

BT One Cloud Cisco Self Service (OCC)

Auto Attendant

Call Handler, Greetings, Schedules,

Transfer rules, Caller Input

User guide

Introduction

Auto Attendant is an overarching service that caters for the provisioning, configuration and management of Call Handlers, Greetings, Schedules and related dial plan components. Each section within the Auto Attendant can be broken down into three parts **Call Handler, Manage Greetings Files**, and **Schedules**.

BT's Best practice is to configure or **Add** in this order and to follow the steps in order of the document:

- 1. Create a Holiday Schedule.
- 2. Add Opening Hours Schedule.
- 3. Greetings.
- 4. Create Call Handler to select correct schedule.

However if only specific items need amending go click **HERE** for contents page.

The Naming convention should follow the below standards. This is for both ease of searching the Auto Attendants, and for potential fault finding.

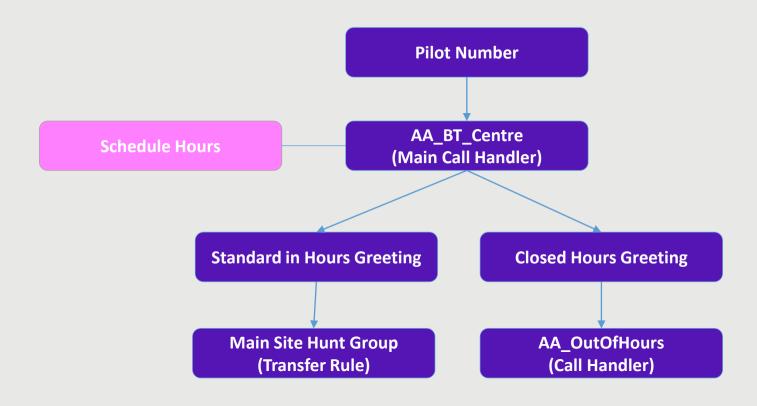
Example/s:

AA_SiteName_Main (This will correspond to the main site or pilot number)

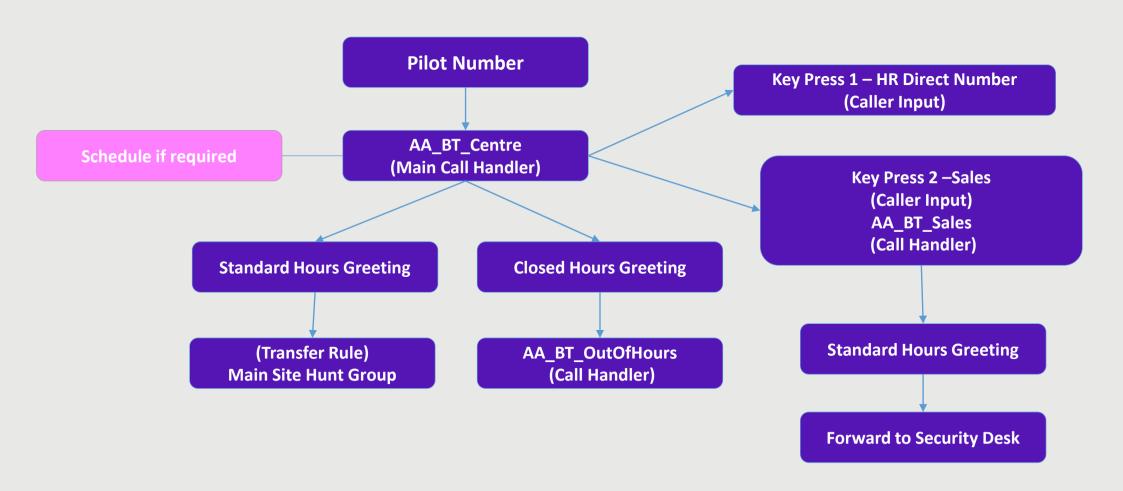
AA_SiteName_Call_fwd_to_greeting (This will correspond to the forward rule to the greeting created)

AA_SiteName_Call_fwd_to_VM (This corresponds to forward voicemail on the same voicemail (Unity) cluster)

Overview of an example Auto Attendant



Overview of a 'Generic' Auto Attendant



Administrator

As a One Cloud Cisco Administrator, you're able to make changes to the created Auto Attendant as per initially created order to BT. It is advised that any amendments or changes to existing Auto Attendant features should be 'copied' or 'made note of' first before amending. If you have any questions please seek advise from BT.

- Create and manage schedules
- Basics of Call Handler/s and Caller input
- Manage Greetings

Configurations that cannot be changed by the Administrator and require BT intervention are:

- Change Pilot Numbers
- Add or remove Call Handlers.

Contents

Click to view each section

View and access created Auto Attendant

Create a Schedule

Remove Schedule/s

Create a Holiday Schedule and amend

Create Open Hours Schedule and Amend

Call Handler/s

Transfer Rules

Caller Input

Greetings

Greetings Standard Hours

Greetings Off Hours Greeting

Alternative/emergency Greeting

Greeting Record/Playback

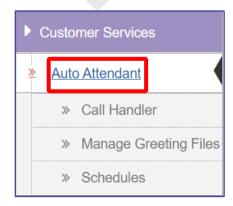
Upload Greeting

Manage Greeting Files

Delete Greeting Files

In the OCC Self Service Portal page. **Select** and open the **Features** tab , then **Select Customer Services**. Then **select Auto Attendant**

Home Users Hub Phones Admin List Event Log Requests Features Contact Us Release Notes Generate Reports Help/FAQs

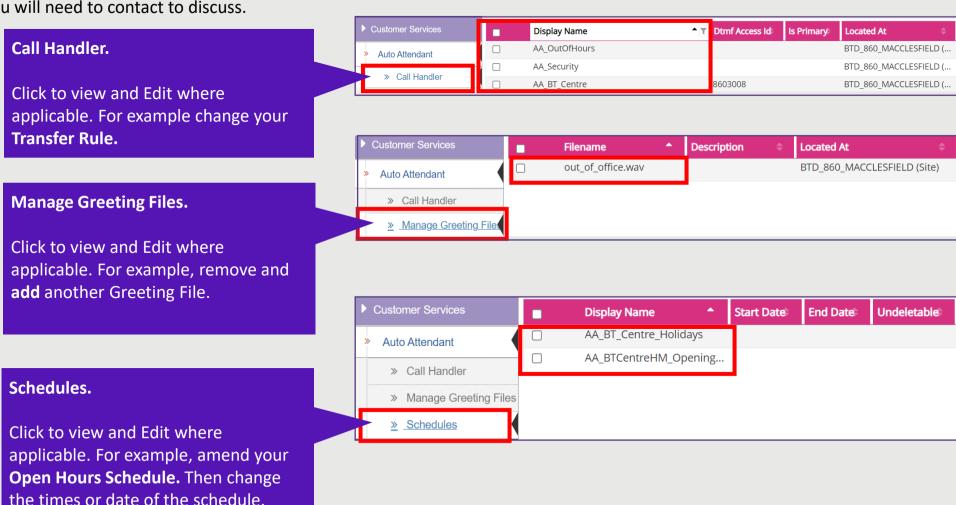


The below is an example setup of Auto Attendant on the OCC Platform. Please note depending on the order placed to BT it may differ.

If you need to View or Edit your Call Handler, Manage Greeting Files, or Schedules find them and click to view as per example below.

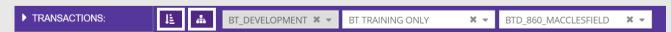
Please note. There will be parts that are 'greyed' out and can only be viewed and cannot be edited, and are only accessible

by BT and you will need to contact to discuss.



Create a Schedule

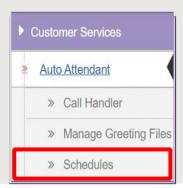
Be sure that when you are creating the schedule that the **Hierarchy** is at the correct level either at **Site level** or **Customer level**



Regional or country specific holidays create at the **site level**. If created at **Customer** level, you can select and use the schedule at multiple **sites**. However be sure to have clear descriptions if you are.

Create a Schedule

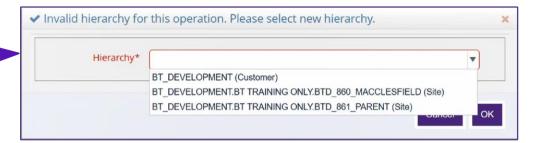
Select Schedules and Select, Add





Depending on the Hierarchy set, or your preference you will be presented at **Division level.**

You may get this option to **Add** at **Site** or **Customer level** instead.

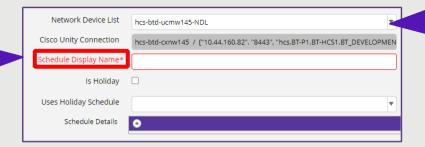


Create a Holiday Schedule

Create a **Schedule Display Name**, this will be the name of the schedule for your holiday/s.

For the **Scheduled Display Name**. Be sure to follow the naming convention.

AA_. As mentioned in the introductory slide

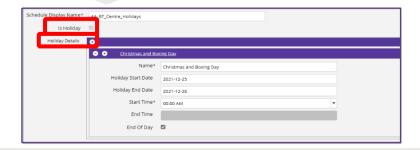


Network Device List will correspond to the various regions the organisation has around the world. For example, EMEA or APAC then you would set the Network Device List to the corresponding cluster the Auto Attendant will be built by. If you only have one cluster, then this option will be 'greyed' out and it will be at particular site.

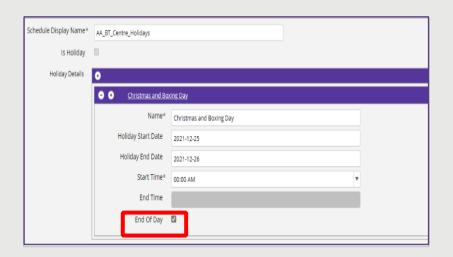
Once you have created a name for your **Schedule Display Name**.

Be sure to:

- 1. Tick Is Holiday.
- 2. This will change to the Holiday Details
- click the + icon next to it to enter your holiday



If the holiday is just one day, make sure that you **tick End of Day**.



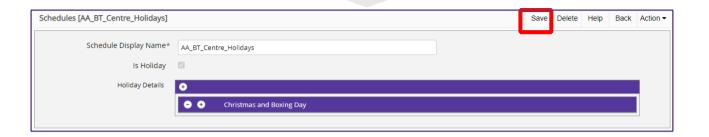
To add further holidays, click the plus '+' on the first created schedule to add more.

Also if you wish to remove a holiday click the minus to remove '-'



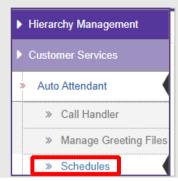
Christmas and Boxing Day

Once completed click the 'Save' icon on the right-hand side



Create Open Hours Schedule and Amend

Select Schedules and Select Add





Create a **Schedule Display Name**, this can be the same name as Auto Attendant, unless the schedule created will be shared to other sites.

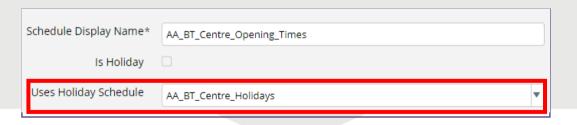


For the Scheduled Display Name.

Be sure to follow the naming convention

AA_. As mentioned in the introductory slide.

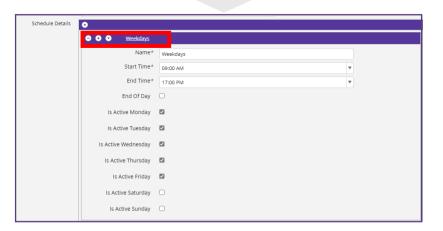
Note the **Uses Holiday Schedule** will correspond to the previously created holiday schedule that you have created for the organisation and will link to the opening hours.

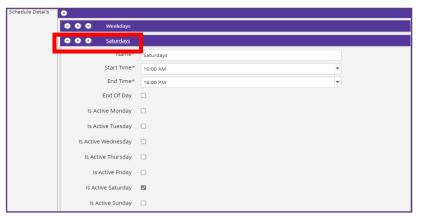


Once you have created the **Schedule Display Name** and chosen the corresponding **Uses Holiday Schedule**.

Click the '+' icon next to the **Schedule Details** to create the opening schedule/s.

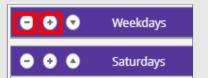
For best practice it would be advised to create a **Weekdays** schedule and a **Weekend** schedule.



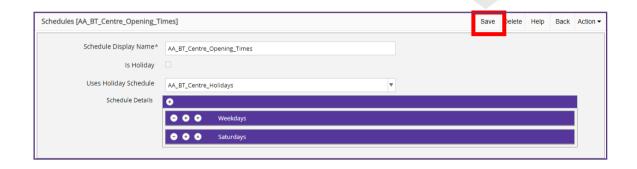


To add further **Schedules**, click the plus '+' on the first created schedule to add more.

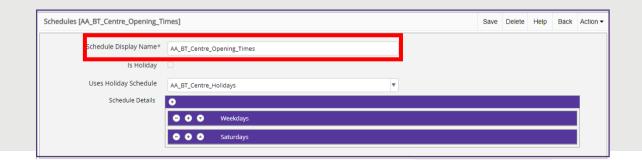
Also if you wish to remove a **Schedule** click the minus to remove '-'

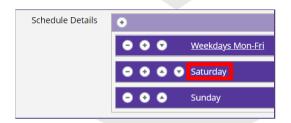


Once completed click the 'Save' icon on the right-hand side



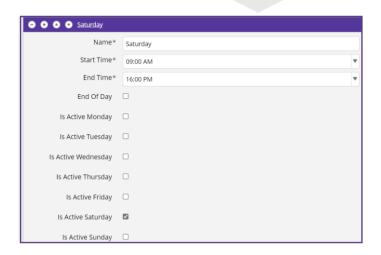
To amend/change an existing **Schedule.** Find the schedule you wish to change





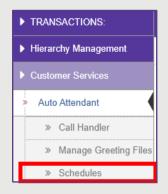
Change accordingly.

Once completed click the **'Save'** icon on the right-hand side



Remove Created Schedule/s

To remove a schedule, go to **Schedules**. If there are a number of **Schedules** created, use the **'Search'** feature to find the **schedule**. Or if only a small list then scroll to find the one you wish to remove.





If there are a number of **Schedules** created in the then use the 'Search' feature to find the **schedule**. Or if only a small list, then scroll to find the one you wish to remove.

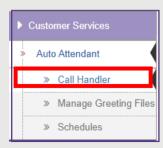
Once found click the **tick** next to the one you wish to delete, then click the **Delete** button on the right-hand side of the screen.





Call Handler/s

Click on your created **Call Hander**, you wish to configure. Below are the options that are available in the created **Call Handler** tabs.



Once in the **Call Handler** you will see the following tabs below available. Below is a brief description, however click on each tab name to go to the relevant section:

- <u>Call Handler Basics</u>: Shows Pilot, Time Zone, Schedule, Phone System, Language, Partition Name and Call Handler Owner
- Transfer Rules. Enable or disable the required transfer rules. Note that the Standard transfer rule can not be disabled.
- Caller Input. Edit the caller input, to configure user key input on keypad.
- Greetings. What the user will hear from keypad press.
- Record/Playback. configure the greeting that you want to record and playback on the chosen extension
- Upload Greeting. choose the greeting file (.wav) to upload to the call handler



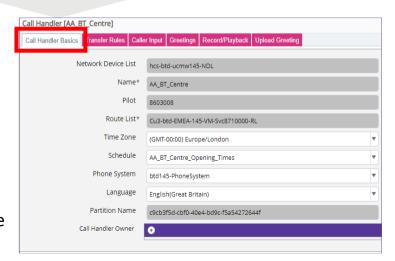
Call Handler/s

Click on your created **Call Hander**, you wish to configure.

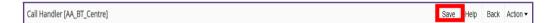


Once in the Call Handler you can do the following in the Call Handler Basics tab:

- **Time zone**. Change the Time Zone the Handler is operating in. use the drop-down option to change if required.
- Schedule. This will be the one created for the handler.
- Phone System. This will be the default switch/phone system to use for the transfers.
- Language. This can be changed to the Windows Locale ID (LICID) which identifies the language that the Cisco Unity Connection plays the handler system prompts.
- Call Handler Owner. This is the alias of the Cisco Unity Connection User to associate to the owner list of this Call Handler if applicable. Click the '+' icon to type/search for the name.

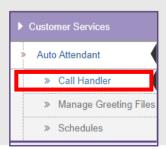


If any changes have been made, be sure to 'click' Save on the right-hand side of the screen.



Greetings

Click on your created Call Hander, you wish to configure. Select Greeting



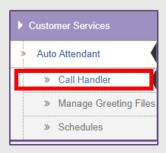
This section defines what your organisation would want in the specific greetings on the Auto Attendant.

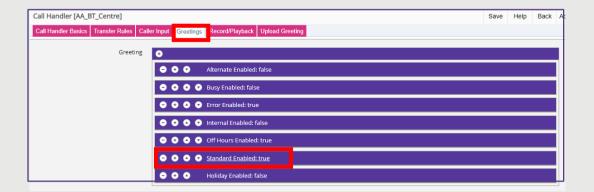
- Standard Enabled. Greeting which will correspond to the open hours to be configured.
- Off Hours Enabled. Greeting which will correspond to the closed hours to be configured.
- Alternative Enabled. Greeting which will correspond to the Alternative or emergency.



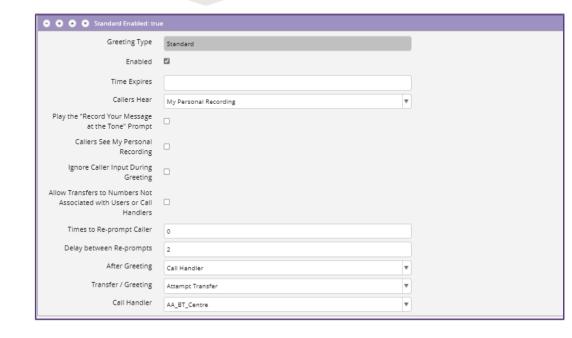
Greetings Standard Hours

Click on your created Call Hander, you wish to configure. Select Greetings and Standard Enabled





- **Enabled.** This must be ticked to turn the feature on.
- Callers Hear. This will be My Personal Recording which is the organisation's set welcome message, and caller inputs. Or can be System Default or Nothing. If set to My Personal Recording make sure 'Play the Record your Message at the Tone is unticked.
- Delay between Re-prompt Caller. This is default set at two seconds.
- After Greeting. How the call should be handled by the system.
- Transfer/ Greeting. Attempt Transfer to transfer the call. Or Greeting.
- **Call Handler**. This Is the specific Handler it will go to for in hours.



Greetings Standard Hours

Be sure to follow the example below for a **Basic** standard hours greeting

Caller Hear. This would be 'My Personal Recording'. The greeting you have made.

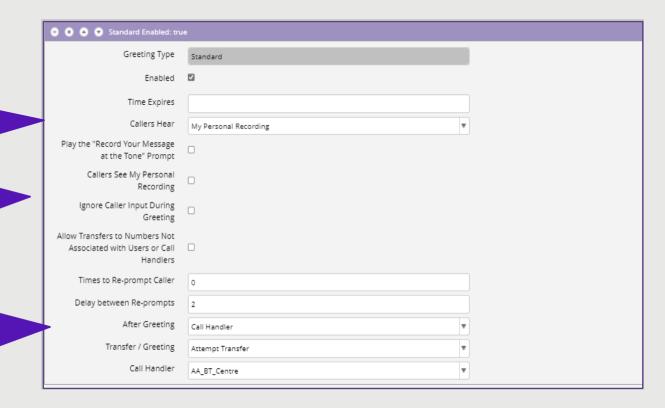
Make sure any tick boxes are unchecked.

In this example we will transfer to a destination phone number.

The next slide **Transfer Rules** demonstrates the how to setup

the destination phone number it will transfer to.

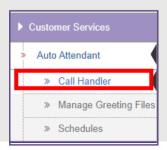
- After Greeting. This will go to the 'Call Handler'.
- Transfer/ Greeting. This should be set to 'Attempt Transfer'. Set if user does NOT input any key presses and goes to another Extension. The Extension is set in the Transfer Rules tab on the call Handler under Standard. See Transfer Rule section in the guide.
- Call Handler. This should be set to your Main Call Handler.



Once configured click the **Save** icon on the right-hand side OR if you need to create another greeting then go to the next one then **save**.

Transfer Rules

Click on your created Call Hander, then Select Transfer Rules

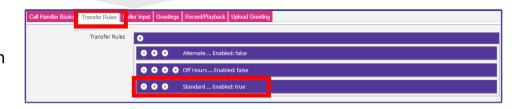


Once in the **Transfer Rules** tab, transfer rules are setup on the system by default. These three below are fixed (i.e., may not add/delete rules) but can be enabled or disabled. Note that the **'Standard Enabled'** transfer rule cannot be disabled. **Best practise is to use the 'Standard Enabled'** option and not **'Alternative'** or **'Off Hours'** for basic setup.

Standard. Make sure the feature 'tick' is enabled to apply the rules. For the 'Transfer Call To' option. This can be either a standard 'Greeting' or to an 'Extension or URI' in the drop-down. For example using a Huntgroup using the 'Transfer Call To' an 'Extension or URI'.



Once completed click the **'Save'** icon on the right-hand side



For the 'Transfer Type' you can 'Release to Switch' or 'Supervise Transfer'.

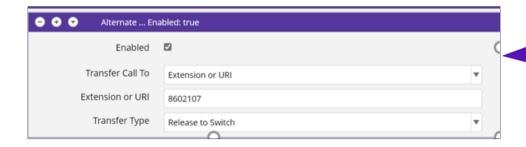
'Release to Switch' will send the call straight to the Hunt pilot number.

'Supervise Transfer', the system will say an automated message, until it is picked up.

Transfer Rules

If there is a requirement for emergency or alternative this can be set to overrule the **Standard** rules as a temporary measure. But be sure once the alternative or emergency has cleared untick the **Alternative** option and **save** to revert back to normal setup.





Once completed click the 'Save' icon on the right-hand side

For the 'Transfer Type' you can 'Release to Switch' or 'Supervise Transfer'.

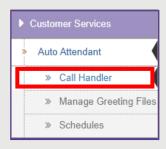
Enter the **Extension** to divert OR go to chose **Greeting.** In the example it is going to an alternative extension.

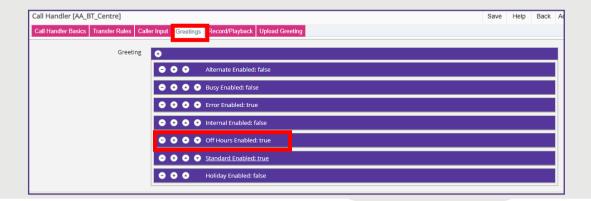
'Release to Switch' will send the call straight to the Hunt pilot number.

'Supervise Transfer', the system will say an automated message, until it is picked up.

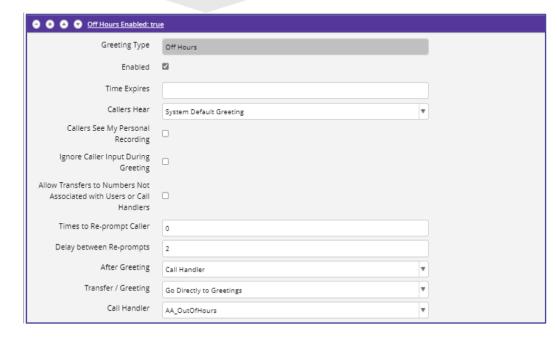
Greetings Off Hours Greeting

Click on your created Call Hander, you wish to configure. Select Greetings and Off Hours Enabled





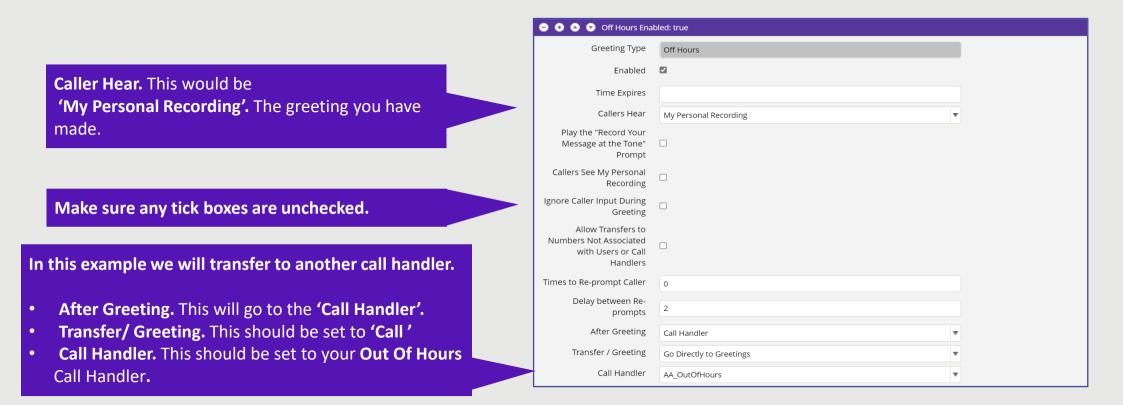
- **Enabled**. This must be ticked to turn the feature on.
- Callers Hear. This will be My Personal Recording which is the organisation's set welcome message, and caller inputs. Or can be System Default or Nothing.
- Delay between Re-prompt Caller. This is default set at two seconds.
- After Greeting. How the call should be handled by the system.
- Transfer/ Greeting. Attempt Transfer to transfer the call. Or Greeting.
- Call Handler. This is the specific Handler it will go to for out of hours.



Once configured click the **Save** icon on the right-hand side OR if you need to create another greeting then go to the next one then **save**.

Greetings Off Hours Greeting

Be sure to follow the example below for a Basic off hours greeting that transfers off to another Call Handler.



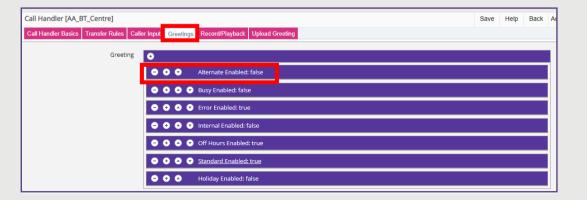
Once configured click the **Save** icon on the right-hand side OR if you need to create another greeting then go to the next one then **save**.

Alternative Greeting/Emergency

To create an alternative or emergency greeting.

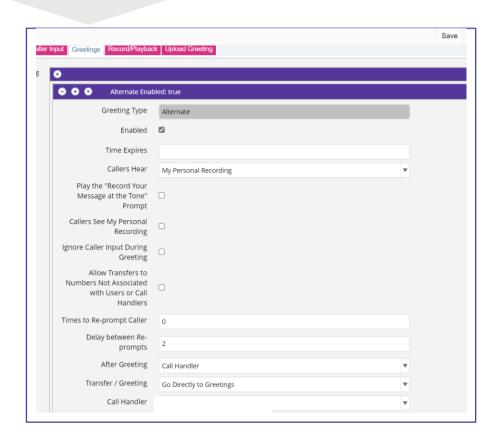
Click on your created Call Hander, you wish to configure. Select Greetings and Alternative Enabled





- Enabled. This must be ticked to turn the feature on.
- Callers Hear. This will be My Personal Recording which is the organisation's set Emergency message, and caller inputs. Or can be System Default or Nothing. If set to My Personal Recording make sure 'Play the Record your Message at the Tone is unticked.
- Delay between Re-prompt Caller. This is default set at two seconds.
- After Greeting. How the call should be handled by the system.
- Transfer/ Greeting. Attempt Transfer to transfer the call. Or Greeting.
- Call Handler. This is the specific Handler it will go to for Emergency.

Once configured click the **Save** icon on the right-hand side.



Alternative Greeting/Emergency

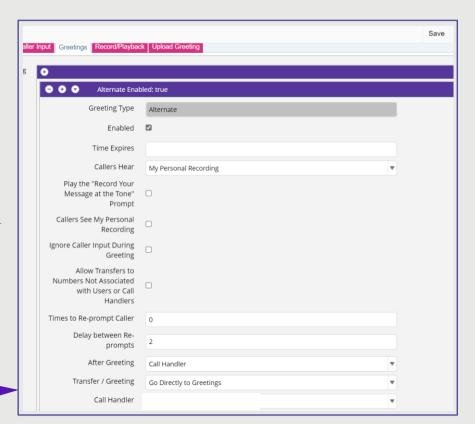
Be sure to follow the example below for a **Basic** alternative greeting that transfers off to another Call Handler.

Caller Hear. This would be 'My Personal Recording'. The greeting you have made.

Make sure any tick boxes are unchecked.

In this example we will transfer to another call handler.

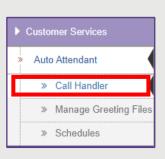
- After Greeting. This will go to the 'Call Handler'.
- Transfer/ Greeting. This should be set to 'Call'
- Call Handler. This should be set to your Emergency or Alternative Call Handler.

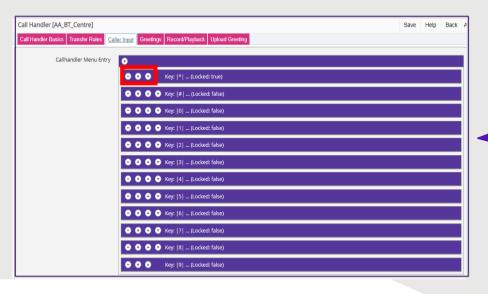


Once configured click the **Save** icon on the right-hand side.

Caller Input

Click on your created Call Hander, you wish to configure. Select Caller input





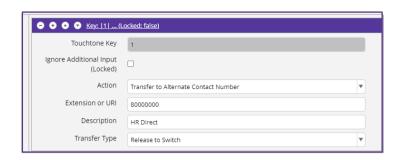
The caller input section defines what button the user has to press to get to a particular department or person.

This will correspond to the 'Greeting' that has been recorded/uploaded to the system. The configurable keys go from *, #, to 0-9.

Enter each 'key' to configure which you can do the following:

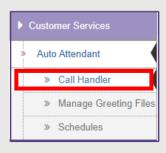
- Touchtone Key. The configurable key that has been chosen
- Ignore Additional Input (locked). unticked user to interface with the key press for input. If it is 'ticked' then the input subsequent from the user will be ignored.
- Action. This will determine what the key press will do. For example, 'Transfer to Alternate Contact Number' this will send the caller to a particular number or Huntgroup.
- Extension or URI. This will be the number the call will be sent to.
- **Description.** This is the description of what the **Touchtone Key** does for this option.
- Transfer Type. Release to Switch or Supervised Transfer.

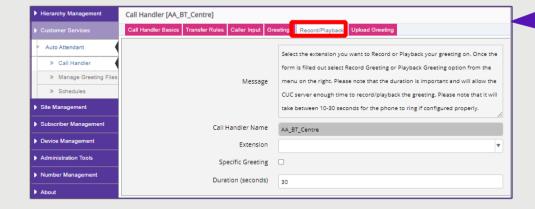
Once you have completed the above and any other relevant keys. Click the **Save** icon on the right-hand side of the screen.



Record and Playback

Click on your created Call Hander, you wish to configure. Select Record/Playback



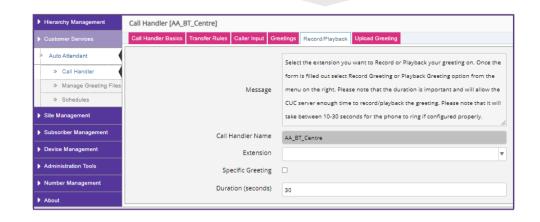


From the **Record/Playback** tab, configure the greeting that you want to record and playback on the chosen extension.

This interface allows administrators to trigger a call to a physical device, which allows for recording or playback of a greeting. The extension to dial must be an accessible extension for the administrator (or user) to answer and record or listen to greetings.

For detailed step-by-step. Hover your mouse over the 'Message' box in the centre to view how to.

- **Extension**. Select an extension from the **drop-down**, or **manually** type in the number of the device you want to call to **record** or **listen** to a greeting.
- Specific Greeting. Tick box if you want to record, playback a greeting for Standard, or Busy, etc. Otherwise, the action will apply to the main Call Handler.
- Duration. Is the time (in seconds), that the system will allow to record a greeting, and does not apply when playing back a recording. This is an important timer, as setting this too low, might result in incorrect configuration.

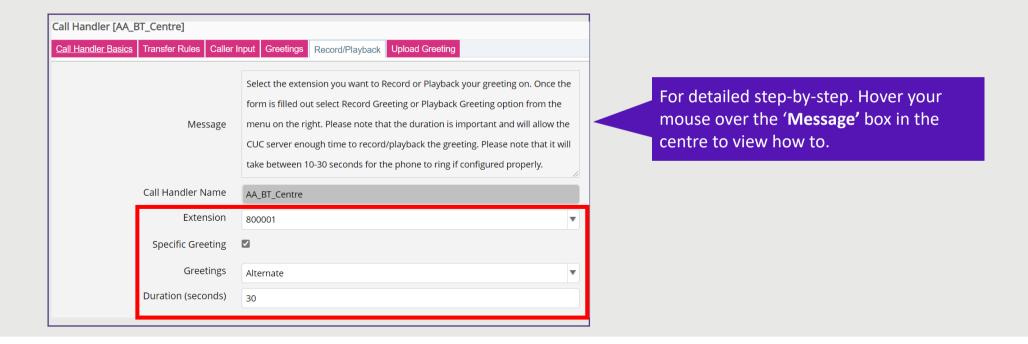


NOTE. Do not click Save on this form, go to Action > Record Greeting or Action > Playback Greeting to Save these settings.

Record and Playback

If there is a requirement to create an emergency or alternative greeting from a particular extension, go to the **Call Handler** Choose the **Extension** to record the message. Make sure that the **Specific Greeting** is ticked, from the drop down box on **Greetings** choose **Alternative**

This will then call the extension and record the message. **Please note** this will override any recorded standard greeting. Be sure that any **Alternative** options on the Auto Attendant is **unticked** when the alternative or emergency is cleared.

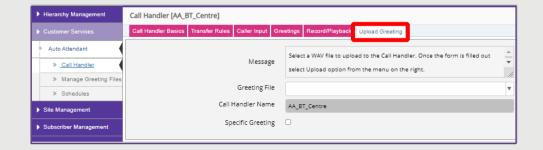


NOTE. Do not click Save on this form, go to Action > Record Greeting or Action > Playback Greeting to Save these settings.

Upload Greeting

Click on your created Call Hander, you wish to configure. Select Upload Greeting

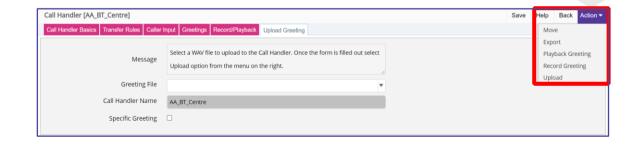




On the **Upload Greeting** tab, from the **Greeting File** drop-down, choose the greeting file (.wav) to upload to the **call handler**.

Click **Actions** Upload on the right-hand side and save.

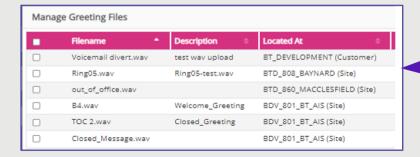
Then configure the specific greeting (if required), see next section Manage Greeting Files.



Manage Greeting Files

Click on Manage Greeting File, to see a list of files uploaded.





This section is where you have all the organisational files for the greetings that have been created and uploaded.

Please note the format of the .wav file must be 8000hz U-Law. Also ensure the audio file is at the same hierarchy as the auto attendant.

To add a file, go to **Add** on the right-

hand side

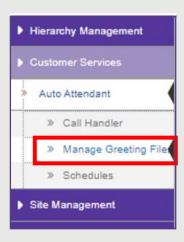


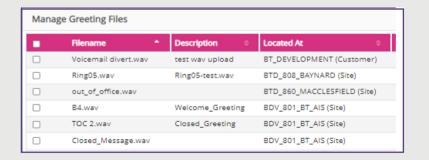
Find the file located on your machine by clicking **Browse** then **Open** then provide a **Description** then **Save.**

Manage Greeting Files		
Filename*		
	Browse	
Description		

Delete Greeting Files

Click on Manage Greeting File, to see a list of files uploaded and pick the one/s to delete.





You can also delete a file by selecting the file by **ticking** the file you wish to delete and click **Delete** on the right-hand side.

