

# ORIA

RELEASE 5.3

CUSTOMER ADMINISTRATOR GUIDE



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### **Oria Customer Administrator Guide**

Release 5.3

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## COMPANY

Configure basic settings before creating users, groups, call flows, and auto attendants. Some company settings are prerequisites, for example, you need to set up a general mailbox if you want to create workflows that allow users to leave messages.

If your Service Provider has Billing Change Notification enabled, a billing change notification and confirmation message will appear when you perform any of these actions:

- Create a new User, Group, Auto Attendant (main and secondary), Call Flow, and General Mailbox.
- Change a user bundle.
- Create a new menu item in a main or secondary Auto Attendant.

**Note:** Some features described in the following sections may not be available with your configuration.

The screenshot shows the 'COMPANY' settings page with tabs for 'Welcome', 'Business Hours', and 'Advanced'. The 'Advanced' dropdown menu is open, showing options: 'Phone Key Templates', 'Call Reroutings', 'Speed Dials', 'General Mailbox', 'Music On Hold', and 'ACD Paths'. Below the screenshot is a sequence of seven steps: 'Set Up Business Hours', 'Create Phone Key Templates', 'Set Up Call Rerouting', 'Program Speed Dials', 'Set Up a General Mailbox', 'Set Up Music on Hold', and 'Create ACD Paths'.

## CREATE ACD PATHS

An Automatic Call Distribution (ACD) path guides incoming calls through an ACD system by specifying the resources used, the order in which they are encountered, and the timing of the steps.

### *To create ACD paths*

1. Click **Company**.
2. Click **Advanced** → **ACD Paths**.

3. Click **Add New**.
4. In **Profile**, enter a name and description for the path and click **Next**.
5. In **Programming**, select the detail for the path and click **Next**.
6. In **Skill Groups**, select your primary and overflow groups.

## SET UP BUSINESS HOURS (NOT AVAILABLE IN ALL CONFIGURATIONS)

Set the hours when your business is open and closed. For example, use the Day setting for the hours that your business is open during the day and the Night setting for the hours that your business is closed at night. If required, use the Alternate setting for any alternate business hours such as during holidays. You will later set how incoming calls are handled based on the time of day.

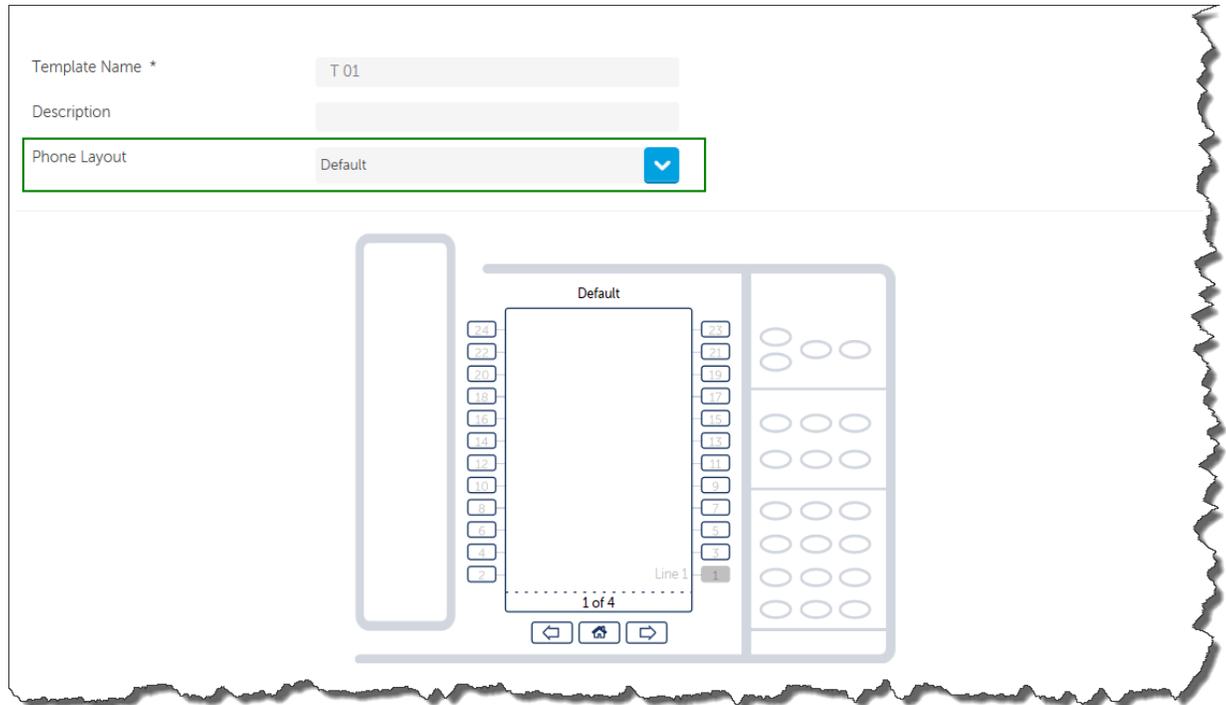
### *To set up business hours*

1. Click **Company** → **Business Hours**.
2. Select a location from the drop-down list.
3. Select **Apply to all locations** check-box to set the same hours across all company locations.
4. Select the business hours.
5. Select the hour type and click **Save**.
6. (optional) Click **Alternate** to display alternate hours on the calendar.
7. Click **Save**.

## PHONE KEY TEMPLATES

Create phone key templates for the phones your company issues. When you add a new user you will be able to select the key template instead of programming the phone keys each time. The default layout includes all (96) programmable phone keys.

The Phone Layout setting allows you to view the layout and program phone keys for specific phone types. This does not mean that you can only apply the layout to that phone type. You can apply the layout to any phone type.



Template Name \* T 01

Description

Phone Layout Default

Default

Line 1

1 of 4

### *To create phone key templates*

1. Click **Company**.
2. Click **Advanced** → **Phone Key Templates**.
3. Click **Add New**.
4. Enter a name in the **Template Name** field.
5. (Optional) Enter a brief description of the template in the **Description** field.
6. (Optional) Select a phone layout in the **Phone Layout** drop-down list.
7. Set up the key functions as follows:
  - a. Click the key, select the appropriate function from the **Function** drop-down list, and enter a name for the label.
  - b. Click **OK**.
8. Click **Save**.

## SET UP CALL REROUTING

Redirect incoming calls to an alternate number or extension. For example, a receptionist might reroute incoming calls to another extension during the lunch hour.

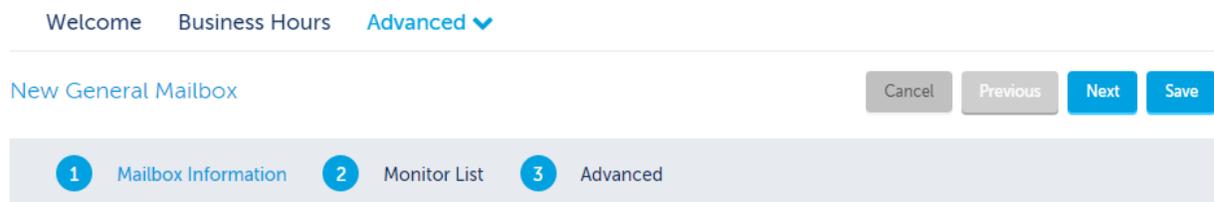
### *To reroute calls*

1. Click **Company**.

2. Click **Advanced** → **Call Rerouting**.
3. Enter a name and number for the call reroute.
4. Click **Save**.

## SET UP A GENERAL MAILBOX (NOT AVAILABLE IN ALL CONFIGURATIONS)

Set up a general mailbox for a specific purpose, for example directing calls to voicemail at night. You can assign employees to monitor the mailbox and they will see their phone message indicator flash.



### *To set up a general mailbox*

1. Click **Company**.
2. Click **Advanced** → **General Mailbox**.
3. Click **Add New**.

#### **Mailbox Information**

4. Enter the required information for the mailbox:

**Note:** A user will get locked out after 3 attempts to access a mailbox with the incorrect passcode and will need to wait three minutes before it is unlocked.

- a. Name, number, site, and passcode for the mailbox.
- b. (optional) Enable **Send voicemail to email** and enter the email address to receive voicemail.
- c. Upload your voicemail greeting.

#### **Monitor List**

5. Add the employees who will monitor the messages.

#### **Advanced**

6. Select voicemail settings for the following items:
  - a. Select settings for voicemail.
  - b. (optional) Select **Enable Embedded UM** if you want to have voicemail sent to an email address. Enter email credentials.

## SET UP MUSIC ON HOLD

Provides callers with music or information while they are waiting for a call to be completed. Prerecorded music or information that you upload plays when a caller is on Hold or transferred to a busy or ringing line.

### *To set up Music on Hold*

1. Click **Company**.
2. Click **Advanced** → **Music on Hold**.
3. Select the site.
4. Select **Embedded** as the music source.
5. To add music, select **Upload**, find the music and click the file to upload.
6. Click **Music on Hold** to enable.

## SET UP SPEED DIALS

You can use speed dial to quickly dial phone numbers.

### *To set up speed dials*

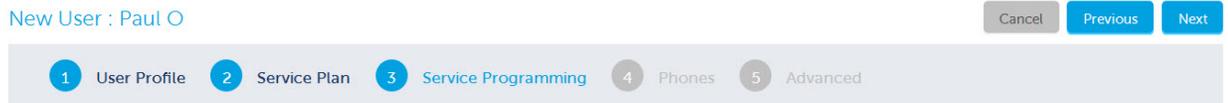
1. Click **Company**.
2. Click **Advanced** → **Speed Dials**.
3. Click **Add New**.
4. Enter a name for the speed dial, speed dial number, and the phone number.
5. Click **Save**.

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# USERS

From the **Users** view you can add, modify and delete users from the system.

Add Users by following a series of steps highlighted in the task menu bar. The following image shows that the Administrator is at step 3 of the Add New task.



## *To add a user*

1. Click **Users** and then click **Add New**.

### **User Profile**

2. Enter the User details. Fields marked with an asterisk (\*) are required. Enter a minimum of 4 characters for the Username.
3. Click **Next**.

### **Service Plan**

4. Click **Select** to choose a phone plan for the User. The chosen plan will be highlighted and **Selected** will display.
5. Click **Next**.

### **Service Programming**

6. Select the service details for the User. Fields marked with an asterisk (\*) are required.

**Note:** When you create an ACD Hotdesk user with a softphone, a shared device is automatically created for the user.

**Note:** If you select a basic plan that does not include voicemail, you can still forward calls to voicemail (Call Handling Rules) however the calls will go to your corporate voicemail.

7. Click **Next**.

### **Phones**

8. From the **Phone Type** drop-down list, select the type of phone for this User.
9. From the **Emergency Response Location** drop-down list, select the location to which emergency call will be sent.
10. (Optional): From the **Select a predefined key template to be applied to this phone** drop-down list, choose a key template for the primary phone. Phone key templates apply to the primary phone only.
11. (Optional): Enter the **MAC Address** of the phone.

12. Click **Next**.

### **Phone Keys**(optional)

When you choose a MiNet phone type, a step is added to allow you to program the phone keys. You can also edit the Prime phone key and specify the Ring type on all phones that allow key programming.

13. When you select a MiNet Phone type for example the 5330e IP , you can program the phone keys as follows:
  - a. Click a key on the phone diagram.
  - b. Select what should happen when a phone user presses the key.
  - c. Click **OK**.
  - d. Repeat steps a to c to program other keys.
  - e. Click **Save**.

### **Advanced**

14. Select the call handling rules.
15. Click **Save**.

### ***To modify a user***

1. Click **Users** and then click a user's name.
2. Select the details that you want to modify from the task menu bar, for example **Phones**.
3. Make the changes and then click **Save**.

### ***To delete a user***

1. Click **Users**.
2. Click the check box for the User you want to delete.
3. Click **Delete**.

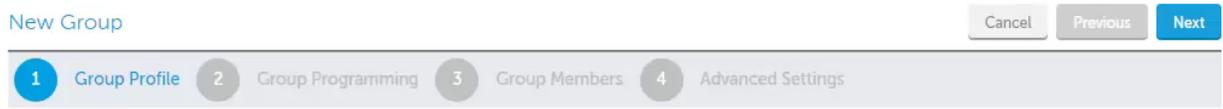
## GROUPS

Groups are typically company departments such as Support, Sales, Marketing. Organize staff into groups so that there is one number to reach members of the group. For example, you could have a sales team and group their phones together under one directory number.

From the **Groups** view you can add and modify groups to the system, and also delete them from the system.

## ADD A GROUP

Add Groups by following a series of steps highlighted in the task menu bar. The following image shows that the Administrator is at step 3 of the Add New Group task.



### To add a Group

1. Click **Groups** and then click **Add New**.

#### Group Profile:

2. Enter a unique name for the group and select the group type. Fields marked with an asterisk (\*) are required.
3. Click **Next**.

#### Group Programming:

4. Select the location, number(s), and extension for the group.
5. (optional) Click the **Enable Voicemail** check box to enable Voicemail and then enter your Voicemail passcode and email forwarding details.
6. Click **Next**.

#### Group Members:

7. Using the search box, add members to the group.

**Note:** When you start adding members to a group, you can enter any number for a member that you want. However, that number must already exist in the system, for example as a speed dial or a device created in MiVoice Business.

8. Select the ring type for the group.
9. Click **Next**.

#### Advanced Settings:

10. (optional) Select the voicemail settings:
  - a. Click **Voicemail Settings**.



3. Click **Delete**.

**See Also**

"Users" on page 10.

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## SHARED DEVICES

Shared devices are phones that are shared among multiple users in locations such as lobbies and offices. For example, a desk that is shared by office workers on different shifts with each worker having their own personal phone settings.

**Note:** When you create an ACD Hotdesk user with a softphone, a shared device is automatically created for the user.

### *To add a shared device*

1. Click **Shared Devices** and then click **Add New**.
2. Fill in the fields and click **Save**.

**Note:** The MAC address is located on the back of the phone. For example: 01-80-C2-00-00-10.

### *To change a shared device*

1. Click **Shared Devices** and click device you want to edit.
2. Edit the fields and click **Save**.

### *To remove a shared device*

1. Click **Shared Devices** and select the device.
2. Click **Delete**.

## AUTO ATTENDANTS (NOT AVAILABLE IN ALL CONFIGURATIONS)

An Auto Attendant is like a virtual receptionist. It allows you to transfer calls to an extension without the intervention of a switchboard operator or receptionist. The Auto Attendant wizard allows you to set up a voice-guided menu structure that provides callers with self-service access to departments or individuals they are trying to reach.

Example Auto Attendant recording:

*Thank you for calling Mitel; For Sales, press 1; For Technical Support, press 2; For other services, press 3.*

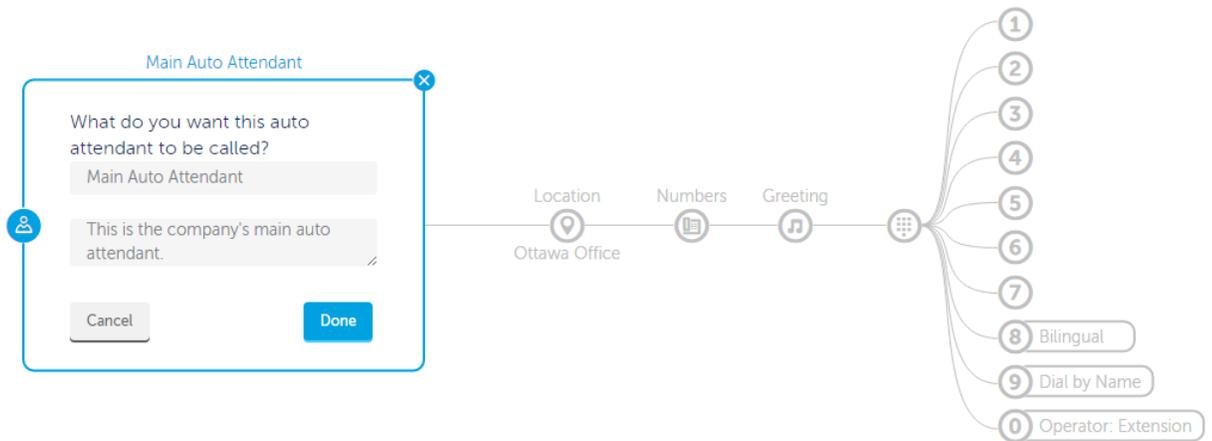
## EXTERNAL CALLS AND THE DIRECT NUMBER GATEWAY

The Direct Number Gateway is the terminating point for a telephone company's trunk lines for your Service Provider. The Direct Number Gateway routes external originating calls inward to your phone system. Your phone system then routes calls directly to the desired user extensions within your organization without having to use operators.

**Note:** If you want to record a message or name for a key, you must first create the key, select it again, and record your greeting.

### To set up an auto attendant

1. Click **Add New**.
2. Follow each step in the wizard.



3. Click **Save**.

## CALL FLOWS (NOT AVAILABLE IN ALL CONFIGURATIONS)

Call Flows allows you to set up how incoming calls to your company's main number(s) are handled, under different situations such as the time of day or the availability of resources to accept the call. You can direct calls to:

- Users
- Groups
- Auto Attendants
- A general mailbox

## CALL FLOW OPTIONS

There are three call flow options:

### DAY AND NIGHT OPTIONS

Typically calls are handled differently during the day and at night. During the day, you may direct calls to a receptionist and to voicemail after work hours (night). Both options are based on the business hours that you have set up.

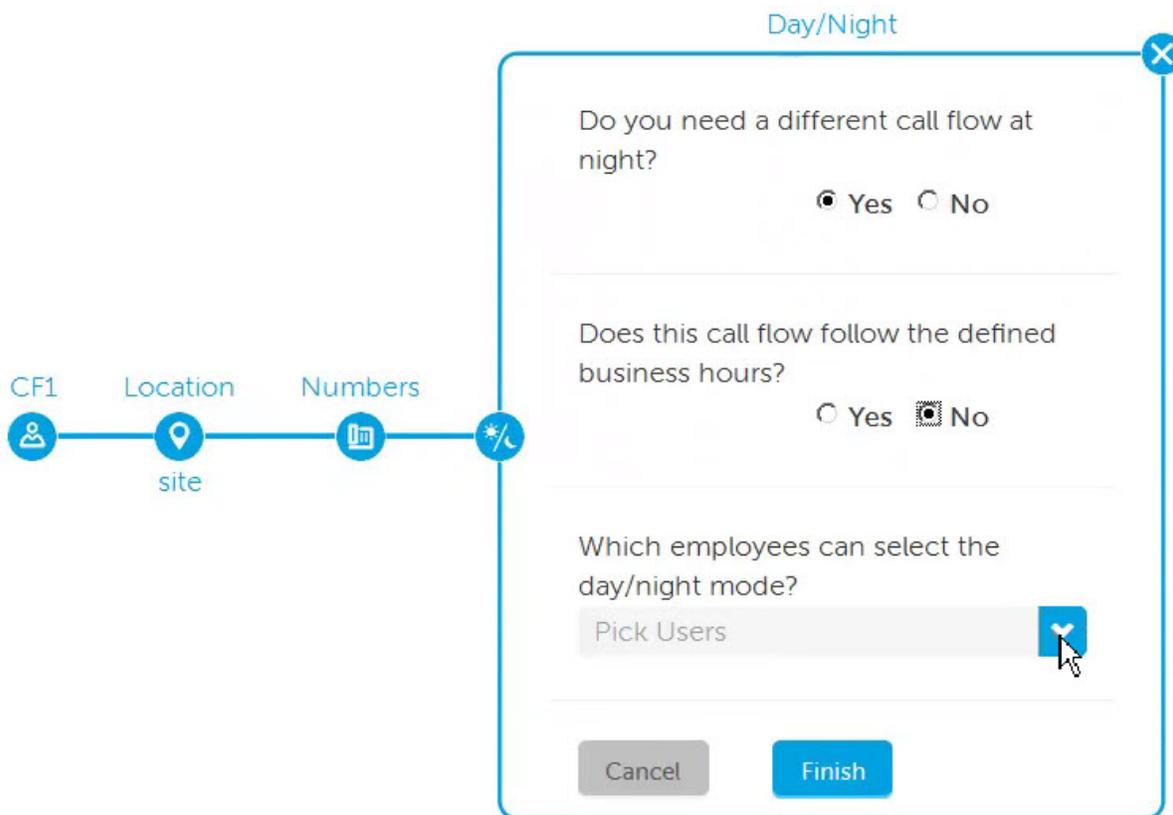
### ALTERNATE NIGHT

You can set up an alternate night call flow that is different from your company's business hours for example, a holiday schedule.

The Call Flow wizard guides you through the steps necessary to set up how you want your company to handle incoming calls.

#### To set up call flows

1. Click **Add New**.
2. Follow each step in the wizard.



3. After setting up or changing call flows, you must select which employees will have the permission to change the call flow from day to night mode.

**Note:** When Call Flow follows business hours, Oria programs the Day/Night/Alternate Night keys and employees use these keys to set the system Day/Night 1/Night 2 mode. The call is routed to the chosen destination based on the system Day/Night 1/Night 2 mode. When the Call Flow does NOT follow business hours, Oria still programs the Day/Night/Alternate Night keys and employees use these keys to set call forwarding to the chosen destination. The system Day/Night 1/Night 2 mode is not affected by using these keys.

4. Click **Save**.

## MODIFYING CALL FLOWS

You must select the business hours after changing a call flow to make it follow business hours when:

- Creating a call flow that does not follow business hours
- Modifying a call flow to become a Day or Night call flow that does not follow business hours
- Modifying the Day, Night or Alternate branches in call flows
- Users will choose the Day, Night or Alternate using a phone key. These users must be on the list of employees who have the permission to change the system from day to night



