

MITEL
MyAttendant[™]
User Guide



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MITEL MyAttendant User Guide

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User Guide

Who This Guide is For

This guide is written for the user of the MITEL® MyAttendant™ application. This person should be knowledgeable in call handling on the SX-200® PBX, sending messages, and should be knowledgeable with Windows Applications.

What This Guide Contains

This Guide provides an overview of MITEL MyAttendant, a description of the MITEL MyAttendant windows, and instructions on how to handle calls and manage messages.

The guide contains the following sections:

- Product Overview
- Starting MITEL MyAttendant
- Logging In/Out
- Controlling the Handset/Headset Volume
- Overview of the MITEL MyAttendant Windows
- Handling Calls
- Handling Messages.

Product Overview

MITEL MyAttendant is a software application that provides a call answering position for general business and multi-tenant environments. This PC application allows users to work on other PC applications when there are no incoming calls; when there are calls the user can effectively manage calls for multiple clients.

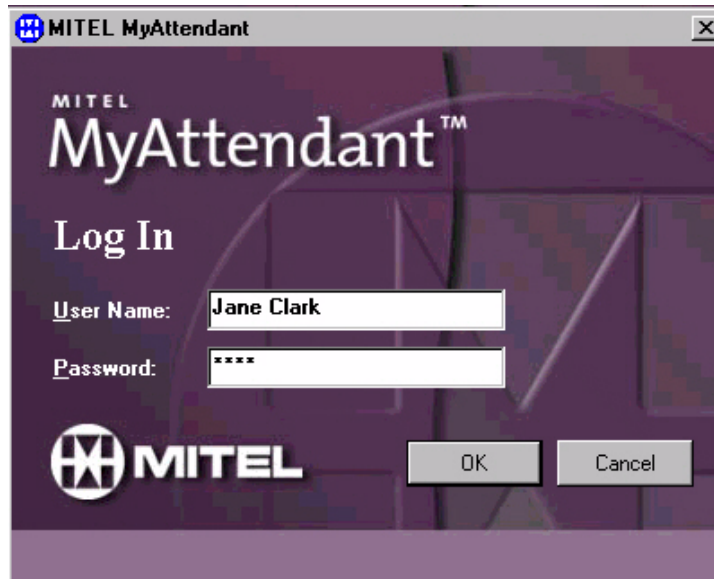
MITEL MyAttendant

- Provides a Message Board where messages are typed, saved, printed or emailed to the client
- Displays customized greetings for different incoming calls
- Lists contacts associated with each client to allow easy transferring
- Shows specific transfer information; e.g. cell phone, extension, and pager numbers.

MITEL MyAttendant on a PC can be used in conjunction with other PCs with MITEL MyAttendant to allow a group of attendants to work as a team. Information such as the client database, and information about a call waiting in the queue can be shared via a local area network.

Starting MITEL MyAttendant

To start the MITEL MyAttendant application, the attendant uses the Windows Start menu, selects Programs, MITEL MyAttendant, and then clicks on the next MITEL MyAttendant. A Log In window opens. The attendant enters their name, password, and clicks OK.



Logging In/Out

After starting the application, the application automatically logs in and starts accepting calls. During the day when the attendant does not wish to take calls, the attendant can log out using the Logout key on the keyboard. When the attendant wishes to answer calls again, the attendant can use the Login key. These keys do not open or close the application; the keys control the calls coming in. Pressing the Logout key, allows the attendant to remain logged into the PC but not available to take calls.

To log in, press the **Login** (Insert) key.



To log out, press the **Logout** (Delete) key.



Controlling the Handset Volume

To increase the volume of the console handset or headset

- Press the **Ctrl** and Up Arrow keys together.

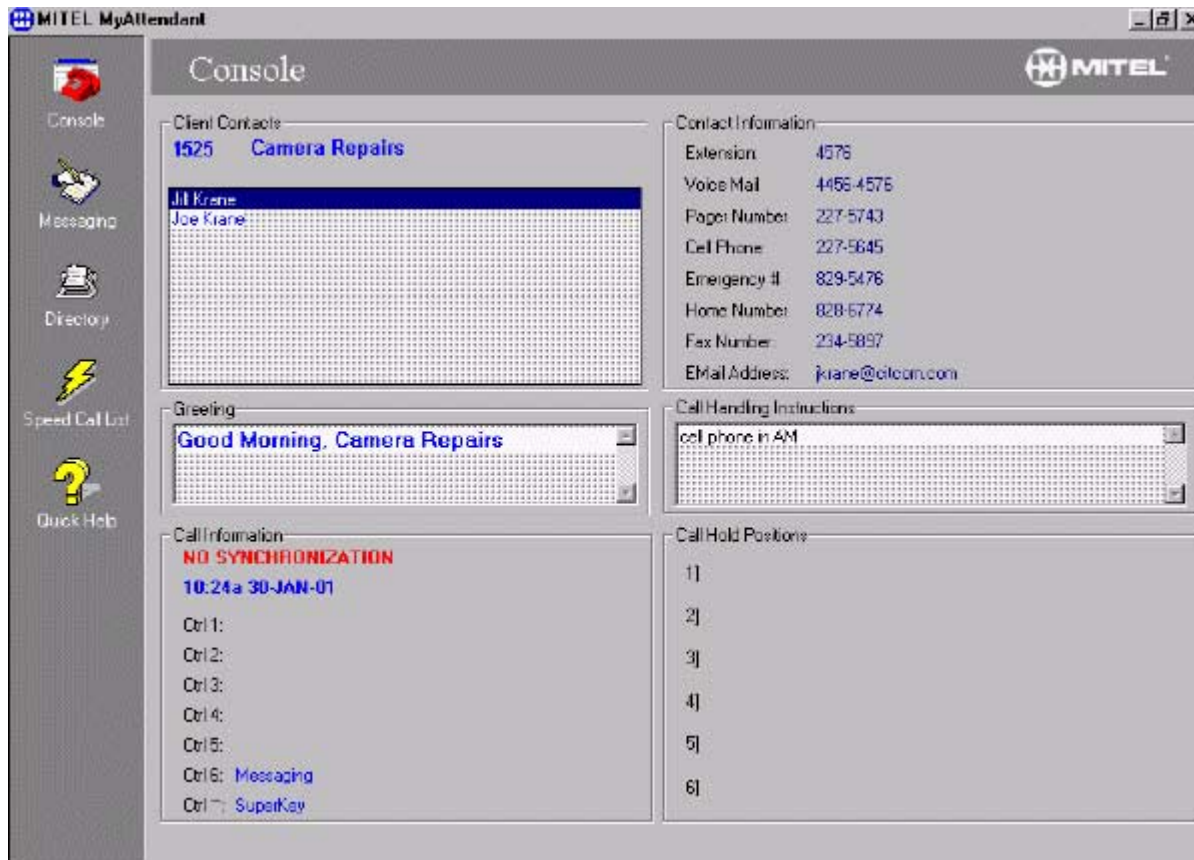
To decrease the volume of the console handset or headset

- Press the **Ctrl** and Down Arrow keys together.

Overview of the MITEL MyAttendant Windows

The Console Window

The Console window is the main window of MITEL MyAttendant. The Console window provides information for all the call handling. You use this window as your main working area when answering and transferring calls. The Console window automatically comes to the foreground when a call comes in.



On the left side of the Console window, five icons provide access to different functions of the application.



The five icons are

- Console - for call handling
- Messaging - for managing messages
- Directory - for placing calls to a contact
- Speed Call List - for placing a speed call
- Quick Help - for informing the user of keystrokes for tasks related to call handling and messaging.

These five different functions can be accessed by clicking with the mouse on the associated icon or by using their associated key sequence. Key sequences for each icon are shown below.

Function	Key Sequence
Console	ALT - C
Messaging	ALT - M
Directory	ALT - D
Speed Call List	Speed
Quick Help	ALT - H

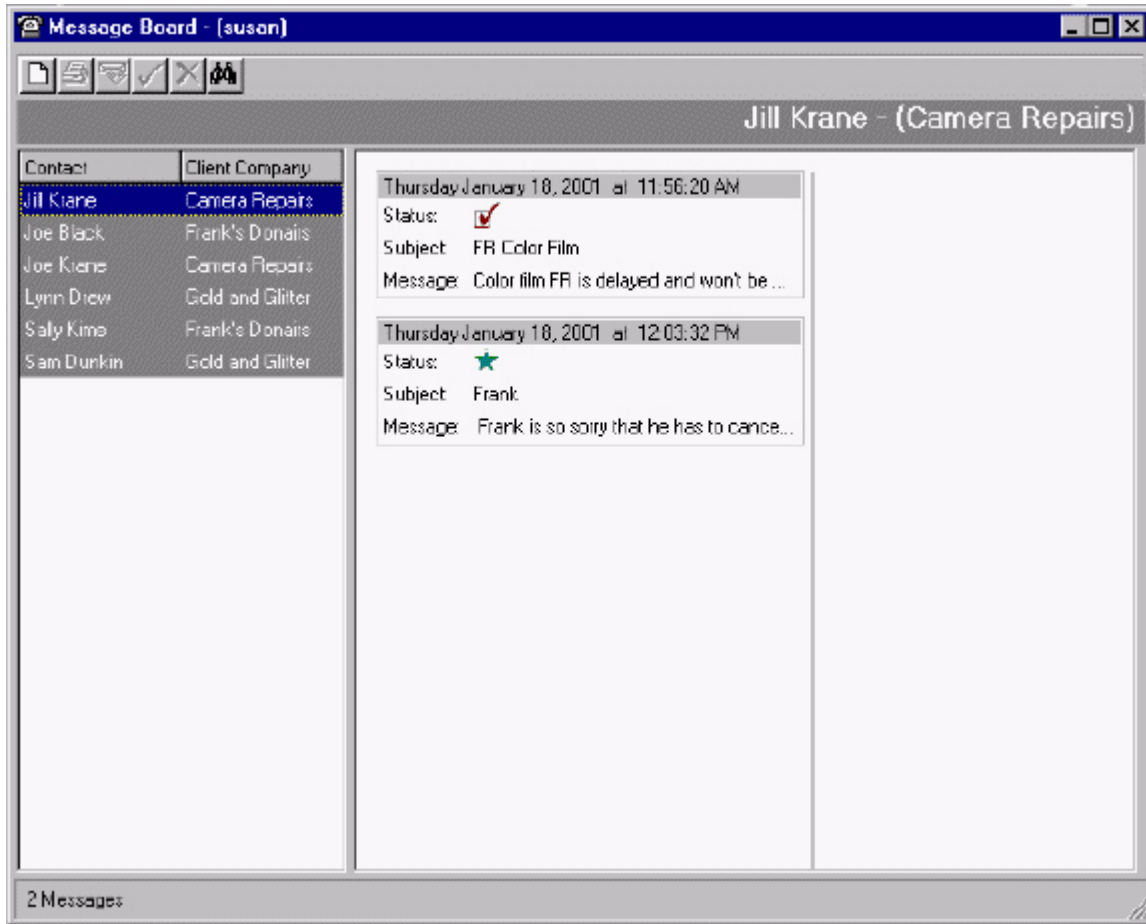
You can access additional information about a client company by pressing the Info 2 (Page Down) key when the Console window is open. Pressing the Info 1 (Page Up) key returns the original Console window. Information to these user fields can be edited and saved.

The screenshot shows the MITEL MyAttendant Console window. The title bar reads "MITEL MyAttendant" and "Console". The MITEL logo is in the top right corner. On the left is a vertical navigation menu with icons for Console, Messaging, Directory, Speed Call List, and Quick Help. The main area is titled "Additional Client Information" and contains the following fields:

Client		Number	
Address:	164 Ottawa St.	State / Province:	Ontario
Suite:	4C	Zip/Postal Code:	L2H 7C2
City:	Ottawa		
License Plate:	CCC 567 for Lexus, FDR 896 for Corolla	User Field 6:	
Billing Information:	Done mid month	User Field 7:	
Parking Contact:	Due December with ABC Parking	User Field 8:	
User Field 4:		User Field 9:	
User Field 5:		User Field 10:	
User Field 11:		User Field 16:	
User Field 12:		User Field 17:	
User Field 13:		User Field 18:	
User Field 14:		User Field 19:	
User Field 15:		User Field 20:	
Web Address: www.camera_repairs.com		Save	

The Message Board Window

The Message Board window allows you to manage the messages for the client.



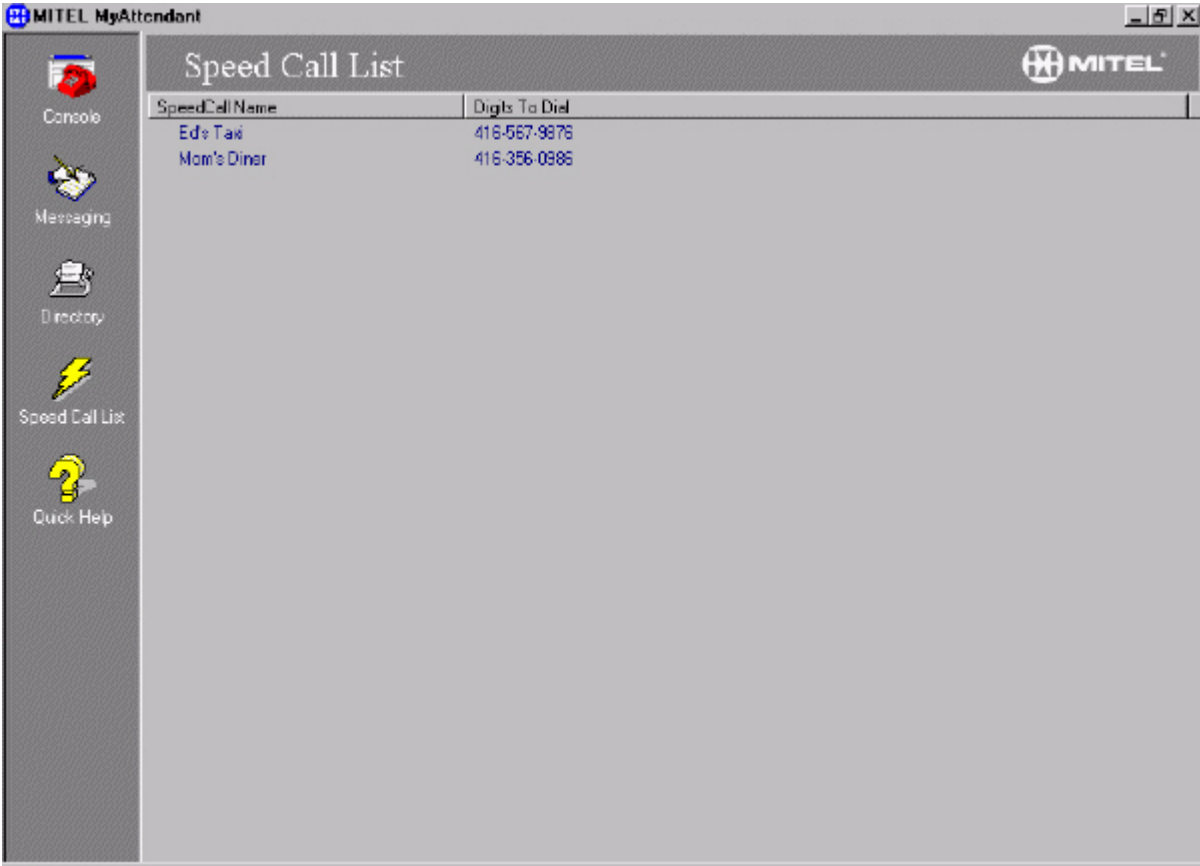
The Directory Window

The Directory window contains a complete list of contacts that are served by the MITEL MyAttendant application. Double clicking on a contact in the Directory window, brings up the Console window with information in the Contact Information field.

Contact	Extension	Client	Number
Jill Krane	4576	Camera Repairs	1525
Joe Black	1687	Frank's Donairs	5348
Joe Krane	4577	Camera Repairs	1525
Lynn Drew	1412	Gold and Glitter	1411
Sally Kime	1688	Frank's Donairs	5348
Sam Dunkin	1413	Gold and Glitter	1411

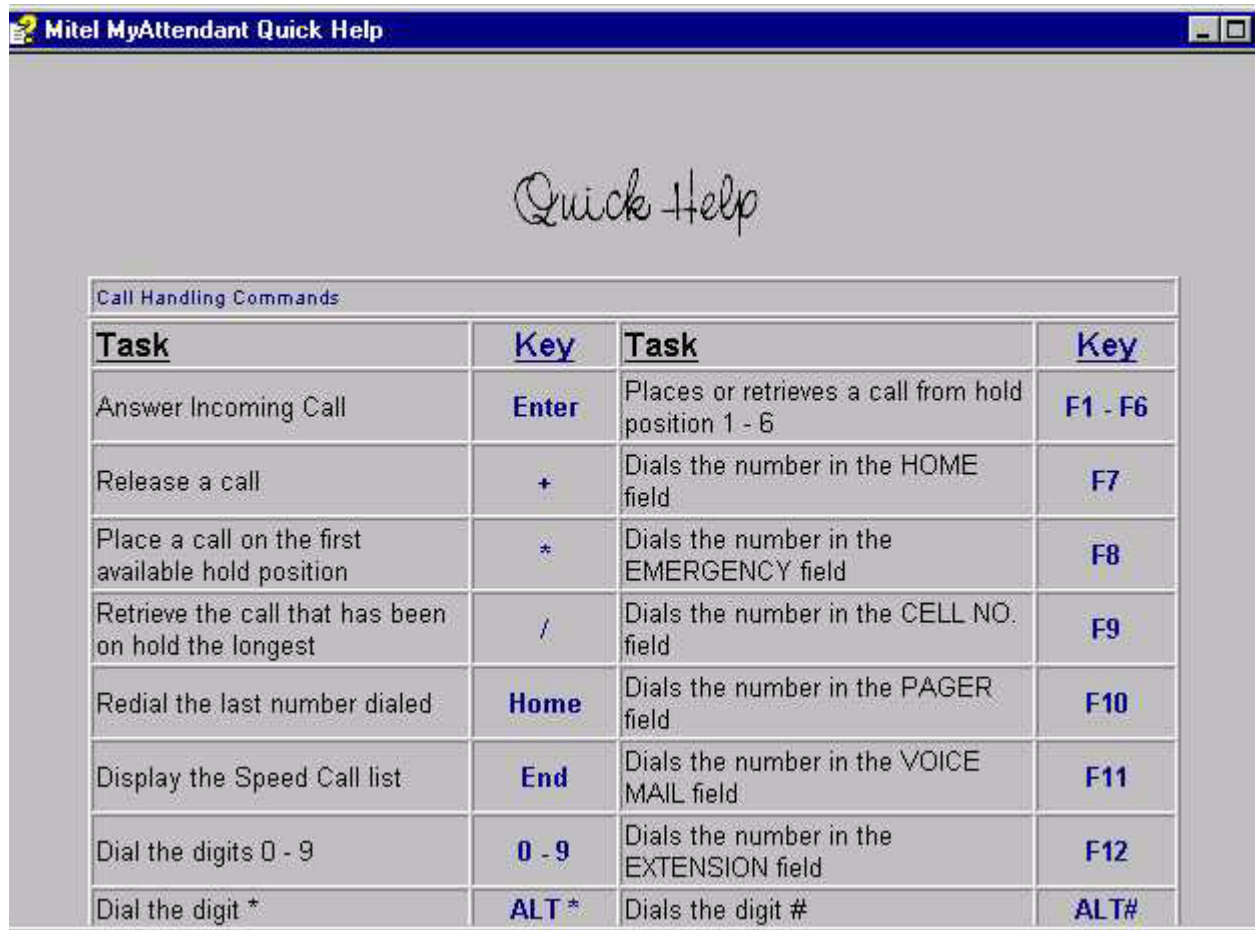
The Speed Call List Window

The Speed Call List window displays a list of frequently called numbers. The attendant can dial these by double clicking the entry from the list.



The Quick Help Window

The Quick Help window provides a quick reference of keystrokes that you can use for call handling. You can access this window from the Console window by clicking on the Help icon or by pressing ALT-H.



Call Handling Commands			
<u>Task</u>	<u>Key</u>	<u>Task</u>	<u>Key</u>
Answer Incoming Call	Enter	Places or retrieves a call from hold position 1 - 6	F1 - F6
Release a call	+	Dials the number in the HOME field	F7
Place a call on the first available hold position	*	Dials the number in the EMERGENCY field	F8
Retrieve the call that has been on hold the longest	/	Dials the number in the CELL NO. field	F9
Redial the last number dialed	Home	Dials the number in the PAGER field	F10
Display the Speed Call list	End	Dials the number in the VOICE MAIL field	F11
Dial the digits 0 - 9	0 - 9	Dials the number in the EXTENSION field	F12
Dial the digit *	ALT *	Dials the digit #	ALT#

Handling Calls

Introduction

The MITEL MyAttendant application is a tool used to intelligently process incoming and outgoing calls. The call handling features available with this application allow you to effectively manage incoming and outgoing calls using your workstation.

Call handling features are controlled through the programming of the SX-200 PBX. Because the features are dependant on this programming, certain features may not be available to the attendant.

This section provides the following information for the user:

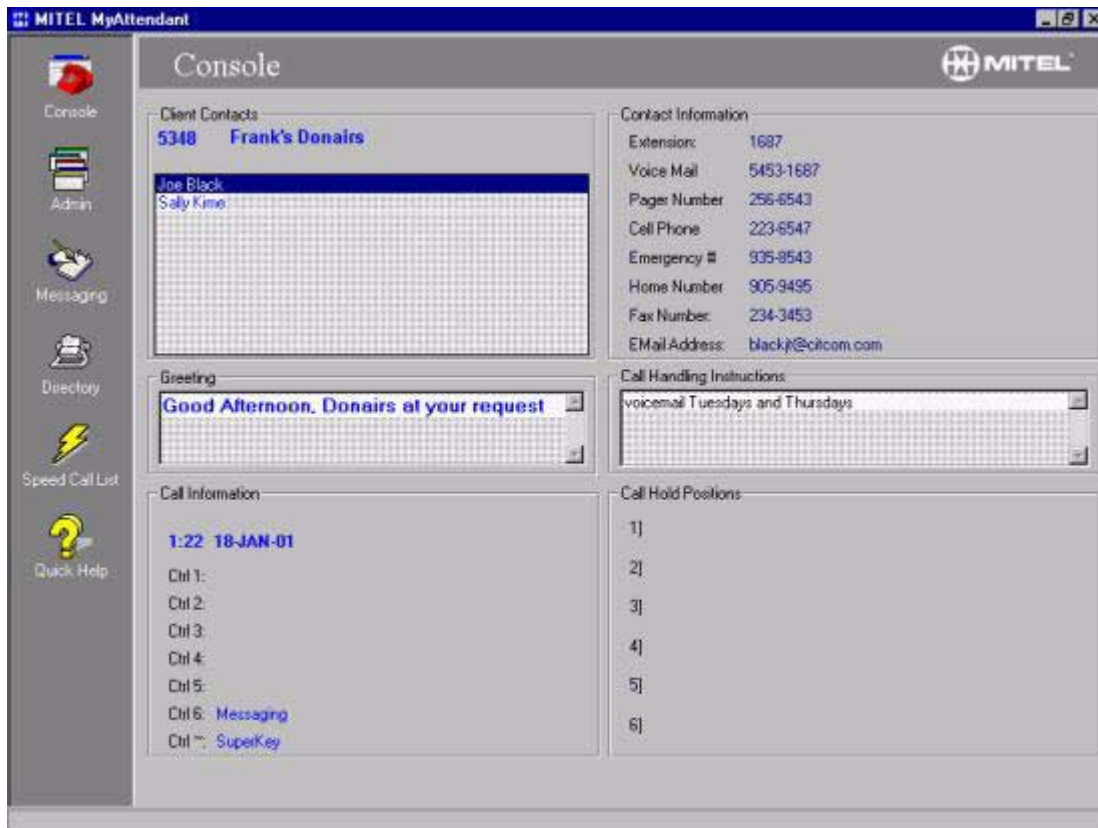
- A description of the call handling display (Console window)
- A list of the call handling keys.

This section also provides the steps necessary to complete the following call handling tasks:

- Answer a call
- Place calls on hold and retrieve them
- Transfer a call
- Place a call.

The Call Handling Display

When MITEL MyAttendant detects a call, the Console window appears on the screen with the information about the person being called prior to the attendant answering the call.



The information on the call handling screen is grouped into specific areas:

The **Client Contacts** information field displays the name of client company being called and lists the contacts (employees) for that client company.

The **Contact Information** field displays the means of communication and the telephone numbers for the selected contact.

The **Greeting** box displays the appropriate greeting to say to a caller for the client being called.

The **Call Handling Instructions** box displays information on how to direct a caller specific to the contact selected. For example, the instructions may say to send all calls directly to Voicemail for the day.

The **Call Information** field shows the display of a telephone, that means, the date and time, as well as the telephone features that are available to you.

The **Call Hold Positions** field displays the calls being held on the six call hold positions.

The **Call Status** bar displays colors indicating the state of a call on your console. The status bar is at the bottom of the screen and flashes red when there is an incoming call and is green when the call is connected.

You are able to direct calls with the mouse or with the keys on the keyboard.

Mouse-over Functionality

The Contact Information, Call Information, and Call Hold Positions fields offer “mouse-over” functionality. When the cursor from the mouse lands on a field with mouse-over functionality, the cursor changes to a hand. A single click on this hand, provides a short cut for that particular function. In the Contact Information field, this single click provides a quick dial; in the Call Information field, a short cut for the function key; in the Call Hold Positions field, a quick retrieve of a call on hold.

Keyboard Functionality

Selected keys on the keyboard provide all the call handling functions. When the MITEL MyAttendant application is the active window, these keys are dedicated to call handling. A list of these keys are listed on the next page.



Call Handling Keys

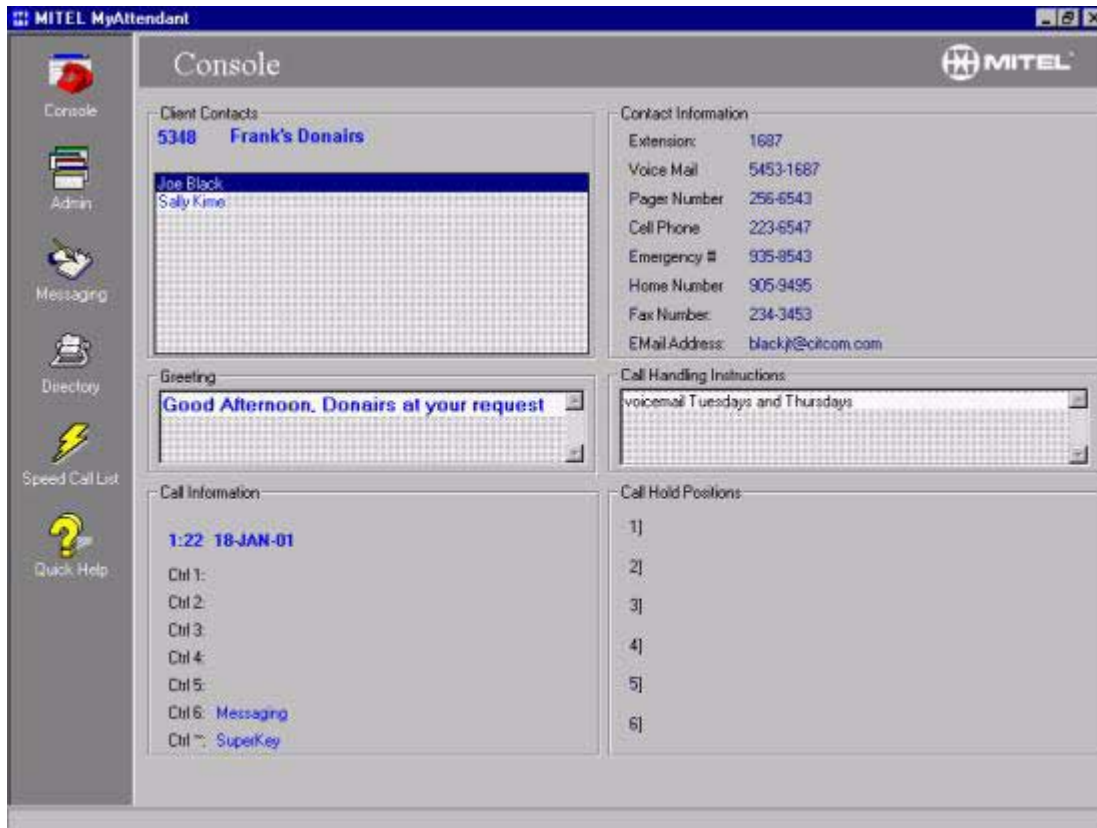
The call handling keys consist of the 12 function keys, Home, End, and the dial pad (or number pad) keys.

Key	Usage
F1	Hold Position 1
F2	Hold Position 2
F3	Hold Position 3
F4	Hold Position 4
F5	Hold Position 5
F6	Hold Position 6
F7	Field Dial – Home Number
F8	Field Dial –Emergency Number
F9	Field Dial – Cellular Phone
F10	Field Dial – Pager
F11	Field Dial – Voice Mail
F12	Field Dial – Extension
Home	Redial
End	Speedcall List
/	Retrieves the longest held call
*	Places a call on Hold on the first available hold position
+	Releases an incoming call
Enter	Answers an incoming call
0-9	Dials the digits 0 – 9
ALT * #	Dials the Digits * or #
CTRL Alt 0-9 * #	Sends the DTMF Tone for 0-9 * or #
CTRL ~	Acts as a Superkey on a SUPERSET telephone
CTRL and Alphanumeric 1-6	Acts as a softkey 1 - 6

Information on these keys can also be viewed by clicking on the Help icon from the Main screen.

Answer a Call

When an incoming call is presented to the PC, the Console window comes to the front of the screen and the status bar at the bottom of the screen will flash red. At the same time, the client information fields in the Console window will show information about the contact that the call is for. Before the call is answered, this window indicates how the caller should be greeted, and how the call should be handled once answered. This information remains on the Console window until another call comes in.



To answer a call

- Press the **ANSWER** (Enter) key.
The Call Status bar at the bottom of the screen turns from a flashing red to a solid green indicating that the call is connected.



To release (end) a call

- Press the **RELEASE** (+) key.
The Call Status bar returns to a normal state.



► **Note:**

You can store a message for a contact from the Console window after answering a call. Just click the contact name on the Console window, click the Messaging icon, click the New Message button, enter the message, and click OK. For more information about messaging, see Handling Messages.

Place a Call on Hold

The Console window has six hold positions available for placing calls on hard hold. This means that the call is held in its own position and the attendant is free to use the prime line for incoming and outgoing calls.

Function keys F1 – F6, represent the six hold positions.



To place a call on the first available hold position

- Press the **Hold** (-) key.

To place the call on a specific hold position

- Press the hold position function key (F1 – F6) specific for that position or mouse-over and click the hold position in the Call Hold Positions field.

The status of the six hold positions is displayed in the Call Hold Positions field of the Console window. The hold positions will indicate the client being called, as well as the desired contact (if one is selected from the Contact List).



Retrieve a Held Call

When a call is retrieved from a hold position, the contact information fields display information about that contact.

To retrieve the call that has been on hold the longest

- Press the **Retrve** (*) key.

To retrieve a call from a specific hold position

- Press the hold position function key (F1 – F6) specific for that position. For example, pressing F4 retrieves the call held on Call Hold Position four.

Transfer a Call

On an established call:

1. Enter the destination number with the dial pad, with the Speed Call List, with the **Redial** key, with the field dial keys, or with the mouse-over functionality. The caller will automatically be placed on soft hold while you dial the destination. External destination numbers require the external trunk access code (for example 9) followed by the destination number.

To cancel an incorrect dial, press the **Cancel** (Esc) key. You will be re-connected to the original caller.

2. When the call has been established (ringing or connected), press the **RELEASE** (+) key to connect the two calls
or
if desired, wait for the third party to answer, provide an introduction, and then press the **RELEASE** (+) key to connect the two calls.

The transfer is now complete.

Place a Call

Placing a call can be done manually with the dial pad



or automatically with the Directory window or Speed Call List window.

► **Note:**

- To release (end) a call, press the **RELEASE** (+) key. The connected call will be released. If there is a call on soft hold (being transferred) pressing the Release key will complete the transfer.
- To redial a number, press the **Redial** (Home) key.
- To cancel an incorrect call function, or to return to a call being transferred, press the **Cancel** (Esc) key.
- To correct a dialing error when an arrow prompt is present in the Call Information field, press the **Backspace** key.

Place a Call with the Dial Pad

1. On the right side of the keyboard, press the keys on the dial pad to dial the number. As the call progresses, the call status and digits dialed will be updated in the Call Information box. When off-hook or dialing, the status bar at the bottom of the screen will turn green.

► **Note:**

- To dial * or # use the **Alt** key with the * or # key.

Place a Call with Tones

When placing outgoing calls you may be required to send tones (DTMF tones).

Tones are required when you call a voicemail box, a pager, entering a calling card number, or dialing through an automated attendant system. These tones enable the system to route your call through a menu.

For example:

Thank you for calling ABC. For new services, please press "1". To inquire about your bill, press "2".

Tones may also be required to send information to the called party.

For example:

When calling a pager, the caller is prompted to "enter the numeric message, then press #". This numeric message (often a callback number) is then displayed on the pager.

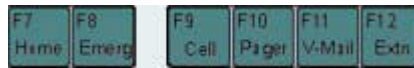
As a standard, the number pad on the PC console does not generate the tones required in the telecommunications world.

To send tones (DTMF) when on a call

1. Press **Ctrl** and **Alt** together while entering the digits (0-9, * or #) that you wish to send.

Place a Call with the Directory Window

1. On the Console window, click on the **Directory** icon or press **Alt D**. The Directory window opens.
2. Double click on the contact that you wish to dial. The Console window opens with the information of the contact.
3. Press the associated field dial function key (F7 – F12)



or on the Contact Information field, mouse-over and click on the desired number.

Place a Call with the Speed Call List Window

1. On the Console window, click on the **Speed Call** icon or press the **Speed (End)** key. The Speed Call List window opens.
2. Select the number you wish to dial by clicking on the selection, by arrowing down to the number you wish to dial, or by beginning to type the name of the contact. The speed call name and number is highlighted.
3. Press **Enter**, or double click on the speed call entry. MITEL MyAttendant dials the speed call number.

Handling Messages

Introduction

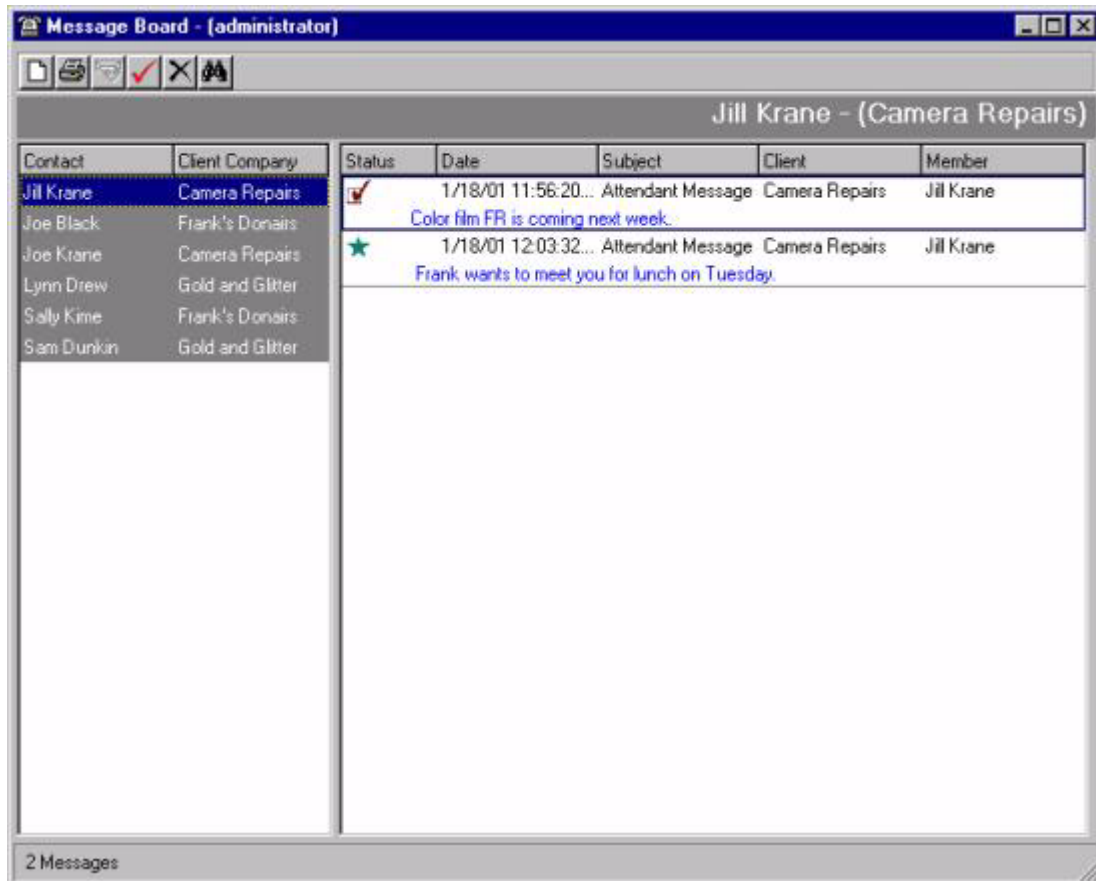
The MITEL MyAttendant application provides a Message Board that allows you to act as a message center for your clients and their contacts. Messages are stored for the number of days specified in the Client Profile for the recipient. The Message board allows you to manage the messages for your clients effectively.

This section provides a description of the Message Board and the steps necessary to complete the following messaging tasks:

- Create a Message
- Edit a Message
- Mark a Message
- Display a Message
- Delete a Message
- Print a Message
- Email a Message (optional)
- Find a Message

The Message Board





The Message Board provides a complete set of messaging functionality. The Message board lists all of the contacts and their client company plus the messages for the selected contact. This board also has a message toolbar with six buttons that allow you to create, print, email, mark, delete and search for messages. The bottom of the screen shows the number of messages for the selected contact.




To display the Message Board


- Click the **Messaging** icon on the Console window or press **Alt M**.

The messages on the message board show the status of the message, date and time of the message, the subject (default is Attendant Message), who the message is for, and the first line of the message.

Icon	Status
	New Message
	Message has been delivered to contact
	Message has been printed
	Message has been emailed


The messages are displayed in a list format

-  1/18/01 11:56:20... Attendant Message Camera Repairs Jill Krane
Color film FR is coming next week.

-  1/18/01 12:03:32... Attendant Message Camera Repairs Jill Krane
Frank wants to meet you for lunch on Tuesday.

or in a card format.

Thursday January 18, 2001 at 11:56:20 AM

Status: 


Subject: Attendant Message

Message: Color film FR is coming next week.

Client: Camera Repairs

Member: Jill Krane

Thursday January 18, 2001 at 12:03:32 PM

Status: 

Subject: Attendant Message

Message: Frank wants to meet you for lunch on ...


Client: Camera Repairs

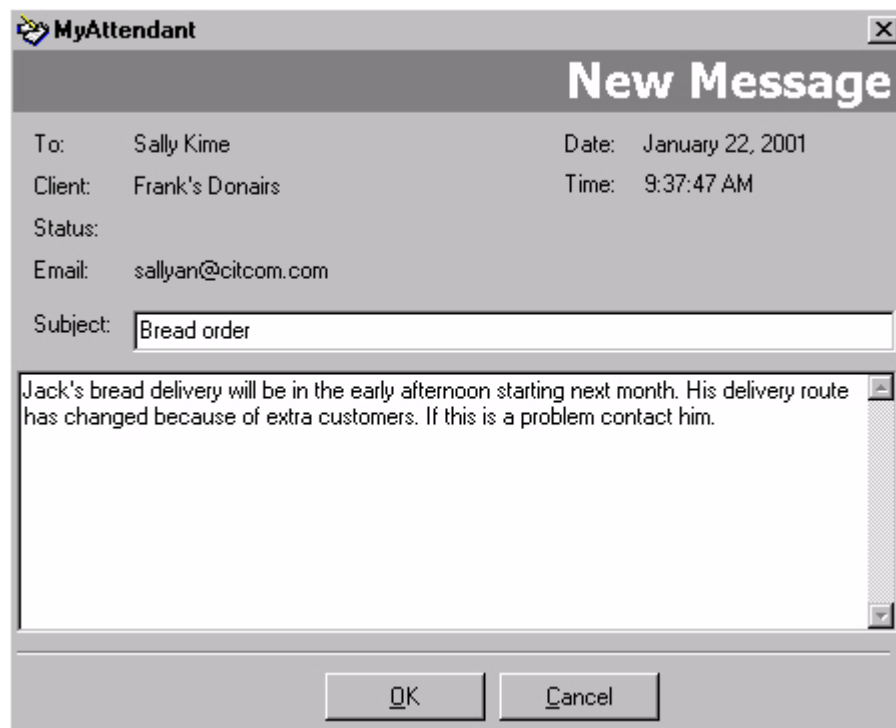
Member: Jill Krane

The message toolbar on the top right of the Message Board allows you to manage and manipulate the messages. The six buttons on the message toolbar allow you to create, print, email, mark as delivered, delete, and search the messages.



Create a Message

1. Click on the Messaging icon to open the Message Board.
2. From the list of contacts on the Message Board, click the contact name of the person who will receive the message.
3. On the message toolbar, click the New Message button.  A New Message window opens.



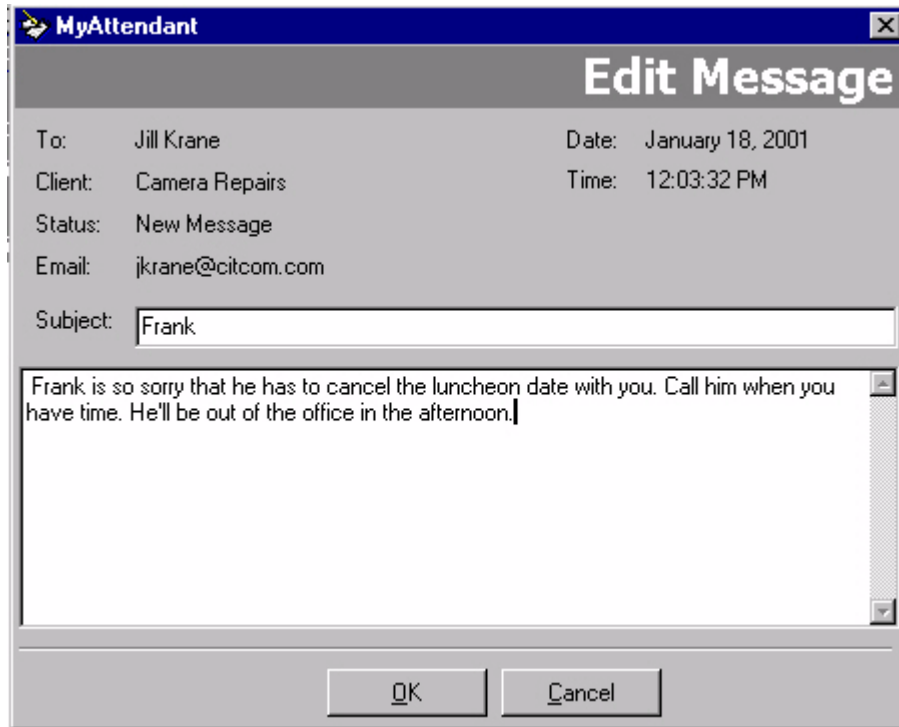
4. In the New Message window, enter a subject for your message and type the message.
5. Click **OK**. The Message Board shows the message with a star icon to indicate a new message.

► **Note:**

You can create a message for a contact from the Console window after answering a call. Just click the contact name on the Console window, click the Messaging icon, click the New Message button, enter the message, and then click OK.

Edit a Message


1. From the list of contacts on the Message Board, click the contact name for the message you wish to edit. The Message Board shows all of the messages.
2. Double click on the message you wish to edit. The Edit Message window opens.



3. Enter the changes.
4. Click **OK**. The Message Board shows the edited message with a star icon to indicate a new message.

Mark a Message

Messages are automatically marked with a status icon when the message is created, printed, or emailed. After you deliver a message, you can mark the message as delivered with a check mark.

1. From the list of contacts on the Message Board, click the contact name for the message that you wish to display. The Message Board shows all of the messages.
2. Click on the message that you wish to mark.
3. On the message toolbar, click the Delivered button.  The status icon on the message will change to a check mark.


Display a Message

1. From the list of contacts on the Message Board, click the contact name for the message that you wish to display. The Message Board shows all of the messages.
2. Double click on the message you wish to read. The Edit Message window opens with the complete message.

▶ **Tip**

To change the message display format on the Message Board, right click on a message and select the list view or the card view.

Delete a Message

1. From the list of contacts on the Message Board, click the contact name for the message that you wish to delete. The Message Board shows all of the messages.
2. Click on the message that you wish to delete.
3. On the message toolbar, click the Delete button.  A confirmation window opens.
4. Click **OK** to confirm the action.


▶ **Tip**

To delete more than one message, hold the **Shift** key down and click on all of the messages that you wish to delete, and then click the Delete button on the message toolbar.

Print a Message

▶ **Note:**


Printing a message requires the configuration of a printer.

1. From the list of contacts on the Message Board, click the contact name for the message that you wish to print. The Message Board shows all of the messages.
2. Click on the message that you wish to print.
3. On the message toolbar, click the Print button. 


Email a Message


▶ **Note:**

Emailing is a purchasable system option and requires the configuration of an email service.

1. From the list of contacts on the Message Board, click the contact name for the message that you wish to email. The Message Board shows all of the messages.
2. Click on the message that you wish to email.
3. On the message toolbar, click the Email button. 

Find a Message

1. On the message toolbar, click the Search button.  A Search window opens allowing you to search by contact name or client company.



The screenshot shows a dialog box titled "Enter the Search Criteria". The dialog has a dark blue header bar with the text "Enter the Search Criteria" in white. Below the header bar, the word "Search" is displayed in a large, bold, white font. The main area of the dialog is light gray and contains two buttons: "Contact Name" and "Client Company". To the right of each button is a text input field. At the bottom right of the dialog are two buttons: "Search" and "Cancel".

2. Click on the **Contact Name** button or the **Client Company** button.
3. Enter the name that the message belongs to.
4. Click **Search**. The Message Board shows the name highlighted with all of their messages.
5. Double click on the message you are searching for to obtain the complete message.

Quick Reference Guide for Call Handling



Task	Keyboard Action (Remember that you can use “mouse-over” for many of these tasks.)
Making Calls	Dial the number from the numeric keypad.
Answering Calls	Press the Enter Key.
Transferring Calls (Supervised Transfer)	When on a call, dial the destination number (The original caller is automatically placed on soft hold). To release the original caller into the transfer, press the RELEASE (+) key on the numeric keypad. To cancel the destination call and return to the original caller, press the Cancel (Esc) key.
Releasing a Call	To release a call being transferred, press the RELEASE (+) key
Ending a Call	Press the RELEASE (+) key on the numeric keypad
Canceling a Call	Press the Cancel (Esc) key.
Generating DTMF Tones	To send DTMF Tones over an established call, press the Ctrl and Alt keys with the digit you wish to send (Tones 0-9, *, #).
Dialing * and #	To dial the digits * and # as dialed digits (in-band), press the ALT key and the * or # key.
Dialing By Field	To dial the number that appears in any of the contact information fields, press the appropriate Function Key (F7- F12).
Placing Calls on Hold	To place a caller on hold, press the function key associated with a specific Hold Position, or press the red Hold (Number pad “-”) key to place the call in the first available hold position.
Retrieving Held Calls	To retrieve a specific call, press the Function Key (F1 – F6) associated with the held call you wish to retrieve. To retrieve calls in the order that they were placed on hold (i.e. First-In, First-Out) press the green Retrv (number pad “*”) key.