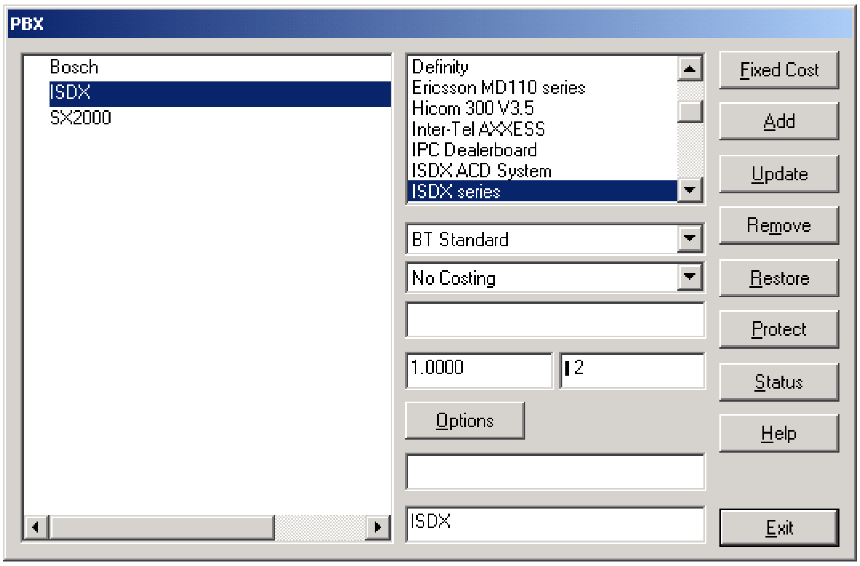
# PBX Menu

This area stores most of the fundamentals regarding the PBX information. The auto-learnt Extensions, Trunks and Operators. The Access and Account Code settings. There is also the Costing information.

## PBX

List of current PXB's




This forms part of the installation set-up. Here the information regarding your PBX is selected. THE PBX SELECTION MUST NOT BE CHANGED WITHOUT PRIOR DISCUSSION WITH **FOCOM LIMITED**. Any changes may invalidate your maintenance contract. It is not generally possible for a customer to be able to [Add] a new PBX to the system, the exception will be made, for example, where the system is used for peripatetic logging.

**[Fixed Costs]** For a full explanation on setting up Fixed Costs, please see the System Management Section.

**PBX Type**: Lists the PBX Analysis programs in use by the system.

**Costing Style**: Shows the default costing style for outgoing calls. This can be overridden under PBX>Trunks, see page 117 of this section.

**I/C Costing:** Insert here the default costing style for incoming calls. To do this you will need to be able to see the CLI or have a fixed cost per call. In order to see the CLI location on your reports, the incoming calls will be associated with a tariff. (If you are not interested in incoming call costs, you need not select this column in your reports, the tariff selection is there purely to be able to reference the CLI location). Once again, this can be overridden at the PBX>Trunk selection menu.

**Node ID:** The PBX network address.

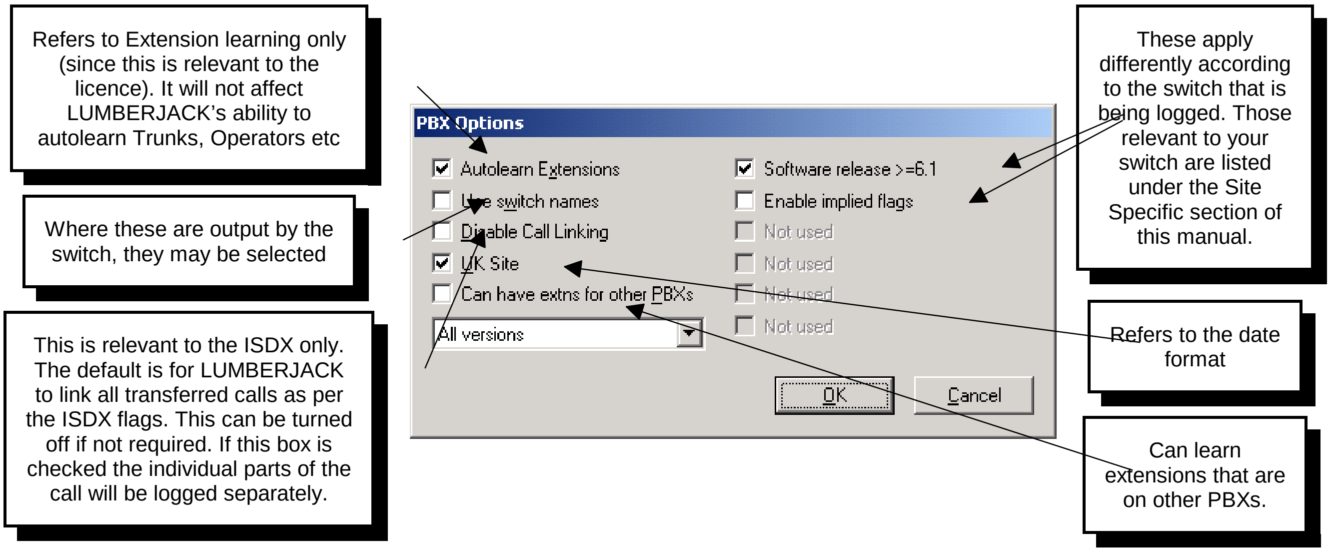
**Exchange Rate**: Where logging international sites, enter the exchange rate here. This will allow you to run reports where the international tariff rate stored can be translated into £ sterling. Any change to this area will require the system to be Recached before the update is acknowledged. (see Recache System on page 97 of this section, and page 155 of the System Management section.)

**Local currency**: Insert here the local PBX currency and the number of decimal places the costs should show. E.g. £ 0 will show costs in the British format of pounds sterling with no decimal places; 2 € will show costs in Euros with two decimal places and the currency symbol coming after the amount. This allows the cost to be stored correctly on the database.

**Additional Settings**: These settings have a different purpose depending on the switch being logged. See Site Specific section for description of these settings

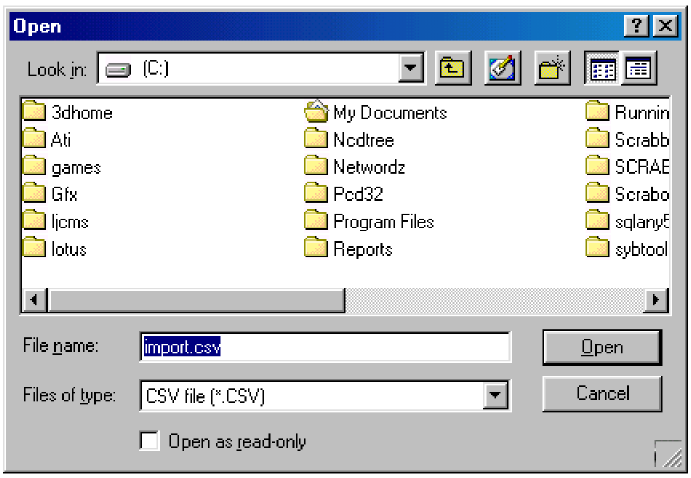
**Description**: PBX set up description in up to 31 characters.

The following series check boxes are found under the [Options] button:




## Import PBX File

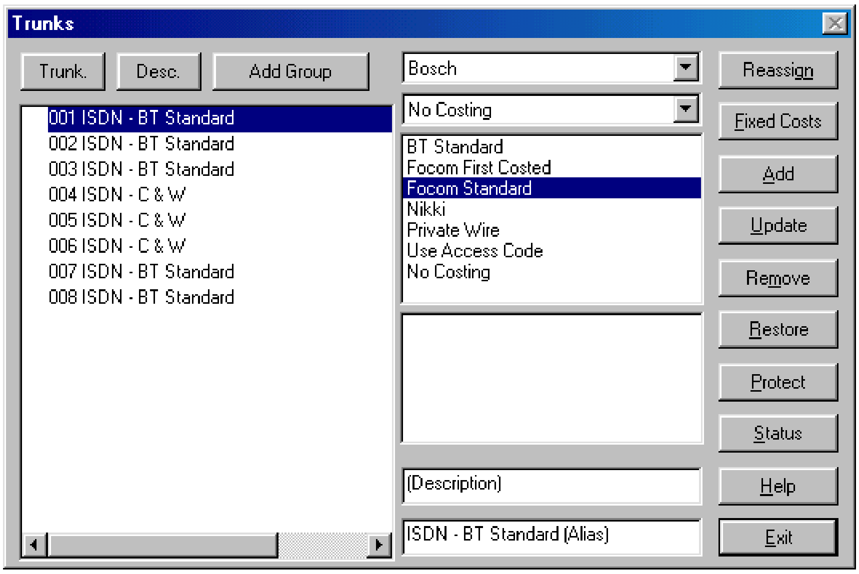
This can be used as a way to create groups, provided that LUMBERJACK has already learned the extensions to go in the groups. The PBX file is a .CSV file that shows the group name and the extensions to be included in the group.




Select the .csv file and click [Open], then click [OK] on the next window - File sent for import


For information on how to set up a PBX file call the **focom limited** Help Desk

## TRUNKS




LUMBERJACK is auto-learning and once the system has been in use for a few days, most of the trunk/PW information will appear in the list on the left hand side. Select the relevant switch in the top middle box; highlight the various trunk groups, e.g. 001001 to 001030, and type what they are (e.g. BT ISDN) in the description box. This description will appear as the trunk name when running reports. Click on [Update].

**[FIXED COSTS]:** For a full explanation on setting up Fixed Costs, please see the System Management Section**.**

**[ADD]:** Although the system is auto-learning, the trunk needs to be in use before it can be recorded here. If trunks/PWs are not used, which may be the case for emergency traffic overflow lines; they can be added manually by clicking on [Add] and inserting the Trunk ID as the Item. To insert a range of trunks say Group 5 trunks 0 to 10, type in *005000 to 005010*. The range will be added to the list in numerical order. Alternatively, force the switch to make calls over all lines so that they are learned automatically.

**COSTING STYLE**: The default costing style for all outgoing trunks is set up under PBX>Cost Style, page 123. You can override this here by setting a costing style for an individual line. This is also where you set up incoming call costing.

In the centre column, select the appropriate PBX from the top box.

The second box refers to incoming call costs. These calls can be costed if the CLI is given. Highlight the incoming lines and select the appropriate carrier from this box. Then click on [Update]. Calls will be charged as would an outgoing call to that destination. If incoming calls are not costed, leave this box set at ‘No I/C Costs’.

The third box refers to outgoing lines and shows the tariffs installed on your system. If you want to change the default cost style, highlight the trunks, select the appropriate tariff from the list and [Update] the entry.

**[REMOVE]:** If a comms link is ceased, the line or group of lines can be highlighted and marked for Removal. If a line is marked for deletion it can be [Restore]d before clicking on [EXIT]. Once you Exit the line(s) will be removed from the list. Remember to recache the system. (See Note below).

Once a line has been deleted, you will still be able to run reports on it if it was included in a Group that is still on the system. Historic reports can, therefore, be run. Once these Groups are deleted, or the line Removed from the Group, the information will no longer be accessible.

If a line is removed in error contact the Help Desk who will be able to recover it. It will be self-learned as soon as it is used again, however, the description and costing details and any relevant Groups or Filters will have to be re-instated. Data will not be lost if a trunk is accidentally removed. However, it can only be accessed if the trunk were included in a Group, as described above, as the system will continue to log to a removed line until the system has been recached.

Adding the trunk name manually will still require a Recache. (See Note below).

**UPDATING**: [Reassign] and [Update] have two distinct functions. Reassigning lines allows you to retain the historical information against the days stored data, i.e. the system will record the actual date that the lines changed information and, when running reports, will show a total to the date of the change and a total for data thereafter. If you are simply changing the description and want this to reflect on all historical data, use [Update].

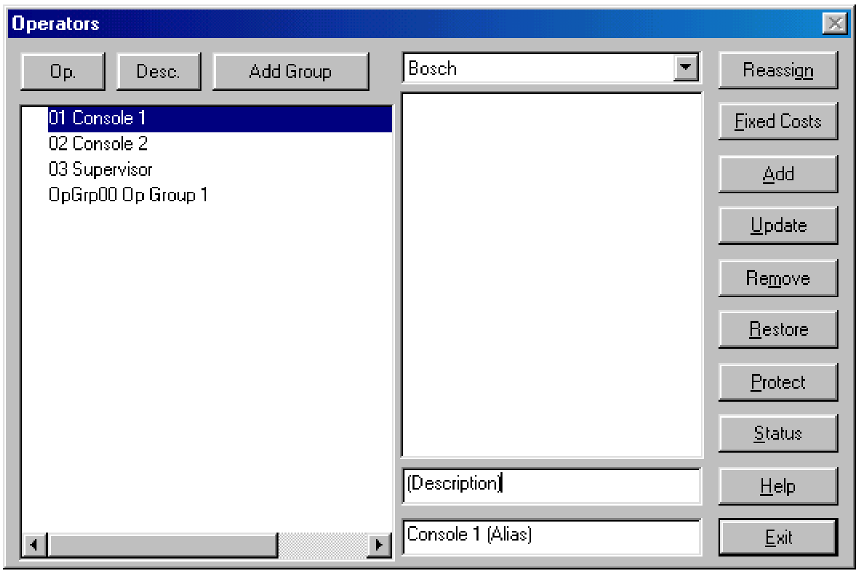
**REASSIGNING**: See explanation under [Reassign] page 121 of this section.

**DESCRIPTION**: User defined description in up to 31 characters.

**ALIAS**: Main user defined description in up to 31 characters.

**NOTE:** Any change will require the system to be Recached before the change is acknowledged. (See page 97 of this section.)

## OPERATORS




LUMBERJACK is auto-learning and once the system has been in use for a few days, the Operator information will appear in the list on the left hand side. Where Operator group information is delivered by the switch, this will appear as Op Grp with the number. Select the relevant switch in the top middle box; highlight the Operator and type the name in the description box. Click on [Update].

**[FIXED COSTS]:** For a full explanation on setting up Fixed Costs, see the System Management Section.

**[REMOVE]:** If an Operator is ceased, the console can be highlighted and marked for Removal. If a console is marked for deletion it can be Restored before clicking on [EXIT]. Once you Exit the console will be removed from the list. Remember to recache the system. (See Note below)

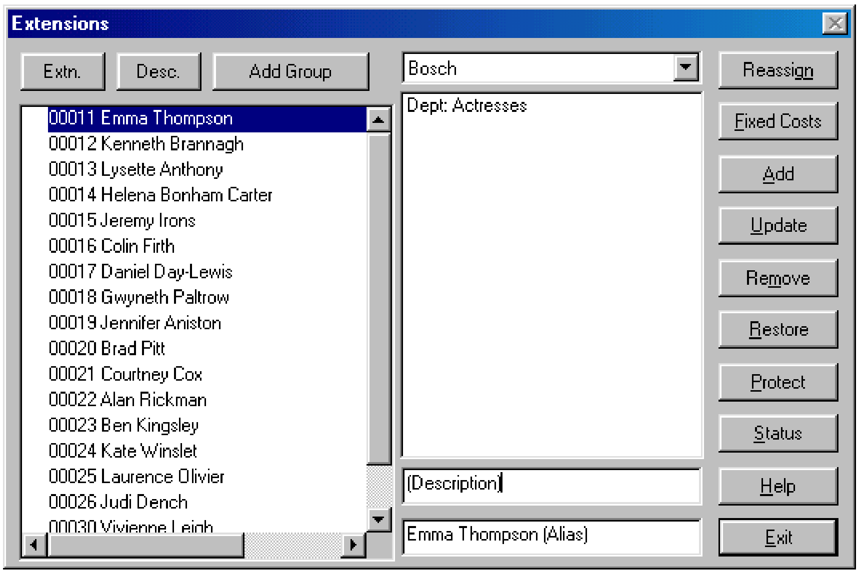
Once an Operator has been deleted, you will still be able to run reports on it if it was included in a Group that is still on the system. Historic reports can, therefore, be run. Once these Groups are deleted, the information will no longer be accessible.

**UPDATING:** [Reassign] and [Update] have two distinct functions. Reassigning lines allows you to retain the historical information against the days stored data, i.e. the system will record the actual date that the Operator changed information and, when running reports, will show a total to the date of the change and a total for data thereafter. If you are simply changing the description and want this to reflect on all historical data, use [Update].

**REASSIGNING:** See explanation under [Reassign] page 121 of this section.

**NOTE:** Any change will require the system to be Recached before the change is acknowledged. (see page 97 of this section.)

## EXTENSIONS




Lumberjack is auto-learning and once the system has been in use for a few days, most of the extension information will appear in the list on the left hand side. Select the relevant switch in the top middle box; highlight the extension and type in the name of the user in the description box. Click on [Update]. It is possible to [Add] the extension numbers manually; in cases where an extension has very little use this may be helpful. Alternatively, this information can be imported from a .CSV file. (See Scheduler, page 93 of this section).

Sorting: The list of extensions can be viewed either in [Extension] Number order or in [Description] order by clicking on either of the two boxes above the list. If the Description is the name of the extension user, it may be beneficial to enter the surname first.

[Fixed Costs]: For a full explanation on setting up Fixed Costs, please see page 144 of the System Management section.

[Remove]: If an extension is ceased, the extension or group of extensions can be highlighted and marked for Removal. If an extension is marked for deletion it can be Restored before clicking on [EXIT]. Once you Exit the extension(s) will be removed from the list. Remember to recache the system. (See Note below).

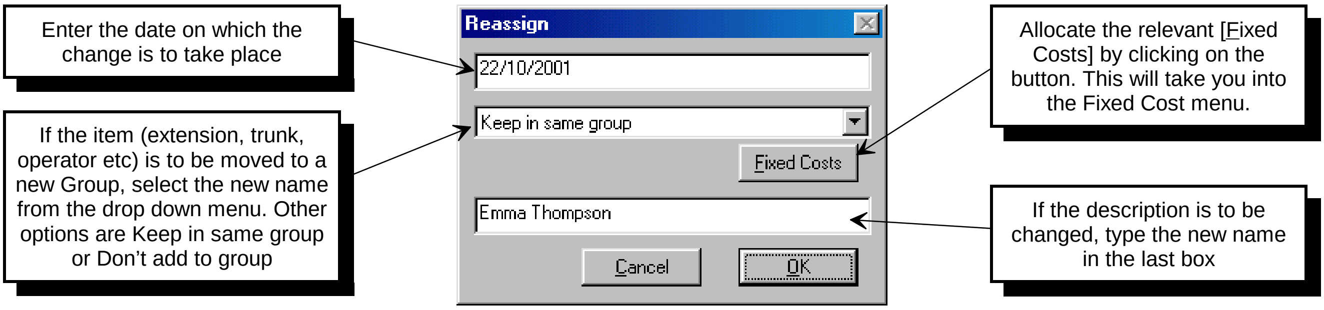
Once an extension has been deleted, you will still be able to run reports on it, if it was included in a Group that is still on the system. Historic reports can, therefore, be run. Once these Groups are deleted, the information will no longer be accessible.

Updating: [Reassign] and [Update] have two distinct functions. Reassigning allows you to retain the historical information against the days stored data, i.e. the system will record the actual date that the extensions changed information and, when running reports, will show a total to the date of the change and a total for data thereafter. If you are simply changing the description and want this to reflect on all historical data, use [Update].

**NOTE:** Any change will require the system to be Reached before the change is acknowledged. (see page 97 of this section.)

### REASSIGN

Reassign gives you the ability to set-up changes in advance, e.g. if you know that a member of staff is moving from one department to another on the 15th of the month, you do not need to wait until the 15th in order to input the move. Click on [Reassign] and the following screen appears:

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| **NOTE:** | A Reassign CANNOT be back dated. If you want the change to become effective from the moment of entry, type in *Now* and run a Recache of the system. (see page 97 of this section) . |

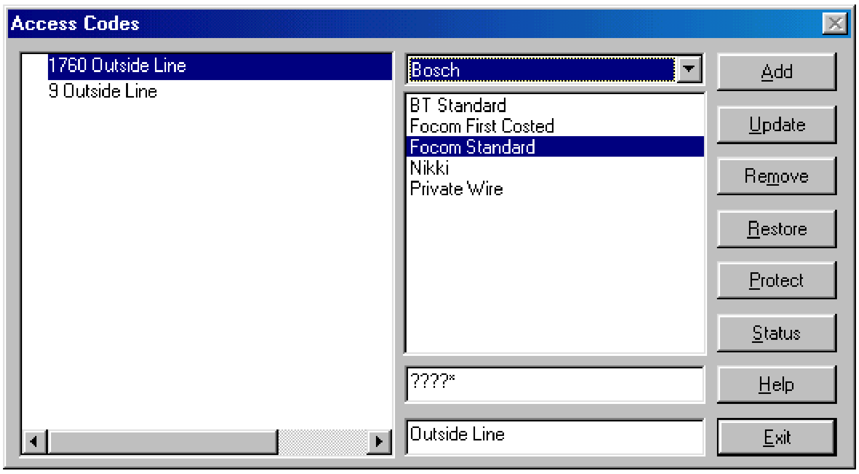
## DNIS

This stands for Direct Network Inward Service. The DNIS is the actual number that a caller has dialled to reach an extension. If your switch outputs the DNIS, LUMBERJACK will automatically learn it (not all switches output the DNIS). For example, you may have a hunt group number answered by any one of a given group of extensions, and those extensions may also have DDI numbers. If you run a report on the extensions within the hunt group you may want to know how many incoming calls were answered as a result of the hunt group number being dialled, and how many calls went directly to that extension. By putting a DNIS field in your report you would see the actual number that had been dialled.

### AGENTS AND DESKS

Agents and Desks are relevant to some ACD systems and dealerboards used by the financial sector. The Agent and Desk numbers are learnt in the same manner as Extensions and they may be grouped and used in reports in exactly the same way.

## ACCESS CODE




The Access Codes will be set-up when the system is installed. ANY CHANGE TO THESE CODES COULD PREVENT ACCURATE LOGGING AND COSTING OF DATA**.** They should only be changed if your switch maintainer has modified the system. If uncertain, call the Help Desk.

If a new tariff has been installed, it will need to be set-up under Cost Styles, page123 before it will be available on this screen.

**[REMOVE]:** Click on a code in the list and then click on [Remove]. [Restore] will remove the deletion before clicking on [Exit].

**[ADD]:** To create a new access code, click on [Add] and enter the number. It will appear at the bottom of the list. Then change the Description and select the tariff from the list. Click on [Update] to amend the addition. When you [Exit] the entry will appear in numerical order.

**DIGIT STRIP:** Some switches do not have consistent Access Codes (e.g. Mitel's SX2000 may be set to show access codes only on certain routes). In these cases it is necessary to instruct the system when to strip off the Access Code numbers from the front of the dialled digits and when to ignore them. For example, the switch may use the Access Code 2345 to indicate that a specific route has been selected. However, if you were to set 2345 as a permanent Access Code, it would be stripped off all dialled digits including those that were a valid telephone number, such as, 2345678. This would leave 678 as a dialled number which would make no sense in the reports. To avoid this, tell the system not to strip off 2345 unless there are at least six digits left after stripping by inserting *??????* in this box. (Each question mark represents a digit). If this is not required, leave this box blank.

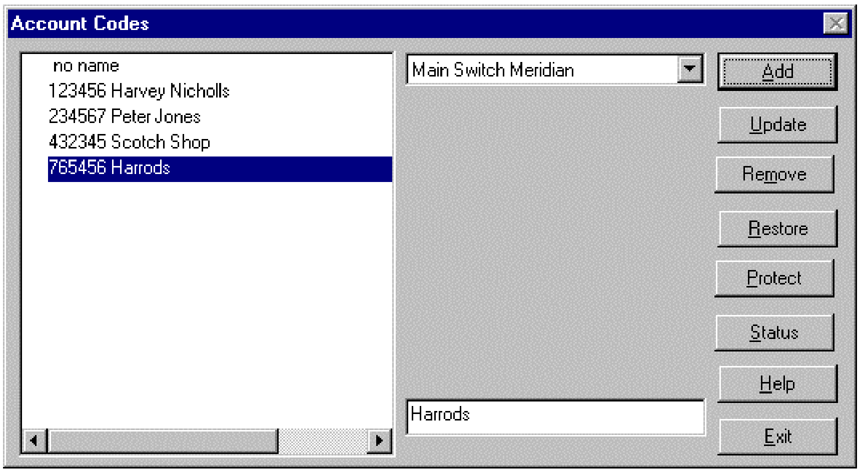
It is also possible to specify the exact format prior to stripping digits, e.g. ???X will tell the system that it should strip the access code only if it is followed by three numbers. The ! is also accepted as a wild card which represents 1 through 9, or *, or # (but not 0).

Where least cost routing is enabled, calls often breakout at remote sites. For example, if you have an American office, calls may be cheaper if routed via your tie line to USA before breaking out on to the US carrier. The switch will output these calls with the access code to US followed by the local number from the remote office. In order to cost this against the UK tariff, you will need to substitute the international area code for the access code, e.g. 15062345678. In this case the access code 1506 took the call to the New York office where the call to 234 5678 broke out. In this case you will need two references for access code 1506:

1506 with ????X should be set to Private Wire. (The ? represent the number of digits in the US site's extension numbers.)

1506 with ???????+001212. This will represent the seven digits for the local New York number and it will add the area code to the front of the number in order that the call will be costed according to your UK tariff. It would, of course, be possible to incorporate the New York tariff into the system in order to correctly cost the calls, however, most UK companies prefer to use the UK tariff as this helps recoup some of the cost of the private wire.

## Account Codes




Account Codes are not always used. They are particularly useful for companies who act on behalf of others, such as solicitors, who charge their time back to the customer. Account Codes are a string of numbers relevant to a particular client and they will be set up by the PBX Manager. Before making any call, this account code is keyed in followed by the dialled number. A report can then be run on LUMBERJACK to see the number and cost of calls made on behalf of a particular client.

LUMBERJACK auto-learns the Account Codes as they are used.

To set up manually:

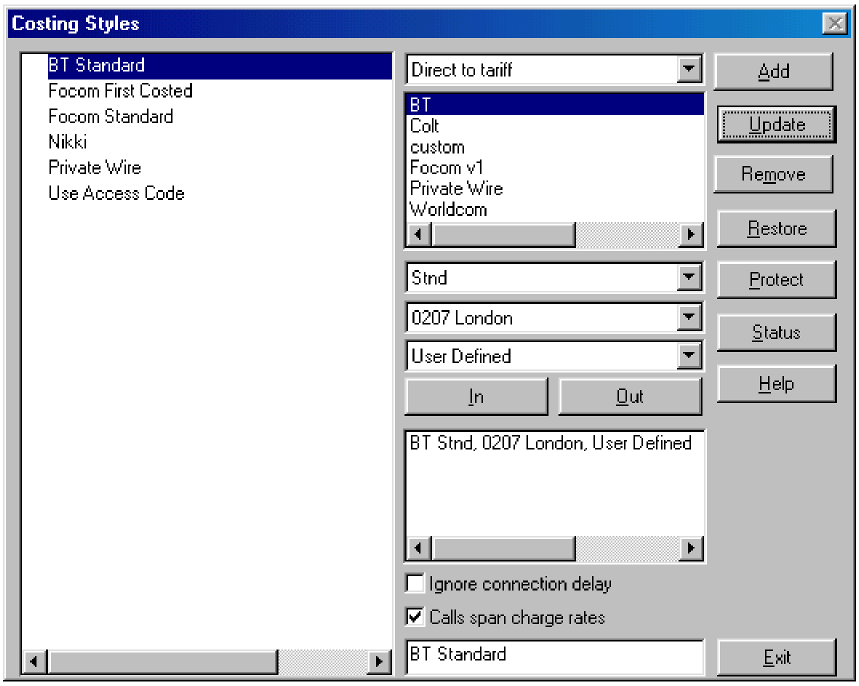
Select the relevant PBX.

Type in the name of the client as the description, and click on Add. Insert the account code number under Enter Items.

Click on OK.

| | |
|---|---|
| **Note**: | Remember to Recache the system before the update is acknowledged. (Page 97) |

## Cost Style




In order to cost a call, the system looks first at the Trunk. The Trunk will be set up with the costing style appropriate for that trunk group. (See end of this section)

The list on the left hand side shows the Styles that have been set up already. When a tariff is added to the system it needs to be allocated a Costing Style. This list is also referenced when using the recalculate option within the report set-up:

**Cost Style:** There are various options:

**Direct to Tariff** — This Style points the trunks directly to the relevant tariff. The tariff will be highlighted. The three boxes below will show any discount rate (or Standard), the local area codes, and User Defined (See Tariff for details, Page 111).

**First Costable** — Where an incomplete tariff has been submitted from the provider, this set-up will allow the system to use another designated tariff where no cost has been given. This should be regarded as an interim measure until the provider supplies the full tariff.

**Greatest Cost Routing** — This Style allows the users to make comparisons between any tariff on their system. Select all the tariffs, or just those against which you want to make a comparison. Any report run using this comparative option will show the highest cost from any of the tariffs

**Least Cost Routing** — As per Greatest Cost Routing. In this case a report would show the lowest cost from any of the providers.

**Meter Pulse Tariff** — Metered Pulses are given by some PTTs (no longer an option in the UK). This is where a price per pulse is agreed but the number of pulses varies according to the time of day (Peak, Standard, Cheap Rates).

**Use Access Code Style** — No tariff is selected with this option and the boxes below are ignored. When a trunk is pointed to this Style, the system checks the Access Code in order to cost the call. In this case the Access Codes will be pointed to the tariff to be used.

**Use Cost Supplied By Switch** — This is relevant in cases where a telephone account is being logged and where the customer wishes to log the actual cost charged.

**Tariff:** This box is used with the Direct to Tariff Cost Style. All tariff loaded on to the system will be shown in this box. Select the tariff. Then select the discount rate, the local codes and user defined from the boxes below. Click on [In]. The selection will appear in the box below.

**DESCRIPTION:** Give the tariff entry a name (not more than 31 characters) and click on Add. The entry will appear in the list on the left hand side.

**How The System Costs A Call**

1. It looks for the trunk used for the outgoing call.
2. If the trunk is pointing to a Cost Style that has been set up to go direct to tariff; the call will be costed as per the tariff.
3. If the Cost Style is Use Access Code, the call will be costed as per the access code table information.

## FIXED COSTS

For a full explanation of setting up the Fixed Costs Module, see the System Management Section page144.