Quick Reference Guide: Directory Database

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

> **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. To add a level, follow these steps:

There are two routes to adding an organization level:

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

These two methods are slightly different and are explained below.

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

1. At the ***Add "level"*** dialog box, enter a unique 30 character alphanumeric level name in the **Name** text box.
2. In the **Code** text box, enter a unique 20 character alphanumeric code for this level.
3. 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.

4. Enter the optional name and address information that will appear in a billing report.
5. Click the **Save** button.

-or-

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

ADDING A USER TO THE DIRECTORY DATABASE

> **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.

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

The ***Add Person*** screen is split into three tabs:

- **General / Objects –** This tab is used to add information such as name, and title, assign security settings, and assign an extension.
- **Charges** – This tab is used to assign and maintain fixed and one time charges. In addition, if the optional Facilities Management module was purchased, the details of the inventory assigned to the current person's record are displayed at this tab.
- **Other Info –** This tab is used to specify billing information and phone numbers.

> **Note for the optional Facilities Management module:**
>
> If you purchased the optional Facilities Management module, a fifth tab, ***Inventory Charges***, is displayed.

Adding Data to a User

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

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

GENERAL / OBJECTS TAB

The ***General / Objects*** tab includes information such as name (first and last), email address (used to send reports), billing class, directory import key, billing code, and room number (which is available if the Hospitality program has been purchased). There is also a check box to exclude the user from receiving “auto-mail” reports, which are reports that are automatically scheduled and emailed to a user.

Information for working with each of these controls follows:

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

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.

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

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

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

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

> **Note:** 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

Home Site: Select the site where the user is physically located from the **Home Site** list box. 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 **Find Word(s)** text box and **Word Search** button will appear only if the number of data sources exceeds the maximum number defined at the ***Misc. System Options 1*** screen during installation.

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

Language: From this list box, 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.

Billing Class: Use this list box to assign the user a billing class (default is Billing Class 1). This selection will determine which billing descriptions are used to price the user's calls.

> **Note:** If you purchased the optional Hospitality module, a **Billing Description** list box will appear instead of a **Billing Class** list box.

Objects Section

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

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

Adding an Object

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

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

Editing / Reactivating an Object

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

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

Deleting / Deactivating an Object

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

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

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.

This tab is divided into three sections:

- Fixed Charges
- One-Time Charges
- Inventory

Fixed Charges Section

> **Note for the optional Facilities Management module:**
>
> If you purchased the Facilities Management Module, fixed charges cannot be assigned to a warehouse.

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

Assigning Fixed Charges to a User

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

1. Click the **Add** button, and a ***Fixed Charges*** screen displaying all the charges and associated codes in a grid will appear.
2. Select a charge from the grid and click the **Apply** button.
3. A ***Fixed Charge Dates*** dialog box will appear, and perform the following:
   - The **Active On Date** text box will display the default date specified during the installation of the call accounting software. If you need to specify another date, enter it or click the **Calendar** button to select another. Enter the date in one of these formats: mmddyyyy, mm/dd/yyyy, or mm-dd-yyyy.

- The **Expires on Date** text box will be blank. If you leave it blank, the charge will never expire. If you need to specify an expiration date, enter it or click the **Calendar** button to select one. Enter the date in one of these formats: mmddyyyy, mm/dd/yyyy, or mm-dd-yyyy.

4. Click the **OK** button to apply the charge, and you will return to the ***Fixed Charges*** screen.
5. There, select another charge or click **Close** to return to the ***Add Person*** screen.

Editing/Removing Fixed Charges From a User

Setting an expiration date for the charge for each user the fixed charge is assigned to, inactivates a fixed charge. If you try and delete a fixed charge while it is still assigned to a user, an error message will appear informing you of this and instruct you to run a Fixed Charges listing to see who is still using the fixed charge.

The **Edit/Inactivate** button is used to Inactivate the fixed charge. The reason for inactivating a fixed charge is, for example, after assigning a fixed charge to a user, you want to make sure that user is not charged a second time. To illustrate, a user is assigned a fixed charge of $5.00 for the use of Caller ID that was set up on April 15. A monthly report for this user is run on May 2 with the fixed charge incurred. To make sure this user is not charged twice, an expiration date before the next time the report is run is placed on the fixed charge.

To remove a fixed charge, follow these steps:

1. At the main ***Directory*** screen, expand the organization tree until the level containing the user you want to edit is displayed.
2. Select the organization, and then select the user's name in the right pane of the main ***Directory*** screen.
3. Click the **Edit** button, and an ***Edit*** screen containing that user's information will appear. This screen is similar to the one used for adding a user.
4. Click the ***Charges*** tab, select the charge, and click the **Edit/Inactivate** button.
5. 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

One Time Charges Section

> **Note for the optional Facilities Management module:**
>
> If you purchased the Facilities Management Module, one-time charges cannot be assigned to a warehouse.

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

The One Time Charges Pool is a database of common non-recurring events (such as moving a phone) and their one-time charges or credits. While adding or editing a user, you can add to their record the charge for the use of the special equipment or features.

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

Entering a Charge Manually

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

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

Select a Charge From the One Time Charges Pool

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

Editing a One Time Charge

1. At the main ***Directory*** screen, expand the organization tree until the level containing the user you want to edit is displayed.
2. Select the level, and the user's record will appear in the right pane of the main ***Directory*** screen.
3. Click the **Edit** button, and an ***Edit*** screen containing that user's information will appear. This screen is similar to the one used for adding a user.
4. Click the ***Charges*** tab, select the charge, and click the **Edit** button.
5. An ***Edit One Time Charge*** screen will appear. There, make the desired changes, and click **OK.**

Deleting a One Time Charge

1. At the main ***Directory*** screen, expand the organization tree until the level containing the user you want to edit is displayed.
2. Select the level, and the user's record will appear in the right pane of the main ***Directory*** screen.
3. Click the **Edit** button, and an ***Edit*** screen containing that user's information will appear. This screen is similar to the one used for adding a user.
4. Click the ***Charges*** tab, select the charge, and click the **Delete** button.
5. At the ***Confirm Delete*** message box, click **Yes**.

Inventory Charges Section

> **Note for the optional Facilities Management module:**
>
> The **Inventory Charges** section will display only if you purchased the optional Facilities Management module.

This section displays all the inventory assigned to a person and cannot be edited.

Column	Details
Part Number	This column displays the part number of the item(s) assigned to the current user.
Description	This column displays the description for the inventory item(s) assigned to the current user.
Serial Number	This column displays the serial number of the item(s) assigned to the current user.
Quantity	This column displays the quantity of the item(s) assigned to the current user.
Charge	This column displays the cost per item for the item(s) assigned to the current user.
Expires	This column displays the date a fixed charge becomes inactive. If it is blank, the item does not produce a fixed charge.

OTHER INFO TAB

The left-hand section of the ***Other Info*** tab lets you add billing address information, and the right-hand section lets you enter additional phone numbers.

Billing Address Section

The **Billing Address** section allows you to add a name and address for the person that will appear in the Tenant Billing Report.

Enter the information in the appropriate text boxes.

Name: Enter the tenant's name in this text box. There is a maximum of 50 alphanumeric characters.

Address1: Enter the first line of the tenant's address in this text box. There is a maximum of 50 alphanumeric characters.

Address2: Enter the second line of the tenant's address in this text box. There is a maximum of 50 alphanumeric characters.

City: Enter the tenant's city in this text box. There is a maximum of 20 alphanumeric characters.

State: Enter the tenant's state in this text box. There is a maximum of 2 alphabetic characters.

Zip: Enter the tenant's zip code in this text box. There is a maximum of 10 alphanumeric characters.

Other Numbers Section

The **Other Numbers** section stores a directory of useful information about the person, including home, car, fax, pager, direct inward dialing (DID), and other numbers.

> **Note:** The numbers listed in this section are for reference only and do not appear in any reports.

Enter each number in the appropriate text box.

Home: Enter this person's home phone number in this text box. There is a maximum of 26 characters.

Car: Enter this person's mobile phone number in this text box. There is a maximum of 26 characters.

Fax: Enter this person's fax number in this text box. There is a maximum of 26 characters.

Pager: Enter this person's pager number in this text box. There is a maximum of 26 characters.

Data: Enter this person's data number in this text box. There is a maximum of 26 characters.

DID: Enter this person's DID number in this text box. There is a maximum of 26 characters.

User Def 1: Your organization can select what type of information to keep in this text box. There is a maximum of 50 characters.

User Def 2: Your organization can select a second type of information to keep in this text box. There is a maximum of 50 characters.

Alternate: Enter an alternate number to identify the person, such as an employee ID number. The alternate number is optional, and there is a maximum of 50 characters.

EDITING THE DIRECTORY DATABASE

Editing an Organization Level

To edit an organization level, follow these steps:

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

Editing a User

> **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 Information section, 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. Select a user, and click the button next to the user whose record you want to edit.
4. An ***Edit Person*** screen containing that user's information will appear. This screen is similar to the one used for adding a user.
5. Perform the edits and click **OK** to save the changes.

DELETING FROM THE DIRECTORY DATABASE

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

Deleting a Single Level

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

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

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

Deleting Multiple Levels

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

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

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

1. In the database tree, highlight each level in the right window by clicking on it while holding down the **Ctrl** key.

2. Click the ☒ button, or press the **Del** key.
3. A Confirm Delete message appears. Click **Yes To All** to delete all selected levels at once, **Yes** to delete each level individually, or **No**.

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

Deleting a User

> **Notes for the optional 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 Information** section, 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.

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

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

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

To delete a user, follow these steps:

1. In the left pane of the main ***Directory Database*** screen, highlight the level containing the user you want to delete.
2. In the right pane of the main ***Directory Database*** screen, select the check box next to the user or users you want to delete.
3. From the **Edit** menu, select **Delete**, or click the ☒ button.
4. Click **OK** at the message box.
5. If you are deleting more than one user, click **Yes** to delete each selection individually, or click **Yes to All** to delete all your choices at the same time.

DIRECTORY SECURITY SCREEN

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

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

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

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 Organization Tree*** dialog box will appear.

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

Find: Click this button to initiate the search. The results will display in a table. See below for more information on the **Search Results** table.

Go to: After selecting a search result, click this button to be taken to the selected level in the ***Directory Database*** main screen.

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

On the far right of the screen are three list boxes. These are used to sort search results.

1st Sort: From this list box, select the field name that the search results will be primarily sorted on. The default is Organization Name.

2nd Sort: From this list box, select the field name that the search results will be sorted on second. The default is Last Name.

3rd Sort: From this list box, select the field name that the search results will be sorted on third. The default is None.

To search the Directory database, follow these steps:

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

1. 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.

MOVING USERS FROM DEPARTMENT TO DEPARTMENT

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

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

- To move one user, follow these steps:

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

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

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

UNDEFINED EXTENSIONS

Adding an Undefined Extension

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

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

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

Assigning Undefined Extensions to the Correct Departments

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

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

ISI Telemanagement Solutions, Inc., Inc.

1051 Perimeter Drive
Suite 200
Schaumburg, IL 60173
Phone: (847)995-0002
Fax: (847)995-0003
www.isi-info.com