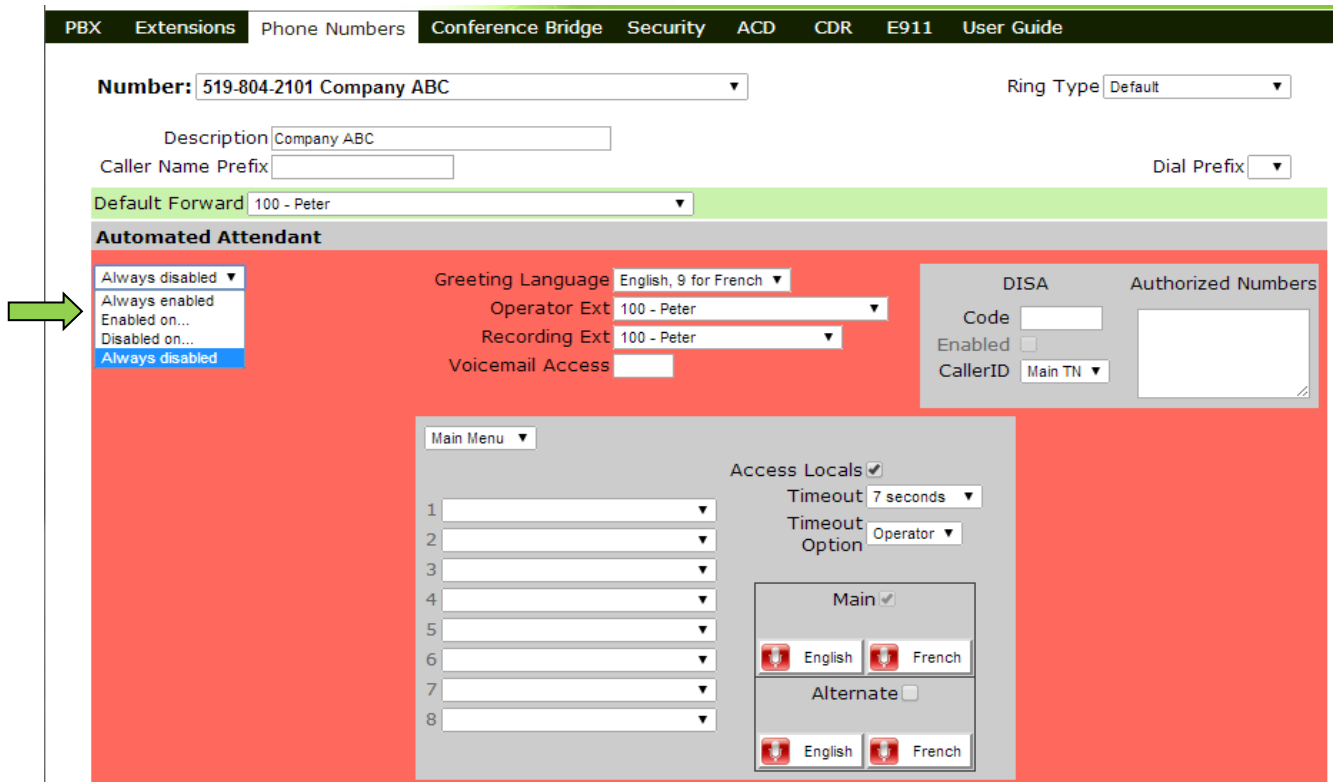


## 4.0 Automated Attendant

### Section 4.1 – Intro to Setting Up Auto Attendants (Auto-Attendant)

An Automated Attendant can be set up to answer incoming calls, play greetings that you create, and establish prompts to allow callers to specify who or what they looking for. This section of the screen allows you to configure an attendant, record the prompts and enable other features. To enable the auto-attendant, select the appropriate scheduling option from the drop-down menu on the top left of the *Auto-Attendant* section.

**Auto Attendant Scheduling options are as follows:**



The screenshot shows the configuration page for an Automated Attendant. At the top, there is a navigation bar with tabs: PBX, Extensions, Phone Numbers, Conference Bridge, Security, ACD, CDR, E911, and User Guide. Below this, the 'Number' field is set to '519-804-2101 Company ABC' and the 'Ring Type' is 'Default'. The 'Description' is 'Company ABC' and the 'Caller Name Prefix' is empty. The 'Default Forward' is set to '100 - Peter'. The 'Automated Attendant' section is highlighted in red and contains several settings:

- Scheduling:** A dropdown menu is open, showing options: 'Always disabled' (selected), 'Always enabled', 'Enabled on...', 'Disabled on...', and 'Always disabled'.
- Greeting Language:** 'English, 9 for French'.
- Operator Ext:** '100 - Peter'.
- Recording Ext:** '100 - Peter'.
- Voicemail Access:** Empty field.
- DISA:** Code, Enabled (checkbox), and CallerID (Main TN).
- Authorized Numbers:** Empty text area.
- Main Menu:** A list of 8 menu items, each with a dropdown arrow.
- Access Locals:** Checked checkbox.
- Timeout:** 7 seconds.
- Timeout Option:** Operator.
- Main:** Checked checkbox, with buttons for English and French.
- Alternate:** Unchecked checkbox, with buttons for English and French.



Attribute	Description
<b>Always Enabled</b>	This enables the Automated Attendant and disables the Default Forward on a permanent basis. The background colour of the Automated Attendant will change to green to reflect the changes.
<b>Enabled On...</b>	This enables the Automated Attendant and disables the Default Forward on a scheduled basis. The background colour of the Automated Attendant will change to yellow, and additional scheduling options will appear.
<b>Disabled On...</b>	This disables the Automated Attendant and enables the Default Forward on a scheduled basis. The background colour of the Automated Attendant will change to a reddish colour, and additional scheduling options will appear.
<b>Always Disabled</b>	<p>This disables the Automated Attendant and enables the Default Forward on a permanent basis. The background colour of the Automated Attendant will change to a reddish colour to reflect the changes.</p> <p><b>IMPORTANT NOTE:</b> If an Auto Attendant is not used in typical call answer but may be called up as part of a call flow, an Auto Attendant may be enabled and set up and then "disabled" preserving all functions. This allows a "disabled" Auto Attendant that may not be required to answer an incoming line to be called up in a call flow. Disabling does not deactivate the Attendant; it simply disables it from immediately answering the incoming call. An example of when this might be used is if a company has their calls answered live during business hours but for some reason or another no one can answer after a specific amount of rings, you can ask the system to then follow the Auto Attendant that you recorded so that the caller has options to then choose from.</p>





When *Enabled On...* or *Disabled On...* are selected, the following scheduling options appear and can be set in 15 minute increments:

Select the appropriate start time for each day in the left hand drop-down menu. Then select the appropriate end time in the right hand menu. Selecting *All Day* for the start time disables the end time since the schedule is valid for the full day. Selecting a blank start time disables the schedule for the day. For the ending times, only times later than starting times are shown, and the *End of Day* option denotes that the schedule is in effect until midnight. The schedule for the Auto Attendant works identically to the schedule for the Alternate Dial Sequence covered earlier in the Extensions section.

If using schedule (as in the screen shot on the previous page) it is important to note that outside of the scheduled hours, the systems calls will flow as per the setting applied beside



the Default Forward section of the screen. In the case above, before 9:00 a.m. and after 5:00 p.m. and all day Saturday and Sunday, calls would go to the companies General Voicemail Box (Ext. 900).

The automated attendant features are as follows:

Attribute	Description
<b>Greeting Language</b>	<b>Your PBX is capable of voice greetings in both French and English. Use this drop-down menu to select the default and alternate languages. The number 9 is reserved in the Auto Attendant Menu to allow selection of the Alternate Language if set up.</b>
<b>Operator Extension</b>	<b>This is the extension that is dialed when "0" is pressed from the automated attendant. The default setting for this is the first extension in your list and may be set independently from any other numbers Operator extension answered separately from Extension Voicemail Operator.</b>
<b>Recording Extension</b>	<b>This is the extension that will be dialed when automated attendant greetings are recorded. Please refer to the Recording Greetings section for more details. The default setting for this is the first extension in your list.</b>
<b>Voicemail Access</b>	<b>Enter a key sequence that will be used to access voicemail boxes from the automated attendant menu. You can use any valid telephone keypad character, including pound ("#") and asterisk ("*"), for example *98. The Auto Attendant must be active for this key sequence to work and must have a greeting recorded. For companies that don't use an Auto Attendant to answer calls, a "back door" voicemail access number is often set up with an Auto Attendant for this purpose to allow employee access to Voicemail remotely or access to the Conference Bridge.</b>

The auto-attendant consists of a main menu and up to eight distinct sub-menus. Each of these menus is configured identically. Option 9 is reserved for language selection if set up. Available options for configuration are as follows:

Attribute	Description
<b>Extension</b>	<b>Follow the chosen extension's dial sequence</b>
<b>All Extensions</b>	<b>Ring all extensions indefinitely</b>
<b>Conference Bridge</b>	<b>Enter the conference bridge</b>

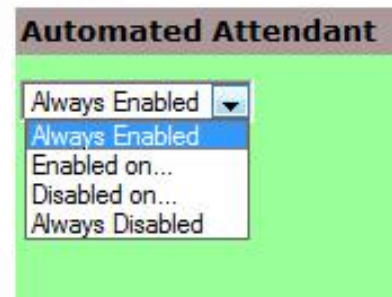


<b>Directory</b>	<p><b>Enter the dial by name company directory. This interactive voice menu is generated automatically by the PBX, allowing for callers to find extensions by entering the first three letters of a person's last name, using a touch-tone phone. Alternatively, the # key accesses the company directory so if you have used all of your option drop downs, you can indicate to press # for the directory.</b></p> <p><b><u>Exclusion of Extension(s) from the Company Directory</u></b>  <b>The PBX system builds the Dial by Name Directory automatically from the extension name field on the extension configuration tab. This feature allows specific extensions to be excluded from the company directory (i.e. Lobby, Boardroom, Executive, etc...)</b></p>
<b>Main Menu</b>	<b>Re-play the main menu greeting</b>
<b>Submenu</b>	<b>Play the chosen submenu voice prompt and branch to the submenu's options</b>

**Scenario for Example #1:** You have been given the task to create an auto-attendant for Just In Time Music. If the caller presses the '1' key, route the call to extension 101. If the caller presses the '2' key, route the call to extension 102. If the caller presses the '3' key, route the call to the Sales Group extension 303. If the caller presses the '7' key, route the call to the Company Directory (the # key will also default to the Corporate Directory if you choose not to use a numbered option) and if the caller presses the '8' key they will hear the Main Menu options play again.

**Auto Attendant example #1**

1. Sign onto the PBX and navigate to the Phone Numbers Tab.
2. Select a phone number from the Number drop-down menu.
3. Select 'Always Enabled' from the Scheduling Option drop-down menu in the Automated Attendant section.
4. Select 'Main Menu' from the Menu drop-down menu.
5. Select extension from the '1' drop-down menu. (eg. 101)
6. Select extension from the '2' drop-down menu. (eg. 103)
7. Select extension from the '3' drop-down menu. (eg. 303)
8. Select Directory from the '7' drop-down menu.
9. Select Main Menu from the '8' drop-down menu.
10. Record your Auto Attendant recording\*\*. The green playback arrow will not appear if a recording has not been created. The Auto Attendant **will not** function if a greeting is not there.
11. Apply Changes



**\*\* Refer to How to Record Auto Attendant – Section 4.3**

PBX Extensions Phone Numbers Conference Bridge Security ACD CDR E911 User Guide

Number: 519-804-2015 Main Number - Daytime Auto Attendant Ring Type: Default

Description: Main Number - Daytime Auto Attendant  
 Caller Name Prefix: TC Dial Prefix: 9

Default Forward: 803 - Day and Night Auto Attend

### Automated Attendant

Always enabled

Greeting Language: English, 9 for French  
 Operator Ext: 102 - Mary Smith  
 Recording Ext: 102 - Mary Smith  
 Voicemail Access: \*98

DISA		Authorized Numbers
Code	5555	519-111-2245
Enabled	<input checked="" type="checkbox"/>	519-222-1234
CallerID	Main TN	

Main Menu

1	101 - Peter (President)
2	103 - Paul (Sales Manager)
3	303 - Sales Group
4	
5	
6	
7	Directory
8	Main Menu

Access Locals   
 Timeout: 7 seconds  
 Timeout Option: Option 8

Main

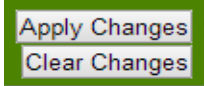
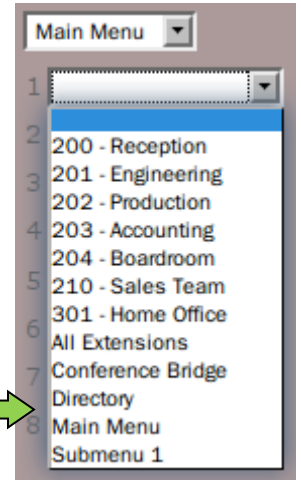
English  
 English French  
 Alternate   
 English French

**Scenario for Example #2:** You have been given the task to create an auto-attendant for Just In Time Music. You are required to create a main auto-attendant and two sub-auto-attendants. The first sub-auto-attendant is to handle sales; the second sub-auto-attendant is to handle accounting. From the main auto-attendant if the caller presses the '1' touch tone key, route the call to the sales auto-attendant. If the caller presses the '2' touch tone key, route the call to the accounting auto-attendant. From the sales attendant if the caller presses the '1' touch tone key, route the call to extension 101. If the caller presses the '2' touch tone key, route the call to extension 102. From the accounting attendant, if the caller presses the '1' touch tone key, route the call to extension 128. If the caller presses '2' touch tone key, route the call to extension 127.



**Auto Attendant with submenus example #2 (screen shots next page):**

1. Sign onto the PBX
2. Navigate to the Phone Numbers Tab
3. Select a phone number from the Number drop-down menu
4. Select 'Always Enabled' from the Scheduling Option drop-down menu in the Automated Attendant section
5. Record your Main Greeting (ie: "thank you for calling.... our hours of operation are...for sales, press 1; for accounting, press 2
6. Select 'Submenu 1' from the Menu drop-down menu
7. Check the enabled checkbox
8. Select extension from the '1' drop-down menu (eg. 101)
9. Select extension from the '2' drop-down menu (eg. 102)
10. Record your Submenu Recording (ie: "for Guitar sales, press 1; for Amplifier sales, press 2)
11. Apply Changes
12. Select 'Submenu 2' from the Menu drop-down menu
13. Check the enabled checkbox
14. Select extension from the '1' drop-down menu (eg. 128)
15. Select extension from the '2' drop-down menu (eg. 127)
16. Record your Submenu Recording (ie: for accounts payable, press 1; accounts receivable, press 2)
17. Apply Changes
18. Select 'Main Menu' from the Menu drop-down menu
19. Select Submenu1 from the '1' drop-down menu to insert beside number 1
20. Select Submenu2 from the '1' drop-down menu to insert beside number 2
21. Apply Changes





**Automated Attendant**

Always enabled

Greeting Language

Operator Ext

Recording Ext

Voicemail Access

DISA		Authorized Numbers
Code	<input type="text" value="5555"/>	<input type="text" value="519-111-2245"/> <input type="text" value="519-222-1234"/>
Enabled	<input checked="" type="checkbox"/>	
CallerID	<input type="text" value="Main TN"/>	

Main Menu

Access Locals

Timeout

Timeout Option

1

2

3

4

5

6

7

8

Main

English  French

Alternate

English  French

Submenu 1

1

2

3

4

5

6

7

8

Access Locals

Timeout

Timeout Option

English  French

Submenu 2

1

2

3

4

5

6

7

8

Access Locals

Timeout

Timeout Option

English  French

*\*\*For more Examples of Call Flow Options see Section 13 – Call Flow Set Ups*



## Section 4.2 – Access Locals and Timeout Options

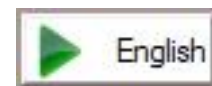
Attribute	Description
Access Locals	If this is selected, the caller may dial an extension from within the Auto Attendant to reach a specific Extension. For Example "If you know your party's extension, please enter it now". If you do not want callers to be able to bypass menu options and call an extension this should not be selected.
Timeout	This is the amount of time, in seconds, that the Auto Attendant will wait for caller choose a menu item selection before proceeding to the Timeout Option.
Timeout Option	The default selection if the user fails to make a menu item choice within the allotted Timeout period. This may be set to ring an Operator or any other Option that is set up in the Main Menu.

## Section 4.3 – Recording Greetings

To record a menu greeting message, click on the language specific record button. For example, to record the English greeting, click on the following button:



The extension defined under the [Recording Extension](#) Section will ring. Pick up the receiver and follow the attendant's prompts to record the company greeting. Once recorded, stay on the phone for further instructions on how to listen to the greeting again and how to save it. If you want to hear the message again at a later date, you can click on the language-specific *play* button which displays a green triangle and the greeting will play back through the Recording Extension's handset.



If no greeting is recorded the Green "play " arrow will not appear. Remember an Auto-Attendant **will not** function unless a greeting is recorded.

## Section 4.4 – Alternate Greetings

Allows you to record Holiday Greetings and Office Closures, and give you the ability to toggle between the Holiday/Office Closure Recording and the Normal Day-to-Day Auto Attendant.

**Automated Attendant**

Always enabled

Greeting Language: English, 9 for French

Operator Ext: 103 - Paul (Sales Manager)

Recording Ext: 102 - Mary Smith

Voicemail Access: \*98

DISA		Authorized Numbers
Code	5555	519-111-2245
Enabled	<input checked="" type="checkbox"/>	519-222-1234
CallerID	Main TN	

Main Menu

1	Submenu 1
2	Submenu 1
3	
4	
5	
6	
7	
8	

Access Locals

Timeout: 7 seconds

Timeout Option: Operator

Main  ←

English

English French

Alternate

English French

In the above example the "Main" Auto Attendant under the Phone Numbers Tab is currently in use. In order to Record your Alternate Auto Attendant which can be used during Holiday and Office Closures, press the English Recording Microphone Button under the "Alternate" heading. Recording Extension (eg: 102) will ring. Pick up the handset and listen to the prompts to record your "Alternate Greeting". To utilize your Alternate Greeting, click beside the word "Alternate". This will place a check mark in the box. To save your changes, click on "Apply Changes" icon in the bottom right hand corner for this change to take effect. This will activate your "Alternate" Greeting. Upon return to normal Office Hours, click beside the word "Main". This will place a check mark in the box. To save your change, click on "Apply Changes" icon for this change to take effect. This will activate your Normal Day-to-Day Auto Attendant without having to re-record it.

The Example below shows an "Alternate" Greeting in use.

**Automated Attendant**

Always enabled

Greeting Language: English, 9 for French

Operator Ext: 103 - Paul (Sales Manager)

Recording Ext: 102 - Mary Smith

Voicemail Access: \*98

DISA		Authorized Numbers
Code	5555	519-111-2245
Enabled	<input checked="" type="checkbox"/>	519-222-1234
CallerID	Main TN	

Main Menu

1 Submenu 1

2 Submenu 1

3

4

5

6

7

8

Access Locals

Timeout: 7 seconds

Timeout Option: Operator

Main

English

English French

Alternate  ←

English

English French

## Section 4.5 – Remote Auto Attendant Recordings

With the Remote Auto Attendant Recording feature you are now able to record or replace the existing Auto Attendant recordings from a third party phone.

This can be done when the PBX is offline or when you need to replace the recording without having physical access to the PBX. You will be required to have a phone number with the DISA (Direct Inward System Access) feature enabled on it, along with an “Authorized User” number that you will be calling in from in order to remotely record Auto Attendants.

### Steps to Remotely Record Auto Attendant:

1. Call into the PBX Telephone Number which has the DISA feature enabled from the phone that has it's number authorized to use the DISA feature
2. Enter your DISA code
3. Dial the “Recording Sequence” as per further below and follow the IVR instructions

### Recording Sequence is:

LANGUAGE + TN + MENU

LANGUAGE = 71 for ENGLISH  
72 for FRENCH



TN = PBX phone number where you want to record the Auto Attendant on.  
MENU = 01 – Main  
02 – sub menu1  
03 – sub menu2  
04 – sub menu3  
05 – sub menu4  
06 – sub menu5  
07 – sub menu6  
08 – sub menu7  
09 – sub menu8  
11 – Alternate Main

#### **Examples of recording sequences:**

71-519-111-2222-01 - to record English version of the main menu for 519-111-2222  
72-519-111-2222-01 - to record French version of the main menu for 519-111-2222  
71-519-222-1111-04 - to record English version of sub menu 3 for 519-222-1111

## ***Section 4.6 – Holiday/Vacation Auto Attendant Settings***

The Holiday Configuration / Auto Attendant allows for multiple auto attendant greetings to be recorded and enabled to play on pre-determined dates. These greetings can all be pre-set at one time and then used for the various holidays throughout the year. Once these greetings have been recorded with a start and end date and enabled, there is no requirement to re-record for the year.

In order to set up and record a Holiday Greeting:

1. Access the Phone Numbers Tab in the Configuration Facility
2. Select the Phone Number that your Holiday Auto Attendant Greeting(s) will be recorded on
3. Select Always Enabled from the drop down list of options
4. Enter a name under the "Holiday Name" section in the lower portion of the screen
5. Select your Start Day and End Date (***note: if for example you insert July 12, 2014 to July 14, 2014 the greeting will become active at 12:00 a.m. on July 12 and be in effect until the end of July 14 at 11:59 p.m.***)
6. Record your greeting by selecting the Recording Extension from the drop down list of options in the upper middle section of the screen
7. Press either the English or French red microphone icon beside the Holiday Greeting's name in order to record the specific greeting
8. Once pressed the handset that is set as the Recording Extension will ring. Pick up the handset and follow the prompts to record and save the greeting.
9. Upon the successful recording of the greeting a green arrow icon will appear beside the red microphone icon. In order to listen to the recording at a later date, you can press the green arrow and it will play back the greeting through the recording extension's handset.



10. To enable the greeting, click in the box under the Enable column beside the greeting. Once enabled, the greeting will only become active during the specified Start and End Dates.
11. Apply all Changes
12. Follow Steps 1 through 11 to add additional holiday greetings

Number: 519-804-2015 Main Number - AA Ring Type: Default

Description: Main Number - AA  
 Caller Name Prefix: PRO Dial Prefix: [ ]

Default Forward: 103 - Lesley

### Automated Attendant

Always enabled [v] Greeting Language: English only  
 Operator Ext: 103 - Lesley  
 Recording Ext: 103 - Lesley  
 Voicemail Access: \*98

DISA		Authorized Numbers
Code	5555	416-111-2222
Enabled	<input checked="" type="checkbox"/>	519-000-1111
CallerID	Main TN	

Main Menu [v]

- 1 792 - Sally
- 2 103 - Lesley
- 3 808 - ACD Sales Queue
- 4 809 - Lesley
- 5 Submenu 6
- 6 Conference Bridge
- 7 Directory
- 8 Main Menu










Access Locals   
 Timeout: 7 seconds  
 Timeout Option: Option 8

Main   
 English   
 English   
 Alternate   
 English

Holiday Name	Start Date	End Date	Enabled	English	French
Thanksgiving	2014/10/18	2014/10/22	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Christmas	2014/12/25	2015/01/02	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Easter	2015/03/27	2015/03/30	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Green Arrow will appear once recording is saved.

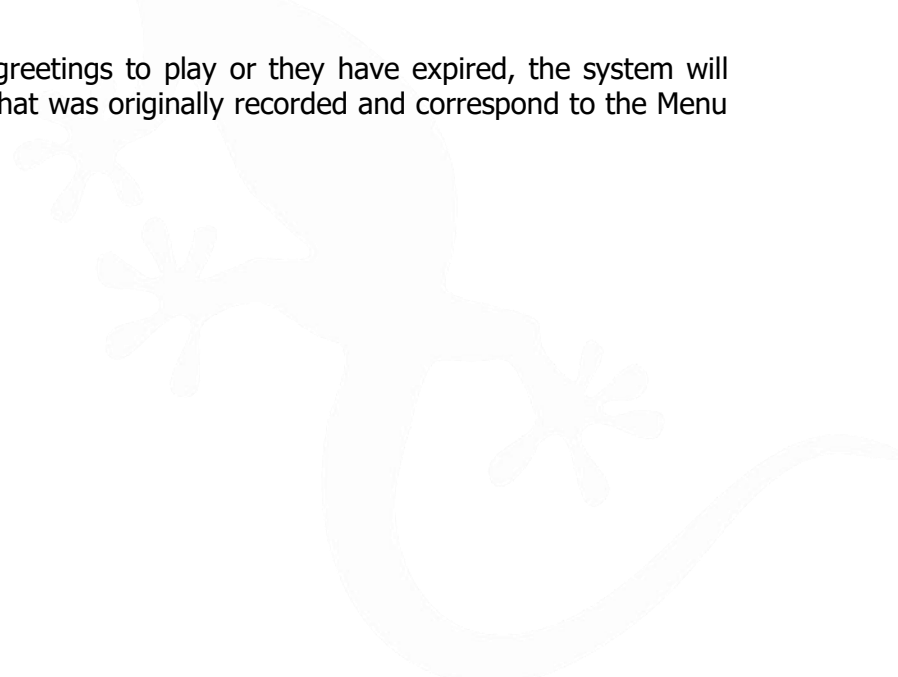


Holiday Name	Start Date	End Date	Enabled	English	French
Thanksgiving	2014/10/18	2014/10/22	<input checked="" type="checkbox"/>	 	
Christmas	2014/12/25	2015/01/02	<input checked="" type="checkbox"/>	 	
Easter	2015/03/27	2015/03/30	<input checked="" type="checkbox"/>	 	
<input type="text"/>					

Note: If you have multiple holiday greetings enabled and have inserted the same date range for more than one of them in error, the greeting that is first in the list will be heard. (Eg: I insert Easter with date of March 18<sup>th</sup> to March 21<sup>st</sup> and then on the next line I enter another holiday with the same date range - - the Easter recording would be heard during this date range because it is listed before the other holiday that was added with the same date range.)

Your menu option call flow for all holiday greetings will be the options that you had originally set under the Main Menu section of the screen. If you need to change any of the options to correspond with your holiday greeting you can do so but make sure that you apply any changes and then change these options back to your Main Greeting call flow after the holiday greeting has expired.

If there are no scheduled holiday greetings to play or they have expired, the system will play the "Main" company greeting that was originally recorded and correspond to the Menu Option selections.





The screenshot displays the NEWT system configuration interface. On the left, a 'Main Menu' dropdown is expanded to show a list of menu items: Submenu 1, 402 - Tech Support Queue, 401 - Sales Queue, an empty dropdown, Directory, Conference Bridge, and two more empty dropdowns. On the right, 'Access Locals' is checked, with 'Timeout' set to 10 seconds and 'Timeout Option' set to Option 1. A yellow arrow points to a 'Main' dropdown menu which is expanded to show 'English' (with a play icon), 'English' (with a microphone icon), and 'French' (with a microphone icon). Below this, an 'Alternate' section is visible with 'English' and 'French' (both with play icons), and another row with 'English' and 'French' (both with microphone icons). At the bottom, a table lists holiday greetings with their start and end dates and language options.

Holiday Name	Start Date	End Date	Enabled	English	French
Christmas	2014/10/18	2014/10/22	<input checked="" type="checkbox"/>		
Easter	2014/12/25	2015/01/02	<input checked="" type="checkbox"/>		
Thanksgiving	2015/03/27	2015/03/30	<input checked="" type="checkbox"/>		

In the Figure below the Thanksgiving Greeting will be heard from 12:00 a.m. on October 18<sup>th</sup> to 11:59 p.m. on October 22<sup>nd</sup>; the Christmas one from 12:00 a.m. on December 25<sup>th</sup> to 11:59 p.m. on January 2<sup>nd</sup>; and the Easter one from 12:00 a.m. on March 27<sup>th</sup> to 11:59 p.m. on March 30<sup>th</sup>. Outside of these dates the Company's Main Greeting will be played.

Holiday Name	Start Date	End Date	Enabled	English	French
Thanksgiving	2014/10/18	2014/10/22	<input checked="" type="checkbox"/>		
Christmas	2014/12/25	2015/01/02	<input checked="" type="checkbox"/>		
Easter	2015/03/27	2015/03/30	<input checked="" type="checkbox"/>		