CityFibre Customer Portal - Portal Control Panel (PCP)

Guidance and usage/triage examples for Service Desk and Service Teams.

Glossary of Terms

	Terminology	Definition
01	**Portal Control Panel (PCP)**	An internal CityFibre tool to support customer and CF queries and manage customer portal onboarding **(Fig.1)** https://production-unifyadministration-unify-administration-portal.enta.cloud/home
02	**Customer Portal (CP)**	The main Portal used by CityFibre customers to view orders, services, incidents, billing information and more: customer.cityfibre.com
03	**CityFibre (CF)**	The business and our staff.
04	**Service Desk (SD)**	CityFibre service desk, owners of customer account creation and initial admin set-up for the CP.
05	**Customer**	An ISP or partner using/reselling CF products.
06	**Customer Account**	Created on the CP to allow users to see orders, services, incidents etc.
07	**User**	Anyone assigned a login to the CP. Some CF employees/account support teams etc., but mainly employees of the customer, they are assigned an individual login to their customer account on the CP.
08	**Role**	A role or set of roles assigned to a user of the CP.
09	**Multi-Org**	A feature that allows users to have access to multiple customer accounts.

General guidance on ownership of user management for the Customer Portal (CP):

1 - **CityFibre (CF) is not responsible** for the CP user management of customer accounts.

2 - Customers should have assigned admin users of the CP. These admin users are responsible for all user management, including:

A - Adding/Inviting A New User   B - Removing An Existing User   C - Setting and Amending the Access Roles for Each User
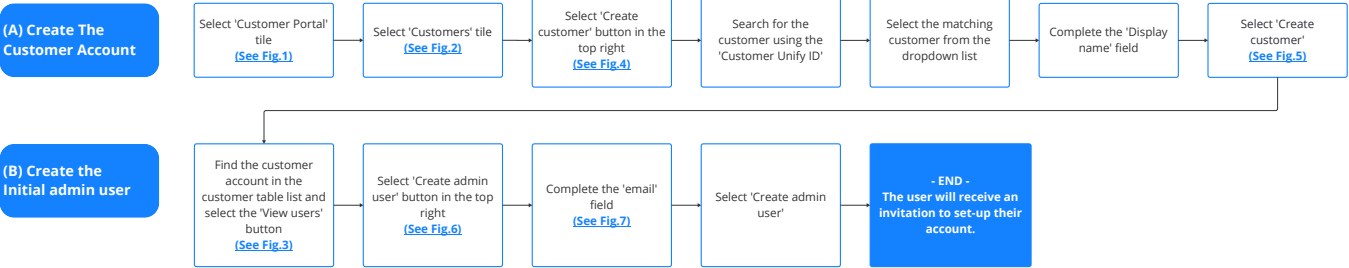
3 - It is recommended that customers assign a minimum of two admin users on the customer account. Admin users are needed to complete user management. If there is only one admin user and they leave, or go on leave from the customer's operations, then the customer cannot self-serve in the admin user's absence.

> **CF is responsible for** creating new customer accounts on the CP and assigning the initial admin user to that customer account.

CityFibre Service Desk can only create admin users. Admin users gain access to all areas of the CP. It is essential that we have confirmation from a senior employee of the customer to request that an admin account is created. This is to protect the security of the customer account.

Examples of actions and triage on the Portal Control Panel (PCP):

Request #1 - Creating a new customer account & the initial customer admin user	
Owner	Service Desk (SD).
Requestor	CF onboarding/accounts/service teams.
Detail	SD receive a request to create a new customer and the initial Admin user on the CP. The request should not be direct from the customer, it would need to be validated and requested by the CF onboarding or accounts/service teams.
The request should contain:	1 - Customer Name 2 - Customer Unify ID (Should exist after the customer has been set up with Accounts/Billing teams) 3 - Initial admin users email address

(A) Create The Customer Account
- Select 'Customer Portal' tile **(See Fig.1)**
- Select 'Customers' tile **(See Fig.2)**
- Select 'Create customer' button in the top right **(See Fig.4)**
- Search for the customer using the 'Customer Unify ID'
- Select the matching customer from the dropdown list
- Complete the 'Display name' field
- Select 'Create customer' **(See Fig.5)**

(B) Create the Initial admin user
- Find the customer account in the customer table list and select the 'View users' button **(See Fig.3)**
- Select 'Create admin user' button in the top right **(See Fig.6)**
- Complete the 'email' field **(See Fig.7)**
- Select 'Create admin user'
- **- END -** The user will receive an invitation to set-up their account.

Request #2 - Create a new user/admin user	
Owner	Customer (SD/CF teams to support if needed)
Requestor	Customer
Detail	CF team members and/or SD receive a request to create a user or an admin user on a CP customer account.
Deflection	The customer admin user can complete this task in the 'user management' area of the CP.

Additional/related FAQs

(Q1) The customer account does not exist.

Answer - See 'Req.1'.

(Q2) The user does not know who their CP admin user is.

Answer - Using the PCP, view the 'Customers' tile, find the customer account in the table list and select 'View users'.
All users and roles are visible here. **(See Fig.3)**

(Q3) There is no admin user, or the designated admin user no longer works for the customer/is away from the business.

Answer - In this case, SD can create/invite a new admin user to the existing customer account (see 'Req.1, a.). If the request has come direct from a customer to SD, then SD needs to deflect the customer back to their CF account/service manager. The account/service manager then needs to validate the request for a new admin user (in writing from a senior employee of the customer), and then submit the request on behalf of the customer to SD.

Request #3 - User cannot access the Customer Portal (CP)	
Owner	Customer (SD/CF teams to support if needed)
Requestor	Customer
Detail	CF team members and/or SD receive a request to help a user get access to the Portal.
Deflection	The customer admin user can support this user with troubleshooting using the 'user management' area in the CP, including: identifying if the user exists, whether the user has ever logged in, when the user last logged in, resetting the user's password, deleting the user, and inviting the user.

Additional/related FAQs

(Q1) The customer account does not exist.

Answer - See 'Req.1'.

(Q2) The user does not know who their CP admin user is.

Answer - Using the PCP, view the 'Customers' tile, find the customer account in the table list and select 'View users'.
All users and roles are visible here. **(See Fig.3)**

(Q3) There is no admin user, **or the designated admin user no longer works for the customer/is away from the business**.

(A) Answer - In this case, SD can complete the same troubleshooting listed in 'deflection' above using the PCP. If that doesn't solve the issue, then a new admin user might be required on the customer account, so that they can support the user and set them up again.

(B) Answer - To create/invite a new admin user to the existing customer account (see 'Req.1, a.). If the request has come directly from a customer to SD, then SD needs to deflect the customer back to their CF account/service manager. The account/service manager then needs to validate the request for a new admin user (in writing from a senior employee of the customer), and then submit the request on behalf of the customer to SD.

Request #4 - No Customer Portal (CP) invitation received	
Owner	Customer (SD/CF teams to support if needed)
Requestor	Customer
Detail	CF team members and/or SD receive a request to help a user who is expecting an invite to gain access to the Portal.
Deflection	The customer admin user can support this user with troubleshooting using the 'user management' area in the CP, including: identifying if the user is listed on the 'Invitations' area, if the user is on the invitations page, then the admin user can access the invitation link from there and share it with the user. If the user is not on the invitations list, then they should check if they are already on the users list and advise accordingly. Finally, if the user is not on the invitation page or the users page, then they will need to be invited again by the customer admin user.

Additional/related FAQs

(Q1) I can't see my invitation email.

(A) Answer - Check spam, or speak to an admin user to provide you with the invitation link
which will get you to your account set-up page.

(B) Answer - Does the user have access to another customer account on the customer portal (CP)? You can ask the user or check the 'Users' tile on the PCP **(See Fig.2)**. If the user has access to multiple accounts, then that user will not receive an invitation for additional customer account access. Instead, once invited, they need to log out and log back in, they will then see a customer account selection page to select the customer account they want to access.

(Q2) The invitation link isn't working.

Answer - Send a new invite. If this still doesn't work then a ticket may need to be raised to service desk.

(Q3) There is no admin user, or the designated admin user no longer works for the customer/is away from the business.

(A) Answer - In this case, SD can complete the same troubleshooting listed in 'deflection' above using the PCP. If that doesn't solve the issue, then a new admin user might be required on the customer account so that they can support the user and set them up again.

(B) Answer - To create/invite a new admin user to the existing customer account (see 'Req.1, a'). If the request has come directly from a customer to SD, then SD needs to deflect the customer back to their CF account/service manager. The account/service manager then needs to validate the request for a new admin user (in writing from a senior employee of the customer), and then submit the request on behalf of the customer to SD.

Request #5 - User needs to change their role in the CP	
Owner	Customer (SD/CF teams to support if needed)
Requestor	Customer
Detail	CF team members and/or SD receive a request to help a user add/remove role(s) from a user in their CP account.
Deflection	The customer admin user can complete this work, refer them to the relevant portal knowledge article (currently - https://customer.cityfibre.com/help-and-support/knowledge/articles/KB0011329).

Additional/related FAQs

(Q1) I can't access a section on the portal.

Answer - Check the user role and refer to the relevant portal knowledge article.

(Q2) Who changed my role?

Answer - We can view change logs for users in the PCP; navigate to 'Home > Customer Portal > User management logs' - use the search bar to find the user and any changes will be shown there. **(See Fig.8)**
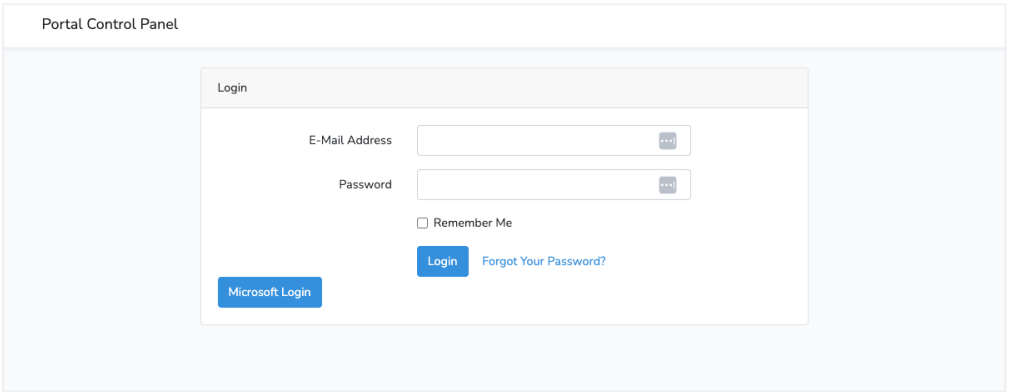
(Q3) There is no admin user, or the designated admin user no longer works for the customer/is away from the business.

(A) Answer - In this case, SD can complete the same troubleshooting listed in 'deflection' above using the PCP. If that doesn't solve the issue, then a new admin user might be required on the customer account so that they can support the user and set them up again.

(B) Answer - To create/invite a new admin user to the existing customer account (see 'Req.1,a'). If the request has come directly from a customer to SD, then SD needs to deflect the customer back to their CF account/service manager. The account/service manager then needs to validate the request for a new admin user (in writing from a senior employee of the customer), and then submit the request on behalf of the customer to SD.
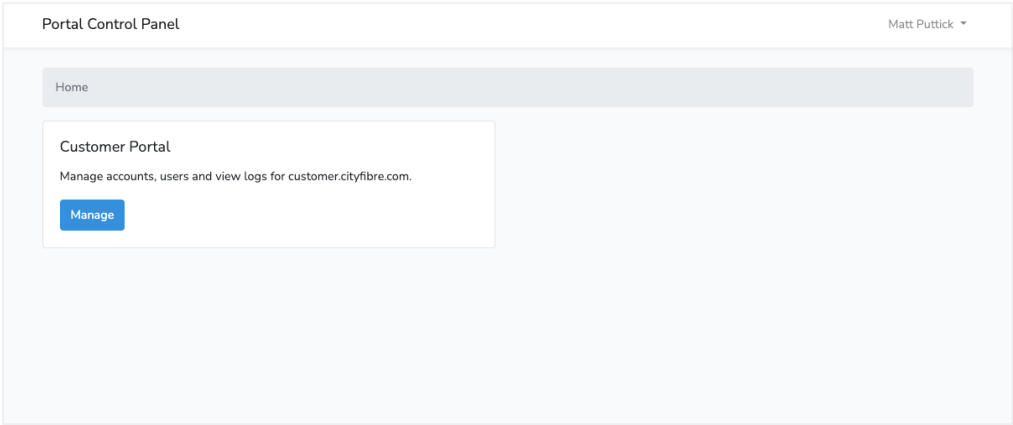
An introduction to the Portal Control Panel (PCP)

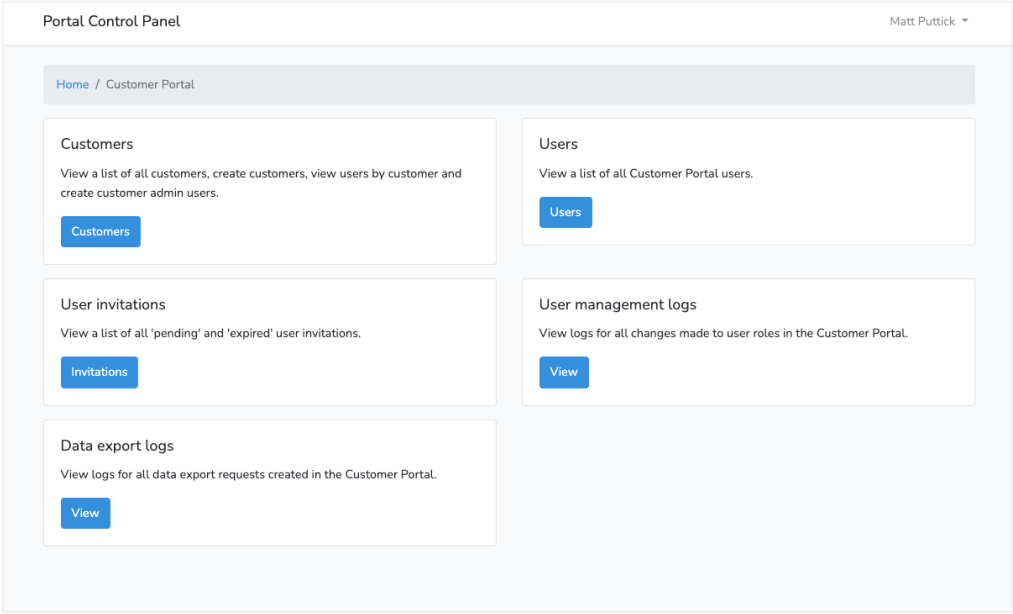A CityFibre internal tool to manage and support users of our CityFibre Customer Portal

Portal Log in

Portal Control Panel

Login

E-Mail Address

Password

☐ Remember Me

Login   Forgot Your Password?

Microsoft Login

Portal Control Panel (Fig.1)

Portal Control Panel   Matt Puttick ▾

Home

Customer Portal

Manage accounts, users and view logs for customer.cityfibre.com.

Manage

Customer Portal (Fig.2)

Portal Control Panel   Matt Puttick ▾

Home / Customer Portal

Customers

View a list of all customers, create customers, view users by customer and create customer admin users.

Customers

Users

View a list of all Customer Portal users.

Users

User invitations

View a list of all 'pending' and 'expired' user invitations.

Invitations

User management logs

View logs for all changes made to user roles in the Customer Portal.

View

Data export logs

View logs for all data export requests created in the Customer Portal.

View

Customer List (Fig.3)

Portal Control Panel							Matt Puttick ▾

Home / Customer Portal / Customers

[Enter display name here] [Search]

Display name	Customer ID	Auth0 name	Auth0 ID	Created by	Created	Updated	Users
Mason Infotech Ltd x1	91	mason-infotech-ltd	org_Lcxk5VtLGrXqzvk7	craig.pedley@cityfibre.com	2024-01-30 10:26:36	2024-08-29 14:51:23	View users
The Bishop of Derby	128	the-bishop-of-derby	org_lAMsvxUNbkAhXvht	craig.pedley@cityfibre.com	2024-01-30 10:36:54	2024-01-30 10:36:54	View users
Daisy Communications Limited	140	daisy-communications-limited	org_R1J2o8D1lMjTfyQU	craig.pedley@cityfibre.com	2024-01-30 11:12:47	2024-01-30 11:12:47	View users
VoiceHost Limited	77	voicehost-limited	org_rLDqNTKqDIAxi6rV	craig.pedley@cityfibre.com	2024-01-30 11:15:07	2024-01-30 11:15:07	View users

Customer List (Create Customer) (Fig.4)

Portal Control Panel							Matt Puttick ▾

Home / Customer Portal / Customers

[Enter display name here] [Search]   [Create customer]

Display name	Customer ID	Auth0 name	Auth0 ID	Created by	Created	Updated	Users
AllPointsFibre (Giganet)	11598	allpointsfibre	org_rQDiDUJqm5L4xafb	unknown			View users
Colt Technology Services	11597	colt	org_t7J4W4H01rXi3NqW	unknown			View users
Giacom	17556	giacom	org_khjDzgJBb4KKfzva	unknown			View users
Neos Networks Limited	11655	neos	org_4Zucg9aKxRkAsN2w	unknown			View users

Create A Customer (Fig.5)

Portal Control Panel	Matt Puttick ▾

Home / Customer Portal / Customers / Create customer

Create customer

Search customer: [_____]

Matching Customers:

[_____ ▾]

Customer ID:

[_____]

Display Name:

[_____]

Name (Derived from Display Name):

[_____]

[Create customer]

Viewing Customer Users

Home / Customer Portal / Customers / CityFibre users

| dd/mm/yyyy 📅 | dd/mm/yyyy 📅 | Email | Search | Clear Search |

Name	Email	Roles	Created	Logins	Latest login	Single Sign-On (SSO)
James Convey	james.convey@cityfibre.com	Admin	2023-10-17 15:11:27	13	2024-09-25 11:34:15	
Test Cityfibre 1	ian.dsouza@cityfibre.com	Admin	2023-07-21 14:03:48	413	2024-09-25 09:04:51	
david.hourn@dawsonandrews.com	david.hourn@dawsonandrews.com	Ordering, Admin, Support, Billing	2024-07-23 12:29:43	49	2024-09-24 08:20:07	
Dave Hourn	david.hourn+test8@dawsonandrews.com	Admin	2024-09-06 10:05:28	3	2024-09-20 14:00:12	

Creating An Admin User (Fig.6)

Home / Customer Portal / Customers / AllPointsFibre (Giganet) users

| dd/mm/yyyy 📅 | dd/mm/yyyy 📅 | Email … | Search | Clear Search | | Create admin user |

Name	Email	Roles	Created	Logins	Latest login	Single Sign-On (SSO)
sammy walford	sammy.walford@cityfibre.com	Admin	2023-08-07 09:49:25	229	2024-09-25 12:54:22	

Create Admin User (Fig.7)

Home / Customer Portal / Customers / AllPointsFibre (Giganet) users / Create admin user

Create admin user

Email:

[…]

Create admin user

User Management Logs (Fig.8)

Home / Customer Portal / User management logs

| Email | Search | Clear Search |

Change type	User changed	Changed by	Previous values	New values
role		george.vinters@cityfibre.com	{"role":"Admin,Ordering,Support,Billing"}	{"role":"Admin,Orde
role	ext_softserveinc_illya_usenko@cityfibre.com	george.vinters@cityfibre.com	{"role":"Admin"}	{"role":"Admin,Deve