ITAS Data Portal

The ITAS Data Portal is a web-based application that provides the comprehensive functionality offered by the Trader Desktop and combines our extensive knowledge of the community trading industry with up to date technology and an enhanced user experience.

Access information for your Trading Entities and Companies

ITAS refers to a Company as a Trading Entity. You can view and switch between the information stored in ITAS for a Trading Entity by adding a tab to the Dashboard tab bar. The same Data Views can be accessed for each Trading Entity. Active Data Views are displayed as tabs in the Activity Tab Bar below the Trading Entity Tab Bar.

Dashboard

The Dashboard is a customisable view of the Data Portal that can be opened at any time by clicking the Dashboard tab at the top of the screen. The Dashboard Layout can be personalised to include links to commonly used features, incoming alerts or provide information about specific screens/Data Views.

Data Views

A Data View is a screen that displays specific information and can be opened from the navigation on the left. Data Views are grouped into several categories; Data, Documents, Reports or Applications. New Data Views can be created and Links to them can be added to the Dashboard.

Dashboard Layouts

When you initially open the Data Portal the Dashboard will be displayed using the Home layout which includes Links, Alerts and the Latest Information panels. You can create new layouts and add additional panels or widgets.

Dashboard Widgets and Panels

A Widget is a panel that is shown on the dashboard and is also referred to as a Panel. New Widgets can be added to the Dashboard or you can modify a Layout to include any Widget.

Add and Remove a Dashboard Panel or Widget

- Open the Layout Settings by clicking the cog icon next to the Layout field. This shows the panels/widgets included in the selected layout.
- Check the boxes to add or remove a panel/widget.

Create or Add a new Dashboard Layout

- Open the Layout Settings by clicking the cog icon next to the Layout field. This opens a panel that shows the panels/widgets included in the selected layout.
- Check the boxes to add or remove a panel/widget
- Click the Create New Layout icon
- Enter the Layout name and Save to add the new layout to the Layout selection field.

Add and Remove a Link to the Links panel

You can add Links that open the commonly used or important Data Portal screens:

- Navigate to a Data View from the bar on the left

- Open the Layouts list in the ribbon above the grid
- Click the Pin icon for the view you want to link to

Links Panel

The Links Panel contains links to any screen/Data View in the Data Portal. Each Link shows the path to the screen/Data View and, if the screen is a grid, the number of rows in the grid.

Alerts and Notifications Panel

The Alerts and Notifications panel displays messages based on events setup by the administrator. Existing alerts (in the ITAS Alerts Panel accessed from the Header Bar on the Data Portal) can be moved to the Dashboard Alerts panel by clicking the corresponding PIN icon.

System Events

System events such as Data Changes, Exports/Imports, Invoicing, etc can be monitored and Alerts generated to provide a real time summary of your system activity. Events can be created in the Workflow Manager.

Data Grids and Tables

The Data Portal uses Data Grids to provide ITAS information in a Table format. The Grids act as a starting point for users to access additional information, features and processes about the data, document, report or application. The Data Grid functionality includes search, data filtering, data layouts and data export.

Access and Manage your ITAS Data from the Data Manager

Access to your ITAS Data is executed from the Data Manager opened from the Data Menu. The Data is categorised based on the Data Type. You can open a Data View from the Data Manager and the data is presented in a Data Grid.

Access and Manage your Company Documents and Document Templates from the Document Manager

Access to the Documents you have stored in ITAS is executed from the Document Manager opened from the Docs Menu. You can open a Data View from the Document Manager and the documents are presented in a Data Grid.