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

image.png

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.

image.png

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

image.png

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

image.png

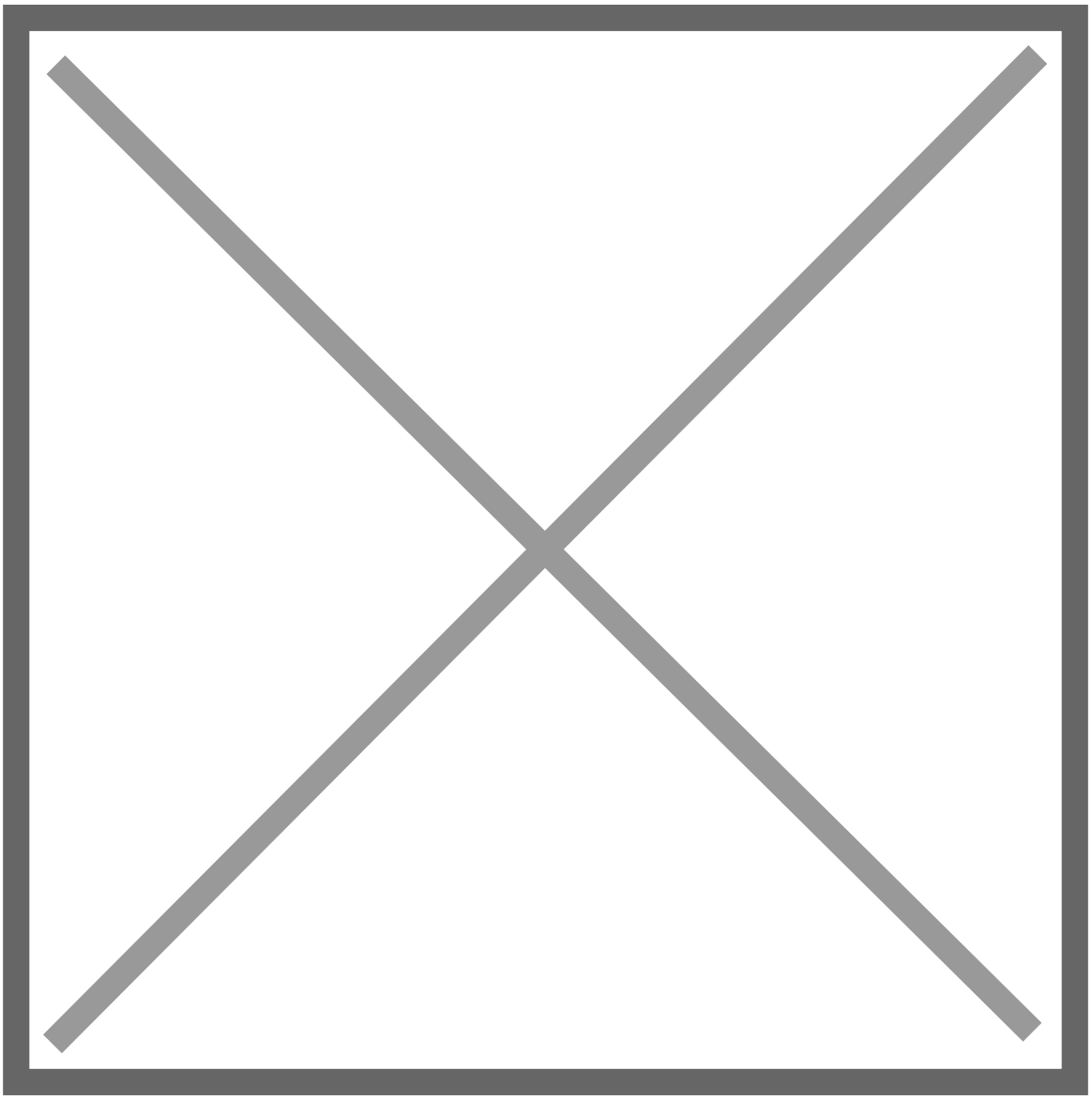
In this example, we have selected the **Users Screen**. Notice that **Users** is highlighted within the **Navigation Panel.** The **Screen Content Area** now contains the specific **Panels** for the screen. In this case, the four smaller **Panels** are all **Grid Panels**.

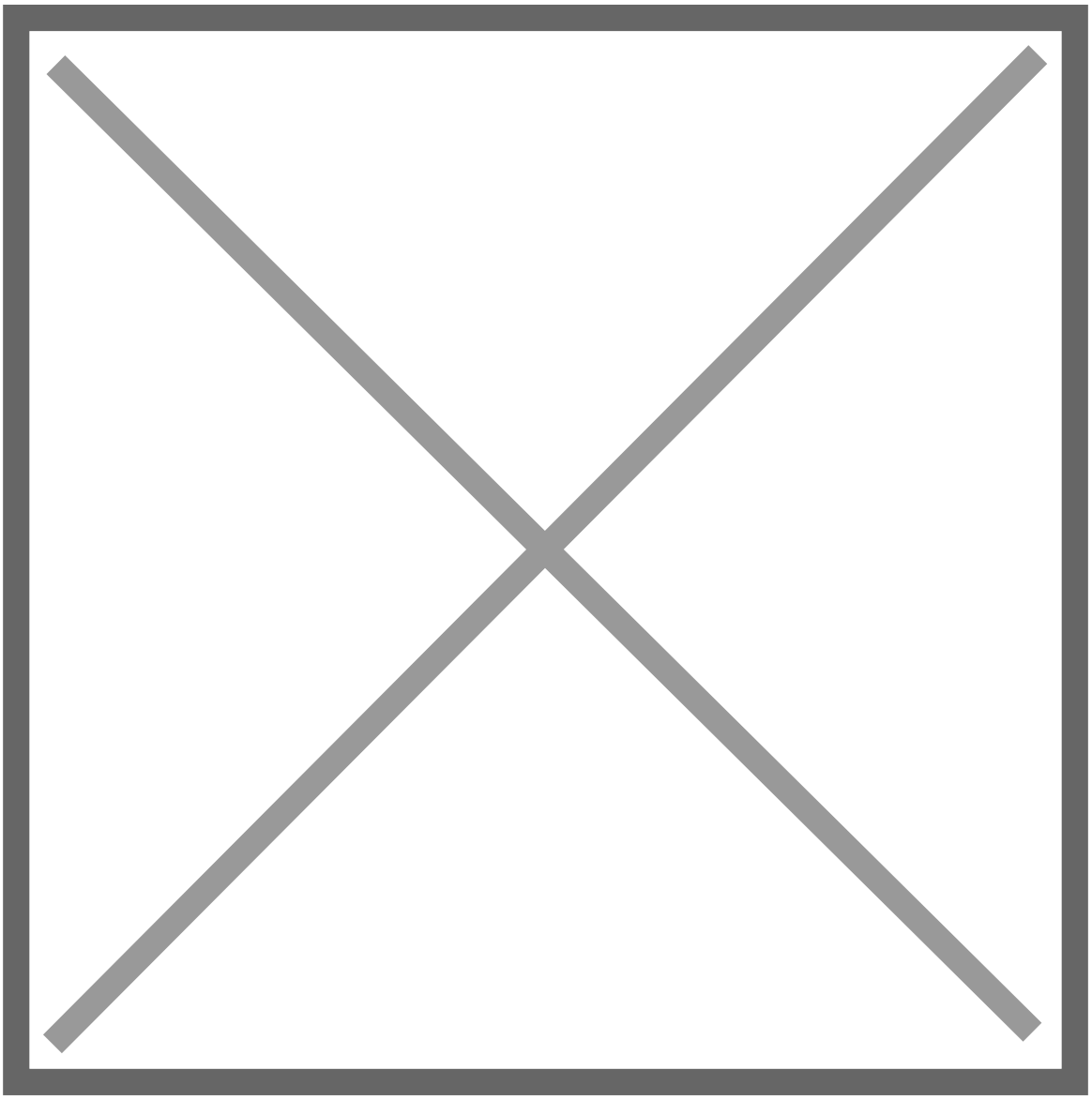
Panel Sizer Bar

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



image.png

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.

image.png

Revision #11
Created 2024-03-22 20:39:19 UTC by Mark Murawski
Updated 2024-08-23 12:40:54 UTC by Andrew Baumes