Web Portal Introduction

- Row Editor
- Class of Service
- Overview
- Overview Components
- Grid Components

Row Editor

This page includes specifics on modifying data within the individual screens in the web portal.

- Rows
- Drop Down Menu
- Fill Form
- Checkboxes
- Editing Pre-Existing Entries
- Form Validation
- Deleting data
- Saving Data

Rows

Rows are the individual points of data that you can modify, view, or both. Within rows, there may be various options for editing the data, as well as dynamic or view-only options as well.

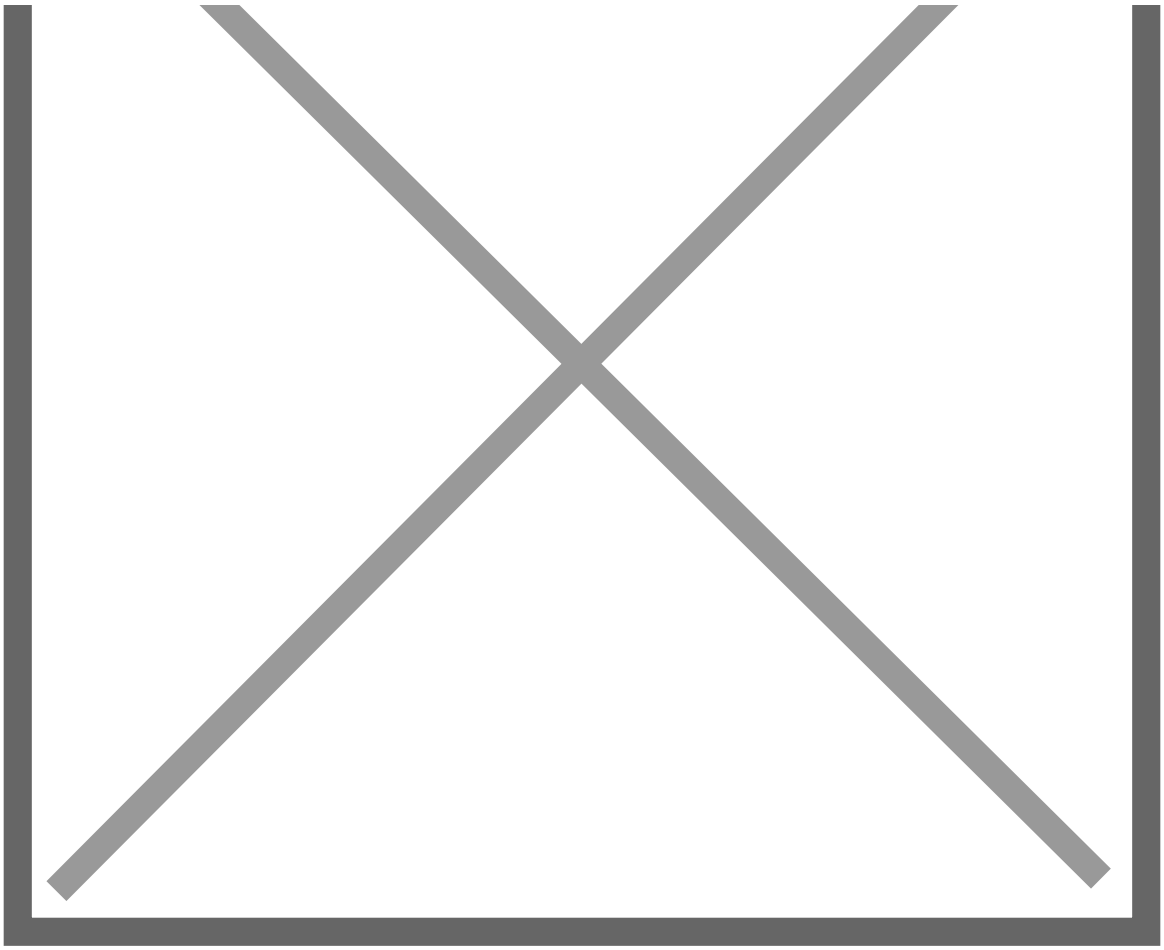


image.png

Drop Down Menu

When an option has multiple fixed values available, this will typically be displayed as a drop-down menu as shown below. To access the drop simply click on the box itself.

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Fill Form

A fill form is a form where you enter the data yourself, depending on the form there may be no restrictions to space and characters, whereas others may require no spaces or special characters.

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Checkboxes

Check boxes represent values that are essentially a yes or no (true or false) value. You simply click on the check box to check it or un-check it.

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Editing Pre-Existing Entries

If you wish to edit a pre-existing entry within the web portal you simply need to click the row you wish to edit.

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Form Validation

When editing or adding data in forms you will often notice at the bottom of the individual boxes that a squiggle line may span the entirety of the box. In the example below, you will see **blue squiggles** at the bottom of each box. This indicates that these fields are required.

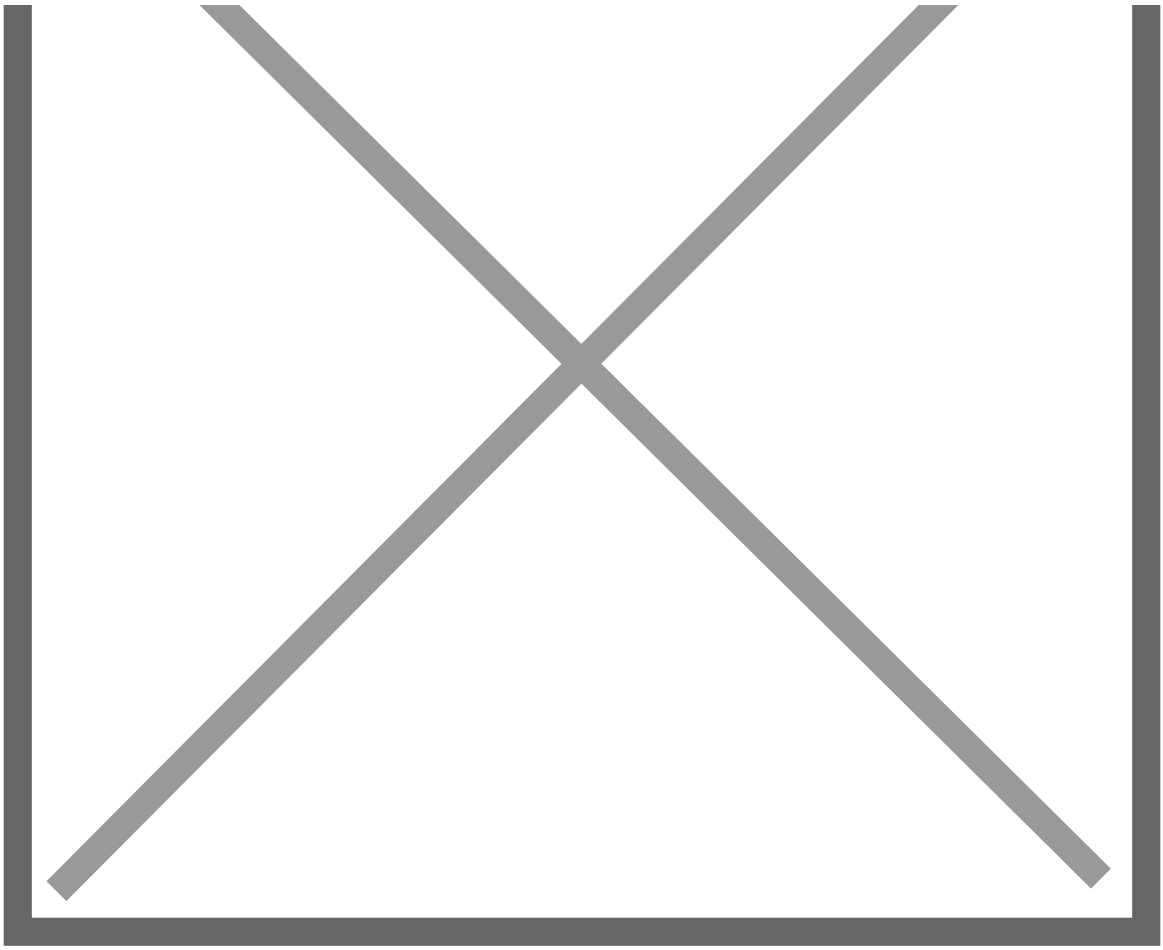


image.png

In the following example, you will see **red squiggles** in the field under the column **MAC**, this indicates that the entry submitted is invalid, and must be corrected. The web portal will not allow you to save until all fields with a red squiggle are corrected.

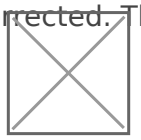


image.png

In the example below, you will see a field under the column **Description** without squiggles, this indicates that the field is optional and does not require an entry.

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Since the **MAC** field is not valid, the web portal is smart and will not allow you to save data. The same goes for mandatory fields that have a blue squiggle underlining them. This is to prevent the saving of any invalid data that could potentially cause a system to not function properly.

image.png

Deleting data

Generally speaking in almost all parts of the web portal you have the ability to delete individual data/records by clicking on a red X located on the far right-hand side of a screen (you may have to scroll) in an action column.

image.png

Whenever you delete data, a pop-up will appear graying out the web portal behind giving you the option to confirm, You will always see the option of **OK**, which will delete the entry and then save (followed by the **Save Changes** message), or **Cancel,** which will remove the pop-up and not change anything. It can always be assumed by clicking **OK** you are removing the data in question permanently, so when wondering about what things should be removed, contact your system administrator.

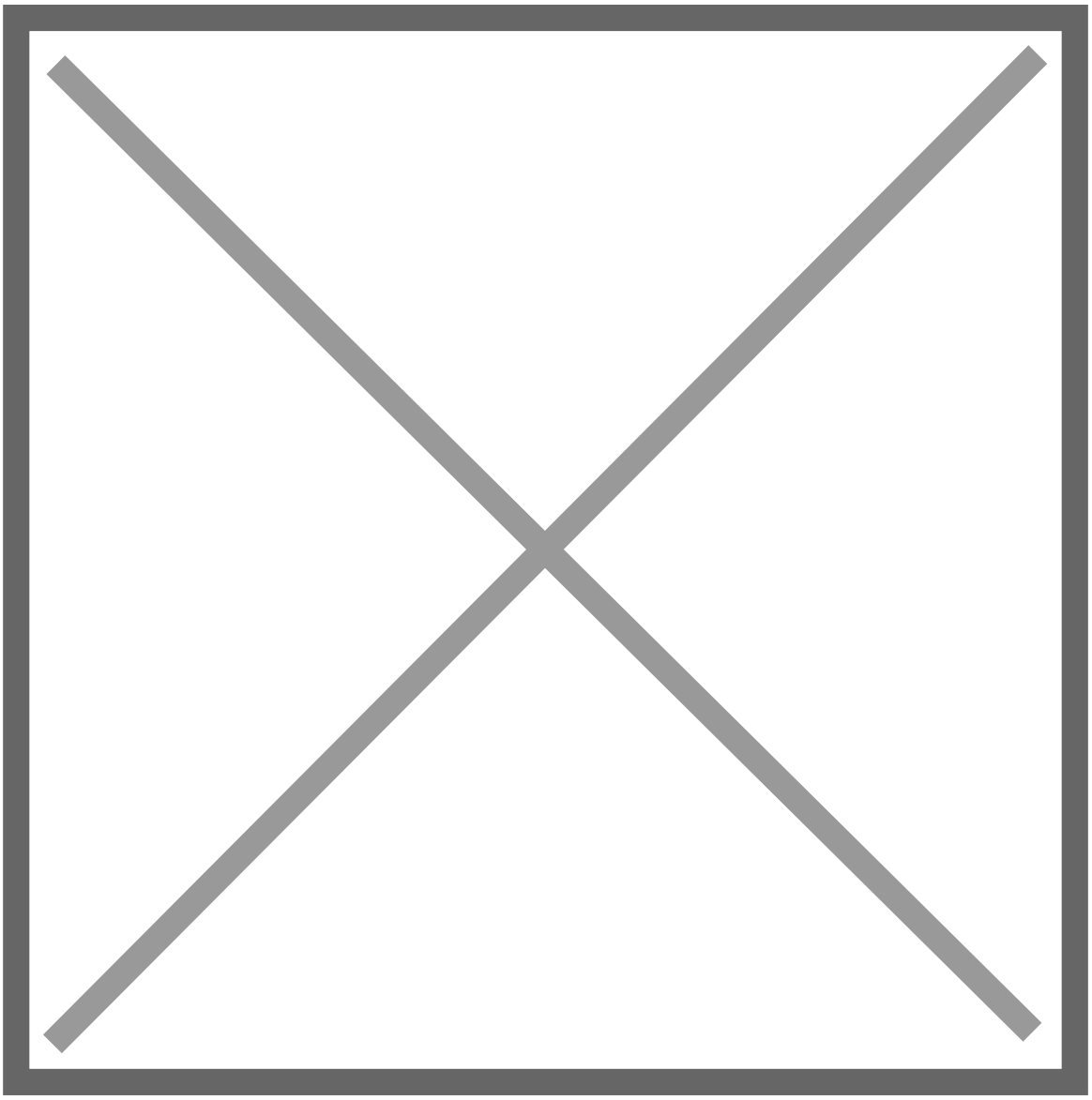
> After clicking "OK", your data is **permanently** deleted.

image.png

Saving Data

Anytime you complete an action such as inserting, updating, or deleting records, a green confirmation saying **Changes Saved** will always show if the settings have been saved successfully. This confirmation appears at the top center of the IntellaSoft Web Portal. If it doesn't display after a modification, double-check for errors and if you still have difficulties, consult with this documentation or lastly your system administrator for proper escalation.

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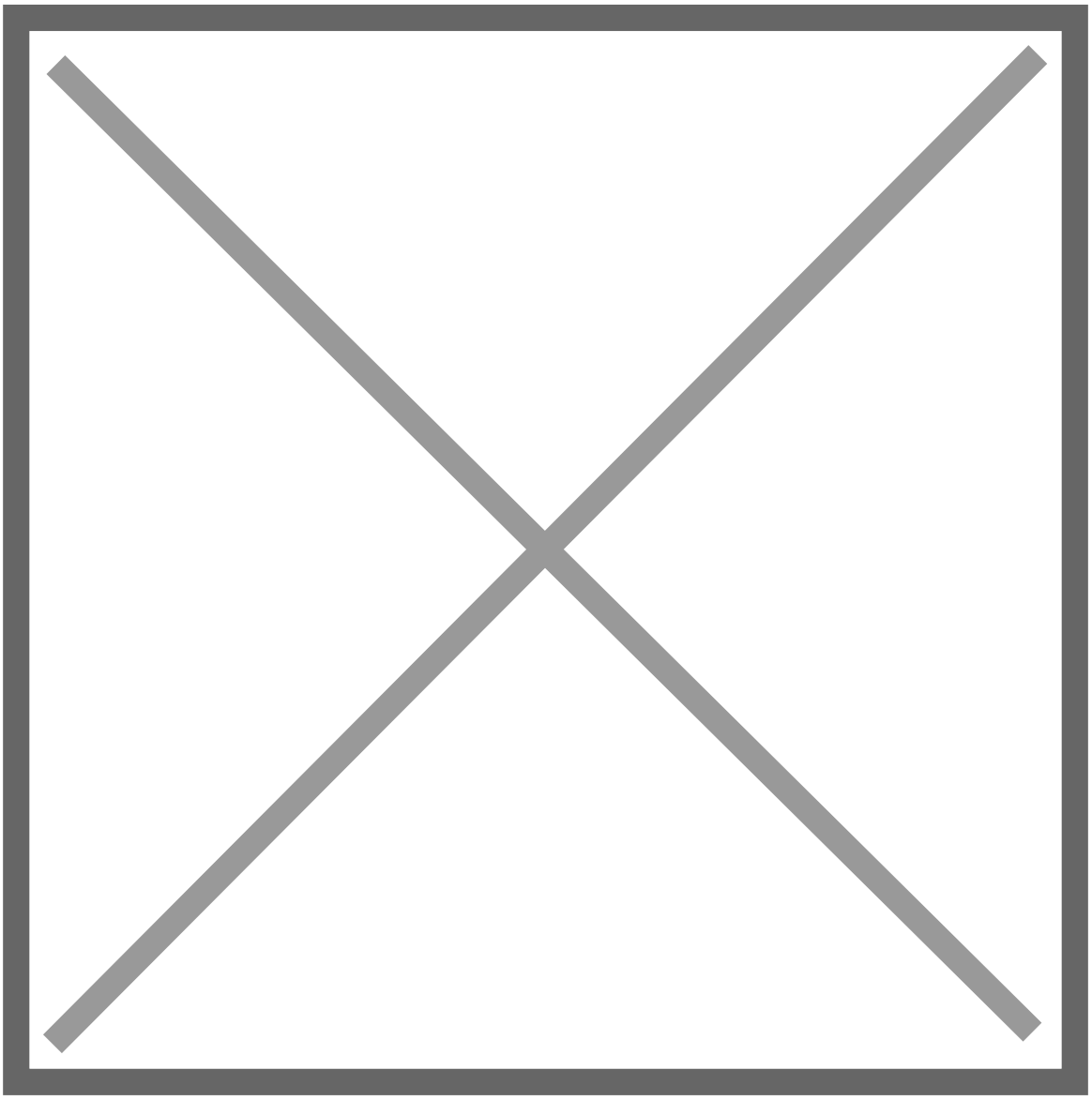


Class of Service

Throughout the web portal, you will see certain screens have a class of service value that must be selected. The class of service can be thought of as a security feature. Currently, the following **screens** have this value:

- Extensions
- Hunt Groups
- PhoneMap Groups

Example of a class of service



A Class of Service defines what numbers an associated group can call. It is possible to set up specific classes of service to handle specific numbers. By default, most Intellasoft installations will

come with 4 default classes of service.

Class of Service	Description
Internal Calls	Can call internal extensions only.
Internal + Local Calls	Same as above but can additionally call numbers with a local area code.
Internal + Local + Long Distance Calls	Same as above but can additionally call numbers that are long distance (non-local area code).
International + Local + Long Distance + International Calls	Same as above but can additionally call numbers that are internationally based.

Additional options are available for creating **classes of services,** but you will need to contact your system administrator/IntellaSoft representative for options on configuring this. It is important to note that the class of service applies to calls that are being transferred from the extension/group that the class of service applies to. There are also options for blocking certain calls at the forefront without them gaining access to the phone system such as the IVR (Interactive Voice Response), live agents, individual extensions, etc.

Overview

This section covers the core basics of the web portal. If this is your first time using the web portal, start by getting familiar with logging in, basic navigation and account management in the **Top Level Interface Components** section. Afterward, familiarize yourself with the **Grid Components** layout/editing capability and, lastly, how to change data using the **Row Editor.**

Pages within the Web Portal Introduction:

1. **Top Level Interface Components** - This section includes the absolute minimums of the web portal. You can start by navigating to your organization's URL. This web address will be given to you by your company's system administrator or an Intellasoft representative.
2. **Grid Components** - Grids contain web portal components for modifying existing data or adding new company-specific information. Although the exact information displayed in web portal examples will vary from your displayed screen, the general technique for adding/changing information will still be covered in this documentation's respective screen pages.
3. **Row Editor** - Modify data within any displayed row on the web portal by using standard widgets.
4. **Class of Service** - Outgoing call permissions can be assigned for hunt groups, extensions, and phone map groups using the web portal screens.

Documentation Formatting

For the purposes of this handbook anytime a specific feature (such as a button, tab, screen, module, etc.) is specified in the guide it will be in a capitalized **Bold Face.** The **red boxes** outlining anything within the web portal indicate areas of attention.

Overview Components

Overview

This section includes the absolute minimums of the web portal. You can start by navigating to your organization's URL which will be given to you by your system administrator or Intellasoft representative. Afterwards you will see a login screen. Start by following the instructions below to get familiar with the platform.

- Logging In
- Top Level Interface Components
- My Account
- Logout
- Navigation
- Screen Content Area
- Screens
- Panel Sizer Bar
- Panel Tools
- Group Selection

Logging In



You will need the proper URL address for your organization as well as your username and password which can be requested from your system administrator. Once you navigate to the portal, input your credentials as shown above. If you are unable to login after a few attempts, please contact your system administrator for assistance.

Top Level Interface Components

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image.png

image.png

Top bar	The account management bar along the top of the window is used to change your password or logout.
Left panel	The navigation panel at the left of the screen is for navigating to different screens within the web portal.
Right panel	The content area, filling the majority of the window, will display information and tools based on the selected screen.

My Account

image.png

To change the account password, click on the **My Account** menu located at the top left corner. Next click the **Change password for my account: <username>** button.

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Within the popup, enter your **Current Portal Password** and **New Portal Password**. Click **Save** and there will be a confirmation of **Success - Saved password** or **Invalid current password** if the current portal password is incorrect. Click **OK** to continue.

Logout

image.png

Closing the browser is not enough to be logged out since the Intellasoft Web Portal uses cookies. Remaining idle for an extended period of time may not do the trick either, depending on the specific timeout settings. The best way to logout is to use the **Logout** button in the upper right-hand corner.

Navigation

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The red box panel on the left is the **Navigation**. From here you are able to select the various **Screens** (also called **Modules**) within the IntellaSoft platform. To select a specific **Screen,** click on the name you want to access. The subtle difference between **Screen** and **Module** is that the screen is the visual component of the exact module on the server. Note that a module may provide features across multiple screens. Anytime the documentation refers to navigating to a **screen** or **module** refer to the navigation panel and click the screens' respective name. You will

see it highlighted in blue indicating which **screen** you are currently in.

Screen Content Area

image.png

The red box panel on the right is the **Screen Content Area** which is a **Tab Panel**. The title of the **Screen** will be in the tab name.

Screens

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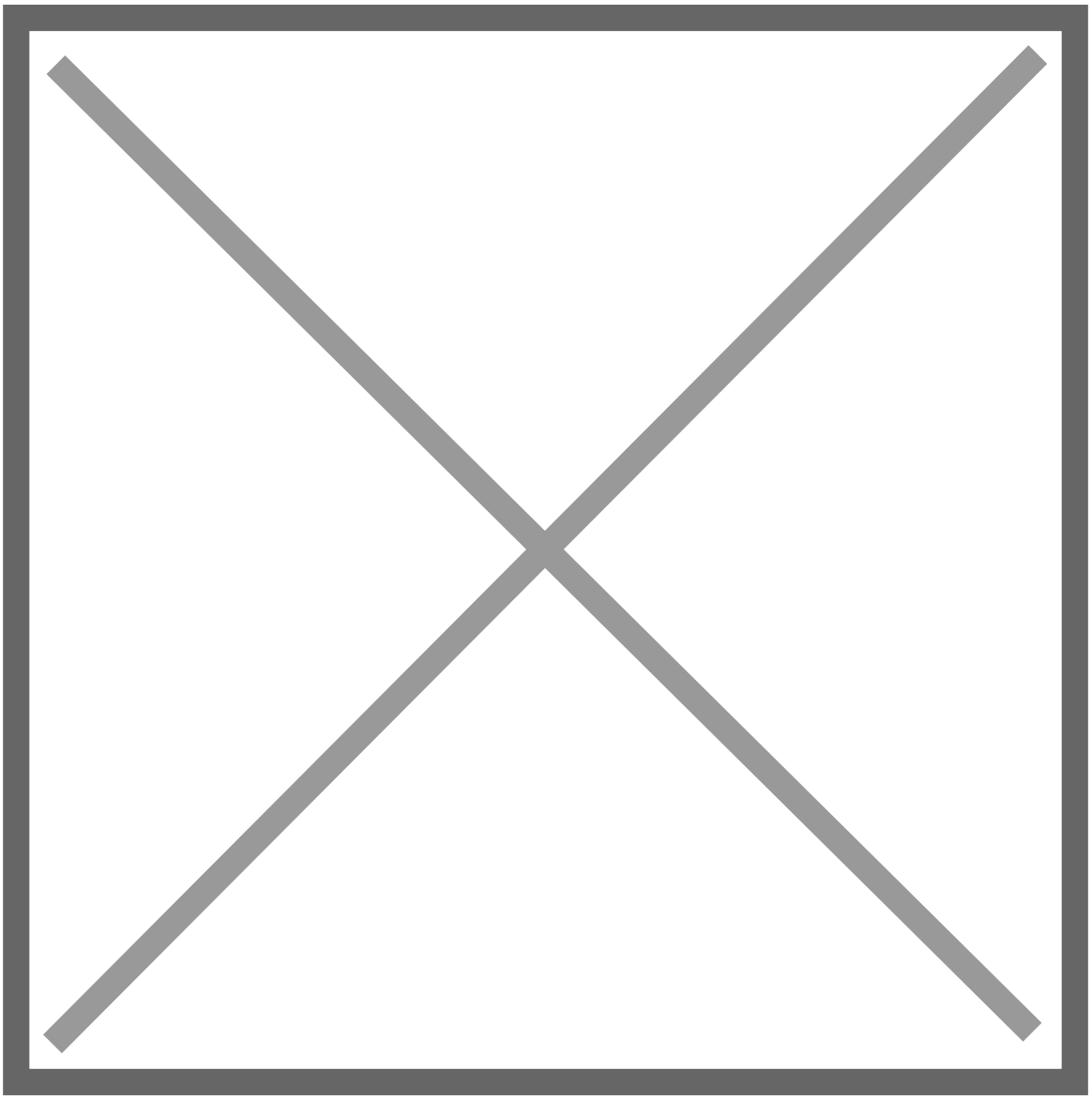
In this example, we have selected the **Users Screen**. Notice that **Users** is highlighted within the **Navigation Panel.** The **Screen Content Area** now contains the specific **Panels** for the screen. In this case, the four smaller **Panels** are all **Grid Panels**.

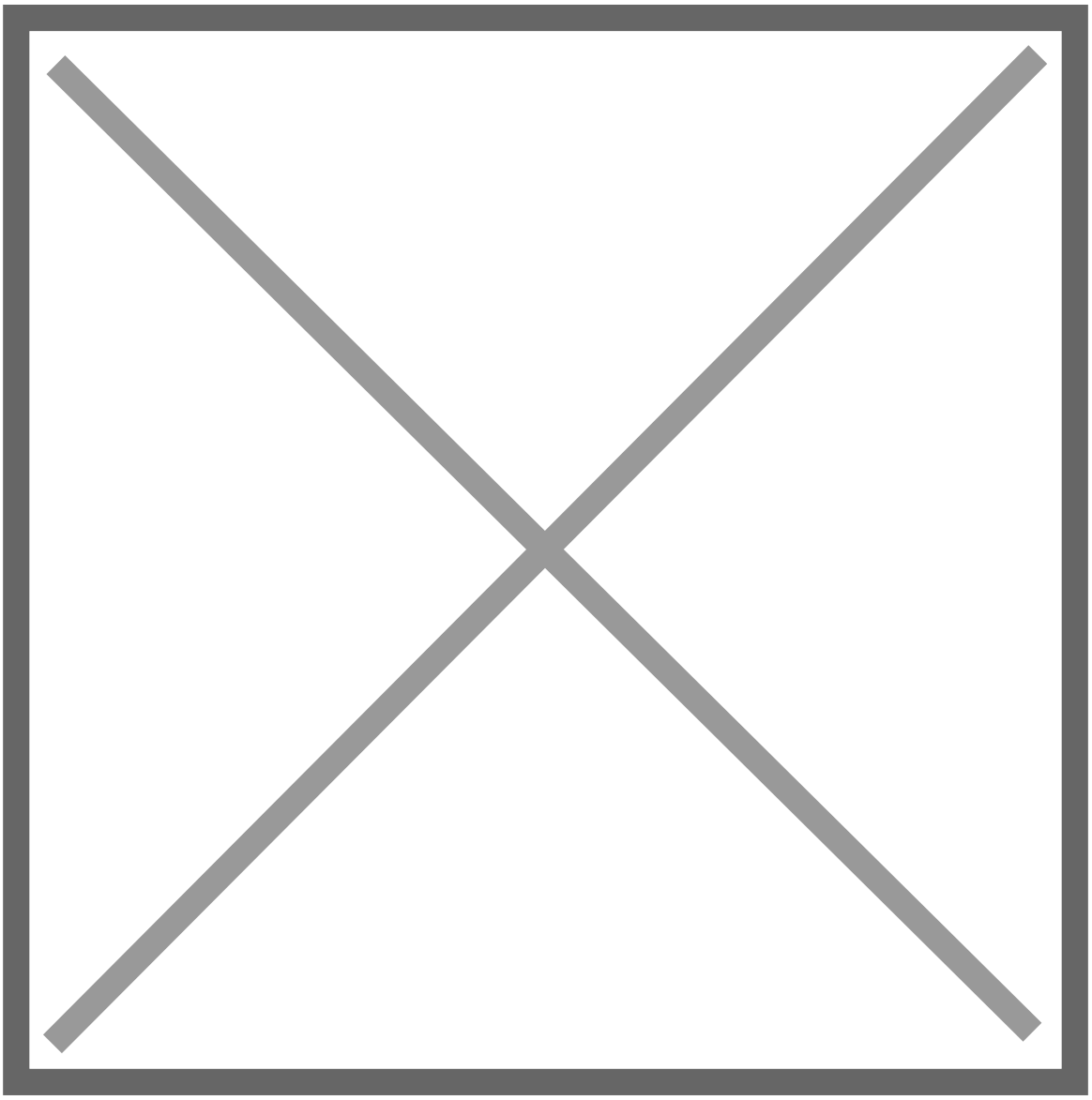
Panel Sizer Bar

image.png

image.png

You have the option to resize individual panels within each screen. To do this simply click on the in-between space between panels and drag in the direction to want to resize. Afterwards the panel will be extended right, the opposite works when trying to resize panels to a smaller amount. You can also do this to the height of panels as well.





Panel Tools



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Currently, there are not very many **Panel Tools** implemented, but an example of a **Panel Tool** is the option to collapse or expand panels, to provide a better view of other **Panels.** See the example above.

Group Selection

image.png

When using some screens such as **DayNight Schedule** or even Voicemail it is important to note that you have chosen the correct group to modify. This can be done with the **Select XXXX (***XXXX* will depend on the exact screen you are in) function which is located at the top left-hand of the screen.

If you are selecting this screen for the first time since logging in, you will also see a brief message such as the one below indicating that it has auto-selected the 1st group that would be included in the drop-down menu for **Select XXXX.** This is simply to bring attention to the fact that you may have to change the group to modify the one in question.

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Grid Components

Overview

Grids contain the components within the web portal necessary for modifying existing or new data, as well as more specific functionality of the individual screens within the web portal. It is important that the exact setup will vary screen by screen, but are still covered in this documentation's respective screen pages.

- Panel Tools
- Refresh
- Export to Excel or PDF
- Module Specific Buttons
- Page Options
- Scroll Bar
- Additional Columns
- Filter Function

Panel Tools

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Grids are the main workhorse of the system. This is where you insert, update, and delete Records using **(1) Row Editor**. Grids allow you to sort and filter using the **(2) Column Header Menu** and page through lots of data using the **(3) Paging Toolbar**. Most grids have **(4) Grid Toolbar Buttons** to perform module commands. Not all columns are sortable or filterable. Some columns have icons which are called **(4) Action Columns** and have the ability to delete records, or shortcuts to quickly go to an associated screen. These are outlined and numbered in the screenshot below:

Refresh

image.png

The **Refresh** button comes in handy to load the newest data from the server. For example, a good usage is if someone else modified data on the same screen or to view the latest historical data in

Call Logs.

Top bar	The account management bar along the top of the window is used to change your password or logout.
Left panel	The navigation panel at the left of the screen is for navigating to different screens within the web portal.
Right panel	The content area, filling the majority of the window, will display information and tools based on the selected screen.

image.png

Export to Excel or PDF

image.png

Almost all modules have the option to export the data shown to a table in **PDF** file format, or an **Excel** spreadsheet. Either click on **Export to PDF** or **Export to Excel** and it will start the download process. Depending on the browser settings, there may be a prompt to choose a location or it may download to a default destination such as the "downloads" folder. Consult the browser's documentation for more information.

Examples of data exports: **PDF** or **Excel Spreadsheet**.

Module Specific Buttons

image.png

Almost all modules have **buttons** that are specific to their function. Such as the example below; the **New User** button is specific to the Users module.

Page Options

When dealing with large quantities of data, the platform automatically splits the entries into pages that can easily be navigated from the toolbar. In this example below, the page is on page 1 of the 4 possible pages available.

image.png

To move forward one page click the arrow to the right (If you hover over it, a tool-tip will pop up stating "Next Page.")

image.png

You can also skip to the last page by clicking the arrow to the right of the first arrow.

image.png

You can also move from page to page by simply typing the desired page number into the page indicator.

image.png

Similar to moving forward one page and moving to the last page, you can conversely move back one page, or move to the first page.

image.png

Scroll Bar

In some cases, it is necessary to use the scroll bar on the bottom of the page to navigate to the left or right to access certain settings within the **Grids**. Click and drag the bar to the left or right until you find the settings you wish to modify.

image.png

Additional Columns

Depending on the logged-in user's permissions or system settings, some columns may be hidden within the screen. Feel free to explore and view the hidden columns, the data there is generally not as important as the visible columns. To view additional columns, click on the column header menu and click the **Columns** item. The columns that are already in view are checked while the ones that are currently hidden are unchecked. Any column can be toggled, these changes only last during the session, once you login again, the default columns will be displayed. Please note that certain columns are required when inserting new records, and if those columns are hidden, a new record cannot be created.

image.png

Filter Function

Filters are a powerful method of sorting through a lot of data. Not every screen has lots of data, but on screens that do filtering is extremely useful. You can apply filters to multiple columns at once. Start by accessing the column header menu and click the **Filters** item. A pop-up will appear with a small pair of binoculars. Type your filter. Keep in mind that each **filter** is applied to each item individually. As you type, the grid will start to populate with data that the filter has found.



image.png

When finished, press enter or click out of the **filter** box.

image.png

By typing "jam", the server finds the **User** named *James.* Columns that have an active **filter** on them will always be ***bold and italicized*** as shown below.

image.png

To deactivate the filter, click the column's header menu and then click the checkbox next to the filter option. Another option is to delete the text in the filter box. After you have done this, any filtered-out data will reappear:

image.png

Not all columns are text forms, some give the option such as yes or no as checkboxes:

image.png

After checking *yes* for the filter column option, the grid will show all the rows where *yes* has been selected. The column's name becomes bold and italicized to indicate that a filter is active.

image.png