Quick Reference Guide: Directory Database for the Web

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

> **Note for the optional Facilities Management module:**
>
> If you purchased the Facilities Management module, you should be aware of the relationship between the Directory database and that module. This relationship is provided in Notes found in each relevant section.

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. From the **Language** list box, select the language that reports will appear in for everyone in the organizational level.

   Note: The **Language** list box may not appear in your system, and not all reports can be printed in other languages. 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

Note for the optional Facilities Management module:

When a new person is added from a service request in Facilities Management, that person's record is marked as such. The Directory Administrator can then access a listing from the Directory database and use the listing to complete/edit that person's record.

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

Note for the optional Facilities Management module:

If you purchased the optional Facilities Management module, creating a warehouse is very similar to adding a person. However, when creating a warehouse, you must click the **Flag This Person as an Inventory Warehouse** check box.

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.

Note for the optional Facilities Management module:

If you purchased the optional Facilities Management module, the email address you enter here will appear in Facilities Management for a technician. Any changes made in this text box will update Facilities Management as well. Conversely, if an email address for a technician is updated in Facilities Management, the Directory database will be updated.

Language: Select the language that certain reports will appear in for the current user.

> **Note:** The **Language** list box may not appear in your system, and not all reports can be printed in other languages.

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 List Box: Select the site where the user is physically located from the **Home Site** list box. If the number of home sites exceeds the maximum number defined at the ***Misc. System Options 1*** screen during installation, then a **Find Word(s)** text box and **Word Search** button will appear. There, perform a search for the data source, and the results will appear in the **Home Site** list box.

Find Word(s): Enter your search string in this text box. You don't have to enter an entire word, just a fragment. After entering a search string, Click the adjoining **Word Search** button, and the search results will include all values containing your search string.

For example, if you enter a search string of "at", your results will include the following: cathode, flat screen, gateway.

Word Search Button: Click this button to initiate the search. The results will display in the **Home Site** list box.

> **Note:** The **Home Site Search** text box and **Word Search** button will appear only if the number of home sites exceeds the maximum defined at the ***Misc. System Options 1*** screen during installation.

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.

Flag this person as an inventory "warehouse": Click this check box to specify that the current record is a warehouse.

> **Note for the optional Facilities Management module:**
>
> This check box appears only if you purchased the optional Facilities Management module.

- When clicked, the following will apply:
  - A warehouse cannot have any objects attached to it
  - A warehouse cannot have any fixed or one time charges attached to it
  - A warehouse can have a billing address assigned to it in the Billing Address tab in order to create shipping lists

- A warehouse can have phone numbers assigned to it at the Other Numbers tab
- The check box cannot be turned off if there is inventory in the warehouse
- The warehouse cannot be deleted if there is inventory in the warehouse

Room number: Type a valid room number in this text box. This text box appears only if you purchased the optional Hospitality 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.

> **Note for the optional Facilities Management module:**
>
> If you purchased the optional Facilities Management module, a warehouse cannot have any objects attached to it

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. Depending on the number of data sources defined during the installation process, one of the following will apply for the **Data Source** column:

    - If the number of data sources **is less** than the maximum number defined during installation, a **Data Source** list box will be displayed. From this list box, select a data source for each object for the current user.
    - If the number of data sources **exceeds** the maximum number defined during installation, then a **Look Up** button will appear. Click this button to display a ***Choose Data Source*** dialog box where you can perform a search for the data source. See below for more information on the ***Choose Data Source*** dialog box.

> **Note:** The default data source displayed will be the last one selected from the ***Choose Data Source*** dialog box.

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. Depending on the number of data sources defined during the installation process, one of the following will apply for the **Data Source** column:
   - If the number of data sources **is less** than the maximum number defined during installation, a **Data Source** list box will be displayed. From this list box, select a data source for each object for the current user.
   - If the number of data sources **exceeds** the maximum number defined during installation, then a **Look Up** button will appear. Click this button to display a ***Choose Data Source*** dialog box where you can perform a search for the data source. See below for more information on the ***Choose Data Source*** dialog box.

> **Note:** The default data source displayed will be the last one selected from the ***Choose Data Source*** dialog 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. Depending on the number of data sources defined during the installation process, one of the following will apply for the **Data Source** column:

   - If the number of data sources **is less** than the maximum number defined during installation, a **Data Source** list box will be displayed. From this list box, select a data source for each object for the current user.

   - If the number of data sources **exceeds** the maximum number defined during installation, then a **Look Up** button will appear. Click this button to display a ***Choose Data Source*** dialog box where you can perform a search for the data source. See below for more information on the ***Choose Data Source*** dialog box.

   > **Note:** The default data source displayed will be the last one selected from the ***Choose Data Source*** dialog 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

> **Note for the optional Facilities Management module:**
>
> A warehouse cannot have any fixed or one-time charges attached to it.

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 added 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 added 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.

Entering a Charge Manually

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.

Selecting a Charge From The One Time Charges Pool

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.

INVENTORY TABLE

The **Inventory** table details the inventory assigned to the current person's record. The information in this table cannot be edited.

Note: The **Inventory** table appears only if the optional Facilities Management module was purchased.

Other Numbers Tab

Note for the optional Facilities Management module:

If you purchased the optional Facilities Management module and clicked the **Flag This Person as an Inventory Warehouse** check box located in the General Information section, you can have phone numbers assigned at this tab to the warehouse.

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.

Note for the optional Facilities Management module:

If you purchased the optional Facilities Management module and clicked the **Flag This Person as an Inventory Warehouse** check box located in the General Information section, you can have a billing address assigned at this tab to the warehouse.

ADDING A USER THROUGH SERVICE REQUESTS

Note: This section applies only if you purchased the optional Facilities Management module.

When a new person is added from a service request in Facilities Management, that person's record is marked as such. The Directory Administrator can then access a listing from the Directory database and complete/edit that person's record there.

To access this listing, perform the following:

- From the **File** menu select **People Added Through Service Requests**.

ADDING A RANGE OF EXTENSIONS

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

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

1. In the ***Directory*** database screen, expand the level you want to add a person to until the symbol appears. Click on the symbol.
2. From the **Edit** menu, or by right clicking in the screen to display the pop-up menu, select **Add → Add Extension Range**, and the ***Add Item Range*** dialog box will appear.
3. Enter the first extension number in the **Start** text box.
4. Enter the last extension number in the **End** text box.
5. Assign the entire range of extensions to a billing class with the **Billing Class** list box.

   > **Note:** If you purchased the optional Hospitality module, the **Billing Class** list box will not appear. Instead, there will be a **Billing Description** list box. Use this list box to assign a billing description to the entire range.

6. With the **Data Source** list box, assign the entire range of extensions to a data source. If the number of data sources exceeds the maximum number defined at the ***Misc. System Options 1*** screen during installation, then a **Find Word(s)** text box and **Word Search** button will appear. There, perform a search for the data source, and the results will appear in the **Data Source** list box. Enter your search string in the **Find Word(s)** text box. You don't have to enter an entire word, just a fragment. After entering a search string, Click the **Word Search** button, and the search results will include all values containing your search string.

   For example, if you enter a search string of "at", your results will include the following: cathode, flat screen, gateway.

   > **Note:** The **Find Words** text box and **Word Search** button will appear only if the number of home sites exceeds the maximum number defined at the ***Misc. System Options 1*** screen during installation.

7. Click **OK**, and the extensions will appear in the Directory tree. You can now add data for each person. Please refer to the section below for information on adding data for each user.

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

> **Note for the optional Facilities Management module:**
>
> If you purchased the optional Facilities Management module and if you clicked the **Flag This Person as an Inventory Warehouse** check box located on the ***General*** tab, this check box cannot be turned off if there is inventory in the warehouse.

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

> **Notes on the Facilities Management module:**
>
> - Normally, when a person is inactivated, their extension(s) and fixed charge(s) will be purged according to the purge parameters defined. With Facilities Management however, if a person is inactivated that still has fixed charges assigned to their record, a message will appear informing you to contact the inventory manager to have the items returned to the warehouse thus removing them from the person's record.
> - If you clicked the **Flag This Person as an Inventory Warehouse** check box located in the ***General*** tab, the warehouse cannot be deleted if there is inventory in the warehouse.

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.

The search function is accessed from the **Edit** menu, or by clicking the  button. After selecting it, a ***Search*** screen will appear.

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

To search the Directory database, follow these steps:

1. Using the filter grid, define the search criteria for any or all of the field names. When a row is double clicked, a dialog box appears that lets you define an operator and search criteria specific to the field name in that row.

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

2. Using the **Sort Order** list boxes, specify how you want the results sorted by selecting a field name from each list box. The defaults are **Organizational Name** for **1st Sort**, **Last Name** for **2nd Sort** and **none** for **3rd Sort**.
3. Click the **Find** button, and your results will be displayed in the **Search Results** table. Depending on the field names searched, the results displayed will vary.
4. 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 ***Directory Database*** main screen.
5. Use the list boxes on the far right of the screen to sort the search results.

> **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. **Note for the optional Facilities Management module:** Using the ***Module Access*** tab, you can designate a user as a technician, as well as specify the user's Facilities Management access level.
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.
Summary Gates Access	With this tab, a System Administrator or users with Directory Administrative privileges assign the summary gates the current user can display in the Control Center. **Note:** The ***Summary Gates*** tab appears only when the Dashboard option is purchased.

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.

> **Note:** A caption indicating that one or more filter is turned on will appear next to the button bar on the ***Directory Database*** screen.

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 Site** list box, select a home site (or all home sites) to display in the organization tree. If the number of data sources exceeds the maximum number defined at the ***Misc. System Options 1*** screen during installation, then a **Find Word(s)** text box and **Word Search** button will appear. There, perform a search for the data source, and the results will appear in the **Home Site** list box. Enter your search string in the **Find Word(s)** text box. You don't have to enter an entire word, just a fragment. After entering a search string, click the **Word Search** button, and the search results will include all values containing your search string.

   For example, if you enter a search string of "at", your results will include the following: cathode, flat screen, gateway.

   > **Note:** The **Home Site Search** text box and **Word Search** button will appear only if the number of home sites exceeds the maximum number defined at the ***Misc. System Options 1*** screen during installation.

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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