

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 phone 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

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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**