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PRODUCT
GUIDE

Mitel InAttend

Directory Manager User Guide

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Contents

1 Getting Started.....	1
1.1 About the Manual.....	1
1.2 Launching Directory Manager.....	1
1.2.1 Directory Manager – Security Restrictions.....	1
1.3 Logging In.....	2
1.4 Logging Out.....	3
1.5 Basic Functions.....	4
1.5.1 Filling in fields.....	4
2 Searching.....	7
2.1 Search Record.....	7
2.2 Search Record/Org.....	8
2.3 Quick Search.....	10
2.4 Searching for Records from the Search Page in a Search Field.....	11
2.5 Advanced Search.....	13
2.6 Record Lists from Searches.....	13
3 Managing User Records.....	15
3.1 New Record.....	15
3.2 Form Overview.....	16
3.3 Main Form.....	17
3.4 Field Descriptions.....	18
3.5 Phonetics.....	21
3.5.1 Creating New Phonetics.....	22
3.5.2 Changing a phonetic.....	23
3.5.3 Deleting a phonetic.....	23
3.6 Alternative Names.....	23
3.6.1 First name.....	23
3.6.2 Last name.....	24
3.6.3 Miscellaneous.....	25
3.7 Organization.....	26
3.7.1 Adding an Organization.....	26
3.7.2 Searching and Adding.....	27
3.7.3 Setting the Priority Field.....	28
3.7.4 Changing an Organization.....	29
3.7.5 Deleting an Organization.....	29

3.8 Keywords.....	29
3.8.1 Adding a New Keyword.....	30
3.8.2 Search and Add Keyword from Existing Keyword Register.....	31
3.8.3 Changing a Keyword.....	32
3.8.4 Deleting a Keyword.....	33
3.8.5 Deleting All Keywords from a User Record.....	33
3.8.6 Moving keywords in DM top or bottom.....	33
3.9 Recurring Activity.....	34
3.9.1 Creating a New Recurring Activity.....	34
3.9.2 Displaying a Recurring Activity in the Calendar.....	36
3.9.3 Changing a Recurring Activity.....	36
3.9.4 Deleting a Recurring Activity.....	37
3.10 Settings.....	37
3.10.1 Messaging Systems.....	38
3.10.2 Message waiting.....	39
3.10.3 Workgroup administrator.....	39
3.10.4 Name directory.....	39
3.10.5 Organization directory.....	39
3.10.6 Enable name search.....	39
3.10.7 Enable search in CMG Web.....	40
3.10.8 Delete password in CMG Web.....	40
3.10.9 Calendar synchronization.....	40
3.11 CMG Speech.....	40
3.12 Group Changes.....	43
3.13 Change Form.....	45
3.13.1 Creating a New Change Form.....	45
3.13.2 Deleting a Change Form.....	47
3.13.3 Copying a User Record.....	48
3.14 Templates for New User Record.....	49
3.15 Deleting a User Record.....	49

4 Managing Organizations.....52

4.1 Introduction.....	52
4.1.1 Creating a New Organization.....	55
4.1.2 Creating a New Unit.....	57
4.1.3 Editing the Name of a Unit.....	58
4.1.4 Moving a Unit in the Tree within the Same level.....	58
4.1.5 Moving a Unit to Another Level in the Tree.....	58
4.1.6 Deleting a Unit from the Tree.....	59
4.1.7 Undoing Changes.....	60
4.1.8 Searching an Organization.....	61

5 Managing Keywords.....63

5.1 About Keywords.....	63
-------------------------	----

5.1.1 Adding a New Keyword.....	63
5.2 Searching for Keywords.....	65
5.3 Viewing User Records Linked to Keywords.....	67
5.4 Changing a Keyword.....	68
5.5 Deleting a Keyword.....	69
5.6 Undoing Keyword changes.....	71

6 Managing Templates..... 72

6.1 Creating a New Template.....	72
6.2 Using a Template.....	73
6.3 Editing a Template.....	74
6.4 Deleting a Template.....	75

7 Managing Printouts..... 76

7.1 Printing an Existing List.....	76
7.2 Creating Custom Printout Templates.....	77
7.3 Creating a New Custom Printout.....	78
7.4 Editing Printouts.....	80
7.5 Merging Fields in a Printout.....	81
7.6 Resorting the Order on the Printout.....	82
7.7 Deleting a Printout.....	82

8 Settings.....84

8.1 Colors and Fonts.....	84
8.1.1 Changing Font, Size and Color.....	84
8.2 Custom Layouts.....	85
8.2.1 Creating a Custom Layout.....	85
8.2.2 Editing custom Layouts.....	88
8.2.3 Merging Fields in a Custom Layout.....	89
8.2.4 Re-sorting results Order of Custom Layouts.....	90
8.2.5 Deleting a Custom Layout.....	91
8.3 Miscellaneous.....	91

9 Quick Info Manager..... 93

9.1 Managing Directories.....	93
9.1.1 Creating a Text Field Directory.....	93
9.1.2 Creating a Bulletin Board Directory.....	96
9.1.3 Creating a New Free Text Directory.....	101
9.1.4 Editing Directories.....	105
9.1.5 Deleting Directories.....	106
9.1.6 Exporting and Importing Directories.....	107
9.2 Managing Records.....	110

9.2.1 Adding a New Record to a Text Field Directory.....	110
9.2.2 Adding a New Record to a Bulletin Board Directory.....	111
9.2.3 Adding a New Record to a Free Text Directory.....	112
9.2.4 Editing a Record.....	114
9.2.5 Deleting a Record.....	115

10 Shortcuts..... 116

10.1 CMG DM Shortcuts.....	116
10.2 Search View (F9) Shortcuts.....	116
10.3 Record List View (F10) Shortcuts.....	116
10.4 Record Layout Shortcuts.....	117
10.5 Main Form Shortcuts.....	117
10.6 Phonetics Shortcuts.....	117
10.7 Organization Shortcuts.....	118
10.8 Keywords Shortcuts.....	118
10.9 Recurring Activity Shortcuts.....	118
10.10 Organization Administration Shortcuts.....	118
10.11 Keywords Administration Shortcuts.....	118
10.12 Color Description.....	118

Getting Started

1

This chapter contains the following sections:

- [About the Manual](#)
- [Launching Directory Manager](#)
- [Logging In](#)
- [Logging Out](#)
- [Basic Functions](#)

This section provides information on getting started with CMG Directory Manager.

1.1 About the Manual

This manual describes how to use CMG Directory Manager (CMG DM), including the different functions and settings.

Some functions may vary due to settings defined on the CMG Server or in the call managers. Variations can also be caused by the structure of the CMG database (e.g., organization management).

The system allows you to configure most settings as you see fit. If a layout or a setting in this manual does not correspond with your system's appearance or behaviour, this is probably due to a local configuration.

1.2 Launching Directory Manager

CMG DM is a web-based application, which means that there is no special software for DM on your computer. You access DM from your web browser.

Start by launching your web browser. Enter the address for Directory Manager in the address bar. The address is <http://<servername>/CMG.DM>.

1.2.1 Directory Manager – Security Restrictions

From CMG 8.5 version, the following characters are permanently restricted in DM application, these are malicious characters that can be used to hack the system. Hence, you are not allowed to use these characters.

<		;	"	&#
---	--	---	---	----

Note:

“&#” as a combination is not allowed. “&” and “#” as single characters are still allowed.

There are some other special characters that are not allowed in DM 8.5 version by default. But, you can choose to allow these characters or restrict it in CMG CM application.

To configure the list of allowed and restricted characters, do to **CMG Directory Manager > Parameters > ExceptionCharactesList**.

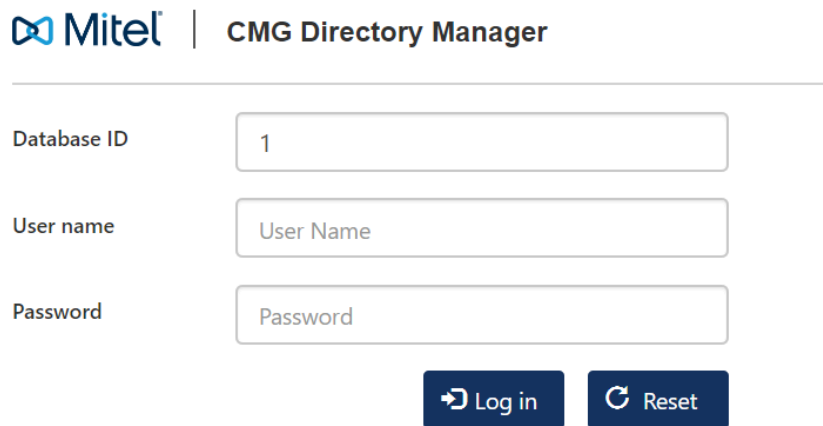
Parameter	Value	Description
ActiveOrgtreeIncluded	ENABLED	Defines whether or not ActiveX component for Administrative Orgtree is included.
autoCapitalizeName	no	Defines whether or not the name fields will be capitalized automatically. Can be overridden by the user.
ExceptionCharactesList		Defines list of Special Characters that should be allowed in DM Application Entries. By Default all these Special Characters are not allowed.
masFormFetchCount	15	Defines number of subscriber main forms to be prefetched once the search is completed or when a form is opened.
masOrgFetchCount	100	Defines the maximum number of organizational units to fetch first after login.
masSubjectFetchCount	10	Defines the maximum number of keywords to fetch when searching for keywords.
QuickInfoIncluded	yes	Defines whether or not Quick Info Manager is included.
ReceptionMisc	DISABLED - Not in Use	Defines the field containing the reception information.

Note:

You cannot create new records or update an existing record if any of the restricted characters are included in the fields. Therefore, you must look for these characters in your records and remove these characters and save your changes.

1.3 Logging In

The login dialog is displayed:



Mitel | CMG Directory Manager

Database ID

User name

Password

In the Login dialog, do the following:

1. Enter your user name.

The username and password are created by CMG's system administrator. You cannot log in without a username; a password is recommended but is not required.

2. Enter a password (if required).

The password is masked by a row of asterisks (*****).

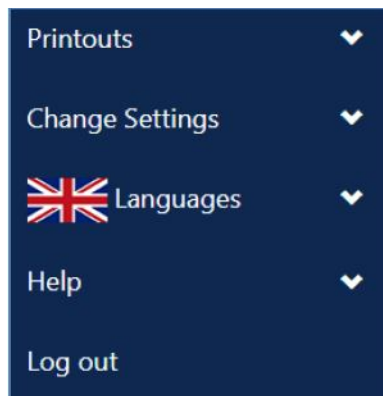
3. Click **Log in**.

If you entered the wrong user name or the wrong password, an error message appears on the screen. Clear the fields and enter the correct data.

If Advanced Security is enabled in Configuration Manager, you may encounter certain error messages when trying to log in. For example, your account may be locked or expired, or the password may have to be changed or may not meet the security requirements.

1.4 Logging Out

You can log out from DM from the side bar on the left side of the window. If you do not actively log out, the system logs you out automatically after a given number of minutes. The time interval is configured on CMG Server (default is 60minutes). You are also logged out when you close the web browser.



1.5 Basic Functions

1.5.1 Filling in fields

You can move between fields in the DM interface by pressing the **Tab** key on your keyboard (to go forward), or the **Shift + Tab** key (to go backward).

1.5.1.1 Text fields

Text boxes can be empty or filled in. They can contain one or more rows.

1.5.1.2 Empty text field

Enter text in the field.

1.5.1.3 Field containing text

When you come to a text box containing text, all of the text is highlighted in blue. If you start typing immediately, the existing text is cleared. If you want to edit the existing text, you must start by pressing an arrow key. The text is then de-selected, and you can position the cursor where you want to edit the text.

Press the **Return** key to save the information.

1.5.1.4 Drop-down list

This field contains a list of options that you can select. There are several ways of selecting options from the list:

- Use the Down arrow key if you want to move down the text and the Up arrow key to move up the text (one option at a time is shown).

- Press F4 to bring up a list of all options for which there is room on screen. Continue to scroll to other options using the up/down arrow keys. Select options with the Up or Down arrow key respectively. When the option you desire is selected, press Tab to move on to the next field.
- Enter the first letter of the option you require. If there are several options that begin with the same letter, press the letter until the correct option has been selected.

1.5.1.5 Check-box

A check-box can be selected or de-selected, and represents an option that you can enable or disable. If the check-box field is selected (thin dotted border) you can press the Space bar to select or de-select the check-box.

1.5.1.6 Function key

The function key has a specific task and a name that describes the key's function, for example F9 (Search record) or Ctrl + S (Save).

1.5.1.7 Editing text

If a field is empty, type in the text directly. If the field contains text, this will be highlighted in blue when you reach the field. If you start writing when the text is highlighted, the previous text will disappear completely. Deselect the text by pressing one of the Arrow keys.

If you need to edit the text you have written, move the cursor using the Arrow keys. Position the cursor where you want to make the change. The text to the right of the cursor is automatically moved to the right when you enter new text.

1.5.1.8 Keyboard shortcuts

In DM you can use keyboard shortcuts instead of using the mouse. See the list of the various keyboard shortcuts at the end of this manual. You can also find the list of keyboard shortcuts in DM under **Help -> Keyboard shortcuts**.

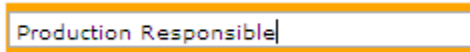
1.5.1.9 Color description

When adding, modifying or delete information, the changes are shown in different colors as described below. The changes are applied after pressing the Save button (Ctrl+S).

- Yellow - When adding new information, the field turns yellow:

A screenshot of a text input field with a yellow border, containing the word "Sales".

- Orange - When changing existing text, the field turns orange:



Production Responsible

- Red - When removing information, the field turns red and a line is run through the text:



Bowling Club

Make sure you save as soon as you have changed any information. The new/changed information does not take effect until you save it.

1.5.1.10 Note about this manual

Underscore (“_”) is used in this manual to describe a space. This symbol appears, for example, in various name searches.

Searching

2

This chapter contains the following sections:

- [Search Record](#)
- [Search Record/Org](#)
- [Quick Search](#)
- [Searching for Records from the Search Page in a Search Field](#)
- [Advanced Search](#)
- [Record Lists from Searches](#)

This section contains information related to the search function in DM.

2.1 Search Record

When you log in, DM opens with the **Search record** page. Here you can find registered information using various search methods.

The screenshot shows the Mitel CMG Directory Manager interface. On the left is a dark blue sidebar with the Mitel logo and various navigation links. The main content area is titled 'Search record' and contains a search form. The form has a 'Search' button and a 'Clear' button. Below these are several input fields for searching records, including 'Last name', 'First name', 'Phone', 'Mobile', 'Alt.ext.1', 'Alt.ext.2', 'Organization tree' (which shows a tree view with 'Mitel1' selected), 'Information', 'Title', 'Workgroup', 'Field2', 'Field4', 'Field6', 'Field8', 'Field12', 'Field14', 'Field17', 'Keywords', 'Room', 'Field1', 'Field3', 'Field5', 'Field7', 'Field9', 'Field13', 'Field16', and 'E-Mail'.

When the page appears, you go automatically to the last name field. Just as in the Attendant client, you can search by the whole name (Last name First name), parts of the name or by first name only (or part of the first name). The search includes phonetic similarities.

You can also search using an asterisk (*). For example, *son generates hits for everyone with a last name that ends in –son. You can press F9 to go direct to the Search record screen.

The screenshot shows the Mitel CMG Directory Manager interface. On the left is a sidebar menu with options like 'Select directory', 'Quick search', 'Records', 'Search record F9', 'Advanced Search', 'Main Form', 'New record', 'Organization', 'Keywords', 'Name alternatives', 'Quick Info Manager', 'Templates', 'Printouts', 'Change Settings', 'Languages', and 'Help'. The main area displays a 'Record list' table with columns for 'Full Name', 'First Name', 'Phone', 'Organization', and 'Title'. The table contains 24 records, all with 'User' as the first name and 'Senior Software Engineer' as the title. The organization is 'Mitel1' for all records. The interface also includes buttons for 'Select All', 'Delete selected', and 'Change selected' at the top of the table.

Full Name	First Name	Phone	Organization	Title
3501	User	3501	Mitel1	Senior Software Engineer
3502	User	3502	Mitel1	Senior Software Engineer
3503	User	3503	Mitel1	Senior Software Engineer
3504	User	3504	Mitel1	Senior Software Engineer
3505	User	3505	Mitel1	Senior Software Engineer
3506	User	3506	Mitel1	Senior Software Engineer
3507	User	3507	Mitel1	Senior Software Engineer
3508	User	3508	Mitel1	Senior Software Engineer
3509	User	3509	Mitel1	Senior Software Engineer
3510	User	3510	Mitel1	Senior Software Engineer
3511	User	3511	Mitel1	Senior Software Engineer
3512	User	3512	Mitel1	Senior Software Engineer
3513	User	3513	Mitel1	Senior Software Engineer
3514	User	3514	Mitel1	Senior Software Engineer
3515	User	3515	Mitel1	Senior Software Engineer
3516	User	3516	Mitel1	Senior Software Engineer
3517	User	3517	Mitel1	Senior Software Engineer
3518	User	3518	Mitel1	Senior Software Engineer
3519	User	3519	Mitel1	Senior Software Engineer
3520	User	3520	Mitel1	Senior Software Engineer
3521	User	3521	Mitel1	Senior Software Engineer
3522	User	3522	Mitel1	Senior Software Engineer
3523	User	3523	Mitel1	Senior Software Engineer
3524	User	3524	Mitel1	Senior Software Engineer
3525	User	3525	Mitel1	Senior Software Engineer
3526	User	3526	Mitel1	Senior Software Engineer
3527	User	3527	Mitel1	Senior Software Engineer
3528	User	3528	Mitel1	Senior Software Engineer
3529	User	3529	Mitel1	Senior Software Engineer
3530	User	3530	Mitel1	Senior Software Engineer
3531	User	3531	Mitel1	Senior Software Engineer

2.2 Search Record/Org

The **Search Record/Org** menu allows you to search for departments in the organization, to expand the entire tree and to see which users belong to a given department.

The screenshot shows the 'Search record / org' interface. It has buttons for 'Select All', 'Delete selected', and 'Change selected'. The table has columns for 'Name', 'Phone', and 'Title'. The 'Name' column is expanded, showing a tree structure with 'Sales' and 'Smith Olga'. The 'Phone' column shows '7897 False' and '6772 False'. The 'Title' column is empty. The interface also includes a 'tot: 2 (2)' indicator and a 'Clipboard' icon.

Name	Phone	Title
Sales		()
Affleck Rosie	7897 False	
Smith Olga	6772 False	

Search

The Search button lists the organization's users, grouped by department.

The screenshot shows the 'Search record / org' interface. It has buttons for 'Search', 'Clear', '+', and 'Search org'. The table has columns for 'Name' and 'Title'. The 'Name' column is expanded, showing a tree structure with 'Mitel1', 'Management', 'Sales', 'Marketing', and 'Marketing'. The 'Title' column is empty. The interface also includes a 'Clipboard' icon.

Name	Title
Mitel1	
Management	
Sales	
Marketing	
Marketing	

Group Changing

Save Cancel

1. Select target

☒ Selected <1 Records> ☐ All in selected directory < all COMPANY01 >

2. Select field

Select in the list...

3. Select method

☒ New value ☐ Copy from field ☐ Move from field

4. Enter a new value

You can make changes to a whole group of users/user records using the **Change group** function. You can also delete users. See section 3 (Managing user records) for more information.

Clear

The **Clear** button allows you to return to the original **Search Record/Org** screen. This is useful if you have expanded the tree by too many steps and want to go back without starting again from the beginning. No information is lost if you click the **Clear** button.

+

The **+** button expands all of the tree's sub-levels from your current position (i.e., the element of the tree that is selected). Note that all sub-levels are expanded.

Search org

The **Search org** button allows you to search for a specific department in the organization tree. When you click the button, a dialog box appears in which you enter the name of the unit. It is sufficient to enter only part of the name; if there are several departments that start with the same characters, all are shown.

The search results appear in a list, from which you can select the department that you want to see. If you click the unit name or select the unit and click the **OK** button, the unit's location is shown in an expanded organization tree.

You can also filter your search in the tree by defining a filter. This allows you to search in the **Org 1** and **Org 2** fields as well as in empty fields.

The screenshot shows a dialog box titled "Organization". Inside, there is a section labeled "Search organization". Below this, there is a text input field for the search query. To the right of the input field is a "Select filter" dropdown menu, which currently shows "Organizatic" with a downward arrow. Below the input field and dropdown, there is a checkbox labeled "Alphabetical Order". At the bottom right of the dialog, there are three buttons: "Search", "Reset", and "Close".

2.3 Quick Search

Searches can be performed from the **Quick search** field in the side bar. Alt+1 is the keyboard shortcut to move the cursor to the quick search field.

The screenshot shows a "Quick search" field in a sidebar. The top bar of the field contains the text "Quick search" and the keyboard shortcut "Alt+1". Below this is a search input field. At the bottom of the field, there is a prompt that says "...press enter".

A quick search is a search for records with reference to a number of predefined fields. This means that if there is a match in any of the fields, the record is displayed.

The fields searched are:

- Last Name
- First Name
- Extension
- Mobile
- Organization Name.


If you enter a numerical value in the search field, the phone number and mobile phone number fields are searched. When searching by name, the search format is last_name_first_name or parts of last_name_first_name.

You can also search by first name only, by starting with a space: _first_name.

For example, a search for "And" returns results that include both "Andersson" as a last name and "Anders" as a first name.


You can also configure quick search so that any field in CMG DM is searchable.

To view all the records, enter “*” in the search field. Records can be more than what is displayed per page. Click the more icon as shown in the screen-shot below, and this will navigate you to the next page.

Record list					tot: 5 (5)	
Select All		Delete selected		Change selected		 << >>
Last Name	First Name	Phone	Organization	Title		
Affleck	Rosie	1008	Mitel1			
Affleck	Rosie	1008		Marketing assistant		
Affleck	Rosie	1080	Marketing	Marketing Assistant		
Affleck	Rosie	1080				
Affleck	Rosie	7897				

2.4 Searching for Records from the Search Page in a Search Field

You can search on any field in the **Search page**. The following table summarizes the information you can search on and in which fields.

Field	Description
Last name	<p>Search by last name. The number of results returned depends on how specific you are when defining the search term. Phonetics is observed when searching.</p> <div>  Note: <p>You can search by last name AND first name in the last name box, as when making attendant searches in the Attendant client. If you want to search by first name only in the last name box, press the space bar and enter the beginning of the first name.</p> </div>
First name	Search by first name. The number of results returned depends on how specific you are when defining the search term. Phonetics is observed when searching.

Field	Description
Phone number	Search by phone number or extension number. If you enter * all records appear that have any data in the phone number field.
Organization tree	Search by the organization name in a tree structure. When the selection is made, the records entered under each organization and any sub-departments appear.
Organization	Search by unit in the organization. Phonetics is observed when searching.
Org 1	Search by an alternative designation for the organization. If you enter * all records that have any data in that field appear.
Org 2	Search by an alternative designation for the organization. If you enter * all records that have any data in that field appear.
Keywords	Search by keyword. If you enter * all records that have any data in that field appear.
Fields 1- 14	Other searchable fields can be defined as desired.

Select **Search** to find records based on search options entered (or press Enter).

Select **Clear** to restore the search page to its original setting (Alt+R).

2.5 Advanced Search

The screenshot shows the 'Advanced Search' window in the Mitel CMG Directory Manager. On the left is a sidebar with the Mitel logo and navigation links. The main window has a 'Form type' section with checkboxes for 'Active form', 'Future form', and 'Change form'. Below this are four criteria rows, each with a 'Select field' dropdown, a 'Contains' dropdown, and a text input field. At the top right, there are radio buttons for 'Meets all criteria' (selected) and 'Meets some criteria'.

With an advanced search, you can make a more specific selection in your search.

In the top row you can define whether you want all of your search conditions to be met or whether one of them is sufficient. You can then define which fields are to be searched, selecting the fields in the first column with the aid of a scroll-down list.

In the second column you enter the conditions defining how the search terms are to be interpreted: that is, if a field contains a given item of information; if a field contains precisely the information you enter; or if a field starts or ends with a given item of information. You can also search by empty fields.

If the search does not return any results, your search criteria are cleared, and you must start again with new search criteria.

2.6 Record Lists from Searches

The search fields for which you have entered a search term are presented in a results list, in addition to which Name, Phone number, Organization and Title are always displayed. You can configure which fields are shown by default in the results list. To return to the last search results, record list, press F10.

A record list can contain a maximum of 1,000 users at a time. To proceed to the next 1000 records, click the double arrows (>>) in the top right-hand corner of the screen.

Record list					tot: 5 (5)	
Select All		Delete selected		Change selected		
Last Name	First Name	Phone	Organization	Title		
Affleck	Rosie	1008				
Affleck	Rosie	1008	Mitel1			
Affleck	Rosie	1080		Marketing assistant		
Affleck	Rosie	1080		Marketing Assistant		
Affleck	Rosie	7897	Marketing			

Managing User Records

3

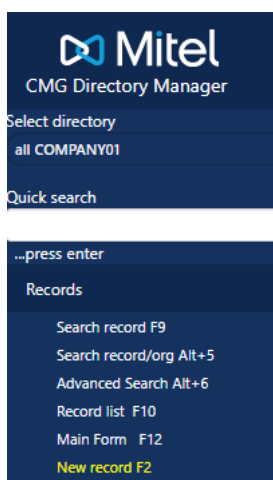
This chapter contains the following sections:

- [New Record](#)
- [Form Overview](#)
- [Main Form](#)
- [Field Descriptions](#)
- [Phonetics](#)
- [Alternative Names](#)
- [Organization](#)
- [Keywords](#)
- [Recurring Activity](#)
- [Settings](#)
- [CMG Speech](#)
- [Group Changes](#)
- [Change Form](#)
- [Templates for New User Record](#)
- [Deleting a User Record](#)

This section contains information about adding, deleting and updating user records, and how to manage groups of records.

3.1 New Record

When you want to add a new record to the database, click **New Record** (F2) under the **Records** heading in the side bar.

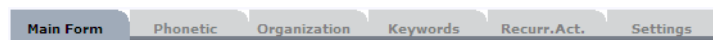


An empty form appears, where you can enter information.

3.2 Form Overview

Every record in the database consists of a form with seven tabs (six if you do not have CMG Speech):

- Main Form
- Phonetic
- Organization
- Keywords
- Recurring Activity
- Settings



There are various toolbar buttons at the top of each tab. The following toolbar buttons are in the top right-hand corner of all tabs.



Button	Description
Save (Ctrl + S)	Saves all page in the form.
Reset (Alt + R)	Undoes your changes. Everything that is yellow, orange or red is restored.
<< (F7)	Goes to the previous record in the list.
>> (F8)	Goes to the next record in the list.
X	<p>Closes the tab.</p> <p>This function is not enabled in the main form. If you close a tab it will not be loaded when you search for a user. This can make the software a little faster. To enable a closed tab, click it. Closed tabs turn white and are moved to the right.</p>

3.3 Main Form

In the **Main Form** tab, you register information such as Name, Phone number, Title, and so on. All fields are adaptable and can be renamed to suit your own requirements. The form's layout can also be adapted so that the fields are placed in a specific sequence. All fields are searchable and are visible to office users in CMG Web.

To move the cursor between the fields, press the Tab key.

The screenshot displays the 'Main Form' tab for a user record titled 'Affleck Rosie (1080)'. The form is organized into several sections:

- Top Bar:** Includes tabs for 'Main Form', 'Phonetic', 'Organization', 'Keywords', 'Recurr.Act.', and 'Settings'. Action buttons include 'Copy', 'Delete', 'New change form', 'Save', 'Reset', '<<', '>>', and 'X'.
- User Information:**
 - Sign niceadmin:** Last name: Affleck, Phone: 1080, Main record: ☒, PBX ID: PBX1, Organization: Org 1.
 - Act Date:** 22/04/2019
 - Deact Date:** 22/04/2019 (with a note 'Until further notice')
 - First name:** Rosie, Mobile: [field], Cust.grp: CUSTGRP1, Alt.ext.1: [field], Alt.ext.2: [field].
- Keywords and Title:**
 - Keywords:** Title: Marketing Assistant
 - Workgroup:** [field]
- Additional Fields:** A series of numbered fields (Field2 to Field17) for further data entry.

In the top left-hand corner are the toolbar buttons that are specific to the **Main Form** tab.

Button	Description
Copy	Copies the current form. See section 3.13.3 for more information.
Delete	Deletes the current form. See section 3.15 for more information.
New Change Form	Creates a change form. See section 3.13 for more information.

3.4 Field Descriptions

Field names and layouts can be adapted. This description describes a default setting. The form and the field names may be different in your system.

Field Name	Description
Signature	Signature of the person who last changed the form is displayed.
Change date	Date when the form was last changed.
From	Start date for the form (i.e., form is valid as from this date).The user record is not visible to the attendant before this date.
Until	End date for the form. By default, a form is valid until further notice.Enter a date to have the form deleted on a specific date.
Last name	User's last name (up to 60 characters).This field is searchable by the attendant.
First name	User's first name (up to 60 characters).This field is searchable by the attendant.

Field Name	Description
Tel. no	<p>User's extension number (up to 60 characters). If there is no extension number you can enter an external phone number. The field is searchable by the attendant.</p> <p>If you define a number as secret, an indication (strikethrough text) is displayed to the attendant.</p> <p>This is used for example, if the number may not be distributed.</p>
Mobile	<p>User's mobile phone number (up to 60 characters). The field is searchable by the attendant.</p> <p>If you define a number as secret, an indication (strikethrough text) is displayed to the attendant. This is used, for example, if the number may not be distributed.</p>
Main record	<p>Indicates whether or not this user is the primary user of a shared extension.</p> <p>If several users are associated with an extension number (shared extension), one of the users is defined as the extension's main user. When an attendant receives a call that is forwarded from a shared extension, the main user is displayed as receiver of the call.</p>
List	<p>Indicates whether or not a list of all users associated with a shared extension should be presented to the attendant.</p> <p>When an extension to which several users are associated (shared extension) receives a call and the call is forwarded to an attendant, the attendant can be presented with a list of all users associated to the extension.</p> <p>This is initiated by enabling the list function for the extension's main user. If disabled, only the main user's record is displayed to the attendant.</p>

Field Name	Description
PBX ID	<p>Identifies the PBX associated with the extension.</p> <p>If you have several PBX connected to the CMG system, each extension must be linked to the right PBX. For user records without extension numbers, select “None”.</p> <p>If several people share an extension, only the user record selected as the main record should have an extension link, others should have “None”.</p>
Alternative Extension 1 / Alternative Extension 2	<p>Allows you to register alternative extensions for the record, for example of a colleague who can take calls if the user is not available.</p> <p>Enter the person’s extension number. The name is retrieved automatically from the database when the attendant searches in the Attendant client, using the “Show Alternative Extension” function.</p>
Customer group	Identifies which customer group the user record is to belong to. Only used in large systems when there are attendants at several sites, or if several companies share the same CMG system.
Organization, Org1, Org2	The organization to which the user belongs. The organization is added under the Organization tab. See section 4 for more information.
Information	Additional details (up to 510 characters) about the user. The information is visible to the attendant in all search views.
Keywords	Keywords registered for the user record. The keywords are searchable for the attendant. For more information, see section 5.
Title	User’s title or position (up to 60 characters).
Room	User’s physical location (room, floor, etc, up to 60 characters). This field is searchable by the attendant.
Empl. No.	User’s employee number (up to 60 characters).

Field Name	Description
Workgroup	<p>User's workgroup name (up to 60 characters).</p> <p>The workgroup function is used if you want users to be able to register activities for one another in CMG Web.</p> <p>Each group must have a unique name. The user or users who is or are to be administrator(s) for the workgroup must have the box selected.</p>
Alt. Dept.	Alternative sort for lists in CMG Directory Manager or directories in CMG Phonebook.
ID Card	<p>User's pass card number if there is a link between the time reporting system and the CMG system.</p> <p>If there is no such link, you can use the field for any purpose.</p>
Field 1/Field 3	Adaptable fields that can be renamed and are searchable by the attendant.
Other field	Adaptable field that can be renamed.

3.5 Phonetics

The **Phonetic** tab allows you to register alternative spellings of the first and last names. The phonetic alternatives are searchable by the attendant and office users but are not shown.

The user's correctly-spelled name is automatically shown here. If automatic generation of phonetics is enabled, certain name options are created automatically when you save the form.

The screenshot displays the 'Phonetic' tab for a user named 'Affleck Rosie (1080)'. The interface includes a top navigation bar with tabs: 'Main Form', 'Phonetic', 'Organization', 'Keywords', 'Recurr.Act.', and 'Settings'. Below the navigation bar, there are buttons for 'New Last Name' and 'New First Name'. A 'Show autogenerated names' checkbox is checked. The 'Last Name' field contains 'Affleck' and has a 'Use When Sorting' checkbox. The 'First Name' field contains 'Rosie' and also has a 'Use When Sorting' checkbox. At the bottom right, there are buttons for 'Save', 'Reset', '<<', '>>', and 'x'.

In the top left-hand corner are the toolbar buttons that are specific to the Phonetic tab.

Button	Description
New Last Name (Alt + E)	Adds new alternative last name.
New First Name (Alt + F)	Adds new alternative first name.

The **Show auto-generated names** option enables the CMG 7.5 function that auto-generates phonetic spelling options for Last name and First name.

To the right of an auto-generated name is the text auto. You can choose not to show these names by not checking the box. This also depends on the **ShowPhonetics** function being enabled under **Change Settings – General**.

3.5.1 Creating New Phonetics

To register a new phonetic spelling for a user name, do the following:

1. Click the **New Last Name** button or the **New First Name** button.

The image shows two overlapping dialog boxes. The left dialog box is titled "New Last Name" and has a text input field. The right dialog box is titled "New First Name" and also has a text input field. Both dialog boxes have "ok" and "Cancel" buttons at the bottom.

2. Enter the alternative name in the dialog box.
3. Click **OK** or press Enter. The new phonetic alternative is highlighted in yellow.
4. Click **Save**.
5. In the **Phonetic** tab, select the **Use When Sorting** option to identify which spelling alternative the CMG system should use to sort user records.

This is used when printing lists or directories, for example, if you want to group all alternate spelling options for “Karlsson” at the same place in the directory. If the user spells his name “Carlsson”, make sure that the phonetic alternative “Karlsson” is there and has the **Use When Sorting** option enabled.

3.5.2 Changing a phonetic

To change a phonetic entry, do the following:

- 1. Click in the field containing the phonetic that you want to change.
- 2. Enter the new text.
- 3. The keyword is highlighted in orange to indicate that you have changed it.
- 4. Click **Save** to confirm the change.

3.5.3 Deleting a phonetic

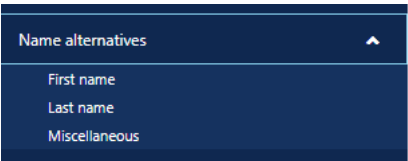
To delete a phonetic entry, do the following:

- 1. Click in “X” beside the field containing the phonetic that you want to delete.

The keyword is highlighted in red to indicate that you want to delete it.
- 2. Click **Save** to confirm the deletion.

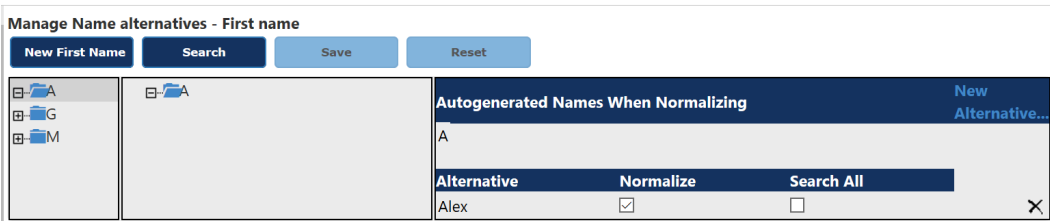
3.6 Alternative Names

If you want to edit the alternative names the system has generated as phonetic alternatives, click the **Name alternatives** heading in the sidebar.



To edit or add first name or last name alternatives, select the appropriate link in the sidebar.

3.6.1 First name



Under **First Name**, you can specify which name alternatives a first name should generate. If any of the names below the line is written in the head form, the system generates the names under “autogenerated names” in the phonetic list for the subscriber.

New record

Main Form **Phonetic** Organization Keywords Recurr.Act. Settings

New Last Name New First Name Save Reset << >> X

Show autogenerated names ☒

Last Name	Use When Sorting
A	<input type="radio"/>
Anderson	<input type="radio"/>

First Name	Use When Sorting
A	<input type="radio"/>
Alex	<input type="radio"/>

Autogenerated Names When Normalizing [New Alternative...](#)

A

Alternative	Normalize	Search All
Alex	<input checked="" type="checkbox"/>	<input type="checkbox"/>

X

The check boxes in the **Normalize** column indicate which names should be accepted and then generate the spelling alternatives.

The check boxes in the **Search All** column control which name alternatives are considered “normal” (i.e., which names are generated in the phonetic list).

If you think that a name alternative is missing, you can add a new one by clicking the **New alternative...** link.

3.6.2 Last name

Manage Name alternatives - Last name

New Last Name Search Save Reset

A
B

A

Autogenerated Names When Normalizing [New Alternative...](#)

A

Alternative	Normalize	Search All
Anderson	<input checked="" type="checkbox"/>	<input type="checkbox"/>

X

Under **Last Name**, you can specify which name alternatives a last name should generate. If any of the names below the line is written in the head form, the names under “autogenerated names” are generated in the phonetic list for the subscriber.

Autogenerated Names When Normalizing			New Alternative...
A			
Alternative	Normalize	Search All	
Anderson	<input checked="" type="checkbox"/>	<input type="checkbox"/>	X

The check boxes in the **Normalize** column indicate which names should be accepted and then generate the spelling alternatives.

The check boxes in the **Search All** column control which name alternatives are considered “normal” (i.e., which names are generated in the phonetic list).

If you think that a name alternative is missing, you can add a new one by clicking the **New alternative...** link.

3.6.3 Miscellaneous

Below the **Miscellaneous** heading in the sidebar, you can see the changes you have made sorted by first name and last name.

Manage Name alternatives

Save

Reset

Regenerate name alternatives

Reset all first names

Reset all last names

First Name	Normalize	Search All
A		
New Alex	<input checked="" type="checkbox"/>	<input type="checkbox"/> Delete
G		
New God	<input checked="" type="checkbox"/>	<input type="checkbox"/> Delete
M1		
New M2	<input checked="" type="checkbox"/>	<input type="checkbox"/> Delete
Micael		
New Michael	<input checked="" type="checkbox"/>	<input type="checkbox"/> Delete

Last Name	Normalize
A	
New Anderson	<input checked="" type="checkbox"/>
B	
New Bake	<input checked="" type="checkbox"/>

By clicking the **Regenerate name alternatives** button, all the subscribers in the database are checked, and the changes made are normalized.

By clicking **Reset all first names** or **Reset all last names**, you can reset the name lists to the original setting. If you then click **Regenerate name alternatives**, all your changes are deleted.

Example: If you have a subscriber name Michael, the name Mikael is automatically generated as an alternative, as well as Micke, since we have selected it to be normalized (see figure above). Note that Micke will not generate Michael according to the definitions under First name.

3.7 Organization

The **Organization** tab is allowing you to enter the organization to which a user belongs. See section 4 for more information.

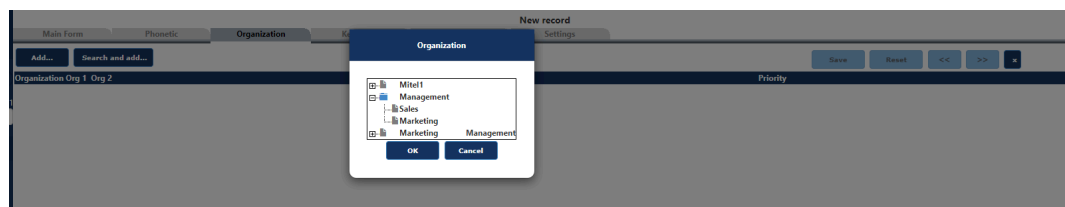
In the top left-hand corner are the toolbar buttons that are specific to the **Organization** tab.

Button	Description
Add (Alt + L)	Adds new organization.
Search and add	Searches and adds new organization.

3.7.1 Adding an Organization

To add an organization to the user record, do the following:

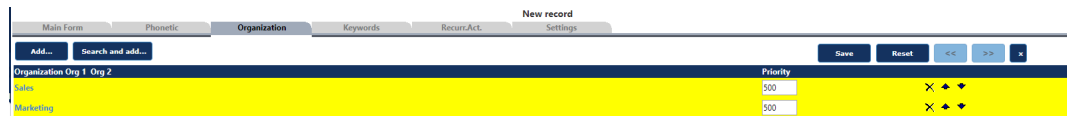
1. Click the **Add...** button. The organization tree is displayed.



2. Navigate the tree structure to the unit to which you are assigning the user.
3. Select the unit and click **OK**. The organization appears with a yellow highlight.

If a user record belongs to more than one unit, add them in the same way.

4. Click **Save** to confirm the change(s).



Note:

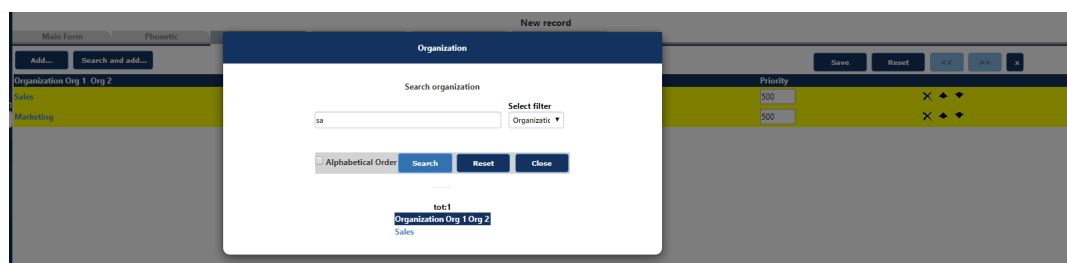
If the Organization tree is built with several root levels, then the show order in InAttend and NOW will not match the right-side org tree structure of CMG DM.

3.7.2 Searching and Adding

If you have a large organization, it may be easier to search for the unit in the organization tree.

1. Click the **Search and add ...** button.

A search window appears:



2. Enter all or part of the unit name.
3. Select which field you want to search in the **Select filter** field (Organization, Org1 or Org2).
4. Click **Search**.

The system displays the search results.

5. Select the unit that you want to add and click **OK**.

The organization appears with a yellow highlight.

6. Click **Save** to confirm the change.

3.7.3 Setting the Priority Field

You can use the **Priority** field to define the order in which the users are presented in an organization search.

User records with the same priority are sorted in alphabetical order – the lower the priority value, the higher up in the results list. For example, if you want to have the manager at the top when a search of the organization is performed, you can assign the position priority 100.

Other employees can have the standard priority 500, while faxes and modems, to which fewer calls are directed, can have priority 900. It is a good idea to give a group number a lower priority (for example 400), as this means that the main user comes higher up the list than the group's members.

Tip: Try to use the same priority values in all departments.

Example of a Priority template:

Department Manager, etc	100
Under-Manager, Foreman, etc	200
Department Secretary	300
Regular Users	500
Fax	600
Conference Room, etc	700
Low-priority areas with phone	800
Vacant phones, modems, etc	900

3.7.4 Changing an Organization

To change the organization for a user record, do the following:

1. Click the organization name (blue text) to open the organization tree.



2. Select the new unit in the tree.

The organization is highlighted in orange.

3. Click **Save** to confirm the change.

If a user belongs to more than one organization, you can change the order by clicking the up/down arrows on the far right.

3.7.5 Deleting an Organization

To delete an organization from a user record, do the following:

1. Click the “X” to the right of the organization name (blue text).
2. Click **Save** to confirm the deletion.

3.8 Keywords

The **Keywords** tab allows you to enter the user’s keywords. Keywords are words that must be searchable for the attendant and/or office user (e.g., titles and jobs).

You can search and use existing keywords from the database or add new keywords. Note that on this page you only create, change or delete keywords for one user. If you want to edit or delete keywords from the system, see section 5. In the top left-hand corner are the toolbar buttons that are specific to Keywords.

Keywords [Sort](#)

Keywords	Shown for operator	Shown for Office/CMG Web users	Shown in Phone Book	Shown in Keyword index	Tools
subject	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
marketing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
bowling club	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

In the top left-hand corner are the toolbar buttons that are specific to the **Keywords** tab.

Button	Description
New Keyword (Alt + N)	Adds new keyword to the user record.
Delete all	Deletes all keywords from the user record.

3.8.1 Adding a New Keyword

To add a new keyword, do the following:``

1. Click the **New Keyword** button.
2. Type the keyword in the **New Keyword** dialog box.

New KeyWords

account manager

OK Cancel

3. Click **OK** to save the changes.

The new keyword is highlighted in yellow on the **Keywords** tab.

Keywords	Shown for operator	Shown for Office/CMG Web users	Shown in Phone Book	Shown in Keyword index	Tools
subject	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	🔍 ✕ ⬆ ⬇
marketing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	🔍 ✕ ⬆ ⬇
bowling club	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	🔍 ✕ ⬆ ⬇
account manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	🔍 ✕ ⬆ ⬇

4. Click the up/down arrows to change the order of the keywords.

5. Enable the checkboxes in the following columns to assign the appropriate attributes to the keyword:

- **Shown for operator:** user record is searchable by this keyword for the attendant.
- **Shown for office users:** user record is searchable in CMG Web by this keyword
- **Shown in Phone Book:** specify whether the keyword is to be included in a list in Phone Book
- **Shown in Keyword index:** specify whether the keyword is to be included in the index in Phone Book

6. Click **Save** to confirm the change.

3.8.2 Search and Add Keyword from Existing Keyword Register

All Keywords are kept in a separate database. From the keyword database, you can search and add existing keywords to a user record. See section 5 for more information.

To search for a keyword in the database, do the following:

1. Click the **New Keyword** button.
2. Type all or part of the keyword in the **New Keyword** dialog box.
3. Click **OK** to save the changes.

The new keyword is highlighted in yellow on the **Keywords** tab.

- Click on the magnifying glass icon at the far right of the keyword row press the **Enter** key.

The keywords that match your search are shown in a list.

When you select a keyword in the list on the left, the names of the user records with the keyword registered are shown.

- Select the keyword(s) that you want to register. To select several keywords, hold down Ctrl and click them.
- Click **OK** to register the selected keywords for the user.

Adding keywords in this way reduces the risk of entering incorrect/misspelled versions of keywords. If you want to delete or change a keyword you must go into the Keyword register. See section 5 for more information.

Tip: Use an * (asterisk) before the word you want to search to indicate “everything that contains...” For example, if you specify “*manager”, the system returns all existing keywords that contain the word manager.

3.8.3 Changing a Keyword

To change a keyword, do the following:

- Click the field that contains the keyword.
- Delete the existing keyword and enter a new keyword.

The old keyword is removed from the user record, but remains in the Keyword register.

3.8.4 Deleting a Keyword

To delete a keyword, do the following:

1. Click the “X” to the right of the keyword field.

The keyword is highlighted in red.

2. Click **Save** to confirm the deletion.

3.8.5 Deleting All Keywords from a User Record

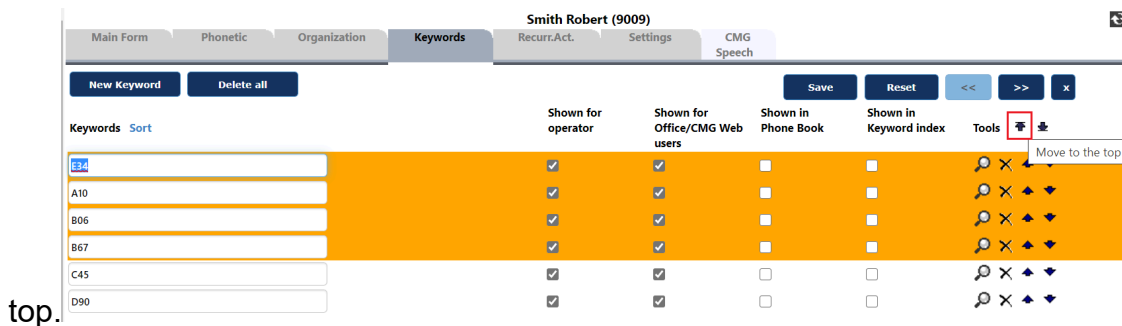
To delete all keywords from a user record, do the following:

1. Click the **Delete All** button.
2. Click **Save** to confirm the deletion.

3.8.6 Moving keywords in DM top or bottom

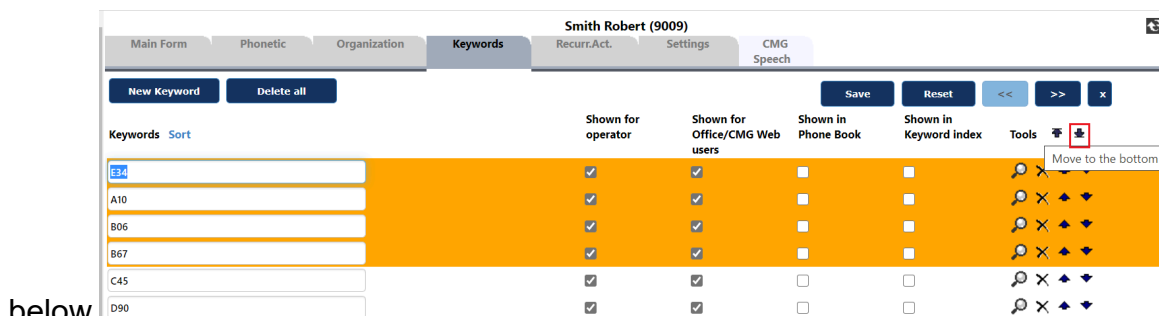
To move the keywords of user record to the top or bottom, do the following:

1. Select the desired row and click “Move to the top” button as shown in the screenshot below to move to the



top.

2. To move to the bottom, select the desired row and click “Move to the bottom” button as shown in the screenshot



below.

3.9 Recurring Activity

In the **Recurring Activity** tab, you can create schedules activities for the user that result in phone calls being forwarded automatically during a specified period (e.g., for users who work part time or have lunch at the same time every day). Users can also create recurring activities themselves in CMG Web.

The following toolbar buttons (top left-hand corner) are specific to the **Recurring Activities** tab.

Button	Description
New recurring activity	Adds a new recurring activity.
Show calendar	Shows graphical display of the calendar.

3.9.1 Creating a New Recurring Activity

To create a new recurring activity, do the following:

1. Click the **New recurring activity** button.

Recurring activity - Cruise Tom (1009)

Activity

Meeting ▼

Reset automatically ☒

Forward to

Operator ▼

The first activity

begins

Date

23/04/2019

Time

15:30

and is valid

☒

No. of days

0

Hours & Minutes

01:00

☐

Date

23/04/2019

Time

16:30

☐

Next workingday

Repeats

Every other Tuesday ▼

☐ Until further notice
 ☒ Until

23/04/2019

Notes

OK

Cancel

Reset

2. Select the activity code from the drop-down menu in the Activity field.
3. Enable or disable the **Return automatically** option. If enabled, the forward function from the phone is automatically released when the time expires, and the phone is opened.
4. Select the forwarding option from the drop-down menu in the **Forward** to field. The “No forwarding” option means that the phone is not affected by the activity message.
5. In **The first activity** area, set the following options:
 - a. In the “begins” area, set the start date and time for the activity in the **Date** and **Time** fields, respectively.
 - b. In the “and is valid” area, specify the duration of the activity by setting one of the following:
 - Number of days, hours, and minutes.
 - End date and end time of the activity.
 - Next working day (phone is automatically closed until the next working day and the standard time defined in the CMG system, 08:00).

If you set “Next working day” on a Friday, the phone is closed for the entire weekend and opened on Monday morning.

6. In the **Repeats** area, specify how often the activity is to be repeated:

- a. Specify the frequency by selecting an option in the drop-down menu.

By default, the day shown is linked to the day specified as the start day.

- b. Specify an end date for the activity, or select the **Until further notice** for no end date.

7. Optionally, include additional information in the **Notes** field. This information is visible to the attendant or office user when the form is active.

8. Click **OK** to save your changes and create the activity.

3.9.2 Displaying a Recurring Activity in the Calendar

To display recurring activities in the calendar view, do the following:

1. On the **Recurring Activity** tab, click the **Show calendar** button.

The sample screen below shows a user who has two recurring activities. The color highlight shows the activity for “Lunch” and “Gone for the day”.

The screenshot shows the 'Recurr.Act.' tab for user 'Cruise Tom (1009)'. It displays a table of recurring activities and a calendar view.

Activity	Forwarded To	The First Time	Repeats	Is Valid
Meeting	Operator	23/04/2019 15:30	nextworking day 08:00	Every workingday 25/04/2019

Below the table is a calendar view for April 2019. The calendar shows a grid of days from Monday to Sunday. The activity 'Meeting-1' is highlighted in yellow on Tuesday (23/04/2019) and Wednesday (24/04/2019). The activity 'Gone for the day' is highlighted in light green on Thursday (25/04/2019) and Friday (26/04/2019).

2. Click in the calendar on the right to change day/month, or click the arrows on the left to change the week.

3. Click the **Hide Calendar** button to close the calendar view.

3.9.3 Changing a Recurring Activity

To change a recurring activity, do the following:

1. Click on the activity entry (in the Activity column) in the Recurring Activity tab (text highlighted in blue).

The Recurring Activity dialog box opens.

2. Enter your changes to the recurring activity and click OK.

The activity text is highlighted in orange.

3. Click **Save** to confirm your changes.

3.9.4 Deleting a Recurring Activity

To delete a recurring activity, do the following:

1. Click on the “X” at the far-right side of the activity entry (in the **Activity** column) on the **Recurring Activity** tab.

The activity text is highlighted in red.

2. Click **Save** to confirm your changes.

3.10 Settings

In the **Settings** tab, you can enter email addresses and change other settings for the user accordingly. See the following sections for a description of the parameters you can set on this tab.

The screenshot displays the Mitel CMG Directory Manager interface. The left sidebar contains navigation options: Select directory, Quick search, Records, Organization, Keywords, Name alternatives, Quick Info Manager, Templates, Printouts, Change Settings, Languages, Help, and Log out. The main content area is titled 'Cruise Tom (1009)' and shows the 'Settings' tab. The settings are organized into sections: Message systems (E-Mail, None, None, None), Secret (checkboxes), Address (text input), CMG Web (checkboxes), CMG Speech Office (checkboxes), Message waiting (checkboxes), Workgroup administrator (checkboxes), Name directory (checkboxes), Organization directory (checkboxes), Enable name search (checkboxes), Enable CMG Web search (checkboxes), Delete password in CMG Web (checkboxes), and Calendar synchronization (checkboxes).

3.10.1 Messaging Systems

Specifies how the attendant and office user can send messages. Each user can have four different message channels. The messaging systems are available to you depends on which systems you have connected to your CMG system.

It can make future work easier if you always specifying the various messaging systems in the same order for all users (e.g., email first, SMS second).

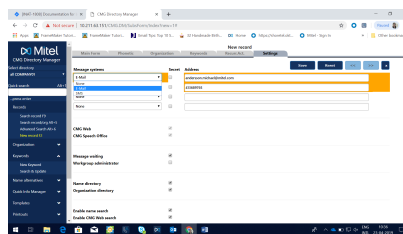
3.10.1.1 E-mail

Select the messaging system for E-mail in the list.

Type the e-mail address in the address field. For certain e-mail systems you must enter an internal e-mail address, not an external address. Ask your IT department if you are in any doubt.

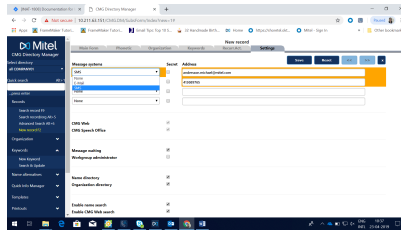
Note:

If entering more than one e-mail address, make sure that the address in the first field is the one used to synchronize the presence information in CMG Web towards the presence server.



3.10.1.2 SMS

1. Select the messaging system for SMS in the list.
2. Type the mobile phone number in the address field.
3. To mark the mobile phone number as secret, select Secret.



3.10.2 Message waiting

If the user does not have an e-mail address, the CMG system can instead enable the phone's Message waiting function. This means that when the attendant enters a message, a lamp lights up on the phone. (The message indicator can vary, depending on the switchboard and type of phone.) If the user has an e-mail address, this check box has no function.

3.10.3 Workgroup administrator

If this box is checked, it means that the user can register activities for everyone in the same workgroup from CMG Web.

3.10.4 Name directory

This check box is used if you want to be able to make a simple selection when you print name lists or create name directories in CMG Phone book. If you make sure that only people have this box checked, you can easily produce a list and exclude faxes, conference rooms, vacant phones, etc.

3.10.5 Organization directory

This check box is used if you want to be able to make a simple selection when you print organization lists or create organization directories in CMG Phone book. If you make sure that only the forms that are to be included in the organization directory have this box checked, you can easily produce a list and exclude vacant phones, modems, etc. that you do not want to include in your list.

3.10.6 Enable name search

If this box is not checked it means that the user's name is not searchable for the attendant and office user. This parameter minimizes unnecessary hits in the search results.

Example: You have registered 150 extensions that are not operational with the name "Free", so that the attendant receives a flash if someone calls such a number. If you select this option, the attendants will not call them up every time they search for "Free",

perhaps when searching for someone called “Freeman”. Note that all fields are always searchable in CMG DM.

3.10.7 Enable search in CMG Web

If this box is not checked, it means that the user cannot be searched by office users in CMG Web. Note that all users are always searchable in CMG DM.

3.10.8 Delete password in CMG Web

Click the “X” and save if the user has forgotten his or her password. The old password is deleted, and the user can log in without a password and create a new one.

3.10.9 Calendar synchronization

If the **Enabled** box is checked, it means that the user has an activated calendar link with the activity system. This means that when the user books a meeting in his or her calendar, the activity is automatically synchronized with the CMG system.

If the **Blocked** box is checked, it means that synchronization with the calendar will not take place.

3.11 CMG Speech

In the **CMG Speech** tab, you can enable and configure CMG Speech functionality for the user, including Interactive Voice Response (IVR), Voicemail, and TTS usage.

Select which user group the user belongs to and press **Save** to enable the CMG Speech functionality for the user.

4001 4001 (4001)

Main Form Phonetic Organization Keywords Recurr.Act. Settings **CMG Speech**

Save Reset << >> X

User group: SYS
 Operator group: Operators
 Language: English (UK)*
 Information level: Standard*
 Voicemail account: ☒ CMG VoiceMail*
 System voice: ☒
 TTS: ☒
 ASR: ☒
 Voice Mail Lock: ☐

Read out name	Pronounced name	Use file
<input checked="" type="checkbox"/>		<input type="checkbox"/> Create sound file
<input checked="" type="checkbox"/>		<input type="checkbox"/> Create sound file
<input checked="" type="checkbox"/>		<input type="checkbox"/> Create sound file

New pincode (Only digits): Generate new pincode

The following table describes the parameters available in this tab.

Parameter	Description
User Group	<p>The group to which the user should belong. User groups are created and edited in CMG Speech Configuration Manager.</p> <p>The remaining settings are retrieved automatically from the user group's basic settings. These only need to be changed if the user needs any special settings.</p>
Operator Group	<p>The attendant group the user's calls are to be connected to when the person calling presses 9 for attendant. This can only be changed if there are attendants at several sites.</p>
Language	<p>The language to be used when the user interacts with CMG Speech, for example listens to retrieved messages.</p> <p>This setting can be changed by the user.</p>
Information Level	<p>Defines how much the automatic voice should say when the user calls the system. This setting can be changed by the user, if the user group configuration allows it.</p>
Voicemail Account	<p>Activates activate the voice mailbox. This setting can be changed by the user, if the user group configuration allows it.</p>
System Voice	<p>Activates use of the system voice for presenting activities. If not selected, the IVR acts as an automatic answering machine, meaning the user must record greeting messages.</p> <p>This setting can be changed by the user, if the user group configuration allows it.</p>

Parameter	Description
TTS	<p>Enables the user's name to be read text-to-speech when called. This setting can be changed by the user, if the user group configuration allows it.</p> <p>If not enabled, other user group configurations decide how the system behaves on incoming calls (usually the extension number is read out instead of the called person's name).</p> <p>All installed TTS languages are listed with flags, and each of them can be configured separately.</p> <p>For TTS, it is possible to define in which languages the users name should be possible to read out, to customize the pronunciation of the name, and in the latter case, to generate the sound file for the customized pronunciation. See the CMG DM online help for more information.</p>
New Pincode	<p>New pincode for the user.</p> <p>If you want to create a separate pin code for the user, enter the pin code in this field.</p> <p>If you want the system to generate a new pin code for the user, click the Generate new PIN button to the right of this field..</p>
Send the new pincode to	<p>The email address (selected from a drop-down menu) where the new pincode should be sent.</p> <p>Select the check box to have the new PIN sent to it.</p>
Number of new voicemails	<p>The number of new voicemails (that is, voicemail not yet listened to) for the user.</p> <p>Only applicable if CMG VoiceMail is installed.</p>
Selected languages	<p>Languages used for voice response when presenting the user's current activity.</p>

Parameter	Description
VoiceMail Lock	By default, the VoiceMail Lock check box is cleared. The check box becomes selected when the user's voicemail gets locked after 5 failed attempts of entering the pin code. The administrator can unlock the user's voicemail by clearing the check box and clicking the Save button.

3.12 Group Changes

Group changes are used when you want to change the same information for several user records simultaneously.

To select all records in a hit list, you can click the **Select all** button or select them by holding down the Shift key and using the arrow keys.

To select only some of the users in the list, hold down the Control key (Ctrl) and click the rows that you want to select. If you click on a name in the first column (text in blue) you open the user's main form.

Note:

The Delete selected button deletes the user records that are selected.

To make a group change, do the following:

1. Locate and select the user records that you want to change. See section 2 for more information about searching.

2. Click the **Change selected** button.

Record list

tot: 4 (4)

Select All

Delete selected

Change selected

<<

>>

Last Name	First Name	Phone	Organization	Title
Affleck	Rosie	1008	Mitel1	
Affleck	Rosie	1008		
Affleck	Rosie	1080		Marketing assistant
Affleck	Rosie	1080		Marketing Assistant

The Group Changing dialog box opens.

Group Changing

Save

Cancel

1. Select target

☒ Selected < 1 Records >
 ☐ All in selected directory < all COMPANY01 >

2. Select field

Select in the list...

3. Select method

☐ New value
 ☐ Copy from field
 ☐ Move from field

4. Enter a new value

3. Specify the target group for the change in the **Select Target** section by selecting one of the following options:

- **Selected:** the records you selected from the record list (number of records is shown).
- **All in selected directory:** all records in the database.

4. Specify the record field that you want to change by selecting an option from the **Selectfield** drop-down menu.

If you are copying or moving a field, this is the destination field. When you select certain fields, a new window opens when you make your selection (e.g., Organization tree).

5. Specify the method you want to use to make the change by selecting one of the following options:

- **New value:** use if you want to make a change in a field.
- **Copy from field:** use if you want to copy the content from one field to another field.
- **Move from field:** use if you want to move information from one field to another field

6. Specify the change you want to make in the **Enter a new value** area.
 - a. If you selected the **New value** method, an empty field or a multi-choice menu appears (depending on the field selected under **Select field**).
 - b. If you selected the **Copy from field** method, a multi-choice menu appears from which you can select the field you want to copy information from.
 - c. If you selected the **Move from field** method, a multi-choice menu appears from which you can select the field you want to information move from.
7. Click **Save** to confirm the change (click **Cancel** to undo the change).

3.13 Change Form

You can use the change form to register changes to be made for the user in the future (e.g., for an upcoming change in job or organization).

3.13.1 Creating a New Change Form

To set up a change for a user, do the following:

1. On the **Main form** tab, click the **New change form** button.

2. In the Start date dialog box, select a date for the change to take effect (current date is highlighted in yellow) and click **OK**.

The image shows a date selection dialog box for May 2019. The calendar grid displays days from Sunday to Saturday. The date '2' is highlighted in yellow, indicating it is the selected date for the change to take effect.

The system creates a change form as a copy of the original record, but with only five tabs (the **Recurring activity** and **CMG Speech** tabs are not included in the change form).

The screenshot shows the 'Change form - 06/05/2019' for Alex Anderson. The form is divided into several sections with tabs for 'Main Form', 'Phonetic', 'Organization', 'Keywords', and 'Settings'. The 'Main Form' tab is active, showing fields for 'Last name', 'First name', 'Phone', 'Mobile', 'Cust.grp', 'Alt.ext.1', 'Alt.ext.2', 'Room', 'Field1', 'Field2', 'Field3', 'Field4', 'Field5', 'Field6', 'Field7', 'Field8', 'Field9', 'Field12', and 'Field13'. The 'Act Date' is set to 05/06/2019, and the 'Deact Date' is set to 'Until further notice'.

3. Enter the changes to apply to the user.

Note:

You can click the Show active form button to return to the original form.

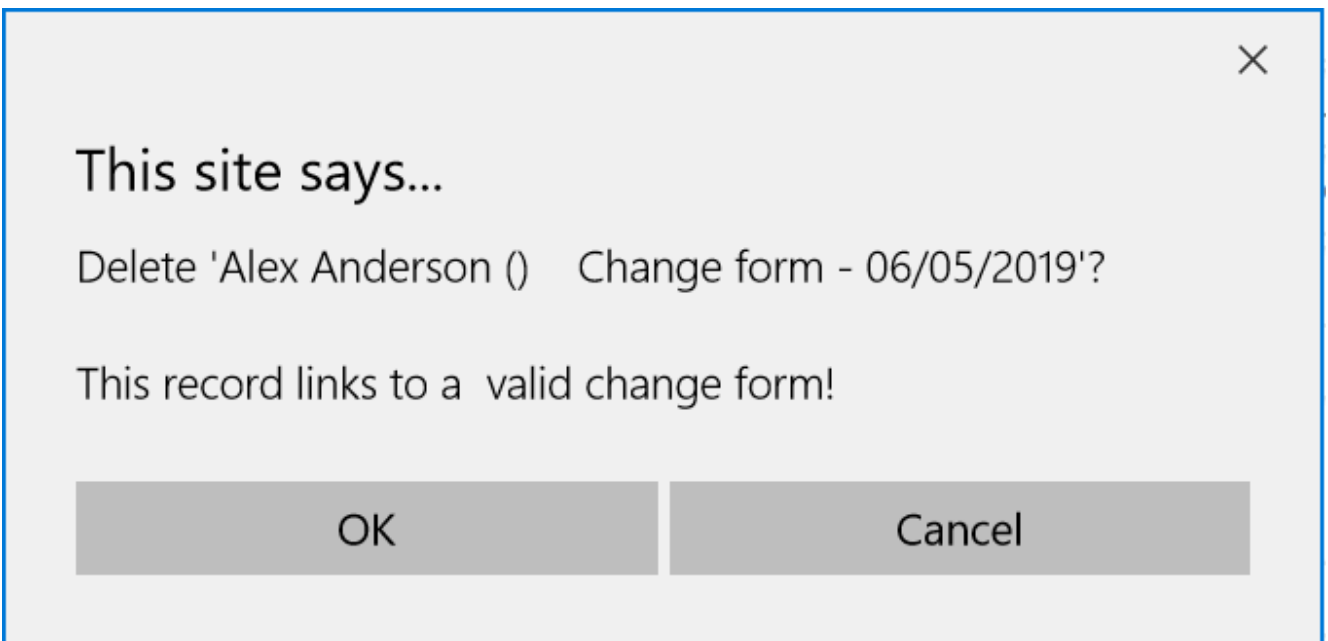
4. Click **Save** to save the change form.

When the change form is activated the original form disappears.

3.13.2 Deleting a Change Form

To delete a change form, do the following:

1. Click the **Change form** button on the Main form tab.
2. In the Change form, click the **Delete** button.
3. Click **Ok** in the Confirmation dialog to confirm that you want to delete the form.



Note:

If you have the original form open and click Delete, both the original form and the change form are deleted.

3.13.3 Copying a User Record

To copy an existing user record, do the following:

1. In the **Main form** tab, click the **Copy** button.

Select if you want to copy the phonetics.

A new form is created. Note the text “Copy of:” in the last name field.

The screenshot shows a user record form in the Directory Manager. The form is titled "Copy of : Andersson Michael (0098)". The "Main Form" tab is selected. The form contains various fields for user information, including "Last name", "First name", "Phone", "Mobile", "PBX ID", "Organization", "Keywords", "Title", "Workgroup", "Room", and "Field1" through "Field17". The "Last name" field is highlighted with an orange border and contains the text "Copy Of : Andersson". The "First name" field contains "Michael". The "Room" field is highlighted with an orange border and contains "2 floor". The "Field1" field is also highlighted with an orange border and contains "Toronto". The "Title" field contains "Marketing Assistant". The "Room" field is highlighted with an orange border. The "Field1" field is also highlighted with an orange border.

Do not forget to change the text in the last name field.

Note:

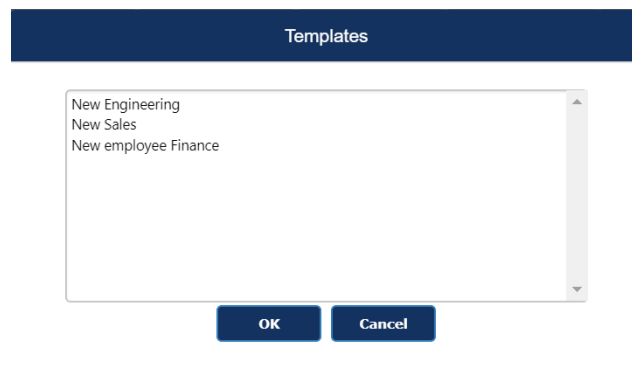
In the Directory Manager, while copying an existing user record using the copy button, the values from the “Settings” tab are not copied from the existing user to the copied user.

3.14 Templates for New User Record

To create a new user record using a template, do the following:

1. Click the **New record** link in the left sidebar.
2. Click **Template**.

A list of your templates appears.



3. Select the template you want to use for the new record and click **OK**.

For information on creating templates, see section 6.

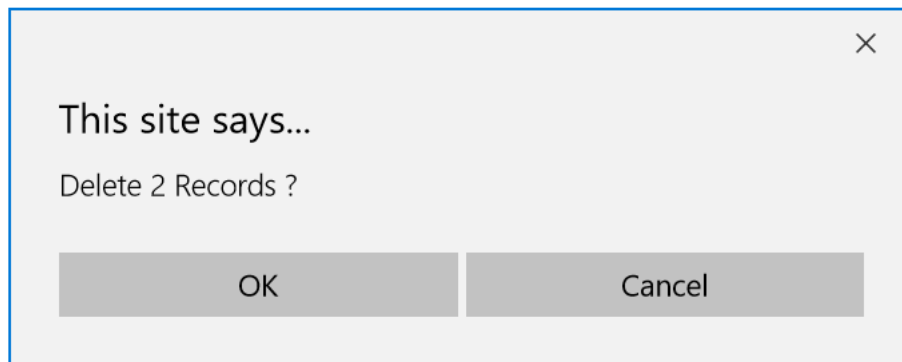
3.15 Deleting a User Record

To delete a user record, do the following:

1. Locate and select the user record(s) that you want to delete.

2. Click the **Delete** button.

Record list					tot: 5 (5)	
Select All		Delete selected		Change selected		
Last Name	First Name	Phone	Organization	Title		
Affleck	Rosie	1008	Mitel1			
Affleck	Rosie	1008		Marketing assistant		
Affleck	Rosie	1080	Marketing	Marketing Assistant		
Affleck	Rosie	7897				



3. Click **Ok** to confirm the deletion.

You cannot undo this action.

You can also delete a user record by clicking the **Delete** button when you are in the **Main Form** tab.

Affleck Rosie (1008)

Main Form Phonetic Organization Keywords Recurr.Act. Settings

Copy Delete New change form Save Reset << >> x

Sign niceadmin Changed date 20190422 15:04:36 Act Date 22/04/2019 Deact Date ☒ Until further notice ☐ 23/04/2019

Last name Affleck Phone 1008 ☐ Secret

Main record ☒ 3(3) PBX ID PBX1 Alt.ext.2

Organization Mitel1 Information

Keywords Title Room

Workgroup Management Field1

Field2 Field3

Field4 Field5

Field6 Field7

Field8 Field9

Field12 Field13

This site says...

Delete 'Affleck Rosie (1008)'?

This record links to a valid change form!

OK Cancel

Note:

If you delete a user record - IVR, Voicemail, Greetings, Menus, and all the personal data of the user will be deleted.

Managing Organizations

4

This chapter contains the following sections:

- [Introduction](#)

This section helps you to get started with organization management.

4.1 Introduction

When you have made changes in the organization, the attendants must log out and log into the attendant software to see the changes.

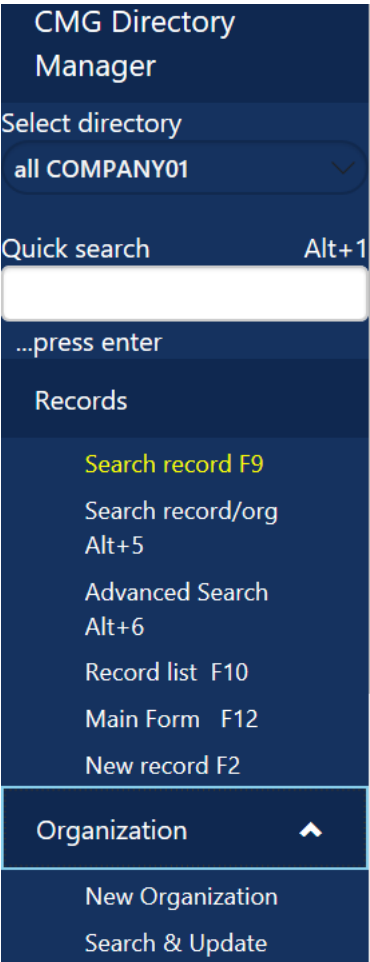
You access the organization tree by clicking **New Organization** under the Organization heading in the left side bar to start building the organization tree.

If you already have an organization tree, the name of the highest unit in the tree appears in the Manager Organization page when you click on Search and Update from Organization Side Bar.

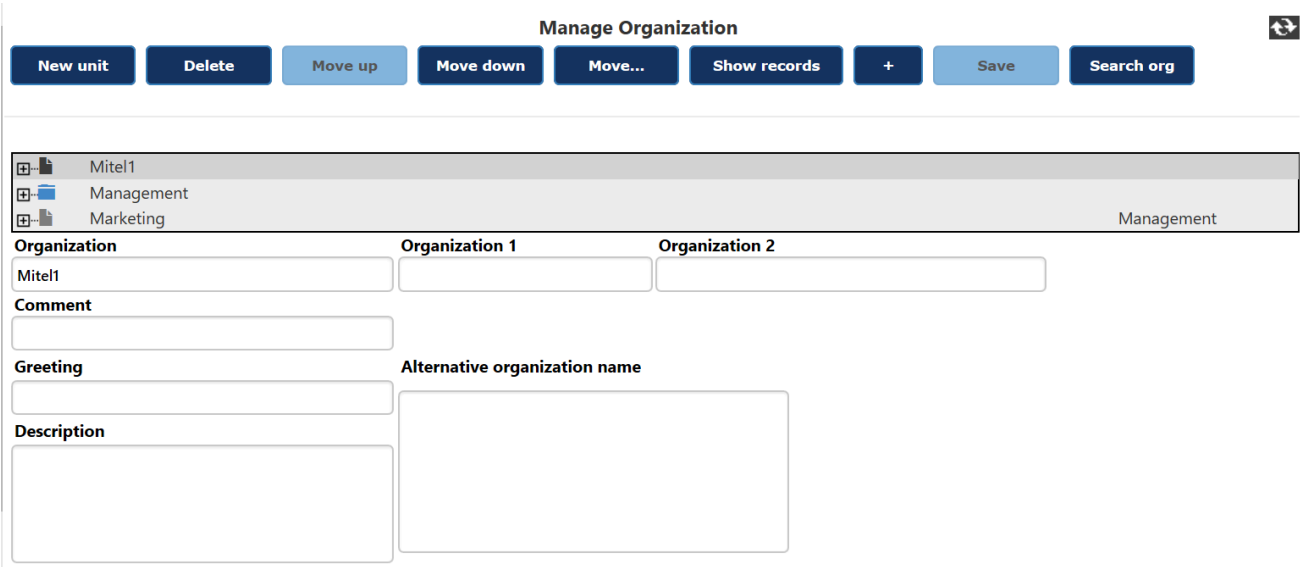
Note:

For Legacy CMG DM, If you already have an organization tree, the name of the highest unit in the tree appears under the organization section in the side bar (Eg., company name).

Click the company name to move into Organization management.



The **Manage Organization** window appears.



You can navigate in the organization tree by clicking the folders. A unit is shown either as a document or a yellow folder, depending on whether it has any sub-units. When you

“open” by clicking the plus sign or selecting and pressing the right arrow on the keyboard, a unit or its sub-units will appear.

The following table summarizes the toolbar buttons available in the **Manage Organization** window:

Parameter	Description
New Unit (Alt + N)	Adds a new unit to the unit selected in Organization.
Delete (Alt + T)	Deletes the selected unit and any sub-units
Move up	Moves a unit upwards on the same level in the organization
Move down	Moves a unit downwards on the same level in the organization
Move	Moves a unit to another unit, not on the same level.
Show records (Alt + V)	Shows the users that are linked to the selected unit.
+	Expands the organization and shows all of the selected unit's sub-units
Save (Ctl +S)	Save the organization tree.
Search Org	Locates a unit in the tree.

Note:

If the Organization tree is built with several root levels, then the show order in InAttend and NOW will not match the right-side org tree structure of CMG DM.

4.1.1 Creating a New Organization

To create a new organization, do the following:

1. Click New organization in the side bar. A dialog box appears

New unit

Organization	Org 1	Org 2
<input type="text"/>	<input type="text"/>	<input type="text"/>
Comment <input type="text"/>		
Greeting <input type="text"/>		
Description <input type="text"/>		
Alternative organization name <input type="text"/>		

OK
Cancel

2. Complete the fields in the dialog box. It is sufficient to enter the name of the organization, but completing the Org 1 field to provide additional information for an attendant search can be helpful.

- **Organization:** Exact name of the unit.

The field is searchable for the attendant; can be renamed.

- **Org 1:** Used to explain the Organization name. The field can contain accepted departmental abbreviations or information about which unit the unit in question belongs to. The field is searchable for the attendant; can be renamed.
- **Org 2:** Used to further explain the Organization name. The field can contain accepted departmental abbreviations or information about which unit the unit in question belongs to. Can be renamed.
- **Comment:** Used for comments about the organization (previously named Alternative Organization name).
- **Greeting:** If there is a greeting, it appears for the attendant when a call is answered for a user connected to the unit or sub-unit.
- **Description:** Used mainly as a sub-heading in CMG Phonebook when building an organization directory. The field is also visible to the attendant.
- **Alternative Organization name:** Used by CMG Speech Attendant. If the database contains several people with the same name, Speech Attendant reads the Organization name. If you want another name to be read, enter it here.

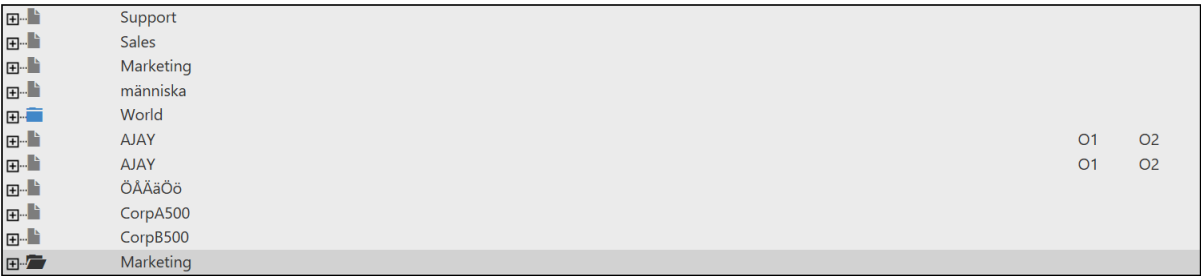
This field is also used to include phonetically similar variants of the organization name, which are found when searching for organizations.

3. Click **OK**.

The new organization appears in the tree.

4. Click **Save** to save the changes.

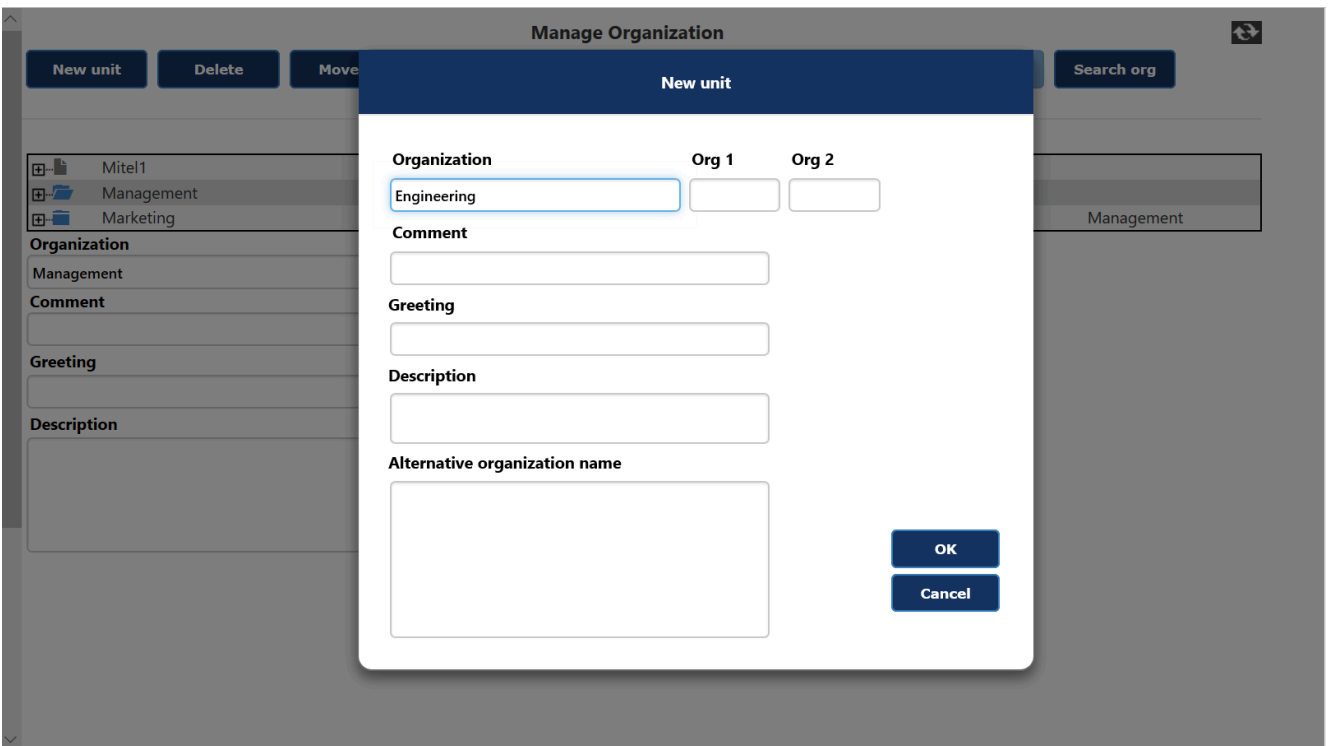
Once you have saved, the organization’s name appears under the organization heading in the side bar.



4.1.2 Creating a New Unit

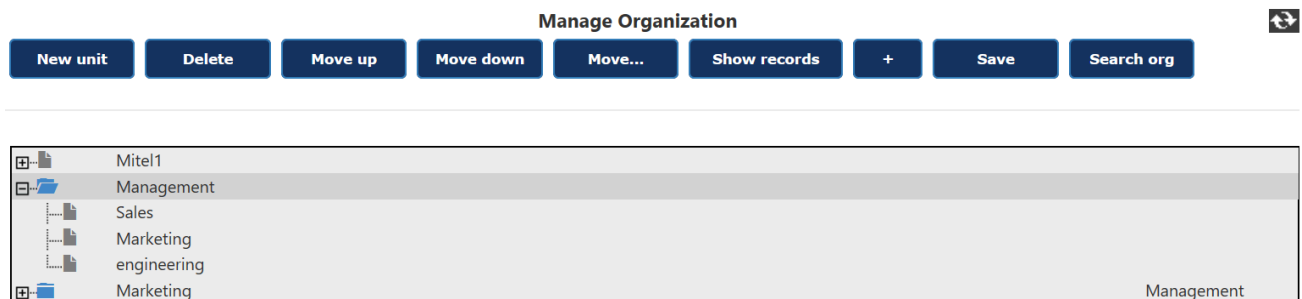
To create a new organizational unit, do the following:

1. Select the unit for which you want to create a sub-unit. Note that a unit is selected when it is highlighted in blue, not when it is underlined.
2. Click **New Unit** (Alt+N).



3. Complete the fields in the dialog box (see section 4.1.1 for a description of the fields).
4. Click **OK**.
5. Click **Save**.

A new sub-unit has been created.



4.1.3 Editing the Name of a Unit

To edit the name of a unit, do the following:

1. Locate and select the unit that you want to change.
2. Enter the changes in the field at the bottom of the screen.

The screenshot shows the 'Manage Organization' interface. At the top, there is a title bar 'Manage Organization' and a toolbar with buttons: 'New unit', 'Delete', 'Move up', 'Move down', 'Move...', 'Show records', '+', 'Save', and 'Search org'. Below the toolbar is a tree view showing the organizational structure. The tree has a root node 'Mitel1' with children 'Management', 'Sales', 'Marketing', 'engineering', and 'Marketing'. The 'Marketing' node under 'Sales' is selected. Below the tree view is a form for editing the selected unit. The form has two columns: 'Organization 1' and 'Organization 2'. The 'Organization' field is set to 'Software'. The 'Comment' field is empty. The 'Greeting' field is empty. The 'Description' field is empty. The 'Alternative organization name' field is empty.

3. Click **Save**.

The changes are valid for all users that are linked to the current organizational unit.

4.1.4 Moving a Unit in the Tree within the Same level

To move a unit in the organization tree, do the following:

1. Select the organizational branch to be moved.
2. Click the **Move Up** button or the **Move Down** button to move the unit as desired.. The organizational unit and any sub-units are moved.
3. Click **Save**.

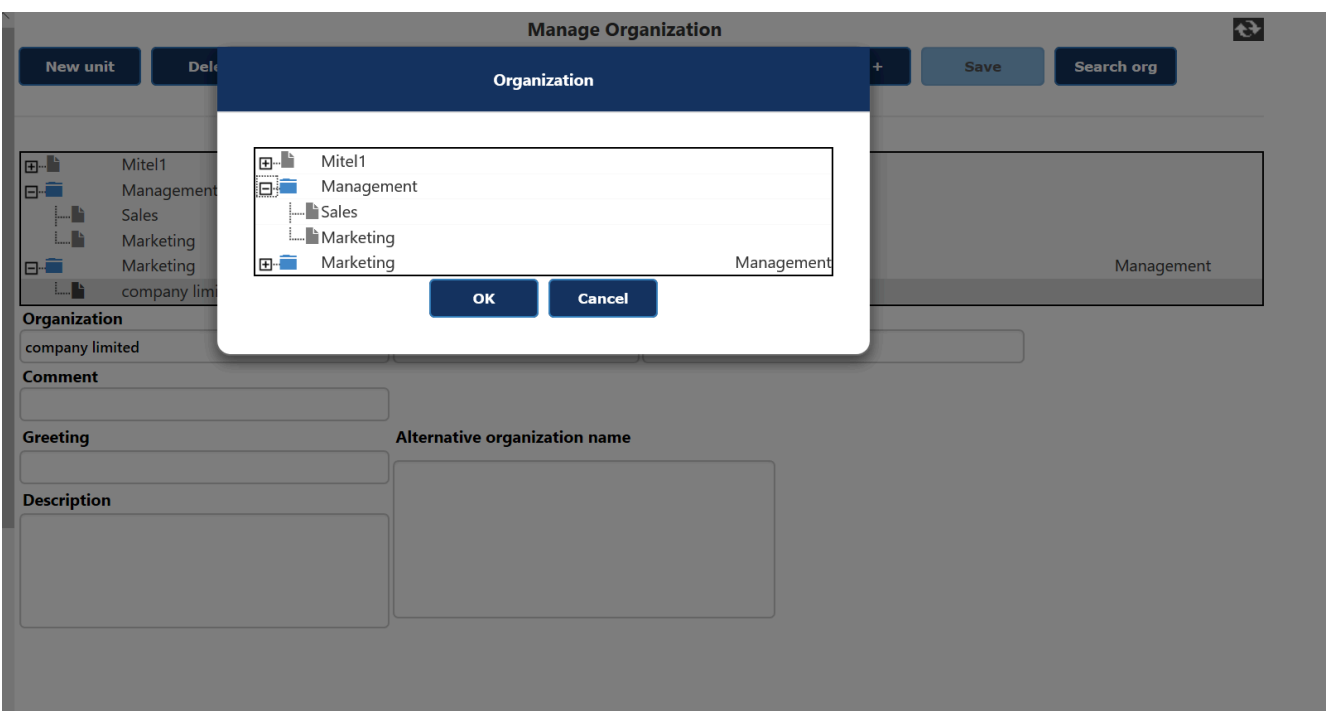
4.1.5 Moving a Unit to Another Level in the Tree

Note:

Make sure that you save the organization tree before you move the unit. Otherwise the tree will have the wrong appearance when you come to step 3 below.

To move a unit to another level in the organization tree, do the following:

1. Select the organizational branch to be moved.
2. Click the **Move...** button. The organization tree appears in a new window:



3. Select the unit that you want to move.
4. Click **OK**. The unit is moved.
5. Click **Save** to save your changes.

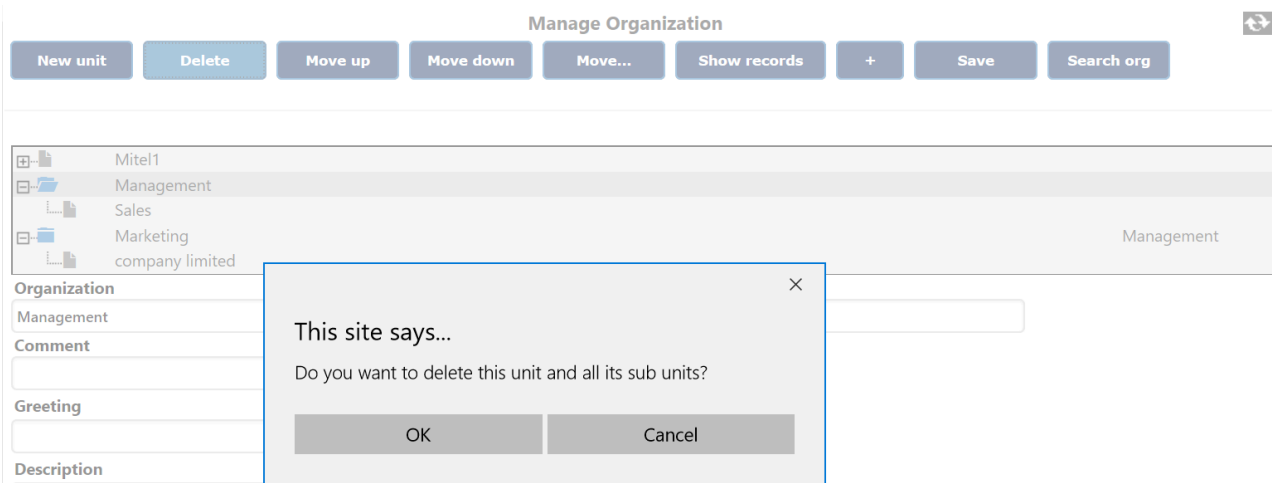
4.1.6 Deleting a Unit from the Tree

If the unit that you are deleting has sub-units, these will also be deleted. If you do not want to delete the sub-units, you must first move them to another unit and save them before you delete.

To delete a unit from the organization tree, do the following:

1. Select the unit that you want to delete.
2. Click the **Delete** button (or Alt+T).

If the unit has any sub-units a confirmation dialog box appears.



3. Click **OK**.
4. Click **Save** to save the changes.

4.1.7 Undoing Changes

If you want to undo your changes (e.g., if you have deleted an organization by mistake), you can undo your changes.

You can only restore your changes if you have not saved them.

To undo your changes, do the following:

1. Click the Update  icon.

A dialog box appears.



2. Click **Stay**.

4.1.8 Searching an Organization

If you have a large organization, it can be easier to search for the unit in the organization tree than to navigate your way to it.

To search an organization, do the following:

1. In the Manage Organization window, click the **Search Org** button.

A search window appears:

2. Enter all or part of the unit name.
3. Specify the field (e.g., Organization, Org1 or Org 2) you want to search in under the **Select Filter** drop-down menu. You can also search empty fields.
4. Click **Search**.

The system displays a list of results.

tot:1
Organization Org 1 Org 2 Sales

5. Click the unit you want to open.

The tree expands to show the unit that you have selected

Manage Organization

New unit

Delete

Move up

Move down

Move...

Show records

+

Save

Search org

Mitel1

Management

Sales

Marketing

Marketing

Management

This chapter contains the following sections:

- [About Keywords](#)
- [Searching for Keywords](#)
- [Viewing User Records Linked to Keywords](#)
- [Changing a Keyword](#)
- [Deleting a Keyword](#)
- [Undoing Keyword changes](#)

This section provides information on editing, changing, adding and deleting keywords.

5.1 About Keywords

Each keyword in the CMG system is unique. This means that the same word spelled the same way can only occur once. All users with the same keyword on their form share the same word from the keyword database.

In keyword administration, it is easy for you to find the keywords you want to change. There might, for example, be misspellings or incorrect alternatives. Rather than making changes to each user form, you can edit the keywords directly in the keyword database.

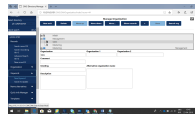
The keywords are stored in a separate database. Each keyword is usually linked to one or more users. This means that if you change a keyword in keyword administration the keyword is changed for all users that have the word on their form. If you delete a keyword from the keyword index, it disappears from all user records that have that keyword.

If you want to add or delete a keyword to or from one user record only, you must bring up the record and go into the keywords tab. For more information about adding and deleting keywords in user records, see section 3.8.

5.1.1 Adding a New Keyword

To add a new keyword to the keyword database, do the following:

1. Click the **New Keyword** link under **Keywords** in the side bar.

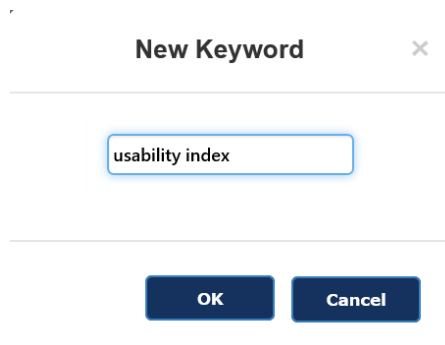


If you are already on the Manage Keywords page, click the New keyword button.

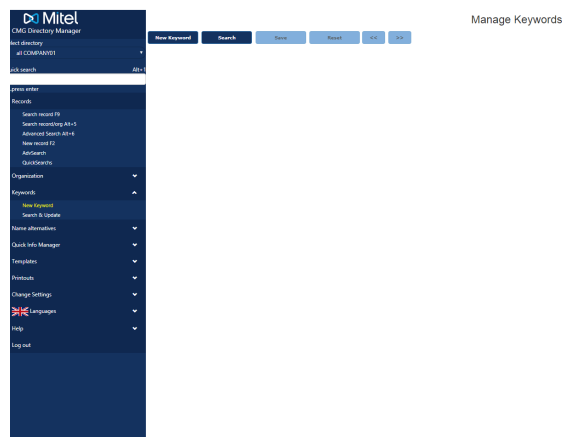
Manage Keywords



2. A **New Keyword** dialog box opens. Enter the keyword and click **OK**.



3. Click **Save** to save your changes.



When a keyword is registered in this way it is placed in the keyword database without a link to any user. You can now locate and add the keyword to a user. For information about adding a keyword to a user record, see section 3.8.

If the keyword already exists in the database, a message appears.

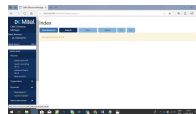
The keyword database does not differentiate between upper- and lower-case letters. If, for example, you enter “Invoicing” and “invoicing”, the words are saved as the word that

you entered first, “Invoicing”. You can subsequently change from upper case to lower case, or vice versa.

5.2 Searching for Keywords

To locate existing keywords, do the following:

1. Click the **Search and update** link under **Keywords** in the side bar.



If you are already on the **Manage Keywords** page, click the **Search** button.

Manage Keywords



2. A Search dialog box opens.

Enter all or part of the keyword that you want to edit

Search

×

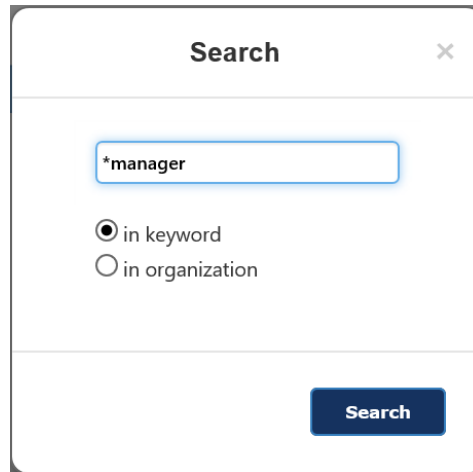
☒ in keyword
☐ in organization

Search

Tip: Use an * (asterisk) before the word you are looking for “everything that contains...” (e.g., “*manager” brings up all existing keywords containing the word manager).

3. Specify how you want to search:

- in keyword: search is performed on keywords
- in organization: search is performed on organization



4. Click **Search**.

The system returns a list of results.



If your search returns a large number of results, the keywords are divided into a number of pages with 30 keywords per page (Settings in System). Use the arrows in the top right-hand corner to browse between the pages.

Searching Keywords by Organization

When you select the **in organization** option when performing a keyword search, the search is performed in the organization tree. This means that you produce a list of all keywords that are linked to people in a given organizational unit (e.g., “Which keywords do those working in the finance department have?”).

×

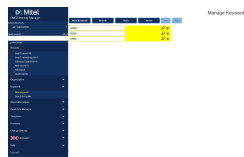
Search

Marketing

☐ in keyword
☒ in organization

Search

The system returns a list of results.



For more information about managing organizations, see section 4.

5.3 Viewing User Records Linked to Keywords

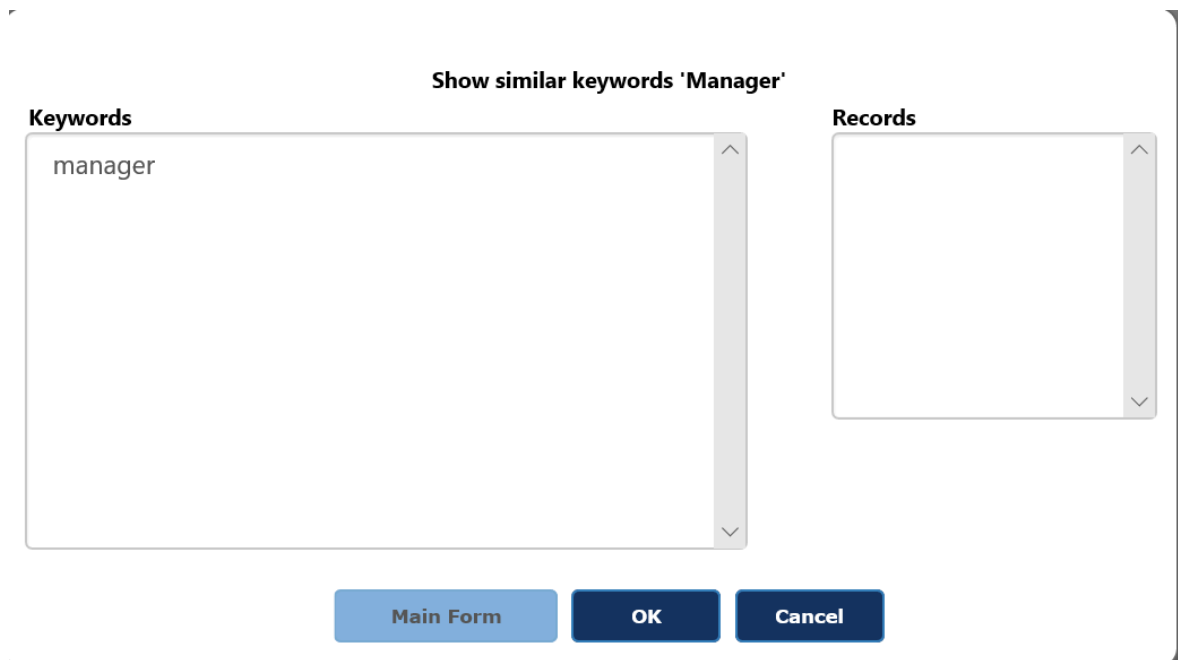
You can use this function to see which user records are linked to a given keyword.

1. Locate the keywords that you want to check.
2. Select the keyword that you want to check.



3. Click the Magnifying glass  or press Enter.

A dialog box opens.



The dialog box titled "Show similar keywords 'Manager'" features two side-by-side scrollable lists. The left list, labeled "Keywords", contains the word "manager". The right list, labeled "Records", is currently empty. Below these lists are three buttons: "Main Form", "OK", and "Cancel".

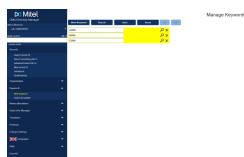
The selected keyword appears in the left-hand column. If there are several keywords in the column, it indicates that the system has found all keywords that begin with whatever you selected. For example, if you decide to check the keyword manager, the system displays “manager” and all other keywords that begin with “manager”.

The column on the right contains names and extensions of the user records that have the keyword in question. If no names are shown, this means that no user record is linked to this keyword.

5.4 Changing a Keyword

If you change a keyword in keyword management, the change impacts all user records that have the keyword linked to their form.

1. Locate and select the keyword.



2. Enter the new keyword.

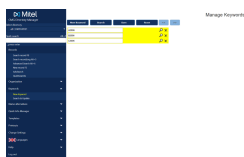
The keyword is highlighted in orange to indicate that you have made a change:



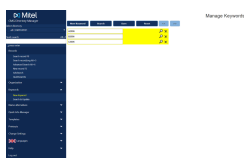
3. Click **Save**.

Tip: You can change several keywords in the list before saving.

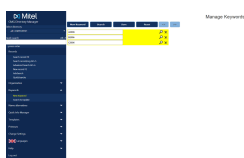
If you find a number of different spelling options for a keyword, you can change all versions to the same one.



Change the incorrect versions.



When you save, the various versions are merged to produce one keyword. Any users who had an incorrect version of the keyword linked to their forms will have the correct one.



You must locate the keywords again to view the changes.

5.5 Deleting a Keyword

If you delete a keyword from the keyword database, it will be deleted from all user records that have that word. If you want to delete a keyword from a single user record,

you must do this from the user form. For information on deleting a keyword from a user record, see section 3.8.4.

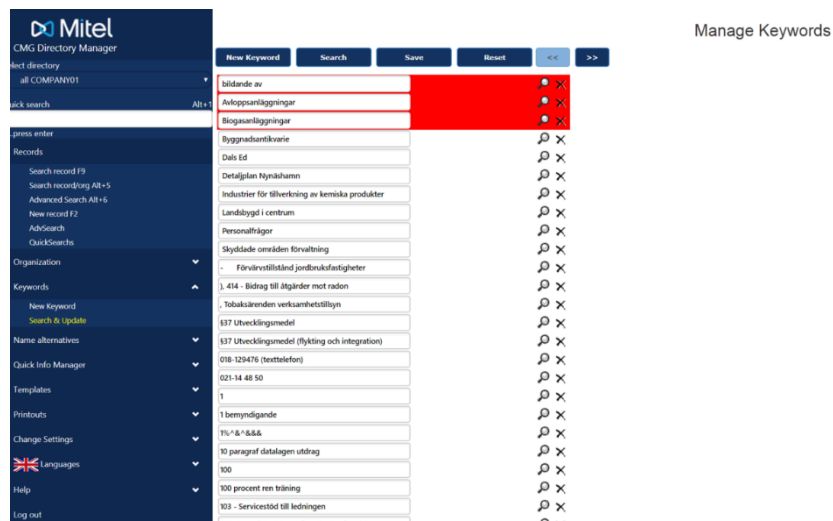
To delete a keyword from the keyword database, do the following:

1. Locate and select the keyword that you want to delete.



2. Click the “X” to the right of the keyword field.

The keyword is highlighted in red



3. Click **Save** to confirm your changes.

You can delete several keywords in the list before applying your changes by clicking **Save**.

Note:

You cannot restore once you have saved your changes.

5.6 Undoing Keyword changes

You can undo all changes and deletions before you save them by clicking on the **Restore** button.

The keywords that are highlighted in yellow, orange or red are restored.

Managing Templates

This chapter contains the following sections:

- [Creating a New Template](#)
- [Using a Template](#)
- [Editing a Template](#)
- [Deleting a Template](#)

This section provides information about template management.

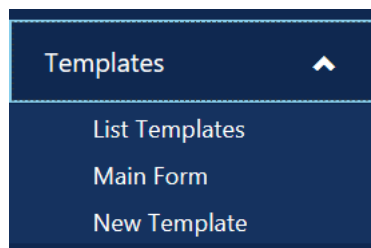
You can use the Templates function in the side bar to create templates so that you can register new records in a uniform way. For example, you can create a template for all new employees in the Finance Department in which organizational allegiance, keywords and perhaps certain contact details are the same. You can also use templates to assist you in completing the various fields in record management, a so-called prompting template.

6.1 Creating a New Template

It is a good idea to have a template for new employees, for example. The procedure below uses an example of a template for a new employee – Finance.

To create a new template, do the following:

1. Click the **New Template** link under Templates in the left sidebar.



2. Rename the new template (for example, enter "New employee" in the **Last name** field and "Finance" in the **First name** field).
3. Enter the information that is to be valid for all new employees in Finance, such as Visiting address, Manager, Organization, Keywords.
4. Click **Save**.

New Template

Templates

Main Form

Organization

Keywords

Recurr.Act.

Settings

Copy

Delete

Save

Reset

<<

>>

x

Signature

Changed date

Act Date

Deact Date

Until further notice

Last name

New Employee

First name

Finance

Phone

Secret

Mobilephone

Secret

Main record

List

Cust.grp

CUSTGRP1

PBX ID

PBX1

Alt. extension 1

Alt. extension 2

Organization

Org 1

Org 2

Information

Keywords

Title

Room

Workgroup

Field1

Field2

Field3

Field4

Field5

Field6

Field7

Field8

Field9

6.2 Using a Template

You can use a template when creating a new user record, which can save time and prevent potential errors in data entry.

To use a template when creating a new record, do the following:

- 1. Click the **New record** link under **Records** in the sidebar.
- 2. Click the **Template** button in the **Main Form** tab of the new record.

Main Form

Phonetic

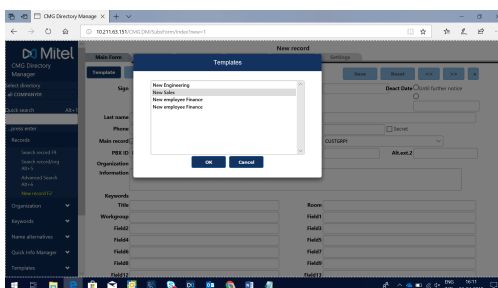
Organization

Template

Copy

Delete

3. Select the template that you want to use from the list and click **OK**.



The information in the template is entered in the main form for the new record. You can then add the personal details pertaining to the user.

Note:

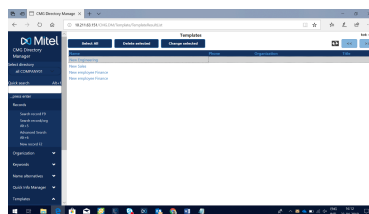
You cannot use a template when you are in Template management. If you try to enter a user, you will change the template instead of the user.

6.3 Editing a Template

You can edit an existing template once it has been created.

To edit an existing template, do the following:

1. Click the **List templates** link under **Templates** in the sidebar.
2. Select the template you want to edit by clicking on the template link in the Templates window.



The system opens the template so that you can change information as necessary.

3. Click **Save** to confirm your changes.

6.4 Deleting a Template

You can delete an existing template once it has been created.

To delete an existing template, do the following:

1. Click the **List templates** link under **Templates** in the sidebar.
2. Select the template you want to delete so that it is highlighted in blue.
3. Click the **Delete selected** button to delete the template.

Managing Printouts

This chapter contains the following sections:

- [Printing an Existing List](#)
- [Creating Custom Printout Templates](#)
- [Creating a New Custom Printout](#)
- [Editing Printouts](#)
- [Merging Fields in a Printout](#)
- [Resorting the Order on the Printout](#)
- [Deleting a Printout](#)

This section provides information on print management.

You can create printouts from the database from the **Printouts** option in the side bar. The printout can only be generated directly from CMG DM or saved in another file format for processing in Word or Excel, for example.

You can print various items of information from CMG DM, and the system provides several predefined print layouts, ready to use.



- **Organization:** list of the organization tree's structure.
- **Name list:** searchable fields are: name, phone number organization and title.
- **Org list:** list of users in organization tree order.
- **Form list:** list of all user information from the main form; one printout page per user record.
- **Activity list:** list of users that have registered activities.

7.1 Printing an Existing List

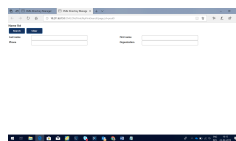
To print an existing list, do the following:

1. Click the print layout you want to generate under Printouts in the sidebar (for example, Name list).

The system displays a search form for the list you want to generate.

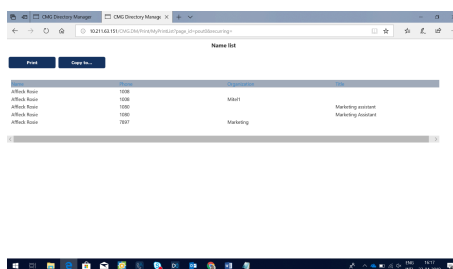
2. Enter the search criteria you want used to generate the name list.

For example, if you want a name list of people with phone numbers that begin with “3”, enter the number “3” in the Phone field.



3. Click **Search**.

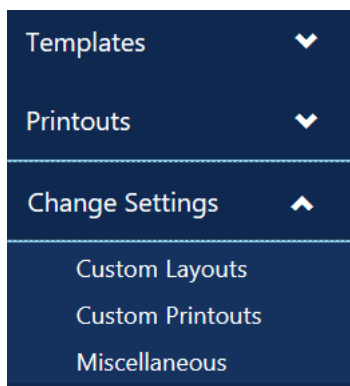
The system returns a list of results. For a Name list, the results include name, phone number, organization and title information for each user (these headings are searchable).



7.2 Creating Custom Printout Templates

To create a custom printout template, do the following:

1. Click the **Custom Printouts** link under **Change Settings** in the sidebar.



2. In the Custom printout window, specify which fields should be used for sorting, and which headings should appear in the list.
3. Click **Save**.

7.3 Creating a New Custom Printout

To create a new custom printout, do the following:

1. Click the **Custom Printouts** link under **Change Settings** in the sidebar.
2. In the **Change Settings – Custom Printouts** window, click **New page**.

3. Enter the name of the printout in the **Title** field (for example, Name+ Title+ Organization – it is useful to use the headings included in the printout for easier identification).
4. Select the font and font size from the list in the **Font** area. The font is used on the sort page and the printout.
5. Select the fields to include in your printout from the **Available fields** list by selecting the field and clicking the right arrow. The “->” arrow moves all fields to the **Selected fields** column.
 - a. Select fields to use in your search. All fields that begin with Search record are selection fields that you can use in your search. For example, if you want to be able to select your printout on the basis of Name, Title and Organization tree you select:

Search record – Last name, Search record – First name, Search record – Title, Search Record – Organization tree.

- b.** Select fields to be shown on the printout (fields that start with Record). For example, **Record list – Last name, Record list – First name, Record list – Title and Record list – Organization.**

Change Settings - Custom Printouts

New pageDelete pageResetSave

Select page

Assign all

Title

Min sida1

Min sida1

Available fields

Search record -Allow visitor

Search record -Alt.ext.2

Search record -CMG Speech Office

Search record -CMG Web Search

Search record -Dep1

Search record -Dep2

Search record -Div

Search record -Field1

Search record -Field12

Search record -Field13

Search record -Field14

Search record -Field16

Search record -Field17

Search record -Field19

Search record -Field2

Search record -Field20

Search record -Field21

Search record -Field22

Search record -Field23

Selected fields

Search record -Alt.ext.1

Search record -Click to call

Search record -CMG Web

System name

CMG Web

Max no. of chars

1

Name

Change to system name

CMG Web

No. of chars

Checkbox

Writable

- 6.** Check the **Assign all** box if you want the printout to be available to all users of the CMG DM. Leave the box empty if you only want the printout available to yourself.
- 7.** Click **Save** to save your changes.

The resulting printout looks like this:

Hello

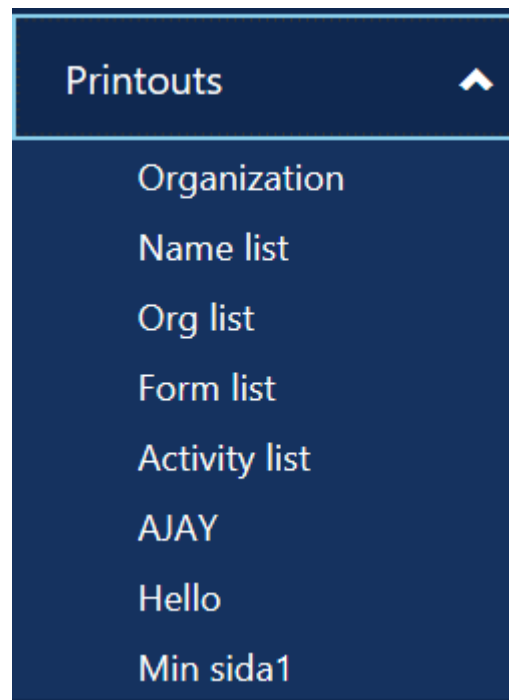
PrintCopy to...

First name	Last name	Title	Organization
User	3501	Senior Software Engineer	CorpA500
User	3502	Senior Software Engineer	CorpA500
User	3503	Senior Software Engineer	CorpA500
User	3504	Senior Software Engineer	CorpA500
User	3505	Senior Software Engineer	CorpA500
User	3506	Senior Software Engineer	CorpA500
User	3507	Senior Software Engineer	CorpA500
User	3508	Senior Software Engineer	CorpA500
User	3509	Senior Software Engineer	CorpA500
User	3510	Senior Software Engineer	CorpA500
User	3511	Senior Testing Engineer	CorpA500
User	3512	Senior Testing Engineer	CorpA500
User	3513	Senior Testing Engineer	CorpA500

79

Directory Manager User Guide

Any printouts that you have created appear in the side bar under Printouts menu.



7.4 Editing Printouts

To change the appearance or content of a custom printout, do the following:

1. Click the **Custom Printouts** link under **Change Settings** in the sidebar.
2. In the **Change Settings – Custom Printouts** window, select the printout you want to edit from the drop-down list under **Select page**.



The printout opens, and you can edit it as necessary.

3. If you want to change the order of the fields in your printout, select the fields you want to move so that they are highlighted in blue. Click the down-arrow once to move the field lower in the list.

The order of the various field types is not changed, only the order within them. For example, you cannot move record list fields to the top of the list, but you can move **Record list – Organization** to be above of **Record list – Title**.

4. Click **Save** to save your changes.

7.5 Merging Fields in a Printout

You can choose to merge any fields in your printout (e.g., merge the Last name and First name fields).

To merge fields in a printout, do the following:

1. Click the **Custom Printouts** link under **Change Settings** in the sidebar.
2. Select the printout you want to edit from the drop-down list under **Select page**.

Select page

Min sida1

3. In the printout window, select the first of the two fields you want to merge (e.g., Record list – Last Name) and enter the name of the new field (e.g., Name) in the Name field.

The number of characters changes to 0. An asterisk appears beside the renamed **Record list – Name** field in the **Selected fields** list, indicating that the field is linked to the field below it (in this case, **Record list – First name**).

Selected fields

Search record -Alt.ext.1

Search record -Click to call

Search record -CMG Web

System name
 Alt.ext.1
Max no. of chars
 60
Name **Change to system name**
 Alt.ext.1
No. of chars
 60
Writable
☐

4. Check the **Writable** check box to ensure you can edit the field at a later date.

5. Click **Save** to save your changes.

The resulting printout looks like this:

Hello

Print
Copy to...

First name	Last name	Title	Organization
User	3501	Senior Software Engineer	CorpA500
User	3502	Senior Software Engineer	CorpA500
User	3503	Senior Software Engineer	CorpA500
User	3504	Senior Software Engineer	CorpA500
User	3505	Senior Software Engineer	CorpA500
User	3506	Senior Software Engineer	CorpA500
User	3507	Senior Software Engineer	CorpA500
User	3508	Senior Software Engineer	CorpA500
User	3509	Senior Software Engineer	CorpA500
User	3510	Senior Software Engineer	CorpA500
User	3511	Senior Testing Engineer	CorpA500
User	3512	Senior Testing Engineer	CorpA500
User	3513	Senior Testing Engineer	CorpA500

7.6 Resorting the Order on the Printout

You can change the sort order on a printout.

Click the heading that is highlighted in blue to designate the field to be sorted on (e.g., **Organization**). If you click once more you change the sort order from ascending to descending.

Hello

Print
Copy to...

First name	Last name	Title	Organization
User	3501	Senior Software Engineer	CorpA500
User	3502	Senior Software Engineer	CorpA500
User	3503	Senior Software Engineer	CorpA500
User	3504	Senior Software Engineer	CorpA500
User	3505	Senior Software Engineer	CorpA500
User	3506	Senior Software Engineer	CorpA500
User	3507	Senior Software Engineer	CorpA500
User	3508	Senior Software Engineer	CorpA500
User	3509	Senior Software Engineer	CorpA500
User	3510	Senior Software Engineer	CorpA500
User	3511	Senior Testing Engineer	CorpA500
User	3512	Senior Testing Engineer	CorpA500
User	3513	Senior Testing Engineer	CorpA500

7.7 Deleting a Printout

To delete a custom printout, do the following:

1. Click the **Custom Printouts** link under **Change Settings** in the sidebar.

2. Select the printout you want to edit from the drop-down list under **Select page**.

Select page

3. Click the **Delete page** button.

This chapter contains the following sections:

- [Colors and Fonts](#)
- [Custom Layouts](#)
- [Miscellaneous](#)

This section provides information about managing various system settings.

You can adapt CMG Directory Manager according to your own needs using the options available under **Change settings** in the side bar. For example, you can change the layout of CMG DM, create your own customized printouts from the database, and select which tabs appear on the **Main form** tab.

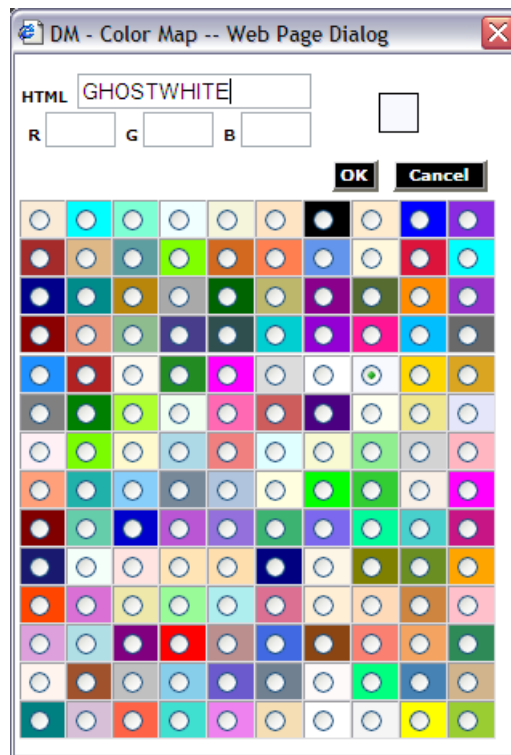
8.1 Colors and Fonts

You can change font, size and color from the **Colors and fonts** link in the side bar under **Change settings**. If you want to undo your settings, you can click on **Default values** and then **Save**. Colors and fonts then return to the default values.

8.1.1 Changing Font, Size and Color

You can change the font size by going into the Size row and selecting 12px.

If you want to change the background color on your main page, you can do this on the Main page row, Background color. Click the color you want or key in the Color name (HTML color codes) or digit combination for R (Red), G (Green), and B (Blue).



Any changes made will only affect your login name.

Note:

The Colors and Fonts settings is only applicable for the Legacy **CMG DM** application.

8.2 Custom Layouts

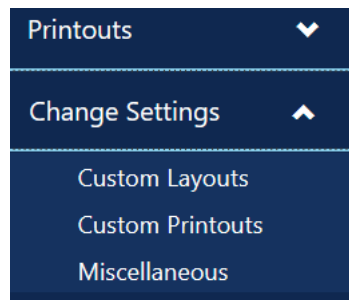
You can change the appearance of the login page in CMG DM, or define your own search form from the **Custom layouts** link in the side bar under **Change settings**.

Custom layouts are listed under the **Records** heading in the side bar.

8.2.1 Creating a Custom Layout

To create a custom layout, do the following:

1. Click the **Custom layouts** link under **Change Settings** in the sidebar.



2. In the **Change Settings – Custom Layouts** window, click **New page**.

Change Settings - Custom Printouts

Select page
 Min sida1

Assign all ☐

Title
 Min sida1

Available fields ➡

- Search record -Allow visitor
- Search record -Alt.ext.2
- Search record -CMG Speech Office
- Search record -CMG Web Search
- Search record -Dep1
- Search record -Dep2
- Search record -Div
- Search record -Field1
- Search record -Field12
- Search record -Field13
- Search record -Field14
- Search record -Field16
- Search record -Field17
- Search record -Field19
- Search record -Field2
- Search record -Field20
- Search record -Field21
- Search record -Field22
- Search record -Field23

Selected fields ⚙

- Search record -Alt.ext.1
- Search record -Click to call
- Search record -CMG Web

System name
CMG Web

Max no. of chars
1

Name

No. of chars

Writable
☐

3. Enter the name of the custom layout in the **Title** field (for example, "Custom Layout1").
4. Select the font and font size for the layout from the list in the **Font** area.
5. Select the fields to include in your layout from the **Available fields** list by selecting the field and clicking the right arrow. The "→" arrow moves all fields to the **Selected fields** column.

If you are creating a custom search form, for example, you can select any field that begins with **Search record**. If you want to select on the basis of Name, Title and

Organization tree, you select **Search record – Last name**, **Search record – First name**, **Search record – Title**, **Search Record – Organization tree**.

Change Settings - Custom Layouts

New pageDelete pageResetSave

Select pageMin sida0

Assign all☐

TitleMin sida0

Available fields

Search record -Msgsys4
Search record -Name directory
Search record -Name Search
Search record -Org 1
Search record -Org 2
Search record -Org Directory
Search record -Organization
Search record -PBX ID
Search record -Picture
Search record -Room
Search record -Secret mobile
Search record -Secret Phone
Search record -Time zone
Search record -User group
Search record -Voicemail users
Search record -Workgroup
Search record -Wrkgpr.admin.
Record list -Act Date
Record list -Allow visitor

Selected fields

Search record -Last name
Search record -First name
Search record -Dep1
Search record -Dep2
Search record -Personal number
Search record -Phone
Search record -Title
Search record -Organization tree

System name

Organization tree

Max no. of chars

30

Name

Change to system name

Organization tree

No. of chars

30

Writable

☐

The resulting custom search form looks like this:

Form list

SearchClear

Last name

First name

Phone

Organization

6. Select which fields are to be shown in the custom record list. For example, **Record list – Last name, Record list – First name, Record list – Title and Record list – Organization.**

Change Settings - Custom Layouts

Select page
 Assign all ☐
 Title

Available fields

- Search record -Msgsys4
- Search record -Name directory
- Search record -Name Search
- Search record -Org 1
- Search record -Org 2
- Search record -Org Directory
- Search record -Organization
- Search record -PBX ID
- Search record -Picture
- Search record -Room
- Search record -Secret mobile
- Search record -Secret Phone
- Search record -Time zone
- Search record -User group
- Search record -Voicemail users
- Search record -Workgroup
- Search record -Wrkgp.admin.
- Record list -Act Date
- Record list -Allow visitor

Selected fields

- Search record -Last name
- Search record -First name
- Search record -Dep1
- Search record -Dep2
- Search record -Personal number
- Search record -Phone
- Search record -Title
- Search record -Organization tree

System name
Organization tree

Max no. of chars
30

Name

No. of chars

Writable
☐

7. To change the order of the fields in the layout, select the fields to move so that they are highlighted in blue. Click the down-arrow once to move the field lower in the list.
8. Check the **Assign all** box if you want the layout to be available to all users of the CMG DM. Leave the box empty if you only want the printout available to yourself.
9. Click **Save** to save your custom layout.

Note:

You can merge fields in a custom layout in the same way as with custom printouts. See section 8.2.3 for more information.

The custom layout appears on the first page, search record, record list and change form.

8.2.2 Editing custom Layouts

To change the appearance or content of a custom layout, do the following:

1. Click the **Custom Layouts** link under **Change Settings** in the sidebar.
2. In the **Change Settings – Custom Layouts** window, select the layout you want to edit from the drop-down list under **Select page**.

Select page

The layout opens, and you can edit it as necessary.

3. Click **Save** to save your changes.

8.2.3 Merging Fields in a Custom Layout

You can choose to merge any fields in your layout – for example, it is common to merge the Last name and First name fields in the Record list.

To merge fields in a custom layout, do the following:

1. Click the **Custom Layouts** link under **Change Settings** in the sidebar.
2. Select the printout you want to edit from the drop-down list under **Select page**.

Select page

3. In the custom layout window, select the first of the two fields you want to merge (e.g., **Record list – Last Name**) and enter the name of the new field (e.g., Name) in the **Name** field.

The number of characters changes to 0. An asterisk appears beside the renamed **Record list – Name** field in the **Selected fields** list, indicating that the field is linked to the field below it (in this case, **Record list – First name**).

Selected fields

Search record -Alt.ext.1

Search record -Click to call

Search record -CMG Web

System name
Alt.ext.1
Max no. of chars
60
Name **Change to system name**

Alt.ext.1

No. of chars

60

Writable
☐

4. Check the **Writable** check box to ensure you can edit the field at a later date.
5. Click **Save** to save your changes.

The resulting Record list looks like this

Print

Copy to...

First name

Last name

Title

Organization

User

3501

Senior Software Engineer

CorpA500

User

3502

Senior Software Engineer

CorpA500

User

3503

Senior Software Engineer

CorpA500

User

3504

Senior Software Engineer

CorpA500

User

3505

Senior Software Engineer

CorpA500

User

3506

Senior Software Engineer

CorpA500

User

3507

Senior Software Engineer

CorpA500

User

3508

Senior Software Engineer

CorpA500

User

3509

Senior Software Engineer

CorpA500

User

3510

Senior Software Engineer

CorpA500

User

3511

Senior Testing Engineer

CorpA500

User

3512

Senior Testing Engineer

CorpA500

User

3513

Senior Testing Engineer

CorpA500

User

3514

Senior Testing Engineer

CorpA500

User

3515

Senior Testing Engineer

CorpA500

User

3516

Senior Testing Engineer

CorpA500

8.2.4 Re-sorting results Order of Custom Layouts

You can change the sort order on a layout.

Click the heading that is highlighted in blue to designate the field to be sorted on (e.g., **Organization**). If you click once more, you change the sort order from ascending to descending.

Hello

Print

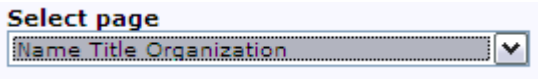
Copy to...

First name	Last name	Title	Organization
User	3501	Senior Software Engineer	CorpA500
User	3502	Senior Software Engineer	CorpA500
User	3503	Senior Software Engineer	CorpA500
User	3504	Senior Software Engineer	CorpA500
User	3505	Senior Software Engineer	CorpA500
User	3506	Senior Software Engineer	CorpA500
User	3507	Senior Software Engineer	CorpA500
User	3508	Senior Software Engineer	CorpA500
User	3509	Senior Software Engineer	CorpA500
User	3510	Senior Software Engineer	CorpA500
User	3511	Senior Testing Engineer	CorpA500
User	3512	Senior Testing Engineer	CorpA500
User	3513	Senior Testing Engineer	CorpA500
User	3514	Senior Testing Engineer	CorpA500
User	3515	Senior Testing Engineer	CorpA500
User	3516	Senior Testing Engineer	CorpA500

8.2.5 Deleting a Custom Layout

To delete a custom layout, do the following:

- 1. Click the **Custom Layouts** link under **Change Settings** in the sidebar.
- 2. Select the layout you want to edit from the drop-down list under **Select page**.



- 3. Click the **Delete page** button.

8.3 Miscellaneous

You can control certain aspects of CMG DM behavior from the **Miscellaneous** link in the side bar under **Change settings**. These settings are linked to your login name.

To configure these settings, do the following:

- 1. Click the **Miscellaneous** link under **Change Settings** in the sidebar.

2. In the **Change Settings – Miscellaneous** window, specify values for the following parameters:

- autoSave: number of minutes before the system asks the user to save changes
- autoCapitalizeName: enables automatic capitalization of the first letter in the last name and first name fields in the main form. It is recommended that this is set at No as it is sometimes desirable to have names with lower case letters (e.g., von, de). These fields can also contain information that is not a name.
- datePicker: enables the built-in calendar for selecting a date. If not enabled, you must enter the date in format YYYY-MM-DD.
- ActiveXOrgtreeIncluded: enables the graphical representation of the organization tree (requires that Active X be installed on the computer).
- maxFormPrefetchCount: number of user forms the system imports in advance. A low number means that you quickly reach the main form, but it takes a little bit longer to browse between the different users. A high number means a more time to load the main form, but faster browsing between users.
- maxOrgFetchCount: number of organization units and sub-units the system imports in advance. If the organization tree does not display all “branches” in full when you browse, increase the value of maxOrgFetchCount (e.g., 100).
- showPhonetics: determines whether or not the system’s auto-generated phonetic spelling options are to appear under the Phonetic tab.

Change Settings - Miscellaneous

Reset

Save

Defaults

autoSave

5

Number of minutes the system waits before prompting the user to save changes.

autoCapitalizeName

Yes

Automatic conversion of the first letter in the Last name and First name fields in the Main form.

datePicker

Yes

ActiveXOrgtreeIncluded

No

maxFormPrefetchCount

4

maxOrgFetchCount

300

showPhonetics

Yes

Show automatically generated names in the phonetic tab found in the main subscriber form

Main Form

Available fields

Selected fields

Phonetic
Organization
Keywords
Recurr.Act.
Settings

3. In the lower part of the **Change Settings – Miscellaneous** page, you can define which tabs appear for each user and in which order.

4. If you want to restore system default values, click the **Defaults** button.

5. Click **Save** to save your changes.

This chapter contains the following sections:

- [Managing Directories](#)
- [Managing Records](#)

This section provides information on getting started with Quick Info Manager.

Quick Info Manager is a tool that helps you structure useful information that is outside the user directory. For example, you can group useful information together such as taxi firms, courier services and hotels.

In Quick Info Manager, you can set up various directories, and add and change records in those directories. The directories can either be forms with information structured in different named text fields or in free text format.

The information in Quick Info is available for attendants and/or office users in the Attendant client and CMG Web software.

9.1 Managing Directories

You can create three different kinds of directories in Quick Info: Text Field, Bulletin Board and Free text.

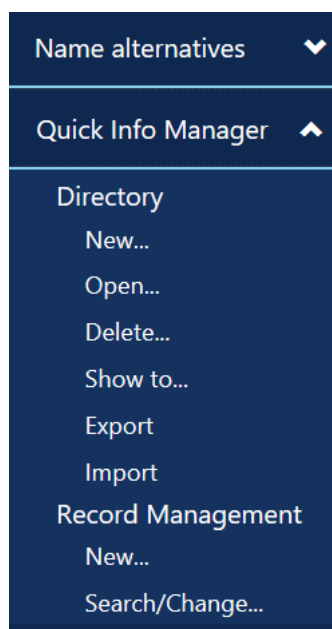
9.1.1 Creating a Text Field Directory

Directories with text fields are suitable for information that is structured. Each record in the directory consists of a form with predefined fields.

To create a new Text Field directory, do the following:

1. Click **Quick Info Manager** in the side bar.

Select the **Directory** sub-heading and then click **New**.



The New Directory page opens.

Save

New Directory

New Directory :

Directory type :

Text field

☒

Enable operator view

☒

Enable Office/CMG Web

Field name:

New

Change

Delete

----- new fields shown here -----

The field...

☐

 is shown at search

☐

 can be searched

☐

 can be updated by operator (only for CMG NOW and CMG Office)

☐

 has a www link

☐

 has a phone no. link

☐

 has a mailto link

2. Enter a name for the directory in the **Directory** field (e.g., Tax, Card number, Addresses).
3. Select the **Text field** option from the drop-down menu in the **Directory type** field.
4. Check the **Enable operator view** box if you want to make the directory visible to all attendants using the Attendant client and all receptionists in CMG Visit.
5. Check the **Enable office user view** box if you want to make the directory visible to all office users in CMG Web.
6. Create a new field.
 - a. Click the **New** button. A dialog box opens:

Quick Info Manager

Field name:

The field...

☒ is shown at search

☒ can be searched

☐ can be updated by operator (only for CMG NOW and CMG Office)

☐ has a www link

☐ has a phone no. link

☐ has a mailto link

OK Cancel

- b. Enter a name in the **Field name** box.
- c. Assign properties to the field by enabling the following attributes:
 - **is shown at search:** determines whether the field shows up in search results that contain several hits. If there are many fields in the directory, it makes sense not to show certain fields in hotlists, as too many fields can be confusing. Make sure that important fields such as Name and Phone number are shown in searches.
 - **can be searched:** determines whether the field is searchable. There is only one search field in Quick Info, so a search generates hits from all searchable fields.

Do not enable this attributes for information that does not need to be searchable to avoid unnecessary hits.

- **can be updated by operator:** determines whether the attendant can change the information in this field from the Attendant client.
- **has a www link:** determines whether the field appears as a clickable link for attendants and office users (used if the field contains a website address).
- **has a phone no. link:** determines whether the field appears as a clickable link for attendants and office users (attendants can call the number by clicking the link or clicking Dial number in the Attendant client).

d. Click **OK**.

The new field appears in the field list.

The screenshot shows the 'Field name:' input box containing 'card details'. Below it are three buttons: 'New', 'Change', and 'Delete'. To the right is a list box titled '----- new fields shown here ----' containing 'card details'. Further right is a section titled 'The field...' with several checkboxes: 'is shown at search' (checked), 'can be searched' (checked), 'can be updated by operator (only for CMG NOW and CMG Office)' (unchecked), 'has a www link' (unchecked), 'has a phone no. link' (unchecked), and 'has a mailto link' (unchecked). Up and down arrows are positioned between the list box and the checkbox section.

7. Repeat step 6 to create more fields.

8. If you want to change the order of the fields, select the field you want to move and click the up or down arrows.

i Note:

Ensure that the fields are in the order you want when you create the directory. When you have saved the directory, you can no longer change the order of the fields, or add or delete fields if the directory contains information.

9. Click **Save** to save your changes.

9.1.2 Creating a Bulletin Board Directory

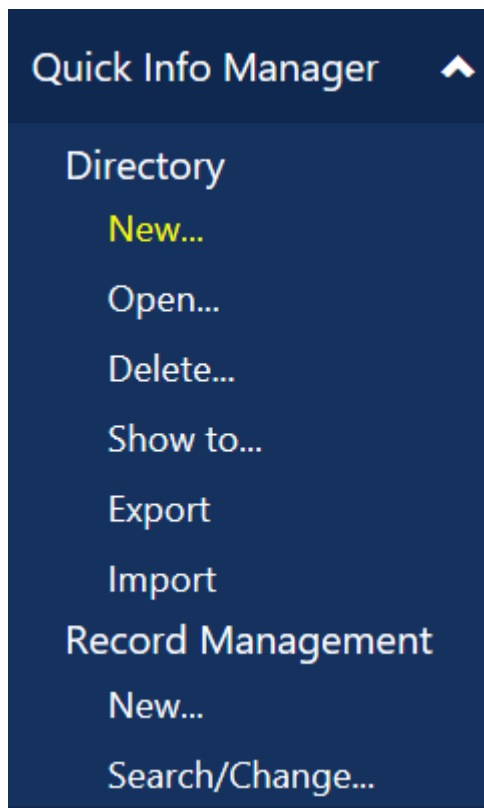
A bulletin board can be used as an information screen for attendants. The bulletin board appears as the start page when the attendant logs in (on the condition that the Attendant client is installed to start with Quick Info).

If the Bulletin Board is shown to office users, it appears as the start screen in Quick Info in CMG Web.

If you have created several bulletin boards, the bulletin board that is first in alphabetical order appears as the start screen. The bulletin board can also be used to open a website on the Intranet or Internet.

To create a bulletin board directory, do the following:

1. Click **Quick Info Manager** in the side bar. Select the **Directory** sub-heading and then click New.



The New Directory page opens:

New Directory

New Directory :

Directory type : Bulletin board (1 record) ▼

☒ Enable operator view

☒ Enable Office/CMG Web

Field name:

----- new fields shown here -----

The field...

- ☐ is shown at search
- ☐ can be searched
- ☐ can be updated by operator (only for CMG NOW and CMG Office)
- ☐ has a www link
- ☐ has a phone no. link
- ☐ has a mailto link

2. Enter a name for the directory in the **Directory** field (e.g., Bulletin Board, Today's Info).
3. Select the **Bulletin Board** option from the drop-down menu in the **Directory type** field.
4. Check the **Enable operator view** box if you want to make the directory visible to all attendants using the Attendant client and all receptionists in CMG Visit.
5. Check the **Enable office user view** box if you want to make the directory visible to all office users in CMG Web.

6. Create a field for the directory. A bulletin board can only have one field.

a. Click the **New** button.

A dialog box opens.

Quick Info Manager

Field name:

The field...

☒ is shown at search

☒ can be searched

☐ can be updated by operator (only for CMG NOW and CMG Office)

☐ has a www link

☐ has a phone no. link

☐ has a mailto link

OK **Cancel**

b. Enter a name in the **Field name** box. The bulletin board's field name is not shown and can be anything at all.

c. Assign properties to the field by enabling the following attributes:

- **is shown at search:** determines whether the field shows up in search results that contain several hits. Must always be enabled for a bulletin board.
- **can be searched:** determines whether the field is searchable. Must always be enabled for a bulletin board.
- **can be updated by operator:** determines whether the attendant can change the information in the bulletin board from the Attendant client.
- **has a www link:** determines whether the field appears as a clickable link for attendants and office users. Must be disabled for a bulletin board.
- **has a phone no. link:** determines whether the field appears as a clickable link for attendants and office users. Must be disabled for a bulletin bBoard.

d. Click **OK**.

The new field appears in the field list.

Field name:

name

New

Change

Delete

----- new fields shown here -----

name

The field...

- ☒ is shown at search
- ☒ can be searched
- ☐ can be updated by operator (only for CMG NOW and CMG Office)
- ☐ has a www link
- ☐ has a phone no. link
- ☐ has a mailto link

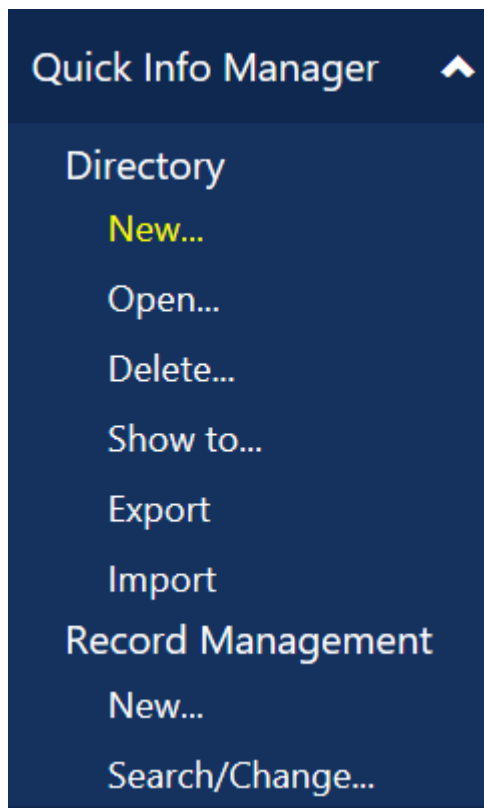
7. Click **Save** to save your changes.

9.1.3 Creating a New Free Text Directory

Free text directories can be used when you want to register information that is not suitable in structured form. These can be instructions, route descriptions, web links or other free text.

To create a free text directory, do the following:

1. Click **Quick Info Manager** in the side bar. Select the **Directory** sub-heading and then click New.



The **New Directory** page opens.

New Directory

New Directory :

Directory type : Free text ▼

☒ Enable operator view

☒ Enable Office/CMG Web

Field name:

name

----- new fields shown here -----

name

The field...

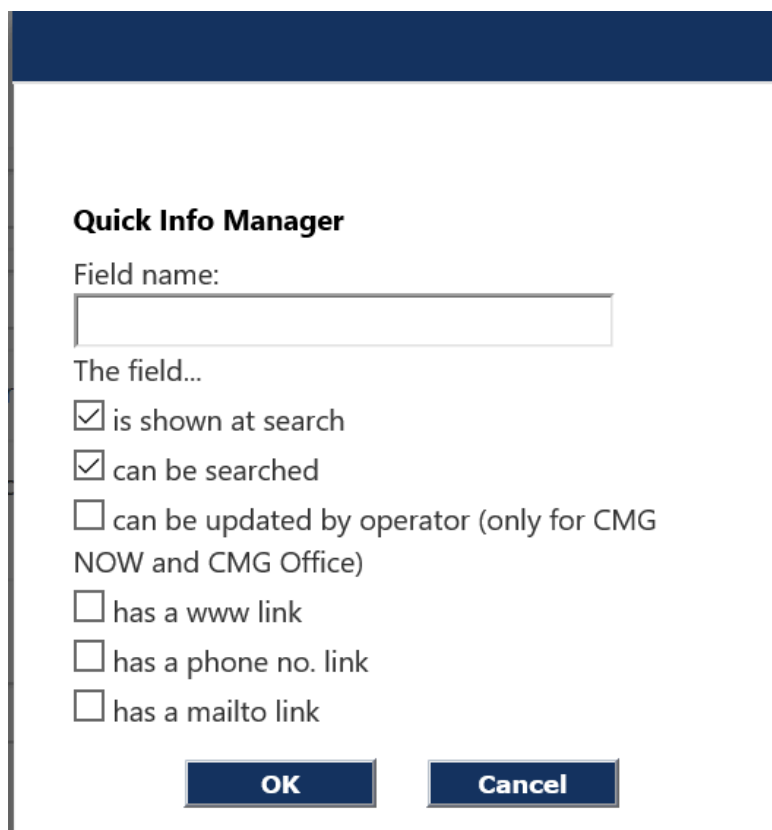
- ☒ is shown at search
- ☒ can be searched
- ☐ can be updated by operator (only for CMG NOW and CMG Office)
- ☐ has a www link
- ☐ has a phone no. link
- ☐ has a mailto link

2. Enter a name for the directory in the **Directory** field (e.g., Alarm instructions, Route descriptions, Useful@links).
3. Select the **Free Text** option from the drop-down menu in the **Directory type** field.
4. Check the **Enable operator view** box if you want to make the directory visible to all attendants using the Attendant client and all receptionists in CMG Visit.
5. Check the **Enable office user view** box if you want to make the directory visible to all office users in CMG Web.

6. Create a field for the directory. A free text directory can only have one field.

a. Click the **New** button.

A dialog box opens.



The screenshot shows a dialog box titled "Quick Info Manager". It contains a "Field name:" label followed by an empty text input box. Below this is the label "The field..." followed by a list of checkboxes:

- ☒ is shown at search
- ☒ can be searched
- ☐ can be updated by operator (only for CMG NOW and CMG Office)
- ☐ has a www link
- ☐ has a phone no. link
- ☐ has a mailto link

 At the bottom right of the dialog are two buttons: "OK" and "Cancel".

b. Enter a name in the **Field name** box. The free text directory's field name is not shown and can be anything at all.

c. Assign properties to the field by enabling the following attributes:

- **is shown at search:** determines whether the field shows up in search results that contain several hits. Must always be enabled for a free text directory.
- **can be searched:** determines whether the field is searchable. Must always be enabled for a free text directory.
- **can be updated by operator:** determines whether the attendant can change the information in the free text directory from the Attendant client.
- **has a www link:** determines whether the field appears as a clickable link for attendants and office users. Must be disabled for a free text directory.
- **has a phone no. link:** determines whether the field appears as a clickable link for attendants and office users. Must be disabled for a free text directory.

d. Click **OK**.

The new field appears in the field list.

7. Click **Save** to save your changes.

9.1.4 Editing Directories

Options for editing a directory in CMG DM are limited. You can edit field attributes, change whether fields are searchable, have a telephone or www link, and whether the attendant can update them.

To edit a directory, do the following:

1. Click **Quick Info Manager** in the side bar. Select the Directory sub-heading and then click Open.

The system displays a list of the directories you have defined in CMG DM.

2. Select the directory you want to edit and click **Open**.

3. In the directory window, select the field you want to change and click **Change**.

Field name:

New **Change** **Delete**

----- new fields shown here -----

- name
- name2**

The field...

- ☒ is shown at search
- ☒ can be searched
- ☐ can be updated by operator (only for CMG NOW and CMG Office)
- ☐ has a www link
- ☐ has a phone no. link
- ☐ has a mailto link

A dialog box opens.

4. Enable or disable the field attributes as required and click OK.

Quick Info Manager

Field name:

The field...

- ☒ is shown at search
- ☒ can be searched
- ☐ can be updated by operator (only for CMG NOW and CMG Office)
- ☐ has a www link
- ☐ has a phone no. link
- ☐ has a mailto link

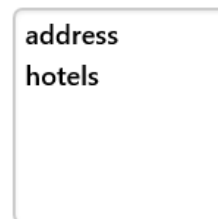
OK **Cancel**

9.1.5 Deleting Directories

To delete a directory, do the following:

1. Click **Quick Info Manager** in the side bar. Select the **Directory** sub-heading and then click Delete.

The system displays a list of the directories you have defined in CMG DM.



2. Select the directory that you want to delete and click **Delete**.
3. Click **Yes** in the confirmation dialog box to confirm deletion of the directory.

Note:

All records in the directory will be deleted when you delete the directory.

9.1.6 Exporting and Importing Directories

The best way to edit Text field directories is to export them into Excel and make your changes there. Directories of the type Bulletin Board and Free text are best edited directly in CMG DM.

To export a directory, do the following:

1. Click **Quick Info Manager** in the side bar. Select the **Directory** sub-heading and then click **Export**.

The system displays a list of the directories you have defined in CMG DM.



The screenshot shows a dark blue button labeled "Export". Below it is a light gray rectangular box containing a list of directories: "address" and "hotels". To the right of the list is a vertical scrollbar. Below the list box, the text "Format :" is displayed. Underneath this is a dropdown menu currently showing "Text (Excel)" with a downward arrow on the right.

2. Select the directory to which you want to export (the **Format** field must be "Text (Excel)") and click **Export**.

The contents of the directory appear in a new window in your browser.

3. Select **File -> Save As** to export the file.

- a. Specify a name for the file.
- b. Change the file type to text file (.txt).
- c. Click **Save**.

4. Launch Excel and open your saved file.

Excel starts its Text Import Wizard.

5. Click **Next>** in the Text Import Wizard until you reach step 3. Change Column data format from "General" to "Text". This means that Excel will not remove any zeros at the beginning of numbers (e.g., area codes).

Note:

- The top five rows must not be edited as the system uses these rows to identify the import file.
- Row seven specifies the name of your directory.
- Above each column heading there is a row with 1s and 0s (1|0|1|1|0); these describe the field's attributes, for example www link, telephone link.

6. To add a column, select the column that you want to insert a column to the left of. Right-click on the heading (for example D) and select Insert.

Note:

The row above the heading must consist of 1s or 0s (1|0|1|1|0) (Tip: copy from an adjacent column).

7. Add the information required.

Note:

Do not change the appearance of the last two columns. Their names must remain \$sign and \$hidden.

8. Save your edited file. Ensure that the file type is Text (Tab delimited). You can change the name of the file by adding a figure after the name (Hotell2.txt). Ignore the warning from Excel that some information may be lost due to the choice of file format and save the file.
9. Return to CMG DM. Go in under Quick Info Manager – Directory – Import. Locate your saved file. Enter a new name in the New Directory field (so that you do not confuse the edited directory with the original). Click Import. You receive conformation that the import was successful.

Return to the CMG DM to import the directory file.

Do the following:

1. Click **Quick Info Manager** in the side bar. Select the **Directory** sub-heading and then click **Import**.
2. Locate you saved file.
3. Enter a new name in the **New Directory** field and click **Import**.

The system displays a confirmation message that the import was successful.

To verify your changes, open the attendant software or CMG Web. Make sure you refresh the interface to see the changes.

9.2 Managing Records

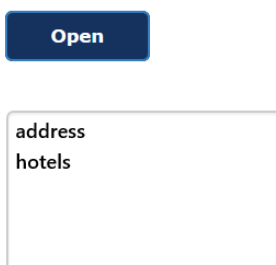
You must add a record to each new directory you create. You can also edit and delete records.

9.2.1 Adding a New Record to a Text Field Directory

To add a new record to a text field directory, do the following:

1. Click **Quick Info Manager** in the side bar. Select the **Record Management** sub-heading and then click **New**.

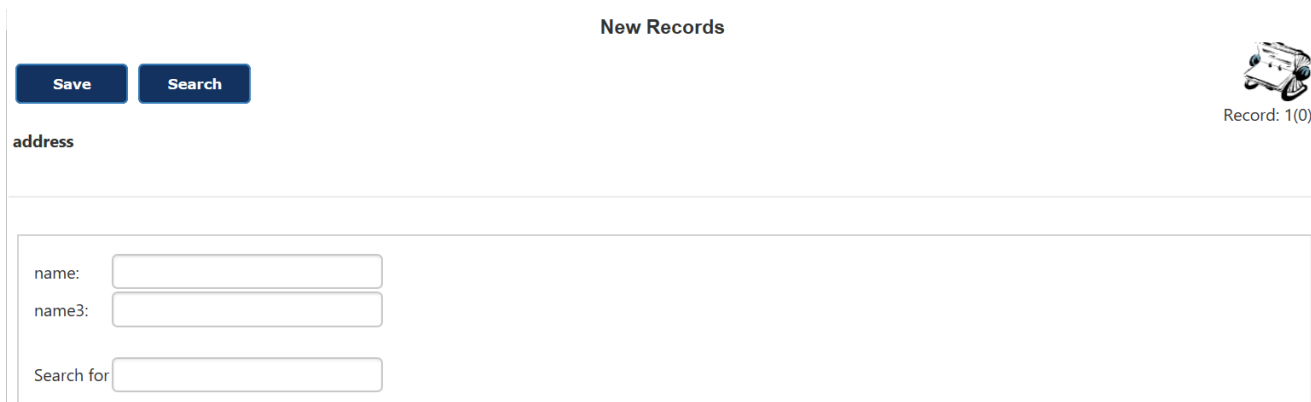
The system displays a list of the directories you have defined in CMG DM.



The image shows a user interface element consisting of a dark blue button labeled "Open" positioned above a text input field. The input field has a light gray border and contains the text "address" on the first line and "hotels" on the second line.

2. Select the directory to which you want to add information and click **Open**.

A **New Records** window opens:



New Records

Record: 1(0)

Save Search

address

name:

name3:

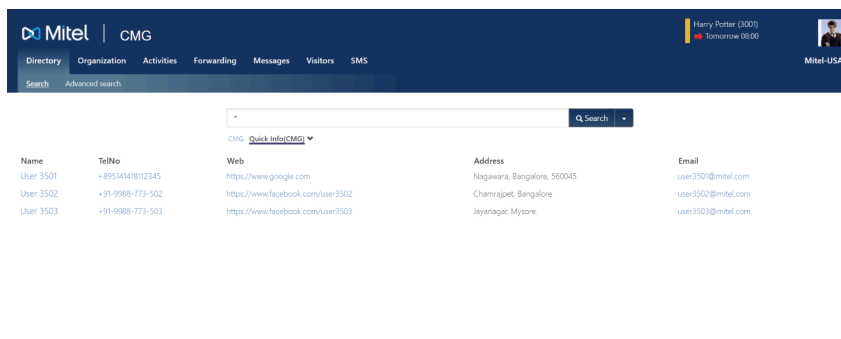
Search for:

3. Enter information in the text fields. Note that the web address is written in the format www.abc.se (that is, without <http://>). The **Search for** field (under your predefined fields), enables you to add extra search terms.

4. Click **Save**.

A new, empty form appears.

Continue to enter information until you are satisfied. To check the result, open the attendant software or CMG Web.



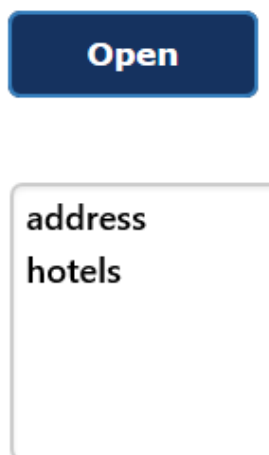
Name	TelNo	Web	Address	Email
User 3501	+9954418112345	https://www.google.com	Nagawara, Bangalore, 560045	user3501@mitel.com
User 3502	+91-9988-773-502	https://www.facebook.com/user3502	Chamrajpet, Bangalore	user3502@mitel.com
User 3503	+91-9988-773-503	https://www.facebook.com/user3503	Jayanagar, Mysore	user3503@mitel.com

9.2.2 Adding a New Record to a Bulletin Board Directory

To add a new record to a bulletin board, do the following:

1. Click **Quick Info Manager** in the side bar. Select the **Record Management** sub-heading and then click **New**.

The system displays a list of the directories you have defined in CMG DM.



2. Select the directory to which you want to add information and click **Open**.

A New Records window opens.

 A screenshot of a web application window titled 'New Records'. On the left, there are two buttons: 'Save' and 'Search'. Below them is the text 'hotels'. On the right, there is a printer icon and the text 'Record: 1(0)'. The main area contains two input fields: the first is labeled 'name2:' and the second is labeled 'Search for'.

3. Enter the information that you want to show on the bulletin board. If attendants are to be able to update the information on the bulletin board, it must contain some information from the outset. An empty bulletin board cannot be updated.
4. Click **Save**.

To check the result, open the attendant software or CMG Web.

9.2.3 Adding a New Record to a Free Text Directory

To add a new record to the directory, do the following:

1. Click **Quick Info Manager** in the side bar. Select the **Record Management** sub-heading and then click **New**.

The system displays a list of the directories you have defined in CMG DM.

Open

address
^

free text

hotels

tree
v

2. Select the directory to which you want to add information and click **Open**.

A **New Records** window opens.

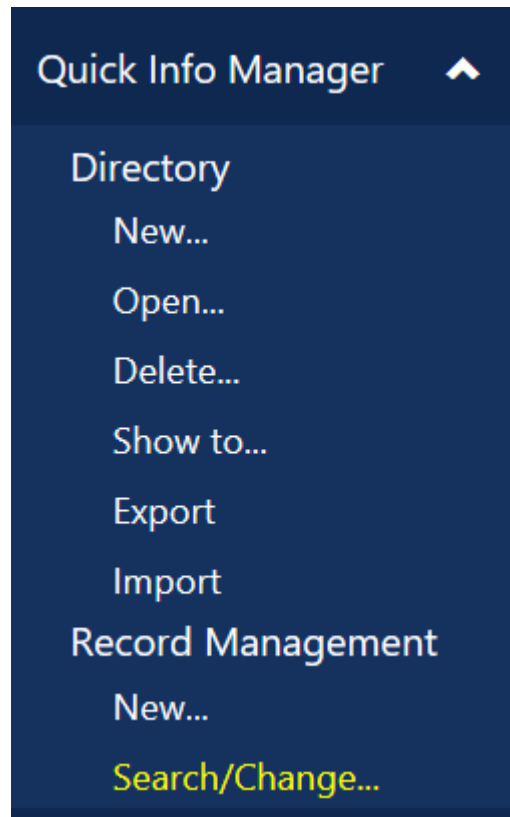
3. Enter the information that you want to show in the free text field. If you want to enter web links, use the format `http://www.mitel.com`. Click **Save** between each link.

To check the result, open the attendant software or CMG Web. Do not forget to update to see the changes.

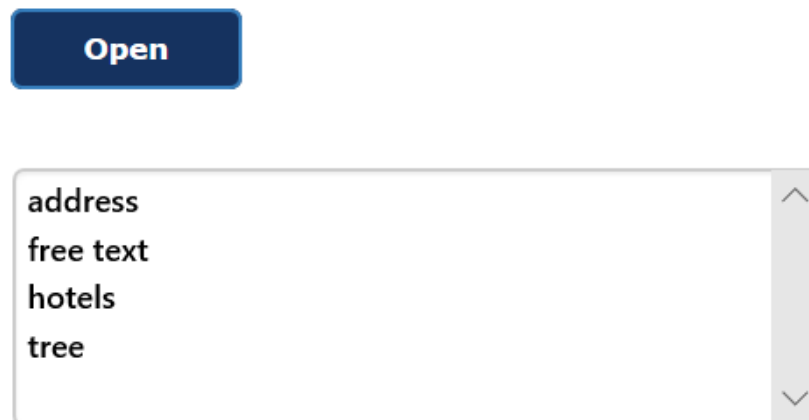
9.2.4 Editing a Record

To edit a record that has already been added to a directory, do the following:

1. Click **Quick Info Manager** in the side bar. Select the **Record Management** sub-heading and then click **Search/Change**.



The system displays a list of the directories defined in CMG DM.



2. Select the directory in which you want to perform an update or add a record. Click **Open**.

The system displays the records you created previously.

3. Select the record that you want to edit.
4. Make the necessary changes to the record and click **Save**.

9.2.5 Deleting a Record

To delete a record that has already been added to a directory, do the following:

1. Click **Quick Info Manager** in the side bar. Select the **Record Management** sub-heading and then click **Search/Change**.
2. Select the directory from which you want to delete a record. Click **Open**.

The system displays a list of the directories defined in CMG DM.

3. Select the record you want to delete and click **Delete**.

A confirmation dialog appears.

4. Click **Yes** to confirm the record deletion.

The system displays a confirmation message that the record has been deleted.

This chapter contains the following sections:

- [CMG DM Shortcuts](#)
- [Search View \(F9\) Shortcuts](#)
- [Record List View \(F10\) Shortcuts](#)
- [Record Layout Shortcuts](#)
- [Main Form Shortcuts](#)
- [Phonetics Shortcuts](#)
- [Organization Shortcuts](#)
- [Keywords Shortcuts](#)
- [Recurring Activity Shortcuts](#)
- [Organization Administration Shortcuts](#)
- [Keywords Administration Shortcuts](#)
- [Color Description](#)

This section summarizes the shortcuts available in various views of the CMG DM.

10.1 CMG DM Shortcuts

Display help	F1
Go to Search Record	F9
Go to Record List	F10
Go to Main Form	F12
Go to New Record	F2
Move cursor to Quick search	Alt+1
Save	Ctrl+S

10.2 Search View (F9) Shortcuts

Search	Alt+S or Enter
Clear	Alt+R

10.3 Record List View (F10) Shortcuts

Select all records	Alt+M
--------------------	-------

Delete selected records	Alt+T
Group change, modify selected records	Alt+G
Select only previous record (one up)	Arrow up
Select only next row (one down)	Arrow down
Select also previous record (one up)	Shift+Arrow up
Select also next row (one down)	Shift+Arrow down
Unselect current selection	Space
Move cursor up, keep selected	Ctrl+Arrow up
Move cursor down, keep selected	Ctrl+Arrow down
Show Main Record for selected (one)	Enter
Go to the first row of the page	Page up
Go to the first row of the previous page	Page up again
Go to the last row of the page	Page down
Go to the last row of the next page	Page down again
Go to the first row of the first page	Home
Go to the last row of the last page	End

10.4 Record Layout Shortcuts

Previous record	F7
Next record	F8
Save	Ctrl+S
Reset	Alt+R
Move between the tabs	Ctrl+Arrow left or Arrow right

10.5 Main Form Shortcuts

Copy record	Alt+K
Delete record	Alt+T
New change form	Alt+U

10.6 Phonetics Shortcuts

New Last Name (Family name)	Alt+E
New First Name	Alt+F

10.7 Organization Shortcuts

Add	Alt+L
-----	-------

10.8 Keywords Shortcuts

New keyword	Alt+N
Show similar keyword	Enter
Close window "Show similar keywords"	Escape

10.9 Recurring Activity Shortcuts

New recurring activity	Alt+N
Show/hide calendar	Alt+K
Close window "New recurring activity"	Escape

10.10 Organization Administration Shortcuts

New unit	Alt+N
Delete	Alt+T
Save	Alt+S
Move up	Ctrl+Arrow up
Move down	Ctrl+Arrow down
Show records	Alt+V

10.11 Keywords Administration Shortcuts

New keyword	Alt+N
Save	Alt+S
Reset	Alt+R

10.12 Color Description

When adding, modifying or delete information, the changes are shown in different colors as described below. The changes are applied after pressing the Save button (Ctrl+S).

- Yellow - When adding new information, the field turns yellow:

Customer care

- Orange - When changing existing text, the field turns orange:

Art director

- Red - When removing information, the field turns red and a line is run through the text:

Marketing plans

Make sure you save as soon as you have changed any information. The new/changed information does not take effect until you save it.

