MetaSphere N-Series
Auto Attendant User's Guide

VC3-304-Issue 3.3-US-Release 1

November 2009

Notices

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1. Getting Started

This manual explains how to configure and manage the MetaSphere N-Series Auto Attendant.

1.1 About This Manual

Chapter 2, **Overview**, introduces the Auto Attendant and provides introductory information about how to use it.

Chapter 3, **Configuring the Auto Attendant**, describes how to use the Business Group Web Interface to set up and manage the Auto Attendant.

Chapter 4, **Telephone Admin Interface**, describes how to use the telephone admin interface to manage the Auto Attendant.

1.2 Related Manuals

MetaSphere N-Series Privacy Defender User's Guide describes the MetaSphere N-Series Privacy Defender functionality as presented to the end user (a subscriber on an Individual Line).

MetaSphere N-Series Music On Hold User's Guide describes the MetaSphere N-Series Music On Hold functionality as presented to the end user (the Music On Hold administrator for a Business Group).

MetaSphere N-Series Conferencing User's Guide describes the MetaSphere N-Series Conferencing functionality as presented to the end user (a conference moderator).

MetaSphere N-Series Firebar User's Guide describes the MetaSphere N-Series Firebar functionality as presented to the end user (the Firebar administrator for an emergency service).

MetaSphere N-Series Mass Announcement Service User's Guide describes the MetaSphere N-Series Mass Announcement Service functionality as presented to the end user (the Mass Announcement Service administrator for a customer who uses this service).

1.3 Conventions

This manual uses the following conventions.

Usage	Convention
Reference to another document	*MetaSphere N-Series Conferencing User's Guide*
Reference to a section within a document	**Overview**
Filename	`.login`
Commands that you type at an operating system prompt	**`cd /`** **`vi .login`**
Placeholder in a command, which you need to replace with a specific value	**`vi`** *filename*
Computer output	`Command completed successfully.`

Danger

This symbol identifies areas where failure to follow the correct procedure may cause injury to yourself or to other people.

Warning

This symbol identifies areas where failure to follow the correct procedure may prevent the equipment from operating correctly.

Information

This symbol identifies additional information that may help you to use the equipment or to perform a task.

2.   Overview

This section provides an overview of the MetaSphere N-Series Auto Attendant and explains how to plan your own customized Auto Attendant.

2.1   Auto Attendant Operation

The Auto Attendant service is intended for business customers who want to provide an automated means of directing incoming calls to the appropriate person within the organization, typically to offload this task from a receptionist.

Auto Attendant allows you to create a menu of different options that a caller can access using telephone key presses. The caller hears an announcement listing the options, such as **To place an order press 1; to speak to the Customer Services Helpdesk press 2; to get directions to the store press 3**. He or she can then access each of these options by pressing the appropriate key on the telephone keypad.

You can define different menus for use out of business hours and on holidays, so that the caller is presented with a different set of options according to the time of the call, or is presented with an announcement that the business is closed and cannot accept calls at this time.

You can also include options to allow callers to reach a particular phone extension directly, in either or both of two ways:

- **Dial-by-name:** Callers who know the name of the person they want to call can dial the person's name using the telephone keypad. The Auto Attendant then asks for confirmation of the correct extension (there may be two or more names that match the key sequence used) before connecting the caller direct to the requested extension.

- **Dial-by-extension:** Callers who know the extension number of the person they want to call can dial this number. The Auto Attendant then connects the caller direct to the requested extension.

2.2   Telephone numbers used with Auto Attendant

There are several different telephone lines and telephone numbers associated with the Auto Attendant service, as follows.

Your service provider will have set up the telephone lines to your business as a **Business Group**, in other words a group of telephone lines associated with a single organization.

- Within this group, one or more lines are designated **Business Group administrator lines**, and are assigned to administrators who use the **Business Group Web Interface** to manage the overall function of the Business Group (including the Auto Attendant service). The administrator uses the directory number of his or her administrator line, together with a password, as identification to access the Business Group Web Interface. For more details of using this interface, see section 3.1 of this manual.

- One or more lines within the group are set up as **Auto Attendant lines**; this means that you can provide Auto Attendant service to callers on these lines. If you have more than one Auto Attendant line, you can provide different menu options on each line; for example, you could have one line for sales inquiries and another for customer support inquiries.

    In the unlikely event of a failure of the Auto Attendant platform, calls to an Auto Attendant line will be routed directly to that line and not intercepted by the Auto Attendant.

- The other lines within the group are identified in the Auto Attendant system by their intercom codes (extension numbers). They do not provide Auto Attendant function directly, but the Auto Attendant menus can transfer calls to them. In addition, callers can access them using dial-by-name or dial-by-extension if you set up the Auto Attendant to allow this.

In addition to these lines:

- There is a separate access telephone number for the **Telephone Admin Interface**, which allows you to manage the Auto Attendant system from a telephone. The administrator uses the directory number of the Auto Attendant line, together with a password, as identification to access the telephone admin interface. For more details of using the telephone admin interface, see Chapter 4 of this manual.

- You can set up Auto Attendant menus to transfer calls to numbers outside the Business Group (as well as to extensions within the group).

In order to use the Telephone Admin Interface, you must use a telephone that includes the **#** (pound) and ***** keys.

2.3   Business Groups and Departments

As described in the previous section, the telephone lines to your business make up a **Business Group**. If there are a large number of lines, they can be divided into different **departments** so that each department can manage its own resources. If this applies to your Business Group, your Service Provider will have set these departments up according to your requirements; otherwise you do not need to read this section.

- A **Business Group administrator line** can be assigned to a particular department, so that the user of this line can manage the resources associated with this department and any sub-departments below it. Alternatively, it can be assigned to the top-level Business Group, so that it can manage the whole group.

- An **Auto Attendant line** can be assigned to a particular department, so that the user of an administrator line for this department (or for a higher-level department of which this is a sub-department) can manage it. Alternatively, it can be assigned to the top-level Business Group, so that it can be managed only by the user of an administrator line for the whole group.

- The other lines within the group can be assigned to a particular department or to the top-level Business Group. The menus for any Auto Attendant in the Business Group can transfer calls to them, and callers can access them using dial-by-name or dial-by-extension if you set up the Auto Attendant to allow this, regardless of whether they are in the same department as the Auto Attendant line.

If you are using Auto Attendant lines that are assigned to particular departments, you should be aware of the following.

- If you set up an Auto Attendant menu to use the Directory option, as described in section 3.5, **Menus**, this allows callers to access any extension in the Business Group using dial-by-name or dial-by-extension; it is not restricted to the extensions that are in the same department as the Auto Attendant line. If you do not want callers to access lines outside this department, do not use the Directory option; instead, set up your Auto Attendant menus to provide direct forwarding to each extension in this department.

- You can use the **Telephone Admin Interface** to manage an Auto Attendant in any department within the group, by logging in to the interface using the Auto Attendant line's telephone number. However, when you use the interface to record extension names, you will be able to do this only for extensions that are in the same department as the Auto Attendant or in any sub-department below it. If you need to record names for extensions in other departments, you will need to do one of the following.

  - Log in to the telephone admin interface using the number of an Auto Attendant line in the top-level Business Group, or in another department containing the extensions for which you want to record names.

  - Record the names separately as described in section 2.5, and use an administrator line for the top-level Business Group to upload them using the Business Group Web Interface.

- If you are using an administrator line for the top-level Business Group, or for a department that includes sub-departments, you can use the Business Group Web Interface to move Business Group Lines between departments. However, it may take up to a day for your changes to appear in the Auto Attendant interface, because information about the Business Group structure is transferred to Auto Attendant once a day. Similarly, if your Service Provider adds a new Business Group Line, it may take up to a day for this line's extension to appear in the Auto Attendant interface.

2.4 Planning your Auto Attendant

Before you start to set up your Auto Attendant, it is a good idea to sketch out the operation of each menu on paper. This allows you to plan what options you need from the menu and how each one will operate.

For example, the main menu for a pizza company may need to include the following options:

- Play an announcement giving directions to the store, then return to the main menu so that the user can select another option
- Place an order with a server
- Speak to the manager
- Speak to another employee using dial-by-name.

The sketch below shows how this menu would operate, including the key presses to access each option.

Figure 1.   Sketch of sample Auto Attendant main menu

"Perfect Pizza" Auto Attendant
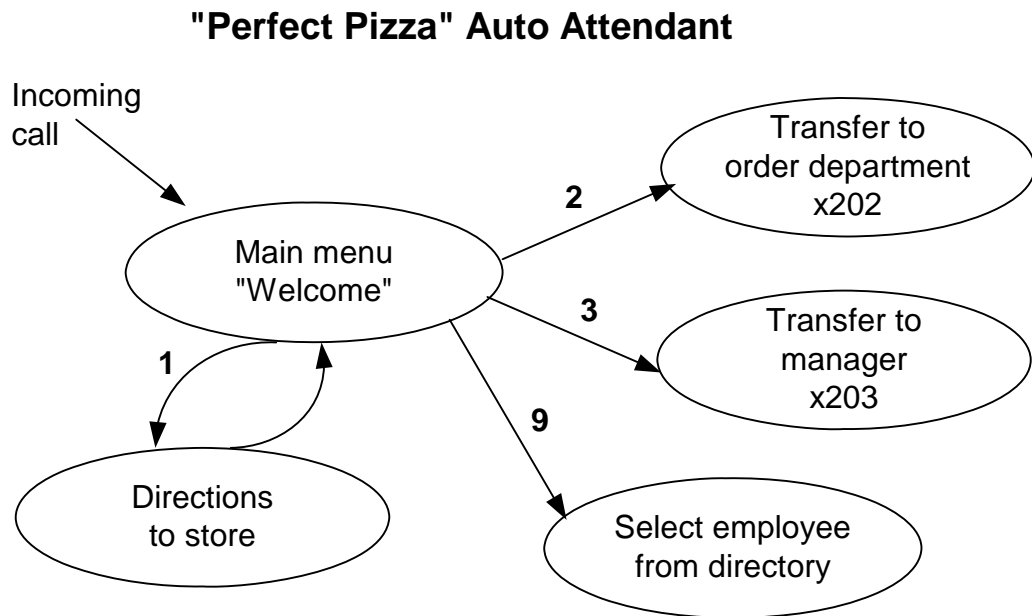
In the diagram, option 1 (directions to the store) is shown with an arrow returning to the main Welcome menu so that the caller can select another option if required. The other options do not need to return to the menu.

For out-of-hours and holiday operation, the Auto Attendant may simply provide an announcement that the store is closed (without allowing the caller to select any options), or it may provide an alternative set of menu options (in which case you should create a similar sketch for these).

2.5 Recording announcements and names

The recorded announcements played to callers are a very important part of the Auto Attendant system. There are two ways to create these announcements.

- You can pre-record announcements using your laptop or PC and a microphone, edit and trim them if required, and save them in the standard Windows .wav or .mp3 format. The Auto Attendant's Business Group Web Interface then allows you to upload these files for use on the system.

- You can use the Auto Attendant telephone admin interface (described in Chapter 4) to record the announcements over the telephone. Use the three digit announcements numbers from the web interface to specify which announcement is to be recorded.

You can upload recordings to the server in MP3 format or in most WAV formats. If you upload a file in a WAV format that the server does not support, this file will be rejected immediately after you upload it..

Section 3.4, **Announcements**, describes how to configure the announcements used in the Auto Attendant. If you have already recorded an announcement, you can upload the file as described in this section. Otherwise, you can add it later using the telephone admin interface as described in section 4.3, **Managing Announcements**.

When you are planning announcements to be used with Auto Attendant menus, it is a good idea to describe each possible action followed by its associated key press (rather than putting the key press first). For example, you should say **To speak to the manager press 4**, rather than **Press 4 to speak to the manager**. This makes the menu easier to use, because the caller does not have to remember the key press while listening to the action description to find the correct action.

The Auto Attendant also uses recordings to identify each extension when providing dial-by-name operation. If you want to allow callers to reach a specific extension using this feature, you will need to record a name for each extension that can be accessed using it. Typically this is the first and last name of the person using that extension, but it can also be a description such as **Manager** or **Customer Service**.

Section 3.2, **Extensions**, describes how to configure the extension names used in the Auto Attendant. If you have already recorded an extension name, you can upload the file as described in this section. Otherwise, you can add it later using the telephone admin interface as described in section 4.4, **Managing Extension Name Recordings**.

3.   Configuring the Auto Attendant

This section explains how to use the Business Group Web Interface to create your own customized Auto Attendant.

3.1   Accessing the Business Group Web Interface

To access the Business Group Web Interface, you will need the following information, which your telephone service provider should give to you.

- The website address (URL) of the Business Group Web Interface
- The telephone number of the administration line for your Business Group or department
- The password assigned to this line.

Start your web browser and enter the Business Group Web Interface address in the address bar. You may see one or two security dialogs; choose **OK** or **Yes** to accept these.

You should then see the Business Group Web Interface logon screen, which asks you for a directory number and password. Enter your telephone number and password, then click the **Login** button.

When you have logged in successfully, you will see a list of options for managing your Business Group on the left-hand side of the screen. Choose **Auto Attendant** from this list.

The screen displays a menu tree with an ᴬA entry for each Auto Attendant in your Business Group or department (identified by the Business Group Line's telephone number). If your account has more than one Auto Attendant, you will see more than one ᴬA entry in this tree.

If the department associated with your administration line has one or more sub-departments, you will see links to these at the bottom of the screen.

- To manage an Auto Attendant that is in a sub-department, click on the link for that sub-department.

- When you have followed the link to a sub-department, an additional link appears at the top of the screen, allowing you to move back up to the parent department.

Click on the ⊞ symbol next to your Auto Attendant number to expand the menu tree, as shown below.

Figure 2.   Auto Attendant menu tree
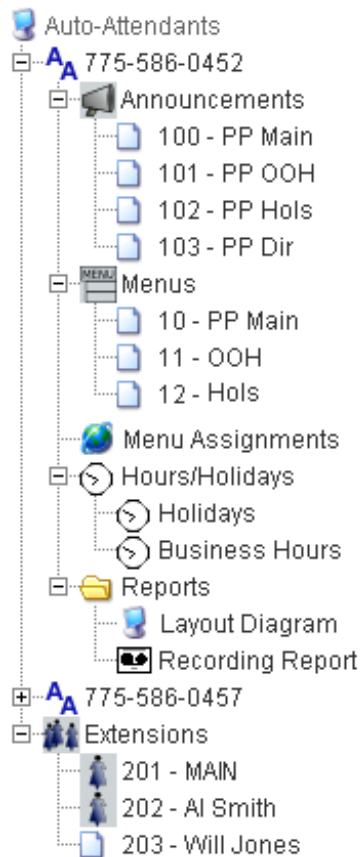
This shows the following options for managing the Auto Attendant.

	Menu Assignments	Specify which Auto Attendant menu is used for regular business hours, out of hours, and on holidays.
	Hours/Holidays	Specify what your normal business hours are and which dates are holidays.
	Announcements	Specify the announcements used by this auto attendant.
	Menus	Specify the menus used by this auto attendant.

3-2   Configuring the Auto Attendant

🗁	Reports	Create reports that show how the auto attendant is set up: • Layout Diagram: this presents a diagram of the menu structure of your auto attendant, showing the different paths through the menus and how many times each path has been followed. • Recording Report: this shows all the recordings included in your auto attendant (either for announcements or for the names associated with extension numbers), and highlights any missing recordings.
👥	Extensions	This is a list of the extension numbers available to this business group (the Business Group Lines that have intercom codes assigned to them). A call to an Auto Attendant can be routed to any of these numbers by the Auto Attendant's menus.

3.2   Extensions

The 👥 Extensions entry in the menu shows a list of the extension numbers in the business group or department that you are managing (the Business Group Lines that have intercom codes assigned to them).

ⓘ If your Service Provider adds a new Business Group Line, it may take up to a day for this line's extension to appear in the Auto Attendant interface, because information about the Business Group structure is transferred to Auto Attendant once a day.

In the same way as for managing Auto Attendants, if the department associated with your administration line has one or more sub-departments, you can follow links at the bottom of the screen to manage extensions in these sub-departments.

The extension numbers may be 1 - 7 digits long, but all extension numbers in the group are the same length.
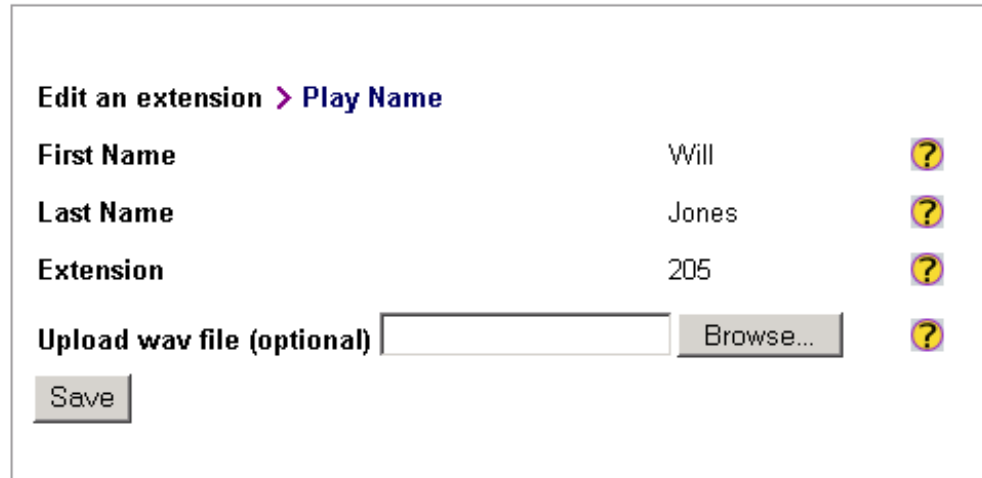
- A call to an Auto Attendant can be routed to any extension in the Business Group by the Auto Attendant's menus.

- Callers can also access these extensions using dial-by-name or dial-by-extension if you configure the Auto Attendant's menus to include this; for more details, see section 3.5, **Menus**.

The list of extensions is set up automatically from the configuration of the Business Group, and you cannot change it. However, you can specify or change the recording file associated with each extension.

Click on a particular Extension entry in the menu tree to view details of the extension.   The example below shows a 3-digit extension number.

Figure 3.   Extension page

Extensions

Edit an extension > Play Name

First Name	Will	⑦
Last Name	Jones	⑦
Extension	205	⑦
Upload wav file (optional) [ ] Browse...		⑦
Save		

Field	Description
First Name, Last Name	The name associated with this extension: either the name of the person who uses it, or a name describing its use (such as **Help Desk** or **Manager**). This is shown for information only and you cannot change it. • The user of the extension sets up this name in the Business Group Web Interface, which provides a single field for this name; the content up to the first space is taken to be the first name, and all remaining content is taken to be the last name (ignoring any further spaces). • The name supplied by the user is transferred automatically to Auto Attendant as part of the Business Group configuration every four hours. This means that there may be a delay after the user changes the name before you see the new name in this entry. If the user changes this name, you may need to re-record the name as described in the **Upload wav file** field below.

Field	Description
Extension	The extension number. This is shown for information only and you cannot change it.
Upload wav file (optional)	In order to allow callers to access this extension using dial-by-name, you will need a recording of the extension name. You can either record this on your personal computer as a WAV or MP3 file as described in section 2.5, **Recording announcements and names**, or use the telephone admin interface of the Auto Attendant to record it as described in section 4.4, **Managing Extension Name Recordings**. If you have recorded the name on your personal computer, click the **Browse** button to locate the recorded file and make it available on your Auto Attendant.

You can upload recordings to the server in MP3 format or in most WAV formats. If you upload a file in a WAV format that the server does not support, this file will be rejected immediately after you upload it.

If you have made changes to these fields, click on **Save** to save them. To abandon your changes and leave the extension as it was, click on any other entry in the menu tree without clicking on **Save**.

To hear the current recording of the name, click on the link **Play announcement** at the top of the screen. If no recording is available, this link is replaced by the text NO RECORDING highlighted in red.

If you use the **Directory** action in an Auto Attendant menu, this allows callers to access any extension in the Business Group using dial-by-name or dial-by-extension; it is not restricted to the extensions that are in the same department as the Auto Attendant line. This means that you will need to record names for all extensions in the Business Group, in one of the following ways.

- Record the names on your PC, and use an administrator line for the top-level Business Group to upload them using the Business Group Web Interface.
- Record the names in the telephone admin interface using the number of an Auto Attendant line in the top-level Business Group.

3.3 Account Information

The Account Information entry in the menu allows you to define the overall properties of the Auto Attendant.

Click on the auto attendant number ^{A}A to view the account information. This screen allows you to

- Activate and deactivate the auto attendant

- Assign the extension to which calls will transfer when the auto attendant is disabled

- Assign the admin password for use with the telephone admin interface

- Choose the directory matching method for callers selecting an extension by name (first name or last name)

- Choose the prefix key for callers selecting an extension using dial-by-extension.

Figure 4. Account information page

Account Information

Account: 7755860457 , DN: 7755860457

|	
AutoAttendant Status	☐ Enabled ❓
Default Telephone Number	201 - MAIN ❓
Admin Password for Telephone Access	0457 ❓
Directory Matching Method	LASTNAME ❓
Extension Prefix	* ❓
	Save

Field	Description
Auto Attendant Status	When this field is checked, the Auto Attendant is enabled and handling the calls based on the menus and menu assignments you have defined. When this field is not checked, all calls to this Auto Attendant will be directed to the extension shown in the **Default Telephone Number** field.

Field	Description
Default Telephone Number	The extension number that calls will be transferred to when the Auto Attendant is disabled, or if an error occurs in processing a call through the Auto Attendant menus. Click on the field to select from the available extension numbers.
Admin Password for Telephone Access	The password to access the telephone admin interface. This interface provides access to activate and deactivate the Auto Attendant, to record announcements and extension names, and to test the Auto Attendant's menus. To specify the password, type a string of digits 0-9, which must be four digits long. Anyone using the admin interface will need to use this password in order to access these functions.
Directory Matching Method	The Auto Attendant can allow callers to access a particular extension by typing the user name associated with that extension on the telephone keypad. This field specifies whether this function matches on the user's first name or last name. Click on the field to select the option you want to use.
Extension Prefix	The Auto Attendant can allow callers to access a particular extension by dialing a prefix key followed by the extension number. This field specifies the prefix key that they should use. Type a character corresponding to a key on a standard telephone keypad: a digit **0**-**9** or the ***** or **#** character. Note that the key you use will not be available as a selection key in any of the Auto Attendant menus.

If you have made changes to these fields, click on **Save** to save them. To abandon your changes and leave the account information as it was, click on any other entry in the menu tree without clicking on **Save**.
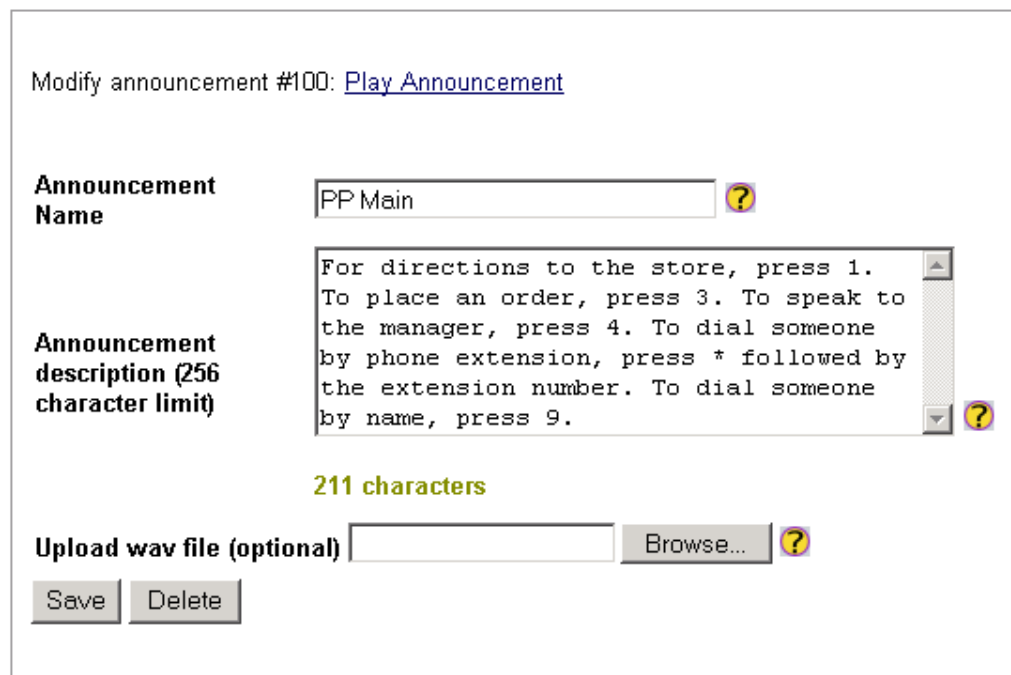
3.4   Announcements

The 📢 Announcements entry in the menu allows you to define the announcements used in the Auto Attendant. You can create a maximum of 150 announcements for each Auto Attendant.

Click on the Announcements entry in the menu to display the announcements used in the Auto Attendant. If there are any announcements already defined for this Auto Attendant, they are listed below the Announcements entry. If you cannot see them, click on the ⊞ symbol next to the Announcements entry to expand the tree.

To add a new announcement, click on the top-level Announcements entry to show a blank dialog where you can fill in the details of the new announcement.

Figure 5.   Announcements page

Field	Description
Announcement Name	A name to identify this announcement. Type a name (maximum 30 characters) that makes it easy to distinguish this announcement among all the announcements you use in this Auto Attendant.

Field	Description
Announcement Description	A detailed description of the announcement. You can type a maximum of 256 characters. You may find it helpful to use the actual text spoken in the announcement as the announcement description. If you do this, remember to update the description if you later re-record the announcement.
Upload wav file (optional)	In order to use this announcement, you will need a recording of the spoken announcement. You can either record this on your personal computer as a WAV or MP3 file as described in section 2.5, **Recording announcements and names**, or use the telephone admin interface of the Auto Attendant to record it as described in section 4.3, **Managing Announcements**. If you have recorded the announcement on your personal computer, click the **Browse** button to locate the recorded file and make it available on your Auto Attendant.

You can upload recordings to the server in MP3 format or in most WAV formats. If you upload a file in a WAV format that the server does not support, this file will be rejected immediately after you upload it.

When you have filled in these fields, click **Create** to add the new announcement.

Each announcement you create appears with a 3-digit prefix in the menu tree: the first announcement you create has the prefix `100`, the second `101`, and so on. These prefixes are created automatically and you cannot change them. When you are using the telephone admin interface as described in chapter 4 to check or modify announcements, you will need to use these prefixes to identify each announcement you want to manage.

To check or modify an existing announcement, click on the announcement name in the menu tree. This brings up a dialog similar to the new announcement dialog above, with an additional link **Play announcement** at the top. Make any changes you need to the fields in this dialog, and then click **Save** to update the announcement.

To hear the current recording of the announcement, click on the link **Play announcement** at the top of the screen. If no recording is available, this link is replaced by the text NO RECORDING highlighted in red.

If you have made changes to these fields but you now want to abandon your changes and leave the announcements as they were, click on any other entry in the menu tree without clicking on **Create** or **Save**.

To delete an existing announcement, click on the announcement name in the menu tree, and then click **Delete** at the bottom of the announcement dialog. You will see a confirmation message asking you to confirm deleting the announcement; choose **OK** to confirm or **Cancel** to leave the announcement as it was.

Before you delete an announcement, check that it is not being used by any of the menus in the Auto Attendant. The Layout Report, described in section 3.9.1, may be helpful in checking this.

3.5   Menus

The ▤ entry in the menu allows you to create the menus used in the Auto Attendant and the valid key presses in each menu. You can create a maximum of 150 menus for each Auto Attendant.

You will normally need to create an initial Welcome menu for business hours, and also menus for out-of-hours and for holidays (although these can share the same menu if you do not need different operation at different times). If any menu option on these initial menus directs the user to a further set of options, you will also need an additional menu to present these options.

Even if the Auto Attendant does not allow callers to choose any menu options during out-of-hours and holiday operation, for example if it simply plays an announcement and does not allow callers to speak to anyone, you still need to create a menu to define this operation. See **Timeout action** below for more details.

Click on the Menus entry in the menu to define each menu.

The first group of fields in the Menus page provides an overall summary of the menu.

Figure 6.   Menus page

Menus

Field	Description
Menu Name	A name to identify this menu. Type a name (maximum 30 characters) that makes it easy to distinguish this menu among all the menus you use in this Auto Attendant.
Menu Description	A detailed description of the menu. You can type up to 256 characters. It may be helpful to summarize the main actions that are available from the menu and the default action that is taken if the menu times out without the user pressing a key.
Announcement	The announcement to be played for this menu. Click on the field to select from the announcements you have already created.

Field	Description
Timeout Period	The length of time in seconds that the Auto Attendant should wait for the user to select an option by pressing a key. If the user does not select an option within this time, the Auto Attendant performs the action associated with the **Timeout** filter.

If you have made changes to these fields, click on **Save** to save them. To abandon your changes and leave the menu as it was, click on any other entry in the menu tree without clicking on **Save**.

The remaining group of fields in the Menus page, **Menu Options**, defines the options that are available from the menu and the telephone key that is used to select each action.

Figure 7.   Menu Options page

For each option that you want to include in the menu, fill in the following fields and click **Add** to add the option. The **Current Menu Options** section shows the options that you have already specified.

When designing your menus, remember that some callers may be using older telephones that do not include the **#** and ***** keys.

In the **Choose a filter** field, do not attempt to select the key that you defined as the **Extension prefix** in the **Account Information** page. This key cannot be used in any menus, because it is always interpreted as the prefix for dialing an extension number.

Field	Description
Choose a filter	The key that the user should press to select this option. Click on the field to select from the number keys **0** - **9** or the **#** or ***** keys. In addition, you can select **Timeout** to define the action that will be taken if a user does not press a key within the specified timeout. See **Timeout action** below for more details.

Choose an action	The action that the Auto Attendant should take when the user selects this option. Possible values are:
	• **Announce-Release**
	  Play an announcement and release the call.
	• **Announce-Return**
	  Play an announcement and return to this menu.
	• **Directory**
	  Enter the directory function, where the user can select an extension using dial-by-name.
	• **Menu**
	  Go to another menu.
	• **Menu-Back**
	  Return to the previous menu.
	• **Release**
	  Release the call (hang up).
	• **Transfer**
	  Transfer the call to a specified extension or to a line outside the Business Group.

Announcement ID to play	This field appears only if you selected **Announce-Release** or **Announce-Return** in the **Choose an action** field. Click on the field to select the announcement that is to be played.
Menu ID to jump to	This field appears only if you selected **Menu** in the **Choose an action** field. Click on the field to select the next menu that is to operate.

Field	Description
Extension or external number	This field appears only if you selected **Transfer** in the **Choose an action** field. • To transfer to an extension in the same department as this Auto Attendant, or another Auto Attendant line in this department or in one of its sub-departments, click in the **Select extension** box and select the extension or Auto Attendant line to which the caller is to be transferred. • To transfer to an extension in another department, type the extension number in the second edit box. • To transfer to an external line, type the directory number of the external line in the second edit box. Specify the directory number as a user within this Business Group would dial it: include the external line code if the Business Group requires one, and then the number in 7D, 10D or 1+10D format according to the call type.

If you use the **Directory** action, this allows callers to access any extension in the Business Group using dial-by-name or dial-by-extension; it is not restricted to the extensions that are in the same department as the Auto Attendant line. If you do not want callers to access lines outside this department, do not use the Directory option; instead, set up your Auto Attendant menus to provide direct forwarding to each extension in this department.

3.5.1   Timeout action

In each menu that you create, you should always define the action to be taken if the menu times out: that is, if the user does not press a key within the specified time. For example, you could repeat the menu so that the caller has another chance to check the options and select the right key, or transfer the caller to an operator.

To do this, select **Timeout** in the **Choose a filter** field and specify the appropriate action (with its additional parameter if required).

For menus where there are no valid key presses (for example if your out-of-hours menu simply plays an announcement and does not allow the caller to select any options), you can use the timeout action to determine how the menu operates. For example, you can use **Announce-Return** to play an additional announcement and then repeat until the caller hangs up, **Announce-Release** to play an additional announcement and then hang up, or **Transfer** to transfer the call to an extension with voicemail enabled so that the caller can leave a message.

3.6   Hours/Holidays

The ⊘ Hours/Holidays entry in the menu allows you to define what your normal business hours are and which days are holidays. This allows the Auto Attendant to use the appropriate announcements and menus according to the time and date of the call.

Click on the **Hours/Holidays** entry on the menu. Below this, click on the **Holidays** entry to view or change the current holiday assignments.

Figure 8.   Holiday Date Assignment page

The page displays a calendar for the current year. Any date that is currently assigned as a holiday is shaded in blue.

- To assign a new date as a holiday, click on the date in the calendar. The display changes to show this date shaded in blue.

- To clear a date currently assigned as a holiday, click on the shaded date. The display changes to show this date unshaded.

You can also assign holidays for later calendar years. Click on the **Calendar Year** field at the top of the dialog to select the year.

Click on the **Business Hours** entry below **Hours / Holidays** on the menu to view or change the current business hours assignments.

Figure 9. Business Hours page

Business/Weekend Menu Assignment

Time Zone

Please choose the time zone of this schedule.

America/New_York ▾ Save

Business Hour Definition

Enter the start and end time (24 hour HH:MM) of each business day in the appropriate week day. If the week day is not a business day, leave both the start and end time fields blank.

	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Start Time	8:00	8:00	8:00	8:00	8:00	8:00	8:00
End Time	20:00	20:00	20:00	20:00	20:00	20:00	20:00

Save

12 to 24 hour conversion

Midnight	0:00		Noon	12:00
1 AM	1:00		1 PM	13:00
2 AM	2:00		2 PM	14:00
3 AM	3:00		3 PM	15:00
4 AM	4:00		4 PM	16:00

Field	Description
Time Zone	The time zone in which your Auto Attendant operates. Click on the field to select the appropriate time zone.
Business Hour Definition	The hours on each day of the week that are to be treated as normal business hours. • For each day that is a business day, type the start time and end time for business hours on that day (hours and minutes in 24-hour clock format *hh*:*mm*). For example, if the business is open from 8.30am to 5.15pm, type **08:30** in the **Start Time** field and **17:15** in the **End Time** field. • If the business is open 24 hours and does not close overnight, type **24:00** in the **End Time** field for one day and **00:00** in the **Start Time** field for the next day. • For each day that is not a business day, leave both fields blank. For example, if the business is not open on Sundays, leave both **Start Time** and **End Time** blank under **Sun**. A quick-reference table is shown below the business hours fields to help you convert to 24-hour clock format.

When you have finished setting the time zone or the business hours, click on the **Save** button next to the field you have changed to update the Auto Attendant. To abandon your changes and leave the information as it was, click on any other entry in the menu tree without clicking on **Save**.
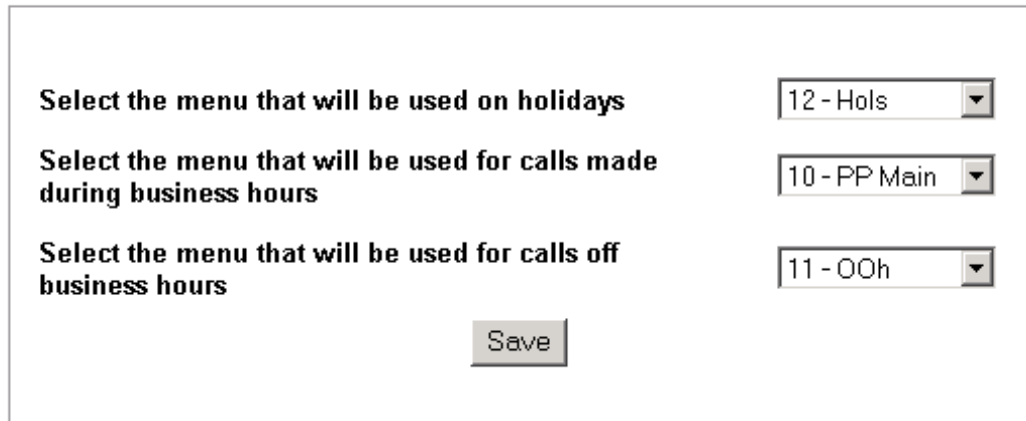
3.7   Menu Assignments

When you have created the menus and announcements, and defined the business hours and holidays, you are ready to assign the menus to be used at any given time (business hours, out of hours on business days, and on holidays). Click on the ⊕ Menu Assignments entry in the menu to do this.

Figure 10. Menu Assignments page

For each of the three times (business hours, out of hours on business days, and on holidays), click on the field to select which menu is to be used.

> ℹ️ If you do not need to have different menus at different times, you can set two or more of these fields to use the same menu. For example, if you want to use a single out-of-hours menu that is the same on holidays and after closing time on business days, specify this menu for both the holiday and out-of-hours options.

When you have finished assigning the menus, click **Save** to update the Auto Attendant. To abandon your changes and leave the menus as they were, click on any other entry in the menu tree without clicking on **Save**.

3.8   Enabling the Auto Attendant

When you have finished assigning the menus, you can now enable the Auto Attendant. Click on the auto attendant number ᴬA to view the Account Information dialog, as described in section 3.3.

Click the checkbox next to **Auto Attendant Status** so that it is checked, and click on **Save** to update the Auto Attendant. From now on, any calls to the Auto Attendant telephone number will be handled using the menus and announcements you have defined.

3.9   Reports

The Auto Attendant can display reports that provide a summary of the menu structure you have set up and the recordings you have created. You can use these reports as a quick check after setting up the Auto Attendant to make sure that everything is configured correctly.
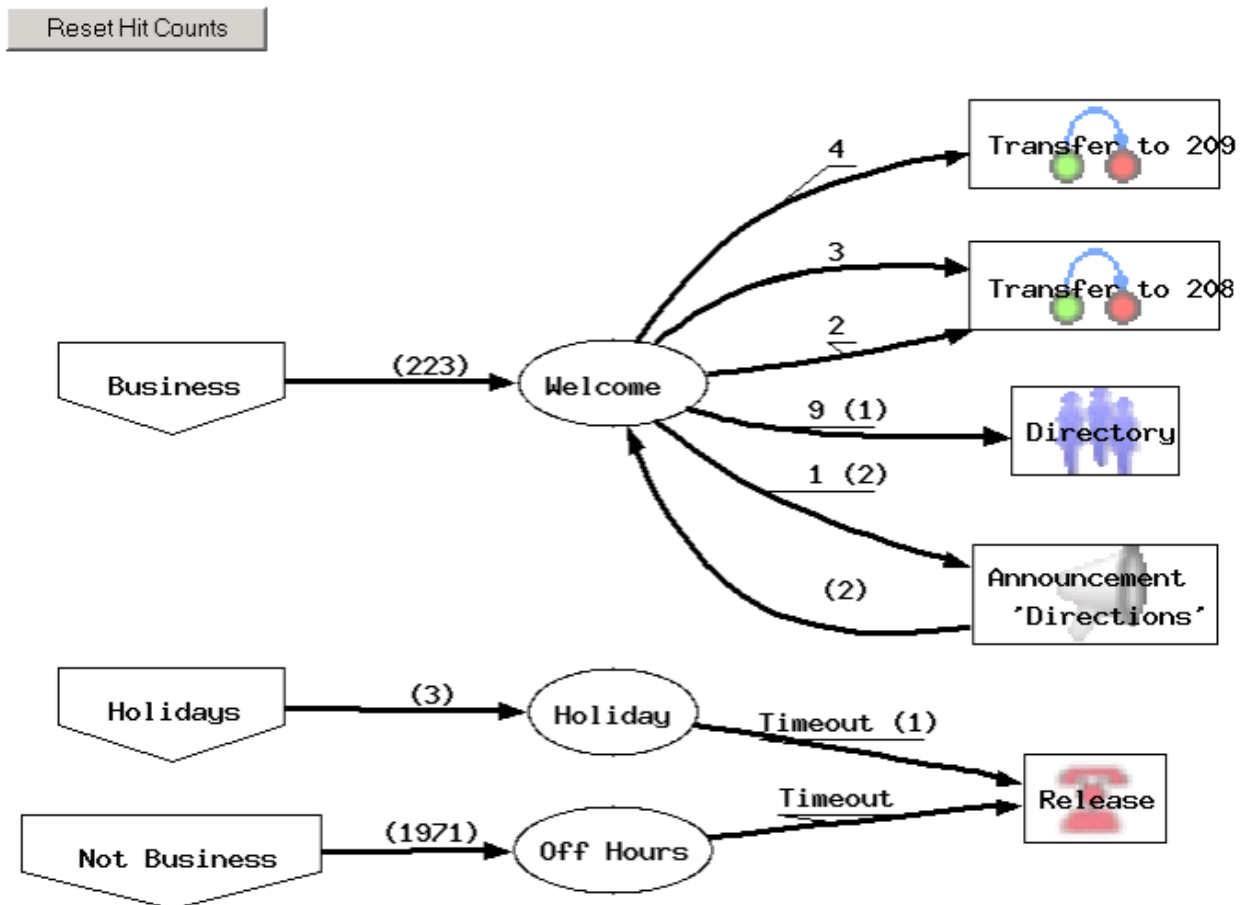
Click on the 🗁 Reports entry in the menu. Below this, click on one of the following:

- 🖼 Layout Diagram to see a summary of the menu structure

- 📼 Recording Report to see a summary of the recordings you have created.

3.9.1   Layout Diagram

Figure 11 shows an example of the Layout Diagram.

Figure 11. Layout Diagram

The layout diagram is a graphical representation of the call flow for the Auto Attendant, including the number of calls that have progressed though each path.

- The shapes on the left of the diagram represent the three date/time filters defined on the **Menu Assignments** page: business hours, holidays, and out of hours.

- In the center of the diagram, ellipse shapes represent the menus used at these times.

- From each menu, an arrow shows the key press for each of the possible options in the menu (or **Timeout** for the timeout option), and leads to a box showing the action taken for that option: for example, transferring to an extension, playing an announcement, or releasing the call.

- If any calls have passed through the paths in the diagram, the number of calls on each path is shown in parenthesis above the arrow for the path.

If the Auto Attendant is running while you are viewing the report, you can use the **Refresh** button on your browser to update the display and show the latest call counts.

The **Reset Hit Counts** button above the diagram resets all of the call counts in the diagram to zero. This means that, next time you view the Layout Diagram, it shows only the calls that occurred after the reset.

3.9.2 Recording Report

The Recording Report provides a list of all announcements and extensions on the Auto Attendant, and highlights those missing an audio recording.

ⓘ You may find this report helpful when you are setting up a new Auto Attendant or adding several extensions, because it acts as a quick check to identify any missing recordings. You can refer to it while using the administrative telephone interface to create the new recordings.

Figure 12. Recording Report page

Announcements

100	**PP Main** For directions to the store, press 1. To place an order, press 3. To speak to the manager, press 4. To dial someone by phone extension, press * followed by the extension number. To dial someone by name, press 9.
101	**PP OOH** Perfect Pizza Out of Hours
102	**PP Hols** Perfect Pizza Holiday
103	**PP Dir** Perfect Pizza Directions
104	**'test** test

Extensions

201	MAIN
202	Al Smith
203	Will Jones
207	

Red highlighting on an announcement or extension indicates a missing recording. In the example above, recordings are missing for one announcement and one extension.

4.   Telephone Admin Interface

The Auto Attendant's **Telephone Admin Interface** allows you to manage the Auto Attendant using your telephone:

- Activate or deactivate the Auto Attendant
- Record and check announcements and the recorded names for extensions
- Test the Auto Attendant menus to ensure that they are operating as you intended
- Change the administrator password for the Telephone Admin Interface.

> In order to use the Telephone Admin Interface, you must use a telephone that includes the **#** (pound) and ***** keys.

To access the Telephone Admin Interface, you will need the following information, which your telephone service provider should give to you.

- The access telephone number of the Telephone Admin Interface
- The telephone number of the Auto Attendant line

You will also need the password assigned to the Auto Attendant line. This is set up in the Business Group Web Interface for the Auto Attendant, as part of the account information, as described in section 3.3.

To use the admin interface, dial the access number. You are then prompted for the Auto Attendant line telephone number and the password. Enter each of these by dialing the appropriate keys on your telephone keypad after each prompt.

4.1   Quick Key Reference

When using the Auto Attendant Administrative interface, there are some keys that have special functions throughout the call to help you navigate through the system. As you become familiar with the system, you do not have to wait for any message to finish if you know which button to press in order to perform a function.

Table 1.   Quick Key Reference

Key	Function
*	Returns to the previous menu. If you are already on the top-level menu, this key simply replays the top-level menu.
# (**pound**)	This key is used to indicate the end of a digit sequence, or to indicate the end of speech when creating recordings.

To exit the telephone admin interface, simply hang up the phone.

The following map provides an overview of the telephone admin interface.

Figure 13.   Administrative telephone navigation map
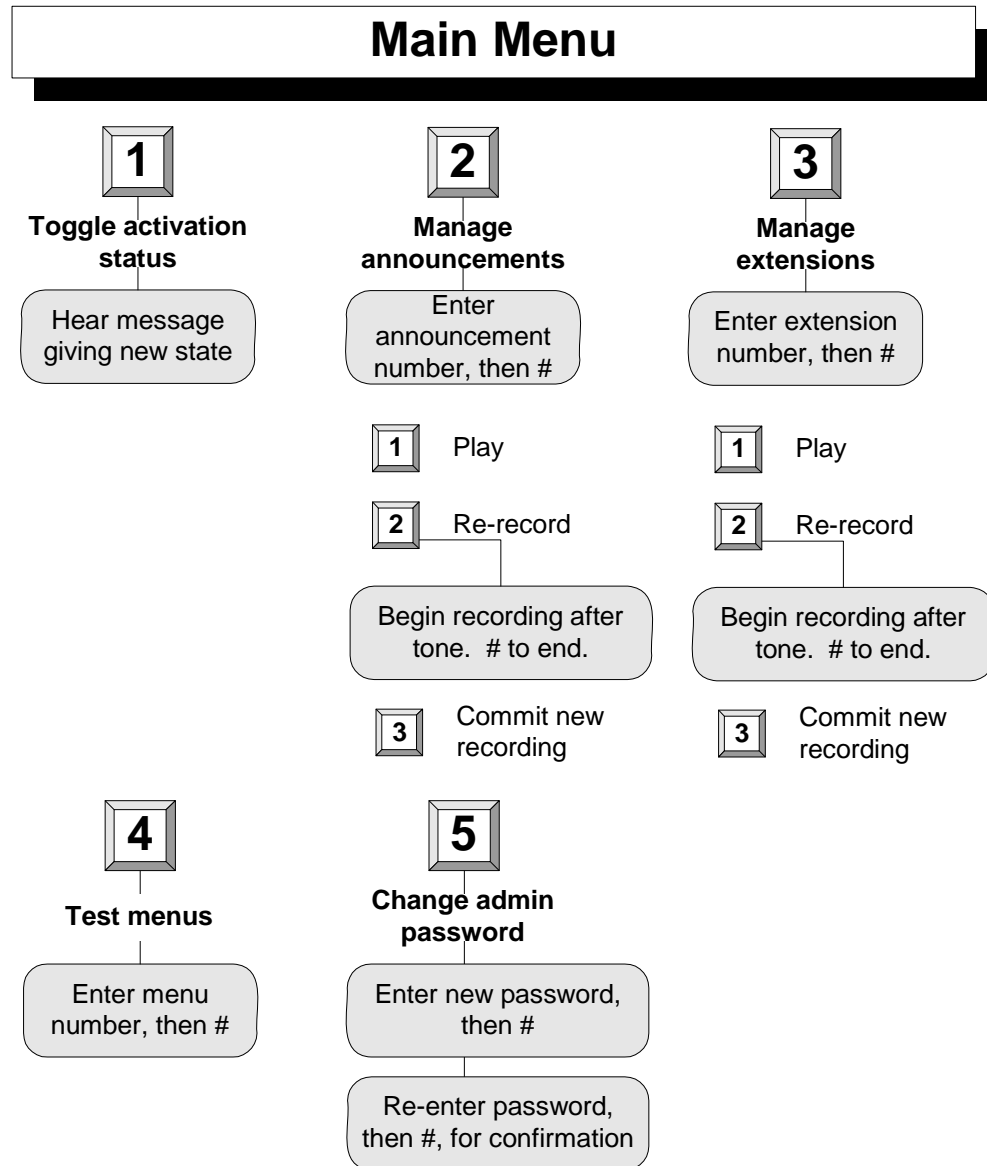
4.2   Activate / Deactivate Attendant

To activate the Auto Attendant if it is deactivated, or to deactivate it if it is active, press **1** at the main menu. The admin interface plays an announcement to confirm the updated status of the system after the key has been pressed.

While it is deactivated, the Auto Attendant simply transfers all calls to the default telephone number set on the Account Information page of the web interface.

4.3   Managing Announcements

In the telephone admin interface, each announcement is identified by its three-digit announcement number as shown in the Announcements page (described in section 3.4). You may find it helpful to have a printout of the **Recording Report** to hand when managing announcements using the telephone admin interface, because this report shows this number and the announcement description for each announcement.

To listen to one of the announcement recordings in the Auto Attendant, and/or to re-record it, press **2** at the main menu. Then type the three-digit announcement number followed by the **#** (pound) key.

You will then hear another menu of options for managing the recording. After using each of these options, you are returned to the same menu until you press **#** to finish and return to the top-level menu.

- To play the current announcement recording, press **1**.

- To record a new announcement recording, press **2**. Wait for a tone, then speak into the telephone to record the new announcement, and press **#** when you have finished. You can then press **1** to hear the new announcement you have just recorded.

- To commit the new announcement recording that you have just created, press **3**. The new recording replaces the previous recording for this announcement.

- To return to the top-level menu without committing the new announcement recording, press **#**. The previous recording is left unchanged.

After you have recorded a new announcement using option **2**, pressing **1** plays the new recording. However, this new recording is not used in the Auto Attendant until you press **3** to commit it and replace the previous recording. This means that you can experiment with announcement recordings without affecting the working Auto Attendant.

4.4   Managing Extension Name Recordings

Each extension is identified by its extension number, as described in section 3.2, **Extensions**. You may find it helpful to have a printout of the **Recording Report** to hand when managing extension name recordings using the telephone admin interface, because this report shows this number and the extension name for each extension.

The Telephone Admin Interface allows you to manage the recorded names of extensions that are in the same department as the Auto Attendant line, or in sub-departments of this department. It does not allow you to hear or record names for extensions in other departments.

To access recorded names for all extensions, you need to log in to the telephone admin interface using the number of an Auto Attendant line in the top-level Business Group. Alternatively, you can record the names on your PC, and use an administrator line for the top-level Business Group to upload them using the Business Group Web Interface.

To listen to one of the extension name recordings in the Auto Attendant, and/or to re-record it, press **3** at the main menu. Then type the extension number followed by the **#** (pound) key.

You will then hear another menu of options for managing the recording. After using each of these options, you are returned to the same menu until you press **#** to finish and return to the top-level menu.

- To play the current extension name recording, press **1**.

- To record a new extension name recording, press **2**. Wait for a tone, then speak into the telephone to record the new extension name, and press **#** when you have finished. You can then press **1** to hear the new extension name you have just recorded.

- To commit the new extension name recording that you have just created, press **3**. The new recording replaces the previous recording for this extension name.

- To return to the top-level menu without committing the new extension name recording, press **#**. The previous recording is left unchanged.

After you have recorded a new extension name using option **2**, pressing **1** plays the new recording. However, this new recording is not used in the Auto Attendant until you press **3** to commit it and replace the previous recording. This means that you can experiment with extension name recordings without affecting the working Auto Attendant.

4.5   Testing Menus

The telephone admin interface provides the facility to simulate the menus in your Auto Attendant, so that you can follow the different options and test that the menus are working correctly. You can use the telephone keys to navigate the menus in the same way that you would if you dialed the Auto Attendant number directly. The only difference is that the testing interface does not transfer or terminate your call where the normal menu interface does so, but instead returns you to the previous menu so that you can continue testing.

To access this facility, press **4** at the main menu. Then type the two-digit menu number of the menu you want to test, followed by the **#** (pound) key.

At this point, you will hear the announcement for the selected menu. From here you can press the appropriate telephone key for each option in the menu to test your attendant.

If the attendant reaches a point where the call would normally be released or transferred, it plays a series of tones followed by an announcement of the action that would be taken in the real menu system at this point. You then return to the previous menu in case you want to continue testing from that point.

To end the test, simply end the call to the telephone admin interface.

4.6   Changing the Administrator Password

To change the password used to access the telephone admin interface, press **5** at the main menu.

You are prompted to enter the new password. Type a string of digits 0-9, which must be four digits long, followed by the **#** (pound) key.

You are then prompted to enter the new password again for verification. Type the same digit string again, followed by the **#** key.

You then return to the main menu.

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