

EASY AND PREMIUM ATTENDANT GUIDE



1 Auto-Attendant – Easy Attendant / Premium Attendant

1.1 Overview

MetaSphere EAS provides two solutions for Auto Attendant functionality.

- Easy Attendant offers a very simple automated telephone menu.
 - Callers to a business are directed to the automated TUI, providing key options to transfer to specific departments or individuals in the business, to transfer to a voicemail account directly, or to listen to a recorded announcement.
 - You can choose to either have a single menu that plays when Easy Attendant is turned on, or two different menus for business and non-business hours that are used according to a pre-defined schedule.
 - When Easy Attendant is turned off, you can either forward callers to another telephone number or play a message informing the caller that your business is currently closed.
- Premium Attendant, aimed at small and medium business subscribers, offers an increased level of service compared to Easy Attendant.
 - In addition to all the features offered by Easy Attendant, Premium Attendant allows multiple menus with a finer scheduling control.
 - It also includes more call handling options, such as Voicemail by Name and Voicemail by Extension, as well as greater control over the actions taken for any given key press.

Both Easy and Premium Attendant can also be configured to allow callers to dial an extension at any point in the menu and not just on a Dial by Extension menu option. If you want to use this option, you must enable it as described in 1.2.4 and you should also ensure that your initial greeting mentions the option that a caller who knows the extension they require can dial it immediately.

1.2 Easy Attendant

This section outlines the required steps for configuring Easy Attendant.

1.2.1 Planning your Easy Attendant

Before you start to set up your Easy 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.

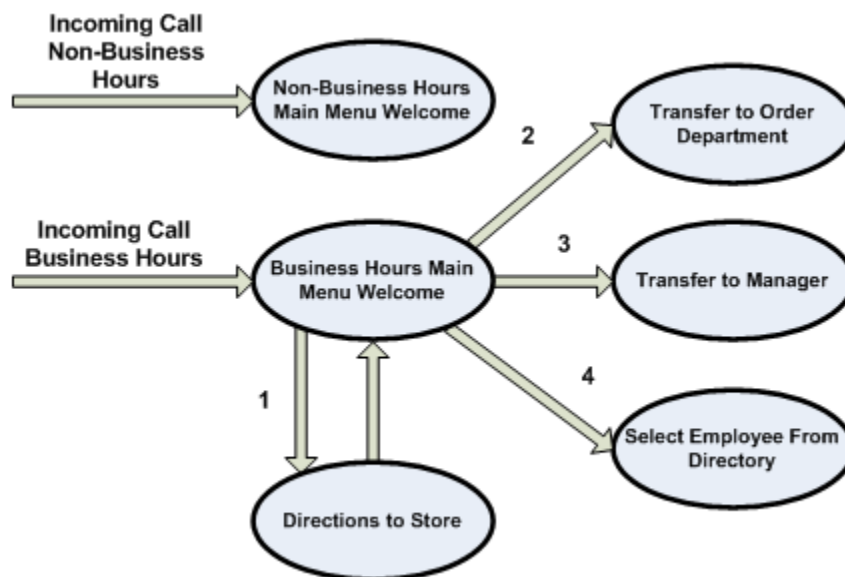
Place an order with a server.

Speak to the manager.

Speak to another employee using dial-by-name.

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

M Figure 1: Easy Attendant call handling example



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. This is because this option is playing a recording. The other options do not allow the return to the menu.

For out-of-hours and holiday operation, Easy Attendant may 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.

1.2.2 Logging on to Easy Attendant

To configure your Easy Attendant, log into the Easy Attendant, following these steps:

- From the BG Administrator portal, select *Lines* and then click the *Individual Line* icon on the far right side of the page. As an alternative, you can access the CommPortal user login screen and enter the Easy Attendant Number and Password.
- If this is the first time you have logged in, or if no Easy Attendant configuration has yet been set up, you will see a Welcome screen.

M Figure 2: Easy Attendant Welcome screen

Welcome to Easy Attendant

Easy Attendant answers your calls and plays an automated menu with options that you define. To start using the service please select from the following two options:

- Use a Schedule**
Different options during business hours and non-business hours.
- Use a Simple Menu**
Same options at all times.

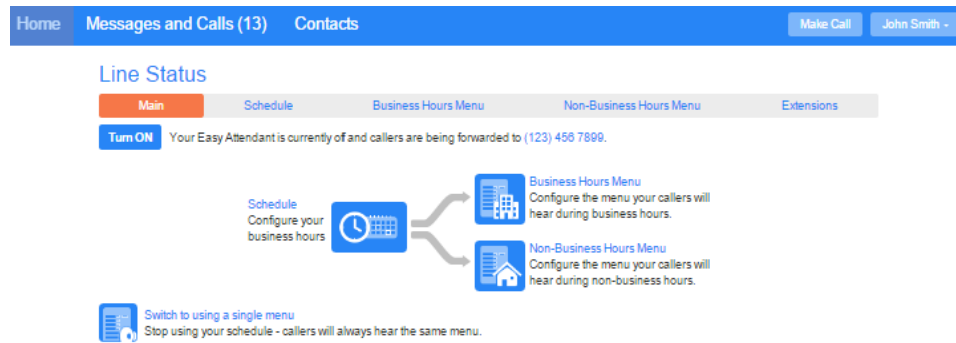
Note: you can switch between these options later if your requirements change.

Continue...

- Use the radio buttons to select either a scheduled menu for business hours and non-business hours or a simple menu that will be played whenever Easy Attendant is turned on, and press **Continue**. (You can change this later if you need to.)
- The screen then displays the Easy Attendant portal.
- This screen enables you to
 - turn your Easy Attendant on and off (Easy Attendant must be turned off while you are configuring it)
 - configure your Easy Attendant menus
 - set the Schedule, if you are using different menus for business hours and non-business hours.

If you selected to use a single menu, this screen will have a single Easy Attendant Menu tab.

M Figure 3: Easy Attendant Portal

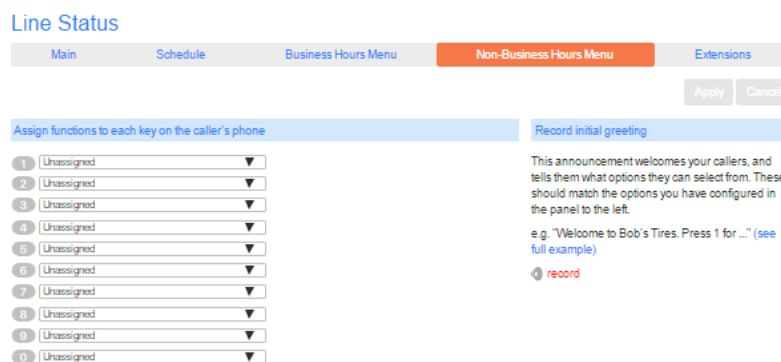


1.2.3 Configuring Easy Attendant menus and schedules

You should now begin configuring your Easy Attendant menu(s) and schedules.

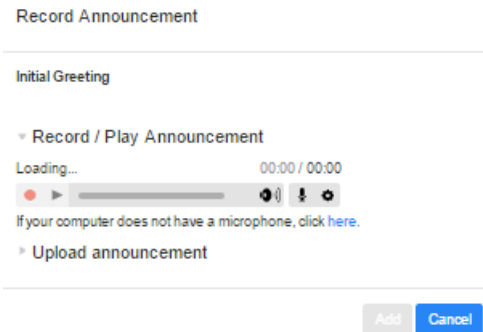
- Select either the Business Hours Menu tab or, if you are using a single menu, the Easy Attendant Menu tab.
- First, set up your Easy Attendant by recording the initial greeting.
 - If you are using the Dial By Extension At Any Time option, you should ensure that this initial greeting includes the option for a caller to dial an extension immediately if they know the extension number of the person or department they want to reach.

M Figure 4: Recording an initial greeting



- Select the *record* option on the lower right of the screen. This launches the announcement recorder, where you can either record an announcement, or upload a pre-recorded announcement.

M Figure 5: Announcement recorder



- Once you have recorded or uploaded your initial greeting, you can return to the Menu tab.
- Now you are ready to define the specific menu items as defined in your plan to one of the following options.
 - Play Announcement
 - Transfer to Phone
 - Transfer to VoicemailDial by Extension
 - Dial by Name
- If you are using a different menu for non-business hours, you should now set up the initial recording and configure the menu options on the Non-Business Hours Menu tab.
- Next you will need to establish your working hours by selecting the *Schedule* tab. Once in the Schedule screen, click on the *Business Hours* key and then click in the calendar and while holding down the left mouse button drag the mouse across the calendar to indicate the business hours. In the example below, the business hours are Monday – Friday from 9:00 am until 5:00 pm. Any other time are considered non-working hours.

M Figure 6: Easy Attendant Schedule tab

Line Status

Main **Schedule** Business Hours Menu Non-Business Hours Menu Extensions

Apply Cancel

Configure your business hours by clicking on the appropriate cells in the grid. Click and drag to select multiple cells.

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
1 am							
2 am							
3 am							
4 am							
5 am							
6 am							
7 am							
8 am							
9 am							
10 am							
11 am							
12 pm							
1 pm							
2 pm							
3 pm							
4 pm							
5 pm							
6 pm							
7 pm							
8 pm							
9 pm							
10 pm							
11 pm							

Special Days

Configure days when your normal weekly schedule does not apply, for example vacations. On these days, your non-business hours menu will be played all day.

Zoom In

Key: Business Hours Non-Business Hours

- Next you will need to select any non-working days such as holidays by clicking on the calendar icon in the Special Days section of the Schedule page. You can choose individual non-working days by clicking on the date in the calendar, or you can use the *Choose Public Holidays* option to automatically add public holidays for your region.

M Figure 7: Special Days

Configure days that will be your special days.

During special days, your Non-Business Hours menu will be active.

Click a date on the calendar to make it a special day, or click an existing special day to make it normal again. You can also click and drag to change several days at once.

April 2017 May 2017 June 2017

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
				1	2		1	2	3	4	5	6	7							
3	4	5	6	7	8	9	8	9	10	11	12	13	14	5	6	7	8	9	10	11
10	11	12	13	14	15	16	15	16	17	18	19	20	21	12	13	14	15	16	17	18
17	18	19	20	21	22	23	22	23	24	25	26	27	28	19	20	21	22	23	24	25
24	25	26	27	28	29	30	29	30	31					26	27	28	29	30		

Go To Today Clear All Add Public Holidays Ok Cancel

1.2.4 Configuring your Easy Attendant extensions

If you will be using "Dial by Name", then you will need to define which extensions will participate in dial by name and record the names of users in the extensions tab. Additionally, if you want to use the **Dial By Extension At Any Time** option, you must configure it here.

M Figure 8: Easy Attendant Extensions tab

Extension	Name	Telephone Number	Department	Included?	Spoken Name
<input checked="" type="checkbox"/>	Sans Intercom	(501) 901 1007	MetaSwitch EAS		record
<input type="checkbox"/>	1055 Jim	(501) 901 1003	MetaSwitch		record
<input type="checkbox"/>	654 Mike	(501) 901 1000	MetaSwitch		override
<input type="checkbox"/>	655 Jim	(501) 901 1001	MetaSwitch	✓	listen/change

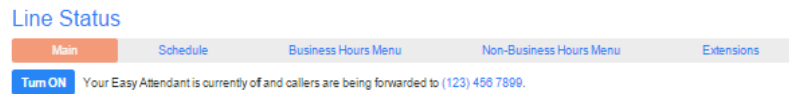
New Business Group Extensions will be automatically excluded
Callers are allowed to dial by extension at any time

- The *Callers are allowed to dial by extension at any time* link at the foot of the screen means that callers can dial an extension at any point in the Easy Attendant menu and not just on a Dial by Extension menu option. If you want to restrict dial by extension to Dial by Extension menu options only click on this link. It will now display that *Callers are allowed to dial by extension only after selecting "Dial by Extension" menu option*.
- To include or exclude an extension from dial by name, select the extension(s) by ticking the checkbox on the left of each extension and then click either *Include Selected* or *Exclude Selected*.
- To record the user's name click on the **record** link for the user. If a name has already been recorded, this link will display **listen/change**.
- To record names to be used for dial by name, click the record icon. If the spoken name has already been created, the screen will show listen/change rather than record, and you can click this link to hear the existing recording and change it if you need to.
- Use this recording interface to record the name or upload a spoken name recording, and click the *Save* button.

1.2.5 Activating Easy Attendant

The final step in this process is to activate your Easy Attendant by clicking the *Turn On* button from the Main Tab. Your Easy Attendant is now active.

M Figure 9: Turn Easy Attendant On button



1.3 Premium Attendant

This section outlines the required steps for configuring the Premium Attendant.

1.3.1 Planning your Premium Attendant

Before you start to set up your Premium 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 sales company may include the following options:

- Have a scheduled Attendant.

- Provide a main menu for business hours that provides the companies default greeting and menu.

- Have the ability to transfer to a sales menu that provides additional menu options.

- Transfer to speak with the Billing department.

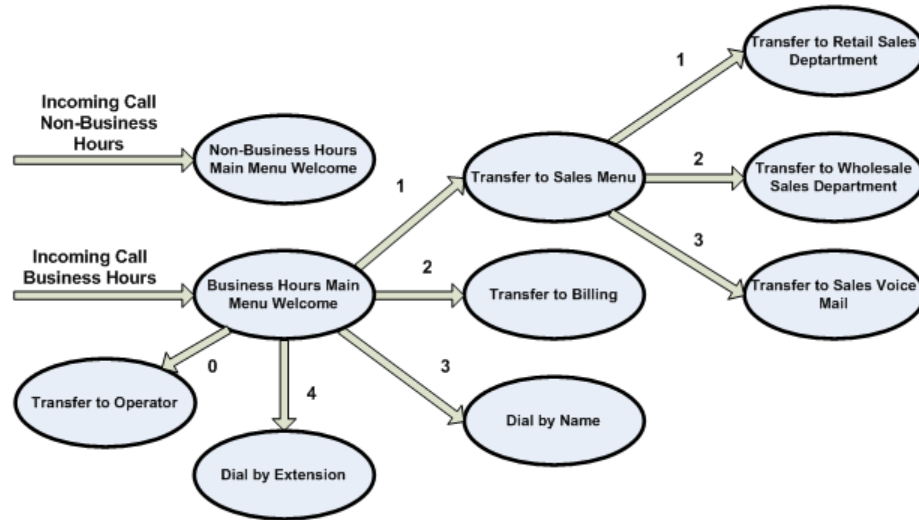
- Dial by name.

- Dial by extension.

- Transfer to an operator.

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

M Figure 10: Premium Attendant call handling example



For out-of-hours and holiday operation, Premium Attendant may provide an announcement, for example saying that the business is closed, (without allowing the caller to select any options), or it may provide an alternative set of menu options.

1.3.2 Logging into Premium Attendant

To configure your Premium Attendant log into the Auto-Attendant, following these steps:

From the BG Administrator portal, select *Lines* and then click the *Individual Line icon* on the far right side of the page. As an alternative, you can access the CommPortal user login screen and enter the Premium Attendant Number and Password. The screen then displays the Premium Attendant portal.

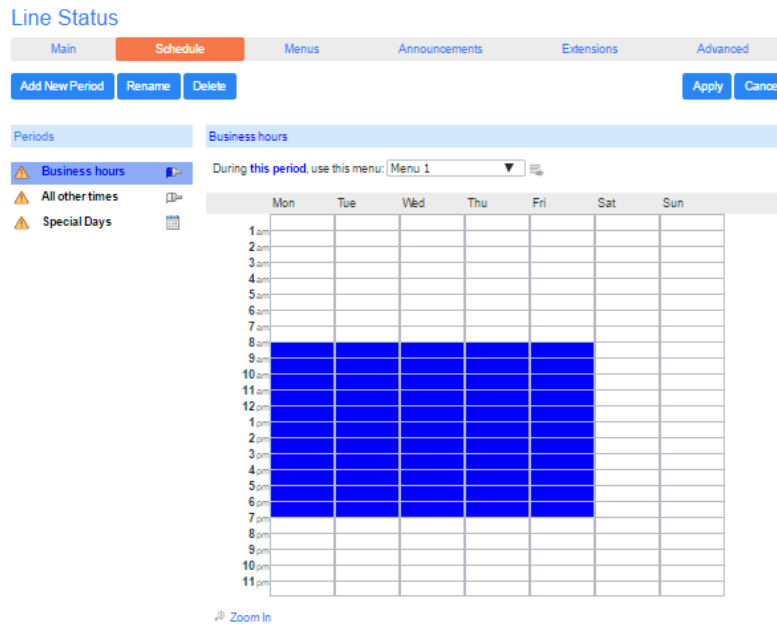
M Figure 11: Premium Attendant Portal

The screenshot shows the Premium Attendant Portal interface. At the top, there is a navigation bar with 'Home', 'Messages and Calls (13)', and 'Contacts'. On the right side of the navigation bar, there are buttons for 'Make Call' and 'John Smith -'. Below the navigation bar, the 'Line Status' section is active, with sub-tabs for 'Main', 'Schedule', 'Menus', 'Announcements', 'Extensions', and 'Advanced'. The 'Main' tab is selected, showing the 'Activation Status' and 'Service Status' sections. The 'Activation Status' section indicates that the Premium Attendant is currently off and callers are being forwarded to (123) 456 7899, with a 'Turn ON' button. The 'Service Status' section indicates that no menus are currently being played to callers, as the Premium Attendant is turned off. A warning icon is present, and a message states: '2 schedule periods have not been assigned menus. 1 referenced menu is empty or contains errors. 1 referenced announcement is missing audio.' On the right side of the 'Main' tab, there are four configuration options: 'Configure your weekly schedule and holidays, so that different menus can be played based on time and day.', 'Define the menus that your callers will be offered, and the actions they can choose from.', 'Record the announcements your caller will hear.', and 'Manage the extensions your caller can transfer to.'

1.3.3 Configuring Premium Attendant Schedule

You can configure your weekly schedule by clicking on the *Weekly Schedule and Holidays* icon. Once in the Schedule screen, click on the *Business Hours* key and then click in the calendar and, while holding down the left mouse button, drag the mouse across the calendar to indicate the business hours. In the example below, the business hours are Monday – Friday from 9:00 am until 5:00 pm. Any other time are considered non-working hours.

M Figure 12: Premium Attendant Schedule tab



Next you will need to select any non-working days such as holidays by clicking on the calendar icon in the Periods section of the Schedule page. You can choose individual non-working days by clicking on the date in the calendar, or you can use the *Choose Public Holidays* option to automatically add public holidays for your region.

M Figure 13: Premium Attendant Special Days

Line Status

Main Schedule Menus Announcements Extensions Advanced

Add New Period Rename Delete Apply Cancel

Periods Special Days

⚠ Business hours ⏪ During this period, use this menu: Select Menu... ⏩

⚠ All other times ⏪ Click a date on the calendar to make it a special day or click an existing special day to make it normal again

⚠ Special Days 📅

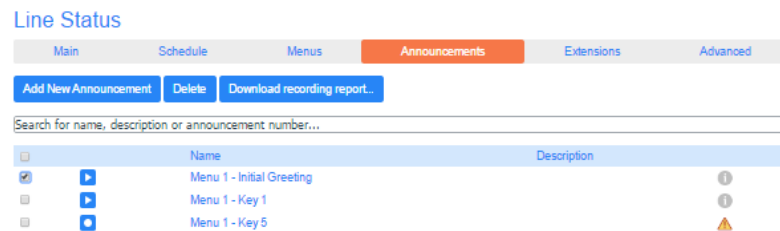
April 2017							May 2017						
Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
					1	2	1	2	3	4	5	6	7
3	4	5	6	7	8	9	8	9	10	11	12	13	14
10	11	12	13	14	15	16	15	16	17	18	19	20	21
17	18	19	20	21	22	23	22	23	24	25	26	27	28
24	25	26	27	28	29	30	29	30	31				

Go To Today Clear All Add Public Holidays

1.3.4 Configuring Premium Attendant Announcements

In order to use your Premium Attendant you will need to record or upload the announcements that will be played as either your primary Business Hours or Non-Business Hours greeting as well as any other recorded announcements required. The example in section 1.3.1 would require three announcements, one each for Business Hours, Non-Business hours and the Sales menu. Click in the Announcements tab to begin configuration.

M Figure 14: Premium Attendant Announcements tab



Click the *Add New Announcement* button and then follow the steps below.

M Figure 15: Add Announcement

The screenshot shows the 'Add Announcement' form. It has a title 'Add Announcement' and a horizontal line below it. There are two input fields: 'Name:' and 'Description:'. The 'Description:' field has a placeholder text 'Enter optional description...'. Below the input fields is a dropdown menu labeled 'Record / Play Announcement' with a downward arrow. Below the dropdown is a media player interface showing 'Loading...' and a progress bar with '00:00 / 00:00'. The media player has a red record button, a play button, a volume icon, and a settings icon. At the bottom of the form are two buttons: 'Add' and 'Cancel'.

Enter the name and description of your announcement.

To record your announcement using a microphone or headset connected to your computer, click the red record button.

When you have finished recording, press the stop button and click on the *Add* button at the bottom of the interface.

To upload pre-recorded announcements, select *Upload Announcement* from the drop-down menu on the announcement recorder and browse to the location of your announcement and click upload. After your upload has completed click the *Add* button.

M Figure 16: Uploading an Announcement

Menu 1 - Key 5

Name:

Description:

Record your announcement and upload it below valid formats are: G711 WAV (8-bit, ulaw / alaw, mono, 8kHz), 16-bit PCM WAV (16-bit, PCM, mono, 16kHz).

New file: No file chosen

Current file: No file currently uploaded

To record the announcement using your telephone, do the following.

Create the announcement by adding a name and description and selecting *Record By Phone* from the drop-down menu.

Make a note of the announcement number and then click on the *Add* button.

Dial the main number for your Premium Attendant service provided by your service provider, enter the number for your Premium Attendant, enter the pin and then follow the prompts to record your announcement using the announcement number noted in the previous step.

M Figure 17: Recording Announcements by Phone

Menu 1 - Key 5

Name:

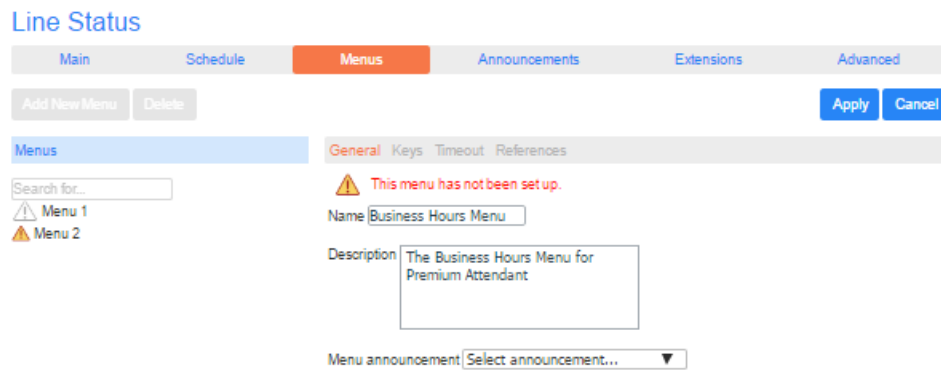
Description:

To record this announcement, dial your Premium Attendant access number, and follow the prompts to edit announcements. Enter the announcement number when prompted.

1.3.5 Configuring Premium Attendant Menus

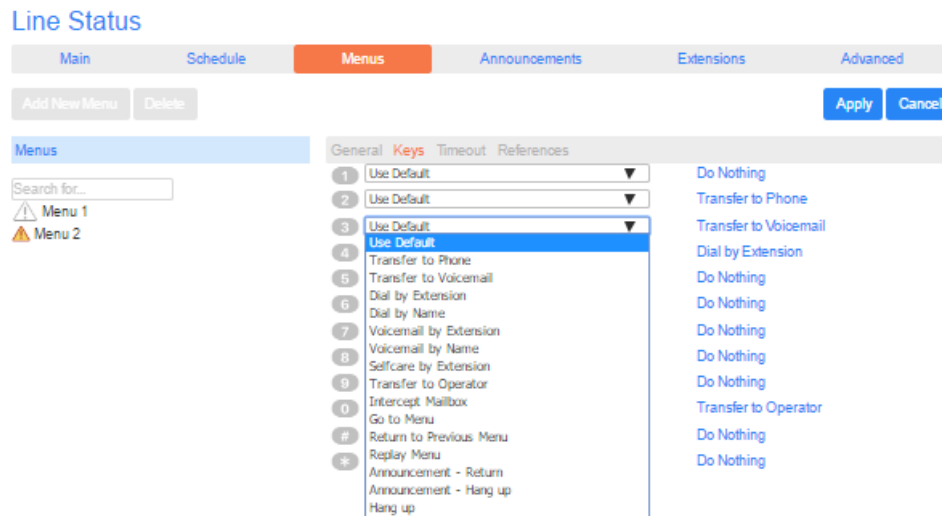
Next you will need to set up your Premium Attendant menu options. By default, there are two menus defined in Premium Attendant. These could be used as your main business hours menu and you main non-business hours menu. You can add additional menus as required by clicking the *Add* button.

M Figure 18: Premium Attendant Menus tab



- Begin to configure your menu by providing a name and description and selecting the Menu announcement to be used by this menu, and then click *Apply*.
- Next you will need to configure the action for each key pressed for your menu by selecting the *Keys* link and then selecting an option using the dropdown menus for each key pressed in the menu.

M Figure 19: Premium Attendant key configuration menu



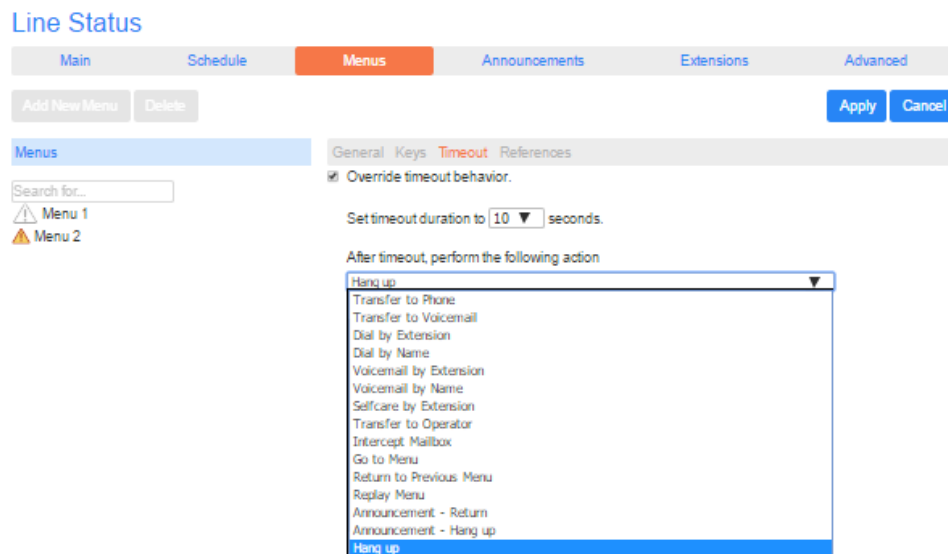
The options available for each key are as follows:

- Use Default (This option is default for all keys for new menus)
- Transfer to Phone
- Transfer to Voicemail (CoS controlled)
- Dial by Extension (CoS controlled including whether an announcement is automatically played giving initial instructions when this key is pressed, or whether these instructions must be recorded by the subscriber in the menu announcement)

- Self-care by Extension (CoS controlled, allows subscribers with mailboxes only identified by extension numbers to dial in to their mailbox)
- Dial by Name (CoS controlled)
- Voicemail by Extension (CoS controlled)
- Voicemail by Name (CoS controlled)
- Transfer to Operator (CoS controlled, and only available for Premium Attendants in a Business Group)
- Intercept mailbox (CoS controlled)
- Go to Menu
- Return to Previous Menu
- Replay Menu
- Announcement – Return
- Announcement – Hang up
- Hang up

Next, you will need to configure the timeout behavior of your menu to address callers that do not press a key in this menu. Enter the timeout duration and the timeout behavior from the dropdown list as seen below and click *Apply*.

M Figure 20: Premium Attendant timeout configuration menu



1.3.6 Configuring Premium Attendant extensions

If you plan on using dial by name or dial by extension, you will need to select the extensions and record a name for the dial by name.

M Figure 21: Premium Attendant Extensions tab

Line Status

Main Schedule Menus Announcements **Extensions** Advanced

Business Group Extensions Additional Extensions

Include Selected Exclude Selected

Search for entry by extension, name, department or telephone number...

<input type="checkbox"/>	Extension	Name	Telephone Number	Department	Included?	Spoken Name
<input type="checkbox"/>		Sans Interroom	(501) 901 1007	MetaSwitch EAS	✓	record
<input checked="" type="checkbox"/>	*655	Jim	(501) 901 1003	MetaSwitch	✓	record
<input type="checkbox"/>	654	Mike	(501) 901 1000	MetaSwitch	✓	override
<input type="checkbox"/>	655	Jim	(501) 901 1001	MetaSwitch	✓	listen/change

New Business Group Extensions will be automatically excluded
 Callers are allowed to dial by extension only after selecting "Dial by Extension" menu option

The procedure for configuring your Premium Attendant extensions is the same as for Easy Attendant, as described in 1.2.4.

1.3.7 Configuring Premium Attendant advanced options

In order to configure the advanced settings for your Premium Attendant, click on the *Advanced* tab and define the default handling for each key press. These actions will be available to callers in all menus unless you assign an alternative action to the key in the per menu configuration.

M Figure 22: Premium Attendant Advanced Settings tab

Line Status

Main Schedule Menus Announcements Extensions **Advanced**

Default keys Error handling Other settings

Apply Cancel

This page allows you to configure default actions for each key that a caller can press.

These actions will be available to callers in all menus unless you assign an alternative action to the key in the per menu configuration.

1	Do Nothing	
2	Transfer to Phone	(987) 654 3210
3	Transfer to Voicemail	(987) 654 3211
4	Dial by Extension	?
5	Do Nothing	
6	Do Nothing	
7	Transfer to Phone	e.g. (123) 456 7890
8	Do Nothing	
9	Do Nothing	
0	Transfer to Operator	? 29305
#	Do Nothing	
*	Do Nothing	

Next, click on the *Error Handling* link and set the value and behavior for Timeout, Call Transfers, Unknown Input and Invalid Extensions.



M Figure 23: Premium Attendant Error Handling menu

The screenshot shows the 'Advanced' configuration page for Premium Attendant Error Handling. It features a navigation bar with tabs: Main, Schedule, Menus, Announcements, Extensions, and Advanced (highlighted in orange). Below the navigation bar, there are three sub-sections: 'Error handling' (highlighted in orange), 'Default keys', and 'Other settings'. The 'Error handling' section is divided into four panels: 'Timeout', 'Call Transfer', 'Unknown Input', and 'Invalid Extension'. Each panel contains configuration options such as dropdown menus, text inputs, and radio buttons. For example, the 'Timeout' panel has a dropdown for 'Menu time out' set to 10 seconds and a dropdown for 'Intercept Mailbox' set to '(020) 812 3123'. The 'Call Transfer' panel has a dropdown for 'Ring' set to 'for 45 seconds' and a dropdown for 'If a call transfer fails' set to 'Return to the menu'. The 'Unknown Input' panel has a dropdown for 'If the caller selects an unassigned key' set to 4 times and a dropdown for 'Hang up'. The 'Invalid Extension' panel has a dropdown for 'If the caller dials an invalid extension' set to 1 times and a dropdown for 'Announcement - Hang up'. There are 'Apply' and 'Cancel' buttons at the top right of the configuration area. A warning icon (a yellow triangle with an exclamation mark) is visible at the bottom right of the 'Invalid Extension' panel.

1.3.8 Activating Premium Attendant

Finally, you will need to activate your Premium Attendant by going to the Main page and selecting the Turn On button.

The Premium Attendant interface uses the following error messages and icons to alert you to incorrect or missing configuration. These are produced on page load, and are not updated dynamically.

- The Main tab has a Service Status panel that states your current schedule period and the menu that callers will hear. It also reports if you have errors in any menus, or one or more announcements is missing audio.
- The Schedule and Menus pages use a banner line to report any errors.
- The following icons are used to indicate incorrect or incomplete configuration
 -  error icon
 -  warning icon

If there are any errors in your configuration, you will be warned against turning on Premium Attendant, and in some cases this will be prohibited. You should therefore resolve the configuration errors before attempting to turn Premium Attendant on.