



IFW v. 4.2 DIRECTORY DATABASE

IFW 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/people. 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 A COMPANY

The first step in creating the Directory database is adding a Company. To add a Company, follow these steps:


- 1) In the Directory database screen, highlight the Organization symbol .
- 2) From the **Edit** menu, select **Add**.
- 3) Choose **Add Company** from the submenu, and the Add Company dialog box appears.
- 4) At this dialog box, enter a unique Company name in the **Name** text box.
- 5) In the **Billing Code** text box, enter an optional Billing code.
- 6) Click the **OK** button, or click the **Continuous Add** check box if you are adding more than one Company, and the Add Company dialog box will remain on the screen.

A note about Billing codes: billing codes are values used to cross-reference a client with your company's internal accounting system for billing purposes. For example, if your company rents suites of offices and bills tenants for phone calls made, each tenant can be identified with a Billing code.

Billing codes may be assigned while editing any organizational level (except Extensions where they may be assigned while adding the Extension) and are displayed only in Tenant Billing Reports.


ADDING A DIVISION

After a Company is set up, the next level to add is Division. To add a Division, follow these steps:

- 1) In the Directory database screen, highlight the Company symbol  to which you want to add a Division.
- 2) From the **Edit** menu, select **Add**.
- 3) Choose **Add Division** from the submenu, and the Add Division dialog box appears.
- 4) At this dialog box, enter a unique Division name in the **Name** text box.
- 5) In the **Billing Code** text box, enter an optional Billing code.
- 6) Click the **OK** button, or click the **Continuous Add** check box if you are adding more than one Division, and the Add Division dialog box will remain on the screen. When finished, remove the check mark and click **OK** to close.


ADDING A COST CENTER

Add a Cost Center under each Division. Remember that these structure names are Infortel for Windows' reference to your organizational structure, and may apply differently in your organization. To add a Cost Center, follow these steps:

- 1) In the Directory database screen, highlight the Division symbol  to which you want to add a Cost Center.
- 2) From the **Edit** menu, select **Add**.
- 3) Choose **Add Cost Center** from the submenu, and the Add Cost Center dialog box appears.
- 4) At this dialog box, enter a unique Cost Center name in the **Name** text box.
- 5) In the **Billing Code** text box, enter an optional Billing code.
- 6) Click the **OK** button, or click the **Continuous Add** check box if you are adding more than one Cost Center, and the Add Cost Center dialog box will remain on the screen. When finished, remove the check mark and click **OK** to close.

ADDING A DEPARTMENT

The level below the Cost Center is Department. To add a Department, follow these steps:

- 1) In the Directory database screen, highlight the Cost Center symbol  to which you want to add a Department.
- 2) From the **Edit** menu, select **Add**.
- 3) Choose **Add Department** from the submenu, and the Add Department dialog box appears.
- 4) At this dialog box, enter a unique Department name in the **Name** text box.
- 5) In the **Billing Code** text box, enter an optional Billing code.

- 6) Click the **OK** button, or
- 7) Click the **Continuous Add** check box if you are adding more than one Department, and the Add Department dialog box will remain on the screen. When finished, remove the check mark and click **OK** to close.


ADDING EXTENSIONS

Below the Department level is where Extensions for individual phones are added.

Adding a Range of Extensions

If this is your initial setup, or if you need to add a range of Extensions, follow these steps:



The **Add Extension Range** menu item lets you enter the entire range of Extensions you need for a department. For example, if you need to add 25 people in Sales, you can add Extensions 1-25 in one step.

- 1) In the Directory database screen, highlight the Department symbol  to which you want to add the range of Extensions.
- 2) From the **Edit** menu, select **Add**.
- 3) Choose **Add Extension Range** from the submenu, and the Add Item Range dialog box appears.
- 4) At this dialog box, enter the first Extension number in the **Start** text box.
- 5) Enter the last Extension number in the **End** text box.
- 6) Assign the entire range of Extensions to a Billing Class using the **Billing Class** drop-down list box.
- 7) With the **Site** drop-down list box, assign the entire range of Extensions to a Site.
- 8) Click **OK**.

To add specific data to each Extension, please refer to that section below.

Adding a Single Extension

To add a single Extension, follow these steps:

- 1) In the Directory database screen, highlight the Department symbol  to which you want to add an Extension.
- 2) Click the  button, or from the **Edit** menu, select **Add**.
- 3) Choose **Add Extension** from the submenu, and the Add Extension dialog box appears.

This is the first in a series of tabbed screens. Each of these tabs is discussed in the following sections.

ADDING DATA TO EACH EXTENSION

If you have added a single Extension, the Add Extension dialog box will appear. Use this box to add data to the Extension.

If you added a range of Extensions, add data to each extension using the Edit Extension dialog box. The Add Extension and Edit Extension dialog boxes are functionally identical, and the instructions that follow are the same for each.

General Tab

The **General** tab lets you enter basic information about the person who will use the new extension.

- Enter the **First Name**, **Last Name**, and the **Extension** number in the text boxes.
- The **Line Type** drop-down list box lets you label the type of line used at the Extension. The label selected will appear in reports.
 - **Station** – Refers to an ordinary phone.
 - **Attendant** – Refers to auto-attendant, front desk, or any person whose primary responsibility is to answer inbound calls before transferring them. Any extension designated as **Attendant** will have incoming and outgoing calls tabulated separately in the lower right section of the **Infotel for Windows Control Center**.
 - **Data** – Refers to fax, modem, or any other type of data line.
 - **Executive** – Refers to a station whose activity, because it might reveal sensitive information, will not appear in report detail. The cost of these calls, however, is calculated into the totals of summary reports.
 - **ACD** – Refers to **A**utomatic **C**all **D**istribution.
 - **Voice Mail** – Refers to a voice mail port.
 - **VAU** – Is a **V**oice **A**nnouncement **U**nit in **ACD** applications.
 - **Guest** – Any student, hotel guest, tenant, etc. in a real-time account detection application.
- In the **Title** text box, enter the title of the person the Extension is assigned to.
- In the **Billing Code** text box, enter a Billing code used to cross-reference a client with your company's internal accounting system for billing purposes.
- In the **Auth Code** text box, enter an Authorization code for the Extension. An Authorization code is a code assigned at the PBX to allow certain Extensions to make certain kinds of calls. When Infotel for Windows reads the CDR, it will recognize the Authorization code, and strip it from the digits dialed to properly bill the call.
- In the **Billing Class** drop-down list box, assign the Extension to its own Billing Class.

- If you are adding more than one extension, click the **Continuous Add** check box, and the Add Extension dialog box will remain on the screen. When finished, remove the check mark and click **OK** to close.

Equipment Charges Tab

The **Equipment Charges** tab lets you add monthly charges for the use of special equipment or features to a specific extension, or to all extensions within a department. Equipment Charges appear in Tenant Billing and Cost Summary reports.

There are two steps to adding equipment charges.

- 1) First, you must create the Equipment Charge Pool.
- 2) Then, add the equipment to the extension(s).


1. Creating the Equipment Charge Pool

To create a database of equipment and charges, follow these steps:

- 1) From the Directory Database screen, select the **Options** menu.
- 2) Select the **Equipment Charges Pool** menu item, and the Equipment Charges dialog box appears.
- 3) Click the **Add** button and the Create Equipment Charge dialog box will appear:
- 4) Add an Equipment Type and its Monthly Charge and click **OK**. The Equipment Type and its Charge will then be added to the Equipment Charge Pool.

2. Adding Equipment to Extensions

Once added to the Equipment Charges Pool, the equipment may be assigned to the Extension(s) that use it. To specify which Extension uses which type of equipment, follow these steps:

- 1) In the Directory Database screen, highlight the extension to which you want to add equipment.
- 2) Click the  button, or from the **Edit** menu, select the **Edit** menu item.
- 3) The Edit Extension dialog box appears, select the **Equipment Charges** tab, and click the **Add** button.
- 4) The Equipment Charges dialog box will display, and highlight the item you want to add.
- 5) Click the **Apply** button, or if you wish to add the equipment to every Extension in the Department, click **Apply To All**.
- 6) Repeat these steps for every extension to which you want to add equipment.

To maintain the Equipment Charge Pool, you can:

- 1) Edit the Equipment Charge Pool, or
- 2) Delete Equipment

1. Editing the Equipment Charge Pool

You are able to edit the Equipment Charge Pool at any time. For example, if the cost of a 10-button desk set goes up, you can update the increase by following these steps:


- 1) From the Directory Database screen, select the **Options** menu.
- 2) Select the **Equipment Charges Pool** menu item, and the Equipment Charges dialog box appears.
- 3) Select the Equipment Type, and click the **Edit** button. An Edit Equipment Charges dialog box will appear.
- 4) At the dialog box make the desired changes and click **OK**.

After the updates are made, all extensions that use the edited Equipment Type will reflect the new charge.

2. Deleting Equipment

By clicking the **Delete** button in the Equipment Charges dialog box, you can remove any Equipment Type and its Charge from the Equipment Charge Pool. However, before you can delete a piece of equipment, you must first remove it from each extension that uses it.

To delete an equipment charge from an extension:

- 1) In the Directory Database screen, highlight the extension from which you want to remove equipment.
- 2) Click the  button, or from the **Edit** menu, select the **Edit** menu item.
- 3) The Edit Extension dialog box will appear, and select the Equipment Charges tab.
- 4) Highlight the item you want to remove, and click the **Remove** button.
- 5) Repeat these steps for every extension from which you want to remove equipment.


After you have removed the equipment from every extension that uses it, follow these steps to remove it from the Equipment Charge Pool:

- 1) From the Directory Database screen, select the **Options** menu.

- 2) Select the **Equipment Charges Pool...** menu item.
- 3) At the Equipment Charges dialog box, highlight the equipment to be removed.
- 4) Click the **Delete** button.


Address Tab

The **Address** tab lets you add Addresses for an Extension. The Address information will appear in Tenant Billing Reports. To use the Address tab, follow these steps:

- 1) In the Directory Database screen, highlight the Extension to which you want to add an Address.
- 2) Click the  button, or from the **Edit** menu, select the **Edit** menu item.
- 3) The Edit Extension dialog box will appear, and select the **Address** tab.
- 4) Enter the information in the appropriate text boxes, and click **OK**.


Rollover Tab

If you have a system where Rollover numbers are available for specific Extensions, this function lets you enter alternate extension numbers if a primary Extension is busy. The information entered at this tab is for reference only and does not appear in any reports.

- 1) In the Directory Database screen, highlight the Extension to which you want to add a Rollover Extension.
- 2) Click the  button, or from the **Edit** menu, select the **Edit** menu item.
- 3) The Edit Extension dialog box will appear, and select the **Rollover** tab.
- 4) Click the **Add** button, and the Add Rollover dialog box will appear.
- 5) Enter the Rollover Extension in the text box.
- 6) Click **OK**, and the Rollover number will appear in the **Rollover** tab screen.
- 7) To delete a Rollover number, highlight the number in the **Rollover** tab and click **Delete**.

Shared Tab


This function lets you assign multiple names to a particular extension. This may be useful in a situation where users share an office. The information entered at this tab is for reference only, and does not appear in any reports. To use the **Shared** tab, follow these steps:

- 1) In the Directory Database screen, highlight the Extension to which you want to add a Shared name.
- 2) Click the  button, or from the **Edit** menu, select the **Edit** menu item.
- 3) The Edit Extension dialog box will appear, and select the **Shared** tab.
- 4) Click the **Add** button, and the Add Name dialog box will appear.
- 5) Enter the First and Last names in the appropriate text boxes.
- 6) Click **OK** and the Shared name will appear in the **Shared** tab screen.
- 7) To delete a Shared name, highlight the name in the **Shared** tab screen, and click **Delete**.

Other Numbers Tab

The **Other Numbers** tab stores a directory of, home, car, fax, pager, data, Direct Inward Dialing (DID), and other numbers for a specified Extension.

To use the **Other Numbers** tab, follow these steps:


- 1) In the Directory Database screen, highlight the Extension to which you want to add other numbers.
- 2) Click the  button, or from the **Edit** menu, select the **Edit** menu item.
- 3) The Edit Extension dialog box will appear, and select the **Other Numbers** tab.
- 4) Enter each number in the appropriate text box.

Credit Card Tab

This option lets you add telephone credit card numbers for specific extensions. This is useful when an individual is assigned a company telephone credit card.

Please note: Credit Card Numbers **do not** appear in any report.

To use the **Credit Cards** tab, follow these steps:


- 1) In the **Directory Database** screen, highlight the Extension to which you want to add credit card numbers.
- 2) Click the  button, or from the **Edit** menu, select the **Edit** menu item.
- 3) The Edit Extension dialog box will appear, and select the **Credit Cards** tab.

- 4) To add a Credit Card Number, click the **Add** button, and the Add Credit Card dialog box appears.
- 5) Enter the Credit Card Name in the **Type** text box, and its Number in the **Number** text box, and click **OK**.
- 6) To edit an existing Credit Card Number, at the **Credit Cards** tab, highlight the Credit Card Name, and click **Edit**. An Edit Credit Card dialog box will appear.
- 7) To delete a Credit Card Number, at the **Credit Cards** tab, highlight the Credit Card Name, and click **Delete**.

Site Tab

The **Site** tab is used to identify the PBX or Key System (if multiple sites exist) to which an extension is connected. When there is more than one site, this allows Infotel for Windows to interpret identical extension numbers. In addition, you can display and report by sites (PBXs), or by organizational levels (Company, Division, Cost Center, Department, or Extension). Finally, if multiple sites exist, an organizational level can be spread across each site and still be monitored as a cohesive unit.


Sites are defined during system installation and configuration. The number of sites that appear in the drop-down list box depend upon the size of the multi-site package that you purchased. To use the **Site** tab, follow these steps:

- 1) In the Directory Database screen, highlight the Extension that you want to associate with a Site.
- 2) Click the  button, or from the **Edit** menu, select the **Edit** menu item.
- 3) The Edit Extension dialog box will appear, and select the **Site** tab.
- 4) Click the **Site** drop-down list box, and select the desired Site.

Click the **Continuous Add** check box if you are adding multiple extensions to a department. This feature saves the previous extension's data for the next entry except for the extension number that is automatically incremented.

Editing the Directory Database

Every level in the Directory database except the Organizational level may be edited. To edit an Extension, please refer to that section above. To change the name of an existing Company, Division, Cost Center, or Department level, follow these steps:


- 1) In the Directory Database screen, highlight the level you wish to edit.
- 2) Click the  button, or from the **Edit** menu, or by right clicking in the screen to display the pop-up menu, select the **Edit** menu item, and an Edit Level dialog box appears.
- 3) Make the desired changes and click the **OK** button.

Deleting from the Directory Database

When deleting a level from the Directory database tree, **be aware that all levels below the chosen level will be deleted as well.**



DELETING A SINGLE LEVEL

To delete a level, follow these steps:

- 1) Highlight the branch to be deleted in the Directory tree.
- 2) Click the  button, or press the **Del** key.
- 3) A dialog box will appear asking if you want to delete the selected level.

DELETING MULTIPLE LEVELS

It is possible to delete more than one level at a time from the Directory database tree.

- If you wish to delete levels that are sequential, follow these steps:
 - 1) Highlight the levels in the **right** window in the Directory tree by clicking on the first level. While holding down the **Shift** key, click the last level.
 - 7) Click the  button, or press the **Del** key.
- If you wish to delete levels that are not sequential, follow these steps:
 - 1) Highlight each level in the **right** window in the Directory tree by clicking on it while holding the down the **Ctrl** key.
 - 2) Click the  button, or press the **Del** key.

In either case, a dialog box will appear asking if you want to delete the selected levels.

Moving Levels within the Directory Screen

To move Extension(s) from one Department to another Department, you may drag and drop the selected Extension(s).

MOVING A SINGLE EXTENSION

To move one Extension, follow these steps:

- 1) In the **left** pane of the Directory Database screen, select the Department you wish to move the Extension from.
- 2) In the **right** pane of the Directory Database screen, highlight the Extension you wish to move.
- 3) While holding down the left mouse button, drag the Extension from the **right** pane to the desired Department in the **left** pane, and release the mouse button.

MOVING MORE THAN ONE EXTENSION

It is also possible to move more than one Extension at a time. To move more than one sequential Extension, follow these steps:

- 1) In the **left** pane of the Directory Database screen, select the Department you wish to move the Extension from.
- 2) In the **right** pane, highlight the first Extension in the series by clicking on it. While holding down the **Shift** key, click the last Extension in the series.
- 3) Drag the Extensions from the **right** pane to the desired Department in the **left** pane, and release the mouse button.
 - If the Extensions are not sequential, then:
 - 1) In the **left** pane of the Directory Database screen, select the Department you wish to move the Extension from.
 - 2) In the **right** pane highlight each desired Extension by clicking on it while holding down the **Ctrl** key.
 - 3) Drag the Extensions from the **right** pane to the desired Department in the **left** pane, and release the mouse button.


To View a Specific Site in a Multi-site Setup

If you have a multi-site environment and wish to view a Directory tree for a specific site:

- 1) Open the Directory Database screen, and from the Menu Bar, click the **Options** menu.
- 2) Select the **Select Sites** menu item, and the Select Sites to View dialog box appears.
- 3) Click the **Select Single Site** down arrow, and select the desired site.
- 4) Click **OK**.

Searching the Directory Tree

You can search any Organizational level in the Directory database. To perform a search, follow these steps:

- 1) Open the Directory Database screen.
- 2) Click the  button, or from the **Edit** menu, select the **Find** menu item.
- 3) A Search organization tree dialog box will appear:
- 4) Type the department, person's name or extension in the **Org (last) name or extension** text box. You may enter a truncated search string.
- 5) Click the **Search** button, and your results will be displayed in the grid.
- 6) Double click on the line containing your desired result (a pound sign (#) will appear), and click the **Go to selected** button.
- 7) The Search organization tree dialog box will close, and in the left pane, the system will immediately jump to the retrieved search string and select it.