



# CAAB OPERATOR DIRECTORY

## User Guide

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*Version 2.1*

**Microsoft**® Partner  
Gold Independent Software Vendor (ISV)  
Gold Business Intelligence

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## 1 INTRODUCTION

CAAB XL Operator Directory is a Module which interfaces directly with the CAAB XL staff database. It gives the operator all of the information they need to run an efficient reception system.

The operator will have access to all directory data entered by the database manager through CAAB XL. They will be able to maintain the database in an up-to-the-minute form. Records may not be deleted.

CAAB XL's Operator Directory Module is fully networked, which means directory records can be updated from any PC on the network. The "sharable" database allows for multiple operator access.

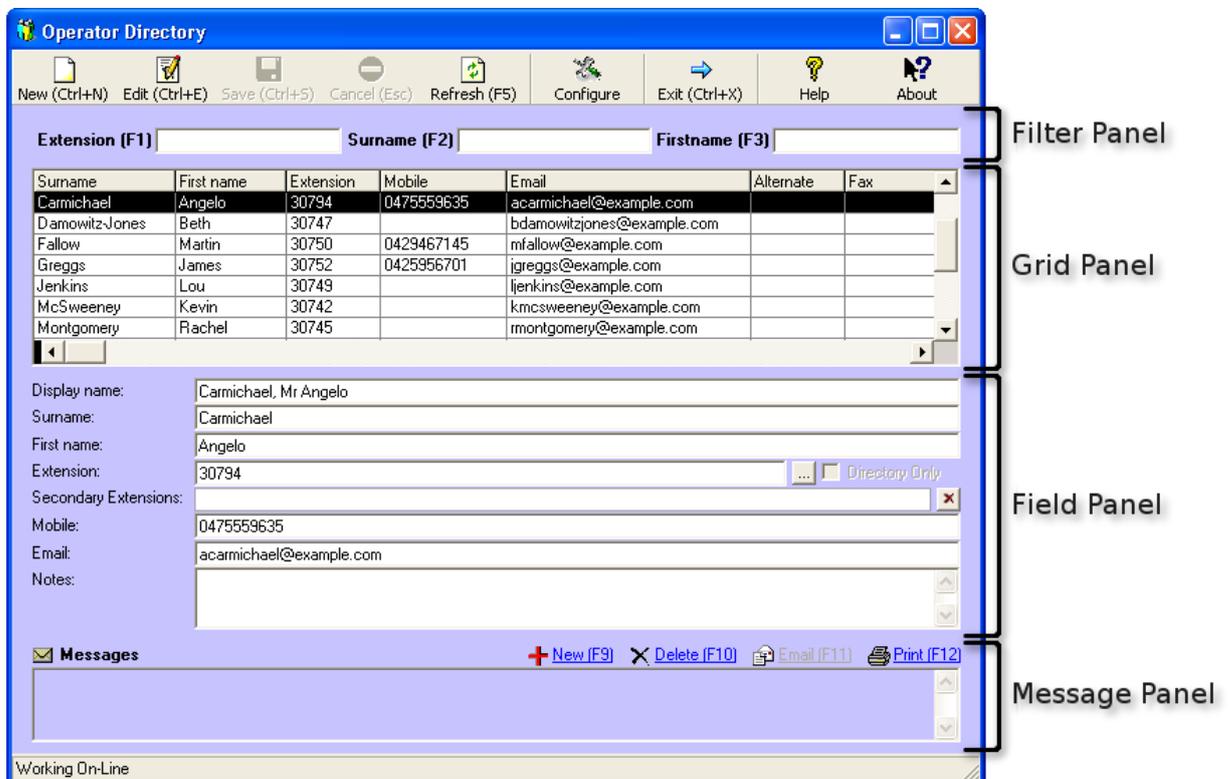
The Operator Directory is fully configurable to suit each operator's needs. Configuration options include screen layout and colours, font style and colour and keyboard shortcut assignments.

Messages can be taken by the operator and emailed to or printed for staff directly from within the software.

Each copy of the Directory Module keeps a local cache of the directory data to minimise database lookups and increase performance. This cache is automatically used as a fallback data source in the event of a network or server failure.

## 2 SCREEN LAYOUT

The CAAB XL Operator Directory screen is made up of four distinct sections.



The screenshot shows the 'Operator Directory' application window. It features a menu bar with options like New, Edit, Save, Cancel, Refresh, Configure, Exit, Help, and About. Below the menu is a filter panel with input fields for Surname (F2), Firstname (F3), and Extension (F1). The main area contains a grid of staff records. Below the grid is a field panel for detailed information of the selected record. At the bottom, there is a message panel with buttons for New, Delete, Email, and Print. A status bar at the very bottom indicates 'Working On-Line'.

Surname	First name	Extension	Mobile	Email	Alternate	Fax
Carmichael	Angelo	30794	0475559635	acarmichael@example.com		
Damowitz-Jones	Beth	30747		bdamowitzjones@example.com		
Fallow	Martin	30750	0429467145	mfallow@example.com		
Greggs	James	30752	0425956701	jgreggs@example.com		
Jenkins	Lou	30749		ljenkins@example.com		
McSweeney	Kevin	30742		kmcsweeney@example.com		
Montgomery	Rachel	30745		rmontgomery@example.com		

## 2.1 THE FILTER PANEL

This area allows the operator to select the records they wish to see. By selecting the field to filter on, using the Function or Control key assigned to it, the operator can type in the data to be applied. The search function is dynamic, meaning the filter is applied as each key is typed, narrowing the range of displayed records as it goes.

The filter function can be applied to multiple fields. In the example below, the operator may have pressed *F2* to search for Surname "Brown", then selected *F3* to narrow the search even further to locate the directory entry in question.

Extension (F1)  Surname (F2)  Firstname (F3)

Operators and Administrators can customise the number and types filter panels to allow filtering on any fields they wish, and can assign their own shortcut Function or Control keys. This is described further in the [Filter Panel Configuration](#) section.

The filter panel allows the operator to search on almost any directory field. These fields include:

- Extension
- Staff Number
- Group
- Mobile number
- Status
- Departments
- First name
- Title
- Description
- Home Phone
- Messages
- Surname
- Location
- Phone
- Alternate numbers
- Notes
- Display name
- Position
- Fax
- Email address
- 5 User defined fields

## 2.2 THE GRID PANEL

Surname	First name	Extension	Mobile	Email	Alternate	Fax
Carmichael	Angelo	30794	0475559635	acarmichael@example.com		
Damowitz-Jones	Beth	30747		bdamowitzjones@example.com		
Fallow	Martin	30750	0429467145	mfallow@example.com		
Greggs	James	30752	0425956701	jgreggs@example.com		
Jenkins	Lou	30749		ljenkins@example.com		
McSweeney	Kevin	30742		kmcsweeney@example.com		
Montgomery	Rachel	30745		rmontgomery@example.com		

The Grid Panel displays data for all the directory entries on your system that match the current filter. The data can be limited to a specific site if required.

The slide bar along the bottom will display all fields in the directory record. The column widths can be adjusted to suite your needs. Hover the mouse over the dividing line until the cursor changes to **↔**. Then click and drag the divider to the required column width.

Further adjustment to the Grid Panel including the column selection and display order is available in the [Grid Panel Configuration](#) module.

## 2.3 THE FIELD PANEL



The Field Panel displays the configurable data for the record. By highlighting a record and clicking on the edit button, the operator can change any of these. The fields shown on the initial screen are the defaults. The Operator or Administrator can create additional Field Panels and select the fields you want to edit in [Field Panel Configuration](#).

## 2.4 THE MESSAGE PANEL



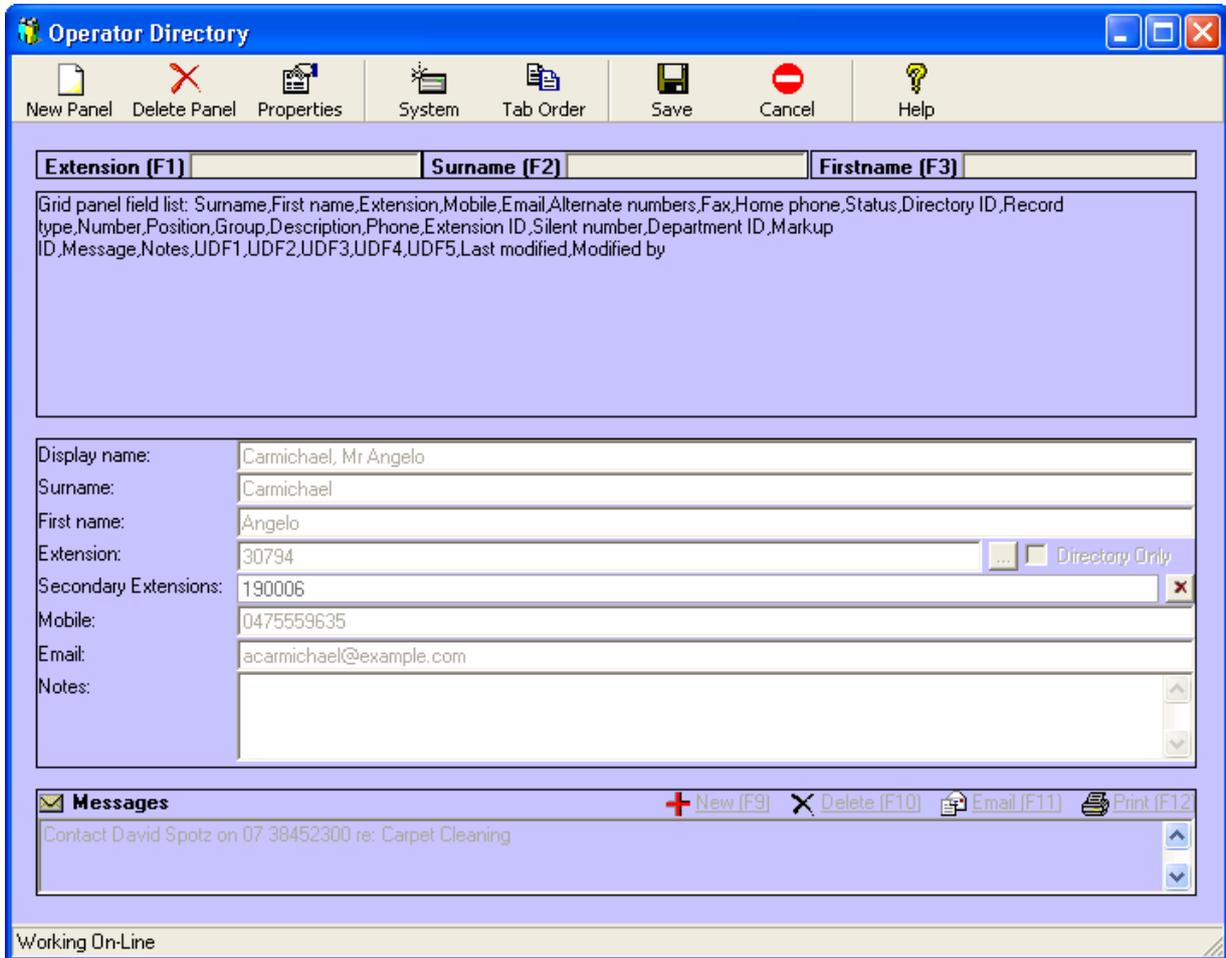
The Message Panel displays the date, time and first line of any messages for this entry. You can add, delete, email and print messages for the record that you have selected. There is no limit to the number of messages you can store against a record.

[Message Panel Configuration](#) can be adjusted in the *Configure* section of the software.

**Note: Selecting Delete will delete all messages in the record's list.**

### 3 CONFIGURING YOUR SCREEN LAYOUT

CAAB XL Operator Directory allows for a great deal of personalisation. By clicking *Configure* at the top of the screen the Operator will be taken into a configuration screen similar to the one below:

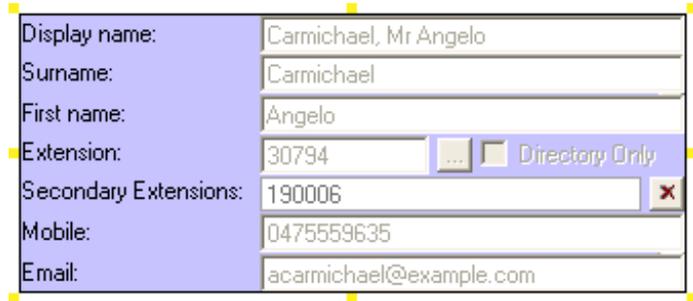


This gives an overview of the Directory screen layout and provides the user with several options, which include:

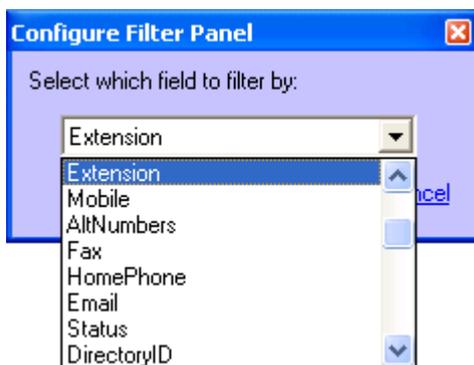
- Create new panels
- Delete panels
- Modify panel properties
- Move panels / Modify screen layout
- Modify Tab Key Order
- Customise field names
- Create keyboard shortcuts
- Customise colours
- Modify system refresh timing
- Allow/Disable record Editing or Adding

### 3.1 MODIFYING EXISTING PANELS

The size and position of any of the panels can be adjusted by clicking on the panel in question. You can then drag and drop the panel into the position you require, or if you want to adjust the size of the panel, click on the yellow "handles" on the side or corner of the box and drag the panel borders to the size required.



Display name:	Carmichael, Mr Angelo
Surname:	Carmichael
First name:	Angelo
Extension:	30794 <input type="checkbox"/> Directory Only
Secondary Extensions:	190006 <input type="button" value="X"/>
Mobile:	0475559635
Email:	acarmichael@example.com



**Configure Filter Panel**

Select which field to filter by:

- Extension
- Extension
- Mobile
- AltNumbers
- Fax
- HomePhone
- Email
- Status
- DirectoryID

#### 3.1.1 Filter Panel Configuration

Doubleclick the Filter panel to adjust the properties. You are presented with the *Configure Filter Panel* popup, which will contain a complete list of the filter fields for your selection. Select the field you wish to filter on.

Initially the filter field will be given a "Fast key" comprising of *CTRL* plus the first letter of the field. So the Fast Key for "Fax" will be *CTRL+F*.

Fast keys can be modified in System Configuration under *Keyboard Short Cuts*.

#### 3.1.2 Message Panel Configuration

Doubleclick this panel to configure the message facility.

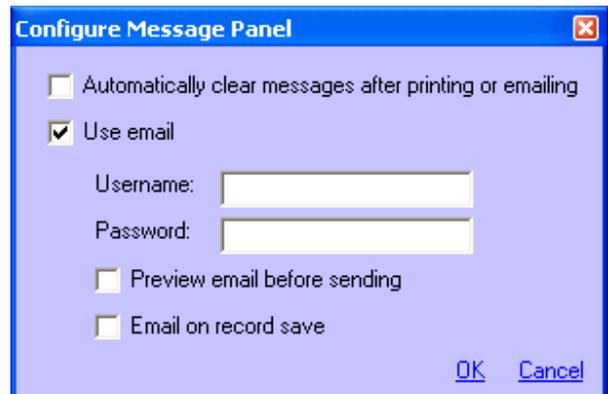
**Automatically clear messages after printing or emailing** will do just that. If this field is not checked, you will need to manually clear older messages to keep your data current.

**Use email** can be used to enable or disable the email function for Operator Directory. The computer in use will need to have access to email facilities.

**Username** and **Password** fields are used if required for email operations.

**Preview email before sending** enables a preview of any email messages before sending.

**Email on record save** sends the email as soon as a message record is saved. If this field is not checked, you will need to manually select the Email function before the message will be sent.



**Configure Message Panel**

Automatically clear messages after printing or emailing

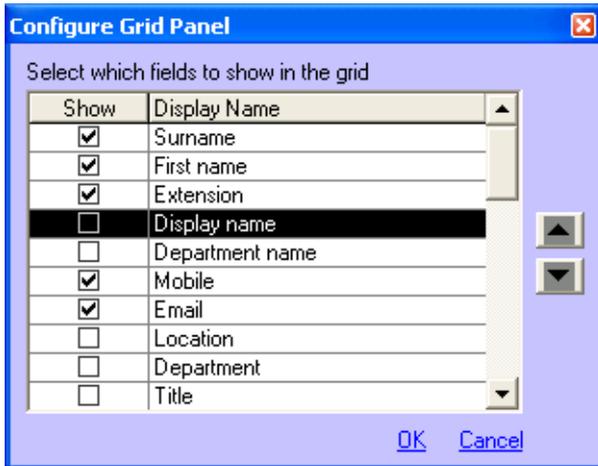
Use email

Username:

Password:

Preview email before sending

Email on record save



### 3.1.3 Grid Panel Configuration

Doubleclick this panel to select the fields to display in the database window. Switch fields on/off by checking on the *Show* checkboxes.

Highlight the field you wish to move and use the Arrow buttons on the right to move the column positions for the available fields.

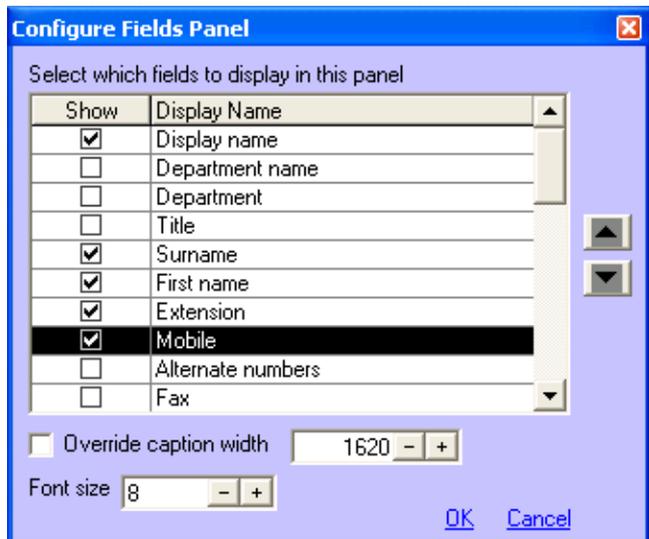
### 3.1.4 Field Panel Configuration

Doubleclick on this panel to select which fields to display and edit.

As with the Grid Panel Configuration, use the *Show* checkboxes and Arrow buttons to the right to modify how fields display.

The *Override Caption Width* checkbox will manually adjust the space used for captions in the Fields Panel in the width box. Otherwise, the width will default to the widest caption used.

The font size can also be adjusted as required.



### 3.2 ADDING A NEW PANEL

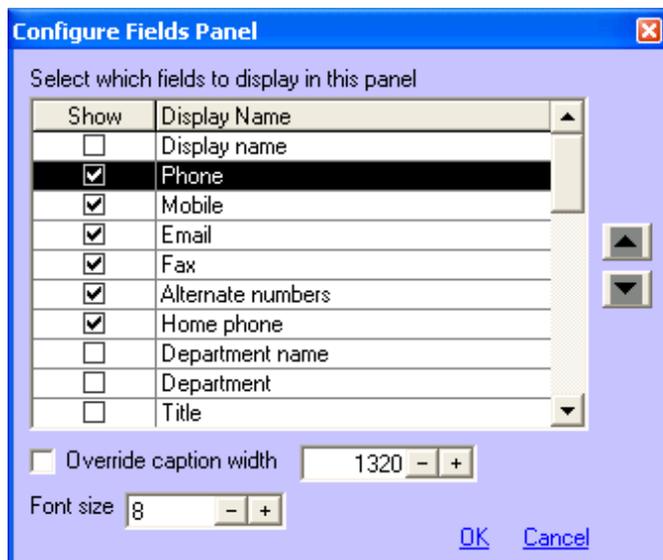
Click *New Panel* in the top right-hand corner of the screen to create additional panels for the directory system.

The only additional panels that can be created are "Fields" and "Filters" panels. Select the type of panel you wish to create and select *Create Panel*.



A new panel with the default entries will be generated. Adjust the position and size to suit and doubleclick on it to invoke the panel configuration screen. Select the fields you wish to display and save the configuration. The final layout should match your requirements but, if not, go back into configuration and fine-tune it.

An example of a second "Field Panel" and how it affects the layout is shown below:



The result of adding the panel above is now the screen will display two "Field panels" side by side that contain different data.

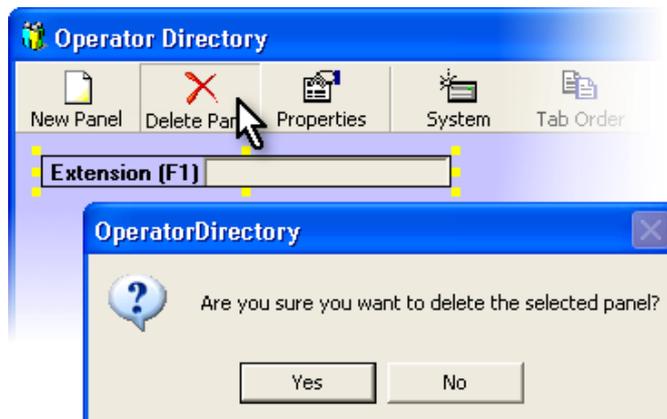


### 3.3 DELETING A PANEL

The Configuration screen gives the operator the ability to remove panels from the screen configuration.

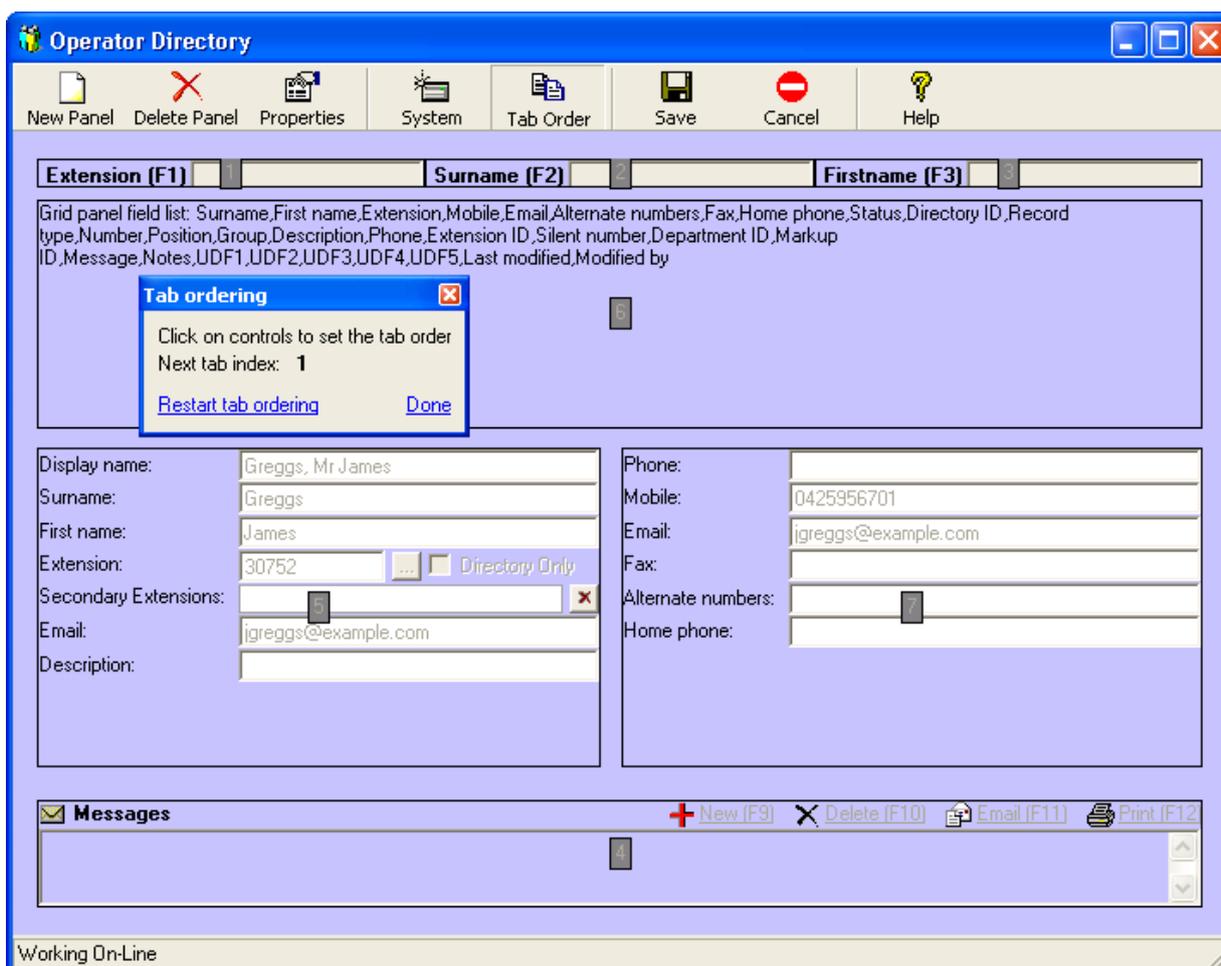
There are only two panel types that can be deleted: The Filter Panels and Field Panels.

Select a panel and click *Delete Panel*. The system prompts before removing the selection.



### 3.4 SETTING THE TAB ORDER

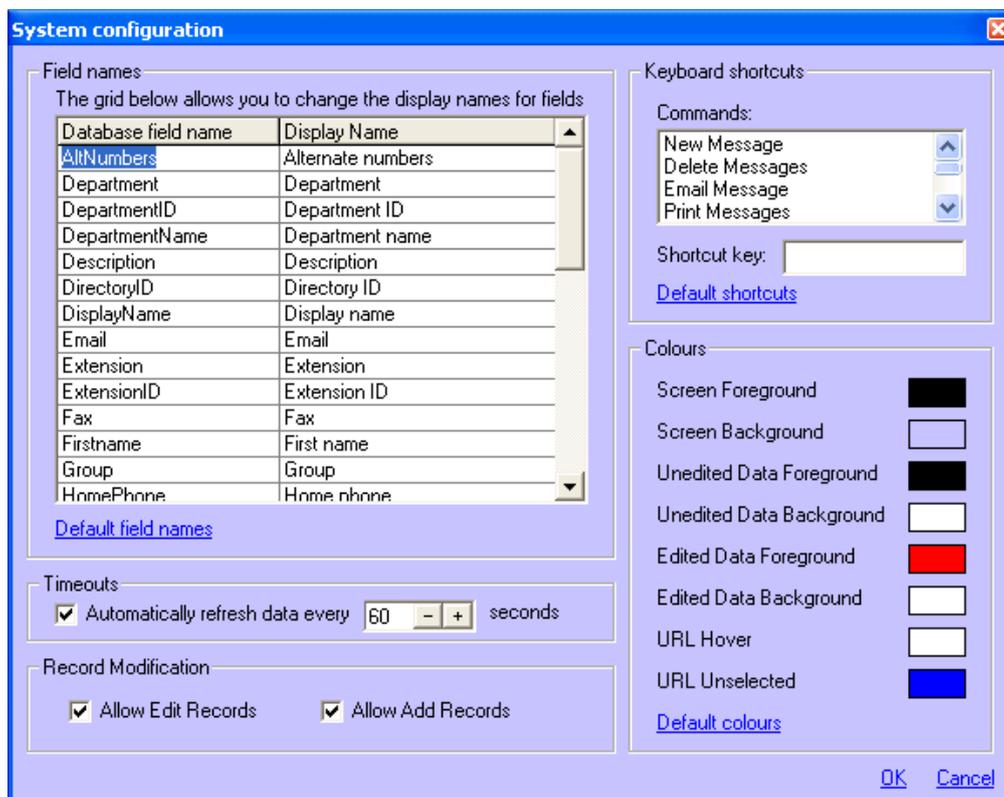
To adjust panel order that *tabbing* through the application will follow, click *Tab Order*.



By clicking on the panel you wish to TAB to first, you assign index 1 to it. Click on the next panel for index 2, and so on. Click *Restart Tab Ordering* to begin again. Click *Done* when finished.

## 3.5 SYSTEM CONFIGURATION

By selecting the *System* button the following screen is displayed:



**System configuration**

**Field names**  
The grid below allows you to change the display names for fields

Database field name	Display Name
AltNumbers	Alternate numbers
Department	Department
DepartmentID	Department ID
DepartmentName	Department name
Description	Description
DirectoryID	Directory ID
DisplayName	Display name
Email	Email
Extension	Extension
ExtensionID	Extension ID
Fax	Fax
Firstname	First name
Group	Group
HomePhone	Home phone

[Default field names](#)

**Keyboard shortcuts**

Commands:

- New Message
- Delete Messages
- Email Message
- Print Messages

Shortcut key:

[Default shortcuts](#)

**Colours**

- Screen Foreground:
- Screen Background:
- Unedited Data Foreground:
- Unedited Data Background:
- Edited Data Foreground:
- Edited Data Background:
- URL Hover:
- URL Unselected:

[Default colours](#)

Timeouts  
 Automatically refresh data every  seconds

Record Modification  
 Allow Edit Records     Allow Add Records

OK Cancel

System Configuration allows the user to make a variety of adjustments to the way the system treats and displays the data. This area allows for a great deal of customisation of the system. The areas that can be changed are as follows:

### 3.5.1 Field Names

In this area there are two columns. The first contains the database names of all of the fields in the directory. The second column contains the current Display Name for each field. The Display Names may be changed to suit the user's needs.

Each workstation can be customised individually.

### 3.5.2 Timeouts

The Directory system can be shared with a number of operators at any given time. This means that the data on display can be constantly changing from a variety of sources. It is important, therefore that changes made to the database are reflected accurately on each directory operator's screen.

The **refresh** function refocuses the data displayed in your current window to take into account changes made. The default period for this is 60 seconds. The tick box will switch on/off this function.

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### 3.5.3 Record Modification

Enable or disable ability to Add and Edit records.

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### 3.5.4 Keyboard Shortcuts

Each function available in the Directory system is tied to a keyboard function key. *Keyboard Shortcuts* can be customised here. Select the function from the list, the current Shortcut key is displayed. To change it simply select the function key, Shift, Alt or Control key to be applied. Combinations of the Alt, Shift, and Control keys can be used.

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### 3.5.5 Colours

The screen display areas listed in this function are fully configurable. Doubleclick a screen section to change its colour.