# Quick Reference Guide: Directory Database

The software requires that you enter the various structural levels of your organization in descending order, down to each working extension. Smaller companies might use one of each level, but multiple extensions/users. You must specify one item at each level. If your organization does not use every level, define the unused ones as Undefined. You must add the components of the Directory database in consecutive order below the system-defined Organization symbol .

## ADDING AN ORGANIZATION LEVEL TO THE DIRECTORY DATABASE

Adding the highest organization level is the first step in creating the Directory database. Adding the lower levels (apart from the user level) involves the same steps with the exception being that you highlight a different organization symbol. To add a level, follow these steps:

There are two routes to adding an organization level:

- Using the **Add** menu item in the **Edit** menu
- Clicking the  button

These two methods are slightly different and are explained below.

- After highlighting a level, from the **Edit** menu, select the **Add** menu item to add any level above, or immediately below the selected level. An ***Add "level"*** dialog box will appear, and proceed with Step 1 below.
- After highlighting a level, click the  button to add a level immediately below the selected level. An ***Add "level"*** dialog box will appear, and proceed with Step 1 below.

1. At the ***Add "level"*** dialog box, enter a unique 30 character alphanumeric level name in the **Name** text box.
2. In the **Code** text box, enter a unique 20 character alphanumeric code for this level.
3. Enter the optional name and address information that will appear in a billing report.
4. Click the **Save** button.

**-or-**

5. Click the **Continuous Add** check box if you are adding more than one name at this level, and the dialog box will remain on the screen. When finished, click **Save** to close the dialog box.

## ADDING A USER TO THE DIRECTORY DATABASE

When adding a User, first select the Department in the Directory Database that you wish to place the User in. Again, it is important that this is correct. If, for example, Delilah Jones was hired in the Engineering Department, yet placed in the Product Management Department, the incoming and outgoing call record information of Delilah Jones would be sent to the wrong department, thus reporting for both departments would be inaccurate.

The ***Add Person*** screen is split into three main parts:

- General Information
- Objects
- Four tabs
    - Billing Addresses
    - Fixed Charges
    - Other Numbers
    - One Time Charges

## Adding Data to a User

If you have added a single user, you use the ***Add Person*** dialog box to add data for the user.

If you added a range of extensions, add data to each extension using the ***Edit Person*** dialog box. The ***Add Person*** and ***Edit Person*** dialog boxes are functionally identical, and the following instructions are the same for each.

### General Information Section

Information for working with each of these controls follows:

**Last Name:** Enter the user's last name in this text box.

**First Name:** Enter the user's first name in this text box. This is optional.

**Title:** Enter the user's title in this text box. This is optional.

**E-mail:** Enter the user's e-mail address in this text box. This is optional.

**Exclude this person from auto-mail:** Select this check box if you do not want this user to automatically receive reports via e-mail.

**Billing Class:** Assign the user a Billing Class (default is Billing Class 1) from the **Billing Class** list box. This selection will determine which Billing Descriptions are used to price the user's calls.

**Home Site:** Select the site where the user is physically located from the **Home Site** list box.

**Directory Import Key:** This is used when importing new directory information. Additionally, it can be used to assign multiple extensions to the same user, support name changes, and lets you automate moves and deletions. (Optional)

**Code:** In this text box, enter a unique code that will be used when the user's information is exported to a time and billing or accounting system. (Optional)

**Security Setting:** This button only appears for those with System Administrator or Database Administrator status. This button opens up a ***Directory Security*** screen where the Administrator assigns module, organizational, and data source access levels to a user. Please refer below for more information on the ***Directory Security*** screen.

**Room number:** Type a valid room number in this text box. This text box appears only if you purchased the optional Lodging module and specifies a guest's room number.

### Objects Section

In the Objects section, extensions, authorization codes, and facilities (these are referred to as "objects") are assigned, maintained, and displayed in a grid for each user.

#### Adding an Object

To add an object for a user, follow these steps:

1. Click the **Add** button.
2. At the ***Add Object*** dialog box, select the type of object.
3. Depending on the type of object selected, appropriate text boxes and list boxes will display.

#### Editing/Reactivating an Object

Only certain elements of each Object may be edited. If you need to change a non-editable element, you must first delete/deactivate that object and add a new one with the correct information. To edit an Object, follow these steps:

1. In the grid, select the Object to be edited.
2. Click the **Edit/Reactivate** button, and a dialog box appears.
3. Make the desired change, and click the **OK** button.

**Deleting/Deactivating an Object**

When deleting an Object, it is not removed from the database until all call records associated with the object have been processed. Until then, the object is considered "inactive." To do this, follow these steps:

1. Select the Object to be deleted.
2. Click the **Delete/Deactivate** button.
3. An ***Expire On?*** dialog box appears. Enter the time and date that you want the Object removed from the database.

#### BILLING ADDRESS TAB

The ***Billing Address*** tab allows you to add a name and address for the person that will appear in the Tenant Billing Report. Enter the appropriate information in the text boxes.

## Fixed Charges Tab

The ***Fixed Charges*** tab allows you to add monthly charges for the use of special equipment or features to a specific extension, or to all extensions within a department. A credit is expressed as a negative number -5.00. Fixed charges appear in Tenant Billing and Cost Summary Reports.

#### ASSIGNING FIXED CHARGES TO A USER

Once a fixed charge has been added to the Fixed Charges Pool, it can be added to a user. To add a charge to a user, follow these steps:

1. Click the **Add** button, and a ***Fixed Charges*** screen displaying all the charges and associated codes in a grid will appear.
2. Select a charge from the grid and click the **Apply** button.
3. A ***Fixed Charge Dates*** dialog box will appear, and perform the following:
    - The **Active On Date** text box will display the default date specified during the installation of the call accounting software. If you need to specify another date, enter it or click the **Calendar** button to select another. Enter the date in one of these formats: mmddyyyy, mm/dd/yyyy, or mm-dd-yyyy.
    - The **Expires on Date** text box will be blank. If you leave it blank, the charge will never expire. If you need to specify an expiration date, enter it or click the **Calendar** button to select one. Enter the date in one of these formats: mmddyyyy, mm/dd/yyyy, or mm-dd-yyyy.
4. Click the **OK** button to apply the charge, and you will return to the ***Fixed Charges*** screen.
5. There, select another charge or click **Close** to return to the ***Add Person*** screen.

## Other Numbers Tab

The ***Other Numbers*** tab stores a directory of useful information about the person, including home, car, fax, pager, Direct Inward Dialing (DID), and other numbers.

## One Time Charges Tab

The ***One Time Charges*** tab allows you to add monthly charges for the use of special equipment or features to a specific extension, or to all extensions within a department. A credit is expressed as a negative number -5.00. One Time charges appear in Tenant Billing and Cost Summary Reports.

One Time charges can be entered manually, or selected from the One Time Charges Pool.

#### ADDING A ONE TIME CHARGE MANUALLY

1. At the ***One Time Charges*** tab, click the **Add** button.
2. An ***Add One Time Charge*** dialog box will appear.
3. In the **Code** text box, enter a code for the charge. There is a limit of 20 alphanumeric characters. This is optional.
4. In the **Description** text box, enter a description for the charge. There is a limit of 20 alphanumeric characters. This is a required field.

5. In the **Unit Cost** text box, specify how much the charge costs per item. This is a required field.
6. Enter an optional comment in the **Comment** field. There is a limit of 15 alphanumeric characters.
7. In the **Date of Charge** text box, enter the date that the one time charge takes effect. The date must be entered in one of the following formats: mmddyyyy, mm/dd/yyyy, or mm-dd-yyyy. This is a required field.

#### ADDING A ONE TIME CHARGE FROM THE ONE TIME CHARGES POOL

1. At the ***One Time Charges*** tab, click the **Add** button.
2. An ***Add One Time Charge*** dialog box will appear.
3. Click the **Lookup** button, and an ***Add One Time Charge*** dialog box will appear. This dialog box contains items already added to the One Time Charges pool. See below for more information on the One Time Charges Pool.
4. In the **Unit Cost** text box, specify how much the charge costs per item. This is a required field.
5. From the list, select a one time charge, click the **OK** button, and you will return to the ***Add One Time Charge*** dialog box.
6. There, enter an optional comment in the **Comment** field. There is a limit of 15 alphanumeric characters.
7. In the **Date of Charge** text box, enter the date that the one time charge takes effect. The date must be entered in one of the following formats: mmddyyyy, mm/dd/yyyy, or mm-dd-yyyy. This is a required field.

# EDITING THE DIRECTORY DATABASE

## Editing an Organization Level

To edit an organization level, follow these steps:

1. At the main ***Directory Database*** screen, expand the organization tree, and highlight the level you want to edit.
2. Click the button, or select **Edit** from the **Edit** menu.
3. An ***Edit "level"*** screen for the selected level will appear.
4. Make the changes, and click the **OK** button to apply the changes, or the **Cancel** button to close the screen without applying the changes.

## Editing a User

To edit a user, follow these steps:

1. At the main ***Directory Database*** screen, expand the organization tree until the department containing the user you want to edit is displayed.
2. Select the department by clicking on the symbol, and the records of all the users in that department will appear in the right pane of the main ***Directory Database*** screen.
3. Select a user, and click the button next to the user whose record you want to edit.
4. An ***Edit Person*** screen containing that user's information will appear. This screen is similar to the one used for adding a user.
5. Perform the edits and click **OK** to save the changes.

# Deleting from the Directory Database

> **Note:** Only those with Administrative access can delete organization levels and users.

## Deleting a Single Level

To delete a single level from a database tree, follow these steps:

1. Select the level to be deleted.
2. Click the button, or press the **Del** key.
3. A Confirm Delete message appears. Click **Yes** to delete or **No** to abort.

> **Note:** All levels subordinate to a deleted level will be deleted!

## Deleting Multiple Levels

It is possible to delete more than one level at a time from a database tree. To delete levels that are sequential, follow these steps:

1. In the database tree, highlight the levels in the right window by clicking on the first level, and while holding down the **Shift** key, click the last level.
2. Click the button, or press the **Del** key.
3. A Confirm Delete message appears. Click **Yes To All** to delete all selected levels at once, **Yes** to delete each level individually, or **No**.

To delete levels that are not sequential, follow these steps:

1. In the database tree, highlight each level in the right window by clicking on it while holding down the **Ctrl** key.
2. Click the button, or press the **Del** key.
3. A Confirm Delete message appears. Click **Yes To All** to delete all selected levels at once, **Yes** to delete each level individually, or **No**.

> **Note:** All levels subordinate to a deleted level will be deleted!

## Deleting a User

When deleting a user, that user is not removed from the database. A user can only be completely removed from the system by inactivating the user, purging all CDR associated with that user, and then purging all inactive users with no CDR assigned to them.

1. Select the User to be deleted.
2. Click the button, or press the **Del** key.
3. An ***Expire On?*** dialog box appears. Enter the time and date that call records will no longer be charged to this user. The purge routine will purge a user's record according to the purge parameters defined.

Choosing to delete a user marks them as inactive. When you delete (inactivate) a user, all of their objects (extensions, cell phone numbers, etc.) and fixed charges are also inactivated. The user will remain in the database until there are no more calls or fixed charge transactions in the database for that user. This way, you can include the user in reports until their data is gone. The nightly purge deletes all call records and fixed charge transactions older than the date set. The system will then remove all of the inactive users who no longer have call record data or fixed charge transactions from the Directory database.

Further, once a user's status is changed to inactive, calls are no longer assigned to that user.

To delete a user, follow these steps:

1. In the left pane of the main ***Directory Database*** screen, highlight the level containing the user you want to delete.
2. In the right pane of the main ***Directory Database*** screen, select the check box next to the

user or users you want to delete.

3. From the **Edit** menu, select **Delete**, or click the button.
4. Click **OK** at the message box.
5. If you are deleting more than one user, click **Yes** to delete each selection individually, or click **Yes to All** to delete all your choices at the same time.

## DIRECTORY SECURITY SCREEN

At the ***Directory Security*** screen, an Administrator can specify a combination of users and organization levels a user can access, as well as recipients and types of e-mailed organizational reports. The top half of the screen is for performing a search and displaying the results, and the bottom half displays the organizational levels and people the user you are editing will have access to.

At the top of the ***Directory Security*** screen is a set of tabs that let an administrator grant access to various system functions as well as organizational levels and data sources.

| Tab | Explanation |
|---|---|
| ***Module Access*** | With this tab, a System Administrator or users with Directory Administrator privileges can assign access to system modules. A user cannot assign access to a module that they themselves cannot access. |
| ***Organizational Access*** | With this tab, a System or Directory Administrator can specify the organization levels a user can access. The top half of the screen is for performing a search and displaying the results, and the bottom half (Security and/or Auto Mail Access List) displays the organizational levels and people the user you are editing will have access to. |
| ***Data Source Access*** | With this tab System Administrator or users with Directory Administrator privileges specify which data sources the user can access. |

## SEARCHING THE DIRECTORY DATABASE

The **Search** function is used to quickly find a user or organizational level. You can search by data source, user's first or last name, organization name, organization code, title, extension, authorization code, fixed/one time charge code, or any combination of these.

> **Note:** It is important to remember that all of the search specifications entered in the text boxes are cumulative. This means that the more search criteria you specify, the more specific the search will become.

Next to data source, last and first name, organization name and code, and title are text boxes that let you determine how the search results will be sorted. Enter a number next to the search fields to indicate the order in which you want them to sort. The search function is accessed from the **Edit** menu, or by clicking the button. After selecting it, a ***Search Organization Tree*** dialog box will appear.

> **Note:** Those with View access cannot search on authorization code, title, or charge codes.

To search the Directory database, follow these steps:

The search function is accessed from the **Edit** menu, or by clicking the button. After selecting it, a ***Search Organization Tree*** dialog box will appear. Here, perform the following steps:

1. From the **Data Source** list box, select the data source.
2. Enter the search criteria in any or all of the text boxes. You may enter the first few characters of the value, as well.
3. In the **Sort Order** text boxes, specify how you want the your results sorted by entering a number in the adjoining field's **Sort Order** text box. The defaults are Organizational Name of

1 and Last Name of 2.

4. Click the **Find** button, and your results will be displayed in the **Search Results** table. Depending on the type of data searched (e.g., organization name, user name, authorization code, etc.), the results displayed will vary.
5. Double-click on a row or after selecting a row, click the **Go to** button, and you will be taken to that level in the main ***Directory Database*** screen.

# Moving Users from Department to Department

If someone in your company switches from one department to another, simply click and drag the name to the appropriate destination. Infortel Select automatically inactivates the User from the original department based on the date of the switch, and then activates the person in his or her new department. All of the existing settings are also transferred (extensions, Security access, etc)

For example, if Delilah Jones from the Engineering Department transfers to the Product Management Department, Infortel Select will be able to appropriately assign calls made from before and after she made the transfer. Once again, this shows the importance of maintaining an up-to-date Directory Database. If the Directory Database is not updated, reports will be thrown off as to which department calls were made and received in. To move a user using drag and drop, follow these steps:

- To move one user, follow these steps:

1. In the left pane of the ***Directory Database*** screen, expand the organization tree until the symbol containing the user you want to move is displayed
2. In the right pane of the ***Directory Database*** screen, highlight the user you wish to move.
3. While holding down the left mouse button, drag the person from the right pane to the desired Department in the left pane, and release the mouse button.

Using the **Search** function will help you find an organizational level that you want to move a user to.

> **Note:** Once a user is moved, they become inactive in their old location and active in their new location.

# Undefined Extensions

## Adding an Undefined Extension

When the call accounting software encounters an undefined extension, it will:

1. Create a person to be assigned to that extension.
2. Assign a last name of "Undefined" to the newly created person.
3. Assign a first name of "Extension XXXX" (where XXXX is the extension number) to the newly created person.
4. Add the person to the "Undefined" department.
5. Assign the default billing class to the new person.

- For the purpose of running the Undefined Extension report in the Directory, these are still considered unassigned calls.
- Also, for the purpose of General reports, these calls are also considered unassigned.

## Assigning Undefined Extensions to the Correct Departments

A person created by this process can be moved to any other department. The following will apply:

- When the person is moved, do not de-activate them in the "Undefined" department.
- Treat the person as if it always existed in the department to which it was moved. This way reports show the calls as belonging to the correct departments.
- As with any other record, you may edit the first and last names.
- If you assign an extension that already belongs to another person, you must deactivate the old person and then add the extension to the new person.

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