


Viewing Portal Activity / History

Once the Portal is activated, you may want to view the activity of the Portal to see what has been read, downloaded and uploaded. This is useful to ensure the client has been keeping up to date with their responsibilities.

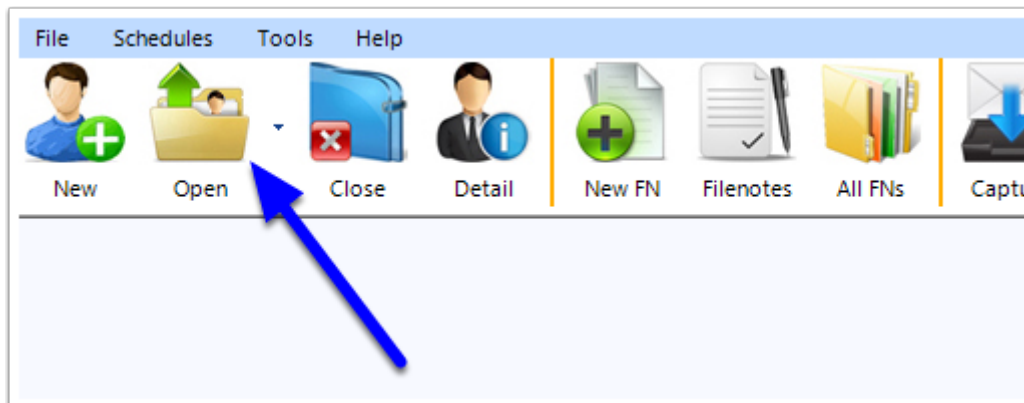
Viewing the Portal History

 This guide is on the assumption that you have already [Activated the Portal for the client](#) and sent document requests, messages etc.

1. Viewing Portal History from the Matter

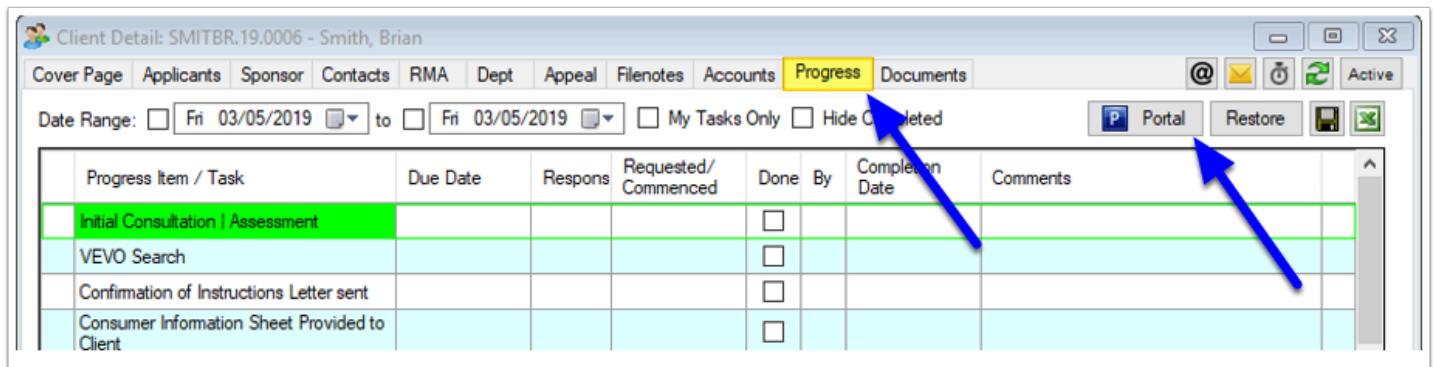
1.1. Open the Matter

Click the **Open** button from the **Main Toolbar**.



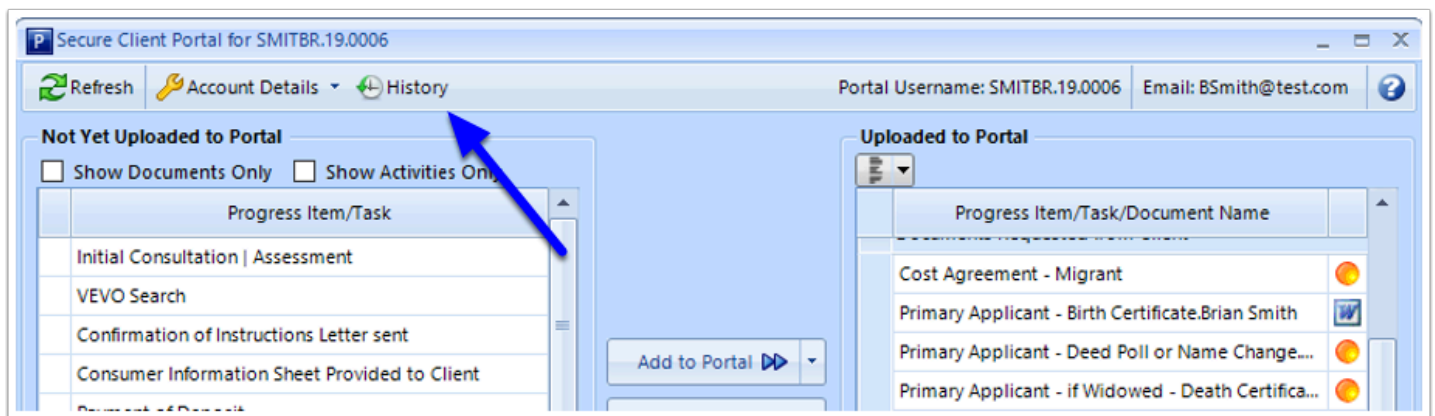
1.2. Go to the Portal window

Go to the **Progress** Tab, then click the **Portal** button.



1.3. Go into History

In the Secure Client Portal window, click the **History** button.



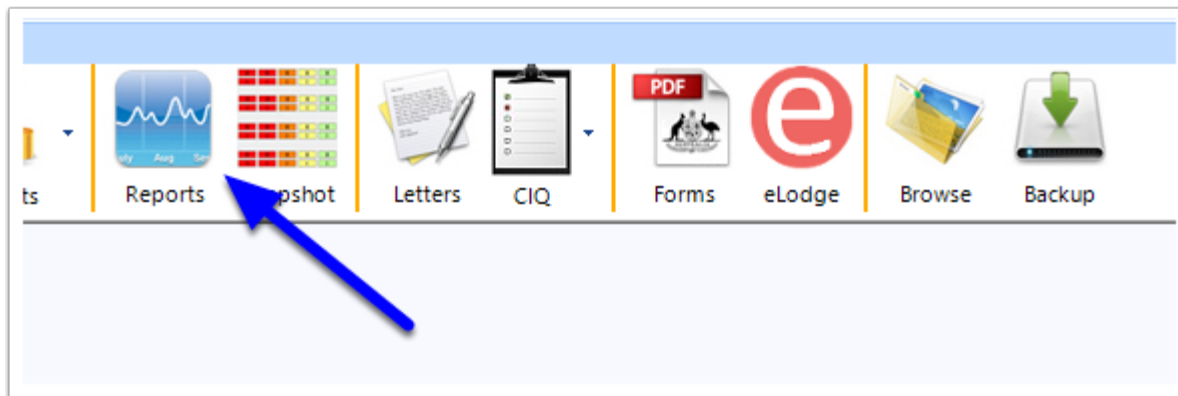
1.4. The Portal History Screen will appear

Date	Description	User Name	Machine And...
03/05/19 11:40:08AM	Client downloaded a document 'Form 80.Brian Smith.SMITBR.19.0006.MP 3-May-2019 1139.pdf' 13 minutes ago		
03/05/19 11:40:02AM	Client read a secure message 'Form 80 to be signed' 13 minutes ago		
03/05/19 11:39:50AM	Marco Polo sent a secure message 'Form 80 to be signed' 14 minutes ago	Marco Polo	CRAIG-PC\Craig
03/05/19 11:39:50AM	Marco Polo uploaded a document 'Form 80.Brian Smith.SMITBR.19.0006.MP 3-May-2019 1139.pdf' 14 minutes ago	Marco Polo	CRAIG-PC\Craig

2. Viewing Portal History from Reports

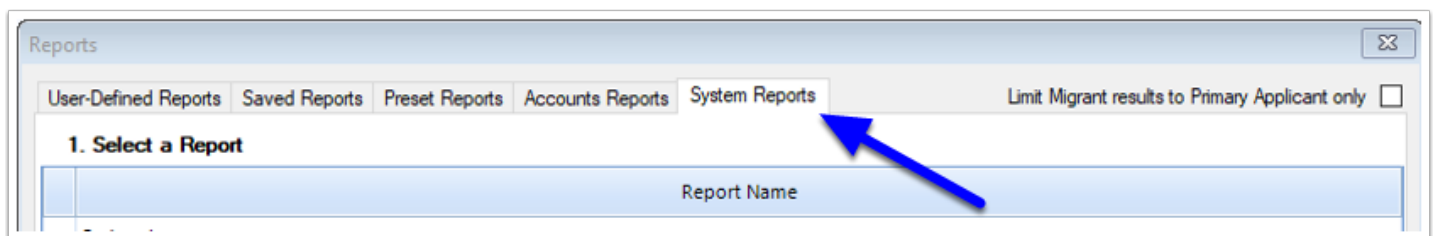
2.1. Go to Reports

Click the **Reports** button from the **Main Toolbar**.



2.2. Go to System Reports

Select the **System Reports** tab.



2.3. Run the Portal – History Report

1. Choose **Portal - History**.
2. Select the required **Date Range** and the **Matter** to search on.
3. You can also Filter by the **Date Uploaded** or **Date Downloaded**.

Reports ⌵

User-Defined Reports | Saved Reports | Preset Reports | Accounts Reports | System Reports Limit Migrant results to Primary Applicant only ☒

1. Select a Report

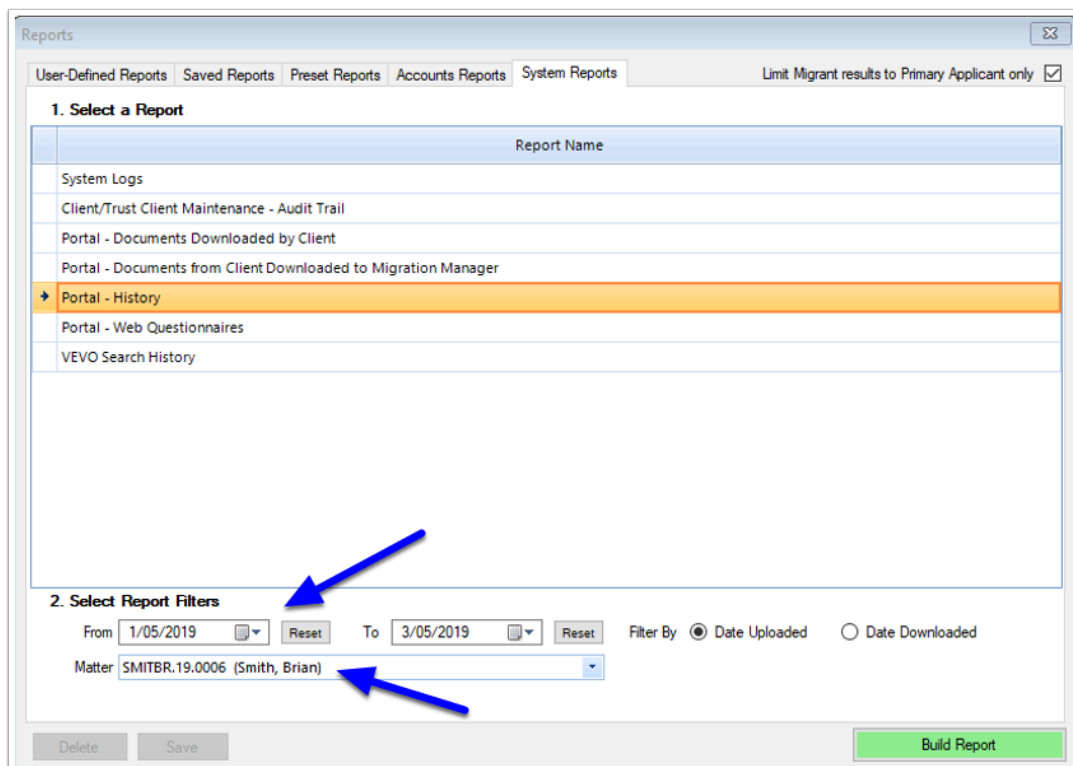
Report Name
System Logs
Client/Trust Client Maintenance - Audit Trail
Portal - Documents Downloaded by Client
Portal - Documents from Client Downloaded to Migration Manager
→ Portal - History
Portal - Web Questionnaires
VEVO Search History

2. Select Report Filters

From: 1/05/2019 ⌵ Reset To: 3/05/2019 ⌵ Reset Filter By: ☒ Date Uploaded ☐ Date Downloaded

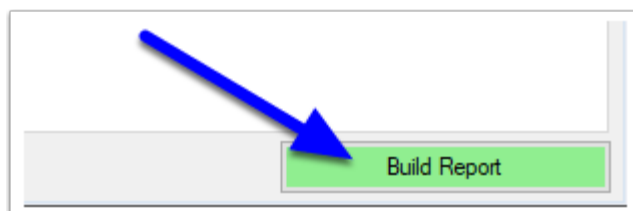
Matter: SMITBR.19.0006 (Smith, Brian) ⌵

Delete Save Build Report



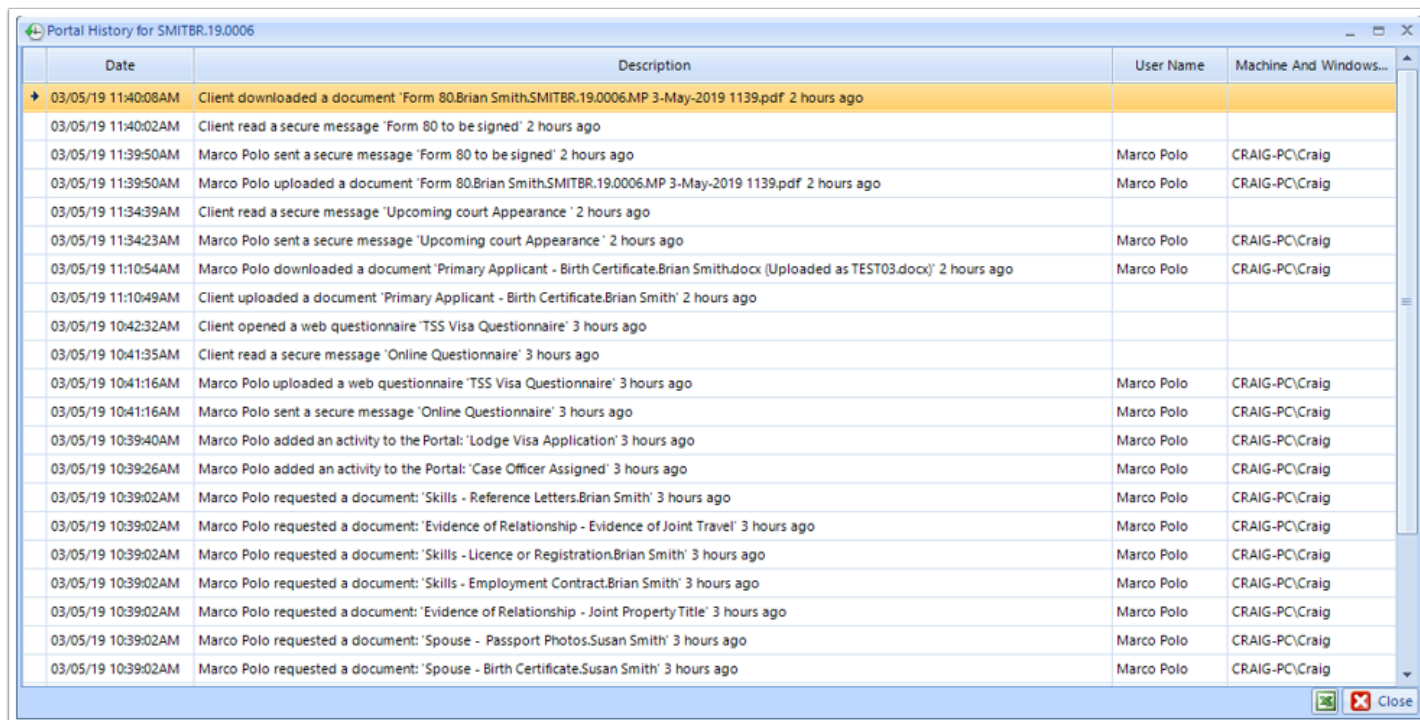
2.4. Build the Report

Click **Build Report**.



Build Report

2.5. The Portal History will display



Date	Description	User Name	Machine And Windows...
03/05/19 11:40:08AM	Client downloaded a document 'Form 80.Brian Smith.SMITBR.19.0006.MP 3-May-2019 1139.pdf' 2 hours ago		
03/05/19 11:40:02AM	Client read a secure message 'Form 80 to be signed' 2 hours ago		
03/05/19 11:39:50AM	Marco Polo sent a secure message 'Form 80 to be signed' 2 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 11:39:50AM	Marco Polo uploaded a document 'Form 80.Brian Smith.SMITBR.19.0006.MP 3-May-2019 1139.pdf' 2 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 11:34:39AM	Client read a secure message 'Upcoming court Appearance' 2 hours ago		
03/05/19 11:34:23AM	Marco Polo sent a secure message 'Upcoming court Appearance' 2 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 11:10:54AM	Marco Polo downloaded a document 'Primary Applicant - Birth Certificate.Brian Smith.docx (Uploaded as TEST03.docx)' 2 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 11:10:49AM	Client uploaded a document 'Primary Applicant - Birth Certificate.Brian Smith' 2 hours ago		
03/05/19 10:42:32AM	Client opened a web questionnaire 'TSS Visa Questionnaire' 3 hours ago		
03/05/19 10:41:35AM	Client read a secure message 'Online Questionnaire' 3 hours ago		
03/05/19 10:41:16AM	Marco Polo uploaded a web questionnaire 'TSS Visa Questionnaire' 3 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 10:41:16AM	Marco Polo sent a secure message 'Online Questionnaire' 3 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 10:39:40AM	Marco Polo added an activity to the Portal: 'Lodge Visa Application' 3 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 10:39:26AM	Marco Polo added an activity to the Portal: 'Case Officer Assigned' 3 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 10:39:02AM	Marco Polo requested a document: 'Skills - Reference Letters.Brian Smith' 3 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 10:39:02AM	Marco Polo requested a document: 'Evidence of Relationship - Evidence of Joint Travel' 3 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 10:39:02AM	Marco Polo requested a document: 'Skills - Licence or Registration.Brian Smith' 3 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 10:39:02AM	Marco Polo requested a document: 'Skills - Employment Contract.Brian Smith' 3 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 10:39:02AM	Marco Polo requested a document: 'Evidence of Relationship - Joint Property Title' 3 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 10:39:02AM	Marco Polo requested a document: 'Spouse - Passport Photos.Susan Smith' 3 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 10:39:02AM	Marco Polo requested a document: 'Spouse - Birth Certificate.Susan Smith' 3 hours ago	Marco Polo	CRAIG-PC\Craig

3. Understanding Portal History - the Portal Descriptions

Notifications - From Agent To Portal records

1. **Documents Requests** or **Activities** added to the Portal by the agent. These will show the Migration Manager User Name and the Machine ID (computer Name) where the request was made from.
2. When a **Web Questionnaire** is sent from the Agent, 2 records will display. The Notification that the message was sent (containing the Questionnaire) and that the Web Questionnaire itself has been uploaded.
3. When a **Secure Portal Message** has been sent.
4. When a **Document is uploaded** by the Agent to the Portal, 2 records will display. The Notification that the message was sent (containing the Document) and that the Document itself has been uploaded.

Portal History for SMITBR.19.0006				
Date	Description	User Name	Machine And Windows...	
03/05/19 11:40:08AM	Client downloaded a document 'Form 80.Brian Smith.SMITBR.19.0006.MP 3-May-2019 1139.pdf' 2 hours ago			
03/05/19 11:40:02AM	Client read a secure message 'Form 80 to be signed' 2 hours ago			
03/05/19 11:39:50AM	Marco Polo sent a secure message 'Form 80 to be signed' 2 hours ago	Marco Polo	CRAIG-PC\Craig	4
03/05/19 11:39:50AM	Marco Polo uploaded a document 'Form 80.Brian Smith.SMITBR.19.0006.MP 3-May-2019 1139.pdf' 2 hours ago	Marco Polo	CRAIG-PC\Craig	
03/05/19 11:34:39AM	Client read a secure message 'Upcoming court Appearance' 2 hours ago			
03/05/19 11:34:23AM	Marco Polo sent a secure message 'Upcoming court Appearance' 2 hours ago	Marco Polo	CRAIG-PC\Craig	3
03/05/19 11:10:54AM	Marco Polo downloaded a document 'Primary Applicant - Birth Certificate.Brian Smith.docx (Uploaded as TEST03.docx)' 2 hours ago	Marco Polo	CRAIG-PC\Craig	
03/05/19 11:10:49AM	Client uploaded a document 'Primary Applicant - Birth Certificate.Brian Smith' 2 hours ago			
03/05/19 10:42:32AM	Client opened a web questionnaire 'TSS Visa Questionnaire' 3 hours ago			
03/05/19 10:41:35AM	Client read a secure message 'Online Questionnaire' 3 hours ago			
03/05/19 10:41:16AM	Marco Polo uploaded a web questionnaire 'TSS Visa Questionnaire' 3 hours ago	Marco Polo	CRAIG-PC\Craig	2
03/05/19 10:41:16AM	Marco Polo sent a secure message 'Online Questionnaire' 3 hours ago	Marco Polo	CRAIG-PC\Craig	
03/05/19 10:39:40AM	Marco Polo added an activity to the Portal: 'Lodge Visa Application' 3 hours ago	Marco Polo	CRAIG-PC\Craig	
03/05/19 10:39:26AM	Marco Polo added an activity to the Portal: 'Case Officer Assigned' 3 hours ago	Marco Polo	CRAIG-PC\Craig	
03/05/19 10:39:02AM	Marco Polo requested a document: 'Skills - Reference Letters.Brian Smith' 3 hours ago	Marco Polo	CRAIG-PC\Craig	
03/05/19 10:39:02AM	Marco Polo requested a document: 'Evidence of Relationship - Evidence of Joint Travel' 3 hours ago	Marco Polo	CRAIG-PC\Craig	
03/05/19 10:39:02AM	Marco Polo requested a document: 'Skills - Licence or Registration.Brian Smith' 3 hours ago	Marco Polo	CRAIG-PC\Craig	1
03/05/19 10:39:02AM	Marco Polo requested a document: 'Skills - Employment Contract.Brian Smith' 3 hours ago	Marco Polo	CRAIG-PC\Craig	
03/05/19 10:39:02AM	Marco Polo requested a document: 'Evidence of Relationship - Joint Property Title' 3 hours ago	Marco Polo	CRAIG-PC\Craig	
03/05/19 10:39:02AM	Marco Polo requested a document: 'Spouse - Passport Photos.Susan Smith' 3 hours ago	Marco Polo	CRAIG-PC\Craig	
03/05/19 10:39:02AM	Marco Polo requested a document: 'Spouse - Birth Certificate.Susan Smith' 3 hours ago	Marco Polo	CRAIG-PC\Craig	

Notifications - From Portal To Agent

1. Notification that the client has **read a message** on the Portal.
2. Notification when a **Questionnaire has been opened** by the client.
3. Notification that the client has **Uploaded a document (for the Agent)** onto the Portal.
4. Notification that the Document (point 3 above) has now been **Downloaded** (transferred) to **the Matter within Migration Manager**.
5. Notification that the **client has downloaded a document from the Portal**.

Date	Description	User Name	Machine And Windows...
03/05/19 11:40:08AM	Client downloaded a document 'Form 80.Brian Smith.SMITBR.19.0006.MP 3-May-2019 1139.pdf' 2 hours ago		
03/05/19 11:40:02AM	Client read a secure message 'Form 80 to be signed' 2 hours ago		
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03/05/19 11:39:50AM	Marco Polo uploaded a document 'Form 80.Brian Smith.SMITBR.19.0006.MP 3-May-2019 1139.pdf' 2 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 11:34:39AM	Client read a secure message 'Upcoming court Appearance' 2 hours ago		
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03/05/19 11:10:54AM	Marco Polo downloaded a document 'Primary Applicant - Birth Certificate.Brian Smith.docx (Uploaded as TEST03.docx)' 2 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 11:10:49AM	Client uploaded a document 'Primary Applicant - Birth Certificate.Brian Smith' 2 hours ago		
03/05/19 10:42:32AM	Client opened a web questionnaire 'TSS Visa Questionnaire' 3 hours ago		
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03/05/19 10:39:02AM	Marco Polo requested a document: 'Skills - Licence or Registration.Brian Smith' 3 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 10:39:02AM	Marco Polo requested a document: 'Skills - Employment Contract.Brian Smith' 3 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 10:39:02AM	Marco Polo requested a document: 'Evidence of Relationship - Joint Property Title' 3 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 10:39:02AM	Marco Polo requested a document: 'Spouse - Passport Photos.Susan Smith' 3 hours ago	Marco Polo	CRAIG-PC\Craig
03/05/19 10:39:02AM	Marco Polo requested a document: 'Spouse - Birth Certificate.Susan Smith' 3 hours ago	Marco Polo	CRAIG-PC\Craig

1. The **User Name** and **Machine and Windows Login Name** will only appear on items where the activity has come in or out of Migration Manager. Activity from the customer (within the Portal) will show these fields as blank.

2. Downloaded item (such as completed Forms downloaded or the Web Questionnaire) from the Portal to Migration Manager) will show a **User Name** and **Machine and Windows Login Name**. This is not necessarily the RMA or person responsible for this Matter. Migration Manager downloads documents at timed intervals meaning the first machine to start Migration Manager for the day will most likely be the machine that downloads the document. The physical machine for these records is recorded simply so the agent or Support can help troubleshoot where a document might be if an Agent is having technical syncing issues within their network.

4. Checking the Progress of a Web Questionnaire

As well as the above Portal History, when using Web Questionnaires the Agent can now view the progression of a Web Questionnaire in progress.

Note: You can only view/check the progress of a partially completed questionnaire. You can not import it yet as the client has not finalised the Questionnaire.

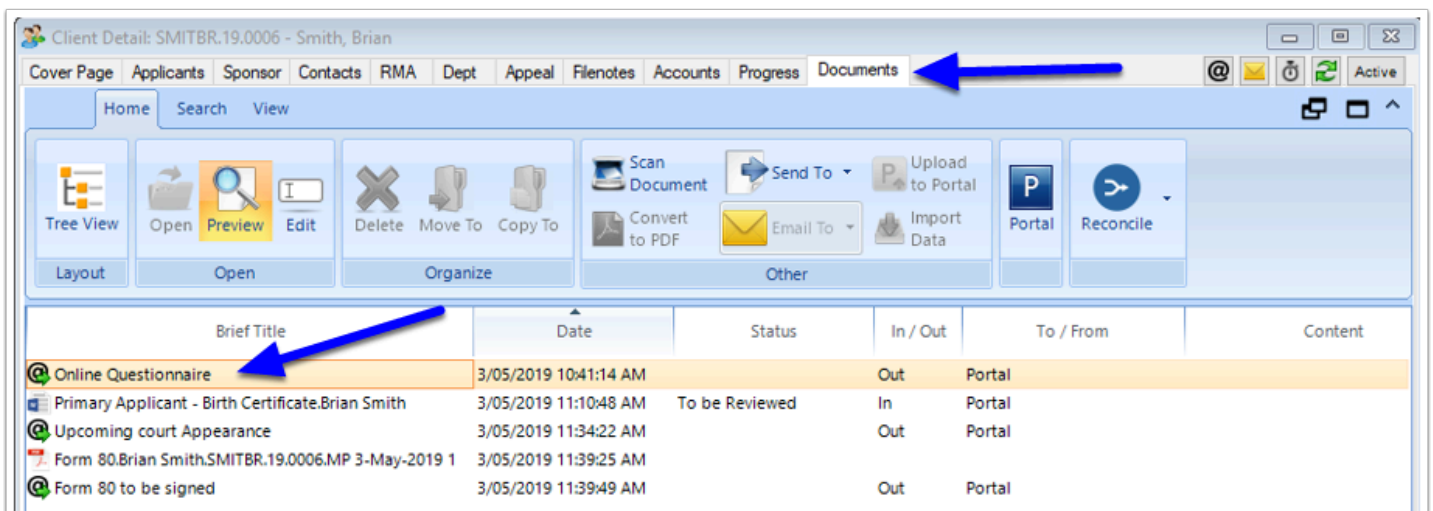
4.1. Open the Matter

Click the **Open** button from the **Main Toolbar**.



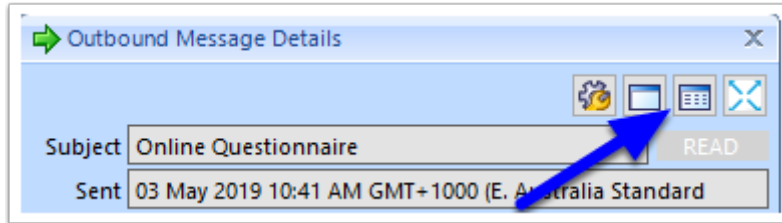
4.2. Find the Web Questionnaire Message

1. Go to the **Documents** tab.
2. Select the **Outbound Web Questionnaire message** and double click to open it.



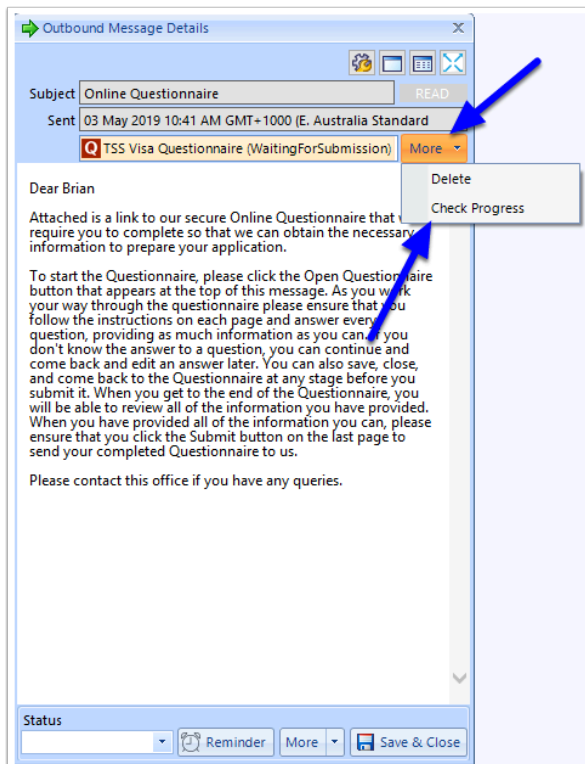
4.3. Select 'Show All Details'

If your preview opens in 'Document Only' view, click the 'Show All Details' button to view additional options.



4.4. Check the Progress

Click the **More** dropdown and select **Check Progress**.



4.5. View details

When the Preview appears, you will be able to select the various tabs on the left to view what information the client has completed and saved so far.

Preview CIQ - TSS Visa Questionnaire

Preparer

Preparer Details

Brian Jones Smith (Primary Applicant)

Details

Other

Identity

Employment

Education

Skills

Language

Spouse (name missing) (Non-Included Family)

Details

Other

Children

Relationships

Current Relationship

All Applicants

Addresses

Contact Details

Visas

Travel History

Health

Character

Collapse All

Print All

Questionnaire Answers

Personal Details for Brian Jones Smith

Prefix/Title	Mr
Family Name	Smith
Given Names	Brian Jones
Preferred Names	Brian
Gender	Male
Date of Birth	17/02/1988
Country of Birth	United Kingdom
City or Town of Birth	London
State or Province of Birth	
What is your marital status?	Married

4.6. Close

When you have finished, click Close.

