BrightArrow ExecutiveAssistant 6.0 for the NBX – 100 Top Features

BrightArrow ExecutiveAssistant is a Windows-based application platform designed for the NBX (V3000/V5000) to enhance a company's telephone productivity and your customers' satisfaction. Using 3Com's innovative Media Port technology, the platform is easily configured for any chosen subset of features, all aimed at optimizing business communication.

Here are a hundred features offered by the software platform. The features are categorized and color-coded to clarify the level of client licensing necessary for each feature *(color table legend on last page)*. ExecutiveAssistant is very flexibility in that you can pick and choose the subset of features that you need upon initial deployment, knowing that you can add future functionality from this list as time allows.

Find Me / Follow Me and Mobility: Unparalleled flexibility to handle important callers when you are away from your desk. It finds you, saying who is calling: You decide from there.

1. Each user can have an unlimited number of *Away States* designating how (and if) to direct each call.
2. Built-in *Away State* templates include: Wireless, Home, In a meeting, Away from office, On vacation.
3. You can select current *Away State* by clicking on PC screen, or a speed-dial on NBX or remote phone.
4. When a call rings a destination phone, the software speaks the caller's name. Your options in answering the call:
   Accept by saying "Yes" or pressing 1.
   Reject by saying "No,' pressing 2, or not answering.
      Caller is sent to NBX voice mail.
   Hear name again with "Repeat" or pressing 3.
5. Can use your desktop telephone as an *Away State* to get a call-screening announcement on your telephone.
6. Can announce target user or department's name on the telephone so when one person covers calls for multiple people or departments, they know who the call is for.

Find Me / Follow Me and Mobility (continued)

7. Each *Away State* can be customized to include information about how to reach the user:
   Phone number or extension to dial.
   Message played if user not available. Example: "Jenny was not available at her desk or cell phone. You will be sent to voice mail."
   Whether the caller is screened (the caller's name would be played back to the user over their remote telephone to ask if the call is to be taken).
   Whether a PIN is required to accept call (useful in the case of a shared telephone such as a home phone).
   Additional Away State to try if user is not available at this Away State (particularly useful if multiple phone numbers are to be tried for a dept or user).
8. Away States without phone numbers are used to tell the caller why you are not available. Example: "Joe is in a meeting and will be returning calls when the meeting is over. You will be sent to voice mail."
9. Find-me/follow-me can be configured to create Camp-on functionality with opt-outs and linkage to remote find-me/follow-me.
10. Find-me/Follow-me can be set such that high-priority callers are forwarded to the user, others to voice mail.
11. *Presence* is easily accomplished at any workstation – calls for you can be announced at any location (such as a colleague's office or conference room) simply by checking yourself as present there.
12. *Away States* can be used for hot-desking (or hoteling), as users "log in" at alternate telephones.

Real-time Call Log: Allows you to keep track of all the calls in your company by several different functions, and export the data to Microsoft Excel for reporting purposes
   On your desktop, ExecutiveAssistant displays calls placed and/or received for selected number of days.

13. You may sort or filter the items in the Call Log.
14. The Call Log displays extension-to-extension calls in addition to external incoming and outgoing calls. Double-click any entry to dial number immediately.
15. Call Logs can be sorted by date/time, extension number, Caller ID, dialed number, duration, incoming/outgoing and name from database.
16. Any selection in the Call Log can be exported as a comma-delimited file to produce reports in Excel.
17. Automatic export available for automated reporting.
18. Supervisor Clients may display all allowed employee entries in their Call Log up to the minute.
19. Supervisors can play back any associated recording, or export the WAV file for e-mailing or saving.
20. Call Log information can be automatically exported into special formats, or available via ODBC, for special uses.
21. Call Log flexibility has been adapted for various specialty purposes, such as Employee Time Clocks. Contact BrightArrow for options on special uses.

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Call Announce and Select: Setting priority level per contact, choose who can reach you, with optional PC display/announce of calling party, even if there's no Caller ID match.

22. Can ask caller to speak name for playback to user and for speech recognition lookup in contact data for call routing.

23. Contact's priority differentiates callers announced from those sent to voice mail; level changed from user-interface.

24. Linked with Outlook or Exchange (contact BrightArrow for other database options). Synchronization used for:
    * Smart call routing
    * Intelligent call filtering (by spoken name / Caller ID)
    * Speech Dialing
    * Screen pops

25. Can designate callers who know your DID and/or extension to automatically bypass call screening.

26. You can have it automatically schedule different screening levels based on time of day or day of week.

27. If call passes screening, the caller (name, Caller ID, etc.) can display on your PC for your decision.

28. You see calls on your PC -- and optionally hear them on your PC's speakers -- even when you are on the phone, to always know who is calling.

29. Can automatically display contact screen of any non-TAPI program by Caller ID that is invoked via command line or web interface.

30. Call Status window shows details of call, including link to contact and duration, even after the call has completed.

Known Incoming Call for Randy Slavrocovich

A known call has been received at 08:47 AM   Expires: 00:10

| Royce Hazelwood | Contact Info | Listen To Caller |

CallerID Number   CallerID Name   DID

| 4258904182 | Trunk | 4259526492 |

| Answer Call | Take Message | Help |

Call Recording / Monitoring / Whisper / Barge-in.

Uses 3Com Media Drivers to deliver a vast array of unparalleled features.

31. Calls to and from any type of phone supported for recording, monitor, whisper, barge-in, including analog calls, conference calls, VTL calls, extension-to-extension and even calls to remote numbers.

32. Always or on-demand recording selectable per user.

33. On-demand calls buffer until you press ** on your phone at any time during the call. The other party hears no touch-tone yet the entire call is retroactively saved.

34. Press *0 to start recording from now or from beginning.

35. Press *P (*7) to pause and *U (*8) to un-pause recordings to control what is being recorded.

36. Optional beep-tone for legal compliance (especially important for outbound call centers).

37. If a remote cell-phone call is on-demand, you can even press ** on that phone to save the conversation.

Call Recording / Monitoring / Whisper / Barge-in (continued)

38. Separates each employee's calls into their own subdirectory for direct access by the employee.

39. Software preserves the NBX's audio encryption, protecting calls from snooping or spy ware.

40. Administrator-defined purge and archive options.

41. Can be used to archive calls sent to voice mail.

42. Used in conjunction with 3Com ACD or ExecutiveAssistant ICD functionality for call center with recording, monitor, whisper, barge-in.

43. Tight integration with 3Com eXchange Call Center and EPIC Center for call recording/monitoring as well as speech recognition front-end.

44. Recording, Monitor, Whisper, Barge-in features uni-cast for usage across connections not supporting multicast.

45. Sentry App runs on a separate (shared) PC to ensure calls get routed at all times (no single point for failure).

46. Supervisors with permissions can silently listen in on one employee, and switch over to another employee.

47. Monitor includes single-click way to Whisper, allowing supervisor to speak to an employee without the outside party hearing: Great for coaching/training.

48. Monitor offers single-click Barge-in to proactively join selected conversation.

49. Current call status of all (allowed) employees can be viewed from a single window (for use by receptionists and managers).

50. First call recipient can even hang-up a barged-in call for supervisor to continue speaking to outside party.

51. Many employees can monitor/whisper/barge into a call, allowing many to join in a conference call.

52. Automatic monitoring to proactively call a supervisor if certain employees places or receives a call.

53. PC Windows commands for Record from start, Record from now, Record Pause, Record Un-pause

IVR – Interactive Voice Response

54. Customization options for automatic database lookup and read-back.

55. Automatic dynamic forced matter code lookups from ODBC-accessed database (Legal Module).

56. Can read back automatic created data based on user input, such as store lookups based on zip code.

57. Can query and save answers via DTMF or spoken input for various IVR functions.

Programming Interface

58. ActiveX control for automatic dialing from Web or program interface (including thin clients) without need for TAPI.

59. ActiveX control to identify name and location of destination recording for software-controlled storing of recordings.

60. ActiveX control interface to identify whether a call is to be recorded, including the ability to record from beginning, record from now and pause record.

61. Can be configured for automatic out-dialing to distribute voice messages to live recipients and/or their voice mails.

62. Auto-dialing option to allow automated call recipient to choose to talk to a live person.

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Speech Recognition Auto-Attendant: Powerful and friendly call routing based on spoken names.

63. Unlimited levels and entry-points.
64. Easy setup, recording prompts from NBX telephone, microphone or imported WAV files.
65. Multi-tenant/multi-company. Departments or even different companies may have their own auto-attendant, with dept-specific extension list and 0.
66. Multi-lingual. Initial menu choice (or DIDs) directs caller to select language; sub-menus in that language.
67. Unlimited number of people/depts in name directory.
68. Callers can use touch-tone instead of saying names (or both).
69. Use NBX timed routing (NBX 4.2+) for after-hours menus.
70. Unlimited synonyms/pronunciations per person and dept.
71. Can co-exist with NBX auto attendant. For example, speech recognition can result from "Press 9 for Name Lookup" so callers can say name and not spell it out.
72. May create departments or info entries without matching phones (for IVR or remote forwarding).
73. Option of full-duplex (barge-in) vs. half-duplex modes
74. If multiple people or departments match a spoken name, those alternatives are read for caller to choose.
75. Can be utilized as a true extension-to-extension Intercom.
76. Support for any SAPI5 Text-to-speech engine, such as Cepstral.com.

Speech Dialer: Say the name of the person in your contact database, and it dials at your desk or cell phone.

77. Faster and easier than PC or PDA searches.
78. Can be used inside or outside of the office.
79. Sync with Outlook/Exchange.
80. If multiple names closely match, reads back list and allows selection of correct name.
81. Single speed-dial on NBX telephone, or cell phone.
82. All long distance is routed through your office.
83. Class-of-service (COS) restrictions and required PIN protects against unauthorized long-distance usage.

Zone Paging: Unlimited zones to page selected users.

84. You can define an unlimited number of zones to page to anyone in the company who has NBX phones.
85. Page occurs right after speaking message to transmit.
86. Anyone can initiate a page from their telephones.
87. Can page in uni-cast environments, to physical paging devices, and to NBX paging features of other NBX's over VTL.

Customized Audio-on-hold (MOH): Each individual can play a message or audio of their choice to callers when On Hold.

88. You can have a company/department messages, music or a mixture of both.
89. With the Advanced Client or Supervisor Client, each user can easily change their customized music/audio.

Call Queuing / Smart Call Routing: Extends the call announcement to departments so that you have call center functionality at a great price.

Call Queuing / Smart Call Routing (continued)

90. Each employee can be checked in to any number of departments. When a call comes in, all employees in that department see a screen pop of the incoming call.
91. Calls automatically queued until employee takes call.
92. Flexible Call Queue List window allows employees to select appropriate calls while viewing Caller ID, database match (if any), times (time called, waited, and count-down to coverage), user/dept requested and DID dialed.
93. Supervisors can view Call Queue List window and choose calls themselves as necessary.
94. When one employee accepts the call, the screen pop disappears from the other employees' PC screens.
95. Each dept and/or user can record a *comfort message* such as: "All representatives are on the phone. Your call is important to us and will be answered in the order received; please hold or press 7 for voice mail."
96. Callers can automatically be routed to predefined departments or employees by Caller ID or DID.
97. With a single click, employees can cover calls for others to make sure important calls are not sent to voice mail.
98. Options for customized audio and task tray blinking upon new calls or calls waiting.
99. Match on DNIS (DID) or Caller ID can automatically choose department for routing, which in turn can display customized HTML instruction page for recipient.
100. Calls can route out to remote phones (like cell phones) until a person is found, essentially serving as a **Remote Hunt Group.**

Feature Licensing Legend (color of section = requirement)

- ☒ **3C10450A: ExecutiveAssistant Server License**
- ☒ **3C10452A: Basic Client or higher + Server**
- ☒ **3C10453A: Advanced Client or higher + Server**
- ☒ **3C10454A: Supervisor Client + Server**
- ☒ **Special version necessary**

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New Features and Benefits with Version 6.00

Star-One/Star-Two to turn a cell phone into a fully functional NBX extension (requires an Advanced or Supervisor license)

Calls that are routed through ExecutiveAssistant (EA) are eligible for the new Star-One feature. Specifically, if the call is either On Demand or Always Recording, and if the user has an Advanced or Supervisor client, the user is eligible to press Star-One during the call to conference or transfer using EA's conferencing technology. Once the user presses Star-One, they are prompted to enter an extension or outside number. Once they complete that, the system begins the dial from a new Media Port, and conferences the new party with the existing parties in the call.   If the party who pressed Star-One disconnects at that point, they have in essence transferred the call to the new party(s). If subsequent to the call being connected the party presses Star-Two, they will have dropped the last party that was added to the conference.

Call Recording Search, Annotation and E-mail Options (Search requires a Supervisor license; Annotation and E-mail requires an Advanced or Supervisor license)

With ExecutiveAssistant 6.00, the Call Log has been enhanced with a Find function that provides fast searches of call recordings based on phone number, extension, Caller ID name/number, recording annotation, or even partial strings of these fields. In addition, each call recording has up to three user-editable Notes fields that can be entered immediately (via a screen-pop) during the call, or edited/searched later using the Call Log.

The software includes a method to start the music-on-hold file at random start points, and to automatically compress recordings to .WMA audio format, which takes approximately 65-70KB/minute (12x smaller than .WAV format).
In addition, you can now configure the system such that recorded calls for specified users are automatically e-mailed.

Expanded Ad-hoc Conferencing (requires an Advanced or Supervisor license)

The Star-One feature can be used from an NBX telephone, or even a remote telephone to allow conference calls that go beyond the four-party limit of the NBX. To add additional parties to a conference call, you press Star-One and their number. Star-Two drops the last party added. You can add 8, 12, 16 or more people into an ad-hoc conference call

In-And-Out (requires an Advanced or Supervisor license)

- To have the recipient see the Caller ID of their company instead of their personal cell phone
- To use the long-distance or international calling plan of the company instead of their cell phone
- To be able to record the call
- To be able to use the Star-One/Star-Two feature

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Auto-Dialing (requires a configuration with at least 10 Advanced licenses)

ExecutiveAssistant 6.00 offers the ability to automatically dial from lists of phone numbers to play messages to the call recipients (or their respective voice mails).

The existing Speech Dialer functionality of EA has now been expanded to allow entry of DTMF from a remote phone to facilitate the opportunity for a user to call into the system and have that call placed out from an NBX trunk. They would use the feature to accomplish one or more of the following objectives:

By clicking on the Automatic Dialer menu, you can burst out pre-recorded messages to large lists of recipients, delivering significant cost savings, efficiency and integration that is much more practical than expensive dialing services. It is available to EA 6.00 customers who own the EA Server License (3C10450A) and at least 10 Advanced Client licenses (10 x 3C10453A).

Emergency Notification (requires a configuration with at least 10 Advanced licenses)

The *Emergency Notification* module detects when a caller presses the Emergency Phone Number value (typically 911) Upon 911, the system will start notifying a pre-defined group either by phone or by e-mail reporting the extension that dialed the Emergency Phone Number.
The following is necessary to enable the feature within ExecutiveAssistant 6.00 or later:

- The system must be equipped with 10 or more Advanced Client Licenses (Part #3C10453A)

- After adding the above licenses, the feature is reached on the server by clicking in Settings -> Emergency

Figure 1 - Emergency Notification

To use this feature, you must first enter a list of phone numbers, extensions and e-mail addresses to receive the emergency notification. Once activated, the system will monitor the extensions listed in the NBX TAPI Service Provider. If any of these extensions dial the Emergency Phone Number (911), the system will start the notify list and begin alerting the items in the list of the extension that dialed the Emergency Phone Number.