## Prism Home Page

Overview

Prism's home page displays links to the sections that the user's role gives them access to. Each of the smaller tiles gives direct access to an element of system configuration, while the larger tiles are for analysis plug ins (e.g. Telephony) and show links to the different analysis tools available in each module.

Where it is used the My Activity tile shows on the home page as well, giving direct links to the user's phone book and call activity.

The Prism Home Page can always be reached by clicking on the logo in the top left corner of the screen.
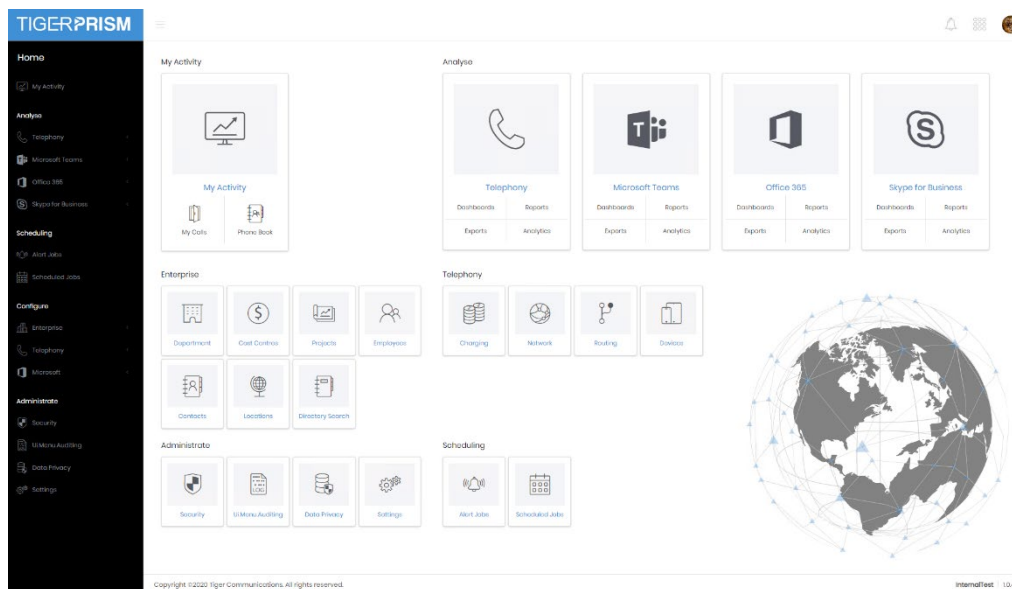
Common Features

Throughout Prism there are areas where the same controls will show. These controls have been streamlined and made consistent throughout the product.
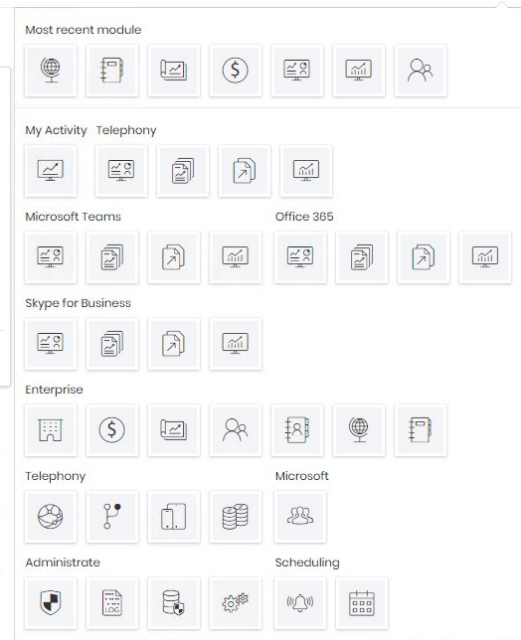
Navigation

Navigation around Prism is done simply by clicking the object or module that you want to see. As this is a browser-based product you can have multiple pages open and using "open in new tab" or "open in new window" options can save considerable time.

Clicking on the Logo in the top left-hand corner will take you back to the Prism Home Page menu.

Clicking on items in the left-hand menu will either open/close a submenu or take you to a module.

Clicking on your avatar picture in the top right corner will display your settings menu.

Clicking on the menu icon ⣿ shows direct access links to the areas the user has available. It also shows recently accessed modules.

If an expected link is not navigating as expected an object or setting may be in edit mode on the main screen. Just save or cancel as appropriate and continue.

My Settings

The avatar picture in the top right of the screen will always show you your own personal settings. It has quick options to change the font size of the display and to log out but can also take you into your profile screen.

Choosing My Profile takes you into your Account details page. This has four tabs of information, although there is relatively little that can be edited at User level, and Directory Integration may reset certain things (eg names and titles). It does however let you see your settings and on the fourth tab (Preferences) you can adjust the font size, colour theme, time zone and language.
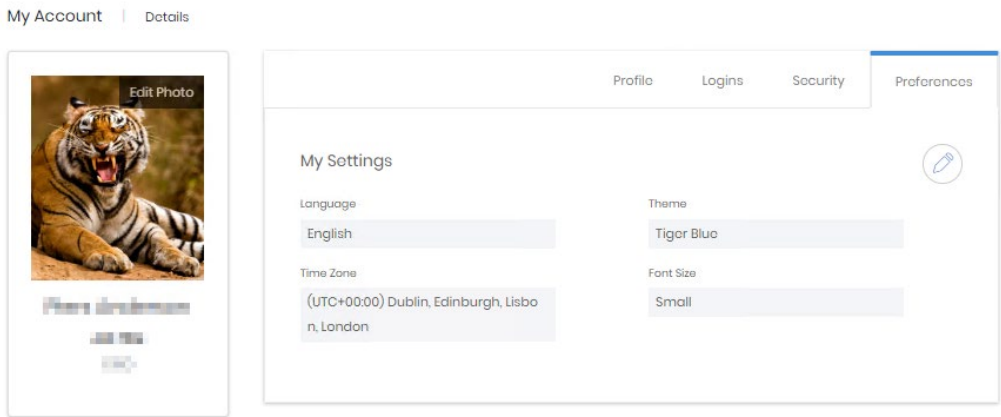
Grid columns and controls
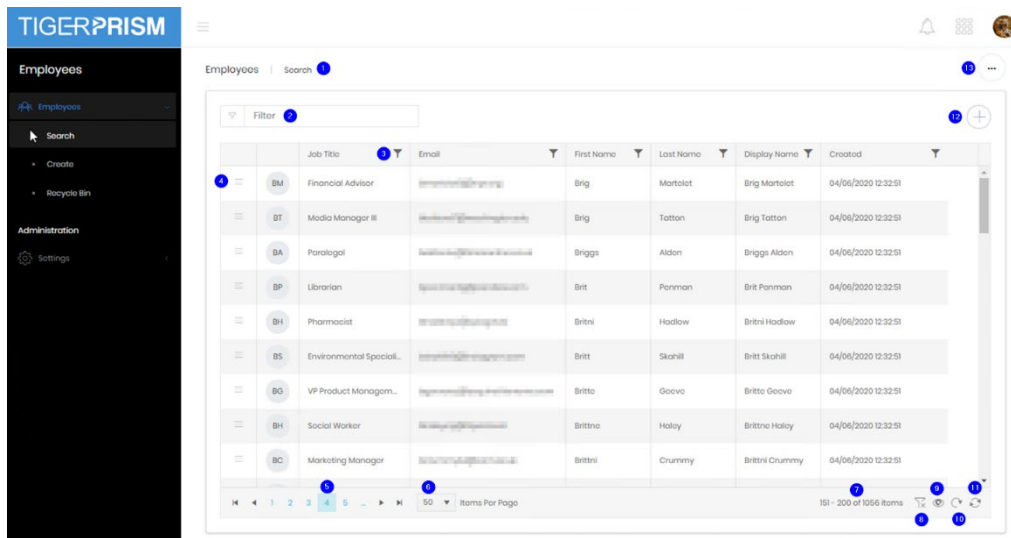
There is a filter at the top of the page (2) which will return any records containing the entered string in any field. Each column also has an individual filter (3) which can be used to display selected sets of records. At the left of each line the detail icon (4) will display the full record.

Along the bottom of the grid are the page controls (5), and the number of records per page control (6). Toward the right are the total records filtered (7), reset filters (8), choose display columns (9), reset columns (10), refresh display (11) controls. At the top of the page are buttons to add a new record (12) and to export the current grid (13). The grid can be exported into Excel (XLSX) or text (CSV) formats.

Recycle Bin

Most objects in Prism are never destroyed but are deleted into a recycle bin specific to that object. The recycle bin looks very similar to the search grid and has the same controls for display and filtering. There is also an extra control on the right of every row which allows the record to be restored.
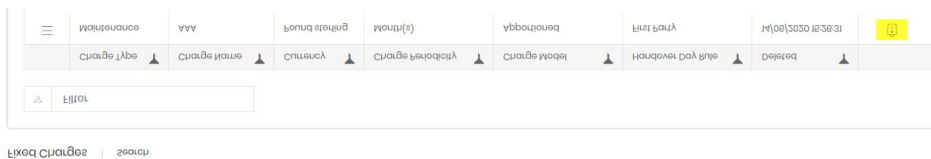
Filtering

At the top of most grids is a filter box. This is a generic filter which will narrow down all rows in the table to include only those with exact matches (in any displayed field) to the string typed into the box.

Further to this option, each column has a filter icon at the top. This allows a more targeted level of filtering as the options are more varied and contextually sensitive to the type of data in the column.

Text fields might offer "Begins with …" or "Contains …",

number fields offer options including "Greater than …" or "Less than …",

date fields offer "Is Before …" and "Between …"

some fields will simply offer picklists

You can filter on as many columns as you like to narrow down exactly the record set you need. That can then be used or exported for use elsewhere.

Edit Screen Controls

Many edit screens have custom controls, and these will be detailed in their specific sections. There are three common controls seen on many edit screens.

Save changes (1) – submit changes and return to the original page

Reset changes (2) – discard any changes but stay in edit mode

Cancel (3) – discard any changes and return to the original page

Assignments and Overlaps
Overview

There are several areas within Prism which have one object or property assigned to another for a specific time period using 'from' and 'to' dates.

Often, but not always, these are set at item creation time but generally these assignments can be edited afterwards. Assignments can be adjusted to correct the historical track to reflect the actual times of change (directory changes are often advised after the fact), additional assignments can be made as changes take place (a new fixed charge is applied when a service is ordered by a department) and assignments can be planned for the future (a tariff with new rates comes into force on the first of the next month).

Controls and Editing Assignments

These assignment screens all have the same controls. The existing assignment history is viewed until the edit button is clicked. At that point several fields and controls become available and rules specific to the records are highlighted above the table.

In the example below, the top line has been edited to close a gap in assignment dates. The status and corner flash indicate which rows have been altered and how.

The 'From' and 'To' dates (1) for all rows, as well as the selections (2) can be changed. An entire row can be removed (3) as well, if the record is no longer required, or was incorrect. Once all details are correct the assignments can be saved.

It is important to ensure that there is no overlap in the dates. To help with this, Prism will flag up any overlapping date ranges and will not allow the edit to be saved until they are resolved.

New Assignments

A new assignment can be added by clicking the Add button. The 'From' date will need to be supplied, as well as any selections (endpoint, tariff, employee) required by the context. The 'To' date of a new assignment will always default to Ongoing and should be adjusted as well if that is not correct.

In the example below a new endpoint has been assigned, however the 'To' date for the old assignment has been left as Ongoing. Prism shows which row in the table conflicts with each one to assist in finding where a correction needs to be made. These are referred to as Overlaps and all must be resolved before the changes can be saved.