



# Administrator Guide

The screenshot displays the XACT VIEW administrator interface with several panels:

- Local Extensions (Schmooze):** Shows Dick Johnson <7007> with a status of [Available].
- Remote Extensions (Schmooze):** A search bar and a grid of extensions including Dick Johnson <7007>, Fred Sampson <7002>, Lori Gilson <7005>, Bill Hamerson <5003>, Scott Williams <7006>, Sam Korth <7008>, Russ Smith <4001>, Rick Simons <7004>, Paul Otter <4013>, Mark Nadler <7009>, Larry Muller <9000>, Karen Ludwig <4009>, Kelly Long <5000>, Charles King <4005>, Carol Kohl <4002>, Ken Jone <7102>, Doug Hoesly <7000>, Brian Friebel <5001>, Mary Le Roy <4006>, and Curt Ducat <7001>. Each entry includes a status of [Available] and icons for call, message, and presence.
- Call History (Schmooze):** A table with columns for Name, Number, Extension, and Date/Time. It shows incoming calls from unknown numbers (7005, 7001, 4008) to extension 4008.
- Conference Rooms (Schm):** Lists SC-Conf Bridge and ICG-Conf Bridge, both with 0 users.
- Parked Calls (Schmooze):** A table with columns for Lot, CID, Parked By, Note, and Duration.
- Held Calls (Schmooze):** A table with columns for CID, Note, and Duration.
- Queues (Schmo):** Shows a Sales queue.

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## What is XactView?

XactView is a desktop application that allows you to interact with your phone system. With a click of your mouse, you have complete control over all your phone calls. You have the ability to see which coworkers are on the phone and who they are speaking with. Need to transfer a call? Simply drag the caller to a different extension tab and the call is transferred.

If you are in a call center environment, you now have complete control of your call queuing system. You can see each caller in the queue and how long they have been holding. You can also interactively login to different queues to accept calls.

Company managers have complete access to all calls in their organization. With capabilities such as call barging, call monitoring, and recording live calls, managers have more tools than ever to improve customer service and company communication.

XactView allows you to easily see who is in the office and who is out to lunch or on vacation. Individual users set their presence and other people in the organization can see where they are. This information also links with the presence management of the phone and the Magic Button, allowing you to use a variety of applications to set and retrieve information about where a particular user is.

# ADMIN OVERVIEW

XactView has an admin panel section that any user can log in with the admin username and password. Inside the admin section there are only a few things that you need to be concerned with.

## Extension Buttons

- By default all buttons are enabled. You can completely remove buttons such as Call Recording so no one will see the Call Recording button.



## Permission Settings

**Default Global Permissions-** Default Permissions that all users have.

**Permissions Groups-** You can also create groups of users and set permissions on a group. All permissions set in the group will override any permissions from the Default Global Permissions in the event of a permissions conflict between the two.

**Profile Permissions-** You can also set or change permissions on a per user/profile basis. All changes in permissions on an extension will override any Global or Permission Groups.

## View Everyone Tab

- By default every user can see the Everyone Extension list which will display all extensions in XactView. This can be unchecked and the user would only get the Extension Directories they are allowed to see.

Directory:

## Barge Mode

- You can pick between a ZAP Barge or Chan Spy

**ZAP Barge-** When you un-mute yourself in a barge both parties will hear you speak

**Chan Spy-** When you un-mute yourself in a barge only the person you barged in on will hear you speak so it behaves more like a one sided whisper or coaching of your agents.

## Color Blocks

- Each type of call state such as queue and internal/external calls can have a different color block associated with it in the extension tab. These can be changed on a per user basis.

## Queue Alerts

- You can setup alerts to be notified on a per queue basis for numerous different actions and thresholds such as change the color of the queue if 5 callers waiting in queue are exceeded.

## Bringing up the XactView Admin Section

To manage and change admin settings you will need to know the admin user name and password for the XactView Server. By default this is set to a username of admin and the password of secret. To verify what your admin user name and password is log into your PBX Admin GUI and click on the XactView Module. You will see a screen like this:

### XactView

Server

---

Status: Up  
Version: XactView v2.2.0 rev 2227  
Reload Server:

License

---

Licensed To: Free License  
Trial Days:  
Clients: 1  
Queues: 0  
Activate:

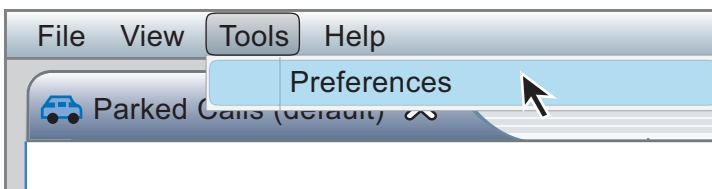
Server Settings

---

Admin User Name:   
Admin Password:

From here you can view or change the admin user name and password. We will see in our example the admin username is admin and the password is secret.

Next open the XactView Client on your computer. To setup the admin connection, click on Tools at the top and then preferences:



Next click on the Administration Login option on the left side. Then set the following fields so your client can connect to the administration section of XactView:

**Host** - This is the FQDN name or IP address of your XactView server which is normally the PBX IP Address.

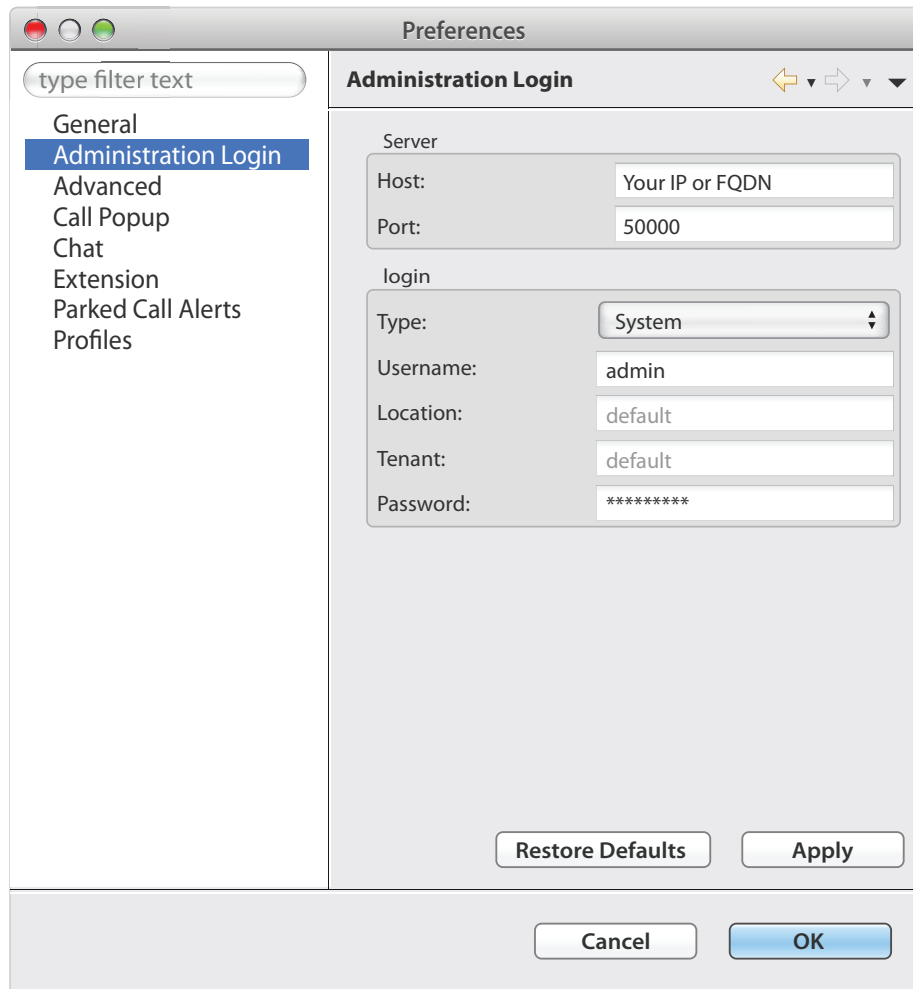
**Port** - Leave this set to 50000

**Type** - Leave this set to System

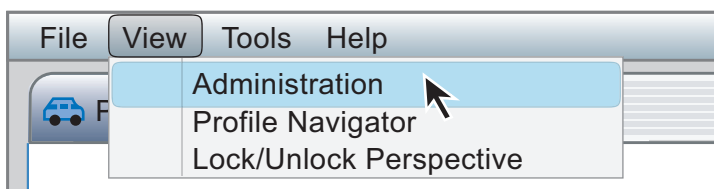
**Username** - This is the username that you set earlier in the XactView Module of your PBX.

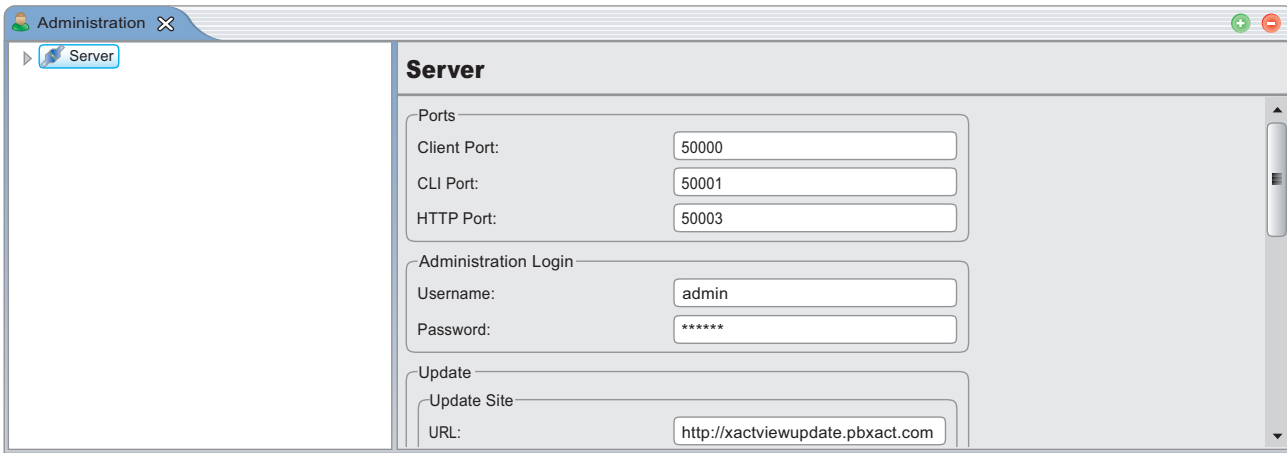
**Password** - This is the password you set earlier in the XactView Module of your PBX

Press the Ok button when done.



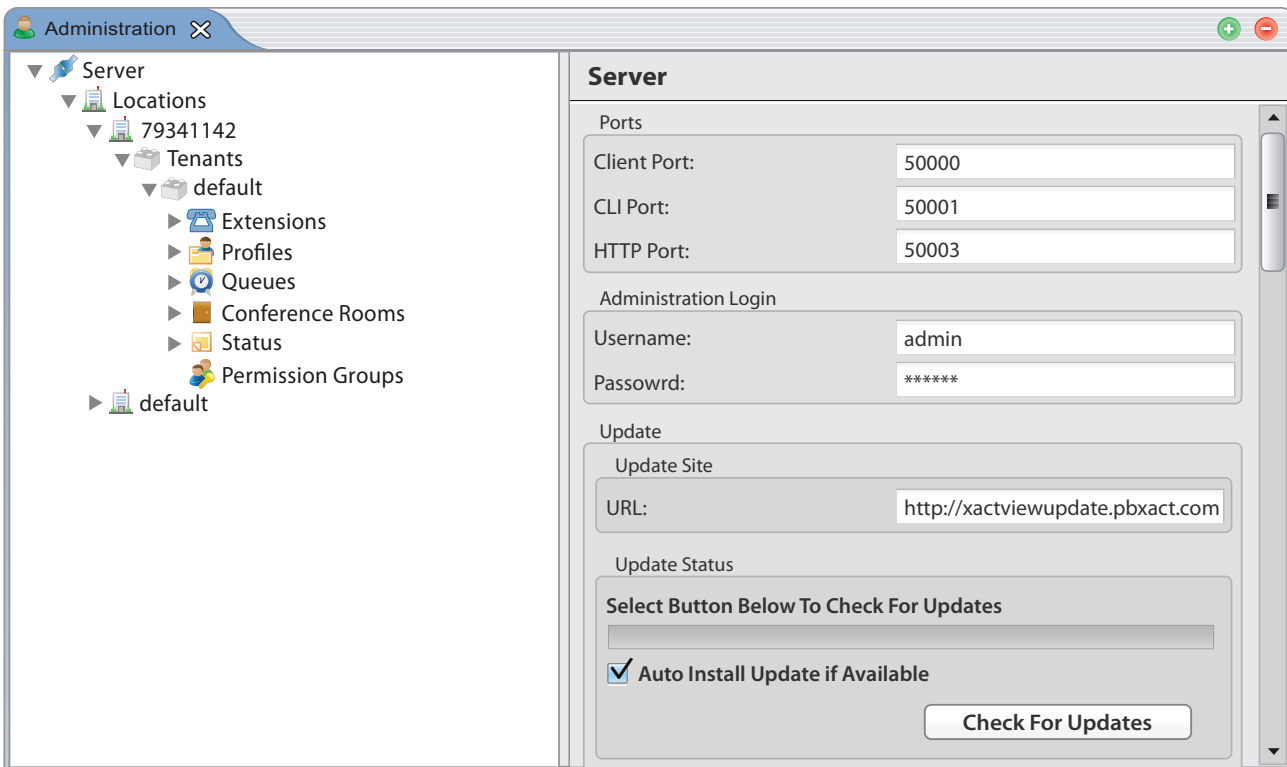
The admin credentials have been defined. Click on the View Button at the top of XactView and select the Administration option.





## Navigating XactView Admin Section

Depending on the setting to be changed, different sections of the admin view are navigated. The main sections are outlined as below:



### Server

This is the base XactView server settings for the entire server. The following can be changed:

- **Extension Buttons**
- **Default Global Permissions**
  
- **Location** - - This should remain unchanged.
  
- **Location Name** (Default) the location name by looking in the XactView Module in the PBX Admin GUI as outlined above on where to find the Admin Username and Password. Nothing here should ever be changed as it is pulled from the Phone System.

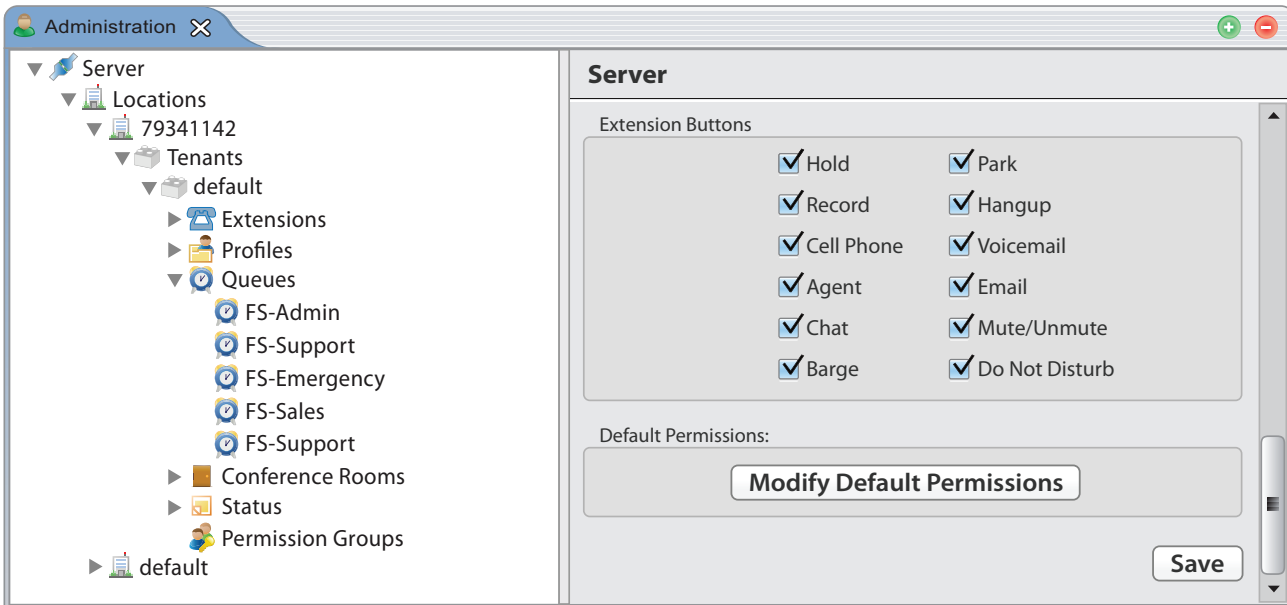
- **Tenant** - - Nothing here should ever be changed as it is pulled this information from the Phone System.
  - **Tenant Name** (Default) The tenant name is revealed by looking in the XactView Module in your PBX Admin GUI as outlined above on where to find the Admin Username and Password. Nothing here should ever be changed as it is pulled from the Phone System.
    - **Extensions** - Nothing here should ever be changed as it is pulled from the Phone System automatically with the XactView module.
    - **Profiles** - Here is where the settings and permissions are defined for each XactView user who will or can log into XactView. These can be changed here:
      - **View Everyone Tab**
      - **Barge Mode**
      - **Color Blocks**
      - **Profile Permission Overrides**
    - **Queues** - This is where information about the queues that are setup on your phone system are defined. This can be changed:
      - **Queue Alarms**
    - **Conference Rooms** - Nothing here should ever be changed as we pull this information from your Phone System
    - **Status** - Nothing here should ever be changed as it is pulled from your Phone Systems Status Management Module.
    - **Permissions Groups** - Here the permissions for a group of common users can be defined and users can be added to this permission group.

## Managing Extension Buttons

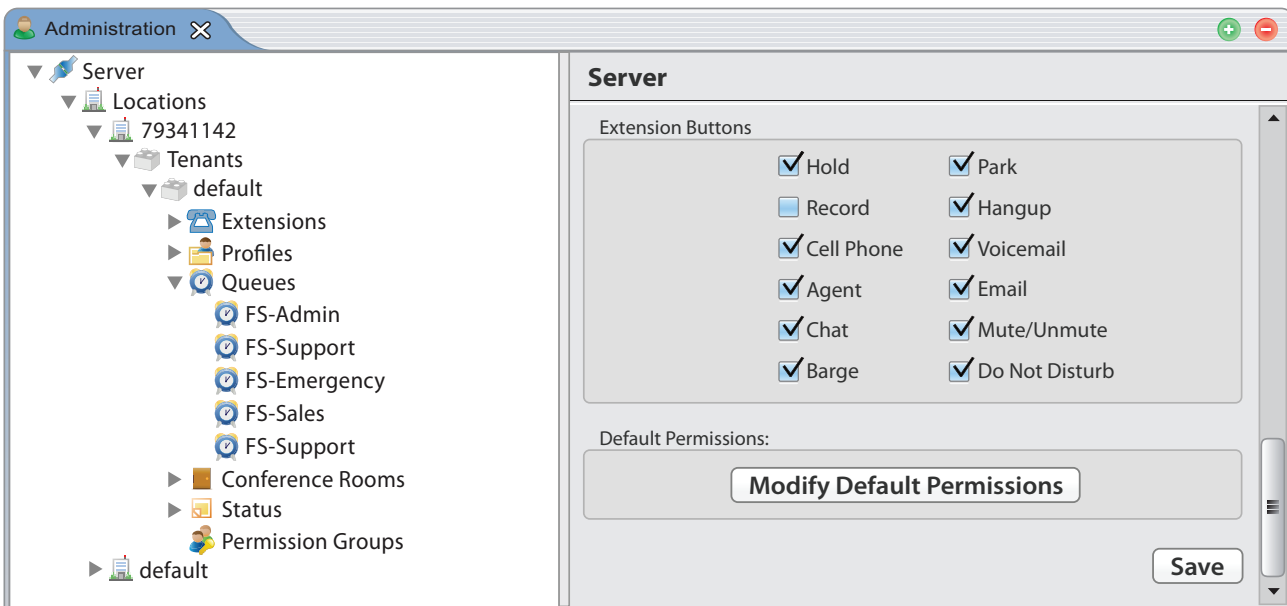
This is where it is determined which buttons inside the extension tabs are able to be viewed. These buttons apply to the server as a whole so if the Record Call Button is removed it will be gone for all users. Do not confuse removing buttons with permission settings. Permission settings control if they can or cannot use a button but not what is displayed.

- Under the main server section scroll toward the button of the tab and a section called "Extension Buttons" is viewable.





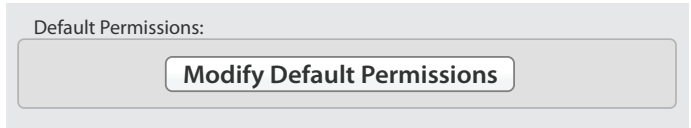
- By default all buttons are enabled. To remove the Record button from the panel uncheck the record option and press the save button at the bottom.



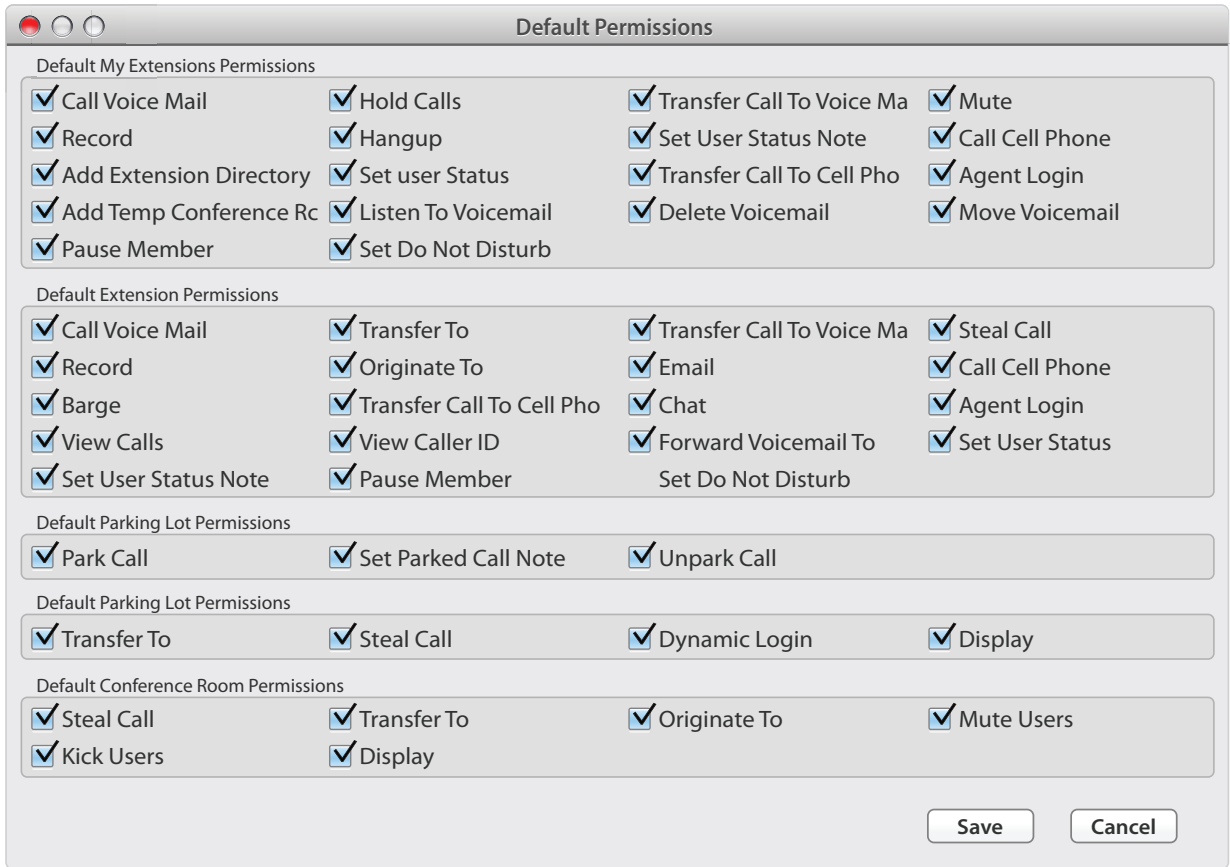
## Default Global Permissions

Here default permissions can be set for all users. These can be overridden later for each user, by default no one can steal a call from another user, but can be setup here. If the CEO wanted to intercept calls into their profile permissions and override the default permissions, that would be set here. Please see [Profile permissions](#) for more information on this.

- Under the main server section scroll toward the bottom of the tab and click on the “Modify Default Permissions” button.



- You should now get a screen that pops up that shows all the default permissions. On a new install the default is to have all permissions enabled.



## There are 5 main categories for permissions

**Default My Extension Permissions-** Permissions for each user has over their own extension.

**Default Extension Permissions-** Permissions that each user has over another user's extension.

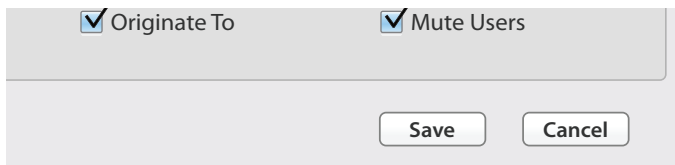
**Default Parking Lot Permissions-** Permissions for each user in regards to the Parking Lot Feature.

**Default Queue Permissions-** Permissions that each user has in regards to the Queue Management Feature.

**Default Conference Room Permissions-** Permissions that each user has in regards to Managing Conference Rooms.

To remove permissions from any user from stealing a call out of the queue as well as remove the ability to record another extensions call or barge in on them, uncheck the option of Record and Barge as it relates to Extension Permissions and also the Steal Call from the Queue section.

When done making your changes press the save button and all the permissions will take effect.

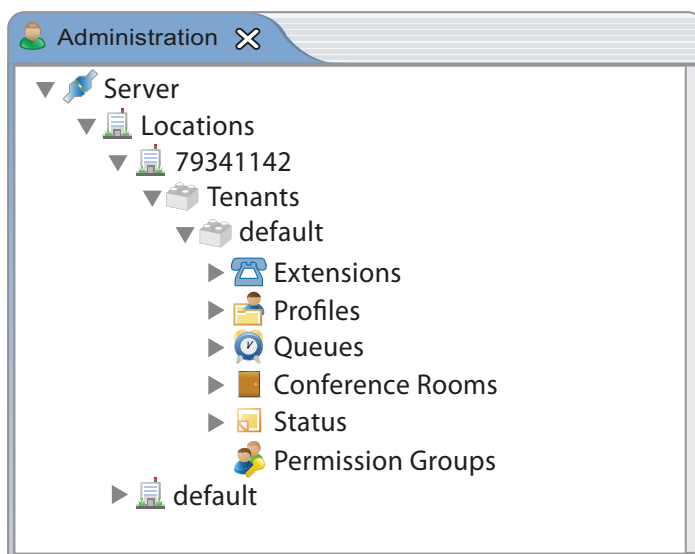


To recap all permissions changes implemented in the Default Permission will apply to all users. If you want to turn off steal calls for all users but allow the CEO to still steal a call you would disable Steal Call as a default here and then Enable Steal Call at the profile level.

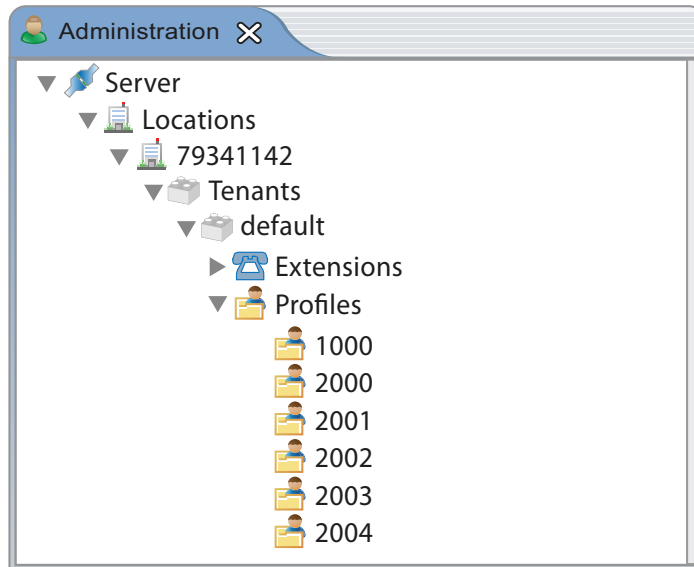
## View Everyone List

By default the only Extension list we include in XactView is a View Everyone list. This gives the user the ability to see every extension on the system. If, for example, you created a new User Group called Sales and you only wanted your sales users to see that list you would uncheck the “View Everyone List” and they would only see the Extension List that you have given them. Please See XactView User Guide on how to create Extension List as it is outside the scope of the Admin User guide.

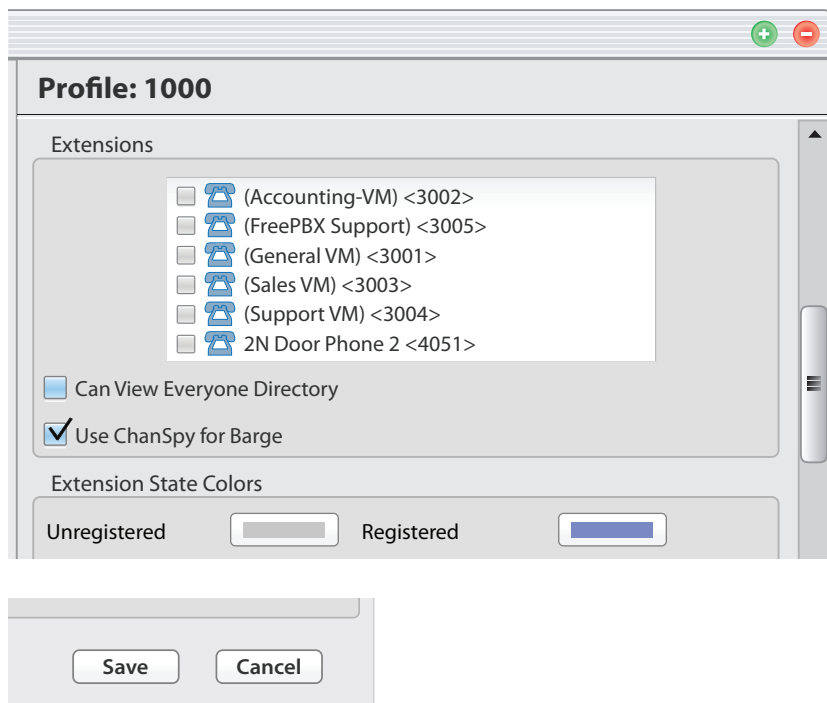
- The Extension List setting is set at the Profile level of the admin view. You will see the screen below. Use our left mouse button and click on the small arrow next to the word Server. It will drop down another level and show Locations. Then click on the small arrow next to Location and that will drop down another level and show default or whatever your location name is. Keep doing this until you see the screen below:



- We will now click on the small arrow next to profile and we will see a list of all users of XactView by Extension Number. Using your mouse left button click on the user that you want change the setting for.



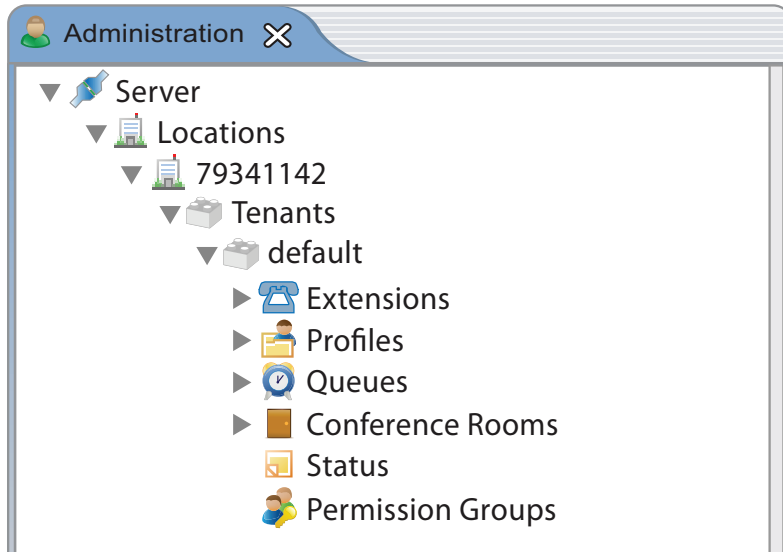
- You will see the right side of the screen fill in with information on this user. Scroll down to the option of “Can View Everyone Directory” and uncheck the option to disable this and press the save button at the bottom.



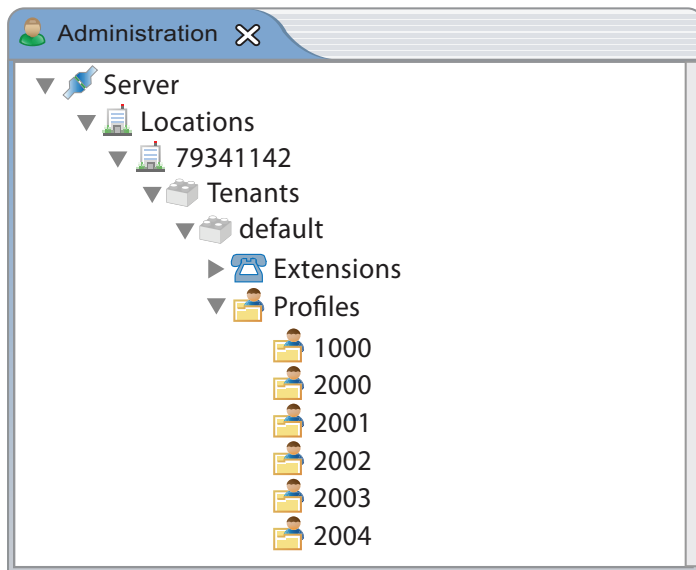
## Barge Mode

When a user barges in on another extension by default they are muted. They can un-mute themselves at any time. When they do this by default the person the user is barging in on will hear what the barger is saying but the other party in the phone call will not. You can uncheck the option that says use ChanSpy for barge and when the barger talks both parties of the call will hear what they are saying.

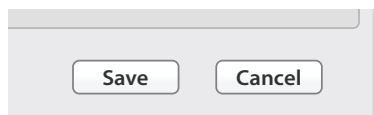
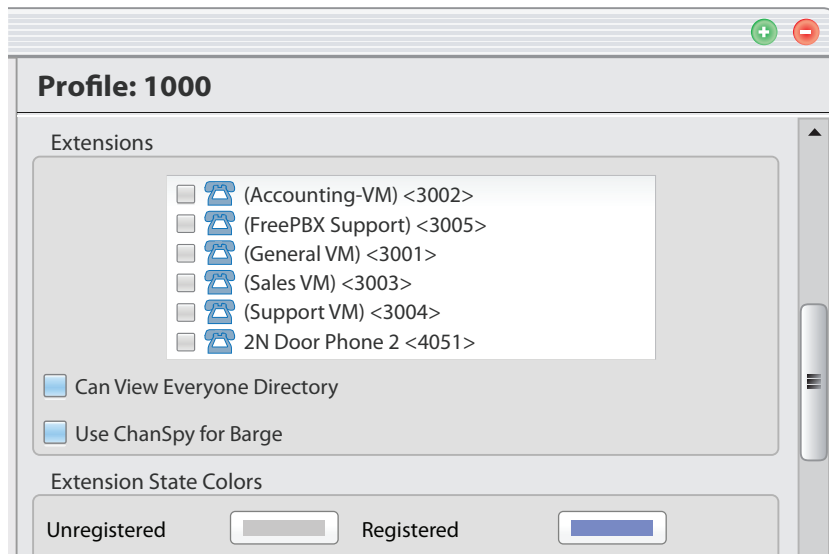
- The Barge mode setting is set at the Profile level of the admin view. You will see a screen like below. We will use our left mouse button to click on the small arrow next to the word server. It will drop down another level and show Locations. You will then click on the small arrow next to Location and that will drop down another level and show default or whatever your location name is. Keep doing this until you see the screen below.



- We will now click on the small arrow next to Profiles, there will be a list of all users of XactView by Extension Number. Using the mouse left button click on the user that you want change the setting for.



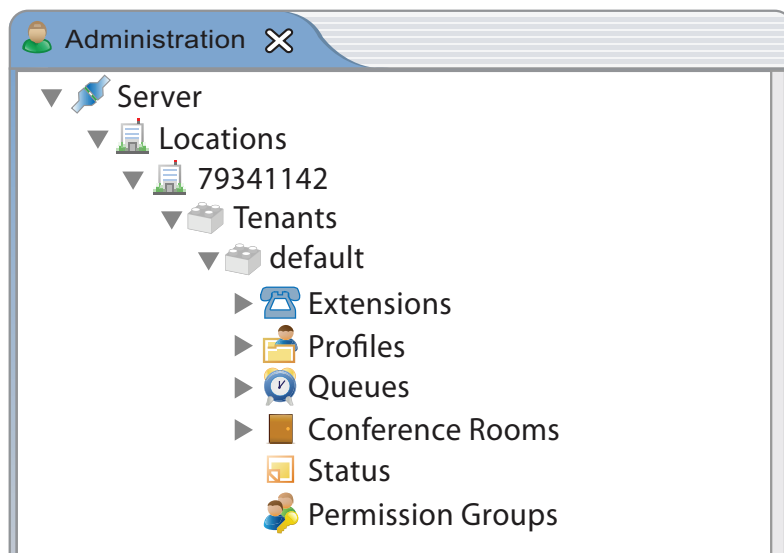
- You will see the right side of the screen fill in with information on this user. Scroll down to the option of “Use ChanSpy for Barge” and uncheck the option to disable the whisper or one party barge and press the save button at the bottom.



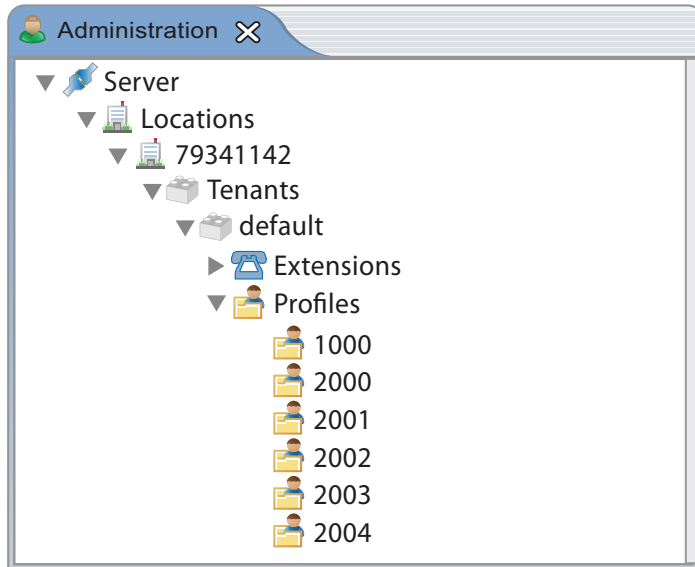
## Color Blocks

Each type of call can have a different color block associated with it. So when I am on a queue call by default it will show my extension block as orange and when on a interoffice call it will show a dark blue. You can change these colors on a per extension basis and also apply the change in colors to all extensions.

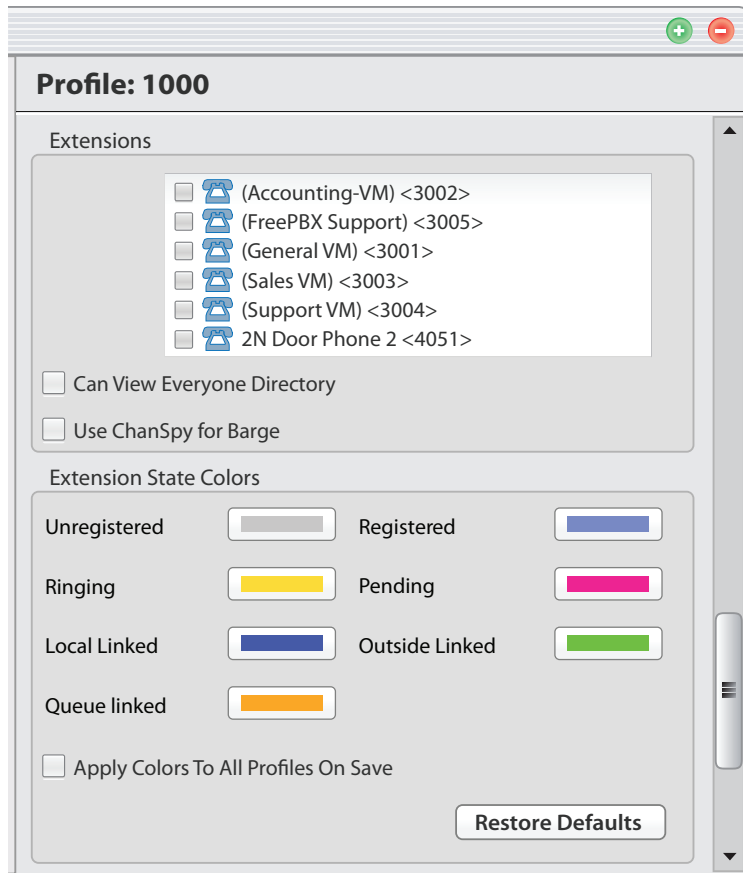
- The Extension State Colors setting is set at the Profile level of the admin view. You should see a screen like below. We will use our left mouse button to click on the small arrow next to the word Server. It will drop down another level and show Locations. You will then click on the small arrow next to Location and that will drop down another level and show default or whatever your location name is. Keep doing this until you see the screen below.



- We will now click on the small arrow next to Profiles and we should see a list of all users of XactView by Extension Number. Using your mouse left button click on the user that you want change the setting for.



- You should see the right side of the screen fill in with information on this user. Scroll down to the section of “Extension State Color” and see each color that is set for each type of state and change the color.



- Each Extension state is defined as below:  
**Unregistered** - Grey- This is the mode when an extension is not registered with the PBX.

**Registered** -Light Blue - This is the mode when a extension is registered with the PBX

**Ringing** - Yellow - Used when an extension is receiving a inbound call but they have not answered the call yet.

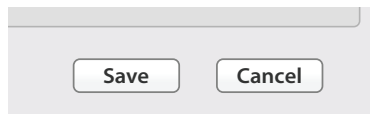
**Pending** - Purple - Used when an extension is making an outbound call but the outbound call has not been answered yet.

**Local Linked** - Dark Blue - Used when an extension is on a call with another internal extension.

**Outside Linked** - Green - Used when an extension is on a call with an outside caller.

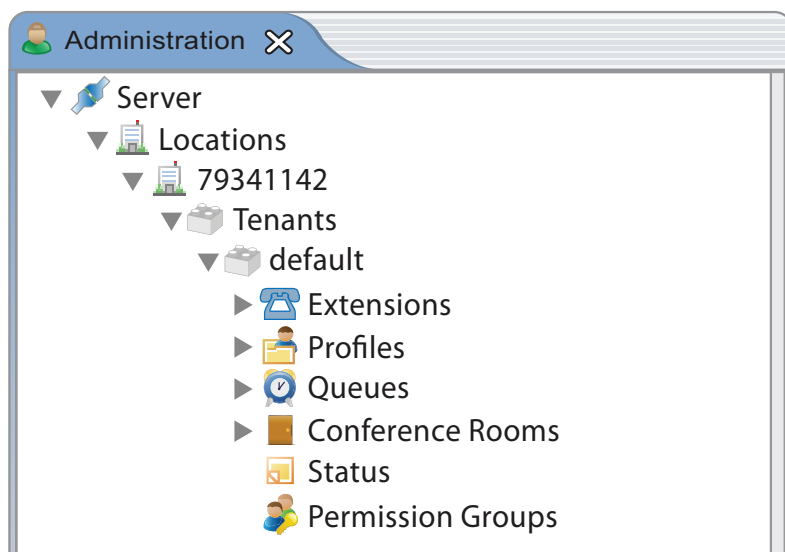
**Queue Linked** - Orange - Used when an extension is on a call that came from a queue.

- You can also check the box that says “Apply Colors to All Profiles on Save” and this will set the colors to all users so everyone has the same colors.
- Once you make made your changes remember to press the save button at the bottom of the tab.



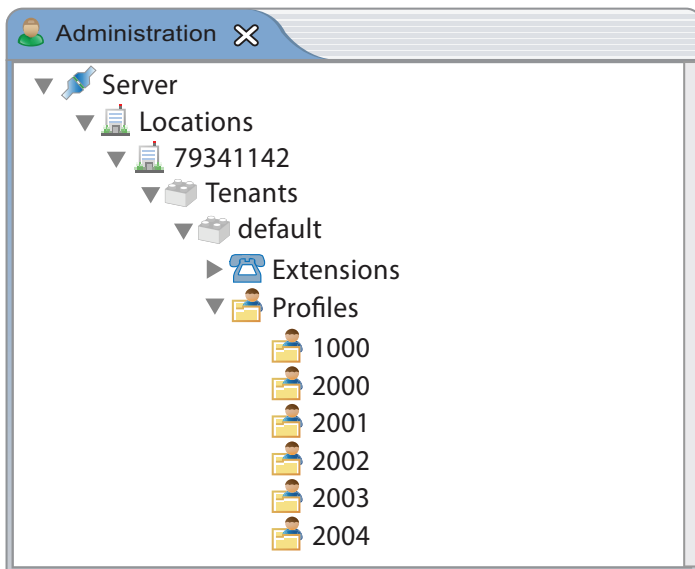
## Profile Permissions

All Profile Permissions are set at the Profile level of the admin view. You will see a screen like below. We will use our left mouse button to click on the small arrow next to the word server. It will drop down another level and show Locations. You will then click on the small arrow next to Location and that will drop down another level and show default or whatever the location name is. Keep doing this until you see a screen like below:

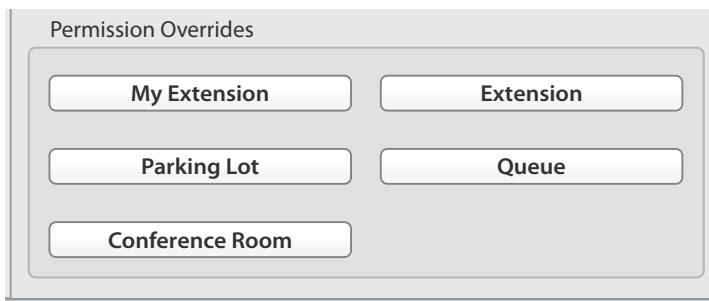




We will now click on the small arrow next to Profiles and we will see a list of all users of XactView by Extension Number. Using your mouse left button click on the user that you want to modify permission for.



You will see the right side of the screen fill in with information on this user. Scroll down to the bottom and you will see a section called Permission Overrides.



There are 5 main categories for permissions and they operate almost the same way you handle permission in the Default Setup.

**My Extension Permissions-** Permissions that each user has over their own extension.

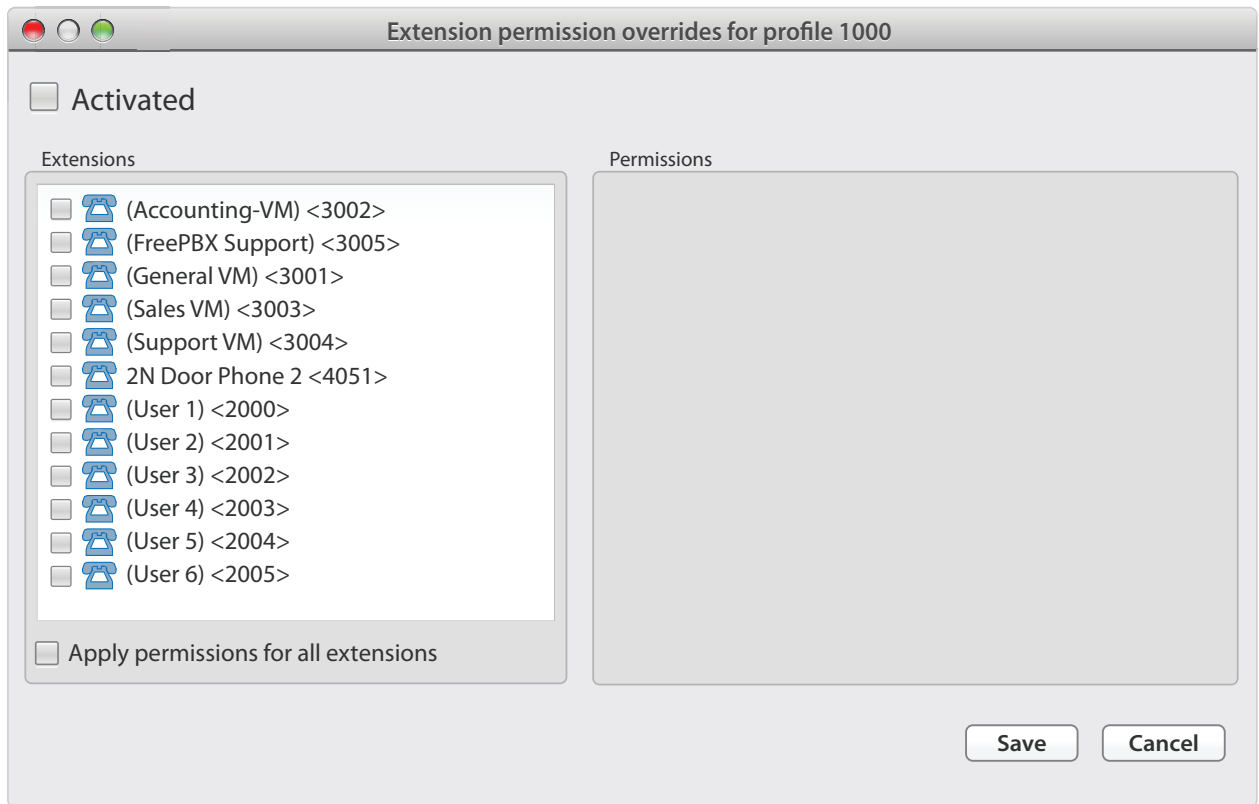
**Extension Permissions-** Permissions that each user has over another user's extension.

**Parking Lot Permissions-** Permissions that each user has in regards to the Park Lot Feature.

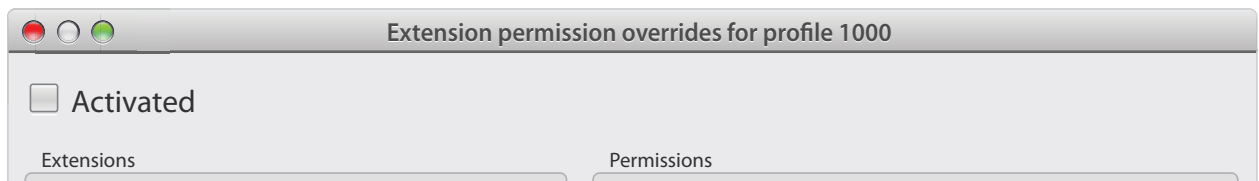
**Queue Permissions-** Permissions that each user has in regards to the Queue Management Feature.

**Conference Room Permissions-** Permissions that each user has in regards to Managing Conference Rooms.

We set our default permissions earlier that all users can record their own calls but not record any other user's calls or barge in and listen to the phone call of other users but we want to let the CEO record any users call or barge in on any user. So we go into the profile of the CEO in XactView and we will click on the Extension Permissions tab since we want to change permissions on how the CEO can interact with other user's extension. We will see a screen like below.

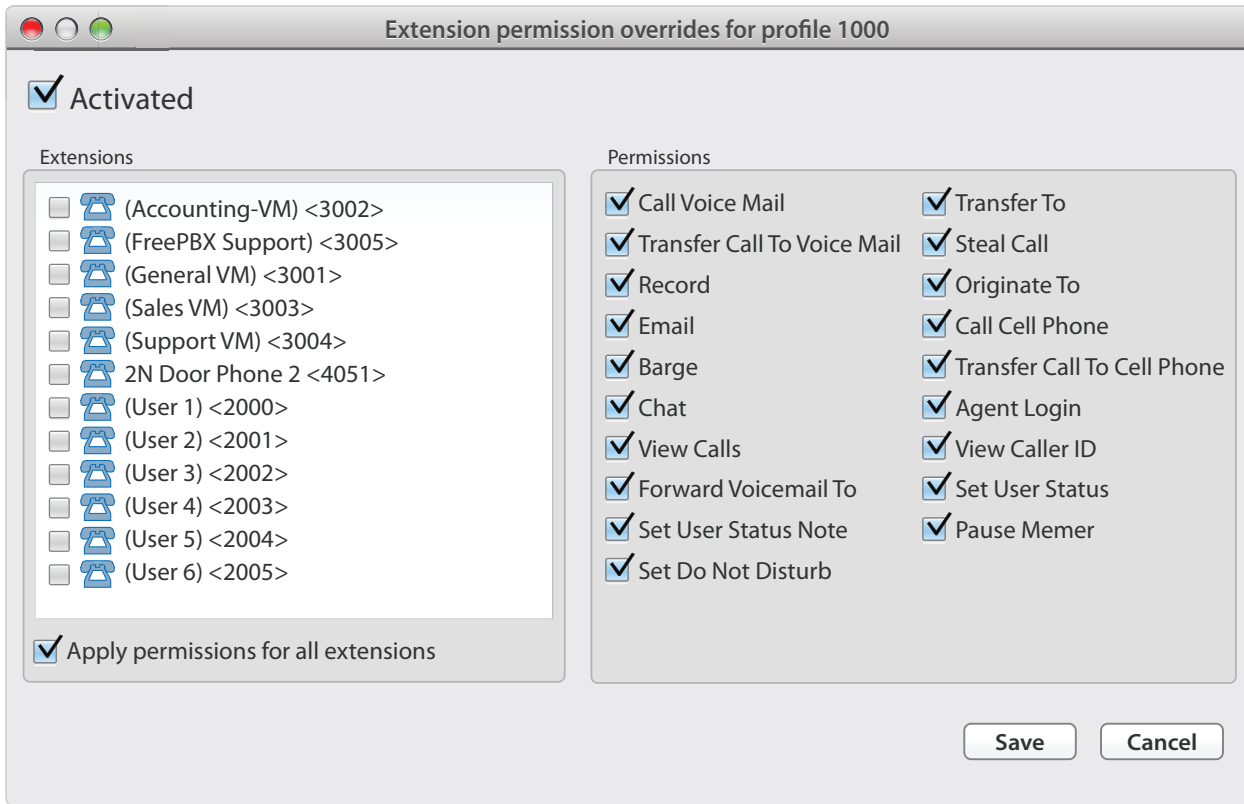


We will want to activate the override feature if not already activated by clicking on the Activated box.



From here we can pick individual extensions that we want to give him/her permission to barge in on and record calls or we can click the apply permissions for all extensions. Since we want the CEO to be able to record calls or barge in on all users, we will check the box that says Apply Permissions for all extensions.

We will now see that by default everything is checked showing enabled. Mainly we can see that the Record and Barge options are both checked. Press the save button at the bottom and now our CEO has permission to record the call of other users or barge in on any other user while the default permission we set earlier do not grant this permission to anyone else.



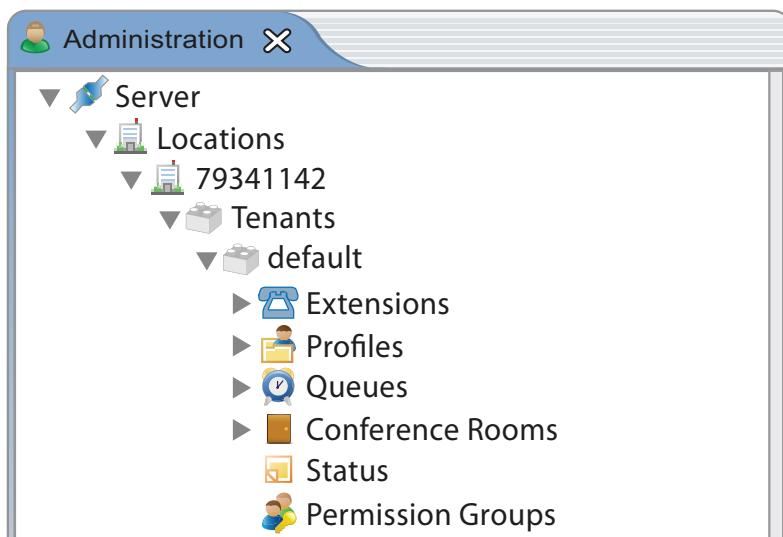
Once you have made your changes remember to press the save button at the bottom of the tab.

## Queue Alarms

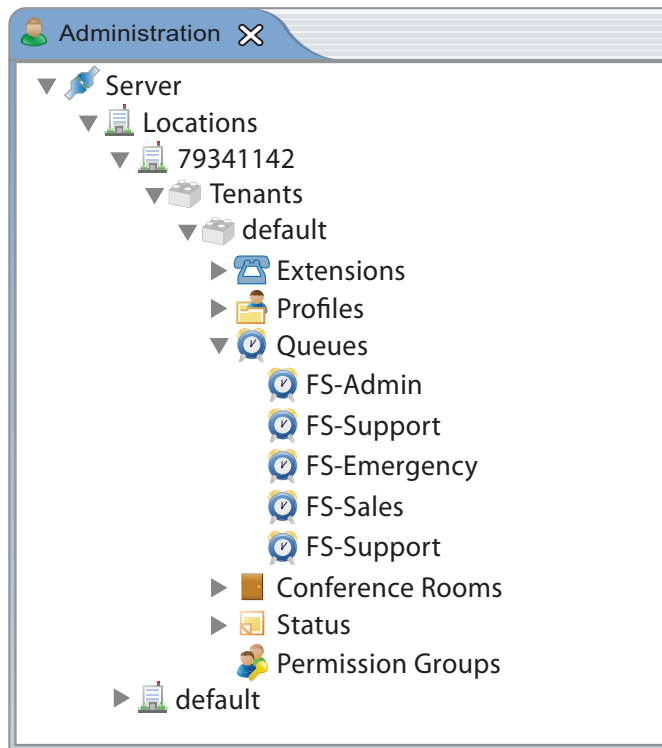
You can setup different visual alarms on a per queue basis for when certain thresholds are met.

**Example:** Turn the queue box to the color of Red when more then 5 callers are waiting in a queue.

- All Queue Alarms are set at the tenant name level of the admin view under the queue section. You will see a screen like below. We will use our left mouse button to click on the small arrow next to the word Server. It will drop down another level and show Locations. You will then click on the small arrow next to Location and that will drop down another level and show default or whatever the location name is. Keep doing this until you see a screen like below.



We will now click on the small arrow next to Queue and we will see a list of all users queues that XactView is monitoring from based on what you set in your PBX Admin GUI. Using the mouse left button click on the queue that you want to manage alerts for.



You will see the right side of the screen fill in with information on your queue.

The screenshot shows the configuration page for the 'Queue: FS-Admin'. The page is divided into three sections: General, Configuration, and Alarms. The General section has two input fields: 'Name' with the value 'FS-Admin' and 'Queue' with the value '4501'. The Configuration section has two input fields: 'Extension' with the value '4501' and 'Context' with the value 'from-internal'. The Alarms section is a table with columns: Enabled, Name, Type, Threshold, Color, and Actions. The table has one row with the following values: Enabled (checkbox), Name (input field), Type (dropdown menu with '[Queue] Calls' selected), Threshold (input field), Color (input field with a red color swatch), and Actions (button labeled 'Add'). At the bottom right of the page is a 'Save' button.

| Enabled                  | Name                 | Type          | Threshold                                   | Color                            | Actions                            |
|--------------------------|----------------------|---------------|---|----------------------------------|------------------------------------|
| <input type="checkbox"/> | <input type="text"/> | [Queue] Calls | <input type="text"/> - <input type="text"/> | <input type="text" value="red"/> | <input type="button" value="Add"/> |

Now we will setup an alert to change the color of the queue to red when we have 5 or more callers waiting in queue and press the Add button.

**Queue: FS-Admin**

General

Name: FS-Admin  
Queue: 4501

Configuration

Extension: 4501  
Context: from-internal

Alarms

| Enabled                             | Name      | Type          | Threshold | Color | Actions |
|-------------------------------------|-----------|---------------|-----------|-------|---------|
| <input type="checkbox"/>            |           | [Queue] Calls | -         |       | Add     |
| <input checked="" type="checkbox"/> | 5 Callers | [Queue] Calls | 5         |       | Delete  |

Save

We will also setup an alert to change the color of the queue to orange when we have caller wait time between 120 and 240 seconds.

**Queue: FS-Admin**

General

Name: FS-Admin  
Queue: 4501

Configuration

Extension: 4501  
Context: from-internal

Alarms

| Enabled                             | Name       | Type                  | Threshold | Color | Actions |
|-------------------------------------|------------|-----------------------|-----------|-------|---------|
| <input type="checkbox"/>            |            | [Queue] Calls         | -         |       | Add     |
| <input checked="" type="checkbox"/> | 5 Callers  | [Queue] Calls         | 5         |       | Delete  |
| <input checked="" type="checkbox"/> | 2 min Wait | [Call] Hold Time(sec) | 120       |       | Delete  |

Save

Lastly, we will setup an alert to change the color of the queue to purple if we exceed 240 second wait time.

**Queue: FS-Admin**

General

Name:

Queue:

Configuration

Extension:

Context:

Alarms

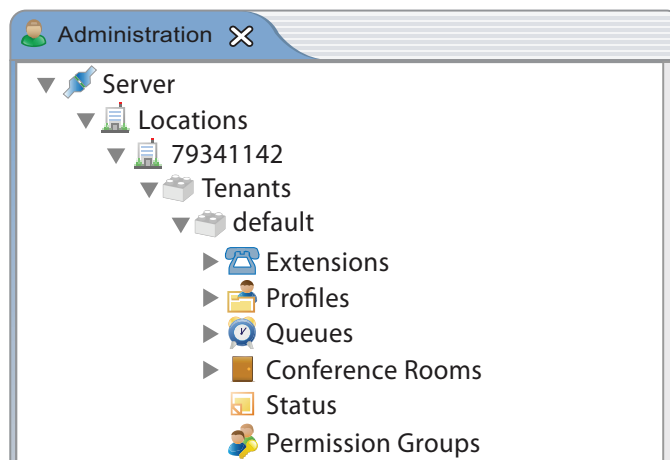
| Enabled                             | Name            | Type                  | Threshold | Color | Actions                               |
|-------------------------------------|-----------------|-----------------------|-----------|-------|---------------------------------------|
| <input type="checkbox"/>            |                 | [Queue] Calls         |           |       | <input type="button" value="Add"/>    |
| <input checked="" type="checkbox"/> | 2 min Wait      | [Call] Hold Time(sec) | 120       |       | <input type="button" value="Delete"/> |
| <input checked="" type="checkbox"/> | 5 Callers       | [Queue] Calls         | 5         |       | <input type="button" value="Delete"/> |
| <input checked="" type="checkbox"/> | Over 4 Min Wait | [Call] Hold Time(sec) | 241       |       | <input type="button" value="Delete"/> |

Press the Save button and you have now created alerts that any user who has permission to view that queue will see if the thresholds for the Alert are met.

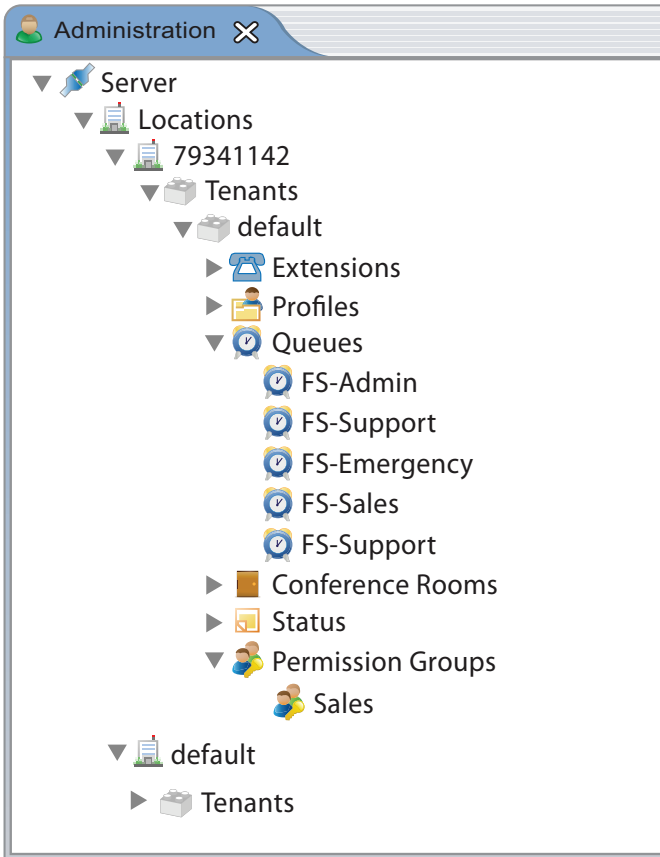
## Permission Groups

Permission Groups let you create groups of users and set permissions on the group. All permissions set in the group will override any permissions from the Default Global Permissions in the event of permissions conflicting between the two.

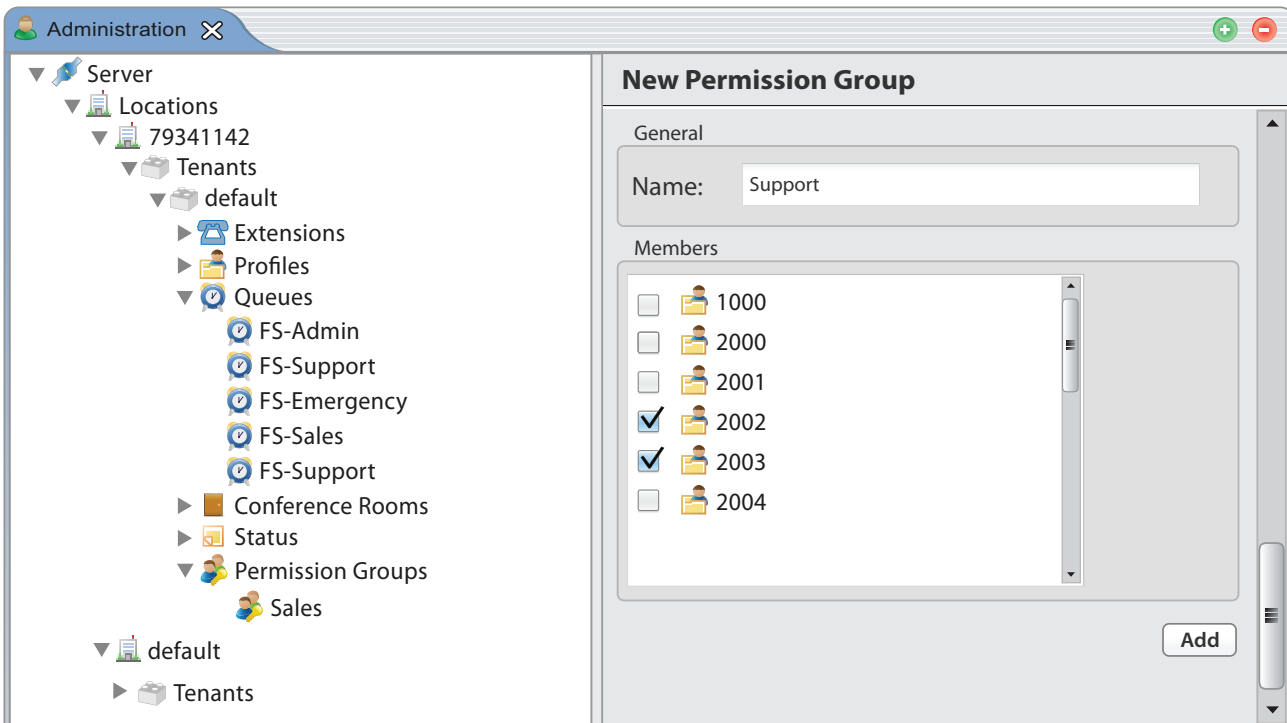
- All Permission Groups are set at the tenant name level of the admin view under the Permission Groups section. You will see a screen like below. We will use our left mouse button to click on the small arrow next to the word Server. It will drop down another level and show Locations. You will then click on the small arrow next to Location and that will drop down another level and show default or whatever the location name is. Keep doing this until you see the screen below.



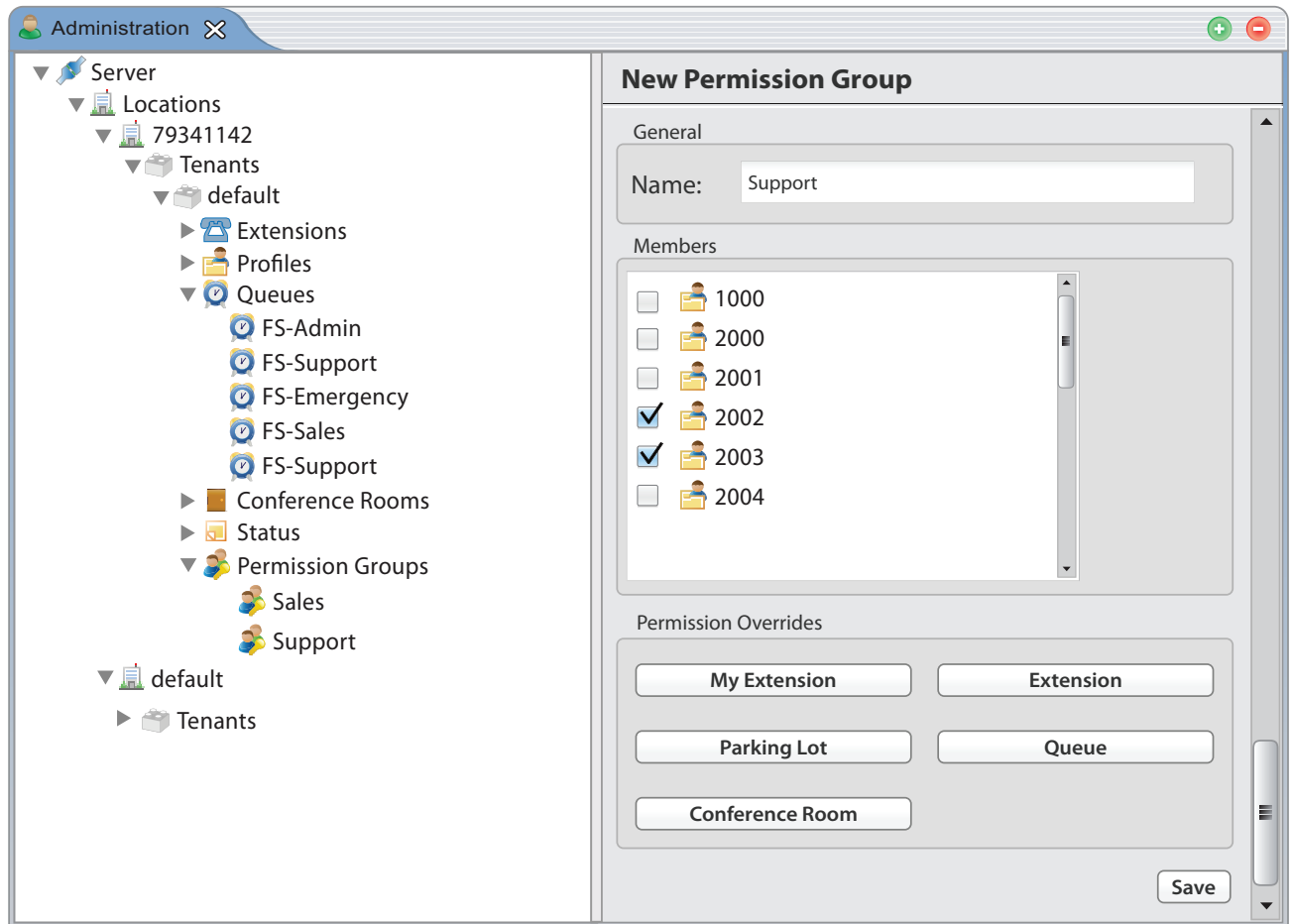
We will now click on the small arrow next to permission groups and we will see a list of all permission groups that have been created Using your mouse left button click on the permission group you want to edit or right click with your mouse over the Permission Group section and pick “new” to create a new group.



When creating a new permission group you will first need to give the group a name (such as Support) and then pick which extensions will be part of this permission group. Press the Add button.



We will then see a list of Permission options that we can set. The same concept applies to setting permissions for a group that you can do for each profile. For more information on setting the actual permissions please see the Section Profile Permission Settings.







**Listen. Talk. Communicate.**

[www.Pulsar360.com](http://www.Pulsar360.com)  
Toll Free: 855-578-5727  
[sales@pulsar360.com](mailto:sales@pulsar360.com)