Auto Attendant Guide

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1 INTRODUCTION

Nextera Communication's Auto Attendant Service is an interactive voice response system that directs callers to the appropriate extensions or voice mailboxes. Via MyNextera web interface you establish menu options and recordings for your callers. Nextera's Auto Attendant Service is ideal for any size business to provide an automated means of directing incoming calls to the appropriate person within the organization.

To access the Auto Attendant via the Telephone you will need an Access Number, Account Number and Password. These are as follows:

Company Name: _____   **Access Number:** _____

Account Number: _____   **Password for Account Number:** _____

Your auto attendant will be established days in advance of your installation which will allow you to test your Auto Attendant functionality before your Auto Attendant has been enabled. **You will not want to enable your Auto Attendant until you have it completely configured and your installation has occurred.**

Auto Attendant Telephone Number: _____   **Password:**_____

2 PLANNING YOUR AUTO ATTENDANT STRUCTURE

Before you establish your Auto Attendant, it is highly recommended to sketch out the operation of each menu tree with the key press number on paper. This allows you to plan what options you need from the menu and how each one will operate. For example, the menu for a company similar to Nextera may need to include the following options:

- Play an announcement giving directions to the office, then return to the main menu so that the user can select another option
- Speak to customer care
- Speak to provisioning
- Speak to another employee using Dial-By-Name.
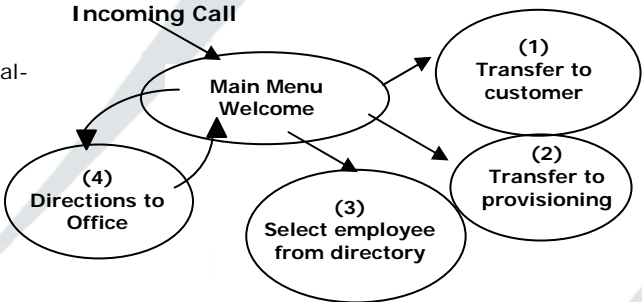
3 PLANNING YOUR ANNOUNCEMENTS

When you are planning announcements to be used with the Auto Attendant menus, it is a good idea to describe each possible action followed by its associated key press. For example say "**To speak to the manager, press 4".** This makes the menu easier to use because the caller does not have to remember the key press while listening to the action description. 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.** You can also define different menus for use for 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 to be 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 or by **Dial-by-Name** or **Dial-by-Extension**.

4 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 them if required, and save them in a standard .wav or mp3 format. MyNextera allows you to upload these files for use on the system.

- You can use the telephone admin interface to record the announcements using your telephone. Use the 3-digit announcement numbers from the web interface to specify which announcement is recorded.

Note: Uploading recorded names and Extension selections are detailed further in section 7.

5 CONFIGURING AUTO ATTENDANT VIA NYNEXTERA

### 5.1 How To Access the Web Interface/MyNextera

MyNextera allows you to begin creating your own customized Auto Attendant. To access the interface, you will need to:
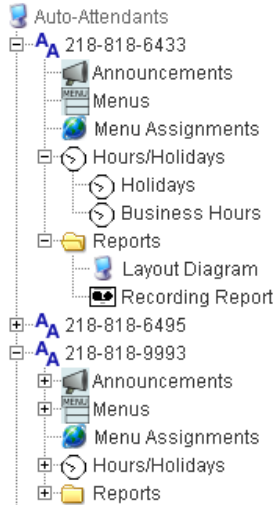- Start your browser and enter **www.nextera.net**

- Click on the **MyNextera Icon** (you may see security dialogs, choose **OK** or **Yes).** Enter your Username and Password and click **Log in.** Your MyNextera Username and Password was chosen by you when you ordered your Nextera service. Please contact your Nextera representative if you do not have this information available.

- CommPortal is displayed. Click on **Auto-Attendant** within the left menu.
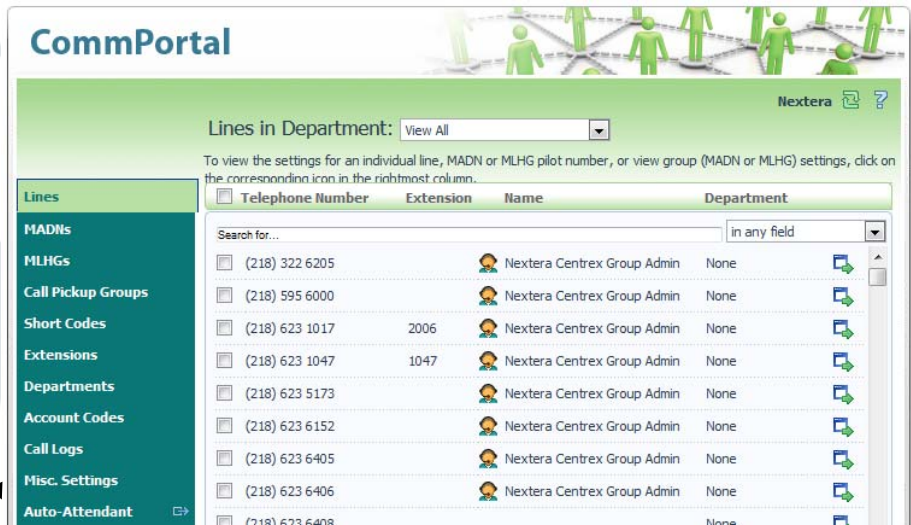
6   AUTO ATTENDANT MENU TREE

Click on the **+** symbol next to your auto Attendant to expand the menu tree, as shown below.

Auto-Attendants
⊟ 218-818-6433
　　 Announcements
　　 Menus
　　 Menu Assignments
⊟ Hours/Holidays
　　 Holidays
　　 Business Hours
⊟ Reports
　　 Layout Diagram
　　 Recording Report
⊞ 218-818-6495
⊟ 218-818-9993
⊞ Announcements
⊞ Menus
　　 Menu Assignments
⊞ Hours/Holidays
⊞ Reports

Menu Item Descriptions:

Menu Assignments – Specify which Auto Attendant menu is used for regular business hours, out of office hours and holidays.

Hours/holidays – Specify what your normal business hours are and which dates are holiday.

Announcements – Specify the announcements used by this auto attendant.

Menus - Specify the menus used by this Auto Attendant.

Reports – Create reports that show how the Auto Attendant is set up.
- **Layout Diagram** represents the menu structure of your Auto Attendant that shows the different paths through the menus and how many times each path has been followed.
- **Recording Report** shows all the recordings included in your Auto Attendant.

Extensions - A list of extension numbers available to this business group. A call to an auto Attendant can be routed to any of these numbers by the Auto Attendant's menus. In most cases this field will be blank as this is typically set up for extension dialing, not by intercom code.

6.1   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, they are listed below the Announcements entry. If you cannot see them, click on the **+** next to the announcement 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.

Announcements

Announcement Name	PP Main
Announcement description (256 character limit)	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, press 9
	205 characters
Upload wav file (optional)	Browse...

Create

Note: To upload an announcement you must first create one using your laptop or PC microphone saved as a .wav or MP3 file.   You can also use your Telephone Administration function to record an announcement.

6.2   Menus

Menus – The Menus entry in the menu allows you to create the menus used in the Auto Attendant and 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.

Menu Name
Please provide a unique name for all your menus
PP Main

Menu Description (256 character limit)
Describe how this menu differs from others that can use the same announcement
Main Menu for store hours: request direction, place an order, speak to manager, dial by extension or name

105 characters

Announcement
Choose the announcement to be played
100 - Hi

Timeout Period
Wait up to 2 seconds for key press.
Greeting

Create

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.

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.

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. Once you have established your menu items, you will need to associate each action to a key press using the **Menu Options Page.**

6.3   Menu Options Page

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

Choose a filter – This is 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.

Choose an action – The action that the Auto Attendant should take when the user selects this option. Possible values are:
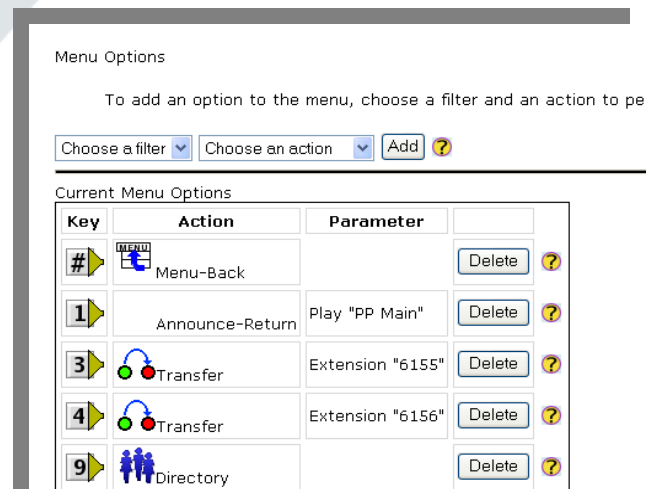
- **Announce-Release** – Play an announcement and release the call.
- **Announce-Return** – Play an announcement and return to this menu.
- **Directory** – Enter the directory function, where the user can select an extension using dial-by-name.
- **Menu** – Go to another menu.
- **Menu – Back** – Return 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 have selected **Menu** in the **Choose an action** field. Click on the field to select the next menu that is to operate.

Extension or External Number - This field appears only if you selected **Transfer** in the **Choose an action field.** Either click on the **Select Extension** box and select the extension to which the caller is to be transferred or type the directory number of the external line to which the caller is to be transferred. 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.

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 with 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 **Announce-Return** to play an additional announcement, **Announce-Release** to play an additional announcement then hang up, or **Transfer** to transfer the call to an extension with voicemail enable so that the caller can leave a message.

6.4 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 office hours on business days, and on holidays). Click on the Menu Assignments entry in the menu to do so.

For each of the three times (business hours, out of office hours on business days, and on holidays), click on the field to select which menu is to be used. If you do not have different menus at different times, you can set up two or more 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 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.**

Account Information - Menu Assignments

Select the menu that will be used on holidays — 12 - PP Main

Select the menu that will be used for calls made during business hours — 10 - Greeting

Select the menu that will be used for calls off business hours — 11 - PP Main

Save
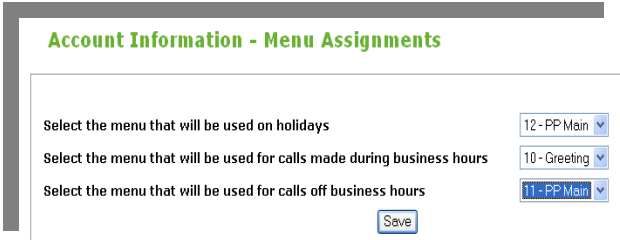
6.5 Hours/Holidays

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 announcement and menus according to the time and date of the call. Click on **Hours/Holidays** entry on the menu. Below this, click on the Holidays entry to view or change the current holiday assignments.

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 is shaded in blue.
- To assign a new date as a holiday, click on the **date in the calendar**.
- To clear a date currently assigned as a holiday, click the **shaded date**. The display changes to show this date un shaded

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.

Holiday Date Assignment

Calendar Year: 2007

Click on the days to select or de-select holidays.
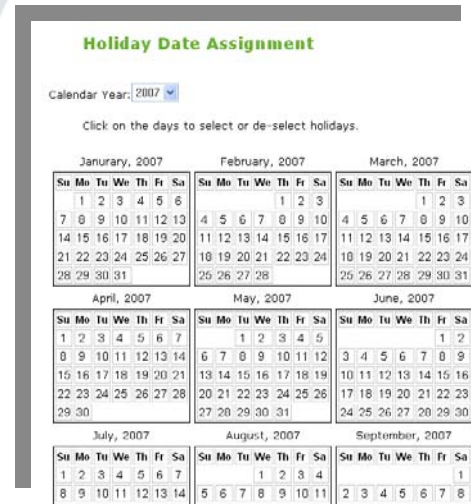
6.6 Business/Weekend Menu Assignment

Time Zone – This is 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-hours clock format hh:mm). For example, if the business is open from 8:30 am to 5:15 pm, 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** 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 for Sundays, leave both **Start Time** and **End Time** blank under Sunday.

A quick reference table will be 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**.
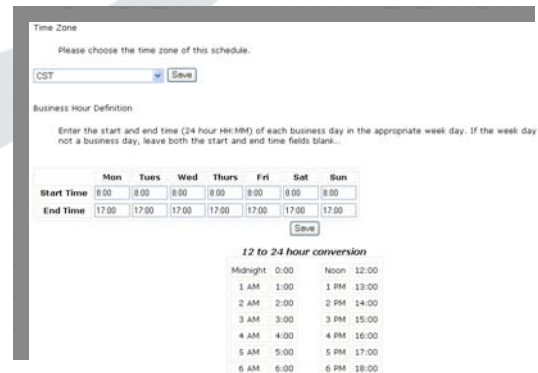
7	SETTING EXTENSIONS AND DIAL-BY-NAME DIRECTORY

Each phone number in the business group directory must have a name assigned to that extension to use the Dial-By-Name Directory function. Under the main men, click on **Select Line** to modify each line if it does not have a name attached. You must enter the field with First (space) Last name.

Under Extensions in the Auto Attendant Menu tree select an extension and upload the sound file of the name associated with that extension. This will allow the directory to announce the name of the person you selected to confirm that the correct selection has been made.

8	ENABLING THE AUTO ATTENDANT

When you have finished assigning the menus, you can now enable Auto Attendant. Click on the **Auto Attendant number**

to view the Account Information dialog.

Click the box 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.

9	REPORTS

The Auto Attendant can display reports that provide a summary of the menu structure you have established 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.

9.1 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 through 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 office 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 about 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 **Clear 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.

9.2 Recording Report

The Recording Report provides a list of all announcements and extensions on the Auto Attendant.

Red highlighting on an announcement or extension indicates a missing recording.

Announcements	
100	**Hi** Greeting
101	**333** 333
102	**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, press 9

Extensions	
6155	Mark Niemi
6156	

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10   TELEPHONE ADMINISTRATION

Nextera's Auto Attendant Telephone Administration Interface allows you to access to some the Auto Attendant functions by using your telephone to:
- Activate or deactivate the Auto Attendant
- Record and check the announcements and the recorded names for extensions
- Test the Auto Attendant menus to ensure that they are operating as you intended.

To access the Telephone Administration Interface you will need the following information which was provided on the first page of this packet:
- Access telephone number for the Telephone Administration Interface
- The telephone number of the administration line and the password for your Business Group.

To use the interface, dial the access number. You will then be prompted for the administration line telephone number and password.

10.1   Quick Keys for Telephone Administration

When using Nextera's Telephone Administration Interface for the Auto Attendant, 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.

1   **Activation Status** - To activate or deactivate the Auto Attendant, press **1** at the main menu. An announcement will be played to confirm the updated status after the key has been pressed. While deactivated, the Auto Attendant simply transfers all calls to the default telephone number set on the Account Information page of the Web Interface.

2   **Manage Announcements** - To listen to one of the announcements recordings in the Auto Attendant, and/or to record it press **2** at the main menu. Then type the 3 digit announcement number followed by the **#** 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 the tone then speak into the telephone to record the new announcement and press **#** when you are finished. You can then press **1** to hear the new announcement you have just recorded.
- To commit to 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.

3   **Manage Extensions** – To listen to one of the extension announcements recordings in the Auto Attendant, and/or to record it press **3** at the main menu. Then type the extension number followed by the **#** 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 recording, press **1**
- To record a new extension name recording press **2**. Wait for the tone then speak into the telephone to record the new extension name and press **#** when you are finished. You can then press **1** to hear the new extension name you have just recorded.
- To commit to the new extension 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.

4   **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 # 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 at this point would be taken in the real menu system. 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 Administration Interface

*   Returns to the previous menu. If you are already on the top-level menu, this key simply replays the top-level menu.

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 administration interface, simply hang up the phone.