

Enterprise \ Directory

Overview

Prism's directory contains three independent trees. By default, these are set as Departments, Cost Centres, and Projects, although these labels can be changed. There is no functional difference between the three trees, they can be configured to represent whatever organisational views suit your business.

Each view consists of Organizations, built into a hierarchical tree. These Organizations can have endpoints assigned to them, and those endpoints can also be assigned to employees. This all contributes to the tree showing a view of organizations (1) with endpoints (2) and people (3) shown against each.

The screenshot displays the Tiger Prism interface for the Enterprise Directory. On the left, a navigation sidebar shows a tree of organizations under the 'Department' view, with 'Grocery' highlighted (1). The main area shows a table of endpoints (2) with columns for 'End point name', 'End point ty...', 'Owner', 'From', and 'To'. The 'Owner' column is highlighted (3). The table lists various endpoints and their associated owners and dates. At the bottom, there is a pagination control showing '1 - 18 of 18 Items'.

These directory assignments are reflected in analytics, reports and dashboards throughout the rest of Prism.

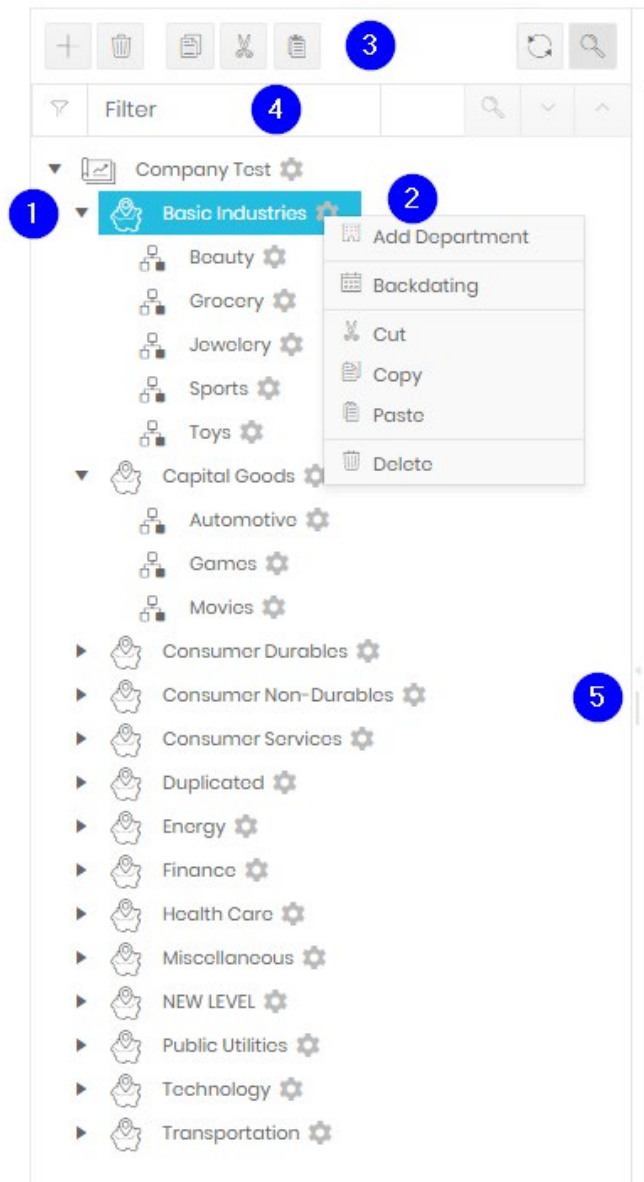
Related sections

Due to the nature and complexity of the directory there are many other sections of the manual which may need to be referred to while reading through this one. Creation and management of employees, endpoints, authorisation codes, number groups, fixed charges, and tariffs are all needed for the items assigned in the organization trees.

Elements of the Directory

Organization tree

The left-hand section of the directory screen consists of the selected tree. This serves as a visual guide to the hierarchy but is also the means of navigation around the tree.



The basic items on the tree represent the organizations (departments, cost centres or projects).

Branches can be expanded or collapsed by clicking the arrow on the left of the item (1).

Clicking the cog on the right of an organization opens the action menu (2).

The controls across the top (3) are, in order: Add an organization as a descendant of the selected item, Delete the selected organization, Copy the selected organization, Cut the selected organization, Paste the Organization copied or cut below the selected Organization, Refresh the current view, and show/hide the search (filter) bar (4).

On the right border are two controls, the arrow opens or closes the pane, the border itself allows resizing. Double clicking the border also open/closes the pane.

Finally, you can click and drag an organization to move it elsewhere in the directory.

Details display

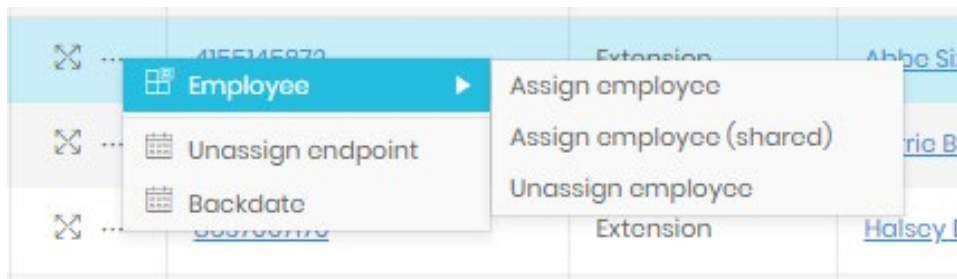
The right-hand side is used for showing the assignments and properties of the organization selected in the tree via a series of tabs.

Endpoint list

For grid controls see common features

Endpoint n.	Endpoint type	Employee	From	To	Organization	From	To	Has fixed...
6478748833	Extension	Adolind Wood	18/06/2020 09:08:11	Ongoing	Company Test/Basic Industries/Beauty	01/08/2019 00:00:00	Ongoing	×
286280888	Extension	Aida Lehtrange	01/06/2020 00:00:00	Ongoing	Company Test/Basic Industries/Beauty	01/08/2019 00:00:00	Ongoing	✓
758139888	Extension	Annaliese Olyvet	01/04/2020 00:00:00	Ongoing	Company Test/Basic Industries/Beauty	01/04/2020 00:00:00	Ongoing	✓
5844854884	Extension	Briana Boddram	04/06/2020 12:32:50	Ongoing	Company Test/Basic Industries/Beauty	01/08/2019 00:00:00	Ongoing	✓
60067	Hunt Group	Carlen Bricknall	01/05/2020 00:00:00	Ongoing	Company Test/Basic Industries/Beauty	01/08/2019 00:00:00	Ongoing	×
60047	Hunt Group	Farand Flow	11/06/2020 15:58:42	Ongoing	Company Test/Basic Industries/Beauty	01/08/2019 00:00:00	Ongoing	×
2883763504	Extension	Farand Flow	04/06/2020 12:32:50	Ongoing	Company Test/Basic Industries/Beauty	01/08/2019 00:00:00	Ongoing	✓
4205124889	Extension	Gabrielle Craiker	04/06/2020 12:32:50	Ongoing	Company Test/Basic Industries/Beauty	01/08/2019 00:00:00	Ongoing	×
688727245	Extension	Junior Baumlir	04/06/2020 12:32:50	Ongoing	Company Test/Basic Industries/Beauty	01/08/2019 00:00:00	Ongoing	×
5262889560	Extension	Jewel Jantje	04/06/2020 12:32:50	Ongoing	Company Test/Basic Industries/Beauty	01/08/2019 00:00:00	Ongoing	✓
188329748	Extension	Joby Dronsfield	18/06/2020 09:08:11	Ongoing	Company Test/Basic Industries/Beauty	01/08/2019 00:00:00	Ongoing	×
60007	Hunt Group	Leontine Craiker	11/06/2020 15:58:42	Ongoing	Company Test/Basic Industries/Beauty	01/08/2019 00:00:00	Ongoing	×
670389004	Extension	Leontine Craiker	04/06/2020 12:32:50	Ongoing	Company Test/Basic Industries/Beauty	01/08/2019 00:00:00	Ongoing	✓
772788301	Extension	Martelle Mulyany	04/06/2020 12:32:50	Ongoing	Company Test/Basic Industries/Beauty	01/08/2019 00:00:00	Ongoing	✓
9158820840	Extension	Phil Tonbridge	01/04/2020 00:00:00	Ongoing	Company Test/Basic Industries/Beauty	01/04/2020 00:00:00	Ongoing	×

1. This tab shows all endpoints assigned to the selected organization and its descendants. The endpoint name (eg extension number or URI email) shown followed by three additional groups of fields.
2. The employee group shows the endpoint’s current assignment to an employee, along with the date and time that the assignment started and when the assignment is due to end (or ongoing if no end is set).
3. The organization group shows the same set of information for the endpoint’s organization assignment.
4. The last column displayed indicated whether the endpoint has fixed charges assigned to it.
5. Each row has a move handle, click and hold briefly before dragging the endpoint to another organization, and an endpoint menu which allows assignments and backdating.



6. By default, Prism shows the endpoints of the selected organization and those assigned to all descendant organizations in the branch. The Show all children slider toggles this behaviour with just showing the endpoints directly assigned to the organization selected.
7. Endpoints can be shared by both organizations and employees. The Owned/Shared slider toggles whether the display shows endpoints which are owned by the selected organization or have a shared assignment where another organization is the owner.
8. Endpoints can be assigned (or created and assigned)

- This control toggles row selection which allows granular moves, unassignments and backdating. Once at least one endpoint is selected additional controls are displayed.

		End point name	End point ty...	Employee	
				Owner	From
<input checked="" type="checkbox"/>	⊗ ...	4155145872	Extension	Abbe Sizzey	01/05/2020 08:...
<input type="checkbox"/>	⊗ ...	6259977061	Extension	Barrie Bucy	04/06/2020 12:...

- If the selected organization owns an endpoint, but shares it, an indicator will show on the left. Clicking the arrow will open/close the sharing detail.

		End point name	End point ty...	Employee		
				Owner	From	To
▼	⊗ ...	6475749183	Extension	Adolind Wood	18/06/2020 09:08:11	12/07/2020 00:00
Shared Ownership						
		From	To	Employee		
		24/06/2020 00:00:00	Ongoing			
		08/06/2020 10:26:25	Ongoing	Abbe Sizzey		
		08/06/2020 10:26:25	09/06/2020 14:47:09	Abba Byrkmyr		
⏪ 1 ⏩						
		⊗ ...	2182180898	Extension	Aida Letrange	01/06/2020 00:00:00 Ongoing

Authorization codes

Authorization codes are created and managed their own section (Network \ Misc) but can be assigned to employees and organizations. The Authorization Codes tab shows any assignments for the selected organization. The layout of the display is very similar to that for endpoints.

		Authorization code	Employee			Organization		
			Owner	From	To	Path	From	To
⊗ ...		45871	Andreas Olvat	01/01/2000 00:00:00	Ongoing	Company Test/Basic Industries/Bc...	24/06/2020 00:00:00	Ongoing

Details

The details tab allows configuration of several organization properties.

Department Details

Organization Name: Beauty

Email: [Field]

Current retail tariff: [Field]

Current wholesale tariff: [Field]

Current fixed charge: £1 a day (Rental)

Quantity (fixed charge): 1

Organization name reflects what is shown in the tree and in reporting.

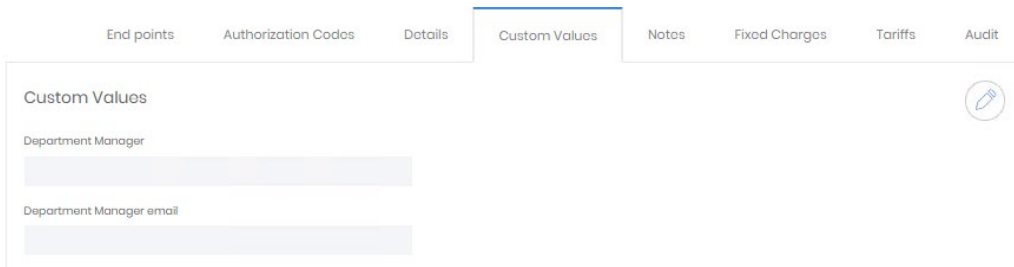
Email is a configured address for bulk reporting (see Scheduled Jobs).

Current and Wholesale tariffs can be assigned on their own tabs, but the currently applied tariffs are shown here.

Active fixed charges are displayed as well. These can be assigned or edited on their own tab.

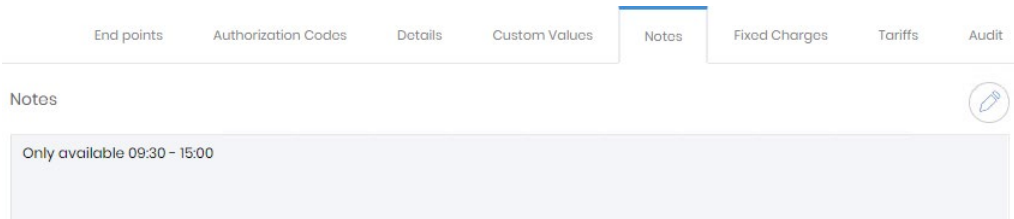
Custom Values

The custom values tab shows any custom fields that the system administrator has made available in [Settings](#).



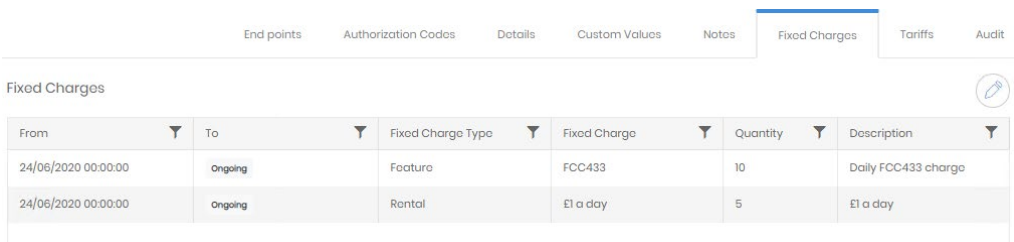
Notes

This tab allows for Notes to be added on the Organization. This is free, formatted text and can include links, tables, and pictures.

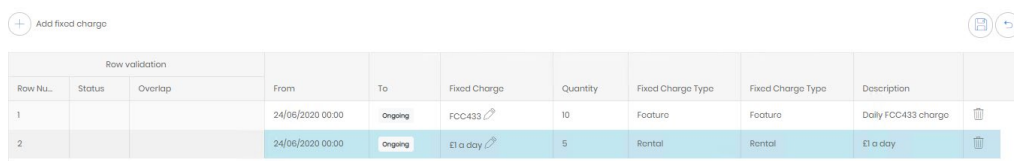


Fixed Charges

All current and past fixed charge assignments for the organization are detailed here.



Existing charges can be edited to change the quantity applied, the start date or the end date of the charge application.



New charges can be added here, but those charges must be defined first in the Fixed Charges section (Configuration \ Charging). When adding a charge here, the user is presented with a list of defined Rental, Maintenance, Feature and Service charges to choose from.

Select Fixed Charge...



Type	Name	Description
Rental	£1 a day	£1 a day
Maintenance	Engineer Fee	Fee for the Cluster upgrade
Feature	FCC433	Daily FCC433 charge
Service	Handset	DECT handset monthly charge
Rental	Monthly Rental	Office space
Rental	System Rental	System Rental - Split between departments

1 - 6 of 6 items
50 Items Per Page

Once the charge is selected the start/end dates can be edited but the quantity of charges (for example one charge per handset) must be entered.

Tariffs

Individual organizations can have wholesale or retail tariffs applied to them. These will apply to the organization and any descendants, though the setting may be overridden by tariff assignments on specific endpoints or descendant organizations.

End points
Authorization Codes
Details
Custom Values
Notes
Fixed Charges
Tariffs
Audit

Wholesale Tariff
Retail Tariff

From	To	Tariff	Description	Created By	Created
01/01/2020 00:00:00	Ongoing	Tiger Free	Tiger Free	Piers Anderson	24/06/2020 11:25:38

For more detail on tariffs see the section (Configuration \ Charging \ Tariffs).

Audit

The final tab shows the creation details for the organization, and the history of the record's directory positions as moves and changes occur.

End points
Authorization Codes
Details
Custom Values
Notes
Fixed Charges
Tariffs
Audit

Audit

Created By: Importer

Created (GMT Standard Time): 04/06/2020 12:32:51

Tree History

Parent organization	From	To
Company Test/Technology/Transportation	01/01/2020 00:00:50	Ongoing
Company Test/Transportation	01/06/2019 00:00:00	01/01/2020 00:00:50

Assignment

There are two terms that have been used several times so far, assignment and backdate.

Assignment

Endpoints, tariffs, authorisation codes and fixed charges are all assigned to one record or another.

When one record is assigned to another it will always have a start date and time. This is how Prism creates historically accurate reporting. When you assign a record or property to something you will usually have the option to override the default start time (which will always default to the current date and time). For example if you add a fixed charge to a department on the 4th of the month, you can change the start date to show as midnight on the 1st, this ensures that costs will line up with the required dates for billing.

You can also use this to prepare for future changes. For example, if a new tariff comes into effect at the beginning of the next month, you can set that as the start date. The existing tariff assignment will continue up to that point, then Prism will switch over at the specified time.

Row Nu.	Status	Overlap	From	To	Carrier	Tariff
1	New		01/07/2020 00:00	Ongoing	BT	Stanc
2			01/01/2020 00:00	Ongoing	Tiger	Tiger

Most records will have somewhere to show a history of their assignments, or what has been assigned to them. This allows you to check how things were configured at any point in time. Assignments are covered in more depth in Common Features

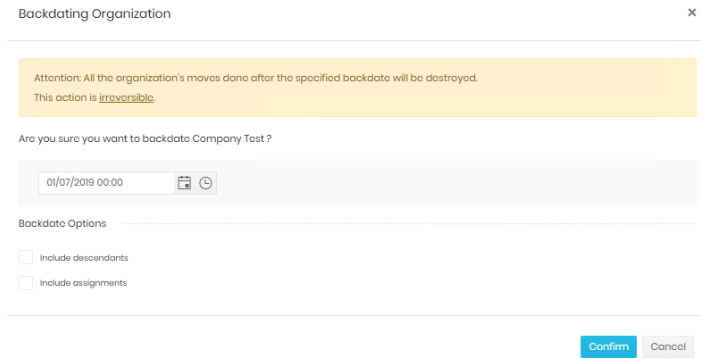
Backdating

Changing the assignment of a fixed charge applied to an endpoint is one thing, but you may need to roll back considerably more comprehensive changes to the directory from time to time. For example, one department merges with another and wants to set a specific start date for the call history to follow the new structure, or several employee moves occurred but the Prism team was not notified until later.

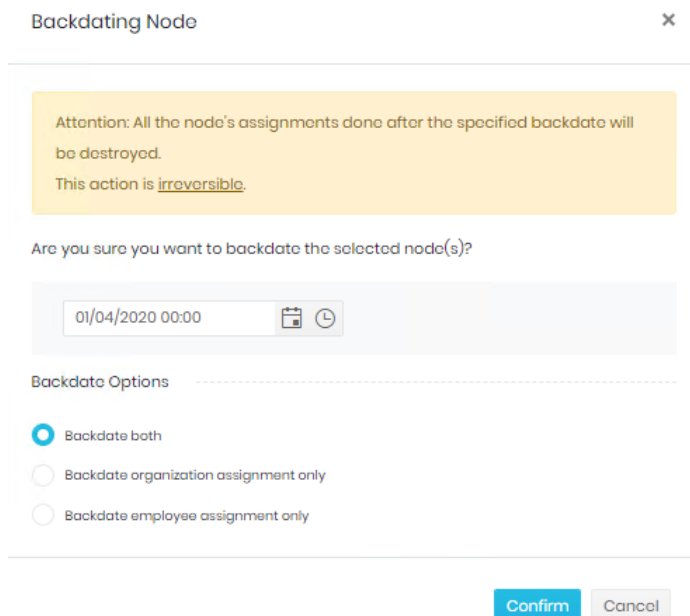
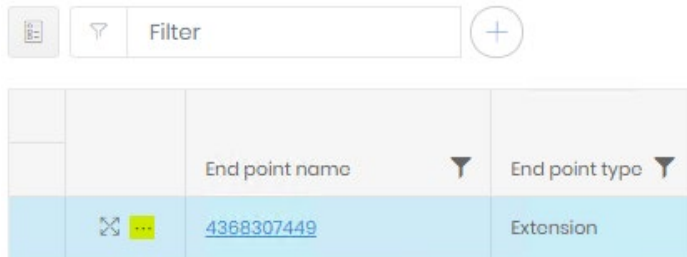
Backdating is a way of selecting a set of records and adjusting all their start dates at one time. This process will destroy any other moves and changes to the affected records between the new and original start dates.

There are several ways of stating the backdating process.

1. Click the cog icon next to an organization in the tree view. This will ask you to select the new start date, and if you want to apply the same change to descendants and assignments.



2. Include descendants will apply the backdate to all organizations below the selected one in the branch, otherwise they will be left unchanged, and organization changes will be left in the records' histories.
3. Include assignments will apply the backdate to all endpoint assignments. A backdate process on an organization will not change endpoint to employee assignments.
 - a. Click the ellipsis to the left of the endpoint row
 - b. and choose backdate.



- 4 This gives a similar dialogue, but there are differences to the options. You still have to set a new start date, but now the other option relates to endpoint assignment only. You can select to change the endpoint assignment to the organization, the endpoint assignment to the employee, or to change both.

5 By selecting multiple endpoints and clicking the Backdate control

		End point name	End point ty...	Employee	
				Owner	From
<input checked="" type="checkbox"/>	✕ ...	4368307449	Extension	Ab Bark	23/06/2020 12:42:17
<input type="checkbox"/>	✕ ...	4155145872	Extension	Abbe Sizzey	01/05/2020 08:56:00
<input checked="" type="checkbox"/>	✕ ...	600119	Hunt Group	Abbe Sizzey	18/06/2020 09:08:11
<input type="checkbox"/>	✕ ...	6475749183	Extension	Adclind Wood	18/06/2020 09:08:11
<input checked="" type="checkbox"/>	✕ ...	2182180898	Extension	Aida Letrange	01/06/2020 00:00:00

6 This will give the same dialogue as option 2, though the date and option chosen will be applied to all selected endpoints.

Unassign

If you need to remove an endpoint from an organization then you can trigger that in two ways.

1. Click the ellipsis to the left of the endpoint row

		End point name	End point type
<input checked="" type="checkbox"/>	✕ ...	4368307449	Extension

- 2 and choose Unassign endpoint.

- 3 By selecting multiple endpoints and clicking the Unassign control

		End point name	End point ty...	Employee	
				Owner	From
<input checked="" type="checkbox"/>	✕ ...	4368307449	Extension	Ab Bark	23/06/2020 12:42:17
<input type="checkbox"/>	✕ ...	4155145872	Extension	Abbe Sizzey	01/05/2020 08:56:00
<input checked="" type="checkbox"/>	✕ ...	600119	Hunt Group	Abbe Sizzey	18/06/2020 09:08:11
<input type="checkbox"/>	✕ ...	6475749183	Extension	Adclind Wood	18/06/2020 09:08:11
<input checked="" type="checkbox"/>	✕ ...	2182180898	Extension	Aida Letrange	01/06/2020 00:00:00

In both cases you will see a confirmation page with the option to retain the employee assignment to the endpoint. If this box is not ticked then both assignments will be removed.

Unassign Node
✕

Are you sure you want to unassign the selected node(s)?

Keep employee assignment

Confirm
Cancel

Administration - Settings

Tree

In the tree section you can edit the name of your tree (defaults are Departments, Cost Centres, and Projects) and configure how many levels the hierarchy can contain.

Department
Settings

Tree Names

Tree Levels

Tree Names

Tree name

Tree name (singular)

While editing the tree name you must provide a version of the name for both singular and plural reference.

Tree levels can be distinguished by names and icons, both set in the edit screen.

Department
Settings

Tree Names

Tree Levels

Tree Levels

Level count 5

Level	Icon	Name
1		<input style="width: 80%;" type="text" value="Parent Organization"/>
2		<input style="width: 80%;" type="text" value="Site"/>
3		<input style="width: 80%;" type="text" value="Department"/>
4		<input style="width: 80%;" type="text" value="Sub Department"/>
5		<input style="width: 80%;" type="text" value="Region"/>

Preview


- ▼ Parent Organization
 - ▼ Site
 - ▼ Department
 - ▼ Sub Department
 - Region

Each tree can have a maximum of 12 levels, including the parent item at the very top.

Custom Fields

Custom fields that are configured and enabled here appear for every organization in the relevant tree.




Department | Settings


Custom Fields 









Display order	Field name	Is visible	Updated By	Updated
1	Department Manager	✓	Piers Anderson	24/06/2020 08:22:04
2	Department Manager email	✓	Piers Anderson	24/06/2020 08:20:56
3	Field_Label_3	×	Piers Anderson	24/06/2020 08:20:56
4	Field_Label_4	×	Piers Anderson	24/06/2020 08:20:56
5	Field_Label_5	×	Piers Anderson	24/06/2020 08:20:56
6	Field_Label_6	×	Piers Anderson	24/06/2020 08:20:56
7	Field_Label_7	×	Piers Anderson	24/06/2020 08:20:56
8	Field_Label_8	×	Piers Anderson	24/06/2020 08:20:56

Once in edit mode you can alter the name of the field, the order that the fields are shown in, and whether or not the field is visible to users.

Department | Settings

Custom Fields   

 Please define and adjust the custom fields in the table below. Click on each cell to edit the values, use the first cell to drag-drop the records to set the order and use the 'Is Visible' column to set the visibility of the fields.

	Field name	Is visible
	Department Manager	✓
	Department Manager email	✓
	Field_Label_3	×
	Field_Label_4	×
	Field_Label_5	×
	Field_Label_6	×
	Field_Label_7	×
	Field_Label_8	×

Links

Each tree submenu has direct links to the other two trees

