IFW Quick Reference Guide: 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 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 person level) involves the same steps with the exception being that you highlight a different organization symbol. To add a level, follow these steps:

1) If you are adding the highest level in the Directory database screen, highlight the system-defined Organization symbol , and go to Step 3.
2) If you are adding a lower level, highlight the symbol that you want to add the level to.
3) From the **Edit** menu, or by right clicking in the screen to display the pop-up menu, select **Add**.
4) Choose **Add Level** from the submenu, and the Add dialog box for that level will appear.
5) At this dialog box, enter a unique level name in the **Name** text box.
6) In the **Billing Code** text box, enter an optional Billing code.
7) Enter the optional name and address information that will appear in a billing report.
8) Click the **OK** button, or 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.

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.

Caution: 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**.

Caution: All levels subordinate to a deleted level will also be deleted!

Adding a Person to the Directory Database

You can add people individually, or a range of extensions.

Adding a Person

To add a person, follow these steps:

1) Highlight the symbol that will contain the new person.
2) Click the button to display the pop-up menu, and select **Add**.
3) Choose **Add Person** from the submenu, and the Add Person dialog box will appear.

Adding a Range of Extensions

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

1) Highlight the symbol that will contain the range of extensions.
2) From the **Edit** menu, or by right clicking in the screen to display the pop-up menu, select **Add**.
3) Choose **Add Extension Range** from the submenu, and the Add Item Range dialog box will appear.
4) 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, and click **OK**.

Adding Data to a Person

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

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.

1) Enter the last and first names of the person in the text boxes.
2) In the **Title** text box, enter the title of the person, if applicable.
3) In the **e-mail** text box, enter the e-mail address of the person.
4) If you do not want this person to automatically receive reports via e-mail, select the **Exclude This Person From Auto-Mail Reports** check box.
5) In the **Billing Class** drop-down list box, assign the person a billing class.
6) If there is more than one extension assigned to a person, in the **Directory Import Key** text box, enter the key that will identify those extensions with that person. (This is optional.)
7) In the **Billing Code** text box, enter a billing code used to cross-reference this person with your company's internal accounting system for billing purposes. (This is optional.)
8) Type a valid room number in the **Room Number** text box. This text box appears only if you purchased the optional Lodging module.

Inactivating a Person

When inactivating a person, that person is not removed from the database. A person can only be completely deleted from the system by inactivating the person, purging all CDR associated with that person, and then purging all inactive users with no CDR assigned to them. To do this, follow these steps:

1) Select the Person 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 person. The purge routine will purge a person's record according to the purge parameters defined.

Objects Section

In the Objects section, extensions, authorization codes, and calling card numbers are added, maintained, and displayed in a grid for each person.

Adding an Object

To add an object for a person, 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 drop-down 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 lets you add a name and address that will appear in a Tenant Billing report. Enter the information in the text boxes and click **OK**.

FIXED CHARGES TAB

The Fixed Charges tab lets you add one-time or monthly charges (or credits) for the use of special equipment or features to a specific extension, or to all extensions within a department. Fixed Charges appear in Tenant Billing and Cost Summary reports. See below for more information on setting up a Fixed Charges Pool.

Assigning Fixed Charges to People

Equipment may be assigned to a person, or that person's entire department. To assign a fixed charge, follow these steps:

1) Select the Fixed Charges tab.
2) Click the **Add** button, and the Fixed Charges dialog box will display.
3) Highlight the item you want to add, and click the **Apply** button to add the charge to that person.
4) If you wish to add the equipment to everyone in the selected person's department, click the **Apply To All** button.
5) On the Fixed Charges tab, click the **+** button to increase the quantity of the equipment or the **–** button to reduce the quantity.
6) Repeat for every person to which you want to add equipment.

OTHER NUMBERS TAB

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

SYSTEM ACCESS TAB

The System Access tab lets an Administrator assign passwords to a user. The password determines which features are accessible to a particular user.

The **Limit Access To** button on the System Access tab opens up the Directory Security screen. At this screen, an Administrator can specify people and organization levels a person can access, as well as recipients of e-mailed reports. If you purchased the PSP module, please note the following:

- A person with Administrator level access rights is able to edit all calls.
- Those without Administrator level access rights are only able to edit calls for the level specified when their password was set up.

Adding a Password

The administrator's password should be added first so that the administrator can set up passwords for the other levels. Passwords are not case-sensitive. To set up passwords, follow these steps:

1) In the **User ID** text box, enter the name of the user.
2) In the **Password** text box, enter a password for the user.
3) In the **Verify Password** text box, re-enter the password to confirm it.
4) Select Administrator (or any other level) from the **Access Level** list.
5) Click the **Limit Access To** button to set the security level and auto-mail report distribution list for this person.

Directory Security Screen

At the Directory Security screen, an Administrator can specify a combination of people and organization levels a person 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 person you are editing will have access to.

Adding to the Security/Auto Mail Access List

- Select the result in the Search result grid, and click the **Add** button.

To remove an item from the Security/Auto Mail Access List

- Select it in the Security/Auto Mail list and click the **Remove** button.

To clear all entries in the Security/Auto Mail list

- Click the **Reset All Access** button.

To Perform a Search

In order to assign a security level and a reports list to this person, you must first perform a search.

1) In the **Search For** drop-down list box, select the level you want to search in, a person's name, or object.
2) In the adjoining text box, type in the search string related to the selection in the list box.
3) Click the **Search** button and view the results in the Search Results grid.

Once a search is performed and the search results are displayed, they may be added to the Security/Auto Mail list. In this process, two things happen:

- The person will have access only to those organizational levels or people in the list.
- The person will be able to receive organizational reports via e-mail according to the organization level specified. To this end, you must have an e-mail address specified and the Exclude From Auto mail List check box not selected for the person to receive a report.

Creating a Fixed Charges Pool

The Fixed Charges Pool is a database of equipment or features (such as modems and call forwarding) and their monthly charges or credits. To create a Fixed Charges Pool, follow these steps:

1) At the Directory Database screen, select the **Options** menu.
2) Select the **Fixed Charges Pool…** menu item and the Fixed Charges dialog box will appear.
3) Click the **Add** button and a Create Fixed Charge dialog box appears.
4) Add an equipment type and its charge or credit and click **OK** (A credit should be entered as a negative amount, e.g., -5.00.).

EDITING THE FIXED CHARGES POOL

You can edit the Fixed Charges Pool at any time by following these steps:

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

After the updates are made, all extensions that use the edited Charge Type will reflect the change.

DELETING EQUIPMENT FROM THE FIXED CHARGES POOL

By clicking the **Delete** button in the Fixed Charges dialog box, you can remove any equipment type and its charge from the Fixed Charges Pool. However, before you can delete a piece of equipment, you must first inactivate it for each person that uses it.

- To inactivate an equipment charge from a person:

1) In the Directory Database screen, highlight the person from whom you want to remove equipment.
2) From the **Edit** menu, select the **Edit** menu item.
3) The Edit Person dialog box appears, and select the Fixed Charges tab.
4) Highlight the item you want to remove.
5) Click **Delete/Deactivate**, and an Expire On? dialog box appears.
6) Enter the time and date that you want the equipment removed.
7) Repeat these steps for every extension that you want to remove equipment from.

- After removing the equipment from every extension that uses it, follow these steps to remove the equipment from the Fixed Charges Pool:

1) From the Directory Database screen, select the **Options** menu.
2) Select the **Fixed Charges Pool…** menu item.
3) At the Fixed Charges dialog box, highlight the charges to be removed.
4) Click the **Delete** button.

Searching the Directory database

You can look up any extension, name, auth code, or organizational level in your Directory database by using the Find option under the Edit menu. To do this, open your Directory database and from the **Edit** menu select the **Find** menu item. A Search Organization Tree dialog box will appear.

1) Type the search string in the **Org (Last) Name or Extension** text box. You may enter a truncated search string.
2) Click the **Search** button, and your results will be displayed in the grid.
3) Double click on the line containing your desired result (a pound sign (#) will appear), and click the **Go To Selected** button.
4) The Search organization tree dialog box will close, and the system jumps to the retrieved search string in the Directory tree.