MITEL

MyAttendant™

Administrator Guide

MITEL

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MITEL MyAttendant Administrator Guide
PN 50000901
Software Release 4.0
March 2001

Administrator Guide

Appendix A. Configuration Sample

Administrator Guide

Who This Guide is For

This guide is written for a person familiar with telecommunications, Windows Applications, and the operation of the SX-200® PBX.

This guide provides instructions for the administration of the MITEL® MyAttendant™ application. Typical System Administrator duties include adding and changing client information such as greetings, contact information, as well as maintaining the Speed Call and Attendant lists. In order to administer the system, you must be logged in with Administrator privileges.

What This Guide Contains

This Guide provides a description of the Administration Tool window and the administrative tasks that are performed with it.

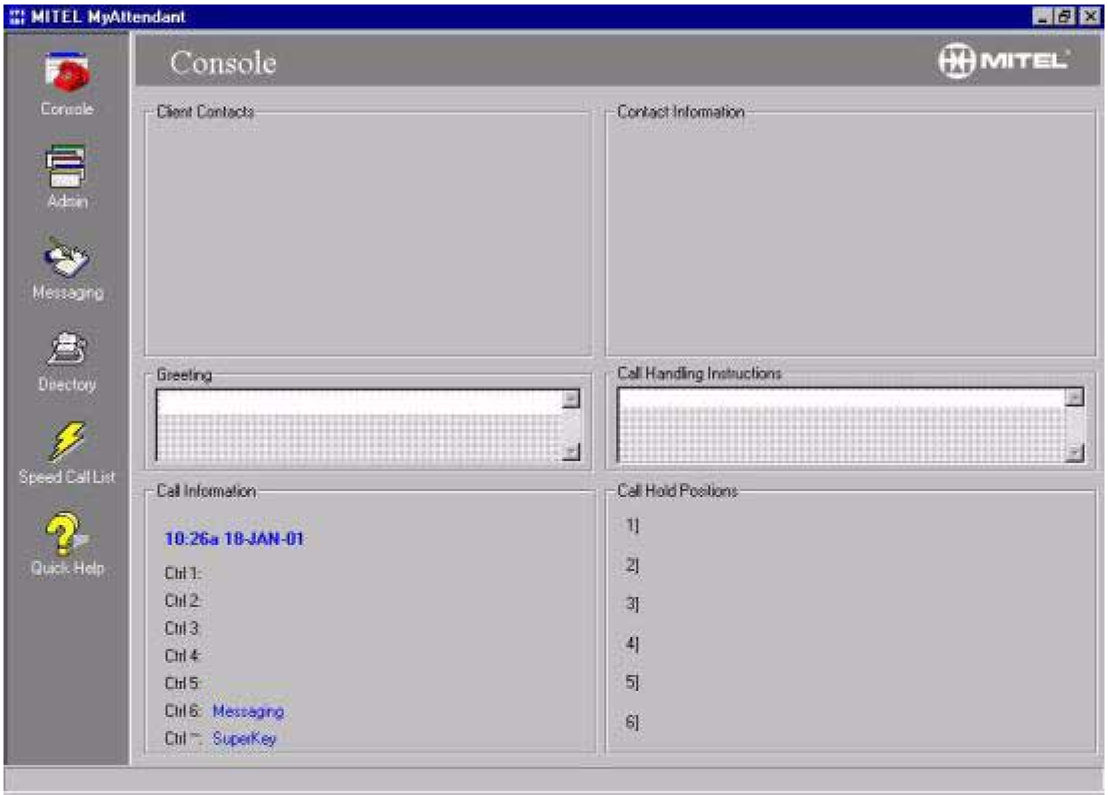
The guide contains the following sections:

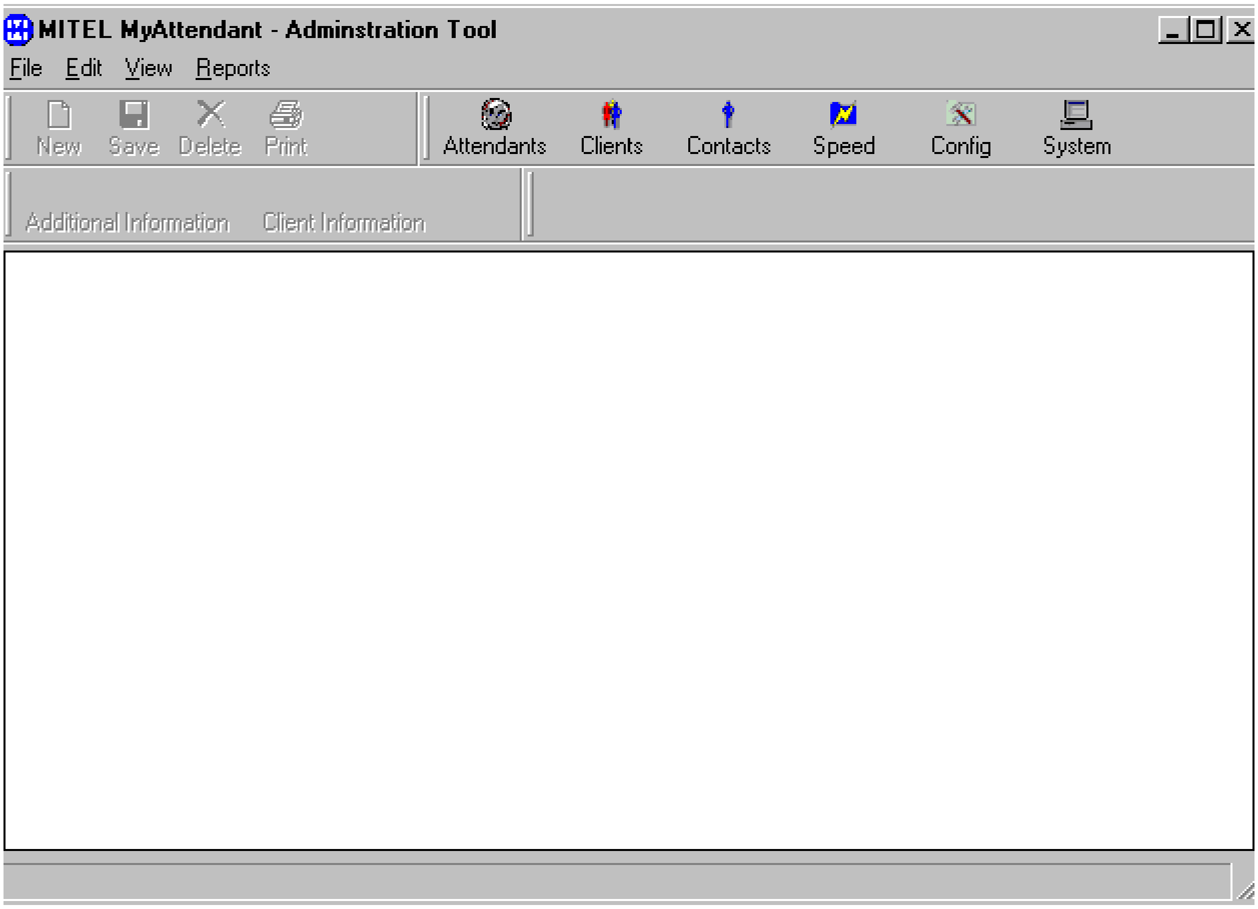
- Overview of the Administration Tool Window
- Configuring the Console
- Administering Attendants
- Administering Clients
- Administering Contacts
- Administering Speed Calls
- Checking the System

Overview of the Administration Tool Window

Accessing the Administration Tool Window

Use the Console window to access the Administration Tool window. Clicking the Admin icon on the Console window, or pressing ALT-A opens the Administration Tool window.





The Menu Bar

The menu bar has File, Edit, View, and Reports.

File - allows you to print and close the application.

Edit - allows you to add or delete a record and lets you cut, copy, and paste.

View - allows access to the six administration screens.

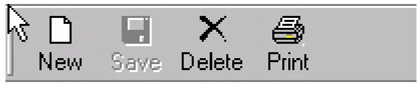
Reports - allows you to print and export records.

The Administration Toolbar

The Administration toolbar lets you navigate around the Administration Tool.

This toolbar has six buttons that allow you to access the six Administration screens.

The Administration toolbar also has four buttons that allow you to add, save, delete, and print records.

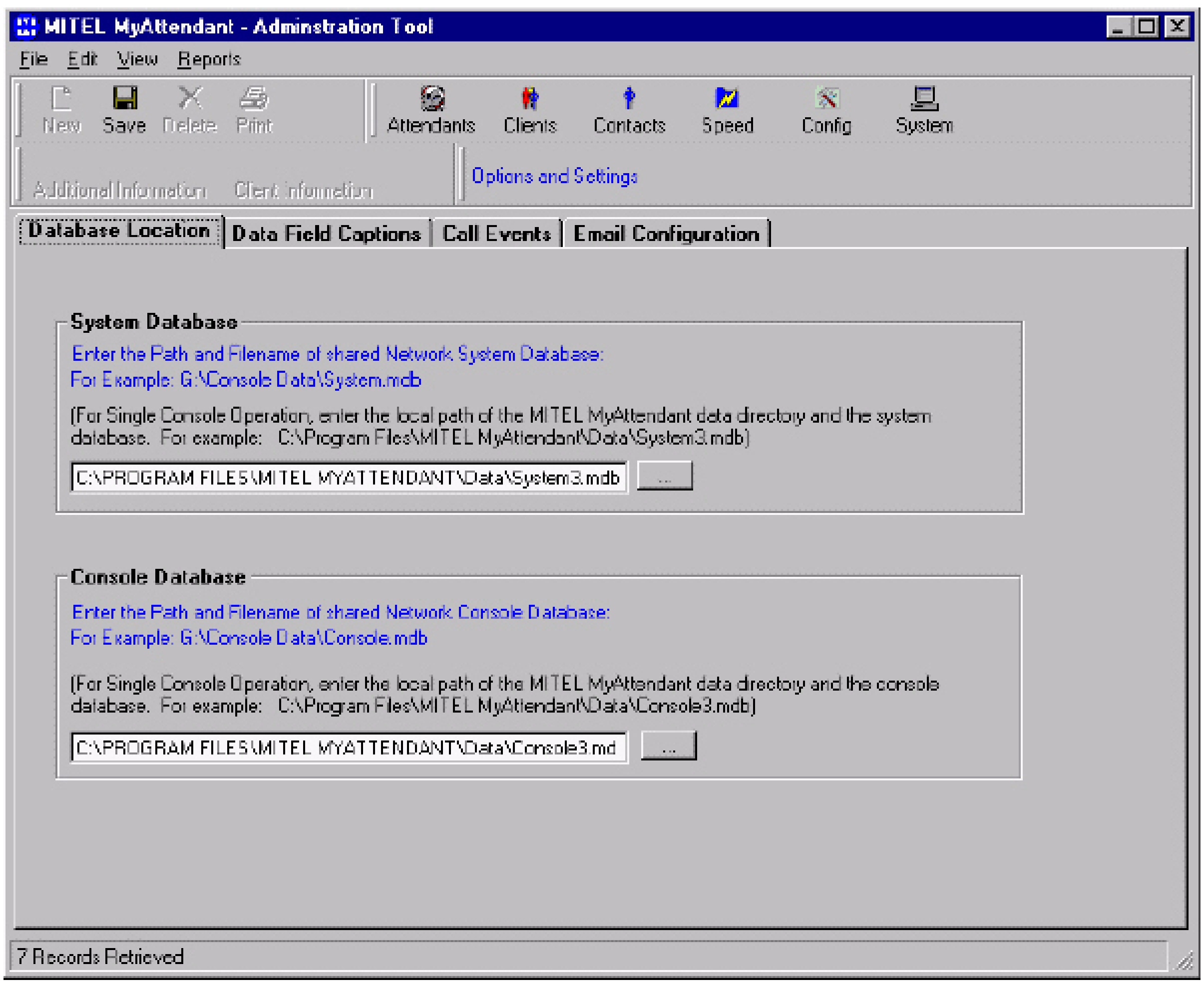


Configuring the Console

How the console operates will be different for each location, and possibly for each computer. To configure or customize the application, click on the Config icon on the Administration toolbar.

The Configuration screen is divided into four different tabs or sections.

- Database Location
- Data Field Captions
- Call Events
- Email Configuration



Database Location

- Enter the location of the system database and the console databases.

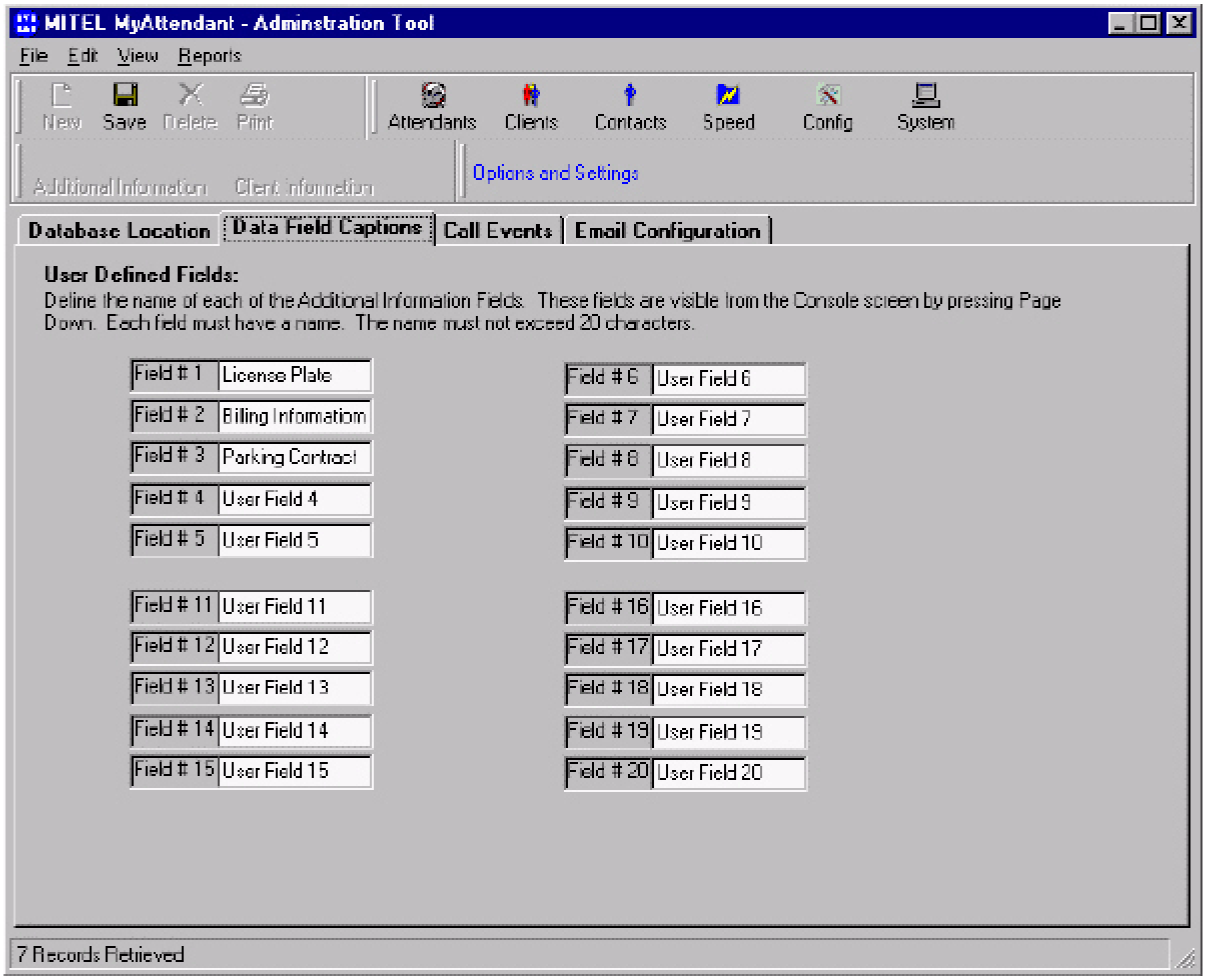
Two databases are required for the console to operate properly: System3.mdb and Console3.mdb. If your office has more than one console that needs to share client, speed call, messaging, and login information, then the databases will need to be placed in a common location, or shared drive. To share a database between consoles, set the console and system database to a common location.

Tip:
For help with networking in Windows 95 see Appendix A.

In the event of a network failure, change these locations to be the location of the console on your PC. A copy of the database will be stored there. Typically, this will be C:\Program Files\MITEL MyAttendant\Data\Console3.mdb). These settings can be saved by clicking “Save” on the Admin toolbar. Note: These settings apply to a single console only. They must be set at each individual console.

Data Field Captions

- Enter names for the Additional Information fields, and click Save on the Administration toolbar.



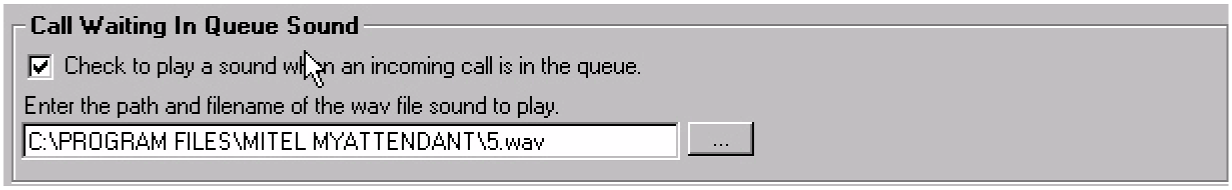
These names (entries) should define the content for the additional information field. These names will be the labels for the user fields that are displayed in the Additional Information window under Client Profiles. The additional information for the client company displays from the Console window when the Info 2 (Page Down) key is pressed. This additional information is shown to all consoles sharing the Console.mdb database.

Call Events

- Define the behavior of the console (for example: sound and screen) when an incoming call is received, and click Save on the Administration toolbar.

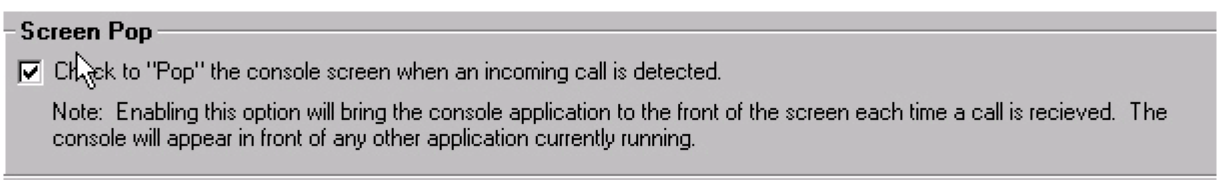
These settings apply to a single console only and must be set at each individual console.

Call Waiting in Queue Sound -This setting determines whether or not an audible sound is heard when there is a call waiting in the queue to be answered. The sound will be played when all logged in consoles are busy and another call enters the queue. To enable this option, check the box labeled “Check to play a sound when an incoming call is in the queue.” A different wav file can be selected by entering the path and filename.

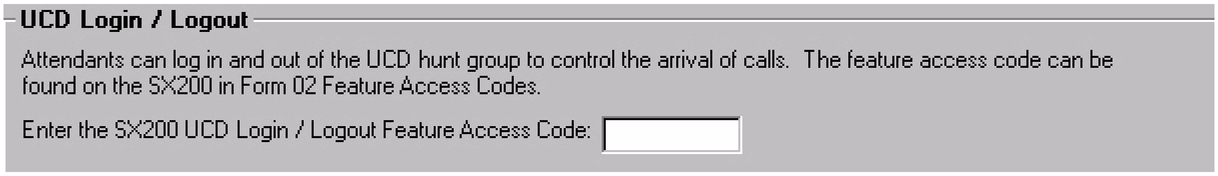


Sound Source - This setting selects your source for the sound. You cannot control the speaker volume if you select the PC speaker. If you change the default setting, you must re-boot the PC for the change to take effect.

Screen Pop - This setting determines whether or not the console application comes to the front of the screen each time a call is received. The console will appear in front of any other application currently running. If this option is not enabled, the attendant will have to click on the Windows task bar to bring the console application to the front, before answering a call.



UCD Login / Logout - Uniform Call Distribution (UCD) concentrates incoming trunk traffic onto one or more special attendant hunt groups. The console logs the attendant into, and out of, this hunt group by dialing the login code. This login code must be the same as the access code programmed in the SX-200 PBX in CDE Form 02 for Feature Number 38, UCD Agent Login/Logout.



Attendants answer the calls. If all attendants are busy, the caller camps on. The caller retains his position in the queue. Attendants must be logged into the UCD group in order to receive these calls.

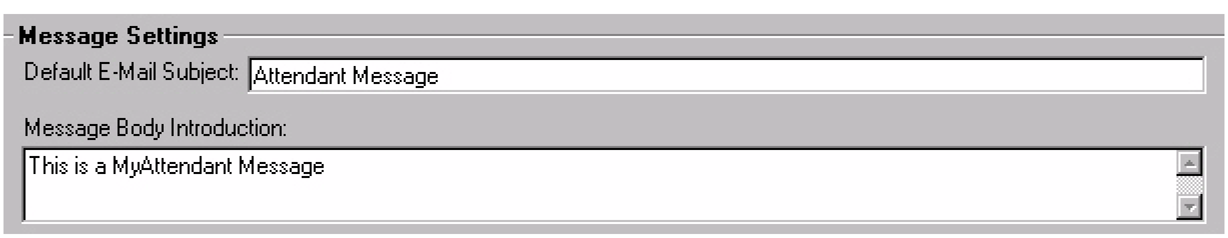
E-Mail Configuration

- If the MOSS option for email has been purchased, set up the console to allow the attendant to email messages to their clients, and click Save on the Administration toolbar.

These settings apply to a single console only and must be set at each individual console.

E-Mail Service - This setting defines whether or not the attendant will use an E-Mail service and if so what kind. The attendant can use an SMTP based service directly, or any other service you have configured using Microsoft Outlook 98, or Microsoft Outlook 2000, such as Microsoft Exchange, or Lotus Notes. Select the appropriate service, or select No-Email service if you do not wish to use E-Mail messaging.

Message Settings - This setting pre-defines a default E-Mail subject, and Message Body Introduction that will be included with each E-Mail sent from the attendant.



POP3 / SMTP Settings - These settings allow you to configure your E-Mail account, if you have selected SMTP as your E-Mail service. Your Internet / E-Mail service provider provides you with the information for these settings.

POP3 User Name - Enter the login name for the Attendant E-Mail account.

POP3 Password - Enter the password for the Attendant E-Mail account.

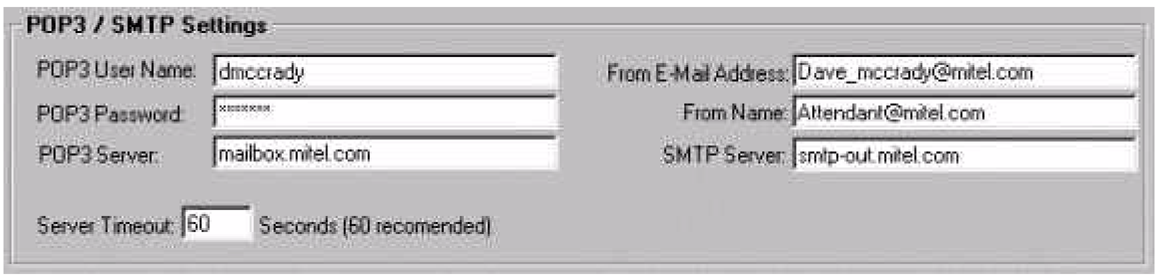
POP3 Server - Enter the POP3 server name provided by your service provider.

From E-Mail Address - Enter the attendant E-Mail address.

From Name - Enter the name that will be displayed on all sent mail.

SMTP Server - Enter the SMTP server name provided by your service provider.

Server Time-out - Enter the amount of time the console should wait for a response from the SMTP server (higher is usually better).

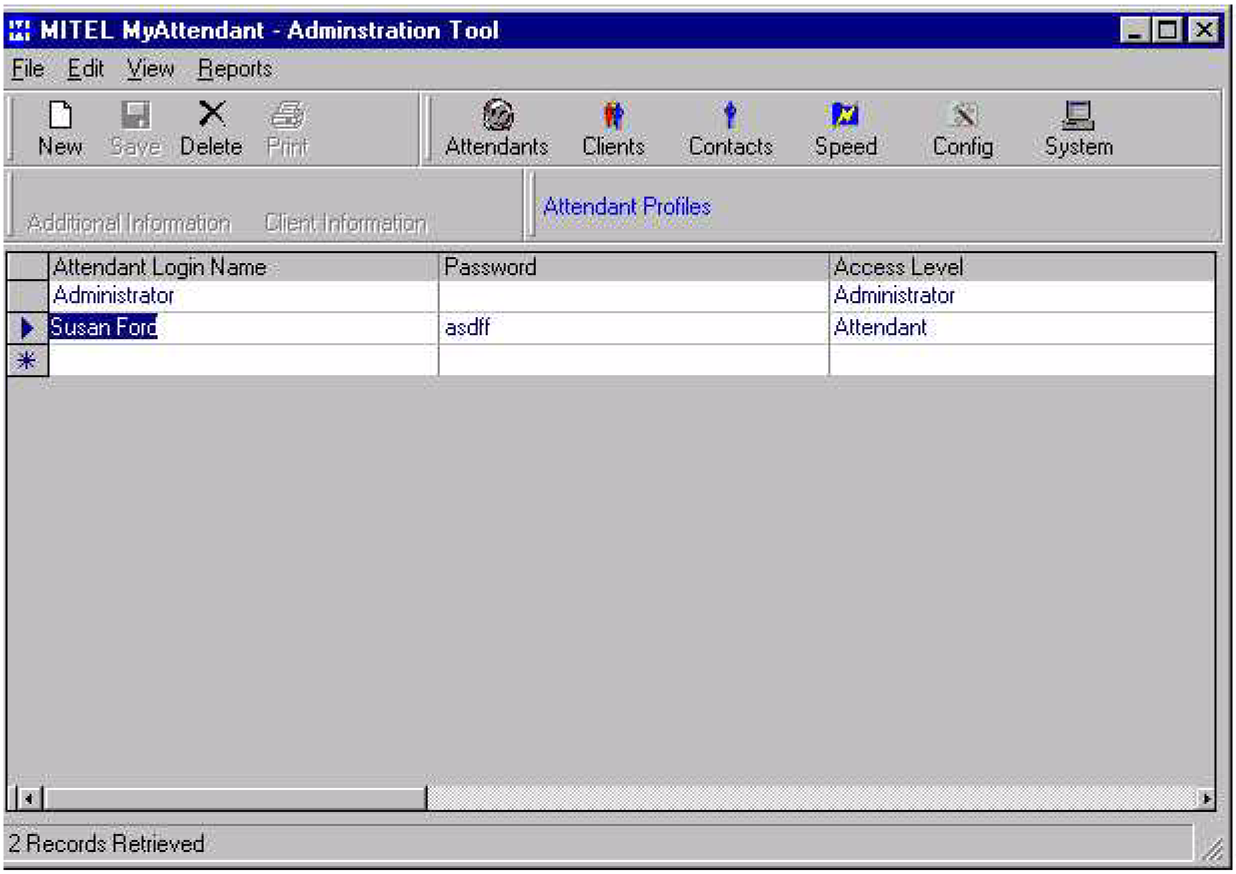


The above settings can be saved by clicking “Save” on the Administration toolbar. These settings apply to a single console only and must be set at each individual console.

Administering Attendants

Attendant Profiles

An attendant requires an attendant profile in order to use MITEL MyAttendant. This profile defines the login name, password (optional), and the access level.



When creating the profile, there are two possible access levels:

- Attendant
- Administrator

The **Attendant** access level provides all of the call handling and messaging functionality, but limits access to the administrative functions.
The **Administrator** access level provides full control of the attendant, client, and contact profiles, directory and speed call list, console configuration, plus all call handling and messaging functionality.

Create an Attendant Profile

1. On the Console window, click the **Admin** icon, or press ALT-A.
2. On the Administration toolbar, click **Attendants.**
3. On the Administration toolbar, click **New**. An Edit window opens.

4. Enter the required information.
5. Click **Save and Exit.** A new Attendant Profile is created.

Modify an Attendant Profile

1. On the Console window, click the **Admin** icon, or press ALT-A.
2. On the Administration toolbar, click **Attendants**.
3. Highlight the entry that you want to modify and double click on it. The Edit window opens.
4. Make the necessary changes.
5. Click **Save and Exit**.

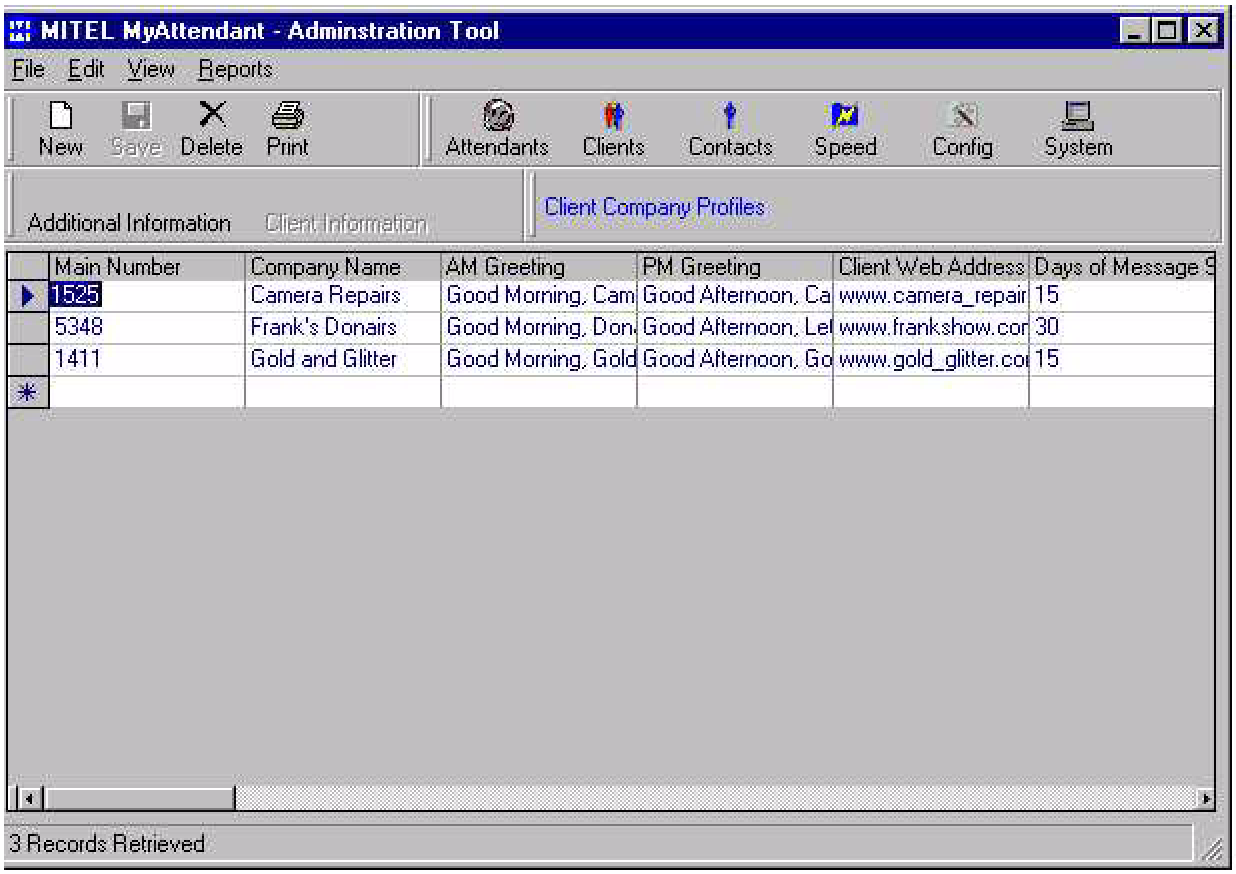
Delete an Attendant Profile

1. On the Console window, click the **Admin** icon, or press ALT-A.
2. On the Administration toolbar, click **Attendants**.
3. From the list of attendants, click on the name that you wish to delete.
4. On the Administration toolbar, click **Delete**. A confirmation window opens.
5. Click **Yes**.

Administering Clients

Client Profiles

Each client (company) that MITEL MyAttendant serves must have a client profile in the client database. The client profile contains the main telephone number, company name, morning and afternoon greetings, the web address, and the number of days the messages are stored.



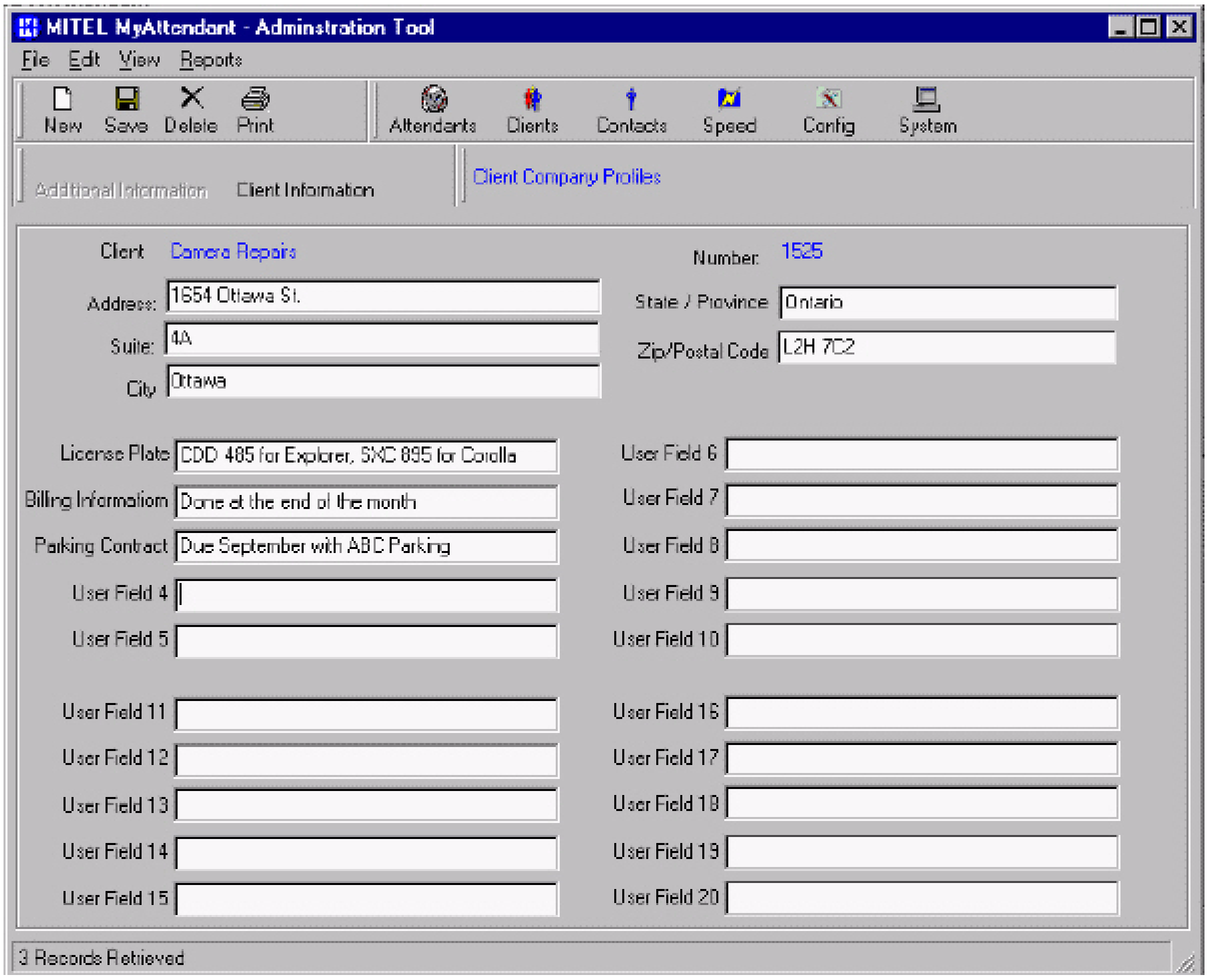
A client profile has one DN (directory number) associated with it. All of the people, or groups of people using that number are listed as “Contacts.” Each DID has a group of contacts associated with it.

The Client Company Profiles show the following columns:

- **Main Number** - the most important piece of information about a client. The main number should be the last four-digits of the telephone number (DN) belonging to the client (company). Note that some systems will be set up to a different number of digits. Also note that the number of digits that you put in this field must match the number of digits appearing in the top line of the Call Information box when an outside call rings on your console.
- **Client Name** - the name of the company or organization belonging to the client.
- **AM Greeting** - the custom greeting that will appear in the Greeting box of the application when a call comes in for this client in the morning.
- **PM Greeting** - the custom greeting that will appear in the Greeting box of the application when a call comes in for this client in the afternoon.
- **Web Address** - the URL of the Internet web site belonging to the client.
- **Days of Message Storage** - the number of calendar days that a message is stored for the contact. After this time period, the messages automatically delete.

The Client Company Profile window also has a field labelled Additional Information and Client Information. This field enables you to toggle back and forth between the Client Information and the Additional Information.

The Additional Information window stores other information about the Client Company. Twenty user fields can be customized to hold company information in an orderly fashion. The headings for these fields are defined in Data Field Captions under Configuring the Console.



Create a Client Profile

1. On the Console window, click the **Admin** icon, or press ALT-A.
2. On the Administration toolbar, click **Clients**.
3. On the Administration toolbar, click **New**. An Edit window opens.

4. Enter the client information.
5. Click **Save and Exit**.

Add Additional Information

1. On the Console window, click the **Admin** icon, or press ALT-A.
2. On the Administration toolbar, click **Clients**.
3. Click on the Client Profile that requires additional information.
4. Click **Additional Information**. The Additional Information window opens.
5. Enter the additional information.
6. Click **Save**.

- **Notes:**
  1. Headings for the user fields are defined in Data Field Captions under Configuring the Console.

  2. This additional information is displayed when you press the Info 2 (Page Down) key when the Console screen is open.

Modify a Client Profile

1. On the Console window, click the **Admin** icon, or press ALT-A.
2. On the Administration toolbar, click **Clients**.
3. Highlight the entry that you wish to change, and double click on it. An Edit window opens.

4. Enter the changes.
5. Click **Save and Exit**.

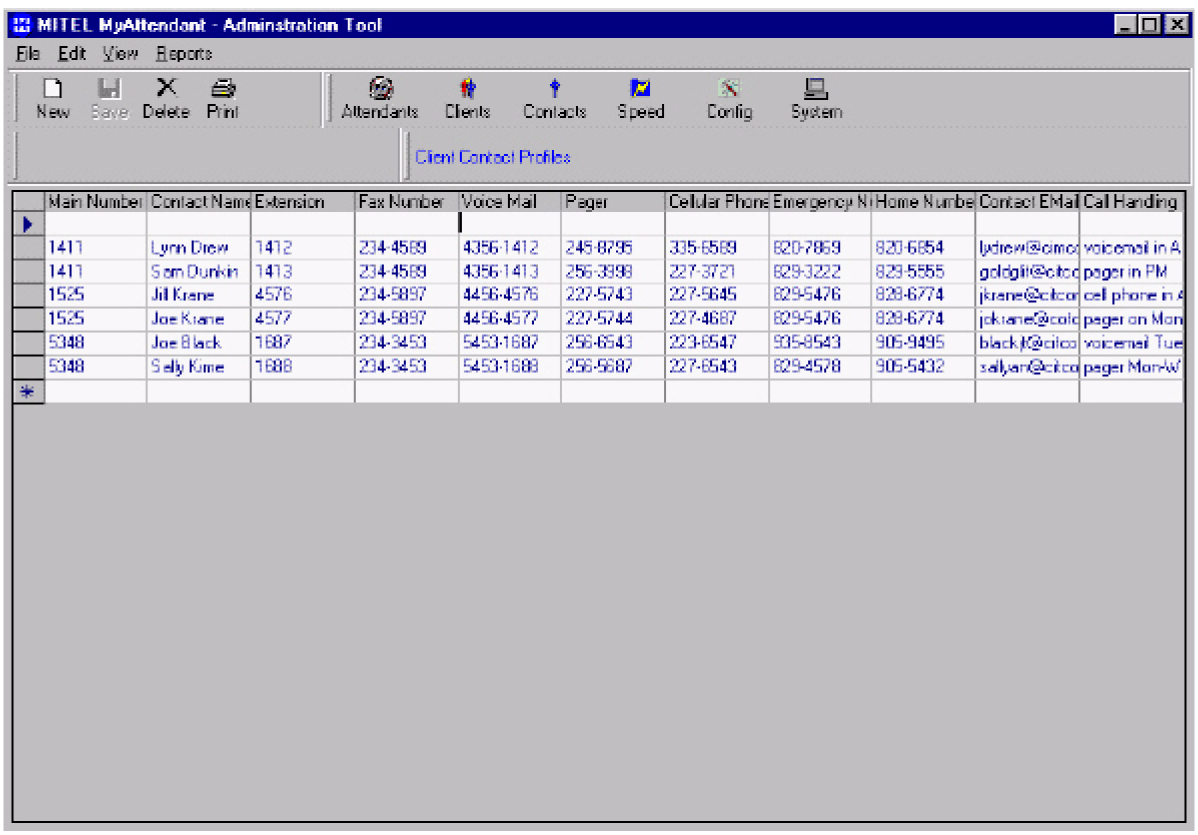
Delete a Client Profile

1. On the Console window, click the **Admin** icon, or press ALT-A.
2. On the Administration toolbar, click **Clients**.
3. Click on the client profile that you wish to delete.
4. On the Administration toolbar, click **Delete.** A confirmation window opens**.**
5. Click **Yes**.

Administering Contacts

Contact Profiles

Contacts are the people (or group) that work for the client (company). Clicking on the Contacts icon on the Administration toolbar accesses the list of people.



The information entered in the Client Contact Profile is displayed in the Contact Information box on the MITEL MyAttendant Console window.

The Client Contact Profile shows the following columns:

Main Number - the same four-digit Main Number entered for the contact's client (company) in the Client Profile window.

Contact Name - the name of the contact person or group.

Extension - the extension number for the contact; calls are transferred to this number.

Fax Number - the telephone number for the fax machine belonging to the contact.

Voice Mail - the number to dial that will send a caller straight into the voice mailbox for the contact. For an ONS voicemail system, this will be the voicemail access code, and their extension. For a DNIC voicemail system, this will be the feature access code for Abbreviated Dial Access and the appropriate index number programmed in CDE Form 31.

Pager - the pager number for the contact. Callers can be transferred to a voice or numeric pager belonging to the contact. Be sure to include any required digits, that means, the trunk access code (e.g. 9), the area code, or pauses that may be required. Using the comma key inserts a pause.

Emergency - the number to call in case of an emergency involving this specific contact. Be sure to include any required digits, that means, the trunk access code (e.g. 9) or the area code.

Home No. - the home telephone number for the contact. This number is dialed if the contact would like calls transferred to their home. Make sure to include any leading digits that must be dialed to gain access to an outside line.

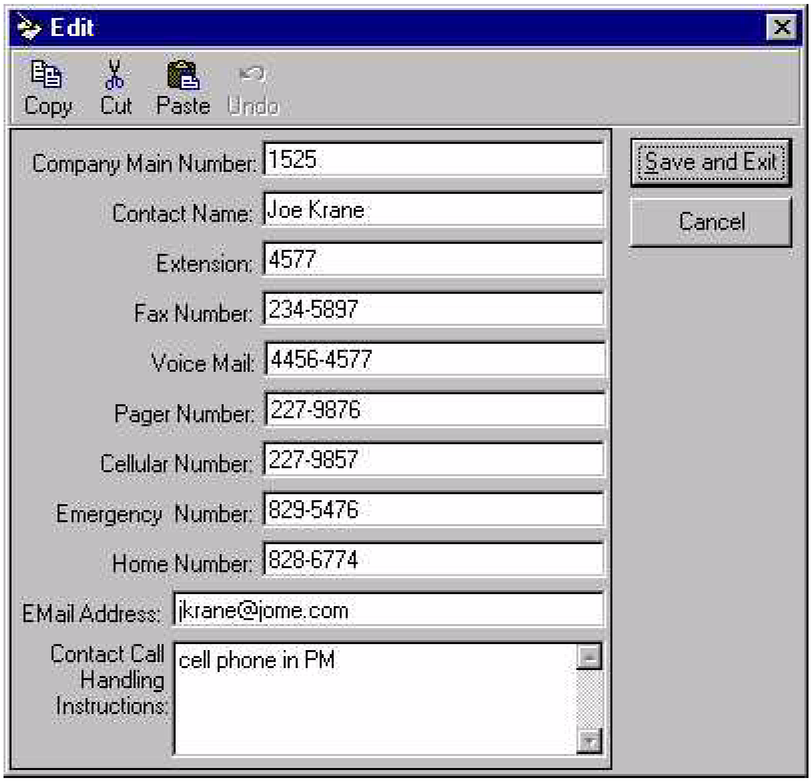
Email - the email address for the contact. The messages on the message board are sent to the contact using this email address.

Cellular Phone - the cell phone number for the client. Make sure to include any leading digits that must be dialed to gain access to an outside line.

Call Handling Instructions - the instructions that an attendant should follow when a call is received for this contact. Typically this instructs the attendant as to how the contacts would like their calls handled when they are not there, or are busy.

Create a Contact Profile

1. On the Console window, click the **Admin** icon, or press ALT-A.
2. On the Administration toolbar, click **Contacts**.
3. On the Administration toolbar, click **New**. The Edit window opens.



4. Enter the contact information. Be sure to include any required digits, that means, the trunk access code (e.g. 9), the area code, or pauses that may be required. Using the comma key inserts a pause.
5. Click **Save and Exit**.

Modify a Contact Profile

1. On the Console window, click the **Admin** icon, or press ALT-A.
2. On the Administration toolbar, click **Contacts**.
3. Highlight the entry that you wish to change, and double click it. An Edit window opens
4. Enter the changes.
5. Click **Save and Exit**.

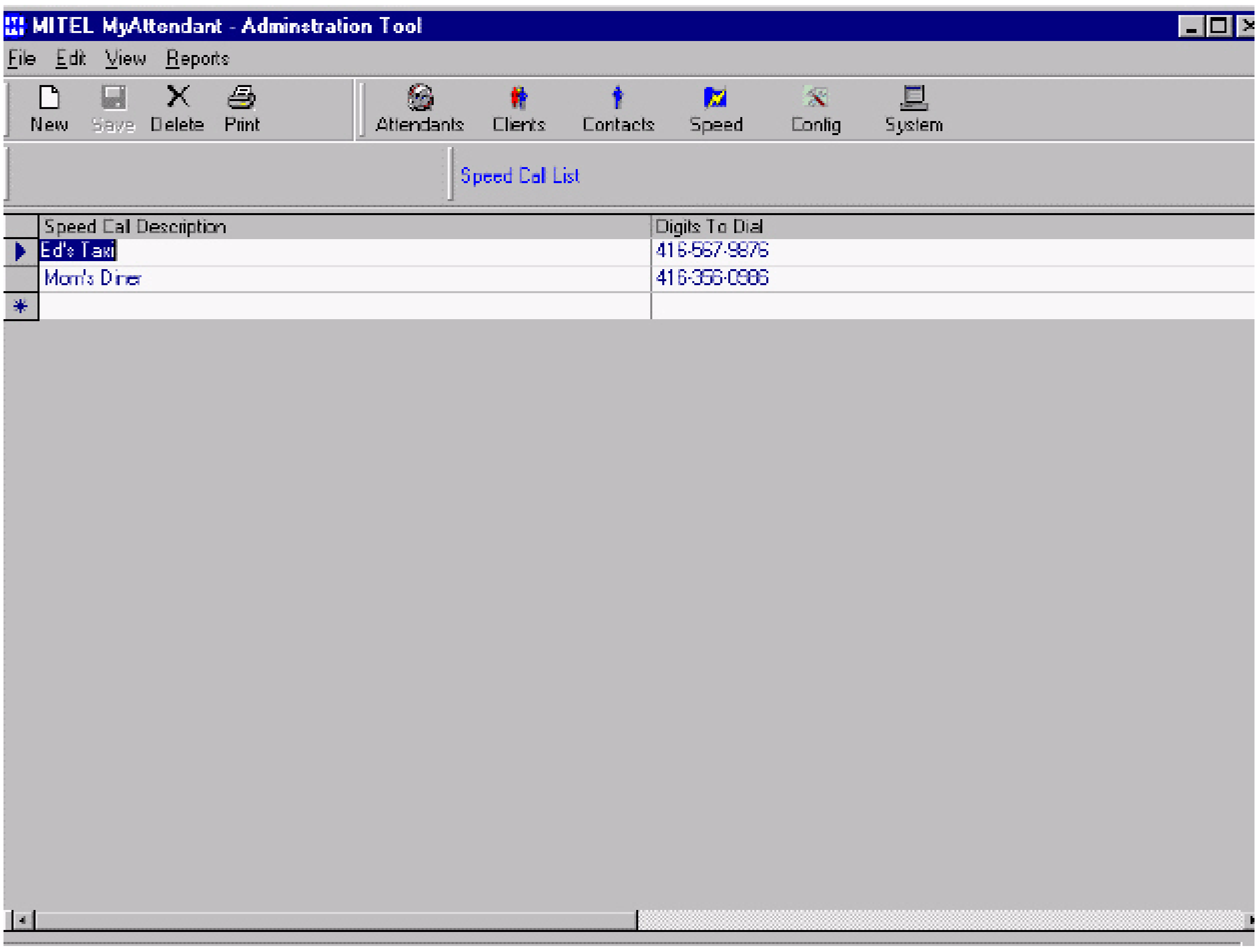
Delete a Contact Profile

1. On the Console window, click the **Admin** icon, or press ALT-A.
2. On the Administration toolbar, click **Contacts**.
3. Click on the contact profile that you wish to delete.
4. On the Administration toolbar, click **Delete.** A confirmation window opens.
5. Click **Yes**.

Administering Speed Calls

Speed Calls

Speed Calls are pre-programmed telephone numbers that can be dialed automatically from the MITEL MyAttendant Console screen. The list of speed calls act as a directory of frequently dialed numbers. To manage the speed call list, a system administrator can click on the Speed icon on the Administration tool bar. This action will display a list of all programmed speed calls. Speed calls are common to all consoles if they are sharing the same database on a network.



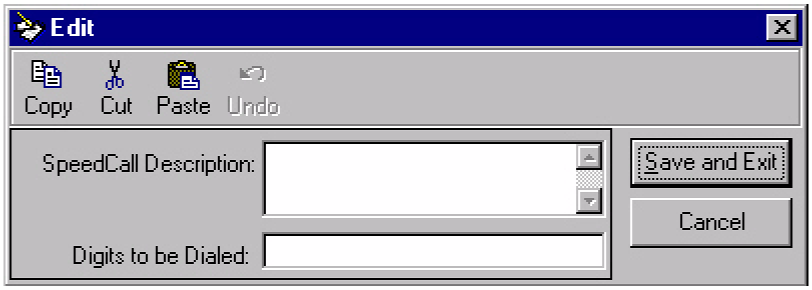
The Speed Call List shows the following columns:

Speed Call Description - The name or description of the person or group that will be called.

Digits to Dial - The phone number to be dialed. This number includes any required digits, that means, the trunk access code (e.g. 9) and the area code.

Create a Speed Call

1. On the Console window, click the **Admin** icon, or press ALT-A.
2. On the Administration toolbar, click **Speed**.
3. On the Administration toolbar, click **New**. An Edit window opens.



4. Enter the speed call description and digits. Be sure to include any required digits, that means, the trunk access code (e.g. 9) and the area code.
5. Click **Save and Exit**.

Modify a Speed Call

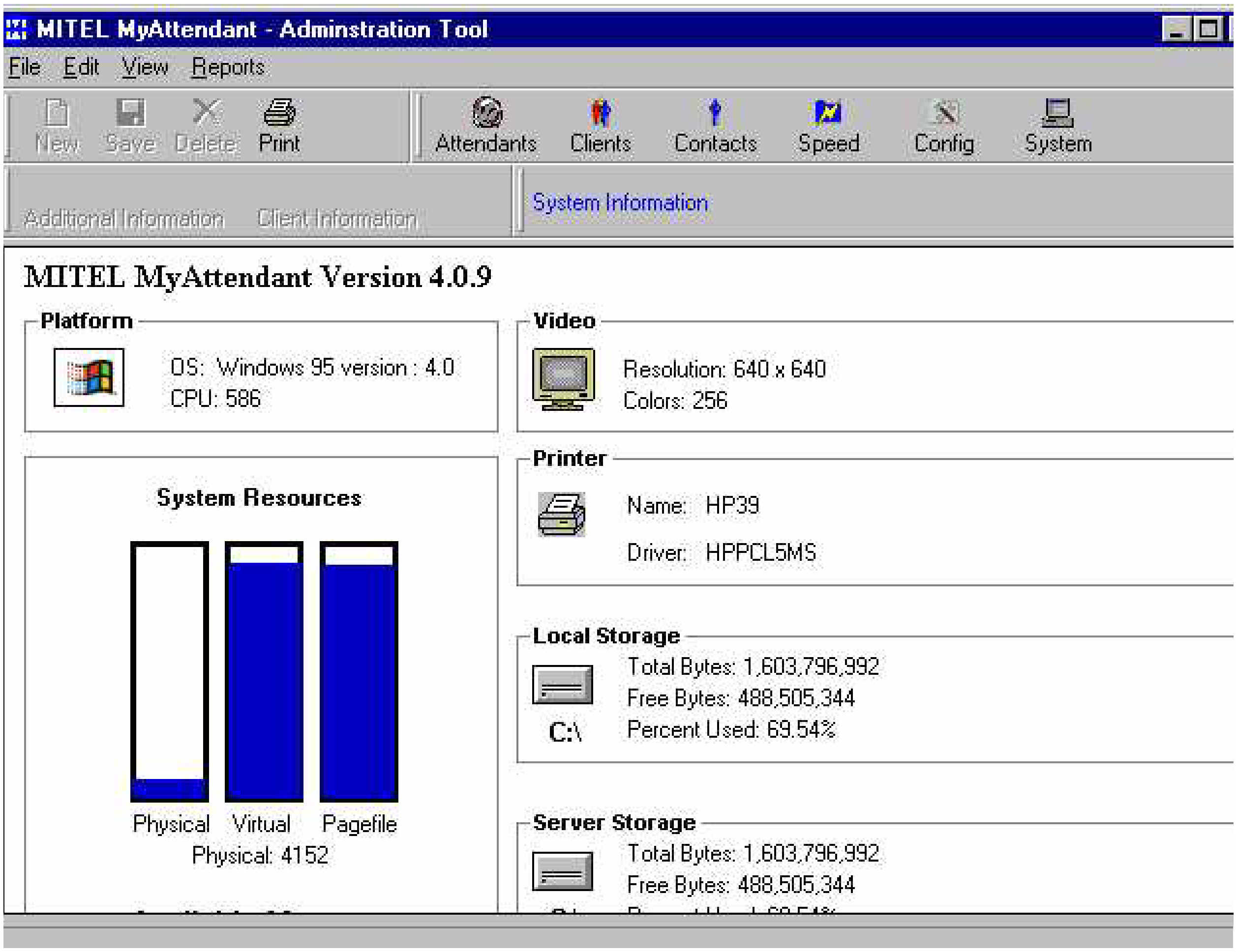
1. On the Console window, click the **Admin** icon, or press ALT-A.
2. On the Administration toolbar, click **Speed**.
3. Highlight the speed call that you wish to modify and double click on it. An Edit window opens.
4. Enter the changes.
5. Click **Save and Exit**.

Delete a Speed Call

1. On the Console window, click the **Admin** icon, or press ALT-A.
2. On the Administration toolbar, click **Speed**.
3. Click on the speed call that you wish to delete.
4. On the Administration toolbar, click **Delete.** A confirmation window opens.
5. Click **Yes**.

Checking the System

Clicking on the System icon on the Administration toolbar will bring you to a screen that will tell you all about the operating environment of your console. This can be very handy when troubleshooting the console installation.



Appendix A. Configuration Sample

Windows 95 Workgroup Setup

- Configure TCP/IP
- Add “Client for Microsoft Networks”
- File and Print Sharing
- Set the Computer Name and Workgroup
- Access Control
- Change a Password
- Create a New User

Assumptions:

Network Interface cards are installed and their drivers loaded.

The technician has connected the computers and printer to the hub.

Configure TCP/IP

1. Access Network Configuration settings by Start/Settings/Control Panel/Network.
2. Click the Configuration tab.
3. Click Add.
4. Click Protocol then Add.
5. Click Microsoft, then TCP/IP, then OK.
6. Click OK to reboot your computer. If you are asked about keeping a file, click Yes (Keep existing file).
7. Follow step one and two to get back to Network/Configuration.
8. Click TCP/IP and then Properties.
9. Click Specify an IP address.
10. Insert the appropriate IP address for your computer in the IP address text box. For computer one use IP address 193.0.0.101 for computer two use IP address 193.0.0.102 etc. (This will simplify installation of HP network printers).
11. Insert 255.255.255.0 (Class C default subnet mask) in the Subnet Mask text box for all computers.
12. Click OK to return to the configuration page.
13. Click OK to restart the computer. (If you are asked about keeping a file click “Yes”)
    OR
    If you need to do any other tasks listed at the start of this Appendix - read on before clicking OK. This just saves you the trouble of rebooting the computer many times.

Add Client for Microsoft Networks

1. Access Network Configuration settings either by Start/Settings/Control Panel/Network or right click the Network Neighborhood icon and select Properties.
2. Click the Configuration tab.
3. Click Add.
4. Click Client then Add.
5. Click Microsoft, then Client for Microsoft Networks, then OK.
6. Click OK to restart the computer. (You may be asked for the Windows 95 CD, be prepared. If you are asked about keeping a file click Yes.)
   OR
   If you need to do any other tasks listed at the start of this Appendix- then read on before clicking OK. This just saves you the trouble of rebooting the computer many times.

File and Print Sharing

1. Access Network Configuration settings either by Start/Settings/Control Panel/Network or right click the Network Neighborhood icon and select Properties.
2. Click the Configuration tab.
3. Click File and Print Sharing button.
4. Check both boxes then OK. File and Printer sharing for Microsoft Networks should appear in the configuration “Installed components” window.
5. Click OK to restart the computer. (You may be asked for the Windows 95 CD, be prepared. If you are asked about keeping a file click “Yes”)
   OR
   If you need to do any other tasks listed at the start of this Appendix- then read on before clicking OK. This just saves you the trouble of rebooting the computer many times.

File and Print Sharing (Part 2)

To have files show up in Network Neighborhood, you must share the directories. You can do this by sharing the whole drive or just the individual directories.

1. Access file manager by “Start/Programs/Windows Explorer.
2. Right click the directory you want to share.
3. Click Sharing from the menu.
4. Click the Shared As bullet. The Share Name will be the name that appears in Network Neighborhood. The Shared Name can be changed if needed. You have the ability to restrict access to files using Access Type and selecting Read-Only, Full (full access) or Depends on Password. Our recommendation is that for a workgroup environment you share the drive as Read-Only and provide Full Access to specific directories where needed.
   Note: If you share the drive, ALL directories and files are viewable by everyone on the network. If you have sensitive data do not share the drive.
5. Click OK to save your new settings. The Directory will now appear in Windows Explorer with a hand under its folder indicating that the directory is shared.

Set the Computer name and Workgroup

1. Access Network Configuration settings either by Start/Settings/Control Panel/Network or right click the Network Neighborhood icon and select Properties.
2. Click on the Identification tab.
3. Type in the new name for the computer in the Computer name text box (Computer one will be YOUSA1, computer two will be YOUSA2 etc. Note: the IP addresses match the computer name).
4. In the Workgroup text box, type in the name of the workgroup this computer will be joining.
5. Click OK to restart the computer. (You may be asked for the Windows 95 CD, be prepared. If you are asked about keeping a file click Yes)
   OR
   If you need to do any other tasks listed at the start of this Appendix - then read on before clicking OK. This just saves you the trouble of rebooting the computer many times.

Access Control

1. Access Network Configuration settings either by Start/Settings/Control Panel/Network or right click the Network Neighborhood icon and select Properties.
2. Click the Access Control tab.
3. Make sure Share-level Access Control is selected (User-level access control is used when your computers have access to a Network Domain).
4. Click OK to restart the computer (You may be asked for the Windows 95 CD, be prepared. If you are asked about keeping a file click “Yes”)
   OR
   If you need to do any other tasks listed at the start of this Appendix - then read on before clicking OK. This just saves you the trouble of rebooting the computer many times.

Change a Logon Password

1. Access Passwords by Start/Settings/Control Panel/Passwords.
2. Double Click the Passwords icon.
3. On the Change Passwords page click the Change Windows Password button.
4. Fill in the text boxes as indicated and click OK.

Create a New User

1. Access Users by Start/Settings/Control Panel/Users.
2. Double Click the Users icon.
3. Click the New User button and follow the steps as indicated.