Client Self Services Administration

The Client Self Services Portal files are located on the server: *(virtual path here)*

All clients, once set up with a Client ID, may use their Client ID to login to Client Self Services. The default password is "**password**" until the client changes it to one of their choosing.

Setting Up Client Self Service Access

The SDE Administrator performs **Client Self Services Administration.**

Prior to clients logging into the Self Service Portal, the Administrator must:

- **Assign Client Access in the Self Service Settings** *(link in live version)*
- **Assign a Client Navigation Bar** *(link in live version)*

Assigning Client Access in the Self Service Settings

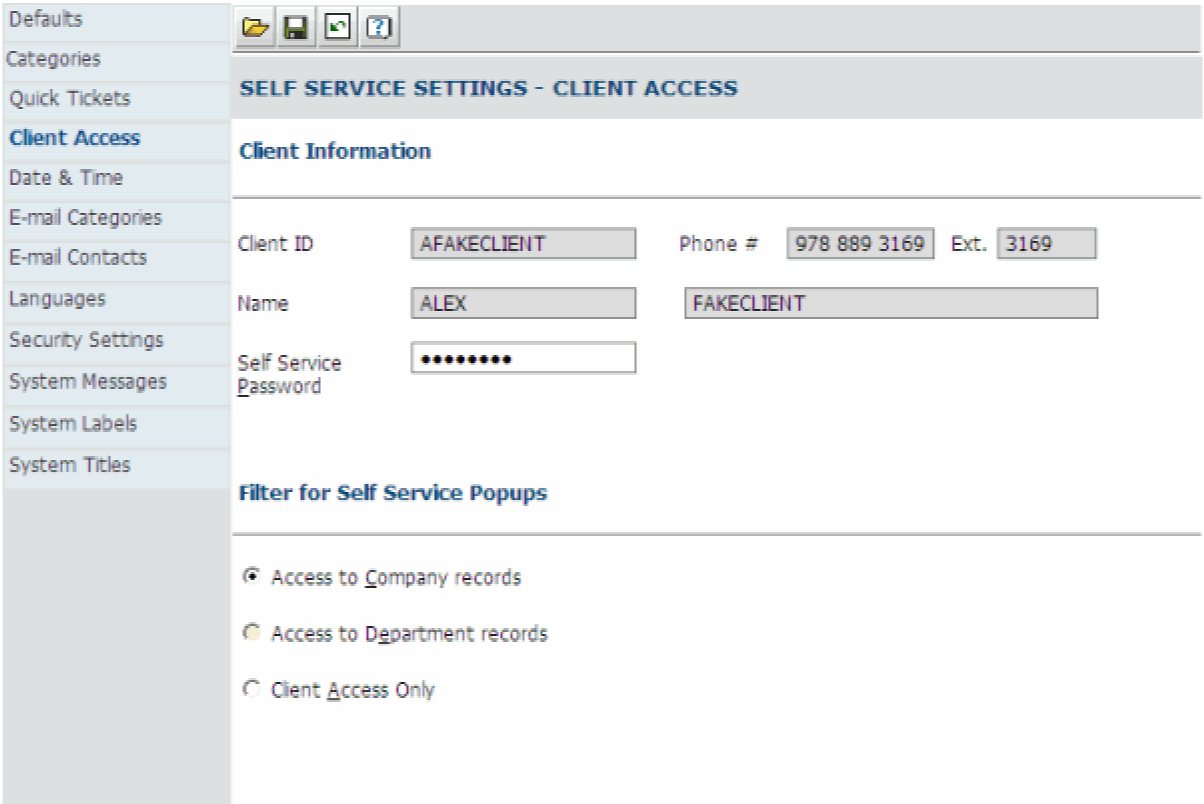
In the SDE Navigator Frame

1. Select **Self Service Settings**.
2. Select **Client Access** from the left navigation pane.

In the Client Access dialog

3. Click the **Find** icon.
4. Search to select the client by last name in the popup window.
5. Double-click the client row and the client info is populated in the Client Access dialog.
6. Enter a password of **password** into the Self Service Password dialog box. (If this password box is already populated, this indicates that a password has already been assigned to this Client ID.)
7. Select from the radio buttons what level of access the client should have—***Company, Department, or Client only***.
8. Click the **Save** icon to save the client settings.

Client Access Dialog



Assigning a Client Navigation Bar

In the SDE Navigator Frame

1. Select the **Self Service Administration** section.
2. Select the **Self Service Customization Wizard** link.
3. Click the **Navigation** checkbox.
4. Click **Assign Navigation** to access the dialog.
5. Click the dropdown by **Client**.
6. Search to select the client by last name.
7. Double-click the client row to enter it in the client dialog box.
8. Click the dropdown top right to select the **Navigation**.
9. Select **SC Self Service 1** Navigation.
10. Click the **Assign** button.
11. Click **Finish** at the bottom of the dialog.

Assigning Client Navigation