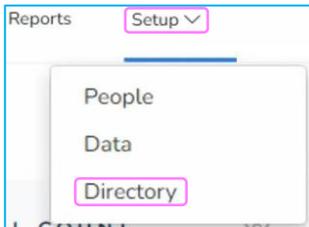




The Directory contains a list of users and numbers which also displays their organisational attributes.

Access the Directory

To access the Directory, click 'Setup' > 'Directory'



View a user

Click on a number or user to view the attributes associated.

Number	Subscriber Numbers	Name	Type	Location	Department	Office Location	Branch	Cost Center
A.Evans@soft-ex.net	BMS: 00353124 00353124 A.Evans@ Ribbon SBC: 00353124	Andrew Evans	Subscriber	United Kingdom	Sales	UK		

Some fields are locked and cannot be changed as the information is sourced from a data feed e.g. Active Directory.

Additional attributes can be manually assigned, click in the field and capture the attribute.

Edit ✕

Number

Subscriber Type

Subscriber Numbers

Data Source	Number	
BMS	00353124	✕
Microsoft Teams	A.Evans@	✕
Microsoft Teams	00353124	✕
Ribbon SBC	00353124	✕

Name

Location

Department

Create a new organisation Level

Click 'Organisation Levels' > 'Configure Organisation Levels'

Here you can create a new Level and apply them to reports. Up to 10 Organisation levels can be configured on the system.

- click **ADD NEW LEVEL**, name the Level and click **SAVE**.

The screenshot shows the 'Configure Organisation Levels' dialog box. It has a title bar with 'SOFT-EX' and a close button. Below the title bar, there's a breadcrumb 'Setup / Organisation Levels' and a dropdown menu with 'Organisation Levels' selected and 'Configure Organisation Levels' highlighted. The main area contains a text input field for the level name, a 'Properties' section with checkboxes for 'Visible' and 'Default', and a 'Field2 (...)' dropdown. A 'SAVE' button is at the bottom right. The background shows the 'Organisation Levels' menu with 'Configure Organisation Levels' highlighted.

Download, modify and upload a directory

You can download the directory to an Excel file, modify it and then upload it to the platform. Note, certain fields are locked and cannot be modified.

All columns contain a sort and filter option allowing you to sort and filter data in each column.

The screenshot shows the 'Organisation Levels' table. The table has columns: Number, Subscriber Numbers, Name, Type, Location, Department, Office Location, Branch, and Cost Center. The 'Location' column has a filter dropdown open, showing 'Contains' and a text input field. 'FILTER' and 'CLEAR' buttons are at the bottom of the filter dropdown. 'UPLOAD' and 'DOWNLOAD' buttons are at the top right.

Learn more

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