


Quick Reference Guide: Directory Database for the Web

You must add the levels of the Directory database in order below the 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.

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 & Close** button.

-or-

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

ADDING A USER TO THE DIRECTORY DATABASE

Whenever a user is added to the Directory database, that user is considered "active" until their status is changed to "inactive." To add a person, follow these steps:

1. At the main **Directory Database** screen, expand the level you want to add a person to until the  symbol appears. Click on the  symbol.
2. Click the  button, or from the **Edit** menu, choose **Add Person** from the submenu. With either method, the **Add Person** screen will appear.
3. The **Add Person** screen contains five tabs for adding information on a person, and above the tabs is a set of buttons.

Move: When you click this button, a screen will appear to let you move the current user to another organization level. See the section below for information on the Move feature.

Delete: This button deletes the current user from the database. See below for more information on

deleting a user.

Save: Click this button to save the information while keeping the screen displayed.

Save & Close: Click this button to save the information and close the screen.

Close: Click this button to close the screen without saving any information.

General Tab

The **General** tab is used for entering basic information for a user as well as indicating if the user will or will not receive automatically generated reports, specifying a Billing Class for the user, and assigning the user a security level.

Last Name: Enter the user's last name in this text box. This is a required field.

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 this 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 this list box.

Directory Import Key: The Directory Import Key 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: Clicking this button opens the Directory Security screen. The **Directory Security** screen is used to control:

- Who can enter the system
- Which components of the system a user can access
- Which data sources a user can access

See 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.

Objects Tab

Using the **Objects** tab, extensions, authorization codes, and trunk facilities (these types of data are referred to as "objects"), are added, maintained, and displayed in a table for each user.

It is important to keep in mind that an extension can be:

- An actual extension
- A credit card number or a portion of a credit card number
- A cell phone number

EXTENSIONS

An extension can be the actual extension, a credit card number, or a cell phone number assigned to a user.

If the user has a reporting extension, then that will be displayed instead of the user's raw extension.

- A reporting extension is an extension that shows up in a report. It could be the actual extension, the last four digits of a credit card number, or a portion of a cell phone number.
- A raw extension is an extension as it comes in from the CDR.

Note: Once you enter an extension and click the **Add New** button, you cannot change that extension. If you need to change it, you must delete that extension and add a new one.

Adding an Extension

Follow these steps to add an extension for a user:

1. In the **Extension** column, enter the extension as it appears in the CDR.
2. From the **Data Source** list box, select the data source of the extension.
3. From the **Type** list box, select the type of extension (for example, station or cell phone).
4. Leave the **Expires On?** column blank when adding a new user.
5. Do not select the **Import from File** check box unless you will be using the Directory Import utility.
6. If you do not want the user's actual extension to appear in reports, in the **Report As** column, enter a reporting extension for the current user. It could be the actual extension, the last four digits of a credit card number, or a portion of a cell phone number.

If you need to add another extension for this user, click the **Add New** button.

If the user has a reporting extension, then that will be displayed instead of the user's raw extension.

Deleting an Extension

To delete an extension, enter an expiration date in the **Expires On?** text box. The extension will become inactive after that date. The nightly purge will delete the extension once there are no more calls associated with the extension.

To delete an extension, perform the following:

- Enter a date in the **Expires On?** text box for the extension you want to delete.
- or-**
- Click the **Delete** button in the row of the extension you want to delete, and the current date is entered in the **Expires On?** text box.

AUTHORIZATION CODES

An authorization code is alphanumeric and has a limit of 15 characters.

Note: Once you enter an auth code and click the Add New button, you cannot change that auth code. If you need to change it, you must delete that auth code and add a new one.

Adding an Authorization Code

Follow these steps to add an authorization code for a user:

1. In the **Auth Code** column, enter the code assigned to this user.
2. In the **Data Source** column, select the data source for this user from the list box.
3. In the **Expires on?** column indicate when the code will become active or inactive.

If you need to add another authorization code for this user, click the **Add New** button.

Deleting an Authorization Code

To delete an authorization code, enter an expiration date in the **Expires On?** text box. The authorization code will become inactive after that date. The nightly purge will delete the authorization code once there are no more calls associated with the authorization code.

To delete an authorization code, perform the following:

- Enter a date in the **Expires On?** text box for the authorization code you want to delete.
- or-**
- Click the **Delete** button in the row of the authorization code you want to delete, and the current date is entered in the **Expires On?** text box.

TRUNK FACILITIES

Assigning a trunk facility to a user allows trunk-to-trunk calls to be assigned to a user.

Adding a Trunk Facility

Follow these steps to add a trunk facility for a user:

1. In the **Data Source** column, select the data source for this user from the list box.
2. In the **Facility** column, select the facility for this user from the list box. The facilities listed are those that belong to the Data Source selected from the **Data Source** column.

If you need to add another data source/facility combination for this user, click the **Add New** button.

Deleting a Trunk Facility

To delete a facility, click the **Delete** button in the row of the facility to be removed.

Charges Tab

The **Charges** tab lets you add one-time or fixed charges or credits for the use of special equipment or features to a specific user, or to all users within a department. A credit is expressed as a negative number -5.00. Fixed Charges appear in Tenant Billing and Cost Summary reports.

FIXED CHARGES

Adding Fixed Charges to a User

Once a fixed charge has been add to the Fixed Charges Pool, it can be added to a user.

To add a charge, follow these steps:

1. Click the **Add New** button, and a **Select Fixed Charges** screen displaying all the charges and associated codes will appear.
2. In the **Quantity** cell, specify how many units of the charge to apply to the person.
3. Next, you may accept the default Active on? date, or enter a new one. Enter the date in one of these formats: mmddyyyy, mm/dd/yyyy, or mm-dd-yyyy.

4. Click the **Apply** button to apply the charge, and you will return to the **Charges** tab. Assign an expiration date to each charge in the **Expires On?** cell.
5. If you need to add an additional charge, click the **Add New** button, and a new row will appear in the **Fixed Charges** table.
6. Click the **Save** button to save the change.

Removing Fixed Charges From a User


Enter a date in the **Expires On?** text box for the fixed charge you want to remove from a user. This will stop the charge from accruing. Enter the date in one of these formats:

- mmddyyyy
- mm/dd/yyyy
- mm-dd-yyyy

Adding Fixed Charges to an Entire Department

Once a fixed charge has been add to the Fixed Charges Pool, it can be added to all the users in a department.

To add a charge to all the users in a department, follow these steps:

1. At the main **Directory Database** screen, select the department you want to add equipment to by clicking on the symbol in the right hand pane.
2. Click the  button, or from the **Edit** menu select the **Edit** menu item, and the **Edit Department** screen will appear.
3. At the bottom of the screen, is a table displaying Fixed Charges information for the selected department.
4. Below the table, click the **Allocate a fixed charge to all Department members** button, and a **Select Fixed Charges** screen displaying all the charges and associated codes appears.
5. In the **Quantity** cell, specify how many units of the charge to apply to the department.
6. Next, you may accept the default Active on? date, or enter a new one. Enter the date in one of these formats: mmddyyyy, mm/dd/yyyy, or mm-dd-yyyy.

Active on? determines if a charge is pro-rated. Leaving it blank indicates that the charge will not be pro-rated. For example, a \$10.00 charge is set to occur on the 30th of the month. If the Active on? date is blank, the person is charged \$10.00 on the 30th of every month after the charge was added. If the Active on? date is entered as the 15th of the month, then the charge is pro-rated the first month (\$5.00) and is \$10.00 per month after that.

7. Click the **Apply** button to apply the charge, and you will return to the **Edit Department** screen.
8. If you need to add an additional charge, click the **Allocate a fixed charge to all Department members** button, and a new row will appear in the **Fixed Charges** table.
9. Click the **Save** button to save the change.

ONE TIME CHARGES

Adding One Time Charges to a User

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

- To enter a charge manually, follow these steps:

1. If there is not a blank row in the **One Time Charges** table, click the **Add New** button.
2. In the **Code** field, enter a code for the charge. There is a limit of 20 alphanumeric characters. This is optional.
3. In the **Desc.** field, enter a description for the charge. There is a limit of 20 alphanumeric characters. This is a required field.
4. In the **Quantity** field, specify how many units of the charge to apply to the person. This is a required field.
5. In the **Unit Charge** field, specify how much the charge costs per item. This is required. The **Ext. Charge** field will automatically fill in with the unit charge multiplied by the quantity.
6. Enter an optional comment in the **Comment** field. There is a limit of 15 alphanumeric characters.
7. In the **Charge Date** field, 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.
8. If you need to add an additional charge, click the **Add New** button, and a new row will appear in the **One Time Charges** table.
 - To select a charge from the One Time Charges Pool, follow these steps:
 1. Click the **Add from List** button, and a **Select One Time Charges** screen will appear.
 2. In the **Quantity** cell for a charge, specify how many units of the charge to apply to the person.
 3. Enter an optional comment in the **Comment** field. There is a limit of 15 alphanumeric characters.
 4. In the **Charge Date** field, 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.
 - 5. Click the **Apply** button to apply the charge, and you will return to the **Charges** tab.

Removing One Time Charges From a User

Click the Delete button that is next to the one time charge you want to delete from the user.

Other Numbers Tab

The Other Numbers tab stores a directory of home, car, fax, pager, DID (direct inward dialing), and other numbers for a person. Enter each number in the appropriate text box.

Note: The numbers entered at this tab are for reference only and do not appear in any reports.


Billing Address Tab

The Billing Address tab lets you add a name and address for this person that will appear in a Tenant Billing report. Enter the information in the appropriate text boxes.

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 **Editing "level"** screen for the selected level will appear.
4. Make the changes, and click the **Save & Close** 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. Click the **Edit** button next to the user whose record you want to edit.
4. An **Edit** screen containing that user's information will appear. This screen is similar to the one used for adding a user.
5. Click one of the tabs at the top of the screen to move to that section, and perform the edit.


DELETING FROM THE DIRECTORY DATABASE

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

Deleting an Organization Level

An organization level cannot be deleted if there are users below it. All users must be deleted, deactivated, and purged before the level can be deleted.

To delete an organization level, follow these steps:

1. At the main **Directory Database** screen, highlight the level to be deleted.
2. From the **Edit** menu, select **Delete Organization**, or click the **Delete** button .

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.

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 **Directory Database** main screen, select the check box next to the user or users you want to delete.
3. From the **Edit** menu, select **Delete User**, or click the **Delete User** 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.

MOVING A USER

The Move function lets you move one or more users to a different organization level. To move a user or users, follow these steps:

1. At the main **Directory Database** screen, expand the organization tree until the  symbol containing the user(s) you want to move is displayed.
2. Select the  symbol, and the users in that level will appear in the right pane of the main Directory screen. Select the check box next to each user you want to move.
3. Click the  button, or select **Move Users** from the **Edit** menu. A **Move** screen will appear. This screen is used to specify where you want the user(s) moved.
4. At the top of the **Move** screen is a **Move Selected Users to:** list box and text box. These are used to search for the organization level you want to move the user(s) to.
5. With the list box, specify if you want to search by the organization level name or code.
6. In the text box, type the organization level name or code.
7. Click the **Search** button, and your results will be displayed in a table. The results will display the lowest organization levels because this is where the users' records are located.
8. Next to each search result displayed in the table, a **Move** button will appear. Click the **Move** button that is next to the organization level you want the user(s) moved to.

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

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.

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

The search function is accessed from the **Edit** menu, or by clicking the  button. After selecting it, a **Search** screen will appear. To search the Directory database, follow these 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 **Search** button, and your results will be displayed in a **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. In the **Name** column of the **Search Results** table, place your cursor over the name, and it becomes highlighted. Click on the name, and that user's information will appear for editing.

Note: Exceptions based on security level:

- If you are searching for a user, after clicking the **Go to** button, an **Edit** screen will display for that user. Only those with Administrator and User privileges are able to access this screen.
- For those with View access, the main **Directory Database** screen will display the expanded organization level to which the user searched for is located in, but not the user's **Edit** screen.

DIRECTORY SECURITY SCREEN

The Directory Security screen is used to control:

- Who can enter the system
- Which components of the system a user can access
- Which organizational levels a user can access (By default a user can access only themselves.)
- Which data sources a user can access

At the top of the screen is a set of buttons and a text box that let an administrator designate an ID for a user. In the lower part of the screen are three tabs that let an administrator grant access to various system functions as well as organizational levels and data sources. Please refer to the table below for more information on these tabs.

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 Administrator or a user with Directory Administrator access privileges 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.

OPTION MENU UTILITIES

Filter Tree View

The **Filter Tree View** menu item lets you display all extensions, active extensions, or inactive extensions for a specific home site or all home sites. In addition, you can opt to have organization levels with no people assigned to them to not be displayed in the organization tree. To use this menu item, follow these steps:

1. From the **Options** menu, select **Filter Tree View**, and a **Select Filter** screen will appear.
2. From the **Extensions/Auth. Codes** list box, select which type of extension (active, inactive, or all) to display in the organization tree.
3. From the **Home Sites** list box, select a home site (or all home sites) to be displayed.
4. If you want to have organization levels with no people assigned to them to not be displayed in the organization tree, select the check box.
5. Click the **Reload** button to have your selections take effect, or click **Cancel** to close the **Select Filter** screen.
6. If you click **Reload**, the choices selected will be saved for the user that made them.

Note: The two list boxes can be used in combination with each other. For example, you can choose to only have inactive extensions from a specified home site be displayed in the organization tree.

Displaying Active and Inactive Persons

To display persons with active, inactive, or all extensions in the main **Directory Database** screen, follow these steps:

1. From the main **Directory Database** screen, select the **Options** menu.
2. Select the **Filter Tree View** menu item.
3. At the **Select Filter** dialog box, select how to filter the directory from the list boxes.
 - From the **Extensions** list box, select **All** to display users with both active and inactive extensions, **Active** to display people with just active extensions, or **Inactive** to display people with inactive extensions.
 - From the **Site** list box, select **All** to display all sites, or select a specific site.
4. Click the **Reload** button.

PURGE INACTIVE OBJECTS

Clicking on the **Purge Inactive Objects** menu item opens a screen that lets you delete all inactive users, objects (except one time charges), and fixed charges. To purge inactive objects, follow these steps:

1. From the **Option** menu, select **Purge Inactive** Objects.
2. A screen appears that lets you specify which objects to purge.
3. Click the **OK** button, and those objects will be removed from the Directory database.

Note: This function is available only for those with Administrator level access.



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