Using Inviscid TotalABA

This document explains how to navigate around the TotalABA application. After a few minutes, you should find it to be a quick and easy experience as everything looks and performs consistently throughout.

Setup
Make sure your browser allows popup windows for the salesforce.com URL. These are used throughout the TotalABA application.

Login
Go to http://www.totalaba.com or https://inviscid.cloudforce.com to login into the TotalABA application. You can use any web browser (e.g. IE, FireFox, Chrome) on any platform (e.g. Windows, Mac, iPad, etc).

Navigation – List Pages

A set of default tabs is displayed at the top of the application (item 1). Clicking on any of these tabs opens up the recently viewed items for that section, along with the option to utilize a view (see Navigation – View Pages). Other tabs that are not displayed at the top may be accessed by clicking on the **+** symbol at the far right of the tabs (item 2).   This also gives you the option to customize which tabs are displayed and how they are ordered (click on the **Customize My Tabs** button). For example, you may want to add Sessions to the displayed tabs.

The most recent items you have accessed will always be displayed on the left side of the application (item 3). Click any of the records to open them.

Once you click on a tab, the recent items you have viewed for that section are displayed. You can change this to recently created or recently modified by clicking on the drop down on the upper right of the list (item 4). You can create a new item for the section by clicking the New button above the list (item 5).

To access all records in a view for a given tab, select the desired view then click the **Go!** Button (item 6). Remember, when you first access a tab, only the recently viewed items are displayed.

TotalABA enables searching across all records in the application. Simply enter the search value then click the **Search** button at the top of the application (item 7).

You can change your password, email address, personal information, etc. by clicking on your name in the upper right of the application (item 8). Choose Setup to go to your personal setup page where you are presented with the various available options.

The Custom Links (item 9) in the sidebar contains the Support and Settings links. Support contains various information including links to our online training, release notes, contact information, etc. Settings allows for customization of different sections within TotalABA.

The sidebar can be expanded/collapsed via the arrows at the top/bottom of the sidebar (item 10).

Navigation – View Pages

Once any type of record is opened up in either view or edit mode, a screen similar to the above will be displayed. The record type and name is shown at the top of the screen (item 1).

When viewing the record, a link is displayed the top right of the screen that allows you to customize the page (item 2). This includes which related lists are displayed and in which order. A related list is a list of records that are associated to the main record being viewed. For example, appointments, authorizations, problems, etc. may be related to a student. These related lists along with their record count are displayed at the top of the record while in view mode (item 3). Hovering over the link will display those records right below the mouse pointer while clicking on the link will bring you to that related list within the view page.

Various sections in a view page may be collapsed/expanded by clicking on the black triangle to the left of the title (item 4).

Many fields in the application will have a yellow question mark icon to the right of the field label (item 5). Hovering over the icon will display additional help for that field.

Navigation – Popup Selection Windows
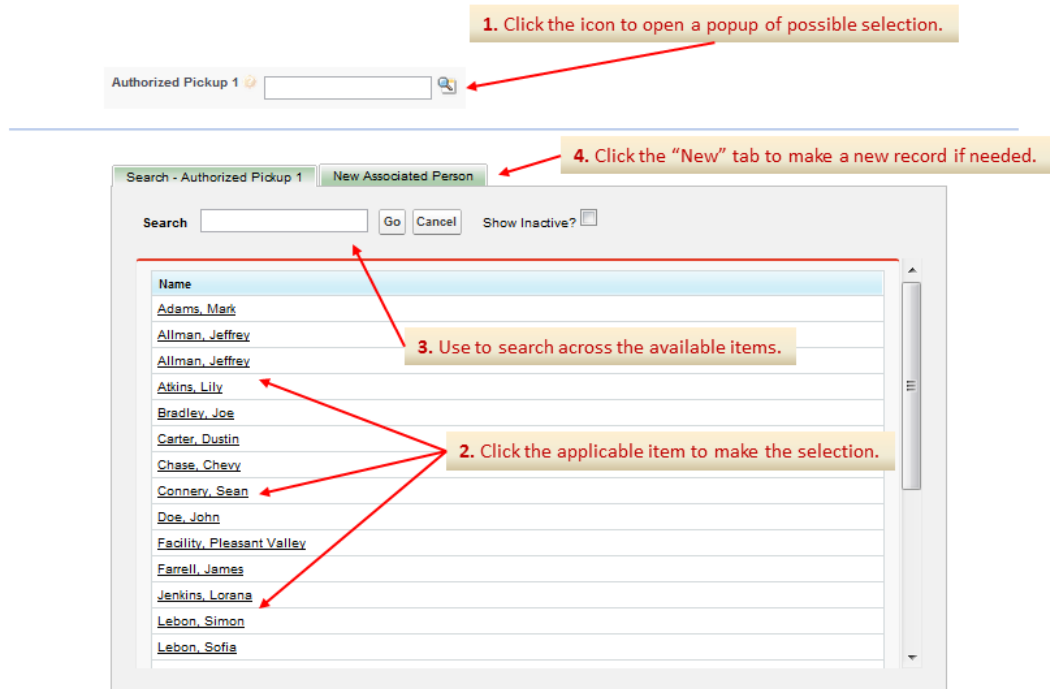
A popup window is used to allow for a selection across a list of items in the application. In the example above, it is used to select an associated person for the Authorized Pickup field on a student record. To access a popup selection window, click the search icon to the right of the field (item 1). Once the popup is opened, you can select one of the displayed items (item 2) or search for a specific item (item 3).

Some popup selection windows also allow for a new record to be entered directly from the window. In these instances, a tab will be available at the top (item 4). Simply click on this tab and enter the data to create the new record.

An alternative to using the popup selection window is to enter part or the entire record name in the field. When the record is saved, it will validate if the entry is correct. It will also alert you if duplicate possible records exist for your entry.

Inviscid
TotalABA Clinical Software