

Self-Service Client Portal

User's Guide



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Portal Overview

This document will demonstrate how to use the Salesforce Client Portal. The Salesforce Client Portal allows Morningstar Commodity Data customers to view, and update the inquiries they have reported to Morningstar Commodity Data. The Portal also enables Morningstar Commodity Data customers to report new issues to Morningstar Commodity Data.

Logging In to the Portal

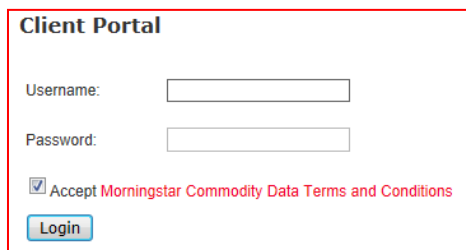
To log in to the Self-Service portal:

- Open the Self-Service portal in your browser. The URL is:
www.morningstarcommodity.com/support

- Enter your username and password as provided via email.

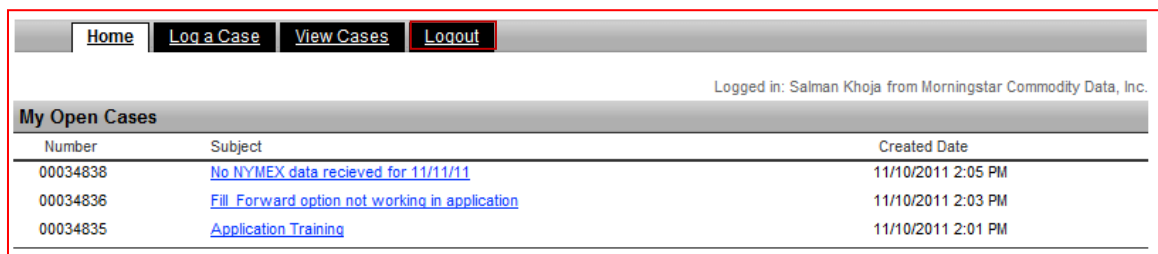
If you do not have your password available, click **Forgot your password?** Enter your user name and click **Submit**. You will receive an email with a temporary password. When you log in to the Self-Service portal, you will be asked to reset your password.

- Click **Login**.



The screenshot shows the 'Client Portal' login interface. It includes a title 'Client Portal', a 'Username:' label with an input field, a 'Password:' label with an input field, a checked checkbox for 'Accept Morningstar Commodity Data Terms and Conditions', and a 'Login' button.

Once logged in, you will be in the **Home** tab. To log out of the Self-Service portal, simply click the **Logout** tab.



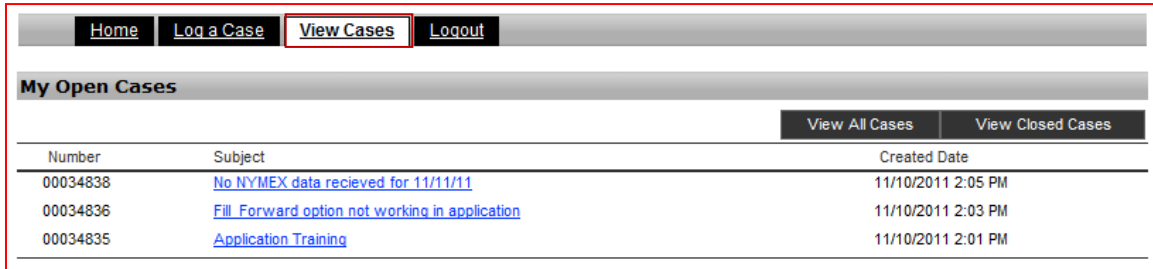
The screenshot shows the logged-in dashboard. At the top, there are navigation tabs: 'Home', 'Log a Case', 'View Cases', and 'Logout'. Below the tabs, it says 'Logged in: Salman Khoja from Morningstar Commodity Data, Inc.'. The main section is titled 'My Open Cases' and contains a table with three columns: 'Number', 'Subject', and 'Created Date'.

Number	Subject	Created Date
00034838	No NYMEX data recieved for 11/11/11	11/10/2011 2:05 PM
00034836	Fill Forward option not working in application	11/10/2011 2:03 PM
00034835	Application Training	11/10/2011 2:01 PM

Viewing Your Cases

In the Self-Service portal, the inquiries that you submit to the Customer Support team are called "cases." To view your open and resolved cases:

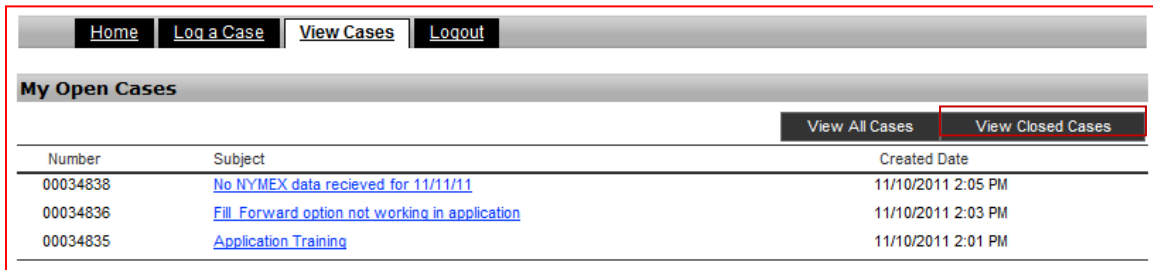
- Click the **View Cases** tab. The open cases that you have submitted are displayed. The title bar that is highlighted yellow will indicate what case view you are in.



The screenshot shows the top navigation bar with four tabs: Home, Log a Case, View Cases, and Logout. The 'View Cases' tab is highlighted with a yellow background. Below the navigation bar is a section titled 'My Open Cases'. To the right of this section are two buttons: 'View All Cases' and 'View Closed Cases'. Below these buttons is a table with three columns: Number, Subject, and Created Date. The table contains three rows of case data.

Number	Subject	Created Date
00034838	No NYMEX data recieved for 11/11/11	11/10/2011 2:05 PM
00034836	Fill Forward option not working in application	11/10/2011 2:03 PM
00034835	Application Training	11/10/2011 2:01 PM

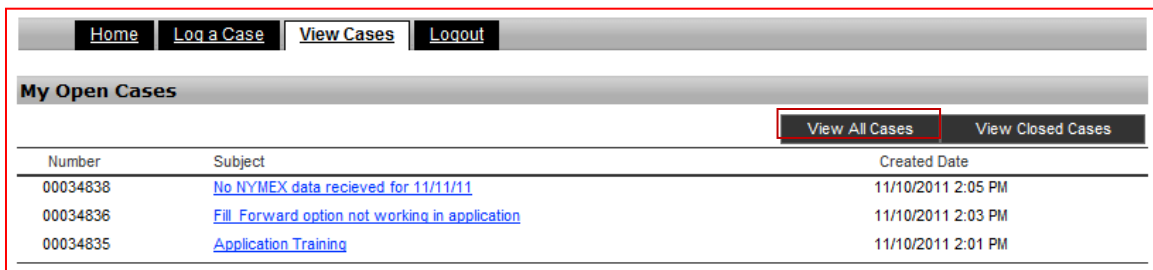
- Optionally, click the **View Closed Cases** button to view a list of your resolved cases.



The screenshot is identical to the previous one, but the 'View Closed Cases' button is highlighted with a yellow background.

Number	Subject	Created Date
00034838	No NYMEX data recieved for 11/11/11	11/10/2011 2:05 PM
00034836	Fill Forward option not working in application	11/10/2011 2:03 PM
00034835	Application Training	11/10/2011 2:01 PM

- If you are a Self-Service portal "super user," you will be able to view all of the open and resolved cases submitted by everyone in your company by clicking the **View All Cases** button.



The screenshot is identical to the previous ones, but the 'View All Cases' button is highlighted with a yellow background.

Number	Subject	Created Date
00034838	No NYMEX data recieved for 11/11/11	11/10/2011 2:05 PM
00034836	Fill Forward option not working in application	11/10/2011 2:03 PM
00034835	Application Training	11/10/2011 2:01 PM

After selecting **View all Cases**, you will be in the **All Open Cases** view.

Number	Subject	Created Date
00034839	Sunoco	11/10/2011 2:10 PM
00034838	No NYMEX data recieved for 11/11/11	11/10/2011 2:05 PM
00034836	Fill Forward option not working in application	11/10/2011 2:03 PM
00034835	Application Training	11/10/2011 2:01 PM
00034824	FW: Template Location	11/10/2011 11:49 AM

- While in any of the various views, select a case subject to view the details of the case.

Number	Subject	Created Date
00034839	Sunoco	11/10/2011 2:10 PM
00034838	No NYMEX data recieved for 11/11/11	11/10/2011 2:05 PM
00034836	Fill Forward option not working in application	11/10/2011 2:03 PM
00034835	Application Training	11/10/2011 2:01 PM
00034824	FW: Template Location	11/10/2011 11:49 AM

The case details are shown, including the case number, status, last modified date, and any comments that have been added to the case. Cases logged prior to the implementation of the Portal will not display case comments.

[Home](#) | [Log a Case](#) | [View Cases](#) | [Logout](#)

Case 00034838

Case Number: 00034838	Status: Open
Type: Issue	Case Origin: Phone
Contact Name: Salman Khoja	Date/Time Opened: 11/10/2011 2:05 PM
	Date/Time Closed:
	Last Modified Date: 11/10/2011 2:05 PM
Product: Data	
Subject: No NYMEX data recieved for 11/11/11	
Description:	

[Add Comment](#) | [Add Attachment](#)

Related Comments

Comment

11/10/2011 2:22 PM | Salman Khoja
 The data is being sent the server. We recieved the file late from the vendor. We processed the package as soon as it was recieved.

 the package name is : upd_1_nym_201111111

 the package should be picked up by the server in 20 minutes.

- Optionally, the **Home** tab displays all of your open cases when you log in. To view a case from the **Home** tab, click its subject.

- Optionally, Add a Comment or Attachment to your case

[Home](#) | [Log a Case](#) | [View Cases](#) | [Logout](#)

Case 00034838

Case Number: 00034838	Status: Open
Type: Issue	Case Origin: Phone
Contact Name: Salman Khoja	Date/Time Opened: 11/10/2011 2:05 PM
	Date/Time Closed:
	Last Modified Date: 11/10/2011 2:05 PM
Product: Data	
Subject: No NYMEX data recieved for 11/11/11	
Description:	

[Add Comment](#) | [Add Attachment](#)

Related Comments

Comment

11/10/2011 2:22 PM | Salman Khoja
The data is being sent the server. We recieved the file late from the vendor. We processed the package as soon as it was recieved.
the package name is : upd_1_nym_201111111
the package should be picked up by the server in 20 minutes.

- Click **Add Comment** to add a comment related to your specific case and Click Submit when done.

[Home](#) | [Log a Case](#) | [View Cases](#) | [Logout](#)

Submit Comment

Comment:

[Submit](#) | [Cancel](#)

- Click **Add Attachment** to add a file to your specific case that you think would assist the support team in answering your inquiry. This can be any file but especially, a Commodity Charts Worksheet, Commodity Query query, or Excel Workbook.

Attach File

1. Select the File
Type the path of the file or click the Browse button to find the file.

2. Click the "Attach File" button.
Repeat steps 1 and 2 to attach multiple files.
(When the upload is complete the file information will appear below.)

3. Click the Done button to return to the previous page.
(This will cancel an in-progress upload.)

Logging a New Case

If you have a new inquiry, you can submit a case to our Customer Support team. There are 2 ways to submit a case automatically; via email or through the portal

Via Email –

- Send an email to commoditydata-supportcases@morningstar.com including the details of your request or question.

Via the portal

- Click the **Log a Case** tab.

Home **Log a Case** View Cases Logout

Logged in: Salman Khoja from Morningstar Commodity Data, Inc.

My Open Cases

Number	Subject	Created Date
00034838	No NYMEX data recieved for 11/11/11	11/10/2011 2:05 PM
00034836	Fill Forward option not working in application	11/10/2011 2:03 PM
00034835	Application Training	11/10/2011 2:01 PM

- Select the type of case you are logging from the drop-down, either Question or Issue.

[Home](#) [Log a Case](#) [View Cases](#) [Logout](#)

For CRITICAL issues, please call:

Americas: Toll free: (+1 800 546-9646)

Direct: +1 (512) 697-3160, select "Option 1"

UK: +0800 032 6063

Europe: +44 20 7190 2947

For help logging a case, [click here](#).

Log a Case

Type: *
Question ▼

Product:
--None-- ▼

Subject: *

Description: *

Case Origin:
Web

- Select the Product that the case is in reference to.

[Home](#) | [Log a Case](#) | [View Cases](#) | [Logout](#)

For **CRITICAL** issues, please call:

Americas: Toll free: (+1 800 546-9646)
 Direct: +1 (512) 697-3160, select "Option 1"
UK: +0800 032 6063
Europe: +44 20 7190 2947

For help logging a case, [click here](#).

Log a Case

Type: *
 Question ▼

Case Origin:
 Web

Product:

- None--
- API
- Citrix
- CMDTY Dashboard
- Commodity Add-in
- Commodity Charts
- Commodity Charts Microsoft Excel
- Commodity Charts WS DataLoader
- Commodity DataServer
- Commodity DataServer Add-in (Microsoft Excel)
- Commodity Query
- Data
- Delta Publisher
- Formula Loader
- MLab WS
- MRKTPLCE
- Other
- RLIM WS

Submit Cancel

- Use guide to help select the appropriate product
 - **API** – Inquiry regarding API programming
 - **Citrix** - Inquiry regarding connecting /running the applications through the Citrix website
 - **CMDTY Dashboard** – Inquiry regarding the Commodity Dashboard program
 - **Commodity Add-In** - Inquiry regarding usage or behavior of the Commodity Add-in application
 - **Commodity Charts** – Inquiry regarding usage or behavior of the Commodity Charts application
 - **Commodity Charts Microsoft Excel** – Inquiry regarding running Commodity Charts worksheets inside Excel
 - **Commodity Charts WS DataLoader** – Inquiry regarding running Commodity Charts Webservice Data Loader.
 - **Commodity DataServer** – Inquiry regarding Server questions or issues

-
- **Commodity DataServer Excel Add-in** – Inquiry regarding usage or behavior in the Commodity DataServer Excel Add-in (not to be confused with the Commodity Charts Excel)
 - **Commodity Query** – Inquiry regarding usage or behavior of the Commodity Query application
 - **Data** - Inquiry regarding the data (availability, location or source), data dispute or missing data issue
 - **Delta Publisher** – Inquiry regarding usage or behavior of the Delta Publisher
 - **Formula Loader** – Inquiry regarding the Formula Loader that loads the data output from saved queries
 - **MLab WS** - Inquiry regarding usage or behavior of the MLab WS.
 - **MRKTPLCE** – Inquiry regarding subscription or content on Market Place.
 - **Other** – Select if none of the products represents your inquiry
 - **RLIM WS** - Inquiry regarding usage or behavior of the RLIM WS.

*If you are logging a case regarding the data then the product is Data regardless of which application you are using.

- Enter a subject and description for your case. Enter as much information as you can to assist our Customer Support reps in responding to your inquiry.
- Click **Submit** to complete the issue

[Home](#) | [Log a Case](#) | [View Cases](#) | [Logout](#)

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Direct: +1 (512) 697-3160, select "Option 1"

UK: +0800 032 6063

Europe: +44 20 7190 2947

For help logging a case, [click here](#).

Log a Case

Type: *	Case Origin:
Question	Web
Product:	
Data	
Subject: *	
Do you have Natural Gas Futures from the NYMEX?	
Description: *	
I need to know where I can find the symbol for NYMEX Natural Gas? Here is the site where I am looking at and need to find these prices in Commodity Charts:	
http://www.cmegroup.com/trading/energy/natural-gas/natural-gas_quotes_settlements_futures.html	

- Once the issue is submitted, click **Add Comment** to add additional comments related to your specific case.
- Additionally, you can click **Add Attachment** to add a file to your specific case that you think would assist the support team in answering your inquiry.

[Home](#) | [Log a Case](#) | [View Cases](#) | [Logout](#)

Case 00034842

Case Number: 00034842	Status: Open
Type: Question	Case Origin: Web
Contact Name: Salman Khoja	Date/Time Opened: 11/10/2011 2:43 PM
	Date/Time Closed:
	Last Modified Date: 11/10/2011 2:43 PM
Product: Data	
Subject: Do you have Natural Gas Futures from the NYMEX?	
Description: I need to know where I can find the symbol for NYMEX Natural Gas? Here is the site where I am looking at and need to find these prices in Commodity Charts: http://www.cmegroup.com/trading/energy/natural-gas/natural-gas_quotes_settlements_futures.html	

Add Comment
Add Attachment

Related Comments

None Found

Email Notifications

Email notifications will be sent when the following actions take place.

- You, as a customer/user, log a case through the portal: –
Email is sent to the user and Morningstar Commodity Data support indicating a new case has been created
- You, as a customer/user, adds a comment or an attachment to an issue:
Morningstar Commodity Data Support gets an email indicating that the case has been updated
- Morningstar Commodity Data support staff enters a public comment: –

You, as a customer/user, gets an email indicating that the case has been updated.

- Morningstar Commodity Data support staff closes the case –
User gets an email indicating the case has been closed