



Automate Admin Portal Evolution

VOSS Automate



Copyright 2023

Background



This enhancement delivers a significant improvement to the Admin Portal user experience, based on customer feedback:

- We have expanded the new Portal framework that was initially used for the Business Admin Portal, and extended the simpler user experience and easier on-boarding to the Admin Portal.
- Automate 21.4 consolidates the ease-of-use and graphical features of the Business Admin Portal into the new Admin Portal, introducing an enhanced look and feel, simpler theme management, significant search improvements, which includes guided search and list view search that makes it easier to find entities and take actions.
- The key capabilities of the Business Admin Portal are now combined with the flexibility and functionality of the Admin Portal to deliver operational efficiency and an improved user experience for admin users, with little to no transition impact.
- A single interface for all users means no longer jumping between interfaces, and dealing with scope limitations.

Key benefits to making the transition



- A streamlined experience for high volume, day-2 features, familiar to users of the Business Admin Portal.
- Significant search improvements (now out of Beta) delivers major operational efficiencies for admin users. A new “What would you like to do?” search function allows you to easily find what you're looking for. Guided search options makes it easier to find actions and entities and to execute actions without having to memorize a menu structure.
- More intuitive navigation and path to most common tasks.
- Reduced learning curve for new admins, and devolved administration.
- Greater flexibility for system admin users to create tailored user experiences that maximize simplicity without limiting scope, especially for those currently using the Business Admin Portal.
- Admin users no longer need to jump between two interfaces, depending on the view they want, either Business Admin Portal or Admin Portal. One login now provides access to all functionality.

Improvements



Enhancements for admins using the new Admin Portal (as it ships)



- New navigation/search options ("What would you like to do?", quick search)
- Saved search options for any applied filters on list views – shows on landing page for quick access, allowing users to create and access common searches
- List view enhancements (previously available only to Business Admin Portal users):
 - Filters can be applied inline on columns (contains search) – quicker/easier filtering
 - Pop-up filter still possible for more specific searching
 - User can choose to show/hide some list view fields, as needed
- Card layout on forms and on tabs (configured by the admin in field display policies)



Enhancements for admins using feature dashboards (Business Admin Portal):

- Feature dashboards (visual view of feature area) – key tasks, basic analytics in one place
- Feature details pages – improved visual layout, key tasks, links to related elements/details
- Improved cross links between services for quick access to more details
- Form panel layout (vs tabs) – improved view and access to data/settings on form
- Additional simple MACDs tied into quick actions

Enhancements for system admins configuring user experiences in the new Admin portal:



- Greater flexibility in defining menus/landing pages
 - Landing pages support all Business Admin Portal-style cards (counters) and charts – allowing creation of, for example, summary counts, as needed
- Field display policies for forms - choose to use tabs or panels for separating groups of fields
 - Panels were the default in Business Admin Portal, while tabs were the default in classic Admin
 - Choose the option that best fits your preference or form setup
- Menu layouts – entries can be used to navigate to a landing page from any level of the menu
 - Mimics the dashboard style approach used in Business Admin Portal
 - Business Admin Portal dashboards are replicated as landing pages in Admin Portal GUI – counters, quick actions, links, etc.
- Branding/Theme – configuration via the Admin Portal for many elements (for example, logos and colours) – includes functionality such as a preview option. This feature should remove the need for LESS/CSS file, in most cases

Recommended interface and login



In Automate 21.4, you will use the following recommended interface:

- **`https://<HOST>/portal`** OR **`https://<HOST>/portal-classic`**
- Default interface configurable via CLI when someone uses base URL **`https://<HOST>`**
- **`/business-admin`** and **`/admin`** will remain valid, but will redirect to the base URL (default interface)
- Check SSO URLs (if using SSO) to ensure users get to the correct interface

Impact of the transition for existing Admin Portal users



- Overall GUI structure/navigation the same (such as menus and field display policies) – existing Business Admin Portal, see next slide
- Some enhancements will be available without any changes to setup (see next slide)
- Configuration choice – range of dashboards and simpler interfaces are available (brought over from Business Admin Portal) - dashboards, cards, quick actions along with other admin capabilities (examples are available post upgrade, or can be reviewed prior to upgrade, for planning purposes)

We recommend taking advantage of the new capabilities to improve the user operational experience. A little education and handover will result in a significantly improved user experience.

VOSS can help advise on menu/landing page setups to achieve your goals.

Impact of the transition for existing Business Admin Portal users



- Business Admin Portal profiles are no longer used to configure features users have access to. Instead, use the usual RBAC controls, such as menu layouts, landing pages, and access profiles. There are two ways a Business Admin Portal profile can be associated with a user:
 - Direct association via the user's Role (custom interface setting)
 - Lookup (up the hierarchy from the user) of a Business Admin Portal profile named "default"
- Example menu/landing page and access profile setups for replicating the Business Admin Portal
- Complete flexibility on, for example, menus, means you're no longer restricted to fixed menu items and customer actions, etc. Including field display policies/configuration templates for actions (wasn't supported for quick actions)
- Ability to create the desired menu setup and expose additional items, as required, including the "custom actions" you may have previously added through the Business Admin Portal profile.
- Use new URLs, but */business-admin* URL will redirect to Admin Portal interface.

Again, VOSS can advise as needed to help transition. The recommendation is to test and validate in a lab first. If you don't have a lab available, we can help review via other options, such as cloud platform.

Recommended approach



Approach/best practices for transitioning:

- New Admin Portal, recommended interface
- Review menu/landing setups:
 - Utilize Business Admin Portal-style dashboards and quick actions, charts, etc.
 - Create new feature dashboards that might make sense in your implementation.
 - Other features can be linked in that are not part of dashboards today.
 - Review names and descriptions for “What would you like to do?” search ease
- Review search functionality and have admins utilize to improve navigation/speed
 - “What would you like to do?” – go to feature (e.g Subscribers) – no clicking through menus
 - Search - find service instance (e.g Subscriber) and immediately take action – no navigational hops – find menu/feature area, get list of subscribers, filter, etc.
- VOSS provides example setups as part of the product and can engage and help evolve

New Feature Details



What would you like to do?



VOSS (Provider) navigation bar. The search icon is circled in red. The bar includes a home icon, a search input field with the placeholder text "What would you like to do?", and several utility icons on the right.

Home / Search Results

Rows: 6 Search Term: hunt

Name	Path	Description
Add New Hunt Group	Landing Page: Manage Number Groups	
CUCM HuntList	Overbuild > Device Models	
CUCM HuntPilot	Overbuild > Device Models	
Hunt Groups	Cisco Subscriber Management	
Hunt Groups	Avaya Management	
List All Hunt Groups	Landing Page: Manage Number Groups	

- Appears on top of home landing page, also via compass icon top right (red circle)
- Searches the menu, landing pages, & their descriptions for matches
- Easy way to navigate/find actions without memorizing the menu structure/nesting
- Results are based on menu, so utilize the FDP, CFT, filtering rules, etc – same as using menu
- Especially useful when menus include a lot of items
- Best practice – ensure menus, landing pages, descriptions have useful text for finding actions

Advanced Search – Quick Search



Please select a search mode and enter a search phrase

Quick Search Global Search

Phone

- Phone Configuration Mapping
- Phone Numbers
- Phone Sites
- Phone User
- Phones

Please select a search mode and enter a search phrase

Quick Search Global Search

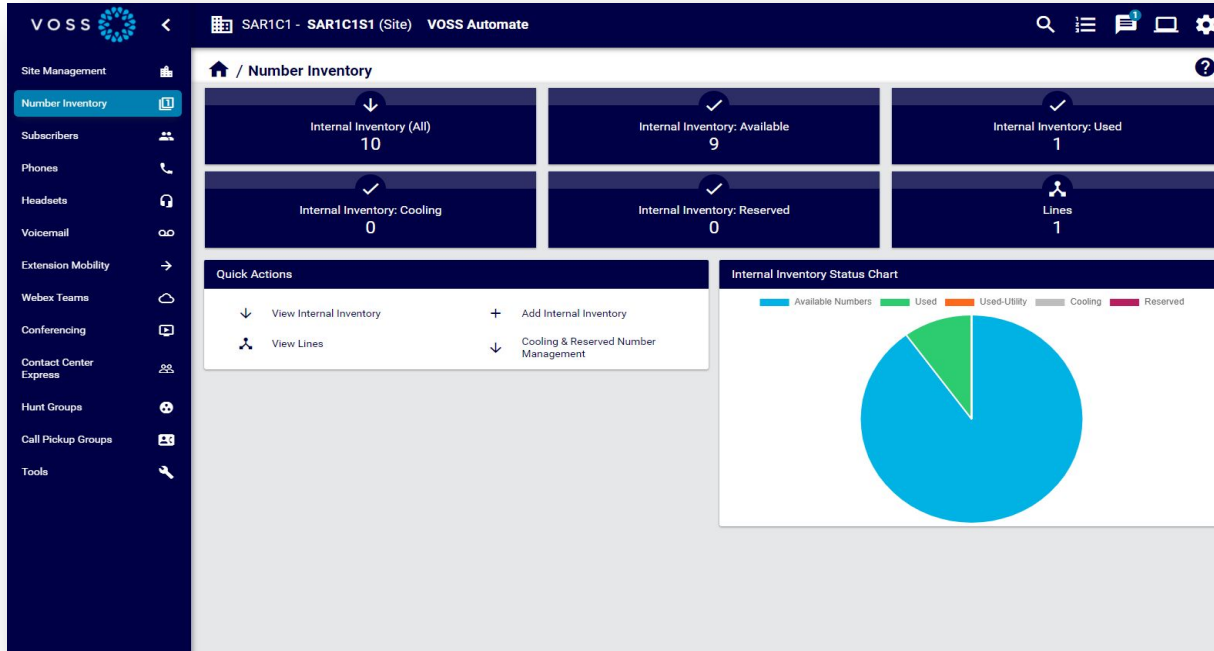
Searching for: Phones

Select Field	Select Condition	Enter Search Value
Device Name	Contains	Search value
Description	Equals	<input checked="" type="checkbox"/> Ignore Case?
Product	Does Not Equal	
Owner User ID	Starts with	
Phone Button Template	Ends with	
Softkey Template	Does Not Contain	
Device Pool Name	Greater Than	

Cancel Search

- Quick Search – ability to select an entity and enter filter criteria
 - User’s menu used to determine objects to present - based on access
 - Offers fields and filter options to build up a query (can include multiple criteria)
 - Submit -> navigates to list view for the menu/landing item and applies the filter
 - Quick way to search/filter from anywhere without navigating to appropriate page first
 - Functionality based on search in BAP, enhanced to include full menu scope (instead of hardcoded)
- Global Search - for broad/general search as before (can be hidden)

Dashboards and Cards



- Visual landing page for a feature area (counters, charts, etc) and relevant links
- Counters, charts and links are all configurable – all defined in landing page definition
- Great for consolidation of feature areas rather than a collection of separate menu links
- Numerous out-of-the-box instances created – replicates BAP dashboards

Dashboards and Cards



Home / Number Inventory / Internal Number Inventory / \+12145553001

Number Details

Internal Number *	\+12145553001
Status *	Used
Vendor	
Usage	Device
E164Number	
Release Date	
Internal Number Type	<input type="text"/> ▼ 🔍
Tag	<input type="text"/>
Description	<input type="text"/>
Reservation notes	<input type="text"/>
Extra1	SBC-West

Usage

Line (Partition)	DemoCiscoCustomer-INTERNAL-PT, San Jose (Site) 🔗
Phone	BOTTFRANKLI (Cisco Dual Mode for Android) 🔗
Phone	CSFTFRANKLI (Cisco Unified Client Services Framework) 🔗
Phone	BAT169944152820 (Cisco 8851) 🔗
Remote Destination Profile (SNR)	tfranklin-RDP 🔗
User (Cisco Subscriber)	tfranklin 🔗

- Card (Panel) or tab option in FDP for field groups on any form – so advanced admin can decide on experience desired
- Cards - good to see more data on single screen rather than going tab to tab (easier to search a form also).
- Tabs still could be better for forms with lots of fields, certain data sets (e.g. auto attendant) 16