

1. Go to the **Home** tab.
2. Expand the **Workflow** folder and select **Workflow Templates**.
3. Click the **New Template** icon above the grid view. The Workflow Settings dialog box opens.
4. Enter a **Workflow Name** and assign **Workflow Permission** levels. The Workflow Permission levels determine who will be able to see the workflow.
5. Click **Save**. The Workflow Design page opens.



After saving a template, this window opens

How do I design a workflow?

Now that the template exists and the Workflow Design page is open, you can design the workflow itself, by creating tasks. Do the following:

1. At the top of the Workflow Design page, click the **New Task** icon to create an independent task. A panel appears on the right side of the Workflow Design page.
2. Complete the fields in the **Task Settings** pane.
3. Click the + icon in the upper-left corner of the Workflow Design page to create a dependent task. That is, the task cannot be completed until the one you just created is finished.

☞ Note: To create a new, independent task, click the New Task icon again.

How do I set the task order for a workflow?

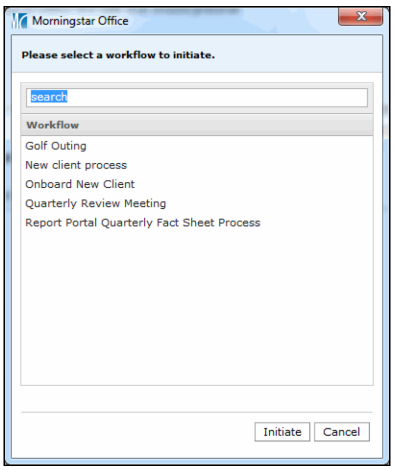
After creating the tasks that are part of the workflow, you might need to reset their order. Do the following from the Workflow Design page:

1. Select the **Task Order** tab.
2. Click once on the **task** you want to move.
3. Use the **Upon Completion** drop-down field to select the task that should precede this one.
4. Click **Apply**.

How do I assign a workflow template to a client?

To assign a workflow template to a client, do the following:

1. Go to the **Client Management** tab.
2. From the Client page, right-click on a **client** then select **Initiate Workflow**. A dialog box opens.
3. Select the **name** of the workflow you want to initiate, then click **Initiate**.



Click once on the name of the workflow you wan to use with the client, then click Initiate

How do I monitor initiated workflows?

The Workflow Monitor page tracks of all your initiated workflows. To see the progress of a workflow, do the following:

1. Go to the **Home** tab.
2. Expand the **Workflow** folder, then select the **Workflow Monitor** page.
3. Click the **View Status** link to launch the Workflow Design page and see which tasks have been completed.

Lesson 8: Enable the Client Web Portal for Clients

Overview

In this lesson, you will learn about setting up the Client Web Portal for your clients.

What is the Client Web Portal?

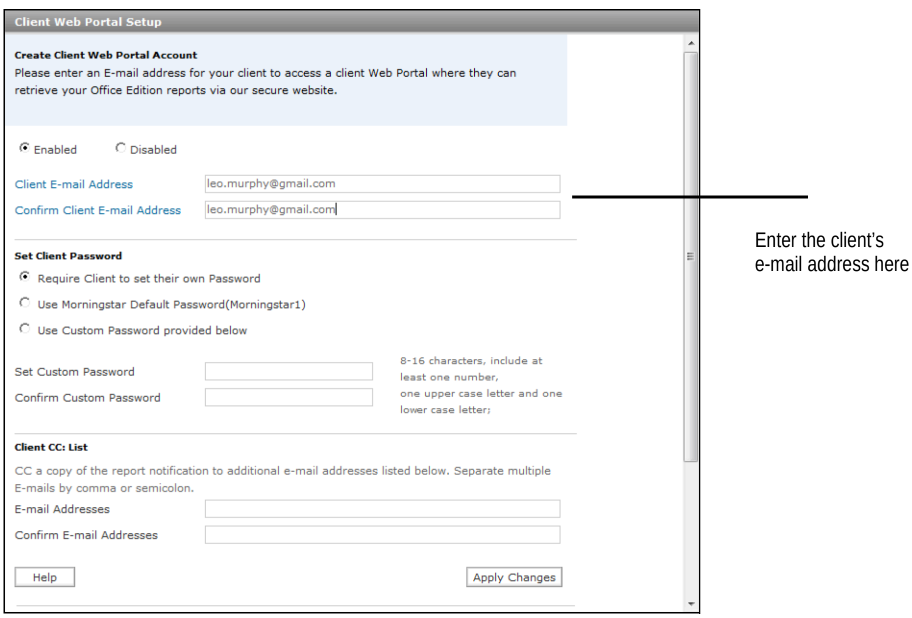
The Client Web Portal is a secure website that each of your clients can access using an e-mail address and a custom password. Clients can view a variety of information about their accounts**.** A Client Web Portal must be set up individually for each client

The two-way communication available via the Client Web Portal allows you to send or post documents to a client site, and allows clients to send or post documents as well.

How do I enable a client's web portal?

To enable the Client Web Portal for a client, do the following:

1. Go to the **Client Management** tab.
2. Go the **Clients** page.
3. Double-click a **client record** to launch the Client window.
4. Go to the **Client Web Portal Setup** page.
5. Select the **Enabled** option button.
6. Enter and confirm the client's **e-mail address**.
7. Click **Apply Changes**.



Lesson 9: Creating Settings to Customize the Client Web Portal

Overview

In this lesson, you will learn about creating settings to customize the configuration and data displayed in the Client Web Portal.

Where do I go to modify the settings for the Client Web Portal?

You can modify the appearance of the Client Web Portal, but the changes are universal; all clients will see the changes you make. To modify the settings, do the following:

1. Go to the **Home** tab
2. Go to the **Settings** page.
3. From the Personal Settings section, click once on **Client Web Portal Settings**. The Client Web Portal Settings window opens. The following sections detail the changes you can make on each tab in this window.

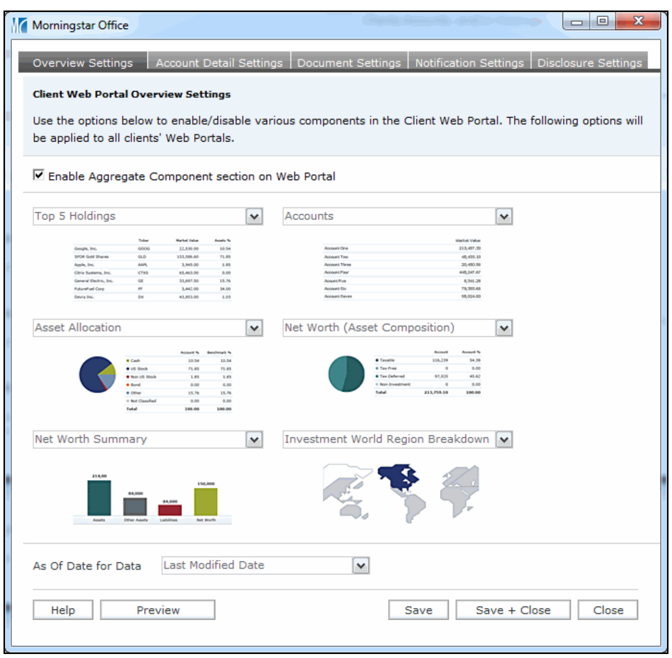
What can I do on the Overview Settings tab?

The Overview Settings tab allows you to include up to six widgets of data on the Client Web Portal. The following information can be included on this tab:

- Top 5 holdings
- Accounts
- Asset Allocation
- Net Worth (by Asset Composition)
- New Worth Summary, and
- Investment World Region Breakdown.

Note the following important points about including this data:

- Check the **box** for Enable Aggregate Component section on Web Portal to show these elements.
- Use the drop-down fields to include, exclude or rearrange screen elements.
- Select an **As of Date for Data** to be used.



To see what this information would look like, click Preview

To keep the changes you've made, click Save

What can I do on the Account Details tab?

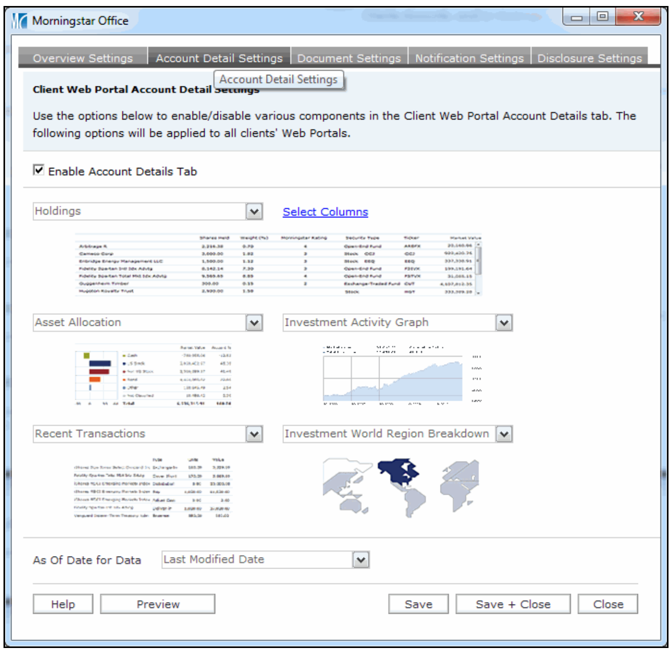
Similar to the Overview Settings tab, you must check the **box** here to Enable Account Details Tab in the Client Web Portal.

The following information can be included on this tab:

- Holdings. Here, you can share data about the client's holdings. You can select the data points to appear in this widget, but keep in mind that the more data points you include, the more scrolling that will be involved for the client.
- Asset Allocation
- Investment Activity Graph
- Recent Transactions
- Investment World Region Breakdown.

Note the following important points about including this data:

- Use the drop-down fields to include, exclude or rearrange screen elements.
- Select an **As of Date for Data** to be used.



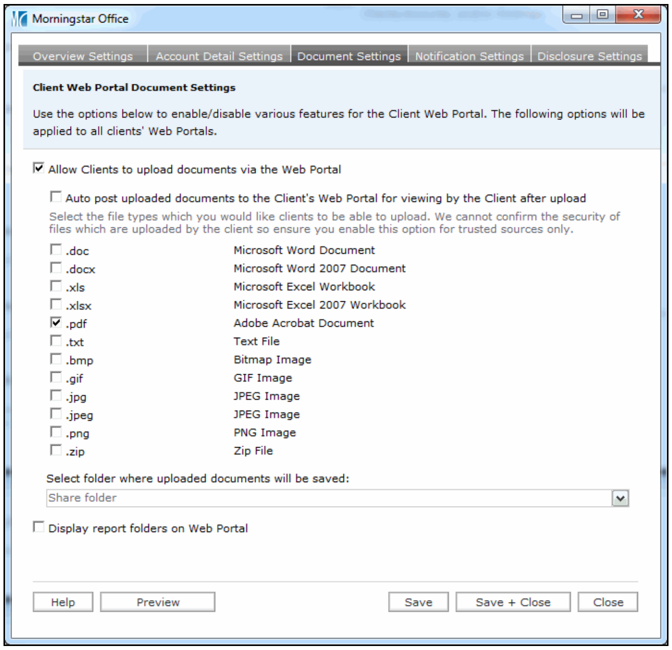
To see what this information would look like, click **Preview**

To keep the changes you've made, click **Save**

What can I do on the Document Settings tab?

Note the following important points about using this tab:

- You can check the **box** to Allow Clients to upload documents via the Web Portal.
- You can choose whether you would like the documents to Auto-post to the Web Portal. If you leave this latter box unchecked, you will need to manually post client-submitted files to the respective Client Web Portal.
- You can select what types of files a client can upload by checking the box next to a file type.
- You also need to select a **folder** under the Reports where uploaded documents will be saved.
- Be sure to click **Save**.



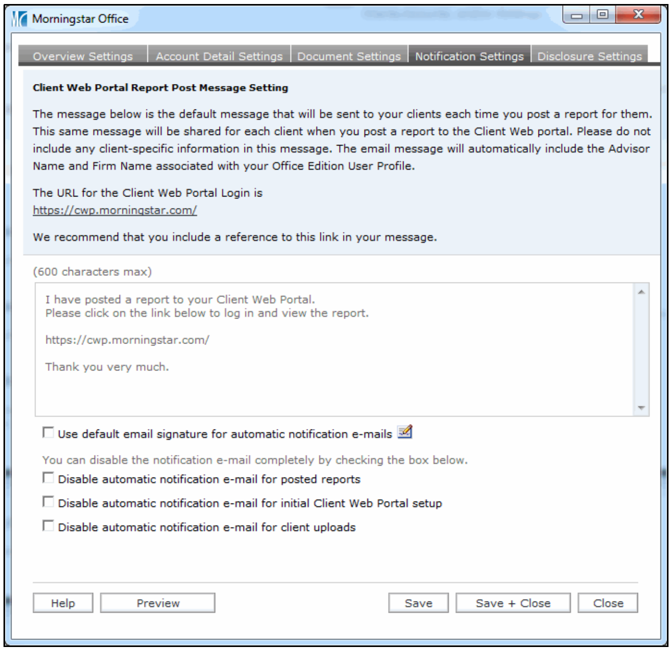
Check the box next to each file type you wan to allow clients to upload

What can I do on the Notifications Settings tab?

The Notification Settings tab allows you set a default message to be sent to clients whenever you post documents to their Client Web Portal.

Note the following other elements you can elect to include with this message:

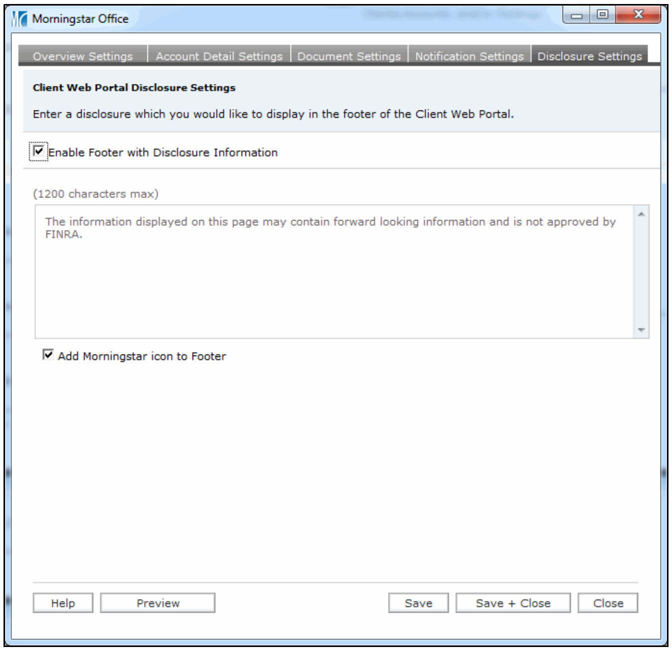
- Click the edit **icon** to the right of Use default email signature for automatic notification e-mails to customize your signature line.
- You can disable this automated notification for reports, the initial Client Web Portal setup, and whenever a client uploads a file
- Be sure to click **Save**.



Type directly in this field
to change the default message

What can I do on the Disclosure Settings tab?

The Disclosure Settings tab allows you to both enable a footer disclosure on the Client Web Portal, as well as tailor the message itself. You can also decide whether to include the Morningstar logo in the disclosure footer.



Type directly in this field to change the disclosure message

When you are done, click **Save+ Close**.

Lesson 10: Posting Documents the Client Web Portal

Overview

In this lesson, you will learn about posting both reports from Morningstar Office, as well as external documents, to the Client Web Portal.

How do I post reports to a client's web portal?

To post reports to an individual client's Web Portal, do the following:

1. Go to the **Reports** tab.
2. Select the **report** to post.
3. Click the **Actions** menu.
4. Select **Post to Web Portal**.

How do I post external documents to a client's Web Portal?

To post external documents directly to your clients web portal, do the following:

1. From the menu bar at the top of the window, select **Tools**…**Batch Document Upload.**
2. In the new window, click on **Add Files**.
3. Navigate to where your file is stored and click **Open**.
4. In the Client drop-down menu, choose a **client** (or **Select All** for your entire firm).
5. From the Account drop-down menu, select an **account**, if necessary.
6. In the Folder drop-down menu, select a **folder** from the Reports tab to house the document.
7. If desired, add a **Description**.
8. To post directly to the Client Web Portal, click **Upload and Post**.

Lesson 11: Viewing the Client Web Portal

Overview

In this lesson, you will learn about the following topics:

- viewing the Client Web Portal, and
- monitoring Client Web Portal Usage.

How do I view a client's web portal?

To view a Client's Web Portal, do the following:

1. From the menu bar at the top of the Morningstar Office window, select **Tools**…**Launch Web Portal**.The Client Web Portal opens.
2. **Log in** to the Client Web Portal.
3. Use the **drop-down field** to select the client whose web portal you want to see.

How do I monitor Client Web Portal usage?

To generate the Client Web Portal Usage Report, do the following:

1. Go to the **Reports** tab.
2. Select the **Usage Reports** page
3. Double-click the **Client Web Portal Usage** item.
4. Select the **Start Date** and **End Date**.
5. Click **Refresh.**

Practical Application Exercises

Overview

These exercises put into practice topics learned during Search Session. Please take the time to complete each exercise.

Exercise 1: Create Note Manager Settings

1. Go to the **Home** tab.
2. Select the **Settings** page.
3. Under the Personal Settings area, click **Note Manager Settings**.
4. From the Filter drop-down field, select **Created Notes**.
5. For the Access List field, click the box for **Select All**.
6. For the Related To field, click the box for **Select All**.
7. Select the **Category** drop-down field.
8. Double-click on an unnamed **category**.
9. Rename the category **Client Call**.

Exercise 2: Create a note from the Note Manager page

1. Go to the **Client Management** tab.
2. Select the **Note Manager** page.
3. Click the **New Note** icon.
4. In the Title field, type **Performance Report Request**.
5. In the Related to field, select the name of a **client**.
6. In the Event Date field, select **7/6/2012**.
7. From the Access List, click **Select All**.
8. From the Category field, select **Phone Call**.
9. In the Comments field, type **Client requested Monthly Performance Reports – delivered by Web Portal on 07/09**.
10. Click **Save + Close**.

Exercise 3: Create a Note from Client Management

1. Go to the **Client Management** tab.
2. Select the **Clients** page.
3. **Right-click** on a client and select **New Note**.
4. In the Title field, type **Client interested in annuities**.
5. From the Access List, click **Select All**.
6. From the Category field, select **Selling Opportunity**.
7. In the Comments field, type **Client requested information related to Variable Annuities**.
8. Click **Save + Close**.

Exercise 4: Create Task Manager Settings

1. Go to the **Home** tab.
2. Select the **Settings** page.
3. Under the Personal Settings area, select **Task Manager Settings**.
4. Set the Default Filter to **All Tasks**.
5. Set the Task Owner to **your name**.
6. From the Access List, check **Select All**.
7. In the Related To field, check **Select All**.
8. Set the Priority field to **Medium**.
9. Set the Reminder field to **30 minutes**.
10. Select the **Category** drop-down field and **double-click** on an unused color to rename it **Client Meeting**.

Exercise 5: Create a task from the Task Manager page

1. Go to the **Client Management** tab.
2. Select the **Task Manager** page.
3. Click the **New Task** icon.
4. In the Task Name field, type **Schedule Quarterly Meeting**.
5. In the Owner field, select **Office Assistant**.
6. From the Access List, click **Select All**.
7. In the Related To field, click **Select All**; this denotes that the task relates to everyone in your firm.
8. Set the Priority field to **High**.
9. Choose a **Status**.
10. From the Category field, select **Phone Call**.
11. Set the Due Date and Due Time to **tomorrow's date** at **8 a.m.**
12. Set the Reminder field to **30 minutes**.
13. From the Recurrence field, select **Calendar Quarter**.
14. In the Comments field, type: **1. Select meeting room 2. Gather Notes from last Meeting, 3. Run Performance Reports**.
15. Click **Save + Close**.

Exercise 6: Create a task from a client's record

1. Go to the **Client Management** tab.
2. Select the **Clients** page.
3. **Right-click** on a client and select **New Task**.
4. In the Task Name field, type **Call client re:variable annuity information request**.
5. Make sure **your name** appears in the Owner field.
6. From the Access List, click **Select All**.
7. Set the Priority field to **High**.
8. From the Category field, select **Phone Call**.
9. Set the Due Date and Due Time to **tomorrow's date** at **8 a.m**.
10. Set the Reminder field to **30 minutes**.
11. Click **Save + Close**.

Exercise 7: Create a workflow

1. Go to the **Client Management** tab.
2. Expand the **Workflow** folder and select **Workflow Template**.
3. Click the **New Workflow** icon.
4. In the Workflow Name field, type **Quarterly Review Process**.
5. From the **Workflow Permission** field, select Full Control for the ability to alter a workflow or initiate a workflow; select **Initiate** for the ability to simply initiate a workflow.
6. Click **Save**. The Workflow Design page opens.
7. Click on the **New Task** icon, and enter the following information in the fields on the right side of the screen:
   - In the Task Name field, type **Contact Client to Schedule a Meeting**
   - In the Choose Owner field, select **Office Assistant**
   - In the Choose Duration of the task field, select **1 day**
   - Set the Priority of the task to **High**
   - Select a color-coded **Category**
   - Set the Reminder to **1 hour**
   - In the Comment field, type **Call Client**
8. Click Save.
9. On the left side of the Workflow Design page, you will see a box at the top for the task you just created. Click the **+ icon** on the upper-right corner of this task to create a dependent task.
10. Enter the following information in the fields on the right side of the screen:

    ☞ Note: This automatically generates a second box next to the first box. Notice the grey line that connects the two boxes. This means that you must complete task 1 before you start task 2.

    - In the Task Name field, type **Determine Location**
    - In the Choose Owner field, select **Office Assistant**
    - In the Choose Duration of the task field, select **1 day**
    - Set the Priority of the task to **Medium**
    - Select a color-coded **Category**
    - Set the Reminder to **1 hour**
    - In the Comment field, type **In Office or Phone Call**
11. Click **Save**.
12. Click the **New Task** icon at the top of the Workflow Design page.

    ☞ Note: The new task falls directly underneath the first task.

13. Enter the following information in the fields on the right side of the screen:
    - In the Task Name field, type **Run Performance Reports**
    - In the Choose Owner field, select **Advisor 1**
    - In the Choose Duration of the task field, select **2 days**
    - Set the Priority of the task to **High**
    - Select a color-coded **Category**
    - Set the Reminder to **1 hour**
    - In the Comment field, type **This should be an aggregate of all assets**
14. Click **Task Order** tab in the top-right corner.
15. Click **Run Performance Reports**.
16. Click **Upon Completion of**.
17. Use the drop-down menu to select **Contact Client to Schedule a Meeting**.
18. Select the **Workflow Start** option button.
19. Click **Apply**.
20. Click **Save and Close**.

Exercise 8: Initiate a workflow

1. Go to the **Client Management** tab.
2. Select the **Clients** page.
3. **Right-click** on a client and select **Initiate Workflow**.
4. Select a **workflow** (e.g., Quarterly Review Process).
5. Click **Initiate**.

Exercise 9: Review a task in Task Manager

1. Go to the **Client Management** tab.
2. Select the **Task Manger** page.
3. Double-click a **task** (e.g., Contact Client to Schedule a Meeting).
4. Change the Status field from Not Started to **Complete**.
5. Click **Save**.

Exercise 10: Using the Workflow Monitor

1. Go to the **Client Management** tab.
2. Expand the **Workflow** folder and select the **Workflow Monitor** page.
3. Click on the **workflow name** (e.g., Quarterly Review Process). Here you can monitor the workflow's progress.

Exercise 11: Enable the Client Web Portal for clients

1. Go to the **Client Management** tab.
2. Select the **Clients** page.
3. Double-click a **client record**. The Client window opens.
4. Select the **Web Portal Setup** page.
5. Click **Enable**.
6. Enter and confirm the client's **e-mail address**.
7. Click **Save**.

Exercise 12: Create settings to customize the Client Web Portal

1. Go to the **Home** tab.
2. Select the **Settings** page.
3. Under the Personal Settings are, click on **Client Web Portal Settings**.
4. In the Overview Settings tab, do the following:
   - select **Enable Aggregate Component section on Web Portal**
   - rearrange the components with the drop-down menus, if you desire
   - choose an **As Of Date for Data** at the bottom of the window, and
   - click **Save**.
5. Click the **Account Detail Settings** tab, and do the following:
   - select **Enable Account Details Tab**
   - rearrange the components with the drop-down menus, if you desire
   - choose an **As Of Date for Data** at the bottom of the window, and
   - click **Save**.
6. Click the **Document Settings** tab, and do the following:
   - select **Allow Clients to upload documents via the Web Portal**
   - select to **Auto post uploaded documents**, if you desire
   - select the following file types: **.doc**, **.xls**, and **.pdf**
   - select **Display report folders on Web Portal**, and
   - click **Save**.
7. Click the **Notifications Settings** tab, and do the following:
   - next to the Use default email signature for automatic notification e-mails, click the **edit icon** and customize your signature line, and
   - click **Save**.
8. Click the Disclosure Settings tab, and do the following:

- select **Enable Footer with Disclosure Information**
- add your **disclosure** in the blank field
- click **Save+ Close**.

Exercise 13: Post a document to a client's Web Portal

In preparation, please have a document or report saved in the Reports tab to complete this exercise.

☞ Note: As this is a practice exercise, it is not necessary to actually post a document at this time.

1. Go to the **Reports** tab.
2. Select the **report** to post.
3. Click the **Actions** menu.
4. The next step is to click Post to Web Portal; it is not necessary to do this now, unless this is a report or document you would like to post to your Client Web Portal.

Exercise 14: Post external documents directly to your clients' web portal

In preparation, please have a document saved to your hard drive you would like to simulate posting to the Web Portal.

☞ Note: As this is a practice exercise, it is not necessary to actually post a document at this time.

1. From the menu bar at the top of the Morningstar Office window, click **Tools**…**Batch Document Upload**.
2. In the new window, click **Add Files**.
3. Navigate to where your file is stored and click **Open**.
4. In the Client drop-down menu, select your **client**(s) or choose **Select All** for your entire firm.
5. Select an **account**, if necessary, in the Account drop-down menu.
6. In the Folder drop-down menu, select a **folder** from the Reports tab to house the document.
7. If desired, add a **Description**.

☞ It is not necessary to click the Upload and Post button, unless this is a document you would like to actually post to your Client Web Portal.

Exercise 15: View your clients' Web Portal

1. From the menu bar at the top of the Morningstar Office window, click **Tools**…**Launch Web Portal**.
2. **Log in** to the Client Web Portal.
3. Use the **drop-down field** at the top of the new window to toggle between clients

Exercise 16: Generate the Client Web Portal Usage Report

1. Go to the **Reports** tab.
2. Select the **Usage Reports** page.
3. Double-click on the **Client Web Portal Usage** item.
4. Select the **Start Date** and **End Date**.
5. Click **Refresh**.