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VISUAL TAXE 4

PRO - Express

The User's
Directory Module Manual

This manual is applicable as from the version 4.1.0A00

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Introduction

This manual is common for Visual Tax Pro and Visual Tax Express software. Nevertheless, these two products with the same level of capacity and options, some elements described in this manual may not apply to any of the products. For differences between Visual and Visual Pro Visual Tax Express, see Chapter 13 technical specifications.

Why a directory management?

When you see the communications, if only extension numbers are provided, it is not always simple to connect a post to a person.

If you want to analyze the telephone traffic of a service, you must have filled this service beforehand. Directory management thus enables you to identify each phone number (positions, modems, fax, etc...) and group them in companies, departments, divisions, services, etc...

From the software, there are two directories:

- Internal directory : the directory of subscribers
- External directory : the directory of external contacts



Most software features based on the directory. Therefore, if you are not managing your directory correctly, results statistics and consultation of communications may be wrong.

Should I manually enter the directory?

The directory management from the software is specific to each client. Indeed, depending on your phone architecture or not you can handle the directory from the software.

In case the software would be connected to some PBX or management centers, the software is able automatically import the phone book of the PBX.

To find out if this is the case in your architecture, please contact the company that installed the software.

It is also possible to import a phone book from a TXT file.

Then you do not have to enter or update your directory, the software is important that the PBX. Nevertheless, you need to set in the internal directory subscriber type for certain positions (station operators, group, etc...).

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How to access the screen for managing the directory

To access the software you must use a compatible browser (ex: Microsoft Internet Explorer or Mozilla Firefox v3 v8).

The URL to enter in the browser depends on the server name or IP address, and type installation. Ask your network administrator or your dealer.

If you're connecting from the server itself, you can enter the following URL:

- if the software coexists with AASTRA AM7450 : <https://localhost/VisualTaxeWeb>
- if the software does not live with AASTRA AM7450 : <http://localhost:8888/VisualTaxeWeb>

Otherwise, use one of the above URL, replacing localhost with the name or IP address of the server.

You get the following screen.

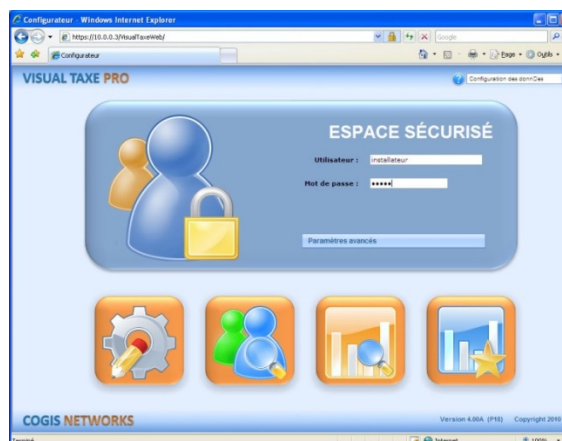
Use **user** and **password** to identify you.

Think are case sensitive.

The login is manufacturer installer, and the word super password.

The log-on manufacturer is **fitter**, and the **super** password.

To access the management module the directory, click



At any time , to return to the home page, click the picture indicating VISUAL TAXE PRO or VISUAL TAXE EXPRESS, located on the top left

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What makes up the directory?

Directory software consists of 3 elements: the **subscribers**, **hierarchical levels** and **side tables**.
The use of side tables is optional.

Subscribers

The directory is comprised of subscribers.

Should appear in the directory:

- Numbers of users,
- Modems and fax numbers , mailing machine ,
- Groups of calls and their agents
- Standard and operator stations

If a subscriber has several numbers on his computer, each number will appear.



The number of subscribers that can be entered or the software can import is limited; it depends on your software license.

Hierarchy

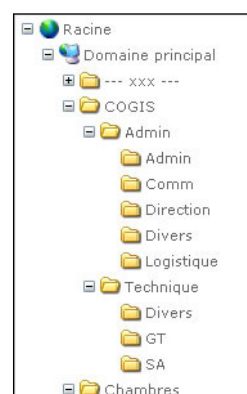
Directory software is hierarchical, it mean that positions are divided into a hierarchy of companies, divisions, services, etc...

The hierarchy of the directory is the organization (nesting) levels between them.

In this example against that society is observed COGIS consists of two hierarchical sublevels.

The "Technical" Management is an "intermediate level" and services "Miscellaneous", "Lab" are "levels terminals".

In this case we speak of hierarchy levels whose 3 Company "COGIS" is the main level.



Only the terminal levels can contain positions. Other levels: "Main" and "intermediaries" can only contain other levels "Intermediate" or "end".

The software supports: at least 2 hierarchical levels and up to 9 levels of hierarchy.

In the case of directory interactivity with the PBX, the number of levels depends on the accepted supported by the PBX.

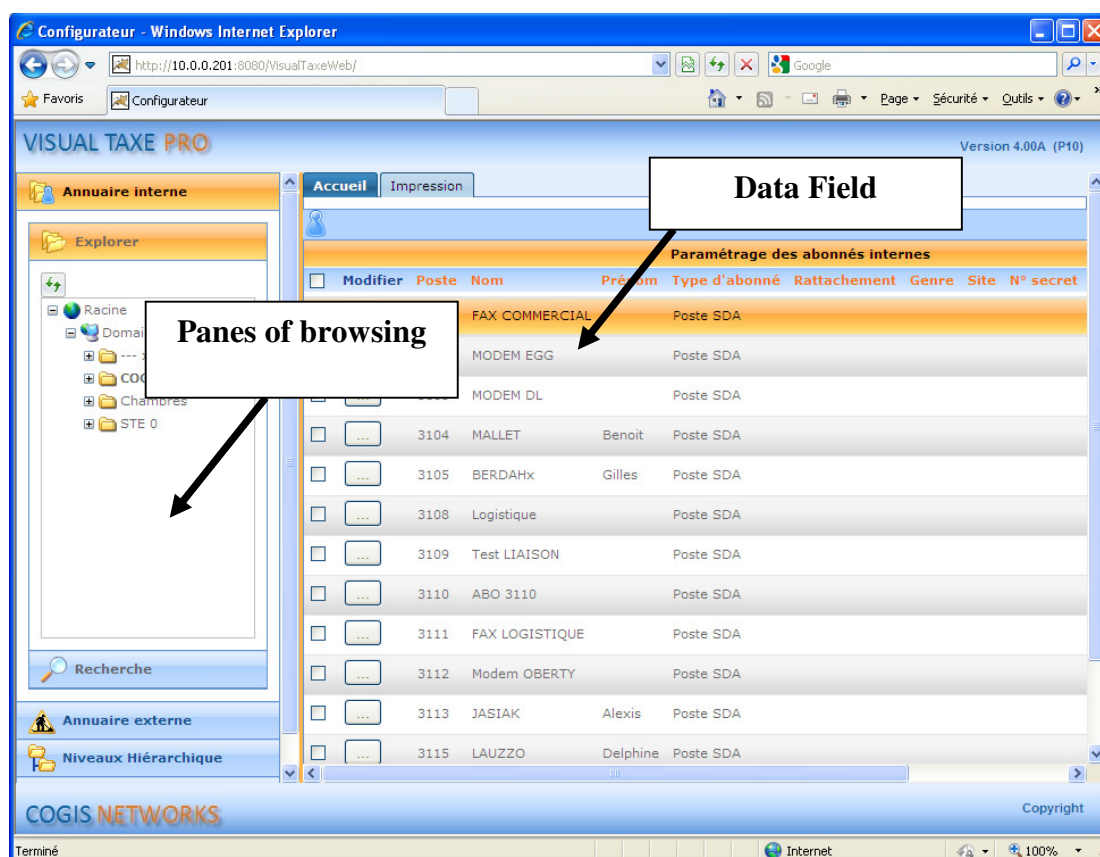
The side tables

The side tables are used to enter information that can be used in cards subscribers, such as the type, function, the site and the cost center.

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Description of the screen

You get the following screen



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Panes of browsing

On the left part of the screen, you will notice the panes of browsing.

The 1st pane names **Internal Directory**.

The **Explorer** is used to select the hierarchy.

Clicking it takes you to manage subscribers.

You can click a company, management or service only to see appear on the right dependent subscribers of this hierarchy.

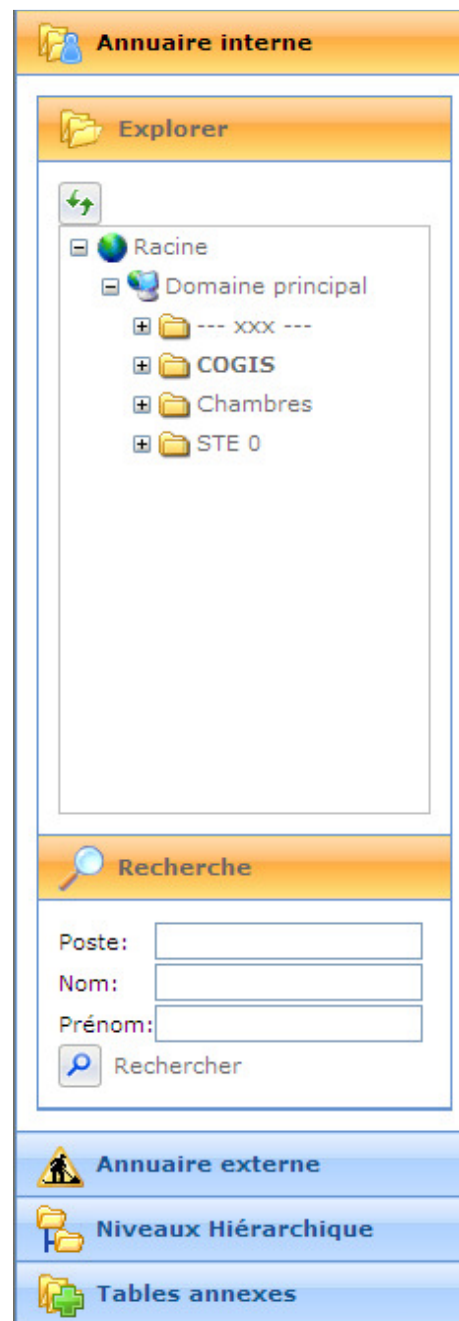
The area below, called **Search**, allows you to search.

After you enter your values, click the magnifying glass below.

The 2nd component called **external directory**, allows the sheets external subscribers.

The 3rd component called **hierarchical levels**, allows manage the levels of the directory (company, directions, etc. ...).

The 4th component, annexes **Tables**, should be used to manage portals (site, function, etc. ...).



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The data field

Accueil

Impression

Paramétrage des abonnés internes

	Modifier	Poste	Nom	Prénom	Type d'abonné	Rattachement	Genre	Site	N° secret	Attribut
<input type="checkbox"/>	<div>...</div>	3101	FAX COMMERCIAL		Poste SDA					LV
<input type="checkbox"/>	<div>...</div>	3102	MODEM EGG		Poste SDA					LV
<input type="checkbox"/>	<div>...</div>	3103	MODEM DL		Poste SDA					LV
<input type="checkbox"/>	<div>...</div>	3104	MALLET	Benoit	Poste SDA					LV
<input type="checkbox"/>	<div>...</div>	3105	BERDAHx	Gilles	Poste SDA					LV
<input type="checkbox"/>	<div>...</div>	3108	Logistique		Poste SDA					LV
<input type="checkbox"/>	<div>...</div>	3109	Test LIAISON		Poste SDA					LV
<input type="checkbox"/>	<div>...</div>	3110	ABO 3110		Poste SDA					LV
<input type="checkbox"/>	<div>...</div>	3111	FAX LOGISTIQUE		Poste SDA					LV
<input type="checkbox"/>	<div>...</div>	3112	Modem OBERTY		Poste SDA					LV
<input type="checkbox"/>	<div>...</div>	3113	JASIAK	Alexis	Poste SDA					LV
<input type="checkbox"/>	<div>...</div>	3115	LAUZZO	Delphine	Poste SDA					LV
<input type="checkbox"/>	<div>...</div>	3116	toto2		Poste SDA					LV

133 enregistrements

Ajouter

Supprimer

Déplacer

It is in this area that will appear depending on what data you may have entered in the pronged exploration.

Above the **Print** tab allows you to define an export your data in Excel.

Interface

On the different screen:

- To add a line, click the button **ADD**, enter your parameters, then to save you have to click the button **CONFIRM**.
- To modify, click the field to change. Modify it, then to save you have to click the button **CONFIRM**.
- To delete a line, on the left of this line is located a checkbox, notch it, and then click the button **DELETE**.

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Hierarchical levels

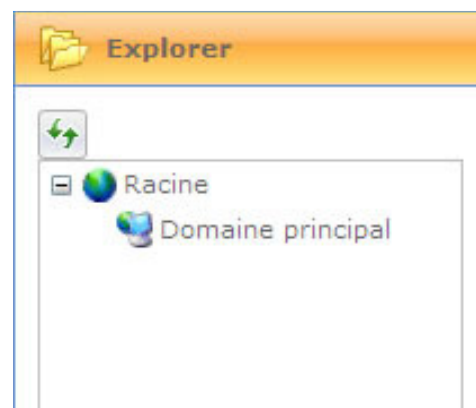
How to create hierarchical levels?

Hierarchy levels.

Click the location in which you want to create a hierarchy.

Consider the case where we have the domain Main and want to create the company COGIS.

Click **main domain**, then on the right, below the data area, click the button **ADD**.



On the right, the new company appears.

- In wording enter a name.
- In number of levels in type the maximum number of nested levels in the society, also counting society.

For example; if you want to manage branches and departments from the company, enter the value 3.

Niveaux 1 du Domaine principal		
<input type="checkbox"/>	Libellé	Nbre. de niveaux
<input type="checkbox"/>	006	2

To save , bellow of the window, click the button **CONFIRM**.

Then, if you want to create sub-levels at the company COGIS from the pane, click the Society. And make it the same for creation and to finish click the button **CONFIRM**.

How to change a hierarchical level?

To change a hierarchical level from the pane, click the hierarchical level to modify, right fields constituent appear, you can change them.

Don't forget to pulse the button **CONFIRM** to save your changes.

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How to delete a hierarchical level?

To delete a hierarchical level, in the pane, click the hierarchical level above the one you want to delete.

Niveaux 1 du Domaine principal		
<input type="checkbox"/>	Libellé	Nbre. de niveaux
<input type="checkbox"/>	COGIS	2

On the right, select the checkbox corresponding to the level to remove, then, click the button **DELETE**.

Note that you can delete a hierarchy only if it contains no more subscribers.



Caution, if you check the checkbox on the color bar next to label, this removes all hierarchical levels and not just the one in delete.

Change the fields labels 1 Level, 2 Level, 3 Level

From the software, the first level of the hierarchy is called society. This is the case in our for example COGIS entity.

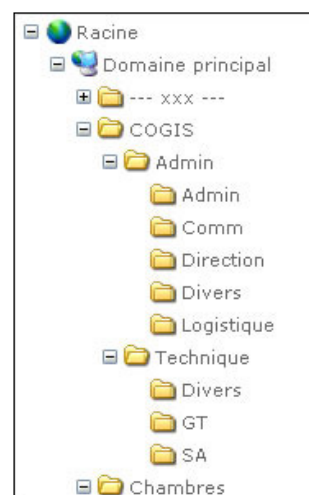
However, the underlying levels called Level 2, Level 3, level 4, etc...

If you want to rename the labels types hierarchical level, on the left side, in hierarchical levels and click the domain name.

You will see all the companies appear each with a button named Label.

Click the Label button, a window appears, allowing you to change names of hierarchical levels.

Field "label 1" corresponding to the level Hierarchical number 1 and so on...



Setting thresholds phreaking

To set the thresholds phreaking, left in hierarchical level, click Domain Main , then right above the data area, select the acquisition source where based society.

You get the list of companies in the acquisition source.

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Niveaux 1 du Domaine principal			
<input type="checkbox"/>	Libellé	Nombre de niveaux	Phreaking
<input type="checkbox"/>	--- xxx ---	2	<input type="button" value="Phreaking"/>
<input type="checkbox"/>	COGIS	2	<input type="button" value="Phreaking"/>

On the line where the company you want to define thresholds phreaking, click the **Phreaking** button.

You get the following window against.

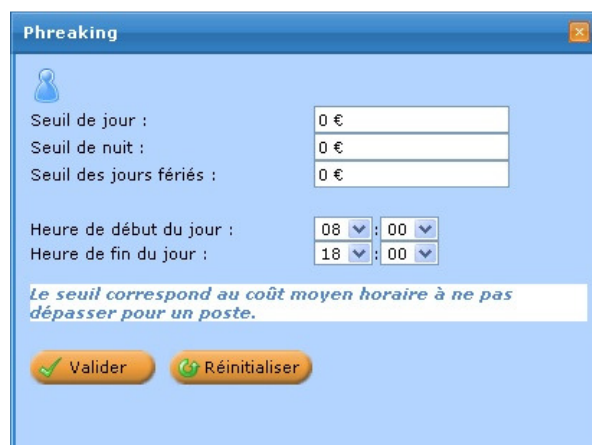
Set for day periods, night and weekend, thresholds phreaking.
If the threshold for a period is 0, no analysis will be made of phreaking during this period.

You can set the start time / end the update period.

Holidays are defined from the module configuration, then **charging** in **day's holidays**.

To save , click the button **CONFIRM**.

When you change any of these settings, you must restart the process collector (look at Reference Manual).



Phreaking

Seuil de jour : 0 €
 Seuil de nuit : 0 €
 Seuil des jours fériés : 0 €

Heure de début du jour : 08 : 00
 Heure de fin du jour : 18 : 00

Le seuil correspond au coût moyen horaire à ne pas dépasser pour un poste.

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Internal subscribers

Before you create a post

As previously stated, you have an obligation to create all of your numbers installation. This task can be tough because we must first know all the numbers.

For this purpose the software can be of great help to you.
Indeed, the software is able to show you the list of numbers that you must create.

Each time the software receives a phone call it checks if the position is covered by the call in the directory. If it does not exist, for the software is an inconsistency!
In this case, the software will automatically create the number from the directory in society "XXX".

So, before you create a post, check if it does not already exist in the directory or in a company you created either from the XXX Company.
If you find it, do not create the number a second time, but move the number in the good hierarchy, then give it the right name.



If you create a job when there is already either from a company you created either from the company "XXX", then the number will double, and Communications will be assigned to the old directory profile and not to that you created lately.

Directory import

If your software has been configured to automatically import an LDAP directory or TXT file, and if the directory purge before or after import is enabled, you will not have to enter your directory manually.

Indeed, in this case, each subscriber is important that you create manually will deleted.

However, if you nevertheless want to manually create some subscribers and do would not it be deleted from the directory import, you need during the creation of these subscribers, uncheck the item "purge authorized".

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Creating a subscriber

The creation of members is similar to creating hierarchical levels.

Click the **Internal directory** pane, and then in **Explorer**, click the hierarchical level where you want to add the subscriber.

To finish, on the right click the button **ADD**.

On the right the following screen appears.

Fill in the fields (at minimum position and name).

If when you added the subscriber, you were not in a terminal level, you will need to right select levels (Level 1 to Niveau9) correspondents.

To accept your input, click the button **CONFIRM**.

Then, if you want to enter a new subscriber, please click the button **ADD**, otherwise, the left click the hierarchical level.

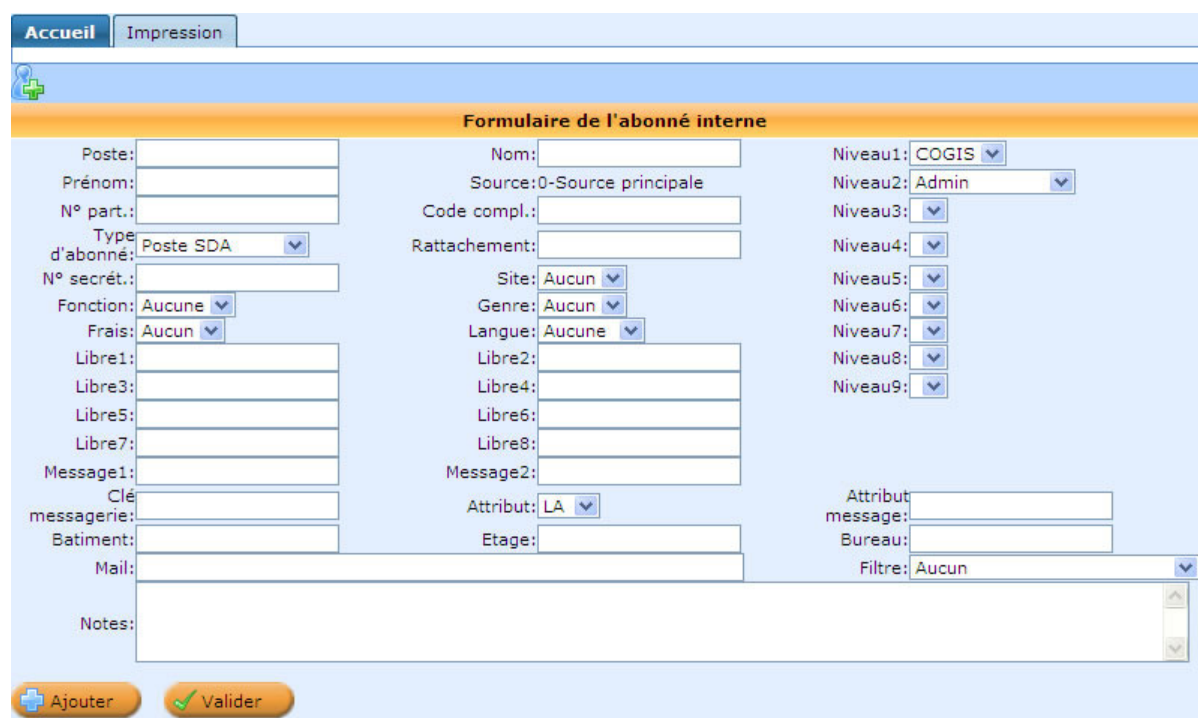
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How to change a subscriber?

Click the **Internal directory pane**, and then in **Explorer**, click the hierarchical level where located the subscriber to change.

On the right locate the subscriber, and then on the subscriber left, click .

You get the subscriber's editing screen.



Modify the required fields, and then to confirm your entry, click the button **CONFIRM**.

How to remove a subscriber?

Click the **Internal directory pane**, and then in **Explorer**, click the hierarchical level where the subscriber is located to be deleted.

On the right, locate the subscriber, and then on the left of the subscriber, select the check box and the bottom of the list and click the button **DELETE**.

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How to move a subscriber?

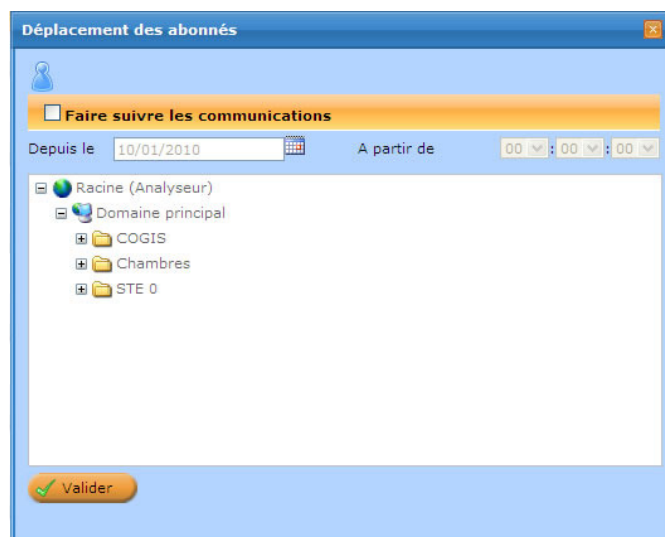
To move a subscriber there are 2 methods.

The first method is to use the change of a subscriber function.
For this, see the section "how to change a subscriber."
You will now simply modify all or part of fields 1 to 9 level.

Otherwise, there is a more important method.

Select your subscriber by checking the checkbox to the right of the subscriber, then the bottom of the list, click **MOVE**.

You get the following screen.



If you want the communications subscriber change hierarchy along the directory, select **Forward communication**, then select the date and below the time at which communications should be moved.

Then, below, click the hierarchical level terminal you want to move the plug directory (and communications if you selected the option).

Then click the button **CONFIRM**.

Edit libels free fields 1, 2 free, etc...

In the directory of subscribers, there are optional fields called 1free 2free 3free 4free 5free 6 free 7free and 8 free.

To rename these fields, refer to the setup manual.

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Find one or more subscribers

If you want to search for one or more subscribers, the software offers a research tool.

With one click, select the domain, society, or any other hierarchical element that will carry the research.

On the left, click **SEARCH**.

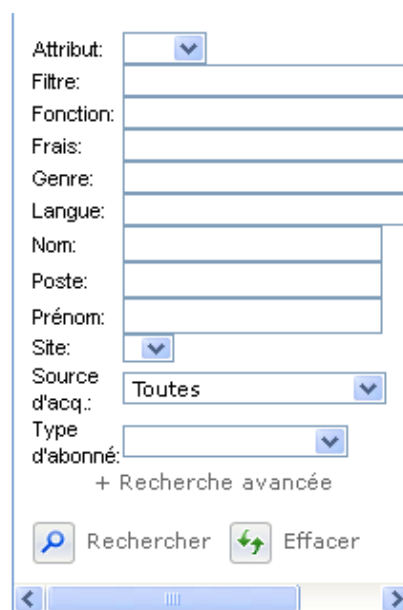
Below, you see the field's research.

Complete the search values and then click .

If the available fields are not enough, click + **Advanced Research**, new fields appear below.
You can combine several fields.

So if you enter "post: 3124" and "Name: Smith", the software will search all the 3124 positions having as name Smith.

When researching a chain characters, you can enter only the beginning the search term. For example, in Name you type "Sm", the software will search all subscribers with a name starting with "Sm".



The screenshot shows a search form with the following fields and controls:

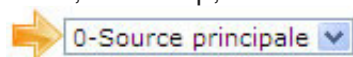
- Attribut:
- Filtre:
- Fonction:
- Frais:
- Genre:
- Langue:
- Nom:
- Poste:
- Prénom:
- Site:
- Source d'acq.:
- Type d'abonné:
- + Recherche avancée
- Rechercher (with search icon)
- Effacer (with delete icon)

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The side tables

Click the pane **Side tables**, and then click the side table to work on.

Then, at the top, select the acquisition source for which you want to manage the schedule table.



Below, the list of items displayed.

To add an item, click the button **ADD**. The item appears in the list, change it and click the button **CONFIRM**.

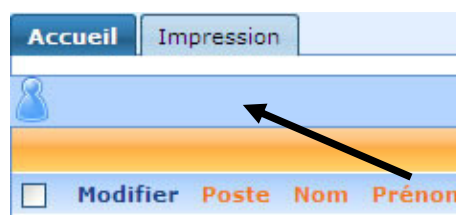
To edit an item, click directly on the field to change, once the new value entered, click the button **CONFIRM**.

To delete an item, click the check box of the item, then click the button **DELETE**.

Manually export the directory of subscribers

To export the directory to a file, click the **internal directory** pane, and then in **Explorer**, click the hierarchical level the directory you want to export.

Then above, click the **Print** tab.

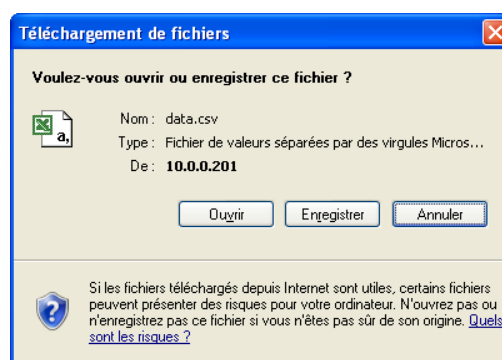


Then click the button



You get the following dialog:

- click **Open** to open the file
- Click **Save** to store the file on your disc or pendrive



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Automatically export the directory of subscribers

To schedule periodic automatic export of subscriber directory, see paragraph "schedules" setup manual.

Import the directory

To import the directory of subscribers, refer to the setup manual.

External subscribers

Click the **external directory** pane.

The available fields for the external directory listings are more limited than for the directory internal. Records management of external directory is similar to the internal directory.

How to access an archived basis?

This is when you recognize that you can select an archived database.
Of course, before you can select an archived database you need to restore it.
To restore an archived database, consult the configuration manual.

If you want to access a database that was previously archived, and you have since mandatory restored, below the password, click **Settings advanced**.

Below, in **selecting archives** select the archive to which you want work, the database archiving date appears then.

If you do not want, select **none**.

