# Administration Guide

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# Administration Guide

## Product Description

Contact Manager is Imagicle solution for centralized contacts management. Contact Manager lets you create an **unlimited number of directories** to hold the company external contacts.

The directories can be browsed, searched and managed through an easy to use **web interface** or through other **Imagicle applications** (e.g. Attendant Console, Desktop CTI, Digital Fax, Advanced Queuing...). The web interface also supports **click-to-dial** on Cisco UCM Calling Platforms.

The contacts can be added through the web interface, imported from a .csv file or **synchronized** with external data sources.

Contact Manager natively supports standard LDAP protocol. Moreover, Imagicle Meta Connector ver. 5.0 is available for synchronizing contacts from **virtually any source** (MS Exchange, OpenLdap, ODBC database, CRM ...) and make them available to all the company employees

Contact Manager is part of Imagicle UC Suite.

### Public, department and personal directories

Contact Manager can create three kind of directories:

- Public directories: everybody can see them
- Department directories: these can be accessed only by the members of a department
- Personal directories: each user on your organization can create and manage his / her directories. Those are private and can be accessed only by their owner

The limits to the directory visibility are inherited by all Imagicle applications. In addition when you create a directory you can choose whether all users will be able to modify it or if the contacts will be added or removed only by administrators.

**Department Directories** are especially suitable for large companies with many branches. With Contact Manager managing thousands of contacts is very easy.

### Fully customizable

Contact Manager can hold five contact's personal information details plus five telephone numbers, with relevant "Smart Numbers" (speed dial). If this is not enough for the customer needs, you can activate **up to ten additional fields**.

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**Add New Contact - Public Contact**

| | | | |
|---|---|---|---|
| First Name | Robert | | |
| Last Name | Smith | | |
| Company Name | ACME Inc. | | |
| Email | john.smith@acme.com | | |
| Postal Address | | | |
| Fax | 7665559987 | Speed dial | 100 |
| Home Phone | | Speed dial | |
| Business Phone | 7665554477 | Speed dial | 200 |
| Mobile Business | 3965550921 | Speed dial | 201 |
| Mobile Private | | Speed dial | |

Insert Cancel

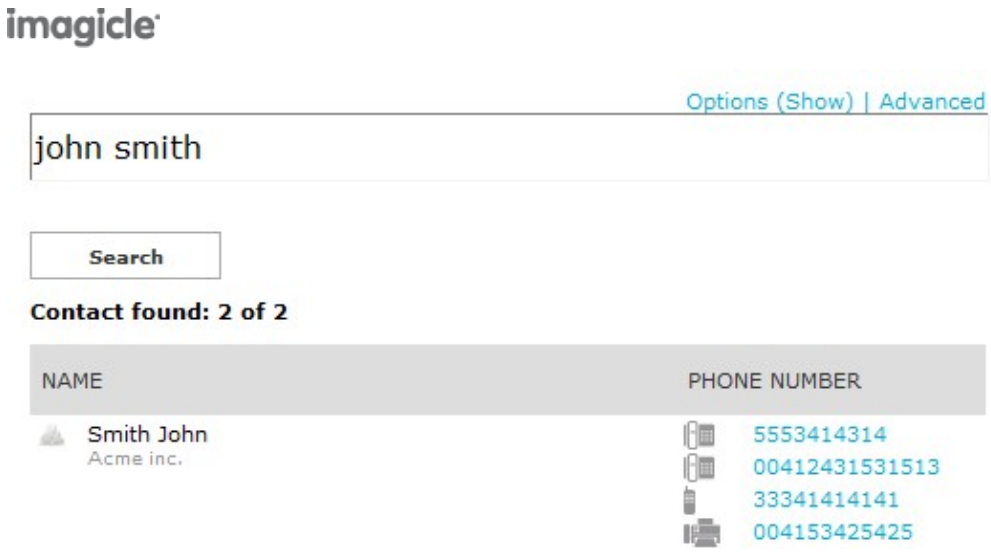
The web interface can be **fully customized**. You can choose which field can be searched or displayed in the results list.

WHO ARE YOU LOOKING FOR?

Options (Show) | Simple

| | |
|---|---|
| Last name | |
| First name | |
| Email | |
| Primary Ext number | |
| Department | |

Search




**Note**: the additional custom field are hidden by default. Displaying an additional field on the web interface or on the IP phone requires manual configuration. **Please contact Imagicle Support Team to receive detailed instructions.**

# Imagicle Contacts

Imagicle Contacts is the perfect Contact Manager companion. It is a free application for your iPhone/iPad and Android which integrates with Contact Manager to bring your contacts with you. Imagicle Contacts allows you to access all your company directories, your personal contacts, Linkedin and Skype with a single search.

It can place calls from your phone but also from Skype and Cisco Jabber.

You may create a new list of your Favorite contacts and access a dedicated tab with the list of your Colleagues, always up-to-date and with all details.

Contact Manager: Manage & Organize Professional Business Contacts Software Solution - Imagicle

# Product Configuration

## User's Details

For each IAS User that is to use Contact Manager, the **First Extension Number** field must be filled in the User Configuration form. The "Mac Address" and "PBX username" may be required on some telephony systems.

You can access the User Configuration form in the IAS web interface by clicking "Admin->User Management", selecting a user and the pressing the "Modify" button.

If you plan to use department directories, you may assign the user to a **department** by filling the related field. The value must match exactly the Department field entered while creating the directory. See also "Managing Directories" in the Operation section.

If you want this user to be able to access the directories of more than one department, list their names in the **List of additional departments** field, separated by semicolon ";".

If you fill other **personal details**, such as home phone, office location... They will be included in the special read-only directory which includes all the internal contacts. This directory can be accessed either by Contact Manager web search or through the CTI applications (Imagicle Attendant Console). The only way to edit those directory contacts is through User Management.

You may want the user to be displayed with a different number whenever it is displayed (e.g. in QME searches, on the attendant console, in web searches, on the Caller ID searches, in the Colleagues list..). If this is the case, in the **Published Directory Number** field, please enter the number you want to be displayed in place of the first extension.

- If you want to hide the user, enter **-** in the **Published Directory Number** field.
- If you want the First Extension to be excluded from the Local Contacts directory, but you still want to include other numbers (fax, mobile..) enter **#** in the **Published Directory Number** field.

If you plan to use department directories, you may assign the user to a department by filling the related field. The value must match exactly the Department field entered while creating the directory. See also "Managing Directories" in the Operation section.

## User's Permissions

Once these fields have been set, review the user's permissions. The following access levels are available:

- No access - The user can see the directories neither on the prone nor by the web interface
- View Directories - The user has web and phone access to public, private and department directories
- Edit Department Directories - Same as View Directories, but the user can always edit the directories of his / her department by web and by phone
- Edit All Directories - Complete read / write access to all public and department directories
- Complete Management - Complete access to all the public and department directories. The user may also stop and start the Contact Manager service.

For more information please see below, "Understanding Contact Manager Permissions".

## Numbering Plan Parameters

When working on incoming and outgoing calls, Contact Manager must know some information on your company numbering plan, prefixes and so on.

Please set the telephony parameters as described in the General configuration section of this guide.

## Configuring how the caller name is displayed

It is possible to configure the lookup result modifying this parameter, that represent a list of tags, that Imagicle Application Suite replace with contact informations returning from lookup. Available tags are shown in web page. It is possible to specify more than one format string, the top-most one containing only non empty placeholders will be used.

In Imagicle Application Suite Web configuration portal, go to Contact Manager page, Manage Service.
In Service Configuration Section change the "Display Name Formatting rules" text box, according to the desired format.

**Example:**
Contact First Name: John
Contact Last Name: White
Contact Company: Acme

**Display Name formatting rules:**
$$FIRSTNAME$$ $$LASTNAME$$ - $$COMPANY$$
Result -> **John White - Acme**
$$COMPANY$$
Result -> **Acme**
$$FIRSTNAME$$ $$LASTNAME$$
Result -> **John White**

Contact First Name: Marc
Contact Last Name: Bloom
Contact Company: - (Empty)

**Display Name formatting rules:**
$$FIRSTNAME$$ $$LASTNAME$$ - $$COMPANY$$
$$FIRSTNAME$$ $$LASTNAME$$
$$LASTNAME$$ - $$COMPANY$$
$$COMPANY$$
$$LASTNAME$$
Result -> **Marc Bloom**

# Synchronizing contacts with external sources

Contact Manager can keep directory contacts aligned against an LDAP source. If you install **Meta Connector** ver. 5.0 on the Imagicle UC Suite, you can import and synchronize external contact from several sources.

Here is an example on how to create a synchronized directory which imports contacts from Active Directory. The procedure for other sources (e.g. MS Exchange..) is similar. Please refer to Estos documentation for more details.

## 1. Create a new synchronized directory

Please access to Imagicle web portal and go to *Contact Manager â Manage Directories* page, create a new Directory flagging the option Synchronized and enter the IP address of the server where Meta Connector 5.0 is installed on (it can be 127.0.0.1 if installed on the UC Suite server). LDAP port is 712, using the credentials choosen during Meta Connector 5.0 installation.

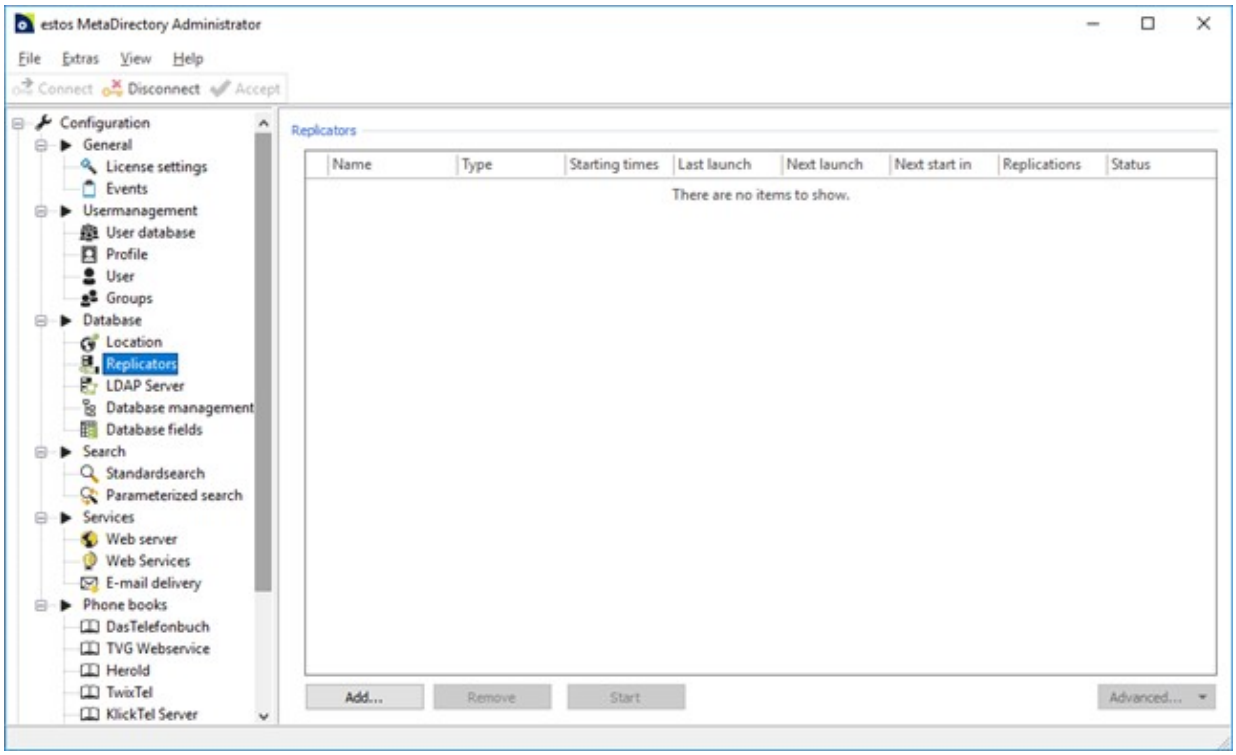
## 2. Configuring the replicator

***Estos MetaDirectory 5.0 Replicators List***

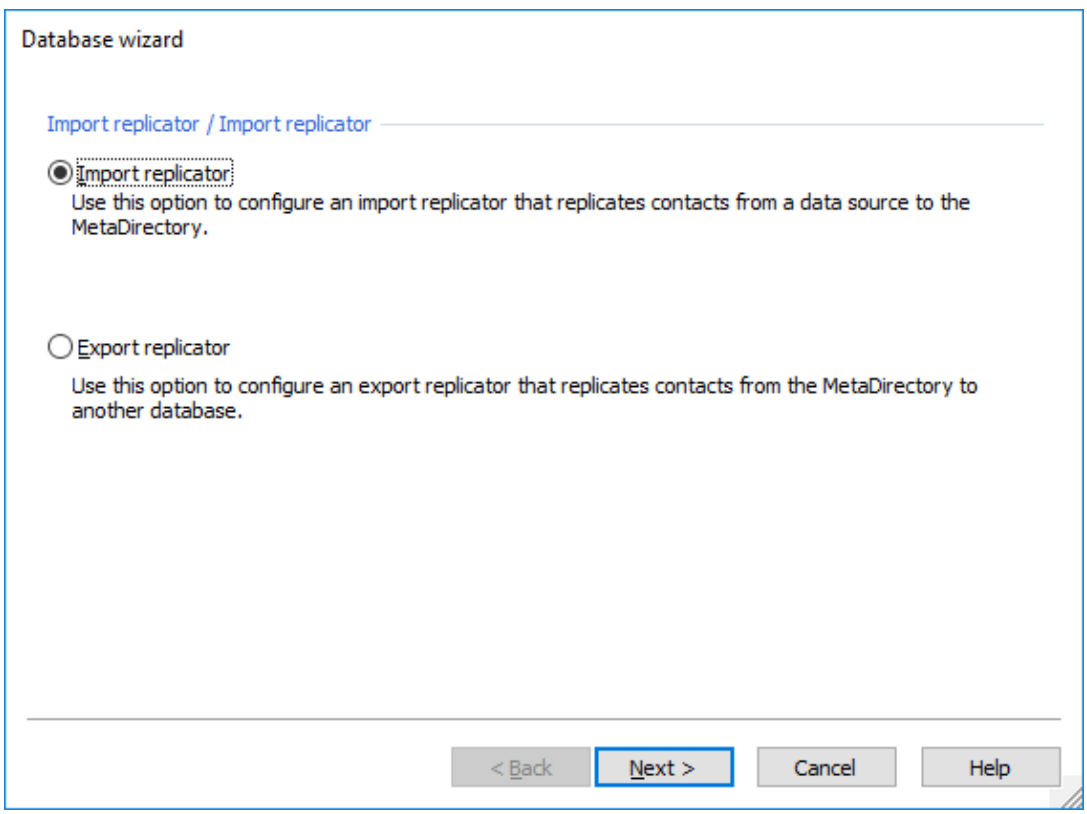
Replicator for IBM NotesÂ®
Replicator for DATEV SDD
Replicator for Steps Business Solution
Replicator for MicrosoftÂ® CRM ï · Replicator for MicrosoftÂ® Exchange Webservice (EWS)
Replicator for MicrosoftÂ® Dynamics Navision
Replicator for MicrosoftÂ® Outlook/Exchange
Replicator for Active DirectoryÂ® Server
Replicator for LDAP Servers
Replicator for MetaDirectory
Replicator for ODBC Databases
Replicator for Text & CSV Files
Replicator for Salesforce CRM
Replicator for Google Contacts (G-Suite)
Custom Replicator
Export Replicator for Active DirectoryÂ® Server
Export Replicator for XML Files
Export Replicator for CSV Files

Log onto the server where Meta Connector is installed on. Open Metadirectory Administration tool through the Start menu link.

Locate the "Replicators" and add a new one.

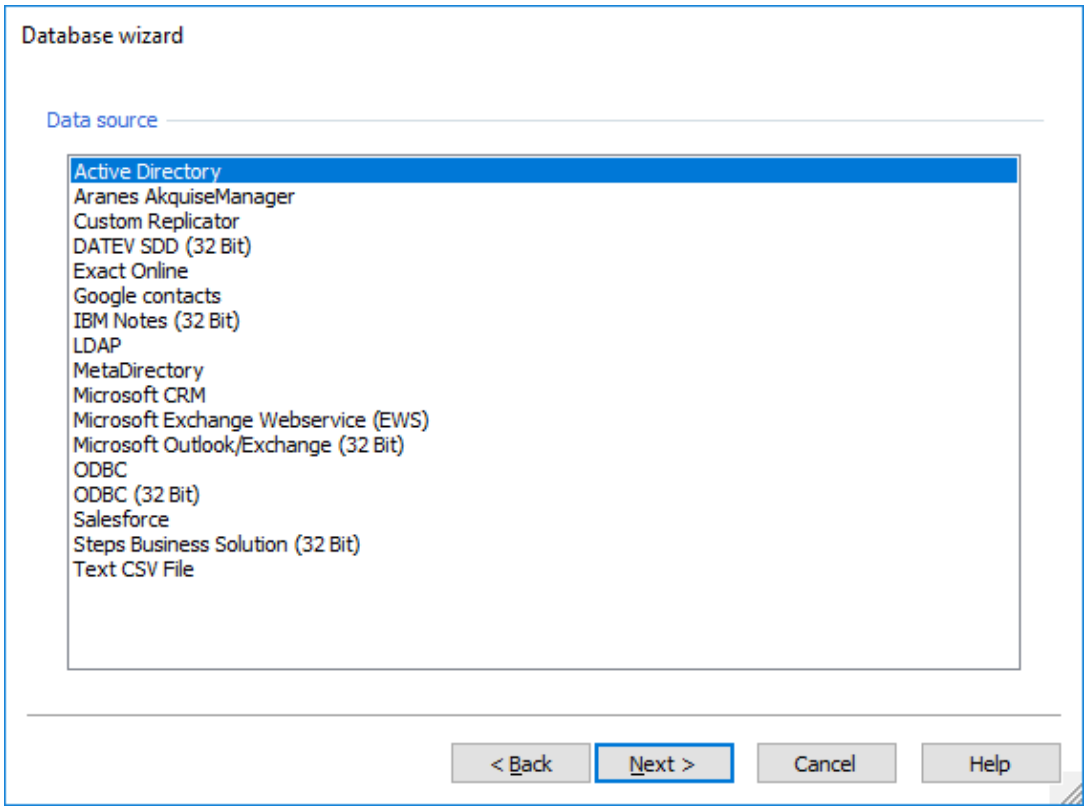



Select the "Import" replicator type.

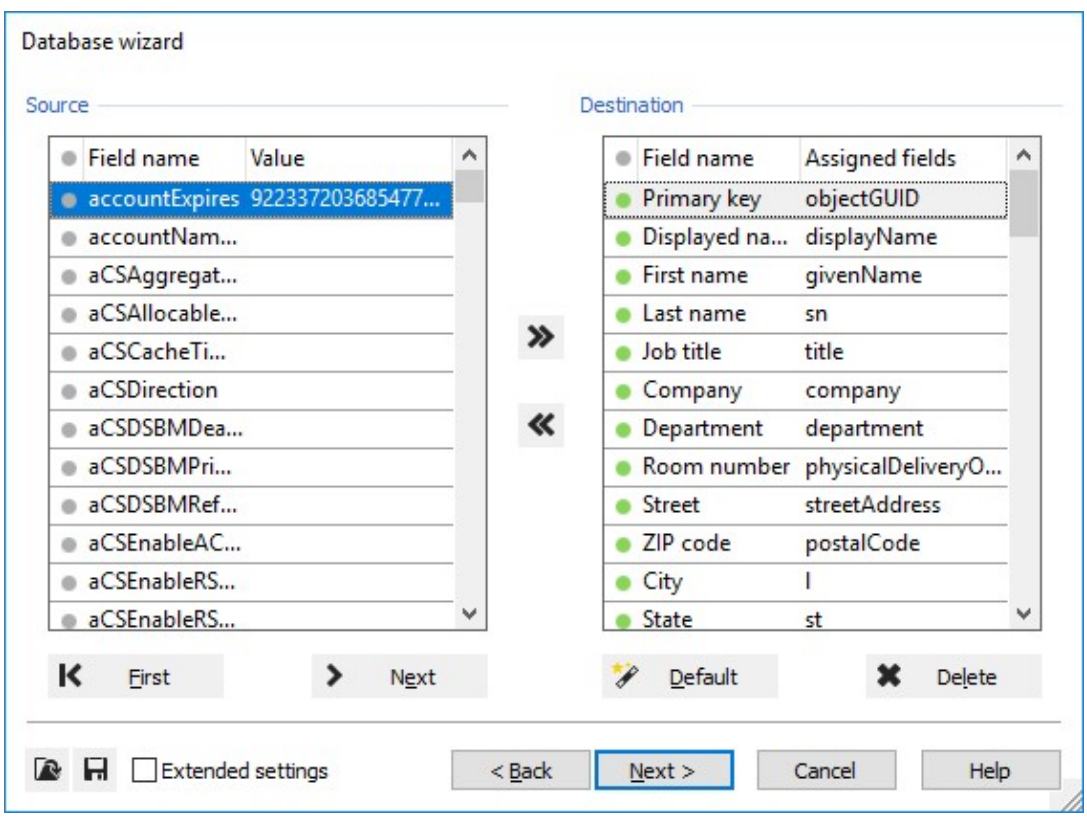



Select the Data Source type and follow the wizard.

```
â  NOTES:
- Salesforce Data Source: Estos guide here
(A valid SalesForce account authorized to use Salesforce API with a security token)
```




Configure fields mapping using below table:



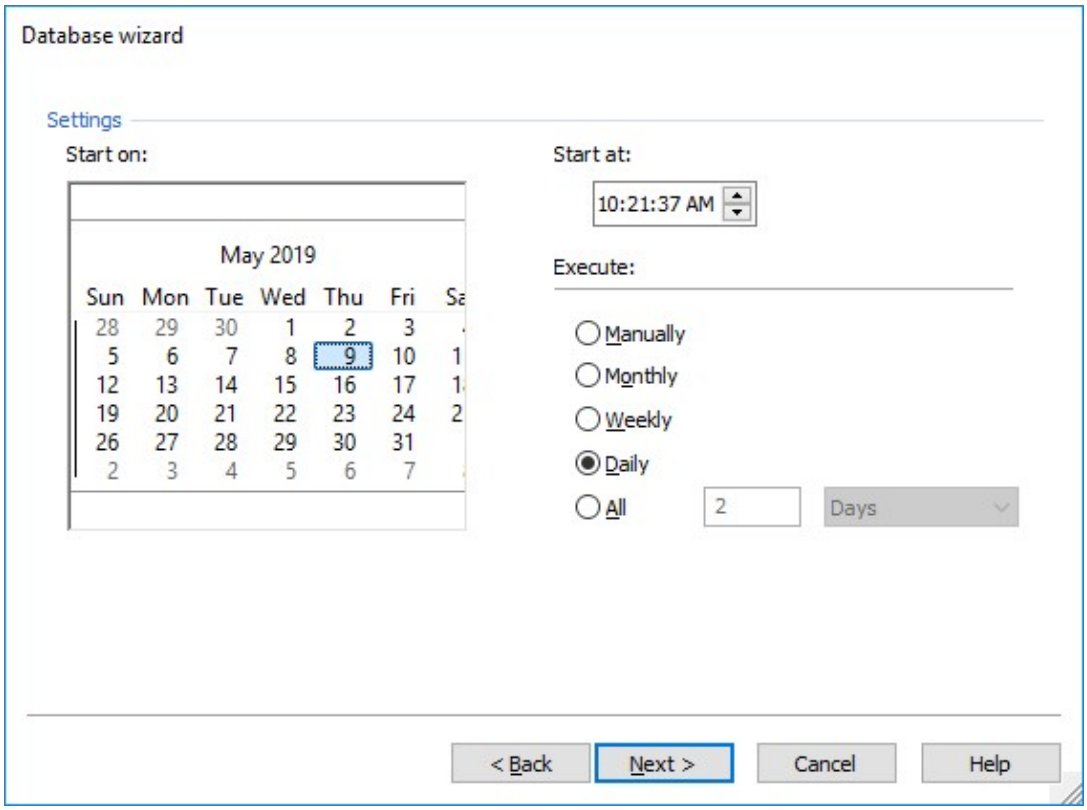

***How to map Meta Connector 5.0 database fields to Contact Manager***

This table shows how to map Meta Connector fields to Contact Manager fields.

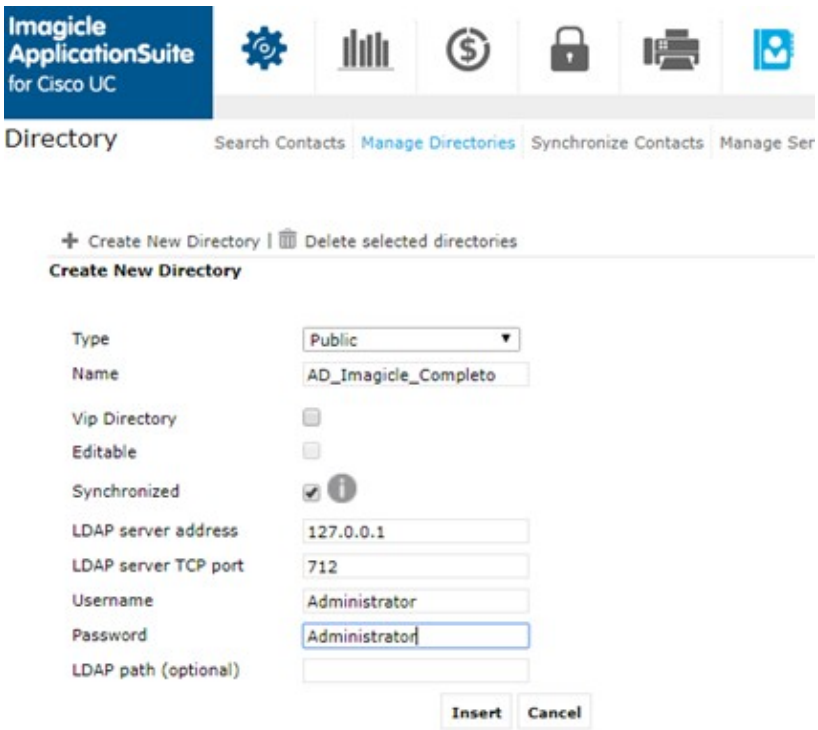
Source Table = Fields takes from the source
Destination Table (Field Name) = Meta Connector Fields
Destination Table (Assigned Fields) = Source fields assigned to Meta Connector fields

| ***Meta Connector Field Name*** | ***Contact Manager web portal Label*** |
|---|---|
| First name | First Name |
| Last name | Last Name |
| Company | Company |
| E-mail | Email |
| PrivatePhone | Home Phone |
| BusinessPhone | Business Phone |
| MobilePhone | Mobile Business |
| PagerPhone | Mobile Private |
| BusinessFax | Fax |
| Street Private | PostalAddress |
| Private Phone 2 | Speed Dial Home Phone |
| Business Phone 2 | Speed Dial Business Phone |
| Mobile Phone 2 | Speed Dial Mobile Phone |
| User1 | Custom1 |
| User2 | Custom2 |
| User3 | Custom3 |
| User4 | Custom4 |
| User5 | Custom5 |
| User6 | Custom6 |
| User7 | Custom7 |
| User8 | Custom8 |
| User9 | Custom9 |
| User0 | Custom10 |

Schedule the replication time. Please keep in mind to schedule it before actual LDAP synch configured on Contact Manager web portal.




### 3. Configure Contact Manager synchronization in UC Suite web page.




LDAP server address = Server IP where Meta Connector is installed

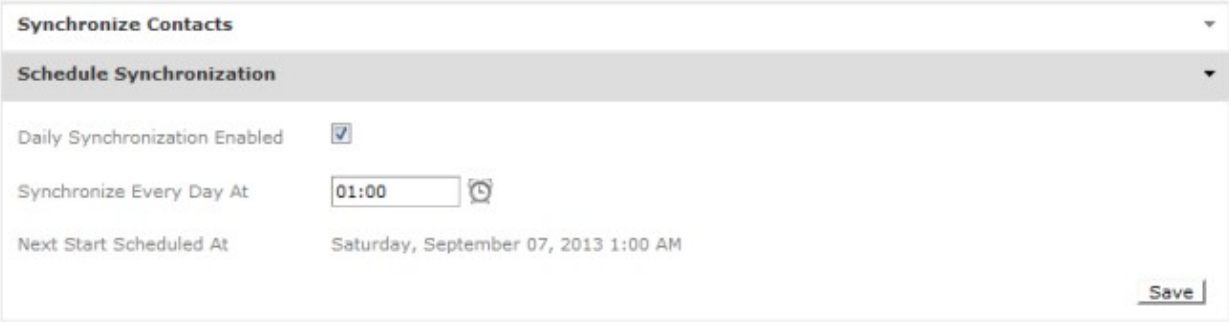
LDAP server TCP port = TCP port configured in Meta Connector (Default = 712)

Username/Password = Used to access Meta Connector administration

LDAP path = Check it in *Database-View* of Meta Connector Admin tool (Usually used for multiple Replicators)

## 4. Run Contacts Synchronization

Click on the **Synchronize contacts** link. After running Meta Connector import once, you can test the synchronization by clicking "Run Now" or activate daily synchronization. The settings may be different for each directory. Each user will be able to manage his or her directories depending on Contact Manager's permission level.




IMPORTANT: Please do not enable daily automatic synchronization on both Imagicle nodes associated to a HA cluster, because your directory will be corrupted. If this problem occurs, you can solve it by applying the following procedure:

- Disable automatic sync on backup node
- Delete all contact included into the corrupted directory(ies)
- Wait for replication to wipe-out contacts in the primary node, too
- Run manual sync on primary node.

If your directory includes several contacts, you can delete all of them through a SQL query. Please contact Imagicle Support for the same.

# Understanding Permissions

Each user can interact with the directories based upon the directories parameters specified hereafter:

- Directory Type: public (including department directories), private, local (including synchronized directories)
- If the Directory is meant to be modified by anyone, that is adding, editing and removing contacts
- User Permission Level for the Contact Manager application, which is set in the User Management
- Department the user belongs to
- Department to which the directory has been assigned

## Access to Private Directories

The private directories can always be viewed and modified by the user that has created them if he/she has at least the base access to the application (level 2 or higher). The owner of a private directory can always add, edit and remove its contacts. The owner of a private directory can also change its description or delete the entire directory.

The private directories cannot be viewed by the administrator or by any other user. Consequently:

- The private directories cannot be assigned to a User Department.
- Devices not assigned to any user cannot display private directories

Private Directories cannot contain VIP contacts.

## Access to Public and Department Directories

Contact Manager manages two types of Corporate Directories: public and department. **Public** directories are meant to be available to all IAS users, **department** directories are meant to be available to a subset (group) of the IAS users.

When a new directory is created, you can choose to restrict access to its contents to a group of users by assigning a Department to it. If you do not assign any department to the directory, it will be available to all users.

The Department property determines if a directory can be viewed (that is: browsed and searched) based on the following criteria:

- **If the user does not belong to any Department:** he/she can view all Directories (assigned AND not assigned to a specific Department).
- **If the user belongs to one or more Department:** he/she can view his/her Department directory and those that are not assigned to a Department. If no Directory has been assigned to his/her Department, then the user can only view the directories that are not assigned to a Department (that is, Public Directories).
- **User who can view all Public Directories (permission level 8 or higher):** he/she can view all Department Directories (as the User that doesn't belong to any Department), even if he/she has been assigned to a specific Department.
- **User who does not have access to the application (permission level lower than 2):** he/she cannot view any directory regardless of other access criteria.
- **Unrecognised user - anonymous requests:** he/she can view only the directories that are not assigned to any Department. This feature is not available through the web interface because you always have to login, but can affect requests from IP phones not assigned to any user.

## Managing Public and Department directories

If a Directory can be viewed by a User, this doesn't necessarily mean that he/she can change its properties (like the description, department, synchronization.. ) or delete it. Standard User can only view the public directories.

**Note**: viewing a directory contents means that you can browse and search its contacts.

Contact Manager allows two administrative roles: global administrators and department administrators. Global administrators can always add, edit properties, remove and view all the directories. Department administrators are global administrators limited to one ore more department.

The User Permission Level and the Department the user is assigned to determine the possibility to modify properties, delete or add new directories:

- **User who does not have access to the application (permission level lower than 2):** he/she cannot view any directory
- **User without modification permissions (permission lower than level 6):** he/she cannot modify the list of the directories
- **User with access to the department directories properties (permission level 6 or more):** he/she can modify, delete or create new directories of his/her department. He/she *cannot* modify the properties of directories that are not assigned to any department (i.e. public). *If the user is not assigned to a department, he/she can modify no directory*
- **User with complete access to the directories (permission level 8 or higher):** he/she can modify, delete or create new directories and can assign them to a department
- **Unrecognised user:** he/she cannot modify the list of the directories. This feature is not available through the web interface

## Local Directories

While Private, Public and Department directories are meant to contain external contacts, Local Directories contain the list of the Colleagues, that is the Internal Contacts of an organization. Local Directories are always available. They are created when the administrator adds or removers users to the **users' list** in the Admin-> User Management web page.

The only way to edit the local directories is through users management. When you edit user properties, the changes are automatically reflected to the Local directories contents.

Depending on the IAS settings, there can be one Local Directory seen as a Public directory, or one Local directory for each department.

## Synchronized Directories

The contacts in Synchronized Directories are imported form an external data source. Synchronized directories can be Public, assigned to a Department, or Private, and their properties can be modified following the standard rules described above.

## VIP Directories

Public or Department directories, whether synchronized or not, can be marked as VIP. This affects the way those contacts are used in Queue Manager Enterprise.

Local directories cannot marked as VIP. Access to VIP directories follows the standard rules described above.

## Adding, Editing and Removing the Contacts

When a directory is created, you specify if its contacts can be edited by anyone by setting the **Editable** property, meaning "modifiable". The contents of an Editable directory can be edited by all the users who can **view** them.

The administrators, that is the users who can delete a specific directory, can always edit its contacts regardless the Editable flag.

To summarize:

- **Editable (modifiable) Public or Department directory:** the contacts can be added/edited/removed by all users who can view it
- **Non-Editable (modifiable) Public or Department directory:** the contacts in these directories can be added/edited/removed only by users that have the right permission to modify or delete that very directory

## Exceptions

- **Local directories** (that is, the Colleagues directories) are always read-only. The contents of local directories can only be modified through the IAS User Management.

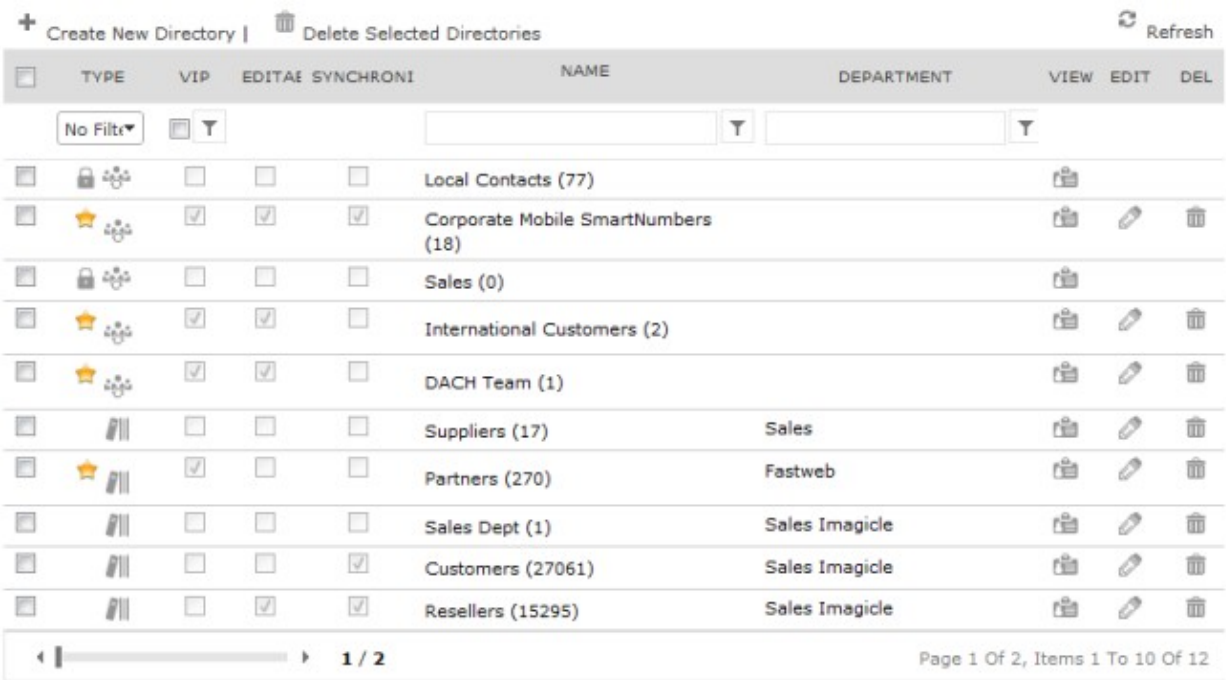
- If a directory is **Synchronized** with an external data source, the only way to add, edit or remove the contacts is working on the source. Therefore, the contents are read-only from the Contact Manager users' perspective.
- **Private directories** contents can always be modified by the owner and by no one else.
- In any case, **not recognized users** are unable to modify the contacts in any directory.

## Examples

### Example 1

User Mario Bianchi has permission level 2 for Contact Manager application and belongs to the Sales department.

The administrator created the following directories:




User Mario Bianchi can see all the public directories (the ones with a blank department field). He can also see the Sales directory ("Suppliers") but has no access to the "Partners" directory.

He can then edit the contacts of those directories which have been configured as "user customisable" (editable) by the administrator, for example the International Customers directory. Of course, users cannot edit the contacts of the directories that they can't see.

### Example 2

If Mario has permission level 6 and belongs to the department "Sales Imagicle".

He can see all public directories and his department directories. He cannot see "Sales". He can edit the contacts of all directories he can see that are user customisable (modifiable).

With permission level 6 Mario has full control over the directories that belong to his own department ("Sales Imagicle"), which means that he can view, modify, delete or create new directories for his department and edit contacts for them, whether the directories are modifiable or not.

### Example 3

Mario has permission level 8 or higher. He has full control on all directories (as the administrator) regardless of which department they belong to and of the modifiability of the directories. But Mario cannot edit the contents of the Local and Synchronized directories.

# License Activation

Contact Manager Enterprise is licensed per user.

All the feature are active for all the people in the user management list, so you must buy a license which size is at least equal to their number.

Contact Manager provides access to the internal contacts ("colleagues list") for Imagicle Attendant Console. This feature is enabled even if Contact Manager is not licensed or evaluation is expired. You can manage internal contacts through the users' magement section of the web interface. The CuCm directory is also displayed.

## Evaluation

Contact Manager will run for 30 days in evaluation mode. During evaluation, Contact Manager features (internal directory, corporate directories, syncronization, click to call, caller ID) will be available for a maximum of 250 users.

## How to activate the license

The license can be activated by purchasing the product from Imagicle. You can enable the license in the license page as described in the Application Suite common configuration section of this guide.

To activate the license, follow the standard procedure you can find in the General configuration section.