Users

The **Users** screen is for managing people who will have access to the IntellaSoft Web Portal to make changes to the phone system, delegate permissions, or other functions such as accessing call logs and voicemail. When a new user account is added, by default that user will be able to log in and see their own voicemail. It is up to the manager who is creating the account to check / un-check the specific permissions for what screens that user should have access to. A very important aspect is the delegation of what users a user can control via the **Permission Mode** setting with **Include** or **Exclude** mode (more on this below).

- Adding a New User
- Removing a User
- Including/Excluding Users
- Including/Excluding Phone Numbers

Video Tutorial -- Please watch Full Screen

Adding a New User

1) Navigate to the **Users** screen

2) Click the **New User** button.

3) The following fields are required when creating a new **User**.

Field	Type	Description
User	Text	This will be the username for logging into the portal.
Password	Text	For logging into the web portal
Department	List	Select a department the user will be in

Field	Type	Description
Permission Mode	List	Either exclude or include as described below

image.png

4) Fill in **User**, **Password**, and **Department**.

5) Then set **Permission Mode** to *Include or Exclude.* (Explained below)image.png

Permission Mode Include: By default, the user will not have access to any other users. Allowed users will be determined by which ones are **Included.**

For example, use this mode when setting up a manager of a small department. The manager may need access to users Abby, Bob, and Chris. These users would be added as **Included Users**

Permission Mode Exclude: By default, the user will automatically have access to **ALL USERS** . Hidden users will be determined by which ones are **Excluded.**

For example, use this mode when setting up an admin that needs access to the entire system except for the calls and voicemails of the President and Vice President. The President and Vice President would then be added as Excluded Use

6) After selecting the permission mode, select the appropriate **Permissions** the user will have access to. You will need to use the scroll bar located at the bottom of the users table to view additional permissions. Permissions are on a Per-Screen basis.

For example, if a supervisor account was needed that could only view the call history of the system in **Call Logs.**

- Make sure that the 'Admin' permission is unchecked
- Make sure that ALL other permissions are unchecked
- Make sure that 'Call Logs' is checked

This user will now only have access to view the **Call Logs** screen.

image.png

7) After you have confirmed that all the options for the new user are correct, save by clicking on **Save New User**, or cancel if applicable. Afterwards, a green message will appear stating **Changes Saved.**

image.png

Removing a User

1) Navigate to the **Users screen** from the **Navigation Panel.**

2) From the **Users** tab, select the correct **User** you wish to delete. The user you selected will be highlighted in blue, as shown below.

image.png

3) Use the navigation bar on the bottom of the page to navigate to the far right, until you see the column of red X's under **Delete**. Click the X that corresponds with the **User** you want to delete.

image.png

4) A confirmation pop-up will appear confirming your selection. If you wish to delete, click **OK.** You will see a message stating **Changes Saved.** If this is not the entry you wish to delete click **Cancel**.

Including/Excluding Users

For this example, we will use a **User** that has their permission mode to *Include.* This means that by default, the **User** will not have access to any other **Users** and you must manually include **Users.** (On the other hand, **Users** set with an *Exclude* permission mode will have access to all **Users** if no users are added to the exclude list.)

Select a **User** to start adding other users to their **Exclude or Include** list (permission dependent). The **User** you are currently adding **users** for will have its row highlighted like the example below.

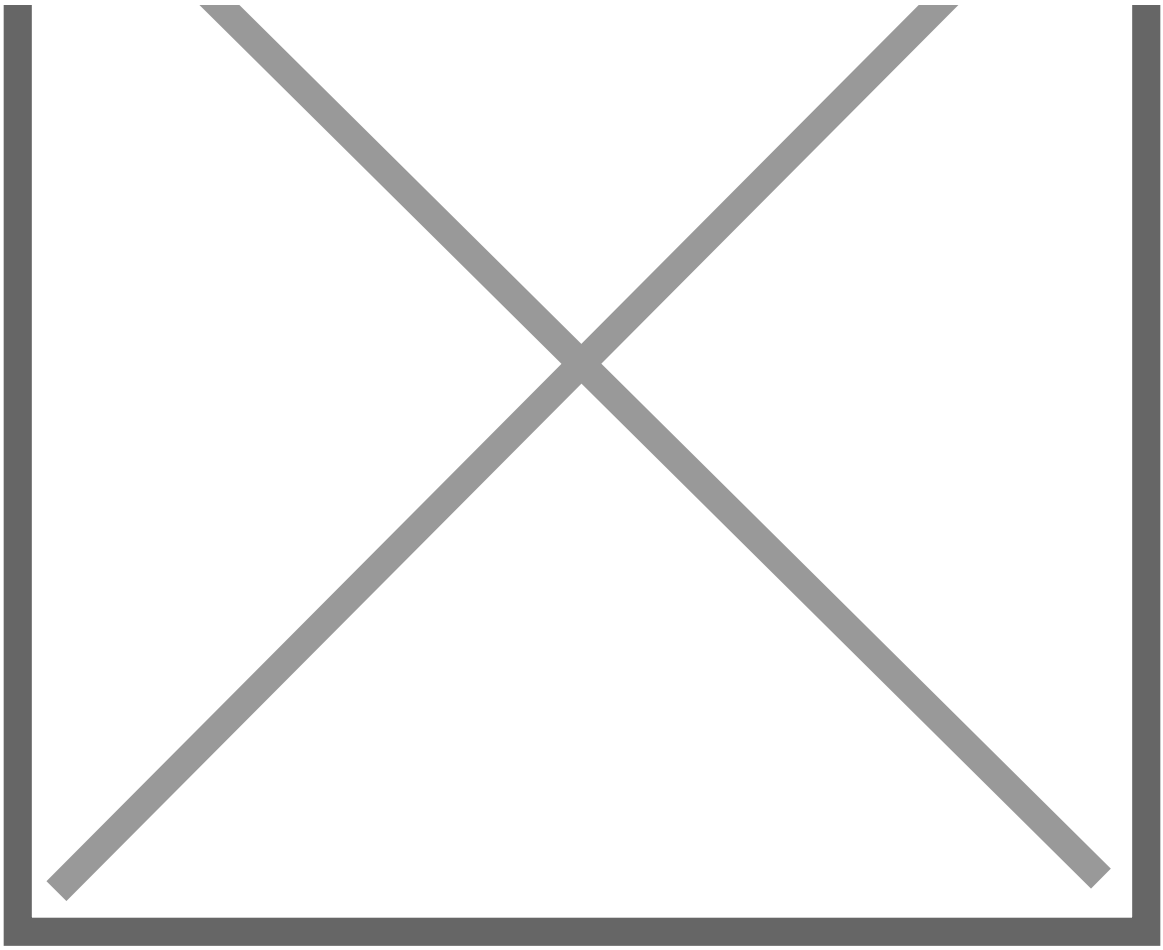


image.png

There are two endpoints before we add any **users.** In addition to the **Users** panel, there is also the **Include/Excluded Users panel** (see "1" below. Again this is dependent on what the **Permission Mode** mode for this particular user is set, if it's an **Exclude** the text would say **Excluded Users** as opposed to **Included Users**) which shows all the users that have been added to the **Included/Excluded User** list) and the **Available Users** (shown are all users that **can** be added to **Excluded/Included User** list). Again it's important to note that in this particular example, the **User** Tracy has a **Permission Mode** set to **Include**, so these available **users** are the ones she does **NOT** have access to.

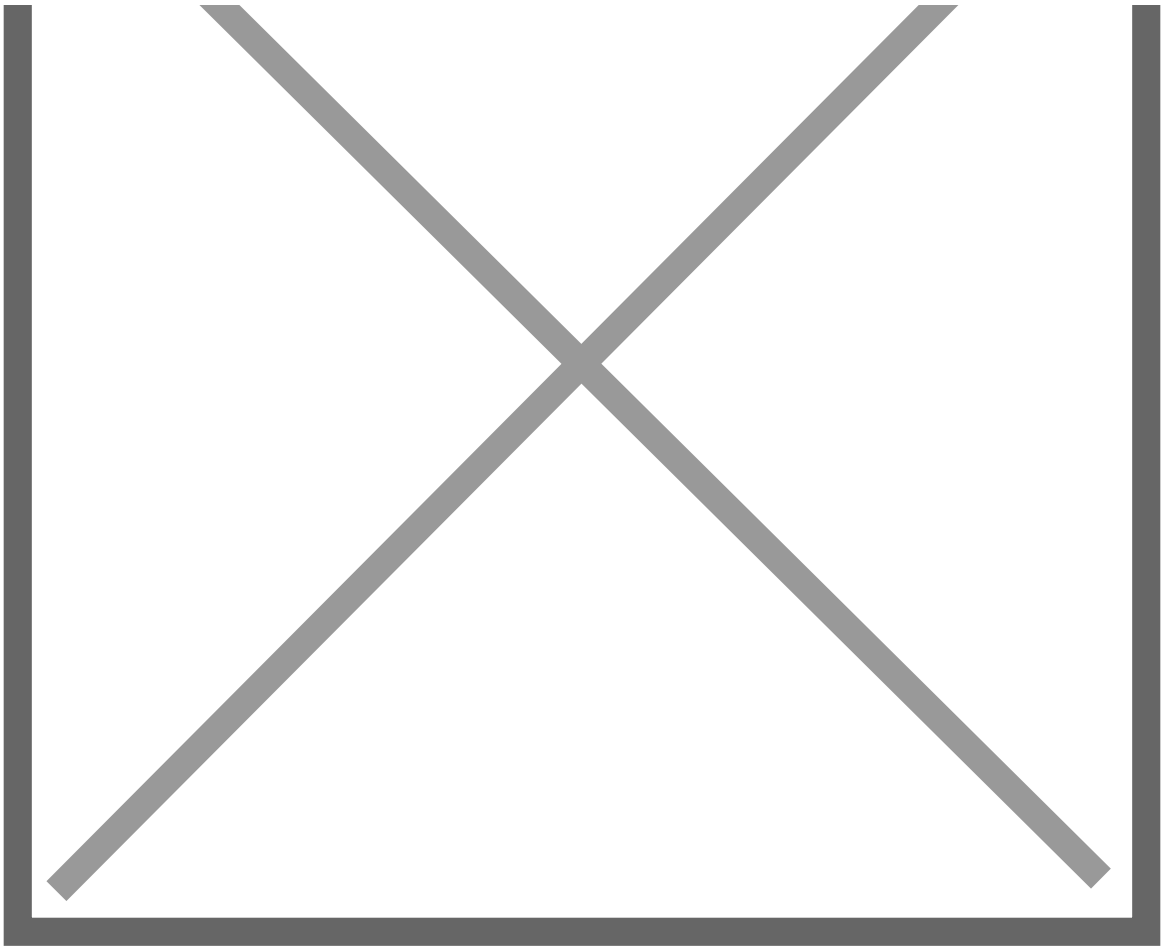


image.png

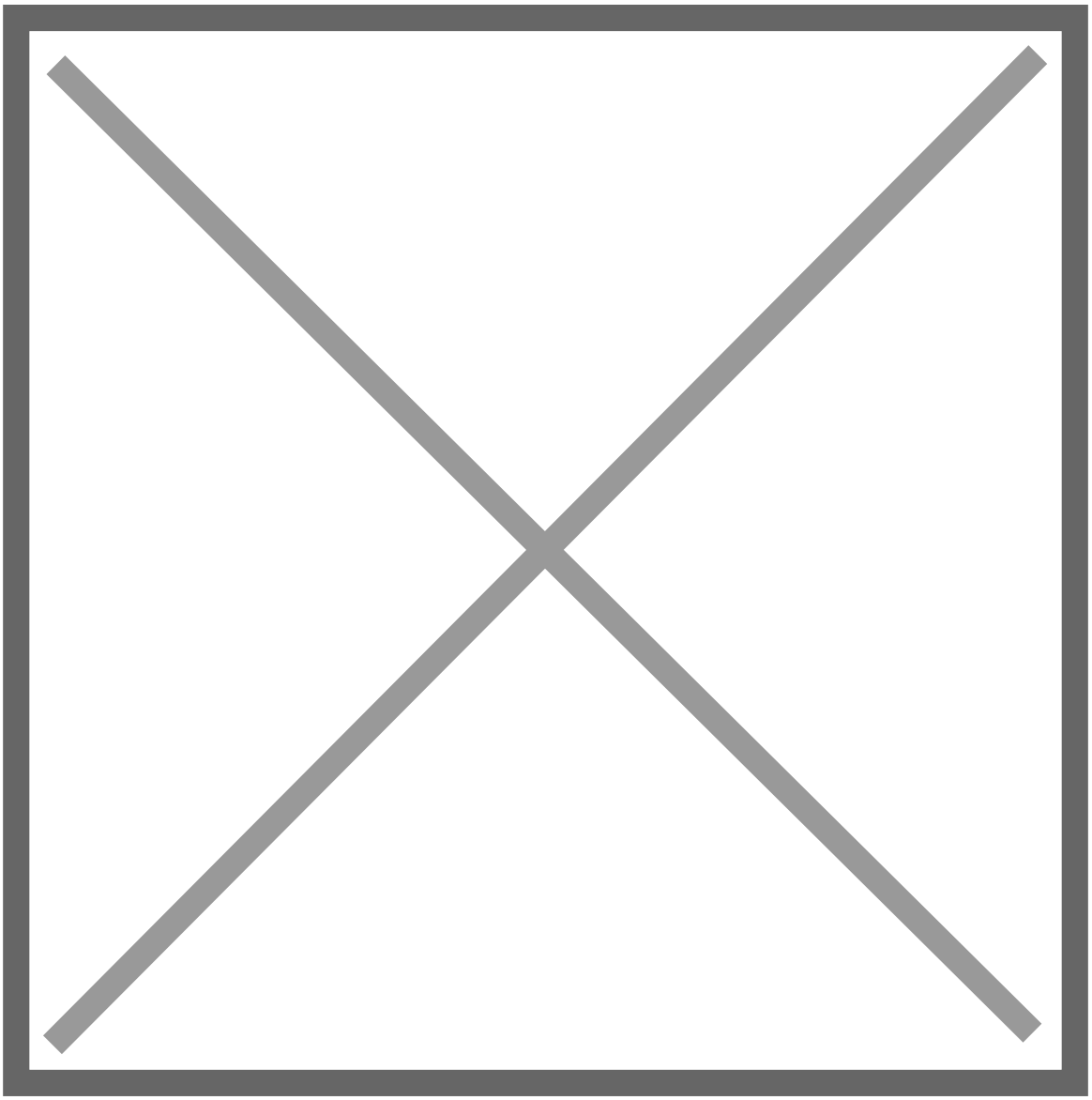
There are three options for adding users to list. You can select the **Include All Button** (**1**, adds all the available to **users** to the list), **Green Arrow** in the **Include Column** (**2**, adds each **User** to the list individually) or using the **Quick Department Include** (**3**, or **Exclude**, if applicable). For the purposes we are going to add **users** using the **Quick Department Include** function. To do this simply click on the drop down menu and a list of the available **Departments** will appear. This will add **Users** based on their department and who is available to add in the **Available Users** list.

image.png

image.png

As you can see by the example all **Users** in the Equipment department were added to the available user list. You can also go through and add **Users** individually too, or include them all if applicable.

image.png



Removing **Users** from an **Include/Exclude Users** list works in the opposite way of adding them to list from the **Available Users** list. You are able to remove them individually via the right pointing green arrow, remove all at once, or remove by department (the same way you can from the **Available User** list).

image.png

Including/Excluding Phone Numbers

You can also grant permissions to a **User** on a per-phone number basis, allowing them to see call records for users they are not otherwise allowed to modify.

1) Start by navigating to the **Users** module via the **Navigation Panel**. The **Phone Numbers** panel is the middle bottom panel within the **Users** screen. Select a **User** you wish to

include/exclude numbers from. Ensure the **User** you wish to edit is highlighted.

2) While in the **Phone Numbers** panel click the button labeled **New Phone Numbe**r, a row editor will appear in the grid below.

image.png

Enter a **permission type** from the drop-down based on the phone number you are going to **include** or **exclude** for this user. Afterwards, enter a phone number. This can range from an internal extension to an outside long-distance phone number. When you are satisfied click the **Save New Number** button, after you will see a message stating **Changes Saved.**

image.png

If you need to remove a member, locate the **Phone Numbers** panel after you've selected the **User** you wish to modify, and click the **red X** in the **Delete** column**.** A confirmation pop-up will appear confirming your selection. If you wish to delete, click **OK.** You will see a message stating **Changes Saved.** If this is not the entry to wish to delete, click **Cancel**.

image.png

Revision #12
Created 2024-03-25 13:08:53 UTC
Updated 2024-09-02 19:17:45 UTC by Andrew Baumes