

Tiger Prism User Guide

Directory Module - Release 2018.R2



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ii Directory

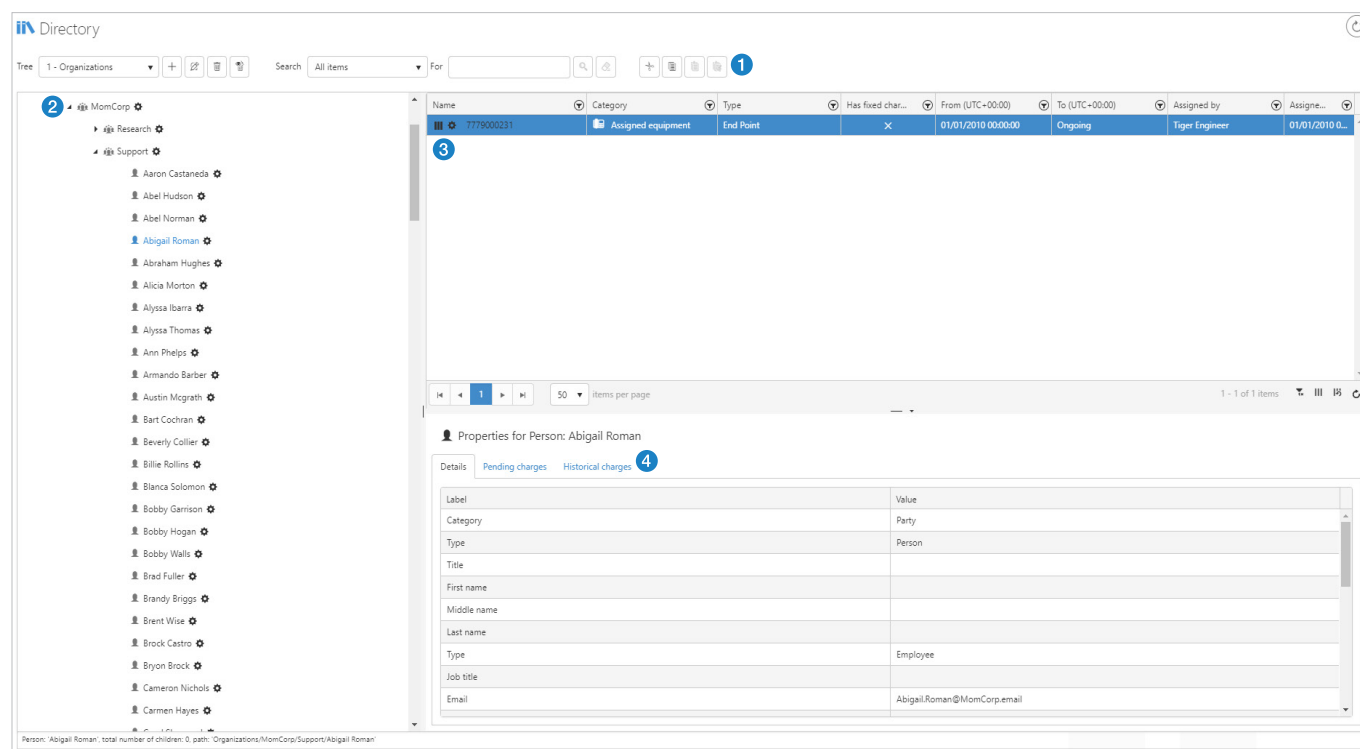
Overview

To access the Directory module, either click on the Directory tile on the home page, or click on the Modules drop down, and select Directory. Once in the Directory Module, dependant on your user rights, you will be able to view, add, edit, and remove items in the Tree structure. This section of the document will guide you through several areas of creating and maintaining the Tree structures.

Note: If your installation uses the Directory Integration module for populating your Tree(s), you will only use the Directory module for reference of the integrated Tree(s). Changes and updates will need to be made to the external source.

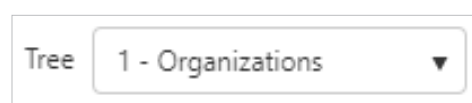
Screen Explanation


The Directory screen is split into 4 sections.







- The Menu Bar (1)
- The Tree Pane (2)
- The Child Items Pane (3)
- The Details Pane (4)

From the Menu Bar, the Tree list allows the user to switch between different configured Trees.



- ▶ The 'Create Tree' button  allows for the creation of a new Tree. Enter the new Tree name, and click Create or Cancel as required.

i Note: It is only possible to create a Tree with a unique name. Previously deleted Tree names cannot be used as they still contain history, and may be restored. System Administrators can control the maximum number of allowed trees through System Settings.
- ▶ The 'Edit Tree' button  allows for the updating of an existing Tree name. Edit the Tree name, and click Save or Cancel as required.
- ▶ The 'Delete Tree' button  allows for the removal of an existing Tree. In the Confirm Delete window, click Confirm or Cancel as required.
- ▶ The 'Include Deleted' button  allows for the inclusion of previously deleted Trees in the Tree drop down list. When active, all previously deleted Trees will become visible within the Tree drop down list.
- ▶ The 'Restore Tree' button  allows for the restoration of previously deleted Trees within the Tree drop down list. When a previously deleted Tree is selected from the Tree drop down list, this icon will become active, and allow the restoration of the selected Tree. A confirmation window will appear, and you are prompted to click Confirm to restore the Tree.

The Search option allows you to focus the search across all items or a particular group, for example, Organizations, People, etc. Type your search criteria into the white text box, and click on the 'Search' button, or the 'Clear' button to clear the box.



These buttons allow for Cut, Copy, Paste, and Clear clipboard operations on items selected in the Child Items Pane.



i Note: See section below for an overview of Copy and Move operations.

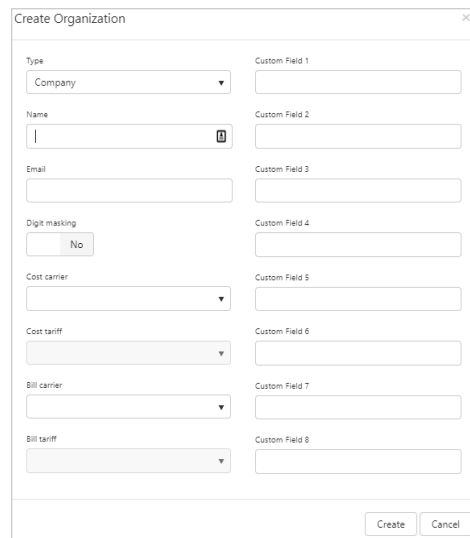
The Tree pane will display the Tree structure chosen from the Tree drop down list. The Tree can contain a number of levels, e.g., Company, Division, Department, Teams, and also People.

Create Nodes

From within this pane, you can create an organization or a person. To do this, click on the Cog ⚙ against the required parent item, choose Add, then Organization or Person. This will open a new window.

Add Organization

If you choose to add an Organization:



- ▶ Select the appropriate Type from the drop-down selection.
- ▶ Digit Masking allows a number of digits to be masked for any dialled number / CLI for privacy reasons.
- ▶ Use the drop-down arrow to select a Cost Carrier already set up on the system.
- ▶ Use the drop-down arrow to select a Cost Tariff already set up on the system.
- ▶ Use the drop-down arrow to select a Bill Carrier already set up on the system.
- ▶ Use the drop-down arrow to select a Bill Tariff already set up on the system.
- ▶ There are up to 8 customisable fields, for which titles need to be configured in the Setup—System menu. These fields are free text.
- ▶ Click Create once completed.

Add Person

If you choose to add a Person, you will be presented with a list of Persons already added to the system. You can either select the Person item(s) you wish to import, and choose the 'Add Selected' button, or click on the 'Add New Person' button if one does not already exist on the system. If the Person has not been created yet, this can be done in the [Security](#) module, or use the Add New Person option in the bottom left of the window.

Select the Person item(s), and click the 'Add Selected' button.

The new Person item(s) will now appear in both the Tree Pane and Child Items Pane.

Add Person
✕

	First name	Last name	Type	Job title	Email	Employee Id	Payroll No.
<input type="checkbox"/>			Contact				
<input type="checkbox"/>			Employee				
<input type="checkbox"/>	System	Administrator	Employee				
<input type="checkbox"/>	Dominic	Black	Employee	Head of Custome...			
<input type="checkbox"/>	Jane	Brown	Employee	Customer Service...			
<input type="checkbox"/>	Ryan	Clark	Employee				
<input type="checkbox"/>	Kachazny	Grumplewhit	Employee	Carer	grumplewhitk@tigercom...		
<input type="checkbox"/>	Bill	Jarrett	Employee		bill.jarrett@tigercomms.c...		
<input type="checkbox"/>	Dean	Jeanes	Employee		dean.jeanes@tigercomm...		

◀ 1 ▶

50 items per page

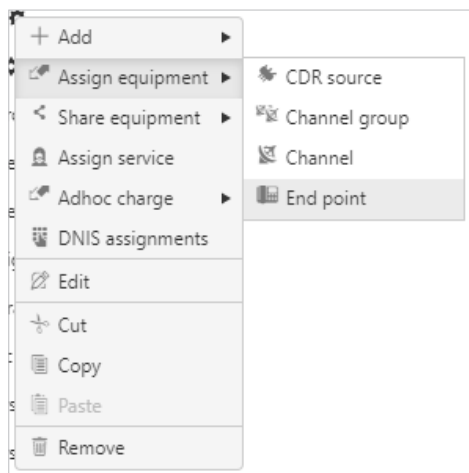
1 - 13 of 13 items

Note: A Person can only appear in any Tree once. An action that would result in a duplicate will fail.

Assignments

Assign End Point

Click on the Cog  against a Person, and choose Assign Equipment and End Point.



The Assign End Point window will allow you to select an End Point to be assigned to the Person.

Note: you can add more than one End Point to a Person.

- ▶ Product
- ▶ Whether Digit masking applies
- ▶ Region
- ▶ CDR source
- ▶ Whether it is ex-Directory
- ▶ Cost carrier
- ▶ Tenant
- ▶ Type
- ▶ Cost tariff
- ▶ End Point number
- ▶ Operator Position
- ▶ Bill carrier
- ▶ Description
- ▶ Country
- ▶ Bill tariff
- ▶ Serial number
- ▶ Location
- ▶ Custom Fields 1 - 9

Assign Existing End Point

Select the End Point numbers you wish to assign, and click 'Next'.

Assign Existing End Point
✕

Selected End Points: 0
Clear selected

	Country	Location	Region	Type	End point number	Serial number	Product
<input type="checkbox"/>	United Kingdom	Ringwood	Europe	Extension	*140		Default I
<input type="checkbox"/>	United Kingdom	Ringwood	Europe	Extension	*153		Default I
<input type="checkbox"/>	United Kingdom	Ringwood	Europe	Extension	*71		Default I
<input type="checkbox"/>	United Kingdom	Ringwood	Europe	Extension	*72		Default I
<input type="checkbox"/>	United Kingdom	Ringwood	Europe	Extension	*73		Default I
<input type="checkbox"/>	United Kingdom	Ringwood	Europe	Extension	*75		Default I
<input type="checkbox"/>	United Kingdom	Ringwood	Europe	Extension	*77		Default I
<input type="checkbox"/>	United Kingdom	Ringwood	Europe	Extension	110		Default I
<input type="checkbox"/>	United Kingdom	Ringwood	Europe	Extension	1212		Default I

⏪
⏴

1

2

3

4

5

...
⏵
⏩

50
items per page

1 - 50 of 5060 items
⌵
⌵
🔄

Assign new end point

Is charged?
Yes

Assign selected end points
Cancel

Click 'Assign'.

Assign New End Point

If the Phone has not yet been created select 'New' from the Assign options. Complete each field to define:

Assign New End Point
✕

Product: Default End Point

CDR source: Fixed Voice

Tenant:

End point number:

Description:

Serial number:

Has digit masking: No

Is in-directory: No

Type: Extension

Operator position:

Country: United Kingdom

Location: Ringwood

Region: Europe

Cost carrier:

Cost tariff:

Bill carrier:

Bill tariff:

VoiceMail Number:

Custom Field 2:

Custom Field 3:

Custom Field 4:

Custom Field 5:

Custom Field 6:

Custom Field 7:

Custom Field 8:

Assign existing end point

Is charged?
Yes

Create and assign end point
Cancel

The End Point will now be assigned to the Person in the Tree, but will not appear in the Tree Pane. End Points are only visible in the Child Items Pane on the right.

The screenshot shows the 'Directory' application interface. On the left is a tree view under 'MomCorp' with a sub-tree for 'Support'. The main area displays a table of users with columns for Name, Category, Type, Has fixed char..., From (UTC-00:00), To (UTC-00:00), Assigned by, and Assigne... The table lists 15 users, all categorized as 'Party' and 'Person'. Below the table is a 'Properties for Organization: Support' section with tabs for 'Details', 'Pending charges', and 'Historical charges'. The 'Details' tab is active, showing a table with fields: Label, Category, Type, Subtype, Name, and Email, with corresponding values.

Ad hoc Charges

To apply a one-off credit or debit to an item, choose Raise credit note or raise debit note from the Cog .

Complete the form with the details required, including the date that the note should apply on.

The screenshot shows the 'Create Fixed Charge' form. It contains several input fields and dropdown menus:

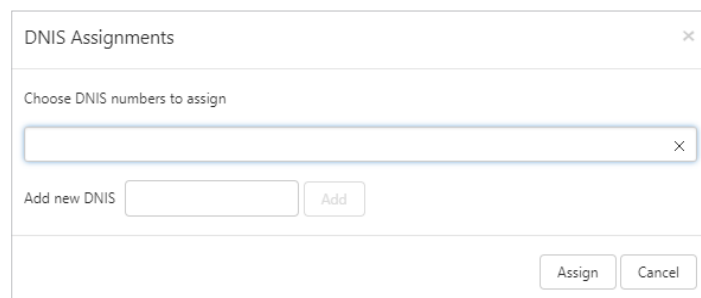
- Template:** None
- Currency:** Pound Sterling (GBP)
- Name:** (empty text field)
- Time zone:** (UTC+00:00) Dublin, Edinburgh, Lisbon, London
- Description:** (empty text area)
- Rate:** 0.0000
- Rate includes tax:** Yes (checked)
- Tax 1:** None
- Tax 2:** None
- Tariff:** Bill
- Transaction type:** Credit
- Charge date:** 31/07/2018 15:58

At the bottom right, there are 'Create' and 'Cancel' buttons.

For more details on Fixed Charges, see the [Network](#) section of the manual.

DNIS Assignments

To apply DNIS numbers to an Organization, click on the Cog ⚙ against the item, and choose DNIS assignments.

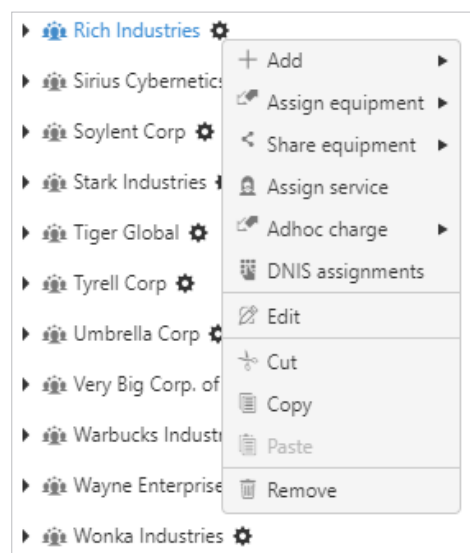


You can define DNIS numbers in the [Telephony](#) module, or you can add new ones through the assignment dialogue here.

Editing Entries

Editing items in the Tree View

To edit the properties of an Organization or Person, click on the Cog ⚙ against the item, and choose the Edit option. An Edit window will open. Click the Save option or Cancel to discard any changes you have made.



Move an Organization or Person

Click the Cog ⚙ against the Organization (or Person) you wish to move, and choose the Cut option. Navigate to the location you wish to move the Organization (or Person) to, select the Cog ⚙ against the Organization (or Person) you wish the items to sit below, and choose Paste. A Confirm Move window will appear asking you to confirm your action.

Note: You may also move items within the Tree Pane, by dragging and dropping them.

Copy an Organization or Person

Click the Cog ⚙ against the Organization or Person you wish to copy, choose the Copy option. Navigate to the location you wish to copy the Organization or Person to, select the Cog ⚙ against the Organization or Person you wish the items to sit below, and choose Paste. A confirm copy window will appear asking you to confirm your action.

Note: A Person or an assigned End Point may only appear in a Tree once. Any action that would result in a duplicate will fail.

Remove an Organization or Person

To remove an Organization or Person from the Tree, click on the Cog ⚙ against the Organization, or Person you wish to remove, and choose the Remove option. A message will appear asking you to confirm the action.

Child Item Pane

The Child Items pane displays the child items of the currently selected Item in the Tree pane. From the Child Items pane, you can Edit the Item, Move, Copy, and Remove, using the Cog ⚙ against the Item in the same way as the tree pane.

Name	Category	Type	Has fixed char...	From (UTC+00:00)	To (UTC+00:00)	Assigned by	Assigne...
☰ + Add	Party	Person	×	01/01/2010 00:00:00	Ongoing		
☰ Assign equipment	Party	Person	×	01/01/2010 00:00:00	Ongoing		
☰ Share equipment	Party	Person	×	01/01/2010 00:00:00	Ongoing		
☰ Assign service	Party	Person	×	01/01/2010 00:00:00	Ongoing		
☰ Adhoc charge	Party	Person	×	01/01/2010 00:00:00	Ongoing		
☰ DNIS assignments	Party	Person	×	01/01/2010 00:00:00	Ongoing		
☰ Data privacy	Party	Person	×	01/01/2010 00:00:00	Ongoing		
☰ Edit	Party	Person	×	01/01/2010 00:00:00	Ongoing		
☰ Select all	Party	Person	×	01/01/2010 00:00:00	Ongoing		
☰ Cut	Party	Person	×	01/01/2010 00:00:00	Ongoing		
☰ Copy	Party	Person	×	01/01/2010 00:00:00	Ongoing		
☰ Paste	Party	Person	×	01/01/2010 00:00:00	Ongoing		
☰ Remove	Party	Person	×	01/01/2010 00:00:00	Ongoing		
☰ ⚙ Beverly Collier	Party	Person	×	01/01/2010 00:00:00	Ongoing		

1 - 50 of 158 items

Use the 'Show / Hide Columns' button ☰ to select what columns of data to display / hide within the Child items window.

Name	Category	Type	Has fixed char...	From (UTC+00:00)	To (UTC+00:00)	Assigned by
☰ ⚙ Aaron Castaneda	Party	Person	×	01/01/2010 00:00:00	Ongoing	
☰ ⚙ Abel Hudson	Party	Person	×	01/01/2010 00:00:00	Ongoing	
☰ ⚙ Abel Norman	Party	Person	×	01/01/2010 00:00:00	Ongoing	
☰ ⚙ Abigail Roman	Party	Person	×	01/01/2010 00:00:00	Ongoing	
☰ ⚙ Abraham Hughes	Party	Person	×	01/01/2010 00:00:00	Ongoing	
☰ ⚙ Alicia Morton	Party	Person	×	01/01/2010 00:00:00	Ongoing	
☰ ⚙ Alyssa Ibarra	Party	Person	×	01/01/2010 00:00:00	Ongoing	
☰ ⚙ Alyssa Thomas	Party	Person	×	01/01/2010 00:00:00	Ongoing	
☰ ⚙ Ann Phelps	Party	Person	×	01/01/2010 00:00:00	Ongoing	
☰ ⚙ Armando Barber	Party	Person	×	01/01/2010 00:00:00	Ongoing	
☰ ⚙ Austin Mcgrath	Party	Person	×	01/01/2010 00:00:00	Ongoing	
☰ ⚙ Bart Cochran	Party	Person	×	01/01/2010 00:00:00	Ongoing	
☰ ⚙ Beverly Collier	Party	Person	×	01/01/2010 00:00:00	Ongoing	

1 - 50 of 158 items

Data Privacy

If you have the correct access rights, the option to initiate anonymisation for a Person through the [Data Privacy](#) module is on the Cog menu ⚙.

► To find out more about the Tiger Solution go to www.tigercomms.com