UNIVERGE® UM8000

System Administration Guide

For version 11.9 and above

NEC

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Contents

Preface

This document includes instructions for the following basic administrative tasks for the UNIVERGE®
UM8000 messaging system:

- Getting Started with the UM8000 Messaging System
- Description of the Users of the System
- Administering Subscribers
- Configuring Templates
- Managing Calls
- Configuring Hospitality Settings
- Backing up and restoring the messaging system

More in-depth instructions for all other features not covered in this guide such as configuring switch,
ports, server, scheduling, reports, etc. can be found in the **Help** provided in the Web Administration
Console (WAC). To access **Help** from the WAC, click the (?) **Help** icon in the Title Bar while viewing a
page.

Additionally, the installation media has a **/Documentation/en/PDF** folder that contains this document
and other helpful documents such as system installation guide, integration guides, user guide, etc. in the
PDF format.

> **IMPORTANT** Compliance information for third-party electronic devices is provided in the third-party
> manufacturer documentation supplied with the messaging system package.
>
> Do not use third-party manufacturer documentation to install, upgrade, or manage the
> messaging system. You should, however, refer to manufacturer documentation for
> computer hardware and peripheral equipment.

References

Included on the system installation media is a catalog of technical documentation. If you are installing any
advanced applications, such as Networking and Fax Server applications, you should refer to the
appropriate technical documentation for application and installation information.

The technical documentation is produced in the Adobe Acrobat PDF format and requires the Adobe
Acrobat Reader program to view it. You can download the program from www.adobe.com.

The documentation set for this product includes the following documents and online resources:

- **User Guide**. Available as a PDF only. Contains instructions for subscribers about accessing the
  messaging system and checking and sending messages.

- **Quick Reference Card**. Contains shortcuts and quick instructions telling subscribers how to access
  and use the messaging system.

- **Documentation Updates**. See the reseller website www.necntac.com for documentation updates.

- **Online Help**. Online help is available to provide immediate assistance while using the Web Administration Console (WAC) and Mailbox Manager. Whenever you are using the WAC or Mailbox Manager, click the **Help** icon or **Help** to see context-sensitive help for the current page.

  You must have pop-up windows enabled on your browser to access some features of the help. See your browser help for information about enabling pop-up windows.

Document Conventions

The following conventions are used in this document:

- **Key Names.** Names of keys on the keyboard are shown in a box.

  Example: `Enter`

  When two keys must be pressed simultaneously, they are joined by a + sign.

  Example: `Alt` + `Tab`

- **Reference to Document.** *Italics* fonts can also signify the titles of other documents.

  Example: Refer to *System Installation Guide*.

- **UI Element Names**. Names of UI elements such as dialog windows, screens, menu items, tabs, buttons, icons, etc. are shown in bold.

  Example: On the **Startup** screen, click the **Start** icon.

- **User Input.** Information required to be typed or spoken is shown in italics.

  Example: Type the password *voicemail*.

- **Warning, Caution, Important, and Notes**. Text for the contents that require attention are shown as follows:

  > **WARNING** A warning paragraph advises you of circumstances that can result in the loss of data, harm to the system server platform, or personal harm.

  > **CAUTION** Failure to follow these recommendations can result in unauthorized access to the system and consequent loss of data.

  > **IMPORTANT** An important paragraph gives decision-making information or informs you of the order in which tasks need to be completed.

  > **NOTE** A note gives additional information, provides an explanation, or indicates an exception to the information in the preceding text.

Glossary

Table 1. Glossary

Term	Description
Box	In the UM8000 messaging system, calls are mainly processed and managed through "boxes". There are different types of boxes that can be configured to answer, route, transfer, and record calls.
Dual‑tone multi‑frequency (DTMF)	Dual‑tone multi‑frequency is the method used by touch tone phones to identify keys that are pressed on the phone keypad. DMTF uses a specific frequencies or tones for each key so it is easily identified by a microprocessor. DTMF is used for user input and in analog integrations.
Messaging System	A system that provides the flexibility to access voice messages by phone or e-mail by managing all types of communications in one place with a universal mailbox.
Web Administration Console (WAC)	Used for the full configuration of the messaging system such as starting/stopping the system, backing up/restoring data, managing subscribers, and configuring system, hospitality, e-mail, language, switch settings, etc.
Maintenance Menu	The Maintenance Menu is a user interface that minimizes the need to type lengthy commands at the command line prompt and is used to specify network configuration settings, set the messaging system software date, time, time zone, and general tone detection.
WinSCP	A SFTP (SSH File Transfer Protocol) and SCP (Secure Copy) client for Windows that uses SSH (Secure Shell). The main function of WinSCP is to provide safe copying/transferring of files between local and remote computers in a secure environment.
PuTTY	A telnet and secure shell client for secure shell terminal access. You can use this utility to directly access the Maintenance Menu, command line interface of the messaging system.
GTDetect	Use the GTDetect utility to learn the phone system tones and configure the messaging system server to recognize these tones. It also detects voice boards and checks the status of each port on each board.
Text-to-Speech	A program that accepts strings of computer text and generates synthetic speech to read the text aloud.

Telephone User Interface (TUI)	The system of voice menus, DTMF commands, and prompts that a caller or a subscriber hears while interacting with the messaging system over the telephone.
ViewMail®	A set of applications that enables users to view and manage voice and e‑mail messages on their desktop, which can be run as a stand‑alone application or integrated with one of the supported e‑mail systems.

Getting Started with the UM8000 Messaging System

Read Before You Proceed

From the system installation, you should have successfully installed the system and configured the following:

- Installed the UM8000 messaging system.
- Configured network settings.
- Configured date and time.
- Configured enhanced system security.
- Registered the messaging system.
- Integrated the phone system.
- Integrated the email for text-to-speech.
- Configured *Presence*.
- Installed and configured remote maintenance tools and options.

> **IMPORTANT** If you have not configured the UM8000 messaging system as instructed in *System Installation Guide* after the system installation, you may not be able to properly configure your messaging system as instructed in this guide.
>
> Refer to *System Installation Guide* to set up your messaging system in order to be able to administer and manage the messaging system.

Overview

The messaging system simplifies the messaging process by storing communications in a universal mailbox. The system provides the flexibility to manage voice and e‑mail messages from any location.

This chapter describes how to navigate through the Web Administration Console (WAC), introduces the basic system concepts, and explains the role of the system manager.

Explore the Web Administration Console (WAC)

When you have completed the initial setup, you will be taken to the main page of the Web Administration Console (WAC) as displayed in
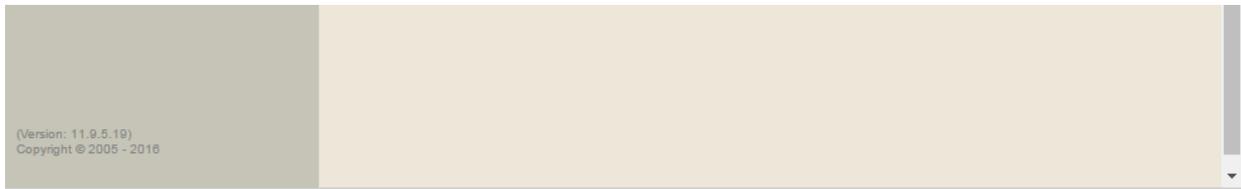
Figure 1. WAC Main . The WAC consists of the three major areas: **(A) Title Bar**, **(B) Navigation Pane**, and **(C) Page**. The description of each area is explained in more details in the subsequent sections.
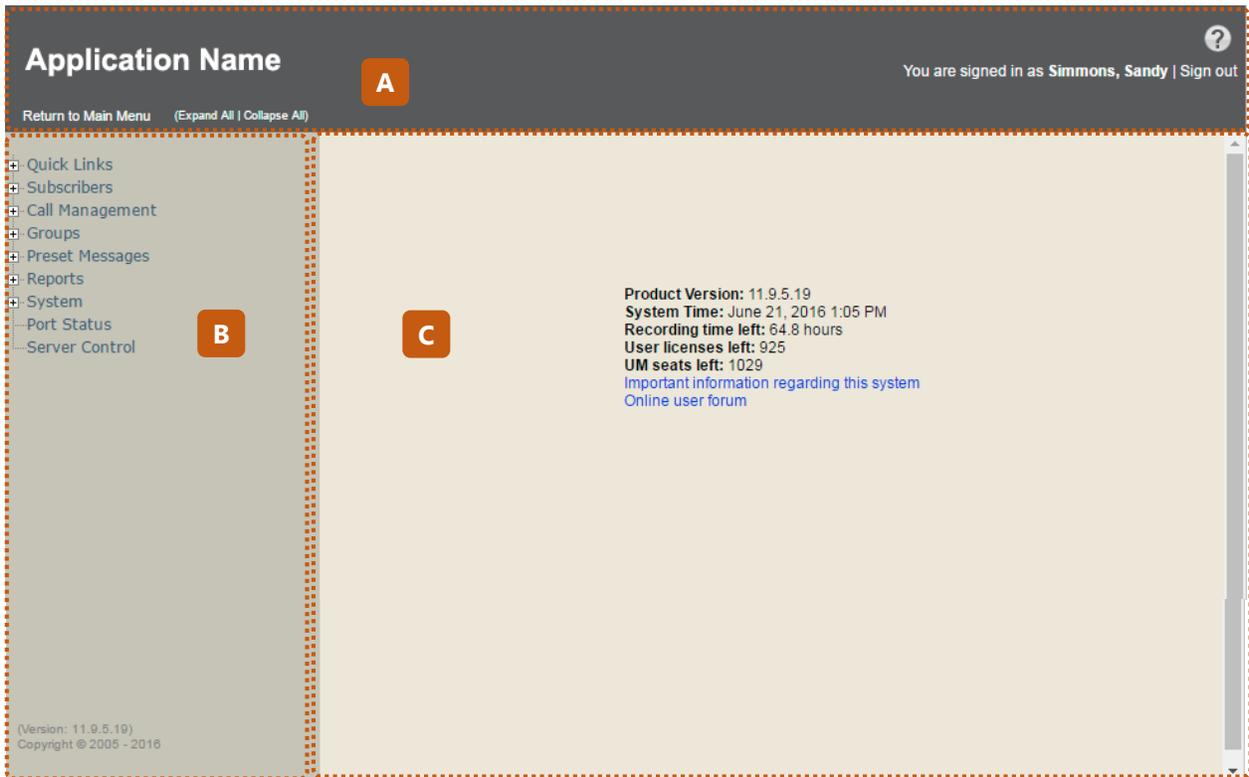
Figure 1. WAC Main Page

(A) Title Bar

The **Title Bar** is a fixed area at the top of the WAC that contains the application name, options for performing general tasks, and the name of the user who is currently logged in.

Title Bar Items

- **Return to Main Menu**. Returns to the main page of the WAC.
- **(Expand All | Collapse All)**. Expands or collapses all menus and their sub-menus in the Navigation Pane.
- **Help.** Opens a help for the page you are viewing.
- **User Information**. Displays the name of the subscriber who has signed into the WAC.
- **Sign out**. Signs out of the WAC and returns to the Sign-in page.

Title Bar Icons

When clicking a menu item in the **Navigation Pane**, a set of icons appear at the top right corner of the **Title Bar**, which allows you to perform certain tasks applicable for each page.

Application Name

You are signed in as **Simmons, Sandy** | Sign out

Return to Main Menu   (Expand All | Collapse All)

Figure 2. WAC Title Bar Icons

> **NOTE** Depending on which menu item's content is being displayed on the page, a different set of icons will be displayed.
>
> **For example:**
> - On a subscriber page, all icons will be displayed.
> - On the **Usage Reports** page, only the ▶ **Run** and ⑦ **Help** icons will be displayed.
> - On the **Switch Information** page, only the 🖫 **Save** and ⑦ **Help** icons will be displayed.

Table 2. Title Bar Icons in Web Administration Console

Icon	Name	Description
🖫	Save	Save any changes made to the page.
		NOTE The **Save** icon becomes active when you make edits to the page you are viewing.
🔍	Search	Search for items of the type you are currently viewing.
		NOTE This **Search** icon appears only the pages that have searchable items.
➕	Add	Add items of the type you are currently viewing.
➖	Delete	Delete items of the type you are currently viewing.
⬅	Previous	Go to the previous record.
		NOTE This **Previous** and **Next** icons become active when there are any previous or next items available that you can move to.
➡	Next	Go to the next record.
⑦	Help	Open the WAC help.
▶	Run	Click to run a report or other WAC application.

(B) Navigation Menu

The **Navigation Menu** at the left side of the WAC contains menu items that you can click to view or edit. The contents of each menu item are displayed in the Page at the right side of the WAC.

Each menu item in the Navigation pane might contain one or more pages. These menu items can be expanded or collapsed. Some menu items also have sub-menu items denoted by a plus (+) sign.

To view a page, click a menu item. If a menu item has a + sign, clicking the item will expand and display all sub-menu items.

Navigation Pane Menu Items

- **Quick Links**. Quick links to frequently accessed pages.
    - **Subscribers**. Links to subscriber profile page.
    - **Port Status**. Displays port status page.
    - **Server Control**. Displays server control page.

- **Subscribers**. Use these pages to configure settings for individual subscribers and guests, and to create templates. Settings include schedules, passwords, account permissions, phone greetings, call processing, and transfer options.

- **Call Management**. Use these pages to specify how UM8000 answers, routes, transfers, and records calls. Settings include call handling settings for the operator, opening greeting, any routing applications and menus, languages, and voice detect applications.

- **Groups**. Use these pages to configure or create message and directory groups.

- **Hotel Guests**. Use these pages to configure settings for hotel guests. Settings include greetings, passwords, wake-up calls, call handling, and message waiting notification.

    > **NOTE** The hotel guest pages are only available if the optional hospitality package is licensed.

- **Reports**. Use the Reports pages to generate reports of subscriber-based or system- based information, including message activity, message groups, phone sign-ins, disk storage, administration access, port usage, software information, and fax activity.

- **Network**. Use the network pages to add and view locations within a messaging system network.

    > **NOTE** The network pages are only available if the optional networking package is licensed.

- **System**. Use the System pages to set general information about the messaging system, such as site contact information, message storage and playback settings, system prompts, schedules, port settings, and phone system integration.

- **Port Status**. Use Port Status page to view the current activity and status of each port or incoming phone line.

- **Server Control**. Use the Server Control page to start or stop the messaging system software.

(C) Page

The **Page** at the right side of the WAC displays fields and data appropriate for each menu item. The **Page** is the main area where you would actually perform tasks (e.g. starting/stopping the server, managing subscribers, configuring the system to work with your phone, etc.). Thus, the contents for each menu item will be different.

However, you can always click the **Return to Main Menu** link in the **Title Bar** to return to the main page of the WAC and view general status information of your messaging system and some notices and warning if applicable.

Main Page Notices

If there are any warnings or notices available that you should be aware of, they will be displayed at the top of the **Page**. Some warnings or notices include current status of your system, expiration of the software based licensing, system update information, any urgent issue with the system that needs to be resolved, etc.

The voice messaging software is not started.
Click here to start the messaging system

Your software assurance will expire in 1 days. Please contact your vendor to renew your support contract.

1 New Update(s) Available

There is an issue with the system license. The license provider could not be contacted or the system license could not be verified. If problem is not resolved by 07/02/2016 00:30, the product will stop running.

Figure 3. WAC Main Page Notices

Main Page Items

When you sign-in to the WAC, you will see the following items on the main page.

- **Product Version**. Displays the current version the messaging system.
- **System Time**. Displays the current time of the messaging system.
- **Recording time left**. Displays the number of hours available to store more recordings.
- **User licenses left**. Displays the number of user licenses left for the subscribers.
- **UM seats left**. Displays the number of Unified Messaging licenses left for the subscribers.
- **Important Information**. Click this link to read additional information about the administrator tool.
- **Online User Forum**. Click the link to join or participate the online user forum to view the latest notices about the product, read blogs, and share your thoughts and feedback regarding the system.

Stop/Start the Messaging Server

Some procedures require the messaging system to be shut down and restarted before the changes become active. When shutting down the messaging system, busy ports are shut down after the current call is disconnected. The messaging system software does not answer or place calls when it is shut down.

The messaging system software can be shut down and restarted using the Web Administration Console (WAC) or Maintenance Menu on any remotely connected computer.

Shut Down the Messaging System

The server might need to be shut down and restarted if the messaging system does not properly restart or behaves erratically. When the server is stopped, the system shuts down each port as calls are disconnected, after all ports are shut down the messaging system software is shut down.

CAUTION Clicking the ■ **Stop** icon multiple times might cause the system to lock up or damage to data.

NOTE The messaging system may take more than 60 seconds to completely shut down or start.

To shut down the messaging system using the WAC:

1 Sign in to the Web Administration Console (WAC).

2 From the navigation menu, select **Server Control**. The **Server Control** page displays.
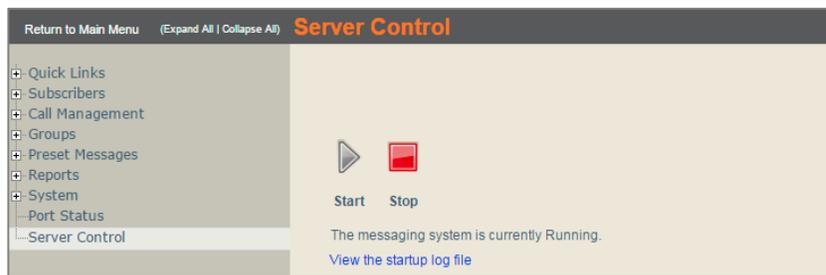
3 Click the ■ **Stop** icon.

To shut down the messaging system software at the Linux server:

1 On the Linux desktop, right‑click the **System Status** icon.
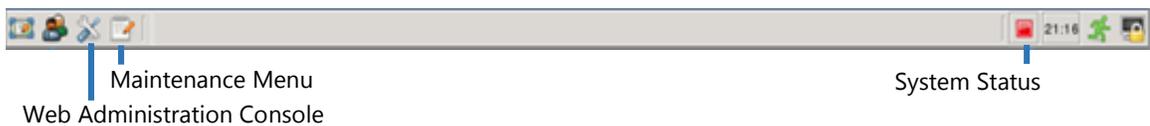
2 Select ■ **Stop** the voice message system.

Start/Restart the Messaging System

To restart the messaging system using the WAC:

1 Sign in to the Web Administration Console (WAC).

2 From the navigation menu, select **Server Control**.

3 Click the ▷ **Start** icon.

To restart the messaging system software at the Linux server:

1 On the Linux desktop, right‑click the **System Status** icon.

2 Select ▷ **Start**.

3   Click **Yes** to confirm that you want to stop the messaging system. The **System Status** icon changes from red to yellow while the software is restarting.

Sign In/Out of the Linux Desktop

The messaging system requires you to sign-in as a system manager before you can change any system settings. Use the following procedures to sign-in to and to sign out of the messaging system server.

To sign-in to the Linux desktop:

1   Restart the messaging system server.

2   On the **Welcome to Vmail** dialog box, type your sign-in name, and then press `ENTER`.

3   Type your password, and then press `ENTER`. The Linux desktop appears.

To sign out from the Linux desktop:

1   Click **Lot Out Dialog** at the lower right corner of the desktop.

2   Click **Log Out**, **Restart**, **Shut Down**, or **Cancel**.

Start/Stop the Linux Operating System

The Linux operating system can only be shut down at the messaging system server using a command.

> **NOTE** Only the administrator with the proper permission can remotely start/stop the Operation System.

To shut down the Linux operating system:

1   Log on to a client computer and use SSH to connect to the messaging system server or log on to a local console.

2   Sign in as Admin. The **Maintenance Menu** opens.

3   From the main menu, select **2 Maintenance**, and then click **OK**.

4   On the **Maintenance** screen, select **2 Command**, and then click **OK**.

5   On the command line, type *poweroff*, and then press `ENTER`.

To restart the Linux operating system:

1   Connect to the messaging system through SSH using a client computer or log on to a local console.

2   Sign in as Admin. The **Maintenance Menu** opens.

3   From the main menu, select **2 Maintenance**, and then click **OK**.

4   On the **Maintenance** screen, select **2 Command**, and then click **OK**.

5   On the command line, type *sudo shutdown –r now*, and then press `ENTER`.

> **NOTE** The messaging system restarts automatically after the server is restarted. If the messaging system does not restart, use the WAC or Maintenance Menu to start the messaging system.

Role of System Managers

System Managers are responsible for the day‑to‑day management of the messaging system. The managers add and train new subscribers, operators, and other system managers, as well as answer questions about the system.

> **NOTE** On a system that has **Hospitality** licensed, it could have **Hospitality Managers**. Unlike **System Managers**, **Hospitality Managers** can only manage (add, edit, or remove) hotel guests, schedule messages for hotel guests, and access hospitality reports. However, they do not have access to the system-wide hospitality configurations.

System Managers can change mailboxes and greetings using a phone or the Web Administration Console (WAC). Periodically, they might need to update greetings to reflect holidays or other circumstances.

Any enrolled subscriber can be a system manager. Only system managers can assign or remove system manager status. A system manager might be asked to manage the following tasks:

- **Back up the system.**

    Routine backups protect the system and data from an unrecoverable system failure. It is recommended that you schedule backups on a regular basis.

- **Maintain subscribers and guests.**

    Subscribers can change many of their own mailbox settings. However, the system manager might need to change subscriber settings, add or delete guests, and customize guest settings.

    For more information, see the Managing/Configuring Subscribers chapter.

- **Monitor the system with reports.**

    Track system activity: incoming and outgoing calls, port usage, and subscriber access. Create reports to monitor the system on a regular basis.

- **Train new subscribers, operators, or other system managers.**

    Train new subscribers, operators, or system managers to use the system features.

- **Use the phone to maintain the system.**

    Use the phone and the system manager conversation to change mailboxes, greetings, schedules, and operator settings. For additional information, see the Change System Information Using a Phone section.

Who are System Users

There are three types of system users; and one hospitality user:

- **Subscribers**. A subscriber is an enrolled user. When subscribers call the messaging system, they identify themselves to the messaging system using a unique system ID. Subscribers manually enter their personal ID or the system might be programmed to automatically provide the ID.

    Subscribers can configure their own mailboxes during the first‑time enrollment conversation, or the mailbox can be configured by a system manager. A subscriber can own Interview Boxes, Voice Detect Boxes, Fax Boxes, message groups, and guests; as well as manage scheduled messages.

- **Guests**. Subscribers can provide specific individuals a personal interaction with the messaging system. The individuals might be customers, vendors, or other business relations. These individuals are enrolled as guests of a subscriber.

  When guests call the system and enter a personal ID, they are greeted by name and can exchange regular or urgent messages with the host subscriber. A guest can be a member of private message groups owned by the host subscriber. If you have a multilingual system, specify the language a guest hears when the guest calls into the system.

- **Unidentified Callers**. An unidentified caller is a subscriber, guest, or non-subscriber who accesses the messaging system without entering a personal ID. The unidentified caller has no system privileges and hears a different system conversation than a caller who enters a personal ID.

- **All Hotel Guests.** A hotel guest is a guest of the hotel. The hospitality feature must be licensed to create guests and assign room extensions to the guests. Guests have access to voice mail and can send messages to other guests.

Basic Concepts of the Messaging Server

The following is the basic messaging concepts in the system:

- **The message server consists of a concept of IDs for managing calls and users.**

  The messaging system listens for system IDs and personal IDs on a digit-by-digit basis. When a caller enters a system or personal ID, the system examines the first digit to see if it is a valid ID.

  - **Administrators** or **System Managers** can access certain types of system boxes or subscriber mailboxes using the IDs associated with the accounts to administer and manage calls and mailboxes or configure settings for users.
  - **Subscribers** or **Guests** can also use the IDs that were assigned to them to access the system to work with their messages, set options, and change account settings.

  For more details about the different types of IDs used in the messaging system, refer to the Understand the Personal IDs section.

- **The message server provides System Conversation.**

  The system conversation is a collection of prerecorded questions, prompts, and responses that the system plays to guide callers through the messaging system. The standard subscriber system conversation offers four basic settings each time a subscriber calls the system:

  - **Check new messages.** Subscribers and guests can listen to new messages.
  - **Leave messages.** Callers and subscribers can leave messages for other subscribers.
  - **Review old messages.** Subscribers can review old messages that remain on the system.
  - **Change setup settings.** Subscribers can change their personal settings.

- **Calls are handled and managed through the Boxes.**

  In the UM8000 messaging system, calls are processed through "Boxes". There are multiple boxes that can be configured to answer, route, transfer, and record calls as briefly described in the following list. For more details about each box and how to configure the settings, refer to the Managing Calls chapter.

- **Opening Boxes.** Manage how the messaging system routes incoming calls, greets callers, presents caller selections, and takes actions in response to the caller selections.

- **System Operator Boxes.** Specify how the system handles calls to the operator. The System Operator Boxes define the extension, call transfer settings, and greetings for the operator and actions taken if the operator is not available.

- **Transaction Boxes.** Route callers to different departments or provide day and night greetings which are defined by schedules. Use Transaction Boxes to configure special call handling, create menus, or play pre-recorded announcements.

- **Interview Boxes.** Provide information or collect information from callers.

- **Language Boxes.** Enable callers to select a language for the system conversation. Use Language Boxes only when the messaging system has more than one language installed.

- **Voice Detect Boxes.** A type of Transaction Box that listens for verbal caller responses instead of touch tones. It is used when the phone system or service area includes callers that do not have touch tone access and the messaging system is not configured to detect dial pulses.

- **Public Fax Box.** Provides fax detect, routing, and notification for incoming faxes eliminating the need for a dedicated phone line for a fax machine.

- **Fax Boxes.** Receive faxes routed to a particular system ID in addition to subscriber fax boxes. Use these fax boxes for special needs, such as collecting faxed résumés from job applicants or incoming orders from customers.

- **Unanswered calls go through the Transfer‑Greeting‑Action structure.**

  The call **Transfer‑Greeting‑Action** structure tells the system what to do if a call is not answered. The **Transfer‑Greeting‑Action** settings are set for subscriber mailboxes and Transaction Boxes. When a call enters the messaging system, the system tries to transfer the call.

  When a call enters the messaging system, the system transfers the call using the settings configured in the **Call Management** > **Transaction Boxes** > **Call Transfer** page. If the call is unanswered or call transfer is turned off, the system plays the greeting configured on the **Call Management** > **Transaction Boxes** > **Greetings page**.

  > For example:
  > The system might route the call to the operator, take a message, or route the call to a different box.

  The following flowchart illustrates a general **Transfer‑Greeting‑Action** structure when a call was transferred successfully.

Incoming Call
A call reaches a box.

Transfer
The system tries to transfer to an extension.

| **Greeting** |
| The system plays the Transaction Box greetings. |

| **Action** |
| If no touch tone keys are pressed, the system performs an actions, |
| such as routing the caller to the public interview box. |
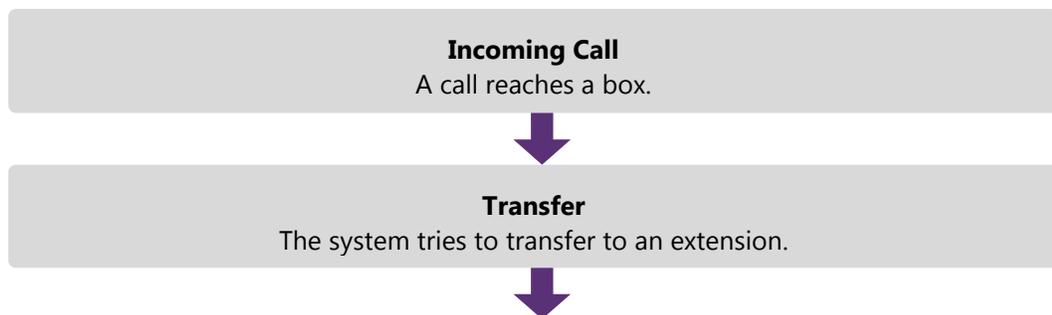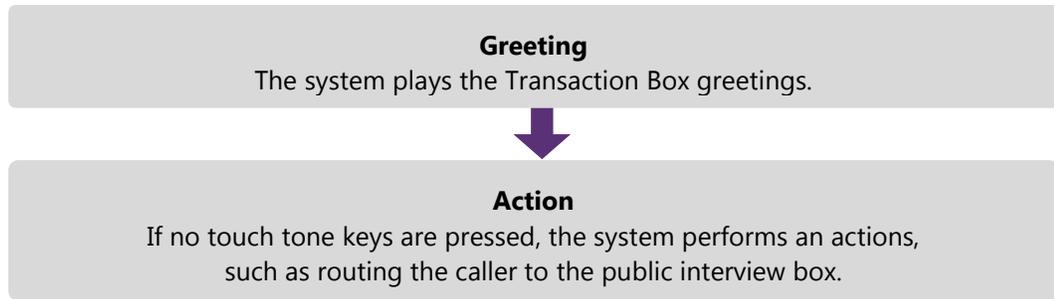
Figure 4. Flow of the Transfer‑Greeting‑Action Structure

Understand the Personal IDs and System IDs

The messaging system is managed through a set of IDs – Personal and System. The messaging system listens for Personal IDs and System IDs on a digit‑by‑digit basis as follows:

(1) A caller starts entering a Personal ID or System ID.

(2) The system examines the first digit to see if it is a valid ID.

(3) The system waits (as specified through the **One-Key Delay** option) and see if the caller dials the second digit.

   (a) If the caller enters the second digit, the system attempts to find the match for the digits entered from Personal IDs and System IDs.

   (b) If the caller does not enter the second digit, the system tries to match the first digit with the **One-Key Dialing** options of the Personal IDs and System IDs.

The method of listening for IDs provides a quick response because the system goes directly to the first available match. This means that a long ID that begins with digits that match a shorter ID are not permitted.

> **For example:**
>
> **234** and **2345** do not work as System IDs because system transfers calls to **234** before the caller can enter the final digit.

The best way to avoid this situation is to make sure that all System IDs contain the same number of digits.

> **NOTE** A security code or PIN is not a System ID. A security code is created by the subscriber, is known only to the subscriber, and is used with the Personal ID for the security of the messaging system.

Personal IDs & Extension ID

Personal ID is a unique ID that identifies a subscriber or guest to the system. The **Personal ID** enables users to log on to listen to messages, leave two‑way messages for others, and change their personal settings.

Extension ID is the number a caller uses to reach a subscriber's voice mailbox. The Extension is not always the same as the physical phone extension number.

> **For example:**

If two subscribers share the same extension, they have different extension IDs for their separate voice mailboxes.

The following table shows details about the IDs.

Table 3. Types of System IDs

ID Type	Field Name	Identifies	How Used
Personal ID	Personal ID	Subscriber Guest	**Callers** enter a personal ID to identify themselves to the system. Once identified as the **Subscribers**, they can listen to messages, leave two‑way messages for others, and change their personal settings. **Guests** use a personal ID to exchange two‑way messages with their hosts. The personal ID is usually created by using the subscriber extension number with a prefix digit. NOTE The prefix for **Personal ID** can be specified in the **Subscribers** > **Account Policy** page. Refer to the Configuring Subscriber Account Policy chapter for the instruction. **For example:** A subscriber with extension **4323** has a personal ID **94323**, where "**9**" is added as a prefix.
Extension ID	Extension	Subscriber's Mailbox	**Callers** enter an extension ID to reach a subscriber. NOTE The extension ID usually matches the phone extension number; however, if subscribers share the same physical phone extension, each subscriber has a different extension ID.

System IDs

System ID is a unique identifier associated with the call management boxes, fax box, directory group, and directory menu. **System IDs** can include numbers, letters, or the symbol $ (dollar sign).

The following table shows details about the System IDs.

Table 4. Types of System IDs

ID Type	Field Name	Identifies	How Used
Box ID	**System ID**	Interview Boxes Language Box Opening Box Transaction Boxes System Operator Boxes Voice Detect Boxes	**Callers** enter these IDs to reach a particular box. Box IDs are used for automatic routing of calls and in One-Key dialing menus.

Fax ID	System ID	Public Fax Box	**Callers** are routed to the fax box by entering the Fax box ID.
Directory Groups ID	**System ID**	Directory Menus	**Callers** using numeric directory assistance enter the Directory ID to access a department or individual.
Directory Menus ID	**System ID**	Directory Groups	Directory IDs are used to automatically route calls.
Numbered Group ID	**Name**	Message Group	When the name for a Message Group is in the numeric format to be used with outside caller group, it is considered a Numbered Group ID. **Subscribers** use the Numbered Group ID to send a message to a message group.
Directory Assistance ID	**Directory Assistance**	Automatic (alphabetic) Directory Assistance	**Callers** enter a Directory Assistance ID to reach the system directory of subscriber.

Default System ID Values

The messaging system comes with default values for System IDs.

> **WARNING** If any of the default system IDs are changed, the new ID must replace the old ID in all the fields where the old ID appears within the messaging system.
>
> Failing to replace the old ID will result in conversations with bad IDs.

The following table lists all default system IDs and the locations where they are found.

Table 5. Different Types of System IDs

Default System ID	Used by	Location
OPEN	Opening Box	Call Management > Opening Boxes
0 (zero)	System Operator	Call Management > System Operator Box
		CAUTION The **SV8300** phone systems and some regions may not support zero for the operator.
9696	Extension of Sandy Simmons, the default System Manager	Subscribers > Subscribers
$sandy or **$nec**	Personal ID of Sandy Simmons, the default System Manager	Subscribers > Subscribers

9555	Personal ID for Les Larson, the guest of Sandy Simmons	Subscribers > Guest
411	Department Box	Call Management > Transaction Boxes
700	Sales Box	Call Management > Transaction Boxes
800	Technical Support Box	Call Management > Transaction Boxes
$FAXBOX	Public Fax Box	Call Management > Fax Boxes > Public Fax Box
$PM	Public Interview Box	Call Management > Interview Boxes
$VOICE	Voice detect box	Call Management > Voice detect Boxes

Internal IDs

An internal ID is a special ID that cannot be entered using a phone keypad. To create an internal or hidden ID, use a **$** (dollar sign) as the first character of the ID. The **$** (dollar sign) cannot be entered using a phone keypad.

Internal IDs are used to route callers to voice detect boxes, transaction boxes, or interview boxes and to prevent callers from directly accessing the voice detect box, transaction box, or interview box. A public interview box with an ID of **$PM** can take routed calls but cannot be reached using a phone.

Assigning System IDs

> **NOTE** Duplicate system IDs are not permitted in the messaging system.

Before assigning system IDs:

- Estimate what kind and how many system IDs are needed.
- Design a simple, easy to use, system ID numbering plan and use it consistently. All system IDs should contain the same number of digits.
- Assign system IDs using numbers rather than letters. When system IDs are assigned by letters, duplication can occur.

  > **For example:**
  >
  > If there are system IDs named **SANDY** and **RANDY**, and their names are to be searched through the telephone keypad, the keypad letters translate into the same numeric values, **72639**.

The number of system IDs required in a system determines the number of digits used in the ID. The following table shows how many unique IDs are available for a particular numbering plan. When creating system IDs to allow for a range of unused system IDs; this enables future system expansion, for new subscribers, transaction boxes, interview boxes, and subscriber guests.

Table 6. Determining the Number of Unique IDs for an ID Numbering Plan

Number of digits in each ID	Number of unique IDs (assumes System Operator Box ID is 0)
1	9
2	90
3	900
4	9,000
5	90,000
6	900,000
7	9,000,000
8	90,000,000
9	900,000,000
10	9,000,000,000

NOTE Some phone systems might not support ten-digit system IDs.

Change System Information Using a Phone

System managers can change most system information using the Web Administration Console (WAC). However, system managers can also use a phone and the system manager conversation to change mailboxes, greetings, schedules, and operator settings.

Use a phone with the system manager personal ID and security code to hear the system manager conversation. After logging on, check or leave messages, change the setup options for the system manager's mailbox, or access the system manager settings.

The system manager settings consist of five questions or menu selections shown in the following table. Each question has a shortcut key. To immediately skip to a set of selections, press the shortcut key during the system manager conversation.

Table 7. Administrative Phone Menu

Menu Selections	Key	Meaning
Would you like to change a mailbox?	4	Add a new mailbox, determine whether or not a mailbox has a security code, delete security codes, or delete a mailbox.
		NOTE If a new mailbox is added via the phone, it is created based on the system's default template. If you want to choose a different template, add a new mailbox through the Web Administration Console.

If a mailbox is deleted, all of the transaction boxes, guests, private groups, interview boxes, and messages owned by that mailbox are deleted.

Would you like to change the opening greetings?	5	Switch to or from **alternate mode**, or change the day, night, or alternate greetings of opening greeting boxes.
Would you like to change the system schedule?	6	Hear the current system clock and date or change schedule #1.
Would you like to hear system information?	7	Hear information about the messaging system software version, the system key serial number, the available recording time, the system time, date, mode, and the number of active messaging system ports.
Would you like to change the operator settings?	8	Configure the operator mailbox extension. Configure the public fax box extension. Configure the public fax box to ask for voice annotation. Configure if a public message is recorded when a fax arrives.

Managing/Configuring Subscribers

The **Subscribers** > **Subscribers** pages provide settings that apply only to individual subscribers. Use the **Subscribers** > **Profile** page to configure custom preferences for each subscriber. This includes their name, recorded name, personal IDs, extension, language, time zone, presence integration, and more.

Subscriber information spans several pages in the Web Administration Console. Many of the settings can be changed using a system conversation.

When **Access Options** are set to allow the Mailbox Manager access, subscribers can change many of their own personal settings through the Mailbox Manager. This includes changing their greetings, how they receive notifications, profile settings, transfer and screening settings, and create groups.

For more information regarding how subscribers can change their settings using the Mailbox Manager, they can refer to *System User Guide*.

Customize Subscriber Profile Information

The **Subscribers** > **Profile** page contains specific subscriber information as follows:

- **Configure Presence Integration**

  Presence allows users to record greetings that are specific to their status, so the callers can hear meaningful information about the subscriber availability.

  There are two types of presence engines available in the system as follows:

  - **UC Desktop Suite**

    UC Desktop Suite delivers various Unified Communications capabilities to the user desktop, such as call and presence management. When integrated with the system, the subscriber greetings are automatically activated based on the UC Desktop presence, and users can use the Telephone User Interface (TUI), Web Mailbox Manager (WMM), or Mobile Web Mailbox Manager (MWMM) to set their system and UC Desktop presence.

  - **Internal engine**

    The internal presence engine allows administrators to define the available subscriber presence greetings, and allows the users to select the appropriate presence greeting from either the Telephone User Interface (TUI), WMM, or MWMM.

  > **NOTE** Select the Presence Engine you would like the subscriber to use. Desktop Suite integration requires Visual Messaging licensing.

- **Check Subscriber Message Counts**

  Displays the total number of new messages and the total number of messages for the selected subscriber. The total number of minutes of these messages is also displayed.

  > **NOTE** This field is read-only.

- **Delete Subscriber Messages**

  System managers can delete subscriber messages.

- **Reset Subscriber Passwords**

  Subscribers often lose their passwords and request a new password. System managers cannot assign a new password or look up an existing password. However, subscriber passwords can be reset to the **0000** or other default password. Once the password is reset, the subscriber must log on to the messaging system and create a new password.

- **Assigning a Subscriber System Manager Status**

  A System Manager has access to the systems web administration console. Any subscriber can be set to be a System Manager, by an existing System Manager. Do not assign too many System Managers as organizing activities can be complicated if there are too many System Managers. System managers should coordinate their activities to minimize conflicts and potential problems.

  There are two types of System Manager roles that can be assigned to a subscriber:

  - **System Manager** has access to all administration screens and settings.
  - **Hospitality Manager** has access to Hospitality guest screens and settings only.

- **Converting Subscribers to Hotel Guests**

  > **WARNING** Doing this will affect groups owned by the subscriber, such as deleting Private groups and reverting Open groups to system ownership.

  Check the **Convert subscriber to hotel guest** checkbox to make the subscriber a hotel guest. This selection is available only if the hospitality feature is licensed.

- **Forcing Password Change**

  Check the **Force password change** checkbox to force a user to change his or her password.

- **Configuring Subscriber Custom field and Scheduled Message Settings**

  At the bottom of the page are two fields. These are customizable fields that are used to assign tags to a subscriber. These tags will be used in the automatic selection of recipients for scheduled messages.

Add New Subscribers

New subscribers can be added one-at-a-time or as a range. When a range of subscriber mailboxes are added, they can be assigned to new subscribers as new subscribers are hired.

When you add a new subscriber, the messaging system automatically uses the settings specified in the subscriber template, these settings can be customized for the subscriber on the Subscriber Profile page.

To add a single subscriber:

1   In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Profile**.

2   In the Title Bar, click the 🟢 **Add** icon. The **Add Subscriber** page displays.
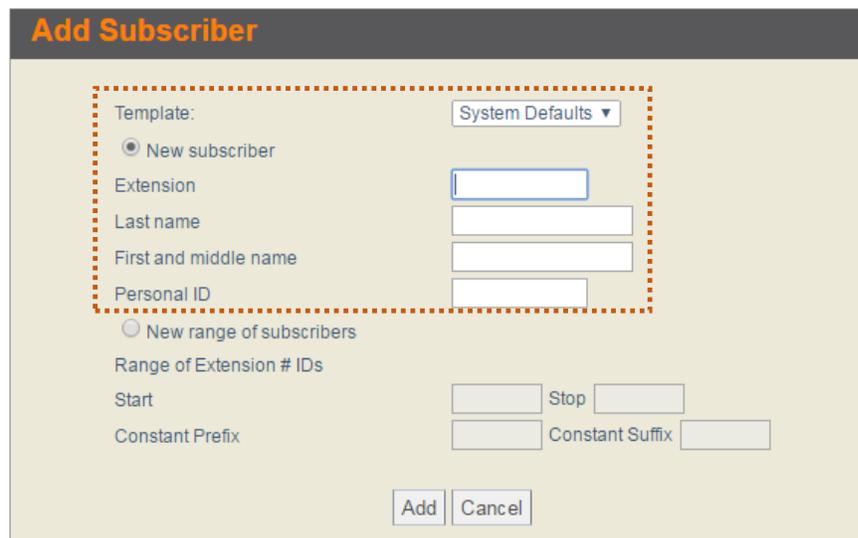
3   In the **Add Subscriber** page, configure the following options:

   a   From the **Template** dropdown list, select a template that will be used for the new subscriber.

   b   Select **New subscriber**.

   c   Type the **Extension**, **Last name**, **First name**, and **Personal ID**.

   d   Type **Fax ID**, available only if the Fax feature is licensed.

   e   Click **Add** to add another subscriber.

   f   Click **Done** or **Cancel** to close the **Add Subscriber** dialog box.

4   Repeat this step to add additional subscribers.

To add a range of subscriber mailboxes:

1   In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Profile**.

2   In the Title Bar, click the 🟢 **Add** icon. The **Add Subscriber** page displays.

Add Subscriber

Template: System Defaults ▼
        ○ New subscriber
Extension   [   ]
Last name   [   ]
First and middle name   [   ]
Personal ID   [   ]
        ◉ New range of subscribers
Range of Extension # IDs
Start   [   ]   Stop [   ]
Constant Prefix [   ]   Constant Suffix [   ]

                [Add] [Cancel]

3   In the **Add Subscriber** page, configure the following options:

a   From the **Template** dropdown list, select a template that will be used for the new subscriber.

b   Select **New range of subscribers**.

c   Type the **Start** and **Stop** values in the **Range of extension # IDs** fields.

d   [Optional] In the **Constant Prefix** and/or **Constant Suffix** fields, fill in the values. The digit or digits are in added to the default value defined in the personal ID prefix defined on the subscriber template profile page and the extension number.

e   Click **Add** to add another subscriber.

f   Click **Done** or **Cancel** to close the **Add Subscriber** dialog box.

> **NOTE** Back up the messaging system software and data after making significant changes to the messaging system. See online **Help** under the topic, **Backing Up the Messaging System Data.**

Edit/Change Subscriber Profile

To customize a subscriber profile:

1   In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Profile**.

2   Find a subscriber using the 🔍 **Search** icon or ◁ **Previous** & ▷ **Next** icons from the Title Bar. The **Profile** page for the selected subscriber is displayed.

3   Confirm that the **Last name** and **First and middle name** fields show the names correctly.

4   The **Personal ID** should follow the rules set on the subscriber template page. If **9X** is configured on the template page, the personal ID should display 9 and the extension number.

5   The subscriber's **Extension** number is displayed.

6 The **Automatically log on calls from** field enables subscribers to automatically log on from an external phone number or a conference room extension. This feature ensures that the subscriber can automatically log on using different phones in addition to their extension.

> **NOTE** This feature requires Automatic Number Identification (ANI) also known as Caller ID. Extension remapping can be used to remap extensions within the organization to enable automatic log on, but this field must be used to enable external phones to log on to the messaging system.

7 Click **Voice name** to record the subscriber name. Subscribers can record their names using a phone or the Mailbox Manager.

8 From the **Language** list, select the subscriber's preferred language. If a language is not selected, the subscriber will hear system conversations in the default system language.

> **NOTE** The **Language** list displays only the languages enabled as system languages on the messaging system.

9 In **Presence Integration**, choose the presence engine you would like the subscriber to use.

For more details about the presence engines, refer to the Configure Presence Integration description.

10 In **Time Zone**, select the subscriber's proper time zone, so the messages and schedules indicate proper time according to the location the subscriber resides in.

> **NOTE** Choosing the option **Default** will follow the system's time zone.

11 Click **Delete Messages** to delete all messages for the selected subscriber.

12 From the **Enable subscriber as system manager** dropdown list, select **System Manager** or **Hospitality Manager** to give the subscriber a manager status and access.

13 Select **Reset password to System Default password** to reset the subscriber's password if the subscriber has forgotten their password.

> **NOTE** When this option is selected, the **Force password change** option is also selected and you cannot modify the selection. Since subscriber passwords cannot be changed by a system manager, resetting password must force subscriber to set a new password.

14 Select **Convert subscriber to hotel guest** to convert the subscriber to a hotel guest. This feature is only available if the **Hospitality** feature installed.

> **NOTE** This option will convert the subscriber account into a hotel guest account with limited functionality. It will also delete private groups and re-assign open groups owned by the subscriber to the system.

15 Use the **Custom field 1** and **Custom field 2** boxes to assign tags or notes that will be used in the automatic selection of recipients for scheduled messages.

16 Click **Save** in the Title Bar.

Search for a Subscriber

Finding a particular subscriber profile can be time consuming when you have a large number of subscribers. The search function simplifies this task.

To find a subscriber by name or an extension:

1   In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Profile**.

2   In the Title Bar, click the 🔍 **Search** icon. The **Search and Select Subscriber** dialog box displays.
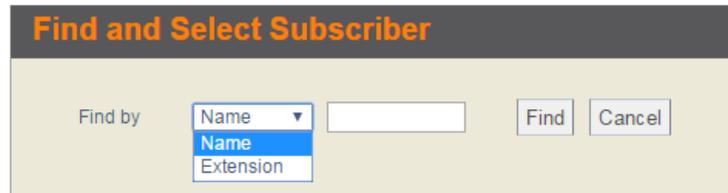
3   In the **Find by** option, select **Name** or **Extension**, and then type a complete string or partial string.

4   Click **Find**. The list of subscribers is displayed on the bottom.

5   Select the subscriber you are trying to find. The **Search and Select Subscriber** dialog box closes and the **Profile** page of the selected subscriber is displayed.

Delete Subscriber Information

The following subscriber information can be deleted from the messaging system database:

- Subscribers
- Subscriber's messages

When a subscriber is removed from the system, the messaging system automatically deletes all messages, private message groups, guests, transaction boxes, and interview boxes owned by the subscriber.

Subscriber's e‑mail messages are not deleted from the e‑mail system when a subscriber is removed from the messaging system.

To delete a subscriber:

1   In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Profile**.

2   Find a subscriber using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Profile** page for the selected subscriber is displayed.

3   In the Title Bar, click the ⊖ **Delete** icon to delete the subscriber.

4   Click **OK** to confirm.

To delete subscriber messages:

1   In the Navigation Pane, click **Subscribers** > **Subscribers** > **Profile**.

2   Find a subscriber using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Profile** page for the selected subscriber is displayed.

3   Click the **Delete Messages** button to delete the subscriber's voice messages.

4   Click **OK** to confirm.

Reset Subscriber Password

The subscriber's password cannot be retrieved, deleted, or changed by a system manager. However, you can reset the subscriber password to the system default when a subscriber forgets their password.

Once you configure reset subscriber's account, the subscriber will be forced to change their password once they log in to their account using the system default password.

To reset subscriber security codes:

1   In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Profile**.

2   Find a subscriber using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Profile** page for the selected subscriber is displayed.

3   Select the **Reset password to System Default password** checkbox.

> **NOTE** When this option is selected, the **Force password change** option is also selected and you cannot modify the selection.

4   Click 💾 **Save** in the Title Bar.

Assign System Manager Status

Any enrolled subscriber can be a system manager. However, only existing system managers can assign system manager status to other subscribers. There must be at least one system manager for the messaging system. If there is only one system manager in the system, that subscriber cannot be demoted from system manager.

You should have at least two system managers, possibly as many as three or four. Keep in mind that you must coordinate with other system managers when updating the messaging system database.

To assign system manager status:

1   In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Profile**.

2   Find a subscriber using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Profile** page for the selected subscriber is displayed.

3   From the **Enable subscriber as system manager** option, select **System Manager**.

4   Click 💾 **Save** in the Title Bar.

To remove system manager status:

1 In the Navigation Pane, click **Subscribers** > **Subscribers** > **Profile**.

2 Find a subscriber using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Profile** page for the selected subscriber is displayed.

3 Make sure that the subscriber information you have selected is displayed.

4 In the **Enable subscriber as system manager** option, select **None**.

5 Click 💾 **Save** in the Title Bar.

Change Subscriber Access Settings

The **Access Options** page controls how subscribers access and use system features. The subscriber template defines general access options for all new subscribers. Use the **Subscribers** >**Subscribers** > **Access Options** page to customize individual subscriber access.

To change subscriber access options:

1 In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Access Options**.

2 Find a subscriber using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Access Options** page for the selected subscriber is displayed.

3 Select or clear the access settings.

   For more details about each Access Option, refer to Appendix A – Configuration Options.

4 Click 💾 **Save** in the Title Bar.

Configure Subscriber Call Transfer Settings

The **Call Transfer** feature puts a call on hold, and then dials the extension. The messaging system can be configured to allow multiple callers to hold for a busy extension. There are three different types of **Call Transfer**:

- **Release**. The messaging system completes the transfer without checking whether the call is answered or there is a busy signal.

- **Await answer.** The system waits for the extension to be answered before connecting the caller to the extension. When the call is transferred, it is supervised and **ring-no-answer** or **busy extensions** are recalled, and then the appropriate action is taken.

- **Wait for ringback.** The messaging system waits for an extension to ring a certain number of times before releasing the call to the phone system.

The most common transfer type is **Release**. The **Await answer** transfer type is required to configure **Call Screening** and **Call Holding**.

The messaging system can be configured to allow multiple callers to hold for a busy extension. **Call Transfer** must be turned on and the transfer type must be set to **Await answer** or **Wait for ringback** to enable call holding.

The **Call Screening** feature screens calls transferred to a subscriber according to the call holding and screening rules configured for specific subscribers.

Customize **Call Transfer** settings for individual subscribers on the subscriber's **Call Transfer** page. All new subscribers inherit the call transfer settings configured on the **Call Transfer** page of the template that was used.

System Managers also have the option to expose/hide the **Call Screening** and **Call Transfer** options for the subscribers to be able to configure their own settings. In order to allow this, from the **Subscribers** > **Subscribers** > **Access Options** page, select **Allow to change phone notification settings and call screening options** in the **Administration** section.

When this option is selected, the subscribers can configure their options as follows:

- **Call Screening.** The subscribers can enable/disable **Call Screening** and configure the options on how call screening should be performed and what should be prompted or announced to the caller.

- **Call Transfer.** The subscribers can enable/disable **Call Transfer** and enter the destination phone number.

> **NOTE** The options on how the **Call Transfer** should be performed can be configured only by the System Manager.

To configure subscriber transfer settings:

1. In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Call Transfer**.

2. For more details about each Call Transfer option, see the Call Transfer Options section.

3. Find a subscriber using the 🔍 **Search** icon or ◀ **Previous** & ▶ **Next** icons from the Title Bar. The **Call Transfer** page for the selected subscriber is displayed.

4. Select the **Enable call transfer** checkbox to turn on the call transfer feature.

5. Select **Check for dial tone before transferring** to enable the messaging system to listen for a dial tone before attempting to transfer a call, and then select one of the following:

   - Select **Transfer to subscriber's extension** to transfer calls to the subscriber's extension.

   - Select **Transfer to**, and then type the transfer-to number in the text box, to transfer calls to a number other than the subscriber's extension.

6. From the **Transfer type** list, select **Release**, **Await answer**, or **Wait for ringback**.

7. If the call transfer type **Await answer** or **Wait for ringback** is selected, then in the **Wait for... rings** field, select a minimum of 3 rings. The default value is **4** rings. This forces the messaging system to wait for 3 rings before the call is transferred.

8. Select the **Allow holding** checkbox to allow the callers to be able to hold if the line is busy.

> **NOTE** The **Allow holding** and **Use VOX holding** options are not available with the **Release** transfer type.

9. Select the **Use VOX holding** checkbox for voice detect call holding. Callers speak to hold instead of pressing a touch tone key.

10 In the **Transfer/Screening options** section, click the **Use customized prompt for Gather Account Number** timestamp to record a customized prompt to gather caller information.

11 Select one of the following **Transfer/Screening options**:

- If you want to enable certain **Call Transfer** options, select the **Use transfer** radio button.
- If you want to enable certain **Call Screening** options, select the **Use screening** radio button.

After selecting one of the options above, select one or more of the following sub-options:

> **NOTE** These options are available only with the **Await Answer** transfer type.

- **Gather phone number.** Ask callers to provide a phone number.
- **Gather account number.** Ask callers to provide their account number. Click the **Use customized prompt for Gather Account Number** timestamp to record a custom prompt.
- **Announce transfer.** Play a beep before connecting the caller. With most phone systems, this lets the subscribers know when the call is connected or that the call is from an external caller.
- **Confirm before transfer.** Ask if the subscriber wants to take the call before the system transfers the call. If the subscriber does not take the call, the system plays the appropriate greeting and takes the action specified in the **After Greeting** section from the **Subscribers** > **Subscribers** > **Greetings** page.
- **Introduce caller.** Play the "Call for <subscriber's name>" prompt before connecting the call. Use this option when more than one subscriber uses the same extension.
- **Record caller's name.** Ask callers to record their name. Before the call is transferred, the subscriber hears the "Call from <caller's name>" prompt.

  If the subscriber rejects the call or is not available, the recorded name is not saved.

- **Record and save caller's name.** Ask callers to record their name. Before the call is transferred, the subscriber hears the "Call from <caller's name>" prompt.

  If the subscriber rejects the call or is not available, and the caller leaves a message, the recorded name plays at the beginning of the message.

  If the caller does not record a message, the subscriber receives the caller's recorded name as the message.

12 Click 💾 **Save** in the Title Bar.

Configure Subscriber Greetings

Each subscriber has a set of **Active Greeting**, **Busy Greeting**, and **Alternate Greeting**. System managers can listen to and record subscriber greetings. Use this page to select an active greeting, activate or deactivate the busy greeting, or customize the **Transfer‑Greeting‑Action** sequence.

> **NOTE** Depending on the **Presence Integration** type – **Internal** or **UC Desktop Suite** – the subscriber is configured with, the list of **Active Greetings** may appear differently for each subscriber.
>
> The subscriber's **Presence Integration** can be configured in **Subscribers** > **Subscribers** > **Profile**.

When a busy greeting is activated and a caller is transferred to the busy extension, the messaging system plays a greeting telling the caller that the extension is busy. A subscriber can include an **One-Key Dialing** menu in the greeting enabling a caller to press a single key to select where to route the call.

NOTE Only system administrators can program one-key dialing. Notify subscribers to change their greetings when **One-Key Dialing** rules are changed.

To change greeting settings:

1   In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Greetings**.

2   Find a subscriber using the 🔍 **Search** icon or ◀ **Previous** & ▶ **Next** icons from the Title Bar. The **Greetings** page for the selected subscriber is displayed.

3   In the **Active Greeting** section:

   • Select the desired greeting name.

   • Click the **Record** timestamp to record the greeting.

   NOTE Depending on the **Presence Integration** type the subscriber is configured with, the list of **Active Greetings** may include all or some of the following greetings:

   In the Office, On Vacation, Business Travel, In a Meeting, Out to Lunch, Sick, Gone for the Day, Out of Office, Unavailable

   NOTE When using the **UC Desktop Suite**, the Desktop Suite may override changes to greetings made in the voicemail system. This can occur when the UC Desktop Suite's settings override the voicemail system.

   For information on this, refer to the UC Desktop Suite documentation.

4   For the **When the subscriber's extension is busy** option:

   • Select **Enable busy greeting** if you want the busy greeting to be played when the subscriber's extension is busy.

      NOTE The **Busy Greeting** may be enabled and disabled from **System** > **Configuration** > **Presence Greetings**.

   • Do not select **Enable busy greeting** if the subscriber does not have a presence greeting recorded. Callers will hear the "<Subscriber name> + <System recording for the selected presence>" prompt.

      If the subscriber recorded a personalized **Standard Greeting**, the personalized standard greeting will play.

5   For the **Alternate Greeting** option:

   • Select if you want the **Alternate Greeting** to be played regardless of the **Active Greeting** or **Busy Greeting** selection.

   • Click the **Record** timestamp to record the greeting.

6 In the **Return date and time** section, select **Announce return date and time when available** if you want to announce callers when the subscriber will be available.

7 In the **After greeting** section, select one of the following to specify the action the messaging system takes after playing the greeting:

- **Take a message.** Records a message for the owner of the voice mailbox.

- **Take a message for group.** Records a message for the specified group. If selected, type the name of the group in the textbox in order to receive the messages.

- **Route to operator.** Routes callers to the system operator box.

- **Route to.** Routes callers to another system ID. When selected type a system ID in the field.

- **Hang up.** Disconnects without saying good‑bye.

- **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good‑bye and disconnects.

- **Restart.** Returns callers to the opening greeting box.

8 Click 🖫 **Save** in the Title Bar.

Configure Subscriber One‑Key Dialing

One-Key Dialing enables callers to press one touch tone key to go to a particular location within the messaging system.

For example:

Callers can quickly be routed to Directory Assistance, Subscribers' Extensions, Transaction Boxes, Voice Detect Boxes, Language Boxes, Interview Boxes, or a Fax Extension.

When a caller presses a key that is set for one‑key dialing, the messaging system immediately acts on that key press.

Specify an interval, in seconds, for the system to pause and wait for additional key presses. The pause enables callers to bypass one‑key dialing to dial an extension number.

Only a system manager can program **One-Key Dialing**. Subscribers must carefully consider how they want to use **One-Key Dialing** and submit a request to the system manager. Once the **One-Key Dialing** has been programmed, the subscriber must record their greetings or after message routing to reflect the programmed **One-Key Dialing** rules.

> **NOTE** As noted, only system managers/administrators can program one‑key dialing. Notify subscribers to change their greetings when one‑key dialing rules are changed.

To configure subscriber one-key dialing:

1   In the Navigation Pane, go to **Subscribers** > **Subscribers** > **One‑Key Dialing**.

2   Find a subscriber using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **One-Key Dialing** page for the selected subscriber is displayed.

3   In the One‑key delay field, type the number of seconds of delay between key presses. The delay enables callers to bypass one‑key dialing and enter a system ID.

4   Click 💾 **Save** in the Title Bar.

5   Re-record the greeting and describe the **One-Key Dialing** menu.

Configure Subscriber Message Handling

When a new message arrives, it is stored until the subscriber listens to it. Once a subscriber has listened to a message, the message is marked as **old** and is **saved** for a specified number of days depending on their message retention configuration.

Subscribers can **archive** messages to listen to or respond to at a later date. An archived message is saved for a longer period of time than an old message. Subscribers must archive a message again each time they listen to the message or it is deleted. A message can be archived an unlimited number of times.

The messaging system indicates when messages are waiting, using an indication light on the phone, a distinctive dial tone (such as a stutter tone), or a message display.

The subscriber messaging handling options can be configured through the **Subscribers** > **Subscribers** > **Messages** page. On this page, you can configure the following options:

- **Unidentified Caller Messages**

  When an unidentified caller leaves a message in the subscriber inbox, you can configure the message handling options when the caller finishes recording the message such as route the call to other extension, hang up, restart, etc. You can also configure how the message will be delivered to the subscriber.

- **Message Retention**

  The number of days the messaging system retains a message that has been heard but not archived. If the value is set to 0 (zero), the message is kept until midnight on the day it was first heard.

- **Message Storage Limits by Message Size or Quantity**

  The maximum number of storage size in megabytes or received messages permitted in the subscriber inbox. When this number is reached, the system stops recording new messages for the caller until messages have been deleted. If configured, the system will notify the subscriber on log on that the limit has been reached and suggest that messages should be deleted.

- **New/Old Message Order**

  Set the order in which messages are played in subscriber inbox.

To configure message handling:

1 In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Messages**.

2 Find a subscriber using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Messages** page for the selected subscriber is displayed.

3 In the **Unidentified caller messaging** section, configure the following options as necessary:

   a Select **Allow callers to change messages they just recorded** to enable unidentified callers to edit or change their message after recording it.

   b In the **Maximum message length to record from an unidentified caller…seconds** field, type the number to limit the maximum message size in seconds.

   c Select **Message Auto Copy to** to enable automatic copying of messages to another extension. The original message is not deleted. Click **Search** to select another extension or subscriber.

   d Select **Delete on copy** to delete the original message after it is copied.

   e In the **Unidentified caller messages are marked urgent** field, select one of the following to specify the urgent message status:

   - **Always.** Automatically marks all messages urgent.
   - **Never.** Does not mark messages from unidentified callers urgent, and does not allow the caller to mark a message urgent.
   - **As specified by caller.** Allows callers to leave an urgent message for the subscriber.

   f In the **After taking a message** field, select one of the actions that you want the system to take after callers finish recording their message:

   - **Route to.** Routes callers to another system ID. When selected type a system ID in the field.
   - **Route to operator.** Routes callers to the system operator box.
   - **Hang up.** Disconnects without saying good‑bye.
   - **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good‑bye and disconnects.
   - **Restart.** Returns callers to the opening greeting box

4 In the **Message Retention** section, configure the following options as necessary:

- In the **Keep old messages for... days** field, type the number of days the messaging system should retain old messages that have been heard but not archived.

  > **NOTE** If you type 0 (zero), the message is kept until midnight on the day it was first heard. Messages are deleted at midnight on the day they expire.

  > **NOTE** The time is relative to the system's time zone. If subscribers are set to non-local time zones, their accounts will not have the message deleted at midnight in their respective time zone.

- In the **Keep archived messages for... days** field, type the number of days the messaging system should retain archived messages.

5 In the **Limit message storage** section, configure the following options as necessary:

  > **NOTE** This section specifies the message storage space used, in MB on the messaging system, not the number of messages a subscriber can store.

- Select **Maximum message storage (in MB)**, and then type the maximum size of message storage in megabytes allowed for the messaging system.

- Select **Warn subscriber when the message storage reaches (in MB)** and type the message storage size that triggers to notify the subscriber on log on that the message storage limit has been reached and suggest that messages should be deleted.

6 In the **Limit message quantity** section, configure the following options as necessary:

a In the **Applies to** field, select which messages are counted in the limits:

- **Voice messages only.** Only count voice messages.

- **All messages.** Count voice, transaction box messages, interview box messages, and fax boxes.

b Select **Maximum number of messages**, and then type the maximum number of the received messages permitted in the subscriber inbox.

c Select **Warn subscriber when the number of messages reaches**, and type the number of message limit that triggers to notify the subscriber on log on that the message storage limit has been reached and suggest that messages should be deleted.

d Select **Include Transaction Box messages in quantity calculations** to count messages left in Transaction Boxes owned by the subscriber in the limit count.

7 In the **New Message Order** field, select one of the following options to set how the messages are displayed:

- **LIFO. Last In First Out**: Play most recent message first.

- **FIFO**. **First In First Out**: Play the oldest message first.

8 In the **Old Message Order** field, select **LIFO** or **FIFO** to set how the old messages are displayed.

9 In the Title Bar, click the **Save** icon.

Configure Subscriber Message Indication and Notification

The messaging system notifies subscribers that new messages are available using **Message Waiting Indicator** and **Message Notification**.

- **Message Waiting Indication.** A feature on a phone that alerts subscribers when they have messages waiting, such as an indication light, distinctive dial tone, or LCD display.

- **Message Notification.** Message notification can be sent to the subscriber extension or other external phones that the system automatically dials. Each subscriber can be configured with up to five devices for message notification.

To configure Message Waiting Indication:

Control message indication for each subscriber on this page. Subscribers can use the Mailbox Manager to change their message notification settings.

1   In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Notification**.

2   Find a subscriber using the 🔍 **Search** icon or ◀ **Previous** & ▶ **Next** icons from the Title Bar. The **Notification** page for the selected subscriber is displayed.

3   In the **Message indication** section, select **Enable Message Waiting Indication (MWI)** to turn on the message waiting indicator light as new messages arrive. Then, select one of the following:

- Select **At subscriber's extension** to use subscriber's extension for message waiting indication.

- Select **At extension** to set a different extension if the subscriber receives messages on a different extension.

> **NOTE** Multiple extensions can be added separated by a comma, space, or semi-colon.
>
> If adding a range of numbers, use a dash between the beginning of the range and the last number in the range.
>
> **For example:**
>
> To include extension **845**, **922**, and **950 through 960**, enter: ***<845;922;950-960>***

> **IMPORTANT** Note the following:
>
> • Do not enable MWI at more than ten (10) extensions. Note that entering a value like <1000-1999> would enable MWI at 999 extensions. This will likely create system performance issues.
>
> • The angle brackets <> are only required when more than one extension is used for MWI. They are not required for a single extension MWI.
>
> • The MWI extension field is limited to 40 characters.

4   Specify the **Current MWI state** as being **Off** (the default) or **On**.

To configure Message Notification:

Specify the device used for notification, frequency of message notifications, and if the messaging system notifies the subscriber of all messages or only urgent messages. Control message delivery schedules for each subscriber on this page. Subscribers can use the Mailbox Manager to change their message notification settings.

1 In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Notification**.

2 Find a subscriber using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Notification** page for the selected subscriber is displayed.

3 In the **Message notification** section, select a device from the dropdown list.

Devices that can receive message notification include: **Work phone**, **Home phone**, **Pager phone**, **Spare phone**, and a **Fax phone**.

4 Select **Enable** to turn on message delivery to the device selected, and configure the sub-options as follows:

- Select **At subscriber's extension** to dial the subscribers extension to notify of the new message. Select this option if the device is the subscriber's work phone.

- Select **Other number** and provide the phone number for a different device. The new message notification will be delivered to that device.

5 In the **Schedule** section, select hours and days when the device specified in **Step 3** should be used for message delivery.

- In the **from** and **to** fields, select start and stop time for message delivery.

- Select the checkboxes for the days for message delivery.

6 In **Delivery method**, select from **Each**, **Urgent**, or **Batch** as follows:

- **Each.** Starts message delivery as soon as each new message arrives and repeats delivery each time a new message arrives. Delivery delay is not available with this method.

- **Urgent.** Starts message delivery only when a new urgent message arrives and repeats delivery each time a new urgent message arrives. Delivery delay is not available with this method.

- **Batch.** When a new message arrives, the messaging system waits the specified delivery interval before making an attempt to notify the subscriber. With this method, the system delivers messages no more frequently than the scheduled interval.

   NOTE Batch notifications include all messages received during the interval between delivery attempts.

7   If **Batch** is selected from **Step 6**, the **Wait … minutes before the first delivery attempt** box becomes active.

   In the box, type the number of minutes the system waits before delivering a message after it arrives. Use this setting to assign priorities to each message delivery phone number.

   For example:

   If you type 0 (zero) for **Work Phone** and 60 for **Home Phone**, for the first 60 minutes, the messaging system tries to deliver new messages only to the **Work Phone**.

   After 60 minutes, it tries to deliver new messages to both phones.

8   In the **Wait … rings before failing the attempt** field, select the number of rings that the system waits for an answer when attempting to deliver the message to the device.

9   In the **If delivery attempt failed, wait … minutes before retrying** field, type the number of minutes the messaging system waits after an unsuccessful message delivery attempt before retrying the message delivery

   NOTE An attempt is considered unsuccessful when the delivery number is busy, unanswered, answered by a person who does not enter a personal ID, or answered by an answering machine.

10 In the **Maximum retries** field, type the maximum number of unsuccessful delivery attempts to this device before the messaging system stops trying this number. To configure no limit, type 99.

11 Click 💾 **Save** in the Title Bar.

12 Repeat these steps for each device that receives message notification.

Configure Subscriber Live Record Settings

Live record enables subscribers to record phone conversations and is available with certain DTMF phone system integrations and ViewMail®.

ViewMail® is a set of applications that enables users to view and manage voice and e‑mail messages on their desktop, which can be run as a stand‑alone application or integrated with one of the supported e‑mail systems.

A subscriber can save the recording for later reference or redirect it to another subscriber or group of subscribers.

CAUTION The use of monitoring, recording or listening devices to eavesdrop, monitor, retrieve or record phone conversations or other sound activities, whether or not contemporaneous with transmission, can be illegal in certain circumstances under federal or state laws.

Legal advice should be sought prior to implementing any practice that monitors or records any phone conversation.

Some federal and state laws require some form of notification to all parties to a phone conversation, such as using a beep tone or other notification methods or requiring the consent of all parties to the phone conversation, prior to monitoring or recording the phone conversation.

Some of these laws incorporate strict penalties.

Using Live Record without ViewMail®

If DTMF live record is used without ViewMail®, the phone system administrator programs the phone system to enable live record on the phones. Subscribers start a live record session using a programmed button on the phone and stop recording by hanging up or pressing any touch tone key. The recording is saved in the subscriber voice mailbox.

Using Live Record with ViewMail®

When ViewMail® is installed, subscribers have additional settings for managing live record sessions. System managers enable or disable live record for each subscriber, specifying the maximum length of a recording and the extensions an individual subscriber can use for live record. If a subscriber can record at more than one extension, the list of extensions appears in a list box when the subscriber starts a live record session.

To configure live record:

1 In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Live Record**.

2 Find a subscriber using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Live Record** page for the selected subscriber is displayed.

3 Select **Enable live record** to enable call recording for subscriber.

4 In the **Maximum record time ... seconds** field, type the maximum recording time, in seconds. The maximum is 6000 seconds.

5 In the **Live Record Extensions for ViewMail** section, select one of the following to specify which extensions the subscriber can use for live record:

- **On subscriber's extension.** Subscribers record calls on their own extensions.
- **On extensions.** Specify a different extension range of extensions, the subscriber can use to record calls.

  For example: 201-211

  NOTE This feature is available only with ViewMail.

6   When live record is initiated from a redirected extension, the system sends the recorded conversation to the mailbox of the called extension.

7   Select **Save Live Record message in inbox** to enable saving the live record messages in the subscriber's inbox. When not selected the live record message must be addressed to another subscriber at the time of the recording.

8   Click 🖫 **Save** in the Title Bar.

Configure Subscriber Fax

Configure a subscriber's fax mail settings to accommodate individual preferences. Configure fax delivery to a specific fax machine, record a fax introduction and/or fax greeting, permit voice annotation, and configure One‑Key Dialing rules for each subscriber.

> **NOTE** Fax is available with the messaging system that has the **Fax** feature licensed.

Configure Fax Message Delivery

Default fax mail delivery settings may include:

- Deliver faxes immediately without notifying subscribers.

- Notify subscribers that fax mail has been received, but leave the faxes in the fax box until the subscriber requests delivery.

- Announce new faxes, even if the caller did not leave a voice annotation.

- Callers can leave a voice annotation with a fax and edit or review this annotation before sending the fax.

To customize subscriber fax settings:

1   In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Fax**.

2   Find a subscriber using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Fax** page for the selected subscriber is displayed.

3   In the **Fax ID** field, type an ID. Callers dial this number to send faxes directly to the subscriber.

4   In the **Fax intro** field, click the timestamp icon to record a fax introduction.

> **NOTE** This field appears only if the subscriber has a Fax ID. Callers hear this recording before the messaging system transfers the call to an available fax port.

5   In the **No fax available** section, select a routing method that specifies how the messaging system handles the call when all fax ports are busy:

- **Take a message.** Records a message for the owner of the voice mailbox.

- **Route to operator.** Routes the caller to the system operator box.

- **Route to.** Routes the call to another system ID. Type a system ID or click **Search** to find and select a system ID.

- **Hang up.** Disconnects the call without saying good‑bye.

- **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good‑bye and disconnects.

- **Restart.** Returns the call to the opening greeting box.

- **Hold.** Callers can hold for a fax port. Voice detect call holding is not available.

6   In the **After taking a message or holding** section, select an action the messaging system takes after placing the caller on hold and the caller leaves a voice message or decides not to remain on hold any longer:

> **NOTE** Configure these settings only if the **No fax available** action is set to **Take a message** or **Hold**.

- **Route to operator.** Routes the caller to the system operator box.

- **Route to.** Routes the call to another system ID. Type a system ID or click **Search** to find and select a system ID.

- **Hang up.** Disconnects the call without saying good‑bye.

- **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses for caller to make a selection, if there is no response, says good‑bye and disconnects.

- **Restart.** Returns the call to the opening greeting box.

7   In **Fax greeting**, click the timestamp icon to record a fax greeting for the subscriber's voice mailbox. The greeting should include instructions for any **One‑Key Dialing** rules.

> **NOTE** This field appears only if the subscriber has a Fax ID.

8   In the **Voice annotation** section, configure the settings that determine how the messaging system asks callers to leave a voice message with a fax.

   a   In the **Maximum message length to record from an unidentified caller… seconds** field, type the maximum length (up to 9999) allowed for an unidentified caller voice annotation, in seconds.

   b   Select **Ask for a voice annotation** to set the system to ask unidentified callers to record a voice annotation.

   c   Select **Allow edits to voice annotation** if you want to allow callers to edit or re-record the voice annotation.

   > **NOTE** This option is available only when **Ask for a voice annotation** is selected.

   d   Select **Notify subscriber even if there is no voice annotation** to send a subscriber notification when a new fax message arrives, even when there is no voice annotation.

9   In the **One Key dialing** section, in fields **1** through **0**, configure the one‑key dialing rules for the fax box. A maximum of 10 keys can be configured.

10 In the **One‑key delay ... seconds** field, set the number of seconds that the system pauses and waits for a caller to enter additional keys.

11 Click 🖫 **Save** in the Title Bar.

Configure Subscriber E‑mail Settings

The e‑mail integration enables subscribers to use Text‑To‑Speech technology and a phone to listen their e‑mail messages. The new message count can include e‑mail messages, all voice messages and incoming faxes can be automatically forwarded to their e‑mail inbox.

> **NOTE** The e‑mail integration requires that Text-To-Speech languages must be licensed and installed to use the **E-mail reader** feature. You must also configure the subscriber's **Access Options** for Mailbox Manager and e‑mail.

Configure Subscriber's E-mail

To configure e-mail integration:

1 In the Navigation Pane, go to **Subscribers** > **Subscribers** > **E-mail**.

2 Find a subscriber using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **E-mail** page for the selected subscriber is displayed.

3 In the **E-mail address** field from the **E-mail notification** section, type the subscriber's e‑mail address. Voice and fax messages are forwarded to this e‑mail address.

> **NOTE** You may add multiple email addresses. Use a space to separate the addresses.

4 In the **E-mail reader (text-to-speech)** section, configure the options as follows:

a From the **Server type** list, select the e‑mail protocol used by the e‑mail server. Supported e‑mail protocols are **IMAP** and **POP3**.

- IMAP uses port 143.
- POP3 uses port 110.

b From the **Authentication Method** list, select the authentication type used by the e‑mail server for outgoing e-mail.

c In the **Server name** field, type the server name or IP address of the e‑mail server.

d In the **User name** field, type the e‑mail name or the ID of a subscriber who can listen to e‑mail messages using the messaging system.

> For example:
>
> If the subscriber's e‑mail address is **ssimmons@mycompany.com**, the e‑mail **User name** is **ssimmons**.

> **e** In the **Port** field, type the port number for the SMTP or IMAP e‑mail server.
>
> **f** Select **Use SSL** to enable SSL secure transport protocol. The port number changes to 993.

5 Click ![save icon] **Save** in the Title Bar.

Configure Subscriber's E-mail for Transcription

Transcription is a service that converts messages from audio format to text format. It allows delivery of voice mail messages when listening to audio messages would be either a challenge or prohibited. Once a message is transcribed, it can be forwarded as an email.

The voice message server doesn't perform the transcription, instead it forwards the audio message via e-mail to a server or client that provides transcription services.

To configure e-mail for transcription, refer to the document named *Mutare giSTT Transcription Configuration Guide* from the Installation Media.

Managing Subscriber Guests

A guest is a person who is hosted by a subscriber. A guest is given a guest mailbox and allowed to trade two‑way messages only with the subscriber host. A guest can be a member of the subscriber's private message groups, but cannot be a member of open message groups.

When a subscriber guest is created, the guest is assigned to their host subscriber. Then the host subscriber provides a personalized messaging system experience for clients, contacts, friends, or family. These callers are enrolled on the system as guests of the subscriber and are greeted by name and have direct access to exchange messages with their host.

Guests are limited to leaving messages for their host. If a guest wants to leave a message for another subscriber or try a different extension, the guest must dial the external number.

NOTE Subscriber guests may not have a physical extension in the phone system.

Guest messages can be deleted without removing the guest from the messaging system. However, when a guest is removed all messages owned by the guest are automatically deleted.

Add/Remove a Guest

To add a guest:

1   In the Navigation Pane, go to **Subscribers** > **Guests** > **Profile**.

2   In the Title Bar, click the ⊕ **Add** icon. The **Add Guest** box displays.

3   In the **Add Guest** box, configure the following options:

   a   Fill in the **Last name** and **First and middle name**.

   b   Fill a **Personal ID** for the guest.

   c   From the **Guest of** list, select the host subscriber for the guest.

   d   Click **Add**. The guest information you just created is loaded in the Web Administration Console page.

   e   To add more guests, repeat these steps.

   f   Click **Done** when finished.

4 In the **Profile** page, confirm that the information you just provided is displayed correctly.

You can change the **Last name**, **First and middle name**, and **Personal ID** of the guest on this page, but not the host subscriber.

5 In the **Voice name** field, click the timestamp icon to record the voice name of the guest.

6 In the **Language** list, select the language for the guest to use.

7 The **New messages** field displays the number and length of the guest's new messages.

8 The **Total messages** field displays the number and length of the guest's new, old, and archived messages.

9 Click the **Delete Messages** button to delete all messages from the guest box, both heard and unheard.

10 Select **Allow callers to leave urgent messages** to enable the option for the guest to mark messages as urgent.

11 Select **Mark all messages urgent** to have all messages from the guest to be marked automatically as urgent.

12 Click 🖫 **Save** in the Title Bar.

To remove a guest:

1 In the Navigation Pane, go to **Subscribers** > **Guests > Profile**.

2 Find a guest using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Profile** page for the selected guest is displayed.

3 In the Title Bar, click the ⊖ **Delete** icon to remove the selected guest from the messaging system.

4 Click **OK** to confirm.

To delete a guest's messages:

1 In the Navigation Pane, go to **Subscribers** > **Guests**.

2 Find a guest using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Profile** page for the selected guest is displayed.

3 Click the **Delete Messages** button to delete all messages from the selected guest box, both heard and unheard.

4 Click **OK** to confirm.

Configure Guest Message Notification

Guest notifications must be configured by the system manager. System managers use this page to configure guest notifications.

To configure a guest message notification:

1   In the Navigation Pane, go to **Subscribers** > **Guests** > **Notification**.

2   Find a guest using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Profile** page for the selected guest is displayed.

3   From the device list, select a device to receive message notification. Valid devices include **Work phone**, **Home phone**, **Pager phone**, and **Spare phone**.

4   Select **Enable** to turn on notification for the selected device. When the checkbox is selected, the remaining fields get activated.

5   In the **At extension** field, specify the extension or phone number to dial.

6   In the **Wait ... minutes before the first delivery attempt** field, specify the number of minutes the messaging system waits before the first delivery attempt.

> **NOTE** This feature becomes is available only when the **Delivery method** is set as **Batch** as described in **Step 8**.

Use this setting to assign priorities to each message delivery phone number.

> **For example:**
>
> If you type **0** (zero) for **Work Phone** and **60** for **Home Phone**, the messaging system tries to deliver new messages only to the **Work Phone** during the first 60 minutes.
>
> After 60 minutes, it tries to deliver new messages to both phones.

7   In the **Schedule** section, select hours and days when the device specified in **Step 3** should be used for message delivery.

   • In the **from** and **to** fields, select start and stop time for message delivery.

   • Select the checkboxes for the days for message delivery.

8   In **Delivery method**, select from **Each**, **Urgent**, or **Batch** as follows:

   • **Each.** Starts message delivery as soon as each new message arrives and repeats delivery each time a new message arrives. Delivery delay is not available with this method.

   • **Urgent.** Starts message delivery only when a new urgent message arrives and repeats delivery each time a new urgent message arrives. Delivery delay is not available with this method.

   • **Batch.** When a new message arrives, the messaging system waits the specified delivery interval before making an attempt to notify the subscriber. With this method, the system delivers messages no more frequently than the scheduled interval.

   > **NOTE** Batch notifications include all messages received during the interval between delivery attempts.

9 In the **Wait … rings before failing the attempt** field, select the number of rings that the system waits for an answer when attempting to deliver the message to the device.

10 In the **If delivery attempt failed, wait … minutes before retrying** field, type the number of minutes the messaging system waits after an unsuccessful message delivery attempt before retrying the message delivery

> **NOTE** An attempt is considered unsuccessful when the delivery number is busy, unanswered, answered by a person who does not enter a personal ID, or answered by an answering machine.

11 Click 🖫 **Save** in the Title Bar.

12 Repeat these steps for additional devices.

Configuring Subscriber Templates

Subscriber templates include a set of pre-configured values that can be selected and applied when new subscribers and guests are added to the messaging system. Different templates can be applied to different subscribers according to their roles, needs, and system privileges.

The appropriate use of multiple templates will help you avoid having to configure the same options over and over again for each subscriber or guest you add.

You can also configure the Call Transfer and Call Screening options for guests that are different from the subscribers.

For example:

Create two templates as follows:

(1) **Subscriber Template** with settings that would only be valid to employees.

(2) **Hotel Guest Template** with settings that would be applicable to guests. If you want to block any outside callers from transferring to hotel guest rooms through automatic attendant, create this template with automated attendant settings that prohibit calls from being transferred directly to hotel guest rooms.

Then, assign the template as needed as follows:

• When adding a new subscriber to the messaging system, select **Subscriber Template** from the **Template** option.

• When adding a new hotel guest, select **Hotel Guest Template** from the **Template** option.

CAUTION When changes are made on a **Subscriber Template** page, the same settings must be manually updated for all existing subscribers.

Create Subscriber Templates

To create a subscriber profile template:

1   In the Navigation Pane, go to **Subscribers** > **Templates** > **Profile**.

2   In the Title Bar, click the ⊕ **Add** icon. The **Add Template** page displays.
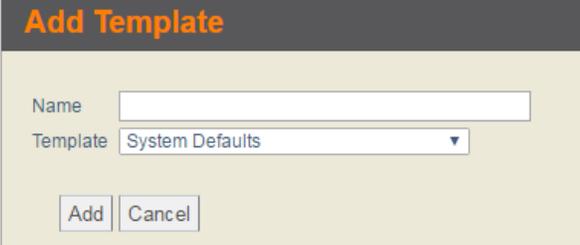
3   In the **Add Template** page, configure the following options:

    a   In the **Name** field, provide the **Name** for the new subscriber template.

    b   From the **Template** list, select a template to use as the base template for your new template. The settings configured for the base template you selected will be populated into the new template you are creating.

    c   Click **Add**. The template **Profile** page displays with the template name you just created.

    d   Click **Cancel** or **Done** to close the **Add Template** page.

4   The **Profile** page of the template you just created in displayed.

5   Confirm that the template name is correctly displayed in the **Name** field.

6   From the **Language** list, select a language the caller will hear if multiple languages are licensed and installed on the messaging system.

7   From the **Presence Integration** list, select a presence engine. Refer to the Configure Presence Integration section.

8   In **Time Zone**, select the time zone for the template, so the messages and schedules indicate proper time according to the location the subscriber resides in.

> **NOTE** Choosing the option **Default** will follow the system's time zone.

9   Use the **Custom field 1** and **Custom field 2** boxes to assign tags or notes that will be used in the automatic selection of recipients for scheduled messages.

10   Click 🖫 **Save** in the Title Bar.

Edit/Change the Access Options Template

Access options control subscriber access to system features. The access options determine how the subscriber interacts with the messaging system. The settings can be changed for individual subscribers on the subscriber access options page.

To change the access options template:

1   In the Navigation Pane, go to **Subscribers** > **Templates** > **Access Options**.

2   Find a subscriber template using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Access Options** page for the selected subscriber template is displayed.

3   Select or clear the access settings.

    For more details about each Access Option, refer to Appendix A – Configuration Options.

4   Click 🖫 **Save** in the Title Bar.

Configure the Call Transfer Settings Template

The **Call Transfer** feature puts a call on hold, and then dials the extension. The messaging system can be configured to allow multiple callers to hold for a busy extension. There are three different types of **Call Transfer**:

- **Release**. The messaging system completes the transfer without checking whether the call is answered or there is a busy signal.

- **Await answer.** The system waits for the extension to be answered before connecting the caller to the extension. When the call is transferred, it is supervised and **ring-no-answer** or **busy extensions** are recalled, and then the appropriate action is taken.

- **Wait for ringback.** The messaging system waits for an extension to ring a certain number of times before releasing the call to the phone system.

The most common transfer type is **Release**. The **Await answer** transfer type is required to configure **Call Screening** and **Call Holding**.

The messaging system can be configured to allow multiple callers to hold for a busy extension. **Call Transfer** must be turned on and the transfer type must be set to **Await answer** or **Wait for ringback** to enable call holding.

The **Call Screening** feature screens the call before transferring it to a subscriber and the subscriber accepts the call according to the call holding and screening rules configured in the subscriber template.

To configure the call transfer settings template:

1   In the Navigation Pane, go to **Subscribers** > **Templates > Call Transfer**.

2   For more details about each Call Transfer option, see Call Transfer Options from Appendix A – Configuration Options.

3   Find a subscriber template using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Call Transfer** page for the selected subscriber template is displayed.

4   Select the **Enable call transfer** checkbox to turn on the call transfer feature.

5   Select the **Check for dial tone before transferring** checkbox to enable the messaging system to listen for a dial tone before attempting to transfer a call, and then select one of the following:

- Select **Transfer to subscriber's extension** to transfer calls to the subscriber's extension specified on the Subscriber Profile page.

- Select **Transfer to**, and then type the transfer-to number in the text box, to transfer calls to a number other than the subscriber's extension.

6   From the **Transfer type** list, select from **Release**, **Await answer**, or **Wait for ringback**.

7   If the call transfer type **Await answer** or **Wait for ringback** is selected, then in the **Wait for… rings** field, select a minimum of 3 rings.

8   Select the **Allow holding** checkbox to allow the callers to be able to hold if the line is busy.

> **NOTE** The **Allow holding** and **Use VOX holding** options are not available with the **Release** transfer type.

9   Select the **Use VOX holding** checkbox for voice detect call holding. Callers speak to hold instead of pressing a touch tone key.

10 In the **Transfer/Screening options** section, select one of the following options:

- If you want to enable certain **Call Transfer** options, select the **Use transfer** radio button.
- If you want to enable certain **Call Screening** options, select the **Use screening** radio button.

After selecting one of the options above, select one or more of the following sub-options:

> **NOTE** These options are available only with the **Await Answer** transfer type.

- **Gather phone number.** Ask callers to provide a phone number.
- **Gather account number.** Ask callers to provide their account number. Click the **Use customized prompt for Gather Account Number** timestamp to record a custom prompt.
- **Announce transfer.** Play a beep before connecting the caller. With most phone systems, this lets the subscribers know when the call is connected or that the call is from an external caller.
- **Confirm before transfer.** Ask if the subscriber wants to take the call before the system transfers the call. If the subscriber does not take the call, the system plays the appropriate greeting and takes the action specified in the **After Greeting** section from the **Subscribers** > **Subscribers** > **Greetings** page.
- **Introduce caller.** Play the "Call for <subscriber's name>" prompt before connecting the call. Use this option when more than one subscriber uses the same extension.
- **Record caller's name.** Ask callers to record their name. Before the call is transferred, the subscriber hears the "Call from <caller's name>" prompt.

  If the subscriber rejects the call or is not available, the recorded name is not saved.

- **Record and save caller's name.** Ask callers to record their name. Before the call is transferred, the subscriber hears the "Call from <caller's name>" prompt.

  If the subscriber rejects the call or is not available, and the caller leaves a message, the recorded name plays at the beginning of the message.

  If the caller does not record a message, the subscriber receives the caller's recorded name as the message.

11 In the Title Bar, click the 💾 **Save** icon.

Configure the Greetings Template

The Subscriber Greetings template specifies how the messaging system handles calls when an extension is busy.

To change the greetings template:

1   In the Navigation Pane, go to **Subscribers** > **Templates > Greetings**.

2   Find a subscriber template using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Greetings** page for the selected subscriber template is displayed.

3 In the **When the subscriber's extension is busy** section, select **Enable busy greeting** to activate the greeting that plays when the subscriber's extension is busy.

If the subscriber has no standard greeting recorded and the **Enable busy greeting** field is not selected, callers hear "<recorded name> is on the phone."

4 In the **After greeting** section, select one of the following to specify the action the messaging system takes after playing the greeting:

- **Take a message.** Records a message for the owner of the voice mailbox.
- **Take a message for group.** Records a message for the specified group. If selected, type the name of the group in the textbox in order to receive the messages.

   > **NOTE** Prior to configuring this option, the subscriber and message group must be created first, and then the target message group must be assigned.
   >
   > The name of the group must not exceed ten characters and cannot include any numbers or spaces as this option is to be used for outside caller group messaging.

   > **NOTE** The subscriber to subscriber messaging will override the **Take a message for group** option.

- **Route to operator.** Routes callers to the system operator box.
- **Route to.** Routes callers to another system ID. When selected type a system ID in the field.
- **Hang up.** Disconnects without saying good‑bye.
- **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good‑bye and disconnects.
- **Restart.** Returns callers to the opening greeting box.

5 Click 🖬 **Save** in the Title Bar.

Configure the One‑Key Dialing Template

Use the Subscriber Template **One-key Dialing** page to enable callers to press one key on a touch tone keypad to make a selection.

One-key Dialing quickly routes callers to directory assistance, a subscriber extension, transaction boxes, voice detect boxes, language boxes, or interview boxes.

Specify a delay interval, in seconds, for the system to pause and wait for additional key presses when one-key dialing is used, this enables callers to bypass one-key dialing to enter an extension.

> **NOTE** Only system administrators can program **One‑Key Dialing**. Tell subscribers to change their greetings to match the **One‑Key Dialing** rules in their greetings.

To configure the one-key dialing template:

1   In the Navigation Pane, go to **Subscribers** > **Template** > **One-Key Dialing**.

2   In the Title Bar, click the 🔍 **Search** icon to find and select a template.

Alternatively, use the ⬅ **Previous** and ➡ **Next** icons to browse through the templates.

3   In the One-Key Dialing fields **1** through **0**, type the system IDs assigned or click **Search** to find and select a system ID.

The messaging system listens for one-key dialing entries during the greeting and during the good-bye prompt and routes the call according to the system ID assigned to the one-key setting.

4   In the **One-key delay ... seconds** fields, type *1* or *2*.

This creates a 1- or 2-second pause to wait for additional touch tone key presses. The pause enables callers to bypass one-key dialing.

> **CAUTION** The **one-key delay** gives the caller time to press a key in response to the conversation prompt. Without the delay, the caller is automatically re-routed without having the opportunity to make a selection.

5   Click 💾 **Save** in the Title Bar.

6   In the Navigation Pane, go to **Subscribers** > **Templates > Greetings**.

In the **After greeting action** field, select the appropriate option.

> **NOTE** The subscriber must rerecord the greeting to describe the one-key menu to callers.

7   Click 💾 **Save** in the Title Bar.

Configure the Messages Template

Use the **Subscribers** > **Templates > Messages** page to define rules for unidentified caller messaging. This includes:

- Enabling unidentified callers to edit messages they recorded.

- Specifying the maximum length of the message, if the caller can mark the message as urgent.

- Setting the action messaging system should take after taking the message.

- Configuring the message retention value and the maximum size of the message storage.

- Configuring the maximum number of messages a subscriber can save and the message playback order for new and old messages.

To configure the message handling template:

1   In the Navigation Pane, go to **Subscribers** > **Templates > Messages**.

2   Find a subscriber template using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Messages** page for the selected subscriber template is displayed.

3 In the **Unidentified caller messaging** section, configure the following options as necessary:

a Select **Allow callers to change messages they just recorded** to enable unidentified callers to edit or change their message after recording it.

b In the **Maximum message length to record from an unidentified caller...seconds** field, type the number to limit the maximum message size in seconds.

c Select **Message Auto Copy to** to enable automatic copying of messages to another extension. The original message is not deleted. Click **Search** to select another extension or subscriber.

d **[Optional]** Select **Delete on copy** to delete the original message after it is copied.

e In the **Unidentified caller messages are marked urgent** field, select one of the following to specify the urgent message status:

- **Always.** Automatically marks all messages urgent.
- **Never.** Does not mark messages from unidentified callers urgent, and does not allow the caller to mark a message urgent.
- **As specified by caller.** Allows callers to leave an urgent message for the subscriber.

f In the **After taking a message** field, select one of the actions that you want the system to take after callers finish recording their message:

- **Route to.** Routes callers to another system ID. When selected type a system ID in the field.
- **Route to operator.** Routes callers to the system operator box.
- **Hang up.** Disconnects without saying good‑bye.
- **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good‑bye and disconnects.
- **Restart.** Returns callers to the opening greeting box

4 In the **Message Retention** section, configure the following options as necessary:

- In the **Keep old messages for... days** field, type the number of days the messaging system should retain old messages that have been heard but not archived.

  > **NOTE** If you type 0 (zero), the message is kept until midnight on the day it was first heard. Messages are deleted at midnight on the day they expire.

- In the **Keep archived messages for... days** field, type the number of days the messaging system should retain archived messages.

5 In the **Limit message storage** section, configure the following options as necessary:

> **NOTE** This section specifies the message storage space used, in MB on the messaging system, not the number of messages a subscriber can store.

- Select **Maximum message storage (in MB)**, and then type the maximum size of message storage in megabytes allowed for the messaging system.
- Select **Warn subscriber when the message storage reaches (in MB)** and type the message storage size that triggers notification to the subscriber at log on that the message storage limit has been reached and suggest that messages should be deleted.

6 In the **Limit message quantity** section, configure the following options as necessary:

    a In the **Applies to** field, select which messages are counted in the limits:

- **Voice messages only.** Only count voice messages.
- **All messages.** Count voice, transaction box messages, interview box messages, and fax boxes.

    b Select **Maximum number of messages**, and then type the maximum number of the received messages permitted in the subscriber inbox.

    c Select **Warn subscriber when the number of messages reaches**, and type the number of message limit that triggers to notify the subscriber on log on that the message storage limit has been reached and suggest that messages should be deleted.

    d Select **Include Transaction Box messages in quantity calculations** to count messages left in Transaction Boxes owned by the subscriber in the limit count.

7 In the **New Message Order** field, select one of the following options to set how the messages are displayed:

- **LIFO.** **Last In First Out**: Play most recent message first.
- **FIFO**. **First In First Out**: Play the oldest message first.

8 In the **Old Message Order** field, select **LIFO** or **FIFO** to set how the old messages are displayed.

9 Click 💾 **Save** in the Title Bar.

Configure the Message Indication and Notification Settings Template

The messaging system uses a message waiting indicator light on the phone to tell subscribers when messages are waiting. Other message notifications include a distinctive dial tone, such as a stutter tone, or a message display. The method available depends on the phone system.

The messaging system notifies subscribers that new messages are available using **Message Waiting Indicator** and **Message Notification**.

- **Message Waiting Indication.** A feature on a phone that alerts subscribers when they have messages waiting, such as an indication light, distinctive dial tone, or LCD display.

- **Message Notification.** Message notification can be sent to the subscriber extension or other external phones that the system automatically dials. Each subscriber can be configured with up to five devices for message notification.

To configure the message indication settings template:

1 In the Navigation Pane, go to **Subscribers** > **Templates > Notification**.

2 Find a subscriber template using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Notification** page for the selected subscriber template is displayed.

3 In the **Message indication** section, select **Enable Message Waiting Indication (MWI)** to turn on the message waiting indicator light. Then, select one of the following:

- Select **At subscriber's extension** to use subscriber's extension for message waiting indication.

- Select **At extension** to set a different extension if the subscriber receives messages on a different extension.

> **NOTE** Multiple extensions can be added separated by a comma, space, or semi-colon.
>
> If adding a range of numbers, use a dash between the beginning of the range and the last number in the range.
>
> **For example:**
>
> To include extension **845**, **922**, and **950 through 960**, enter: ***<845;922;950-960>***

> **IMPORTANT** Note the following:
>
> • Do not enable MWI at more than ten (10) extensions. Note that entering a value like <1000-1999> would enable MWI at 999 extensions. This will likely create system performance issues.
>
> • The angle brackets <> are only required when more than one extension is used for MWI. They are not required for a single extension MWI.
>
> • The MWI extension field is limited to 40 characters.

4 Specify the **Current MWI state** as being **Off** (the default) or **On**.

To configure the message notification settings template:

1 In the **Message notification** section, select a device from the dropdown list.

Devices that can receive message notification include: **Work phone**, **Home phone**, **Pager phone**, **Spare phone**, and a **Fax phone**.

> **NOTE** In order to the able to select a **Fax phone**, the fax feature package must be licensed.

2 Select **Enable** to turn on message delivery to the device selected, and configure the sub-options as follows:

> **NOTE** Message notification to a specific device can be temporarily suspended by pressing the `#` key while listening to the notification message.
>
> To stop delivery to the device, clear the **Enable** checkbox.

- Select **At subscriber's extension** to dial the subscribers extension to notify of the new message. Select this option if the device is the subscriber's work phone.

- Select **Other number** and provide the phone number for a different device. The new message notification will be delivered to that device.

3 In the **Schedule** section, select hours and days when the device specified in **Step 2** should be used for message delivery.

- In the **from** and **to** fields, select start and stop time for message delivery.

- Select the checkboxes for the days for message delivery.

> **NOTE** If there is another device configured for the same delivery schedules, the messaging system will deliver the notification to both devices.

4   In **Delivery method**, select from **Each**, **Urgent**, or **Batch** as follows:

- **Each.** Starts message delivery as soon as each new message arrives and repeats delivery each time a new message arrives. Delivery delay is not available with this method.

- **Urgent.** Starts message delivery only when a new urgent message arrives and repeats delivery each time a new urgent message arrives. Delivery delay is not available with this method.

- **Batch.** When a new message arrives, the messaging system waits the specified delivery interval before making an attempt to notify the subscriber. With this method, the system delivers messages no more frequently than the scheduled interval.

> **NOTE** Batch notifications include all messages received during the interval between delivery attempts.

5   If **Batch** is selected from **Step 4**, the **Wait ... minutes before the first delivery attempt** box becomes active.

In the box, type the number of minutes the system waits before delivering a message after it arrives. Use this setting to assign priorities to each message delivery phone number.

> **For example:**
>
> If you type 0 (zero) for **Work Phone** and 60 for **Home Phone**, for the first 60 minutes, the messaging system tries to deliver new messages only to the **Work Phone**.
>
> After 60 minutes, it tries to deliver new messages to both phones.

6   In the **Wait ... rings before failing the attempt** field, select the number of rings that the system waits for an answer when attempting to deliver the message to the device.

7   In the **If delivery attempt failed, wait ... minutes before retrying** field, type the number of minutes the messaging system waits after an unsuccessful message delivery attempt before retrying the message delivery

> **NOTE** An attempt is considered unsuccessful when the delivery number is busy, unanswered, answered by a person who does not enter a personal ID, or answered by an answering machine.

8   In the **Maximum retries** field, type the maximum number of unsuccessful delivery attempts to this device before the messaging system stops trying this number. To configure no limit, type 99.

9   Click 🖫 **Save** in the Title Bar.

10 Repeat these steps for each device that receives message notification.

Configure the Live Record Settings Template

Live record enables subscribers to record phone conversations and is available with certain DTMF phone system integrations and ViewMail® or ViewMail® for Microsoft Messaging. A subscriber can save the recording for later reference or redirect it to another subscriber or group of subscribers.

> **CAUTION** The use of monitoring, recording or listening devices to eavesdrop, monitor, retrieve or record phone conversations or other sound activities, whether or not contemporaneous with transmission, can be illegal in certain circumstances under federal or state laws.
>
> Legal advice should be sought prior to implementing any practice that monitors or records any phone conversation.
>
> Some federal and state laws require some form of notification to all parties to a phone conversation, such as using a beep tone or other notification methods or requiring the consent of all parties to the phone conversation, prior to monitoring or recording the phone conversation.
>
> Some of these laws incorporate strict penalties.

Using Live Record without ViewMail®

If DTMF live record is used without ViewMail®, the phone system administrator programs the phone system to enable live record on the phones. Subscribers start a live record session using a programmed button on the phone and stop recording by hanging up or pressing any touch tone key. The recording is saved in the subscriber voice mailbox.

Using Live Record with ViewMail®

When ViewMail® is installed, subscribers have additional settings for managing live record sessions. System managers enable or disable live record for each subscriber, specifying the maximum length of a recording and the extensions an individual subscriber can use for live record. If a subscriber can record at more than one extension, the list of extensions appears in a list box when the subscriber starts a live record session.

To configure the live record template:

1   In the Navigation Pane, go to **Subscribers** > **Templates > Live Record**.

2   Find a subscriber template using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Live Record** page for the selected subscriber template is displayed.

3   Select **Enable live record** to enable call recording for subscriber.

4   In the **Maximum record time ... seconds** field, type the maximum recording time, in seconds. The maximum is 6000 seconds.

5   In the **Live Record Extensions for ViewMail** section, select one of the following to specify which extensions the subscriber can use for live record:

   • **On subscriber's extension.** Subscriber's record calls on their own extensions.

- **On extensions.** Specify a different extension range of extensions, the subscriber can use to record calls.

  | **For example:** 201‑211

  > **NOTE** This feature is available only with ViewMail.

6   When live record is initiated from a redirected extension, the system sends the recorded conversation to the mailbox of the called extension.

7   Select **Save Live Record message in inbox** to enable saving the live record messages in the subscriber's inbox. When not selected the live record message must be addressed to another subscriber at the time of the recording.

8   Click 🖫 **Save** in the Title Bar.

Configure the Fax Settings Template

Use the Subscriber Template Fax page to configure the options for fax routing, after message or holding routing, voice annotation, and one-key dialing rules.

> **NOTE** Fax is available with the messaging system that has the **Fax** feature licensed.

> **NOTE** Fax boxes cannot be deleted without first removing the subscriber from the system.

To configure the fax settings template:

1   In the Navigation Pane, go to **Subscribers** > **Templates** > **Fax**.

2   Find a subscriber template using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Fax** page for the selected subscriber template is displayed.

3   Select the **Add Fax Boxes** checkbox, if you want to have a Fax box enabled with this template.

> **NOTE** The **Add Fax Boxes** checkbox will be enabled only when there is a **Fax ID** field configured from the **Subscribers** > **Account Policy** page. Refer to the Configuring Subscriber Account Policy chapter.

4   In the **No fax available** section, select a routing method that specifies how the messaging system handles the call when all fax ports are busy:

- **Take a message.** Records a message for the owner of the voice mailbox.

- **Route to operator.** Routes the caller to the system operator box.

- **Route to.** Routes the call to another system ID. Type a system ID or click **Search** to find and select a system ID.

- **Hang up.** Disconnects the call without saying good‑bye.

- **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good‑bye and disconnects.

- **Restart.** Returns the call to the opening greeting box.

- **Hold.** Callers can hold for a fax port. Voice detect call holding is not available.

5   In the **After taking a message or holding** section, select an action the messaging system takes after placing the caller on hold and the caller leaves a voice message or decides not to remain on hold any longer:

> **NOTE** Configure these settings only if the **No fax available** action is set to **Take a message** or **Hold**.

- **Route to operator.** Routes the caller to the system operator box.

- **Route to.** Routes the call to another system ID. Type a system ID or click **Search** to find and select a system ID.

- **Hang up.** Disconnects the call without saying good‑bye.

- **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses for caller to make a selection, if there is no response, says good‑bye and disconnects.

- **Restart.** Returns the call to the opening greeting box.

6   In the **Voice annotation** section, configure the settings that determine how the messaging system asks callers to leave a voice message with a fax.

   a   In the **Maximum message length to record from an unidentified caller… seconds** field, type the maximum length (up to 9999) allowed for an unidentified caller voice annotation, in seconds.

   b   Select **Ask for a voice annotation** to set the system to ask unidentified callers to record a voice annotation.

   c   Select **Allow edits to voice annotation** if you want to allow callers to edit or re-record the voice annotation.

   > **NOTE** This option is available only when **Ask for a voice annotation** is selected.

   d   Select **Notify subscriber even if there is no voice annotation** to send a subscriber notification when a new fax message arrives, even when there is no voice annotation.

7   In the **One Key dialing** section, in fields **1** through **0**, configure the one‑key dialing rules for the fax box. A maximum of 10 keys can be configured.

8   In the **One‑key delay … seconds** field, set the number of seconds that the system pauses and waits for a caller to enter additional keys.

9   Click **Save** in the Title Bar.

Configure E‑mail Settings Template

The e‑mail integration enables subscribers to use **text‑to‑speech** technology and a phone to listen their e‑mail messages. The new message count can include e‑mail messages, all voice messages and incoming faxes can be automatically forwarded to their e‑mail inbox.

NOTE The e‑mail integration requires Text-To-Speech languages must be licensed and installed to use the **E-mail reader** feature. You must also configure the subscriber's **Access Options** for Mailbox Manager and e‑mail.

Use this page to configure the e‑mail notification settings for templates.

To configure e‑mail integration:

1 In the Navigation Pane, go to **Subscribers** > **Templates** > **E-mail**.

2 Find a subscriber template using the 🔍 **Search** icon or ◀ **Previous** & ▶ **Next** icons from the Title Bar. The **E-mail** page for the selected subscriber template is displayed.

3 In the **E-mail reader (text-to-speech)** section, configure the options as follows:

   a From the **Server type** list, select the e‑mail protocol used by the e‑mail server. Supported e‑mail protocols are **IMAP** and **POP3**.

   • IMAP uses port 143.

   • POP3 uses port 110.

   b From the **Authentication Method** list, select the authentication type used by the e‑mail server for outgoing e-mail.

   c In the **Server name** field, type the server name or IP address of the e‑mail server.

   d In the **Port** field, type the port number for the SMTP or IMAP e‑mail server.

   e Select **Use SSL** to enable SSL secure transport protocol. The port number changes to **993**.

4 Click 💾 **Save** in the Title Bar.

Configuring Subscriber Account Policy

Account policies are the default set of rules for subscribers. Specify a convention for Personal ID, Fax ID, password (security code) for each new subscriber, the minimum length of the security code, and for minimal security allow blank passwords.

When a default security code is created the messaging system requires subscribers to create a new code during the enrollment conversation. This precaution ensures that unauthorized persons cannot access unused mailboxes before enrollment and prevents subscribers from enrolling without setting a security code.

NOTES

1. Fax is available with the messaging system that has the **Fax** feature licensed.

2. **ActiveFax** is an optional feature that requires licensing and installation. When many or all subscribers want personal fax boxes, configure a default convention for assigning Fax IDs. The **Fax ID** pattern is automatically applied when new subscribers are added to the messaging system or when a new fax box is added for existing subscribers. When the **Fax ID** field is blank, a fax box is not created when new subscribers are added to the messaging system.

3. The **Fax ID** option works in conjunction with the **Add Fax Box** option configured in the **Subscriber** > **Templates** > **Fax** page. If you remove the existing **Fax ID** value from the **Account Policy** page, the subscribers who already have the **Fax Box** configured will be retained. However, any subscriber templates with the **Add Fax Box** option selected will get disabled.

To configure the default subscriber account policy:

1 In the Navigation Pane, click **Subscribers** > **Account Policy**.

2 In the **Personal ID** field, type a 1- or 2- digit prefix followed by X. The X is replaced with the subscriber's extension number.

> **For example:**
>
> Type 9*X*, where X is the subscriber's extension. The system adds the prefix to the beginning of the subscriber's extension ID. For example, a subscriber with an extension of **123** will have a Personal ID of **9123**.

3 In the **Fax ID** field, type a prefix followed by X.

> **For example:**
>
> Type *8X*, where X is the subscriber's extension. For example, a subscriber with an extension of **123** is assigned a Fax Box ID of **8123**.

NOTE "X" must be an uppercase letter.

NOTE The **Fax ID** field is available only to system with licensed Fax Ports.

4   Do not select **Permit blank password** to require subscribers to set a security code.

5   Select **Minimum number of characters in password** to require a minimum number of characters in a security code.

6   Specify the number of characters required for the password. Maximum length allowed is 10 characters.

7   In the **Default password for each new subscriber** field, set a default password. The default password must be 4 to 10 digits in length. This password is used to access the first-time enrollment conversation.

8   Check the **Prevent Trivial Passwords** checkbox to prevent users from creating passwords with repeating digits, consecutive digits, and similar easily guessed passwords.

9   Click 🖫 **Save** in the Title Bar.

Managing Calls

Use the **Call Management** pages to configure how UM8000 messaging system answers, routes, transfers, and records calls. Follow the steps in the subsequent sections to specify how calls should be handled.

Configure the Extended Automated Attendant

The **Extended Automated Attendant** enables callers to dial extensions when there are no database entities (subscriber mailboxes or transaction boxes) linked to the extension. This significantly reduces the potential database size and increases system responsiveness by decreasing the system resource utilization and system administration.

When the **Extended Automated Attendant** is activated, it acts as an additional database for non‑subscriber extensions. It is referenced only if a caller dials an extension that is not found in the subscriber database. In case of a conflict, the **Extended Automated Attendant** uses the last precedence with the other call management tools, such as transaction boxes or directory groups, and does not interfere with their operations.

> **NOTE** An example of some extensions that utilize the extended automated attendant are a conference room, the lunch room, or other general purpose extension that does not have an associated mailbox or messaging service.

To configure the extended automated attendant:

1 In the Navigation Pane, go to **Call Management** > **Extended Automated Attendant**.

2 Select **Activate automated attendant**.

> **NOTE** You must select this option to be able to configure the rest of the automated attendant options. Otherwise, the options will not be available (inactive).

3 In the **Extension (range)** field, type the extension, extension range, or ranges the extended automated attendant manages.

> **NOTE** Type the values in ascending order, separated by commas. If the numbers are sequential, type a range separated by a hyphen.

4 In the **Transfer type** field, select how the messaging system and the phone system should interact during call transfer from one of the following options:

> **NOTE** All call transfer types put the call on hold and then dial the extension. The most common is the **Release** transfer type.

- **Await Answer.** The system transfers the call to the extension if the call is answered within the number of rings specified in the **Number of rings** field. If the extension is busy or goes unanswered, the system announces that the extension is busy or not answered.

- **Wait for ringback.** The system transfers the call to the extension if a call is answered within the number of rings specified in the **Number of rings** field. If the call is not answered within the specified number of rings, the call is released to the phone system.

- **Release.** The system releases the call after dialing the extension or phone number. If the extension is busy or goes unanswered, the caller can be informed, to transfer the call by using call forward.

5   In the **Number of rings** field, specify the number of times the extension rings before the automated attendant regains control.

- This applies only if the call transfer type is **Await Answer** or **Wait for ringback**.

- Specify a minimum of three rings.

- If the station is set to call forward on no answer, it must be set to forward after two more rings than the number entered in this field.

6   Click 💾 **Save** in the Title Bar.

Configure Opening Boxes

Opening boxes manage how the messaging system routes incoming calls, greets callers, presents caller selections, and takes actions in response to the caller selections.

A default opening box, with a default opening greeting, is included with the messaging system. The default greeting can be changed.

An opening box stores up to three greetings: a **day greeting**, a **night greeting**, and an **alternate greeting**. Only a system manager can record these greetings or switch between them.

Multiple Opening Boxes can be used to differentiate incoming internal and external callers or to provide opening greetings for different primary incoming trunks.

For example:

If you have separate phone numbers for different departments, such as **technical support** and **sales**, you can create an opening box for each of these phone numbers.

Steps for Configuring Opening Boxes

The messaging system provides a default configuration for the opening box. While this configuration enables the messaging system to function immediately, it can be changed to meet the needs of your organization.

1   **Plan the messaging system opening action.**

Decide how callers are greeted and routed. Decide how many opening boxes are needed.

2   **Create required opening boxes.**

See Create an Opening Box.

3   **Configure the general opening box.**

See Edit/Change Opening Box Profiles and Route Callers to a Language Box.

4 **Record greetings.**

See Record Greetings and Configure Actions After Greetings.

5 **Set the action the system takes after playing the greeting.**

See Record Greetings and Configure Actions After Greetings.

6 **Configure one‑key dialing.**

See Route Callers with One‑Key Dialing.

7 **Configure directory assistance.**

See Configure Directory Assistance Settings.

8 **Test the opening boxes.**

Call the system and confirm that the opening boxes are correctly handling the calls.

Create an Opening Box

The messaging system supports multiple opening boxes. Multiple opening boxes are useful if a messaging system is configured to handle multiple incoming phone lines. Opening boxes manage incoming call routing.

To create an opening box:

1 In the Navigation Pane, go to **Call Management** > **Opening Boxes** > **Profile**.

2 In the Title Bar, click the ⊕ **Add** icon. The **Add Opening Boxes** page appears.

3 In the **Add Opening Boxes** page, configure the following options:

a In the **Name Opening Boxes** field, type a name for the new Opening Box you are creating.

b In the **System ID** field, create a unique identifier for the new Opening Box. System IDs can include numbers, letters, or the symbol $ (dollar sign).

c Click **Add**. The new Opening Box is created and the **Profile** page is filled with the information you just provided.

d Click **Done** or **Cancel** to close the **Add Opening Boxes** page.

4 In **Voice name**, click the timestamp button to record the name of the opening box.

5 In the Title Bar, click the 💾 **Save** icon.

6 In the Navigation Pane, go to **Call Management** > **Opening Box** > **Greetings**.

7   Record the following greetings for the new opening box:

- **Day/Night greeting.** Record the Day and Night greetings. When the recording button shows 00:00, a greeting has not been recorded.
- **Alternate greeting.** Record an alternate greeting. This greeting is played when the day or night greeting are not applicable.

8   Configure the **After day greeting** and **After night greeting** actions to specify how a call is handled.

For more details about configuring greetings, refer to the Record Greetings and Configure Actions After Greetings section.

9   Click 💾 **Save** in the Title Bar.

10   In the Navigation Pane, go to **System** > **Switch** > **Switch Extension**.

11   Select an **Open line ID** field, and type the **system ID** created for the new Opening Greeting Box.

> **NOTE** An Opening Box can be assigned to more than one port.

12   Click 💾 **Save** in the Title Bar.

Edit/Change Opening Box Profiles

The opening box profile specifies the opening box name, system ID, and Restart IDs.

To edit the opening box profile:

1   In the Navigation Pane, go to **Call Management** > **Opening Boxes** > **Profile**.

2   In the **Name** field, type an opening box name.

3   In the **System ID** field, type a new system ID for the box.

> **NOTE** If you change the opening box system ID, you must type the new ID in all fields where the existing system ID is referenced.

4   In the **Voice name** field, click the timestamp button to record a voice name.

5   From the **Schedule** list, select the schedule when you want the selected Opening Box to be active to route calls. If you don't see the schedule you are looking for, click the **Search** button to find the schedule.

6   In the **Restart IDs** section, assign a language and **System ID** as follows:

> **NOTE** The **Restart IDs** section controls how the messaging system restarts callers at a **Transaction Box** with recordings in the language selected by the caller.
>
> Use this field only with messaging systems that have **Language Boxes**. If the messaging system uses only one language leave the fields blank.
>
> For more details about Language Boxes and how to configure the boxes, refer to the Route Callers to a Language Box section

a   Language. The language to use for the caller.

b   System ID. The system ID where the caller should be routed to.

> **For example:**
>
> Type *$SPANISH* to route the call to the **$SPANISH** Transaction Box containing the Spanish greeting.

c   Search. Click to find a valid **System ID**.

7   Click 🖫 **Save** in the Title Bar.

Record Greetings and Configure Actions After Greetings

The opening greeting is the first thing a caller hears when calling the messaging system. This greeting can be changed by recording a new greeting.

The timestamp buttons on the **Greetings** page display the duration in minutes and seconds for each greeting. If `00:00` appears on the button, it means there is no recording for the corresponding greeting. When a greeting has not been recorded, the system goes directly to the action specified in the **After night greeting** or **After day greeting.**

If a caller does not press a touch tone key during the opening greeting, the actions defined in the **After night greeting** and **After day greeting** are used.

To record and configure a greeting:

1   In the Navigation Pane, go to **Call Management** > **Opening Boxes** > **Greetings**.

2   In the **Active greeting** section, select a greeting to be used when the messaging system answers calls as follows:

- **Day/Night greeting.** Enables the standard day/night greeting for the selected Opening Greeting Box. Once the greeting has been played, the messaging system takes the action specified in **After day greeting** or **After night greeting**.

  - Click the timestamp button on the left to record a day greeting.

  - Click the timestamp button on the right to record a night greeting.

- **Alternate greeting.** Enables the alternate greeting. When the alternate greeting is enabled, it is used in both day and night modes.

  - Click the timestamp button to record an alternate greeting.

3   In the **After day greeting** section, select an action the messaging system should take after playing the greeting during the day schedule.

- **Route to operator.** Routes the caller to the system operator box.

- **Route to.** Routes the caller to another system ID. If you select this setting, type a valid system ID in the Route to field.

- **Hang up.** Disconnects the call without saying good-bye.

- **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good-bye and disconnects.

- **Restart.** Returns the caller to the opening greeting box.

4   In the **After night greeting** section, select an action the messaging system takes after playing the greeting during the night schedule. (The options are same as in the **After day greeting** section.)

5   Click ⊞ **Save** in the Title Bar.

Route Callers with One‑Key Dialing

One-Key Dialing enables callers to reach a particular location within the messaging system or select a preferred language by pressing a single touch tone key. **One-Key Dialing** is used to route callers from the Opening Greeting Box to Transaction Boxes, Voice Detect Boxes, Language Select Boxes, or Interview Boxes.

To avoid **One-Key Dialing** conflicts with extension IDs, specify a system pause to wait for the caller to press additional touch tone keys.

> **NOTE** Only system administrators can program one‑key dialing, however, they must notify subscribers to change their greetings for one‑key dialing rules selected during a subscriber greeting.

To route callers with one-key dialing:

1   In the Navigation Pane, go to **Call Management** > **Opening Boxes** > **One-Key Dialing**.

2   In the One-Key Dialing key fields **1** through **0**, assign the System IDs where callers are routed.

3   Click **Search** to find a valid **System ID** from the list of existing System IDs.

4   Click ⊞ **Save** in the Title Bar after each key assignment.

5   In the **One‑key delay … seconds** field, type *1* or *2*.

This field creates a 1‑ or 2‑second pause that tells the messaging system to pause and wait for additional key entries.

6   Click ⊞ **Save** in the Title Bar.

7   In the Navigation Pane, go to **Call Management** > **Opening Boxes** > **Greetings**.

8   In the **After day greeting** and **After night greeting** sections, select the action to take when a caller does not press any key.

> **NOTE** Ideally, select the **Route to operator** action to transfer the call to the operator when a caller presses an incorrect key or does not press a key. This setting transfers callers without touch tone phones to the operator.

9   Click the timestamp buttons to re-record the opening greeting message to describe the **One-Key Dialing** choices.

10 Click ⊞ **Save** in the Title Bar.

Route Callers to a Language Box

The **Language Box** enables callers to select a language for the system conversation. Configure an **One‑Key Dialing** option to route callers from the **Opening Box** to the **Language Box**.

> **NOTE** Only system administrators can program **One-Key Dialing**. Notify subscribers to change their greetings when **One-Key Dialing** rules are changed.

> **IMPORTANT** The **Language Boxes** work in conjunction with the **Restart IDs**. **Restart ID** is a code that controls how the messaging system restarts callers at a **Transaction Box** with recordings in the language selected by the caller. Refer to the Configure Restart IDs section for the configuration procedure.

To select a language box:

1   In the Navigation Pane, go to **Call Management** > **Opening Boxes** > **Greetings**.

2   In the **After day greeting** section, select **Route to.**

3   In the **Route to** box, type the **System ID** for the **Language Box** or click **Search** to find a valid **Language Box** from the list of existing boxes.

4   Click 🖫 **Save** in the Title Bar.

5   Repeat these steps for the **After night greeting**.

Configure Restart IDs

If **Language Boxes** are used, it is important to set the correct values for the **Restart ID** fields. These fields specify how the system restarts calls for each language offered. If a **Restart ID** is not specified, a caller might be routed back to a **Language Box** multiple times.

Use any valid system ID for the **Restart ID**, including **System IDs** for a **Transaction Box**, **Interview Box**, **Voice Detect Box**, **Directory Menu** or **Group**, **Automatic Directory Assistance**, or an **Operator**.

To configure a restart ID for a language:

1   Decide where to restart callers. Make sure that you have:

   a   Added a **Transaction Box**, **Interview Box**, or **Voice Detect Box**, and then customized the **Transfer**, **Greeting**, and **Action** pages of the box to route callers.

   b   [Optional] Prevent callers from accessing the restart point directly by using a **$** (dollar sign) character at the beginning of the **System ID**.

   c   Recorded the greeting in the specified language.

2   In the Navigation Pane, go to **Call Management** > **Opening Boxes** > **Profile**.

3   Find an Opening Box using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Profile** page for the selected Opening Box is displayed.

4   In the **Restart IDs** section, configure the following options:

a   From the **Language** list, select a language.

b   In the **System ID** field, type the system ID of the box where the caller should be routed to.

> **For example:**
>
> Type *$SPANISH* to route the call to the **$SPANISH** Transaction Box containing the Spanish greeting.

c   Click 🖫 **Save** in the Title Bar.

d   Repeat these steps for additional languages.

5   In the Navigation Pane, go to **Subscribers** > **Subscribers** > **Call Transfer**.

6   Find a subscriber you want the **Language Box** to be enabled with. The **Call Transfer** page of the selected subscriber is displayed.

7   Identify that **Enable Call Transfer** is selected.

8   In the **Transfer type** field, confirm that **Await Answer** is selected.

> **NOTE** Using the **Await Answer** call transfer type keeps voice ports busy longer than the other transfer types. However, selecting another transfer type causes some callers to be asked to select a language a second time if an extension is not answered.

9   Go back to the Navigation Pane, and go to **Call Management** and select the box you want the caller to restart.

10   Confirm that **Day – transfer to** or **Night – transfer to** option is selected.

11   In the **Transfer type** field, confirm that **Await Answer** is selected.

12   Click 🖫 **Save** in the Title Bar if you made any changes.

Configure Directory Assistance Settings

Dialing settings in the **Opening Box** can be configured to enable callers to select alphabetic (automatic) or numeric directory assistance.

The Directory Assistance settings are functional only when **Numeric Directory Assistance** is configured and that you are not using the **One‑Key Dialing** settings in the **Opening Box**.

For more details on directory assistance, refer to the Understand Directory Assistance sections.

> **NOTE** Only system administrators can program **One‑Key Dialing**. Notify subscribers to change their greetings when **One‑Key Dialing** rules are changed.

To configure the system to offer callers automatic directory assistance:

1   In the Navigation Pane, go to **Call Management** > **Opening Boxes** > **One-Key Dialing**.

2   In the One-Key Dialing field **1**, assign the **System ID** for **alphabetic directory assistance**.

3   Click 🖫 **Save** in the Title Bar.

4   In the One-Key Dialing field **2**, assign the **System ID** for the **main directory menu**.

5 In the **One key delay … seconds** field, type the number of seconds to set how many seconds the messaging system should wait for callers to enter additional digits before acting on the key press.

> **NOTE** This allows callers to enter a complete **System ID** and bypass the **One‑Key Dialing** menu. 1 to 2 seconds is recommended.

6 Click 💾 **Save** in the Title Bar.

7 In the Navigation Pane, go to **Call Management** > **Opening Boxes** > **Greetings**.

8 In the **Active greeting** field, click the timestamp buttons to re-record the opening greeting message to list the new **One-Key Dialing** choices you have just configured.

9 Click 💾 **Save** in the Title Bar.

Configure System Operator Box

The **System Operator Box** is a **Transaction Box** that specifies how the system handles calls to the operator. The system operator box defines the extension, call transfer settings, and greetings for the operator and actions taken if the operator is not available.

When the operator is not available, the default setting is to transfer the call to a public **Interview Box** to gather caller information. The **System Operator Box** plays a greeting only when callers are transferred to, or attempt to reach, the operator and the extension is busy or unanswered.

The default settings for the **System Operator Box** enable the operator extension to handle the greatest number of calls without tying up ports with calls holding for the operator.

Steps for Configuring System Operator Box

Use the following steps to specify how the messaging system handles calls for to the operator.

1 **Configure the operator ID, voice name, and language.**
See Configure the System Operator Box Profile.

2 **Configure call transfer.**
See Configure Call Transfer for System Operator Box.

3 **Configure greetings and actions after greetings.**
See Configure System Operator Box Greetings.

4 **Configure message taking settings.**
See Configure How Messages are Managed for the System Operator Box.

5 **Assign an operator box to a specific port.**
See Assign a System Operator Box to a Port.

Configure the System Operator Box Profile

The operator system ID is the number that callers use to connect to the system operator. Callers can press this extension while listening to the opening greeting or at any time the system is listening for an ID.

The default system ID for the system operator is 0 (zero), and can be changed. The operator system ID does not have to match the operator extension.

CAUTION For SV8300 phone systems some regions do not support zero for the Operator.

To change system operator box settings:

1 In the Navigation Pane, go to **Call Management** > **System Operator Box** > **Profile**.

2 In the **System ID** field, type the new ID value for the **System Operator Box**. The default value is **0**.

> **NOTE** The **System ID** for the **System Operator Box** cannot be **1** or **2** as these values can cause conflict with the **1-for-yes** and **2-for-no** conversation.

3 In the **Voice name** field, click the timestamp button to record a name for the **System Operator Box**.

4 From the **Language** list, select a language from the **Language** list for multilingual messaging systems.

5 In the **Alternate system IDs for special operators on each port** field, specify an alternate system IDs to route port calls to the operator box in the following format:

    <port numbers> = <operator box>

Where <port numbers> is the system ID for the port or range of ports, and <operator box> is the operator box system ID.

> **For example:**
> Entering *2=132 3 -4=135* assigns **Port 2** to use **132**; and **Ports 3** and **4** to use the alternate operator system ID **135**.

> **NOTE** Callers pressing 0 (zero) are routed to a different operator depending on which port answers the call.

> **NOTE** Configure a separate transaction box for each alternate operator. See the Assign a System Operator Box to a Port section.

6 Click 💾 **Save** in the Title Bar.

Delete System Operator Box Messages

It is not possible to delete multiple **System Operator Box** messages all at once. Only subscribers who have access to public message groups can delete public messages associated with the **System Operator Box**.

The messaging system is configured to delete **System Operator Box** messages by specifying the retention period (in days). Use the following procedure to delete messages in the **System Operator Box**.

To delete the messages in system operator box:

1   In the Navigation Pane, click **System** > **Configuration** > **Public Messages**.

2   In the **Keep archived messages for … days** field, type a value. The default value is **2 days**.

The **System Operator Box** messages are deleted after the specified number of days.

3   Click 🖫 **Save** in the Title Bar.

Configure Call Transfer for System Operator Box

After a caller is connected to the **System Operator Box**, the **System Operator Box** takes control of the call and applies the **Transfer‑Greeting‑Action** rules configured for the box. Call transfer settings determine how the phone and messaging system interact during a call transfer.

To configure call transfer in system operation box:

1   In the Navigation Pane, go to **Call Management** > **System Operator Box** > **Call Transfer**.

2   Select the **Day - transfer to** checkbox to transfer operator calls during business hours, and then type the operator extension ID in the box.

> **For example:**
>
> During **Day-time** business hours, turn on **Call Transfer** and enter the operator extension ID.
>
> For **Night-time** hours, turn off **Call Transfer** and record a night greeting explaining that the caller has reached the office after normal business hours.

> **CAUTION** For SV8300 phone systems deselect the **Day-transfer to** checkbox if your region does not support **0** (zero) for the Operator.

3   Select the **Night-transfer to** checkbox to transfer operator calls during night time hours, and then type the system extension ID in the box.

4   From the **Transfer Type** list, select a call transfer type as follows:

> **NOTE** The **Await answer** transfer type must be enabled to be able to configure **Transfer options** settings. Otherwise, the options will not be available.

- **Await Answer.** The system transfers the call to the extension if the call is answered within the number of rings specified in the **Wait for…rings** field. If the subscriber phone is busy or goes unanswered, the system plays the greeting and then takes the after‑greeting action.

- **Wait for ringback.** The system transfers the call to the extension if a call is answered within the number of rings specified in the **Wait for … rings** field. If the call is not answered within the specified number of rings, the call is released to the phone system.

  - **For unanswered calls**, the caller cannot leave a message unless the phone system transfers the call using call forward to personal greeting.

- **For busy calls**, the system plays the greeting, then takes the after‑greeting action.

- **When this transfer type is selected**, some transfer options are unavailable. This call transfer type is not supported with phone systems that use DTMF call progress.

- **Release**. The system releases the call after dialing the extension or phone number. If the subscriber phone is busy or goes unanswered, the caller can leave a message if the phone system is configured to transfer the call using call forward to personal greeting.

> **NOTE** The **Release** transfer type is recommended for the System Operator Box. However, if the operator console does not support unlimited camp‑on calling, use the **Await Answer** transfer type.

5   If the call transfer type **Await answer** or **Wait for ringback** is selected, then in the **Wait for... rings** field, type the number of times the extension rings before the call is transferred.

> **NOTE** This setting must be one less than the number of rings set on the phone system. The number should not be set to less than **3** rings.

> **NOTE** If the number of rings is greater than **0** (zero), then the **Allow holding**, **VOX holding**, and **Transfer Options** are activated.

6   Select the **Allow holding** checkbox to allow the callers to be able to hold if the line is busy.

7   Select the **Use VOX holding** checkbox for voice detect call holding. Callers speak to hold instead of pressing a touch tone key.

8   In the **Transfer options** section, select the option(s) that apply:

> **NOTE** These options are available only when the **Await answer** transfer type is selected and the number of **Wait for ... rings** is greater than **0** (zero).

- **Gather phone number.** Ask callers to provide a phone number.

- **Gather account number.** Ask callers to provide their account number. Click the **Use customized prompt for Gather Account Number** timestamp to record a custom prompt.

- **Announce transfer.** Play a beep before connecting the caller. With most phone systems, this lets the subscribers know when the call is connected or that the call is from an external caller.

- **Confirm before transfer.** Ask if the subscriber wants to take the call before the system transfers the call. If the subscriber does not take the call, the system plays the appropriate greeting and takes the action specified in the **After Greeting** section from the **Greetings** page.

- **Introduce caller.** Play the "Call for <subscriber's name>" prompt before connecting the call. Use this option when more than one subscriber uses the same extension.

- **Record caller's name.** Ask callers to record their name. Before the call is transferred, the subscriber hears the "Call from <caller's name>" prompt.

  If the subscriber rejects the call or is not available, the recorded name is not saved.

- **Record and save caller's name.** Ask callers to record their name. Before the call is transferred, the subscriber hears the "Call from <caller's name>" prompt.

If the subscriber rejects the call or is not available, and the caller leaves a message, the recorded name plays at the beginning of the message.

If the caller does not record a message, the subscriber receives the caller's recorded name as the message.

9 Click the **Intro prompt** timestamp button to record a greeting. If a greeting is not recorded, callers may incorrectly assume that they have been disconnected.

10 Click the **Prompt to gather ID/phone number** timestamp to record a custom recording that is played before the call transfer occurs to collect the caller's ID or phone number.

- If there is a recording in this field, the messaging system plays the recording before routing a caller from outside the messaging system to the destination.

- If there is no recording in this field, the system plays a prompt from the **Gather ID** prompt set.

11 Click 🖫 **Save** in the Title Bar.

Configure System Operator Box Greetings

Use the **System Operator Box** > **Greetings** page to record operator greetings. When a transfer to the operator extension is not successful, the system plays the active greeting and then takes the specified action. By default, the system is configured to route the caller to the **Public Interview Box**.

The **Active greetings** section has the timestamp buttons for recording. When a greeting has not been recorded, the system plays "<Voice name> is not available," and skips to the **After day greeting** or **After night greeting** action configured.

To configure the greetings:

1 In the Navigation Pane, go to **Call Management** > **System Operator Box** > **Greetings**.

2 In the **Active greeting** section, select a greeting to be used when the messaging system answers calls as follows:

- **Day/Night greeting.** Enables the standard day/night greeting. Once the greeting has been played, the messaging system takes the action specified in **After day greeting** or **After night greeting**.

  - Click the timestamp button on left to record a day greeting.

  - Click the timestamp button on the right to record a night greeting.

- **Alternate greeting.** Enables the alternate greeting. When the alternate greeting is enabled, it is used in both day and night modes.

  - Click the timestamp button to record an alternate greeting.

  > **NOTE** When the **Alternate greeting** is active, it is used for both **day** and **night** modes. The day and night greetings are not played.

3 In the **After Day Greeting** or **After night greeting** field, select one of the following options:

- **Take a message.** Record a message for the public message box.

- **Route to the operator.** Route the caller to the system operator box. This setting is not recommended for use with the system operator box.

- **Route to.** Route the call to the specified system ID.

  > **CAUTION** Do not use the system operator box system ID.

- **Hang up.** Disconnect without saying good-bye.

- **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good-bye and disconnects.

- **Restart.** Return the caller to the opening greeting box. This setting is not recommended for use with the system operator box.

4   Click 🖫 **Save** in the Title Bar.

5   Repeat this procedure to configure the night and alternate greetings.

Configure How Messages are Managed for the System Operator Box

Use the **System Operator Box** > **Messages** page to control how the system takes messages for the **System Operator Box**. Through this page, you can set the maximum length of a message, indicate that callers can leave urgent messages, and set the action the system takes after taking a message for the operator box.

After the operator has heard a message, the messages can be manually deleted or left for the system to automatically delete the messages. The automatic delete is configured on the **System** > **Configuration** > **Public Messages** page in the **Keep archived messages** field.

To configure how messages are taken for the system operator box

1   In the Navigation Pane, go to **Call Management** > **System Operator Box** > **Messages**.

2   Select **Allow callers to change messages they just recorded** to enable callers to edit their messages.

3   Select **Allow callers to leave urgent messages** to enable unidentified callers to mark their message as urgent.

4   Select **Mark all messages urgent** to have all **System Operator Box** messages delivered as urgent.

  > **NOTE** This setting is grayed out if **Allow callers to leave urgent messages** is not selected.

5   In the **Maximum message length to record from an unidentified caller ... seconds** field, type the maximum length, in seconds, of messages from an unidentified caller.

6   In the **After taking a message** field, select one of the following options:

  > **NOTE** This setting applies only if the **After day/night greeting** action from the **Greetings** page is selected as **Take a message**. If **Take a message** is not selected, these settings are not available.

- **Route to.** Route the caller to another system ID. Type the system ID or click Search to find and select a system ID.

- **Route to operator.** Route the caller to the system operator box.

- **Hang up.** Disconnect without saying good-bye

- **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good-bye and disconnects.

- **Restart.** Return the caller to the opening greeting box. This setting is not recommended.

7   Click 🖫 **Save** in the Title Bar.

Assign a System Operator Box to a Port

Multiple operators can be created by configuring a transaction box for each port receiving incoming calls. When callers press `0` (zero) during a messaging system conversation, they are routed to a second operator. Multiple operators are used to support systems with two or more languages, systems shared by two or more businesses, or other special applications.

> **For example:**
> Designate **Port 1** to receive all calls that come to the phone number advertised as a Spanish language line. Then assign the system operator box owned by the Spanish speaking operator to **Port 1**.

To assign a system operator box to a port:

1   Add a **Transaction Box** for the second operator, and note the box System ID.

For more details about adding a **Transaction Box**, refer to the Add a Transaction Box section.

2   In the Navigation Pane, go to **Call Management** > **System Operator Box** > **Profile**.

3   In the **Alternate system IDs for special operators on each port** field, type:

<port number>=<system ID>

> **For example:**
> 1-2=131
> **Ports 1** and **Port 2** forward to system ID **131**.

4   Click 🖫 **Save** in the Title Bar.

Configure Transaction Box

Use **Transaction Boxes** to configure special call handling, create menus, or play pre-recorded announcements.

Configure call transfer to a phone number or extension for each **Transaction Boxes**. If the extension is busy or unanswered, the system plays a greeting for the box, then takes the action specified.

Unlike the **Subscriber Directory** page, a **Transaction Box** can handle callers two different ways for:

(1) **Day mode**: Operating mode during normal business hours.
(2) **Night mode**: Operation mode outside of normal business hours.

Multiple **Transaction Boxes** can be created for different purposes:

- Sales inquiries
- Requests for directions to the office
- Different boxes for different languages

The system can answer ports with different opening greetings. Some ports can answer with a greeting for one business or language and the remaining ports for another business or language.

Steps for Configuring Transaction Box

Several processes are required to properly create and configure the transaction boxes.

1 **Add the transaction box.**
  See Add a Transaction Box.

2 **Configure the general transaction box settings.**
  See Configure Transaction Box Profile.

3 **Change call transfer.**
  See Configure Transaction Box Call Transfers.

4 **Record greetings for the transaction boxes.**
  See Configure Transaction Box Greetings and Action After Greetings.

5 **Configure after greeting actions.**
  See Configure Transaction Box Greetings and Action After Greetings.

6 **Configure how messages are taken.**
  See Configure How Messages are Taken for a Transaction Box.

7 **Configure one-key dialing.**
  See Configure Transaction Box One-key Dialing.

8 **Test the messaging system.**
  Call the system and confirm that the system handles calls correctly for each transaction box.

Add a Transaction Box

Decide how many **Transaction Boxes** are needed and how callers will be routed to the boxes.

Before creating a new **Transaction Box**, decide who will own the box and how it will be used. The owner receives messages for the box when the box is configured to take messages. When an owner of a **Transaction Box** is deleted, the box is automatically deleted as well.

> **NOTE** Back up the messaging system software and data before making significant changes to the configuration. See the **Help** under topic, **Backing up and Restoring Messaging System**.

To add a single transaction box:

1   In the Navigation Pane, go to **Call Management** > **Transaction Boxes** > **Profile**.

2   In the Title Bar, click the ⊕ **Add** icon. The **Add Transaction Boxes** page displays.
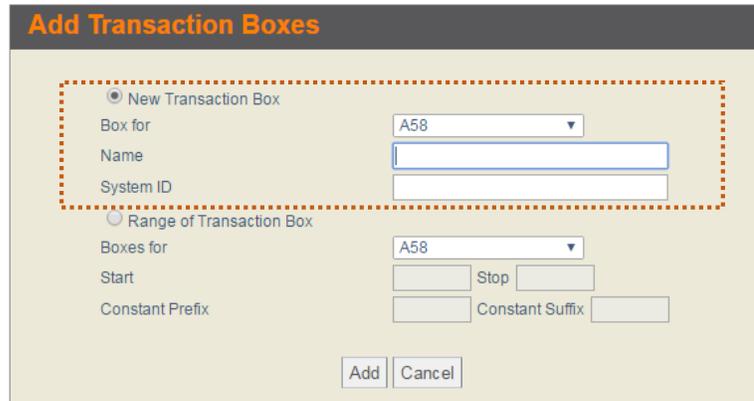
3   In the **Add Transaction Boxes** page, configure the following options:

   a   Select **New Transaction Box**.

   b   From the **Box for** list, select an owner of the new **Transaction Box**.

   c   In the **Name** and **System ID** fields, type the name and the system ID for the new **Transaction Box**.

   > **NOTE** IDs that contain **$** (dollar sign) or other special characters cannot be dialed using a touch tone phone.

   d   Click **Add**.

   e   Click **Done** to close the **Add Transaction Boxes** page.

4   The **Profile** page of the new Transaction Box displays.

To add a range of transaction boxes:

1   In the Navigation Pane, go to **Call Management** > **Transaction Boxes** > **Profile**.

2   In the Title Bar, click the ⊕ **Add** icon. The **Add Transaction Boxes** page displays.

3 In the **Add Transaction Boxes** page, configure the following options:

a Select **Range of Transaction Box**.

b From the **Box for** list, select an owner of the new Transaction Box.

c In the **Start** and **Stop** fields, specify a range of System IDs.

> **NOTE** The **Start** and **Stop** fields must be filled in.

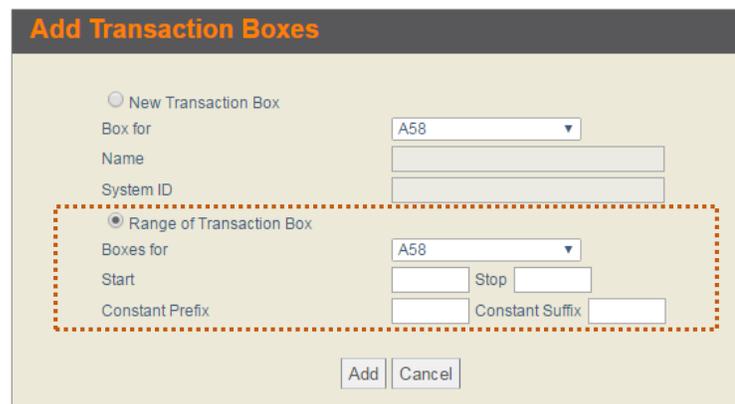**d** **[Optional]** In the **Constant Prefix** and **Constant Suffix** fields, type the digit(s) for System IDs that that begin or end with the specified number.

> **For example:**
>
> To create a range of Transaction Boxes with IDs of the form **85xxx**:
>
> 1. Type *85* in the **Constant Prefix** field.
> 2. Type the 3-digit number in the **Start** field.

e Click **Done** when you are finished adding the range of Transaction Boxes.

4 The **Profile** page of the new Transaction Box range displays.

Configure Transaction Box Profile

After adding a **Transaction Box**, you need to record the name, assign a language, and select a schedule.

To configure the profile page of a transaction box:

1 In the Navigation Pane, go to Call **Management** > **Transaction Boxes** > **Profile**.

2 In the **Name** and **System ID** fields, type a new name and System ID if you want to change values for the selected Transaction Box.

3 Click the **Voice name** timestamp button to record a name.

4 From the **Language** list, select a language that callers will hear when they reach the Transaction Box.

5 From the **Schedule** list, select a schedule. For more details on defining schedule and the options, refer to the **Help** under the topic, **System Schedules**.

> **NOTE** If this field is blank, the box follows the schedule of the port that answers the call.

6 Click 🖫 **Save** in the Title Bar.

Configure Transaction Box Call Transfers

Call transfer settings determine how the phone system and the messaging system interact during a call transfer. In order for call transfer to work properly through **Transaction Boxes**, you must:

- Specify the extension where calls are transferred.
- Select the transfer type.

- Configure the call transfer options.

When call transfer is turned on and the transfer type is set to **Await Answer**, the messaging system tries to transfer a call to the phone or extension listed. When the extension is busy or unanswered, the system plays a greeting and then follows the **After-greeting** action defined on the **Greetings** page.

To configure call transfer for a transaction box:

1 In the Navigation Pane, go to **Call Management** > **Transaction Boxes** > **Call Transfer**.

2 Select one or both of the following:

- Select the **Day-transfer to** checkbox to transfer operator calls during business hours, and then type the operator extension ID in the box.

- Select the **Night-transfer to** checkbox to transfer operator calls outside of business hours, and then type the extension ID in the box.

3 From the **Transfer Type** list, select a call transfer type as follows:

> **NOTE** The **Await answer** transfer type must be enabled to be able to configure **Transfer options** settings. Otherwise, the options will not be available.

- **Await Answer.** The system transfers the call to the extension if the call is answered within the number of rings specified in the **Wait for...rings** field. If the subscriber phone is busy or goes unanswered, the system plays the greeting and then takes the after‑greeting action.

- **Wait for ringback.** The system transfers the call to the extension if a call is answered within the number of rings specified in the **Wait for ... rings** field. If the call is not answered within the specified number of rings, the call is released to the phone system.
  - **For unanswered calls**, the caller cannot leave a message unless the phone system transfers the call using call forward to personal greeting.
  - **For busy calls**, the system plays the greeting, then takes the after‑greeting action.
  - **When this transfer type is selected**, some transfer options are unavailable. This call transfer type is not supported with phone systems that use DTMF call progress.

- **Release**. The system releases the call after dialing the extension or phone number. If the subscriber phone is busy or goes unanswered, the caller can leave a message if the phone system is configured to transfer the call using call forward to personal greeting.

4 If the call transfer type **Await answer** or **Await for ringback** is selected, then in the **Wait for... rings** field, type the number of times the extension rings before the call is transferred.

> **NOTE** This setting must be one less than the number of rings set on the phone system. The number should not be set to less than **3** rings.

> **NOTE** If the number of rings is greater than **0** (zero), then the **Allow holding**, **VOX holding**, and **Transfer Options** are activated.

5 Select the **Allow holding** checkbox to allow the callers to be able to hold if the line is busy.

6   **[Optional]** Select the **Use VOX holding** checkbox for voice detect call holding. Callers speak to hold instead of pressing a touch tone key.

7   In the **Transfer options** section, select the option(s) that apply:

> **NOTE** These options are available only when the **Await answer** transfer type is selected and the number of **Wait for ... rings** is greater than **0** (zero).

- **Gather phone number.** Ask callers to provide a phone number.

- **Gather account number.** Ask callers to provide their account number. Click the **Use customized prompt for Gather Account Number** timestamp to record a custom prompt.

- **Announce transfer.** Play a beep before connecting the caller. With most phone systems, this lets the subscribers know when the call is connected or that the call is from an external caller.

- **Confirm before transfer.** Ask if the subscriber wants to take the call before the system transfers the call. If the subscriber does not take the call, the system plays the appropriate greeting and takes the action specified in the **After Greeting** section from the **Greetings** page.

- **Introduce caller.** Play the "Call for <subscriber's name>" prompt before connecting the call. Use this option when more than one subscriber uses the same extension.

- **Record caller's name.** Ask callers to record their name. Before the call is transferred, the subscriber hears the "Call from <caller's name>" prompt.

  If the subscriber rejects the call or is not available, the recorded name is not saved.

- **Record and save caller's name.** Ask callers to record their name. Before the call is transferred, the subscriber hears the "Call from <caller's name>" prompt.

  If the subscriber rejects the call or is not available, and the caller leaves a message, the recorded name plays at the beginning of the message.

  If the caller does not record a message, the subscriber receives the caller's recorded name as the message.

8   Click the **Intro prompt** timestamp button to record a greeting. If a greeting is not recorded, callers may incorrectly assume that they have been disconnected.

9   Click the **Prompt to gather ID/phone number** timestamp to record a custom recording that is played before the call transfer occurs to collect the caller's ID or phone number.

- If there is a recording in this field, the messaging system plays the recording before routing a caller from outside the messaging system to the destination.

- If there is no recording in this field, the system plays a prompt from the **Gather ID** prompt set.

10 Click 🖫 **Save** in the Title Bar.

Configure Transaction Box Greetings and Action After Greetings

Transaction Box Greetings are recorded and stored on the **Greetings** page. When call transfer is turned off or the extension is busy or unanswered, the system plays the active greeting. The system then takes the **After-greeting** action defined on the **Greetings** page.

When a caller does not press any touch tone keys during the greeting, the messaging system takes the **After-greeting** action defined on the **Greetings** page.

> **NOTE** The owner of the **Transaction Box** can change greetings using a phone. See Record Greetings Using a Phone.

To configure greetings options:

1   In the Navigation Pane, go to **Call Management** > **Transaction Boxes** > **Greetings**.

2   In the **Active greeting** section, select a greeting to be used when the messaging system answers calls as follows:

- **Day/Night greeting.** Enables the standard day/night greeting. Once the greeting has been played, the messaging system takes the action specified in **After day greeting** or **After night greeting**.

  - Click the timestamp button on left to record a day greeting.

  - Click the timestamp button on the right to record a night greeting.

- **Alternate greeting.** Enables the alternate greeting. When the alternate greeting is enabled, it is used in both day and night modes.

  - Click the timestamp button to record an alternate greeting.

  > **NOTE** When the **Alternate greeting** is active, it is used for both **day** and **night** modes. The day and night greetings are not played.

3   In the **After Day Greeting** or **After night greeting** field, select one of the following options:

- **Take a message.** Record a message for the owner of the box.

- **Take a message for group.** Record a message for the members of a message group. Type the name of the group or click **Search** to find and select a group.

  > **NOTE** The name of the group may not exceed ten characters or include numbers or spaces.

- **Route to the operator.** Route the caller to the System Operator Box.

- **Route to.** Route the call to the specified system ID.

- **Hang up.** Disconnect without saying good-bye.

- **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good-bye and disconnects.

- **Restart.** Return the caller to the opening greeting box. This setting is not recommended for use with the system operator box.

4   Click ⊞ **Save** in the Title Bar.

5   Repeat this procedure to configure the night and alternate greetings.

Record Greetings Using a Phone

Only the **Transaction Box** owners can use a phone to change greetings when the **Transaction Box** system ID does not contain a **$** (dollar sign) or other symbol not found on the touch tone phone keypad.

To record transaction box greetings using a phone:

1   Call the system and enter the personal ID and security code of the Transaction Box owner.

2   Press 5 to leave a message.

3   Spell the first three letters of the box name or enter the system ID. The system states which greeting is active.

4   Follow the system conversation prompts to record the standard day and night greetings, an alternate greeting, or to switch between the standard and alternate greetings.

Configure How Messages are Taken for a Transaction Box

Configure how messages are taken for transaction boxes on the **Messages** page. This includes setting the maximum length of a message, if callers can leave urgent messages, and the action the system takes after taking a message.

Specify the action the system takes after recording the message. If the system is set to take a message, specify whether callers can edit their messages or mark messages urgent.

To configure how messages are taken for a transaction box:

1   In the Navigation Pane, go to **Call Management** > **Transaction Boxes** > **Messages**.

2   Select **Allow callers to change messages they just recorded** to enable callers to edit their messages.

3   Select **Allow callers to leave urgent messages** to enable unidentified callers to mark their message as urgent.

4   Select **Mark all messages urgent** to have all **System Operator Box** messages delivered as urgent.

> **NOTE** This setting is grayed out if **Allow callers to leave urgent messages** is not selected.

5   In the **Maximum message length to record from an unidentified caller ... seconds** field, type the maximum length, in seconds, of messages from an unidentified caller.

6   In the **After taking a message** field, select one of the following options:

> **NOTE** This setting applies only if the **After day/night greeting** action from the **Greetings** page is selected as **Take a message**. If **Take a message** is not selected, these settings are not available.

- **Route to.** Route the caller to another system ID. Type the system ID or click Search to find and select a system ID.

- **Route to operator.** Route the caller to the system operator box.

- **Hang up.** Disconnect without saying good-bye

- **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good-bye and disconnects.

- **Restart.** Return the caller to the opening greeting box. This setting is not recommended.

7 Click 💾 **Save** in the Title Bar.

Configure Transaction Box One-key Dialing

Use the **Transaction Boxes** > **One-key Dialing** page to offer callers a menu of choices. **One-key Dialing** enables callers to use a single touch tone key (from 0 to 9) to select a menu item.

Set any system IDs where callers can be routed when they press a single touch tone key.

To enable callers to bypass **one-key dialing**, set the system to pause a certain number of seconds for additional touch tones before routing the call according to the **one-key dialing** menu. These pauses allow callers to press full system IDs to bypass **one-key dialing** during a greeting.

Use the **One-key delay** field to specify how long the system waits between touch tone signals.

> **NOTE** Only system administrators can program **One-key Dialing**. However, subscribers must change their greetings when **One-key Dialing** rules are changed.

To configure one-key dialing for a transaction box:

1 In the Navigation Pane, go to **Call Management** > **Transaction Boxes** > **One-Key Dialing**.

2 In the One-Key Dialing key fields **1** through **0**, assign the System IDs where callers are routed.

3 Click **Search** to find a valid **System ID** from the list of existing System IDs.

4 Click 💾 **Save** in the Title Bar after each key assignment.

5 In the **One‑key delay ... seconds** field, type *1* or *2*.

   This field creates a 1‑ or 2‑second pause that tells the messaging system to pause and wait for additional key entries.

6 Click 💾 **Save** in the Title Bar.

7 In the Navigation Pane, go to **Call Management** > **Transaction Boxes** > **Greetings**.

8 In the **After day greeting** and **After night greeting** sections, select the action to take when a caller does not press any key.

9 Click the timestamp buttons to re-record the opening greeting message to describe the **One-Key Dialing** choices.

10 Click 💾 **Save** in the Title Bar.

Delete a Transaction Box or Messages

Delete all references to a transaction box system ID when deleting a transaction box. Any messages currently stored in the transaction box are automatically deleted when the transaction box is deleted.

> **NOTE** System defined **Transaction Boxes** cannot be deleted.

To delete a transaction box:

1   In the Navigation Pane, go to **Call Management** > **Transaction Boxes** > **Profile**.

2   Find a Transaction Box to delete using the **Search** icon or **Previous** & **Next** icons from the Title Bar. The **Profile** page for the selected Transaction Box is displayed.

3   In the Title Bar, click the **Delete** icon to delete the Transaction Box.

4   Click **OK** to confirm.

To deleting transaction box messages:

1   In the Navigation Pane, go to Call **Management** > **Transaction Boxes** > **Profile**.

2   Find a Transaction Box to delete using the **Search** icon or **Previous** & **Next** icons from the Title Bar. The **Profile** page for the selected Transaction Box is displayed.

3   Click **Delete Messages**.

4   Click **OK** to confirm.

Configure Interview Boxes

Interview Boxes provide information or collect information from callers. An **Interview Box** can contain up to 20 questions or announcements. Each **Interview Box** has an owner, a name, and a unique system ID. When the interview box owner is removed from the system, the interview box is automatically deleted.

When collecting information from callers, configure the **Interview Box** to record caller responses. A beep after the question prompts callers to respond. When the **Interview Box** owner retrieves the messages, the owner hears the replies with a beep separating the responses.

Public Interview Box

The messaging system also has a **Public Interview Box**, a special interview box that is used to handle operator calls that are not answered. The **Public Interview Box** asks for the caller's name, phone number, and a brief message.

- **Public Interview Box Usage**

  Using the **Public Interview Box** is not restricted to operator calls that are not answered. **Public Interview Box** can be used to collect information for a company survey, collect caller information

for a department, and so on. The messaging system can have only one **Public Interview Box** that cannot be deleted.

- **Public Interview Box Messages**

  Messages left in the **Public Interview Box** are public messages. All subscribers with public message access can listen to public interview box messages. There should be at least one subscriber that has access to these public messages to guarantee that the messages are received in a timely manner.

- **Public Interview Box System ID**

  The **Public Interview Box** has a special system ID, **$PM**, that cannot be dialed using a phone. This ID can be changed. However, all references to this system ID must be updated if the system ID is changed. This system ID is usually referenced in **Opening Boxes** or **System Operator Boxes**.

- **Message Notification for Public Messages**

  Subscribers who have access to public messages might not want the have their message waiting lamp lit when the only new messages are public messages. Edit the subscriber access options to clear notifications for public messages.

Steps for Configuring Interview Box

1   **Plan the interview.**

    See Plan an Interview.

2   **Create the interview box.**

    See Add an Interview Box.

3   **Record the interview questions.**

    See Record Interview Box Questions.

4   **Configure how messages are taken.**

    See Configure How Messages are Taken for an Interview Box.

5   **Test the interview.**

    Call the system and confirm that the system handles the call correctly.

Plan an Interview

Think about the information that is to be collected from the caller. Write the questions before creating an **Interview Box**. Determine the maximum length, in seconds, of the response for each question.

Decide how callers are routed to the interview box:

- Use the **After-greeting action** from **Transaction Box**.

- **One-key Dialing** from a **Transaction Box** to the interview box.

- Dialing the system ID for the **Interview Box** during the opening greeting.

If this method is used, make sure that the **Interview Box** system ID can be dialed using a touch tone keypad.

Interview Box Messages

Only the owner of an **Interview Box** can access the interview box messages. Use a **Public Interview Box**, or **Group Messaging** to enable other users to access interview box messages.

When group messaging has been configured, messages to an interview box are automatically sent to all members in the specified group.

The public interview box is an interview box with messages available to all subscribers with public message access. Make sure that at least one subscriber has access to these messages.

Add an Interview Box

To add an interview box:

1   In the Navigation Pane, go to **Call Management** > **Interview Boxes** > **Profile**.

2   In the Title Bar, click the ⊕ **Add** icon. The **Add Interview Box** page displays.

3   In the **Add Interview Boxes** page, configure the following options:

   a   In the **Name** and System ID fields, type the appropriate values for the interview box.

   b   From the **Box for** list, select an owner of the box.

   c   Click **Add**.

   d   Click **Done** to close the **Add Interview Boxes** page.

4   The **Profile** page of the new Interview Box is displayed with the **Name** and **System ID** fields filled in.

5   Click the **Voice name** timestamp button to record a name.

6   From the **Language** list, select a language that callers will hear when they reach the Interview Box.

7   Click 💾 **Save** in the Title Bar.

Delete an Interview Box or Messages

> **IMPORTANT** Deleting an **Interview Box** does not delete all references to the system ID of the **Interview Box** that is being deleted. Any entities that route to such **Interview Box** must be updated so they do not route to the box that was deleted.
>
> Any messages currently stored in the **Interview Box** are automatically deleted.

To delete an interview box:

1   In the Navigation Pane, go to **Call Management** > **Interview Boxes** > **Profile**.

2   Find an Interview Box to delete using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Profile** page for the selected Interview Box is displayed.

3   In the Title Bar, click the ⊖ **Delete** icon to delete the box.

4   Click **OK** to confirm.

To deleting interview box messages:

1   In the Navigation Pane, go to Call **Management** > **Interview Boxes** > **Profile**.

2   Find an Interview Box to delete using the 🔍 **Search** icon or ⬅ **Previous** & ➡ **Next** icons from the Title Bar. The **Profile** page for the selected Interview Box is displayed.

3   Click **Delete Messages**.

4   Click **OK** to confirm.

Record Interview Box Questions

Record the questions and set the maximum time callers have to respond to each question after creating an interview box. Use a phone or the Web Administration Console to record the interview box questions.

To record interview box questions:

1   In the Navigation Pane, go to **Call Management** > **Interview Boxes** > **Questions**.

2   Click the **Question length** timestamp button to record the question.

3   In the **Reply Time Limit** field, type the maximum number of seconds for responses to a question.

> **TIP** Preferably, make Question #1 as an introduction that does not require a response from the caller. Set the reply time limit for Question #1 to **0** (zero).
>
> Question #2 (technically the first question to the callers) will play immediately after the recording for Question #1 is played.

4   Repeat **Steps 2** & **3** for the remaining interview questions.

5   Click 💾 **Save** in the Title Bar.

Configure How Messages are Taken for an Interview Box

Configure how the messaging system stores interview box messages. Caller replies to the interview questions are saved in a single message and each reply is separated by a beep.

To configure how messages are taken for an interview box:

1 In the Navigation Pane, go to **Call Management** > **Interview Boxes** > **Messages**.

2 Select **Allow callers to leave urgent messages** to enable an unidentified caller to leave an urgent message.

3 **[Optional]** Select **Mark all messages urgent** to mark all messages from unidentified callers as urgent.

4 In the **After taking a message** section, select one of the following:

   • **Route to the operator.** Routes callers to the System Operator Box.

   • **Route to.** Routes the caller to another system ID. If selected, type the system ID or click **Search** to find and select a system ID.

   • **Hang up**. Disconnects the call without saying good-bye.

   • **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good-bye and disconnects.

   • **Restart.** Returns the caller to the opening greeting box.

5 In the **Send to group** field, type a system ID for the group you want to receive the messages taken by the interview box or click **Search** to find and select a group.

> **NOTE** The name of the group must not exceed ten (10) characters, or include special characters, spaces, and numbers, if the group is used for outside caller group messaging.

6 Click 🖫 **Save** in the Title Bar.

Configure Language Boxes

Language Boxes enable callers to select a language for the system conversation. Use **Language Boxes** only when the messaging system has more than one language installed. Use a **Voice Detect Box** to automatically assign a language to callers.

• **Planning Language Boxes.**

   Each language box is assigned a unique system ID. The system manager owns the language boxes and only a system manager can add or change language boxes.

• **Language Select Call Transfer Type.**

   In most cases, it is best to use the **Await Answer** call transfer type throughout the system. This setting ensures that the language choice from an outside caller is retained throughout the call.

When a phone system does not include information about the call transfer type, the messaging system may ask callers to select a conversation language multiple times or may not play system prompts using the selected language. This happens when the call transfer types is **Release**.

- **Assigning a Language to Callers Without Touch tone Phones.**

  Language boxes provide language selection for callers that do not have touch tone phone. This feature is configured on the **Language Boxes** > **Key Map** page.

Steps for Configuring Language Box

1   **Add a language box.**

    See Add Language Boxes.

2   **Record instructions telling callers to select a language.**

    See Configure Key Mapping for Language Box.

3   **Configure the restart ID for each language.**

    See Configure the Restart ID for Each Language and Edit/Change Opening Box Profiles.

4   **Configure the opening greeting.**

    See Configure Opening Boxes.

Add Language Boxes

When multiple languages are installed on a messaging system, use language boxes to enable callers to select a language for the system conversation. A language can be assigned to a dedicated port if you expect to receive a substantial number of calls in a particular language.

To add and configure a language box

1   In the Navigation Pane, go to **Call Management** > **Language Boxes** > **Profile**.

2   In the Title Bar, click the ⊕ **Add** icon. The **Add Language Boxes** page displays.
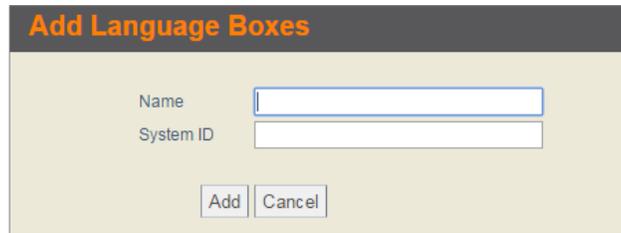
3   In the **Add Language Boxes** page, configure the following options:

    a   In the **Name** and **System ID** fields, type the appropriate values for the new language box.

    b   Click **Add**.

    c   Click **Done** to close the **Add Language Boxes** page. The new language appears on the page.

4   The **Profile** page of the new **Language Box** is displayed with **Name** and **System ID** fields filled in.

5 Click the **Introduction** timestamp button to record an introduction.

6 In the **One-key delay** filed, select the length of the pause to bypass one-key dialing to enter system IDs. This is usually a 1 or 2 second delay.

> **NOTE** Only system administrators can program **One-Key Dialing**.
>
> If the **One-Key Dialing** program has changed, the administrators must notify subscribers to change their greetings to match the new **One-Key Dialing** rules during a subscriber greeting.

7 In the **Wait for touch tones ... seconds** field, select the number of seconds the messaging system waits for a key press.

If the wait time is exceeded the messaging system takes the action specified in the **No TT** field on the **Key Map** page.

8 In the **Repeat greeting... times** field, select the number of times that the system repeats the introduction and greetings if there is no response from the caller.

When the number of repeats is exceeded, the system assigns the language and takes the action specified in the **No TT** field on the **Key Map** page. The default action for **No TT** is **Restart**, which returns the caller to the **Opening Box**.

9 Click 💾 **Save** in the Title Bar.

Configure Key Mapping for Language Box

Use the Key Map page to record instructions describing how to select a language and set the action the system takes for each language selection. Create up to 10 different recordings (numbered 0 through 9), one for each number on the phone keypad. Each recording should be in the same language specified in the Language list for the key.

To configure key mapping:

1 In the Navigation Pane, go to **Call Management** > **Language Boxes** > **Key Map**.

2 Click the **Greeting** timestamp button to record the greeting in the language selected.

3 From the **Language** list, select a language.

4 From the Action list, select an action the messaging system takes when the caller selects the language:

- **Hang up.** Disconnect without saying good-bye.

- **Route to.** Routes the caller to another system ID. If selected, type the value in the **System ID** box or click **Search** to find and select a system ID.

- **Route to the operator.** Routes callers to the System Operator Box.

- **Restart.** Returns the caller to the opening greeting box.

- **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good-bye and disconnects.

5   In the **No TT** (No Touch Tone) setting, configure the following options:

No TT is the default used for callers who do not respond with a touch tone.

   a   Select a **Language**.

   b   Select an **Action**. The default action is **Restart**. This sends the caller back to the Opening box.

   c   Type a **System ID** for an extension or box that is used when callers do not select a language. Click **Search** to locate the system ID.

6   Click 💾 **Save** in the Title Bar.

Configure the Restart ID for Each Language

Configure how the system restarts calls for each language installed. This configuration eliminates the possibility of the system asking a caller to select a language multiple times.

The system restarts a call when:

- A caller reaches a box with the restart action configured.
- A caller presses the `#` key after hearing the "say bye" prompt.

When a messaging system has only one language installed, the system restarts the call and sends the caller to the **Opening Box** greeting.

- For more information about how the **Restart ID** can be configured to be used with an **Opening Box**, refer to the Edit/Change Opening Box Profiles section.
- For more information about how the **Restart ID** can be configured to be used with a **Language Box** through an **Opening Box**, refer to the Route Callers to a Language Box section.

Systems with more than one language should restart calls in a box using the selected language. This box can be a **Voice Detect Box**, a **Transaction Box**, a **Directory Menu** or **Group**, an **Operator**, an **Opening Box**, or any other valid **System ID**.

Configure Voice Detect Boxes

A **Voice Detect Box** is a type of transaction box that listens for verbal caller responses instead of touch tones. It is used when the phone system or service area includes callers that do not have touch tone access and the messaging system is not configured to detect dial pulses.

Voice detect offers menus and directories to callers then listens for spoken sounds and silence, not touch tones.

Each messaging system has one sample **Voice Detect Box** configured. It has a name, a system ID, and an owner. When a **Voice Detect Box** owner is deleted from the system, any **Voice Detect Boxes** owned by the subscriber are automatically deleted.

Voice Detect Call Holding

Configure voice detect call holding for a **Voice Detect Box**. With this setting, callers say "Yes" or nothing instead of pressing a key to indicate that they want to hold for a busy extension. Voice detect call holding

is available on **Voice Detect Boxes**, **Transaction Boxes**, the **System Operator Box**, and for individual subscribers.

Steps for Configuring Voice Detect Box

1   **Plan the voice detect application.**
    Decide how many voice detect boxes you need and how callers are routed to them.

2   **Add the voice detect boxes.**
    See Add Voice Detect Box.

3   **Configure the voice detect box.**
    See Configure the Voice Detect Box Profile.

4   **Configure call transfer settings.**
    See Configuring Call Transfer for a Voice Detect Box.

5   **Configure greetings and actions.**
    See Configure Voice Detect Box Greetings and Action After Greetings.

6   **Configure message taking settings.**
    See Configuring How Voice Detect Box Messages are Taken and Configuring a Destination ID for Speech or Silence.

7   **Record the opening greeting.**
    See Configure Opening Boxes.

8   **Test the messaging system.**
    Call the system and confirm that the system handles the call correctly when you say "Yes" and when you remain silent.

Add Voice Detect Box

The default voice detect box, $VOICE, is installed with the messaging system. Additional voice detect boxes can be added to the messaging system. Use the following procedure to add voice detect boxes to the messaging system.

To add a voice detect box:

1   In the Navigation Pane, go to **Call Management** > **Voice Detect Box** > **Profile**.

2   In the Title Bar, click the ⊕ **Add** icon. The **Add Voice Detect Boxes** page displays.
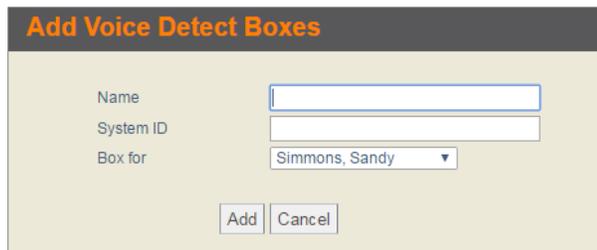
3   In the **Add Voice Detect Boxes** page, configure the following options:

   a   In the **Name** field, type the name for the new Voice Detect Box.

   Use $ (dollar sign) for the first character in the file name to create a name that cannot be dialed using a phone.

   b   In the **System ID** field, type a unique ID for the new Voice Detect Box.

   c   From the **Box for** list, select an owner of the new box.

   d   Click **Add**.

   e   Click **Done** to close the **Add Voice Detect Boxes** page.

4   The **Profile** page of the Voice Detect Box displays with the **Name** and **System ID** fields filled in.

Configure the Voice Detect Box Profile

1   In the Navigation Pane, go to **Call Management** > **Voice Detect Boxes** > **Profile**.

2   In the **Name** field, type a new name for the voice detect box.

> **CAUTION** When you change the name or system ID of a Voice Detect Box make sure you also update all references to the name or system ID.

3   In the **System ID** field, type a new system ID.

4   Click the **Voice name** timestamp to record the name for the box.

5   From the **Language** list, select a language that callers hear when they reach the Voice Detect Box.

6   From the **Schedule** list, select a schedule. For more details on defining schedule and the options, refer to the Help under the topic, **System Schedules**.

> **NOTE** If this field is blank, the box follows the schedule of the port that answers the call.

7   Click 💾 **Save** in the Title Bar.

Configuring Call Transfer for a Voice Detect Box

The **Voice Detect Box** call transfer settings determine how the phone and the messaging systems interact during a call transfer. When call transfer is turned on and the transfer type is **Await Answer**, the messaging system tries to transfer the call to the phone or extension listed.

If the extension is busy or unanswered, the system plays a greeting for the box and follows the configured after-greeting action.

To configure call transfer for a transaction box:

1   In the Navigation Pane, go to **Call Management** > **Voice Detect Boxes** > **Call Transfer**.

2   Select one or both of the following:

- Select the **Day-transfer to** checkbox to transfer operator calls during business hours, and then type the operator extension ID in the box.

- Select the **Night-transfer to** checkbox to transfer operator calls outside of business hours, and then type the extension ID in the box.

3   From the **Transfer Type** list, select a call transfer type as follows:

> NOTE The **Await answer** transfer type must be enabled to be able to configure **Transfer options** settings. Otherwise, the options will not be available.

- **Await Answer.** The system transfers the call to the extension if the call is answered within the number of rings specified in the **Wait for...rings** field. If the subscriber phone is busy or goes unanswered, the system plays the greeting and then takes the after‑greeting action.

- **Wait for ringback.** The system transfers the call to the extension if a call is answered within the number of rings specified in the **Wait for ... rings** field. If the call is not answered within the specified number of rings, the call is released to the phone system.

  - **For unanswered calls**, the caller cannot leave a message unless the phone system transfers the call using call forward to personal greeting.

  - **For busy calls**, the system plays the greeting, then takes the after‑greeting action.

  - **When this transfer type is selected**, some transfer options are unavailable. This call transfer type is not supported with phone systems that use DTMF call progress.

- **Release**. The system releases the call after dialing the extension or phone number. If the subscriber phone is busy or goes unanswered, the caller can leave a message if the phone system is configured to transfer the call using call forward to personal greeting.

4   If the call transfer type **Await answer** or **Wait for ringback** is selected, then in the **Wait for... rings** field, type the number of times the extension rings before the call is transferred.

> NOTE This setting must be one less than the number of rings set on the phone system. The number should not be set to less than **3** rings.

> NOTE If the number of rings is greater than **0** (zero), then the **Allow holding**, **VOX holding**, and **Transfer Options** are activated.

5   Select the **Allow holding** checkbox to allow the callers to be able to hold if the line is busy.

6   **[Optional]** Select the **Use VOX holding** checkbox for voice detect call holding. Callers speak to hold instead of pressing a touch tone key.

7   In the **Transfer options** section, select the option(s) that apply:

> NOTE These options are available only when the **Await answer** transfer type is selected and the number of **Wait for ... rings** is greater than **0** (zero).

- **Gather phone number.** Ask callers to provide a phone number.

- **Gather account number.** Ask callers to provide their account number. Click the **Use customized prompt for Gather Account Number** timestamp to record a custom prompt.

- **Announce transfer.** Play a beep before connecting the caller. With most phone systems, this lets the subscribers know when the call is connected or that the call is from an external caller.

- **Confirm before transfer.** Ask if the subscriber wants to take the call before the system transfers the call. If the subscriber does not take the call, the system plays the appropriate greeting and takes the action specified in the **After Greeting** section from the **Greetings** page.

- **Introduce caller.** Play the "Call for <subscriber's name>" prompt before connecting the call. Use this option when more than one subscriber uses the same extension.

- **Record caller's name.** Ask callers to record their name. Before the call is transferred, the subscriber hears the "Call from <caller's name>" prompt.

  If the subscriber rejects the call or is not available, the recorded name is not saved.

- **Record and save caller's name.** Ask callers to record their name. Before the call is transferred, the subscriber hears the "Call from <caller's name>" prompt.

  If the subscriber rejects the call or is not available, and the caller leaves a message, the recorded name plays at the beginning of the message.

  If the caller does not record a message, the subscriber receives the caller's recorded name as the message.

8   Click the **Intro prompt** timestamp button to record a greeting. If a greeting is not recorded, callers may incorrectly assume that they have been disconnected.

9   Click the **Prompt to gather ID/phone number** timestamp to record a custom recording that is played before the call transfer occurs to collect the caller's ID or phone number.

- If there is a recording in this field, the messaging system plays the recording before routing a caller from outside the messaging system to the destination.

- If there is no recording in this field, the system plays a prompt from the **Gather ID** prompt set.

10   Click 💾 **Save** in the Title Bar.

Configure Voice Detect Box Greetings and Action After Greetings

Voice Detect Box greetings are located on the **Greetings** page. If call transfer is turned off or if the extension is busy or unanswered, the system plays the active greeting. The system then takes the **After-greeting** action specified on the **Greetings** page.

The **Active greeting** section configures which greeting is played: day, night or alternate greeting. If a caller does not press any touch tone keys during the **Voice Detect Box** greeting, the system takes the **After-greeting** action.

The **Voice Detect Box** greetings can be recorded via the Web Administration Console or a phone. Only the owner of the **Voice Detect Box** can use a phone to change the greetings. See Record Greetings Using a Phone.

To configure greetings for voice detect box:

1 In the Navigation Pane, go to **Call Management** > **Voice Detect Boxes** > **Greetings**.

2 In the **Active greeting** section, select a greeting to be used when the messaging system answers calls as follows:

- **Day/Night greeting.** Enables the standard day/night greeting. Once the greeting has been played, the messaging system takes the action specified in **After day greeting** or **After night greeting**.
    - Click the timestamp button on left to record a day greeting.
    - Click the timestamp button on the right to record a night greeting.

- **Alternate greeting.** Enables the alternate greeting. When the alternate greeting is enabled, it is used in both day and night modes.
    - Click the timestamp button to record an alternate greeting.

3 In the **After Day Greeting** or **After night greeting** field, select one of the following options:

- **Take a message.** Record a message for the owner of the box.
- **Take a message for group.** Record a message for the members of a message group. Type the name of the group or click **Search** to find and select a group.

- **Route to the operator.** Route the caller to the System Operator Box.
- **Route to.** Route the call to the specified system ID.
- **Hang up.** Disconnect without saying good-bye.
- **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good-bye and disconnects.
- **Restart.** Return the caller to the opening greeting box. This setting is not recommended for use with the system operator box.

4 Click 🖫 **Save** in the Title Bar.

5 Repeat this procedure to configure the night and alternate greetings.

Record Greetings Using a Phone

Only the **Voice Detect Box** owners can use a phone to change greetings when the system ID for the **Voice Detect Box** does not contain a **$** (dollar sign) or other symbol not found on the touch tone phone keypad.

When a system ID contains a $ or other symbol not found on the touch tone phone keypad, greetings can only be changed using the Web Administration Console.

To record voice detect box greetings using a phone:

1   Call the system and enter the personal ID and security code of the Voice Detect Box owner.

2   Press 5 to leave a message.

3   Spell the first three letters of the box name or enter the system ID. The system states which greeting is active.

4   Follow the system conversation prompts to record the standard day and night greetings, an alternate greeting, or to switch between the standard and alternate greetings.

Configuring How Voice Detect Box Messages are Taken

Control how the system takes messages for the voice detect box, configure the maximum length of a message, specify if callers can leave urgent messages, and configure the action after taking a message.

To configure how messages are taken for a voice detect box:

1   In the Navigation Pane, go to **Call Management** > **Voice Detect Boxes** > **Messages**.

2   Select **Allow callers to change messages they just recorded** to enable callers to edit their messages.

3   Select **Allow callers to leave urgent messages** to enable unidentified callers to mark their message as urgent.

4   Select **Mark all messages urgent** to have all **System Operator Box** messages delivered as urgent.

> **NOTE** This setting is grayed out if **Allow callers to leave urgent messages** is not selected.

5   In the **Maximum message length to record from an unidentified caller ... seconds** field, type the maximum length, in seconds, of messages from an unidentified caller.

6   In the **After taking a message** field, select one of the following options:

> **NOTE** This setting applies only if the **After day/night greeting** action from the **Greetings** page is selected as **Take a message**. If **Take a message** is not selected, these settings are not available.

- **Route to.** Route the caller to another system ID. Type the system ID or click **Search** to find and select a system ID.
- **Route to operator.** Route the caller to the system operator box.

- **Hang up.** Disconnect without saying good-bye.
- **Say bye.** Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good-bye and disconnects.
- **Restart.** Return the caller to the opening greeting box. This setting is not recommended.

7   Click ⊞ **Save** in the Title Bar.

Configuring a Destination ID for Speech or Silence

When configuring a voice detect box specify the system IDs where callers are routed if they speak or remain silent.

To limit phantom calls to the operator, do not set the system to route callers to the operator if they remain silent. Route silent callers to another box with the action after greeting set to Hang up or Say bye.

To configure the system ID where callers are routed from a voice detect box:

1   In the Navigation Pane, go to **Call Management** > **Voice Detect Boxes** > **Voice**.

2   In the **After the caller speaks, route to** box, type the system ID or click **Search** and select a routing destination the caller will be routed to after speaking.

3   In the **If the caller remains silent, route to** box, type the system ID or click **Search** and select a routing destination the caller will be routed to when they remain silent.

4   Click ⊞ **Save** in the Title Bar.

Configuring the UM8000 Messaging System

Enable Access to Mailbox Manager

Subscribers use the **Mailbox Manager** to read or listen to their messages and change their personal settings using a computer connected to the network. If your organization is using **Mailbox Manager**, you must enable access to the **Mailbox Manager**, and then set the default subscriber template or individual subscriber access options.

To enable a system-wide access to Mailbox Manager:

1   In the Navigation Pane, go to **System** > **Configuration** > **General**.

2   Select **Allow Mailbox Manager Access**.

3   In the **URL for Web Mailbox Manager** section, select one of the following:

- **Use automatic settings.** When selected, the default URL appears.
- **Use custom settings.** Type another URL for the messaging system server.

4   In the **Web encryption for users** section, for **Administrator Console**, **Mailbox Manager**, and **Mobile WMM**, select one for each of the web applications to specify the encryption setting:

- **Require SSL.** Use SSL encryption only for log on, password change requests, and enrollment.
- **Do not Require SSL.** Do not use SSL encryption for Web Mailbox Manager. Slows performance.

5   Click 🖫 **Save** in the Title Bar.

Understand Directory Assistance

When a caller does not know a subscriber extension, they can use the alphabetic or numeric directory assistance to select an individual. Operator assistance is not required to use the alphabetic or numeric directory assistance.

Alphabetic Directory Assistance

Alphabetic Directory Assistance is the default setting for the messaging system. **Alphabetic Directory Assistance** enables a caller to find a subscriber using the phone keypad to spell the subscriber's name by entering the first few letters (usually 3). The system plays the name of the closest matching subscriber. If the system finds more than one match, it plays each match until the caller selects one.

When using **Alphabetic Directory Assistance**, make sure that all subscriber names are typed into the system using a consistent format. Type subscriber names using last name, first name; or first name, last name format.

Selecting the **Include in alphabetic directory assistance** option on the **Subscriber** > **Access Options** page includes the subscriber in the **Alphabetic Directory Assistance**.

To configure the alphabetic directory assistance:

1   In the Navigation Pane, go to **System** > **Configuration** > **System Settings**.

2   In the **Directory Assistance** section, configure the following options:

   a   In the **Directory Assistance** box, type the ID the calls should dial to be routed to the alphabetic directory. The default is **555**.

   b   Select **Transfer call automatically if there is only one possible match** when there is only one who matches the specified spelling.

   When this option is not selected, the callers must dial the extension even if there is only one matching subscriber.

   c   Select **Enable three character directory mode (use at most 3 characters to identify a subscriber)** to allow callers to enter no more than three letters before the search begins.

   d   If you did not select the **Enable three character directory mode** option, in the **Maximum number of characters used to identify a subscriber** field, type the maximum number of letters subscribers must enter to spell a name.

   e   From the **Sort directories by** list, select either **Last name** or **First name**. The names will be sorted and searched either by Last name or First name.

   f   In the **Directory time out... milliseconds** field, type the number of milliseconds the system waits for additional touch tones. The default value is **1000**.

3   Click 💾 **Save** in the Title Bar.

Numeric Directory Assistance

Numeric Directory Assistance enables callers to press numbers instead of letters to look up a subscriber when their phone keypads do not have letters. **Numeric Directory Assistance** involves grouping subscribers using a common characteristic such as department, location, or schedule then creating a menu of choices that assigns a single touch tone to each grouping.

Configuring **Numeric Directory Assistance** requires three steps:

- Create the directory groups.
  Divide subscribers into groups based on a common characteristic such as department or location.

- Add subscribers to the directory groups.

- Create a menu of One‑Key numeric dialing choices for callers.
  Maximum of eight directory groups or sub-menus can be created.

Callers can use the system wildcard digit, **1** (one), to select numbered message groups.

> **For example:**
>
> Pressing `5` `1` `1` lists all message groups starting with the number **5**, while pressing `5` `3` `1` lists all message groups starting with the numbers **53**.

NOTE Subscribers must have recorded names and an extension ID to be included in numeric directory assistance.

Directory Groups

Numeric directory assistance requires ongoing maintenance as new subscribers or groups are added to or deleted from the messaging system. Only system managers can add or remove subscribers.

Directory groups differ from the message groups in the following ways:

- Messages cannot be left for a directory group.

- Every directory group is owned by the system.

- A directory group has its own system ID called the Directory ID.

- Subscribers added to the directory group become group members. Each subscriber must have a recorded name and valid system ID.

Directory Menus and Sub-menus

Directory menus create one‑key dialing rules for numeric directory assistance linking the directory groups to menus and submenus.

A directory menu is assigned a unique system ID that is called Directory ID. Outside callers enter the directory ID to hear the directory menu. Use the directory ID to automatically route callers to the directory menu using the transaction box, interview box, system operator box, public interview box, or subscriber greeting page Route to field.

A directory menu lists the name of each directory group or submenu. The system automatically creates a one‑key dialing menu from the list of directory groups and menus. Outside callers hear directory assistance for a particular directory group or they press a single touch tone to select a sub-menu.

Change Message Sorting

Use this page to configure the sort and playback order of messages.

To configure message playback order

1   In the Navigation Pane, go to **System** > **Configuration** > **Message Sorting**. The Message Sorting page displays.

2   In the **Select Message Order** table, click the ⬆ **Up** and ⬇ **Down** arrows to specify the order that the message types appear in the messaging system.

3   To move up an entity, click the ⬆ **Up** arrow in the same row.

4   To move down an entity, ick the ⬇ **Down** arrow in the same row.

5   Click 💾 **Save** in the Title Bar.

Configure E‑mail Settings

Configure the e‑mail server settings properly in order to be able to exchange e‑mails with the system.

To configure e‑mail integration

1   In the Navigation Pane, go to **System** > **Configuration** > **E-mail** settings.

2   The **Server Type** field displays the email server protocol specified during installation.

3   In the **Outgoing e-mail server** box, type the IP address of the e‑mail server.

> **NOTE** If a valid domain name server was configured using the Maintenance Menu, then a server name can be used instead of the IP address.

4   In the **Port** box, type the SMTP port for your server. The default values are listed below. Type the vale if your e‑mail server uses a different port.

- SMTP   25
- IMAP   143
- POP3   110
- SMTP with SSL   465
- IMAP with SSL   993
- POP3 with SSL   995

5   Select **Use SSL** to enable the SSL secure transport protocol. When selected, the port number changes to **465**.

6   Select **Use authentication** if you want the system to use authentication for outgoing email.

7   From the Authentication list, select a type from the following:

- **PLAIN.** PLAIN is a simple clear text password mechanism. The mechanism uses a user name and password to authenticate users.

    > **NOTE** PLAIN authentication is not supported on Microsoft Exchange servers.

- **LOGIN.** The LOGIN mechanism is a nonstandard mechanism, and is similar to the PLAIN mechanism except that LOGIN lacks the support for authorization identities.

- **NTLM.** NTLM (NT LAN Manager) is a Microsoft authentication protocol used with the Microsoft Windows Network. This protocol uses a challenge response sequence requiring the transmission of three messages between the client and server.

    > **NOTE** NTLM authentication is not supported on Lotus or GroupWise servers.

8   In the **User name** field, type the user name of the account that the messaging system uses to send notifications.

9   In the **Password** field, type the password for the account.

10 In the **Global e-mail address** field, type the e‑mail address of the account that the messaging system uses to send notification.

11 In the **Display name** field, type a name. This name appears in the **From** field of notification message.

12 Click ⊞ **Save** in the Title Bar.

Create the E‑mail Message Template

The e‑mail message template defines the format for e‑mail notification messages, message to copy, message to forward, and faxes sent from the messaging system.

To define the e-mail notification message

1 In the Navigation Pane, go to **System** > **Configuration** > **E-mail Message Template**.

2 From the **Language** list, select a language to use for the notification e‑mail.

Make sure that the selected language is the language in use by the users who will be receiving emails based on the template. Templates are language specific.

> **For example:**
> Changes to the U.S. English template will not be reflected in the templates presented to users of U.K. English or any other language.

3 In the **Subject** field, write the text for the subject template. The text appears in the subject line of email notification messages.

> **For example:**
> Message from <senderName>.

4 In the **Body** field, write the text for the body template. Use the available tags to construct customized messages. The messaging system replaces the tags with the appropriate information.

> **CAUTION** The **Body** field requires at least one tag to be filled in. Otherwise, the delivery will fail. The tags are replaced with the appropriate information before being sent to the recipient. Use the following tag when formatting your system-wide e-mail notification:
>
> | Tag | Description |
> |---|---|
> | [senderName] | Sender's name |
> | [senderPhone] | Sender's phone |
> | [senderAccount] | Sender's account (only available if configured in subscriber transfer/screening options) |
> | [messageTimestamp] | Message received timestamp on the messaging system |
> | [messageDuration] | Message length in seconds |
> | [messageSize] | Message size in kilobytes |
> | [messageFlag] | Message Special flags. Available message flags: **PRIVATE** and **URGENT** |
> | [voicemailURL] | URL of the messaging system |

[subscriberName]	Subscriber's name
[subscriberExtension]	Subscriber's extension
[notificationType]	Message notification type.
	Available notification types: **voice**, **fax**, **message copy**, **forwarded voice**, **forwarded fax**, **forwarded fax with voice**, **reply fax**, **reply voice**, and **IM**

5   Click **Preview** to view a sample of the notification with the settings you configured.

6   Click 🖫 **Save** in the Title Bar.

Configuring Hospitality

The **System** > **Configuration** > **Hospitality Settings** page is used to configure the default settings for the hospitality feature in the messaging system, the Property Management System (PMS), the default wake-up call, and the default check-in message.

Configure Hospitality Settings

Use the **System** > **Configuration** > **Hospitality Settings** page to provide customized messaging system services for hotel guests wake‑up calls, hotel guest directory, and guest information services.

To change the hospitality configuration settings:

1   In the Navigation Pane, go to **System** > **Configuration** > **Hospitality Settings**.

2   In the **Reset message box ID** field, specify the code used to check out hotel guests and reset the mailbox. The default ID is **636**.

> **NOTE** For the purpose of security, we recommend that you change the default ID to prevent unauthorized access.
>
> If a **System ID** with **$** is used, then the IDs would need to be accessible by the **One-Key Dialing** options from another box.
>
> To configure the **One-Key Dialing** option, refer to the **One-Key Dialing** configuration instruction for each box from the Managing Calls chapter of this guide.

3   In the **Post checkout ID** field, specify an access code that enables guests to review unheard messages after they check out. The default ID **654**.

4   In the **ID for guest directory**, set the ID that callers enter to access the guest directory. Leave this field blank if the business does not have a guest directory.

5   Select **Auto xfer** to automatically transfer callers to the guest room extension.

6   Select **Tall hotel** when you have overlapping room extensions.

   > For example: **110** and **1102**.

7   If **Tall hotel** is selected, specify number of seconds in the **Tall hotel ID entry delay ... seconds** field. This is the number of seconds that the messaging system waits for the input of additional digits before transferring a call. The default is **2**.

8   In the **PMS Device Configuration** section, configure the options as follows:

   a   From the **PMS Integration** list, select the PMS model and integration type.

      There are two types of PMS integrations you can choose from: **Internet Protocol (IP)** and **Serial Protocol**. The **Internet Protocol** type is tagged with "**(IP)**" at the end of the integration name. Otherwise, it is a **Serial Protocol** type.

> **For example:** **NEC PVA (IP)** and **NEC PMS LITE**

- If you have selected an **Internet Protocol** integration type, go to **Step b**.

- If you have selected a **Serial** integration type, skip to **Step c**.

b If you selected an IP integration, configure the following options:

- In the **Server Address** box, type the IP address of the server.

- In the **TCP/IP Port** box, type the TCP/IP port number.

- Skip to **Step d**.

c If you have selected a serial integration type, configure the following options:

- From the **Baud Rate** list, select the rate that specifies the speed of the serial connection to the PMS.

- From the **Parity** list, select the serial connection parity to the PMS.

- From the **Stop Bits** list, select the stop bits of the serial connection to the PMS.

- From the **Data Bits** list, select the data bits of the serial connection to the PMS.

d Select **Resync on line up** if you want to re-synchronizes the two systems as soon as the connection is re-established. This option is recommended if hospitality guest settings that are synchronized with the PMS are managed on the voicemail side.

e Select **Ask for resync on line up** if you want to send a message to ask the PMS to initiate the re-synchronization, if necessary. This option is recommended if all guest management is done on the PMS side.

9 In the **Wake-up Call** section, configure the following options:

a Select **Allow guests to set their own wake-up calls** to enable guests to use the phone to set their own wake‑up calls.

b When **Allow guests to set their own wake-up calls** is selected, select **Set Wake-up call before listening to messages** to change the TUI (Telephone User Interface) announcement order of messages and wake-up call settings, so that the wake-up call options will be provided before the message access options.

c Select **Play current day and time after wake-up greeting** to enable the system to announce the time, day of week, month and date after providing the wake-up greeting.

d In the **Wait for ... rings** field, specify the number of times a guest phone rings for wake‑up calls. The default is **4** rings.

e In the **Ring frequency: ... minutes** field, specify the number of minutes the system waits before retrying a wake‑up call that was not answered. The default is **2** minutes.

f In the **Maximum number of retries** field, specify the maximum number the wake‑up call attempts to make when the call was not answered. The default is **2** attempts.

g In the **Wake-up Call Expiration** field, specify the maximum amount of time that the system will continue to repeat the wake-up call sequence. After the specified time, the wake-up call will expire and no longer make calls.

h In the **Wake-up greeting ID** field, enter the system ID of the wake‑up call greeting so that hotel staff can change the wake‑up greeting over the phone. The default is **656**.

i In the **On unanswered notify ID** field, type the subscriber ID to be notified when the final wake‑up call retry is unanswered.

10 In the **Check-in message** section, configure the following:

a Select **Enable check-in message** to turn on check‑in message.

b In the **Check-in message ID** box, specify the recording length for the check‑in message greeting.

c Click the timestamp button to record a greeting. If a greeting has not been recorded the system uses the default greeting in the default system language.

d Record the check‑in message greeting.

11 In the **Hospitality field customization** section, use the **Custom field 1 label** and **Custom field 2 label** boxes to assign tags or notes that will label the custom fields when viewing Hotel Guests or Hospitality message groups.

12 Click 💾 **Save** in the Title Bar.

Configure the Hotel Guest Directory

The hotel guest directory enables callers to transfer directly to a guest's room without the assistance of an operator. The messaging system never provides callers with the guest's room numbers.

Guests can select if they are included in the guest directory. To be included in the hotel guest directory, guests access the messaging system, select the guest directory setting, and follow the system prompts to record their name.

To enable the use of the hotel guest directory

1 In the Navigation Pane, go to **System** > **Configuration** > **Hospitality Settings**.

2 In the **ID for guest directory**, set the ID that callers enter to access the guest directory. Leave this field blank if the business does not have a guest directory.

3 Configure the **One‑Key Dialing** rule for the guest directory.

4 Assign a touch tone key pad number to the guide directory ID.

5 Record a greeting providing instructions for callers.

> **For example**: Press 1 for the guest directory.

Configure Extension Numbers for Overlapping Rooms

When the phone system uses overlapping room numbers of different lengths such as **110** and **1102**, the messaging system must be able to distinguish between the numbers to correctly transfer a call or send a message lamp on or off code.

The **Tall hotel ID entry delays ... seconds** option is used to help differentiate overlapping room numbers. The delay value prevents the messaging system from transferring a call or sending a lamp code until the complete extension number has received.

To enable this delay, the **Tall hotel ID entry delays ... seconds** field must be specified. Without this setting, extension **1102** never receives a call nor has the lamp lit.

To configure for overlapping room extension numbers:

1   In the Navigation Pane, go to **System** > **Configuration** > **Hospitality Settings**.

2   Select **Tall hotel** when you have overlapping room extensions.

3   Specify number of seconds in the **Tall hotel ID entry delay ... seconds** field. The messaging system will wait for the number of second specified before transferring a call. The default is **2**.

4   Click 💾 **Save** in the Title Bar.

5   In the Navigation Pane, go to **System** > **Switch** > **Switch Information**.

6   In the **Integration options** field, type *TIA,,,* (three commas which are pauses) to the end of any existing string. Spaces separate the different strings.

> **For example:** F0 ISVM=10,15 INT=DIGITAL RCV=6 TIA,,,

7   Click 💾 **Save** in the Title Bar.

8   In the Navigation Pane, click **Switch** > **MWI**.

9   In the **On (activation) code** and **Off (deactivation) code** fields, type ,, (two commas) immediately at the end of the existing codes.

> **For example:**
> If the field already has ***54X**, type **54X,,*

10 Click 💾 **Save** in the Title Bar.

Configure Wake‑up Calls

The messaging system can be configured to enable guests to configure and manage their wake‑up calls. Use the system reports available to help you to monitor and manage the wake‑up call service.

The system can make approximately three wake‑up calls per minute per dial‑capable port on the messaging system. Wake‑up calls are sent out only on ports set to Answer/Dial out, Dial out only, Answer/Message, or Message only.

If your guests experience delayed wake‑up calls, review the port configuration to determine whether an adequate number of ports are configured to meet the guest's needs.

To enable the wake‑up call feature for guests

1   In the Navigation Pane, go to **System** > **Configuration** > **Hospitality Settings**.

2   In the **Wake-up Call** section, configure the following options:

   a   Select **Allow guests to set their own wake-up calls** to enable guests to use the phone to set their own wake‑up calls.

   b   When **Allow guests to set their own wake-up calls** is selected, select **Set Wake-up call before listening to messages** to change the TUI (Telephone User Interface) announcement order of messages and wake-up call settings, so that the wake-up call options will be provided before the message access options.

   c   Select **Play current day and time after wake-up greeting** to enable the system to announce the time, day of week, month and date after providing the wake-up greeting.

   d   In the **Wait for ... rings** field, specify the number of times a guest phone rings for wake‑up calls. The default is **4** rings.

   > **NOTE** To prevent unanswered wake‑up calls from being forwarded to the guest's voice mailbox, the number of **Wait for ... rings** should be less than the number of rings that the phone system waits before forwarding calls to the messaging system.

   e   In the **Ring frequency: ... minutes** field, specify the number of minutes the system waits before retrying a wake‑up call that was not answered. The default is **2** minutes.

   > **NOTE** If this time interval is too long, guests might receive the wake‑up call too late for their schedule. If this interval is too short, the entire series of wake‑up calls may get missed if the guest is in another room of the suite or is otherwise unable to answer the call.

   f   In the **Maximum number of retries** field, specify the maximum number the wake‑up call attempts to make when the call was not answered. The default is **2** attempts.

   g   In the **Wake-up Call Expiration** field, specify the maximum amount of time that the system will continue to repeat the wake-up call sequence. After the specified time, the wake-up call will expire and no longer make calls.

   h   In the **Wake-up greeting ID** field, enter the system ID of the wake‑up call greeting so that hotel staff can change the wake‑up greeting over the phone. The default is **656**.

   i   In the **On unanswered notify ID** field, type the subscriber ID to be notified when the final wake‑up call retry is unanswered.

3   Click **Save** in the Title Bar.

Appendix A – Configuration Options

Access Options

Table 1. Access Options Description

Field	Description
Conversation Options	
Allow access to setup options	Enable subscribers to change configuration settings using a phone: personal greetings, message groups, call transfer, message delivery, recorded name, spelled name, security code, and directory listing.
	Personal greetings can be changed only if Hear conversation in traditional order is not enabled.
Announce message lengths	Enable the system to state the length of the messages. For example, "You have three new messages totaling 3 minutes, 20 seconds. Would you like to hear them?"
Use menu mode conversation	Enable the menu conversation instead of the Yes-and-No conversation.
Use hands-free message retrieval	Enable hands-free messages retrieval, the system does not ask, "Would you like to hear them?" between message lists. Use this selection only if the phone system has an immediate disconnect feature.
Play time stamp before message	The time and date stamp of a message is announced before playing the message.
Allow access to old messages	The subscriber can review old messages.
Allow access to public messages	The subscriber can access public messages.
Receive notification for public messages	The system notifies a subscriber when a public message is received.
	Enable subscribers who have public message access and want their message waiting lamps lit, or disable subscribers who want notification only for messages sent specifically to them.
Allow urgent messages	Subscribers can mark messages to other subscribers as urgent.

Hear conversation in traditional order	The subscriber hears the Yes-and-No conversation in the following order: check new messages, leave messages, change greetings, and review old messages.
	Subscribers with touch tone phones press `#` twice for configuration settings other than greetings.
Play voice name on sign-in	The subscriber's recorded name is played before offering any menu choices when the subscriber signs in.

Administration	
Include in alphabetic directory assistance	Include the subscriber in alphabetic directory assistance.
	NOTE The subscriber must have a name recorded to appear in the automatic (alphabetic) directory.
Require first-time enrollment	Requires subscribers to enroll themselves the first time they call the system or use Mailbox Manager. The system does not deliver messages to subscribers until they have enrolled.
Allow to change phone notification settings and call screening options	The subscriber can change notification and screening settings.
	Allow to change holding settings. The subscriber can use a phone to change call holding settings.
	NOTE This setting is turned off by default for security reasons. This setting must be enabled to allow subscribers to configure call transfer and message notification.
Allow personal greetings	Subscriber can change personal greetings.
Allow Mailbox Manager Access	Subscriber can access the web-based Mailbox Manager application using a computer and a network connection.
Allow to change automatic login number	The subscriber can change the phone number of a mobile or other external phone that is used to automatically log into the messaging system. This feature requires automatic number identification, such as Caller ID.
Allow to change maximum number of messages	The subscriber can change the number of received messages allowed in the subscriber's inbox before the system stops recording new messages.
	NOTE This option is available only if the Maximum number of messages field on the **Subscribers** > **Messages** page is configured.

Message Addressing/Recording	
Allow to send messages	The subscriber can send messages to subscribers, guests, or groups.
Restrict sending messages to guests and groups only	The subscriber cannot send messages to other subscribers. The subscriber can only send messages to guests and message groups.
Allow to address a message to multiple recipients	The subscriber can address a message to more than one person at a time.
Allow to send private messages	The subscriber can mark messages as private. Private messages cannot be redirected by the recipient.
Allow to request future delivery	The subscriber can mark messages for future delivery.
Allow to request return receipts	The subscriber can mark messages for explicit return receipt.
Always request return receipts	Marks every message sent by the subscriber for return receipt. To avoid redundant receipts and summary announcements, always use this setting with Play receipt summary after all messages heard.
Allow to send messages to remote site[1]	Enables the subscriber to send messages to subscribers and message groups at remote sites. This setting is used only on messaging systems with the network messaging feature. This feature allows two or more messaging systems to exchange messages with one another.
Allow to send urgent messages to remote site[1]	Enables the subscriber to send urgent messages outside the message delivery schedule to subscribers and message groups at remote sites. This setting is used only on messaging systems with the network messaging feature. This feature allows two or more messaging systems to exchange messages with one another.
Play receipts when messages opened at remote sites[1]	Specifies whether the messaging system announces when a recipient at a remote site first listened to a message. Otherwise, the system announces when the message was transmitted. This setting is used only on messaging systems with the network messaging feature. This feature allows two or more messaging systems to exchange messages with one another.
Address messages by extension	Enables the subscriber to send messages using the extension number of the recipient, instead of the first three letters of the last name.

Allow to edit subscriber-to-subscriber messages	The subscriber can add to, listen to, or rerecord a message to another subscriber.
Allow to redirect messages	The subscriber can redirect messages.
Allow access to public message groups	The subscriber can create public message groups or send messages to public message groups.
Play receipt summary after all messages heard	The subscriber hears a summary after all messages have been heard.
E-mail	
Access e-mail messages from voice mail	The subscriber can retrieve e-mail messages using a phone and the e-mail integration feature.
	Count e-mail messages in message totals. The subscriber hears the total number of e-mail messages using a phone. The subscriber can change this setting using a phone, using the configuration menu.
	Ask for e-mail password. Specifies whether the subscriber must enter an e-mail password before listening to e-mail messages using a phone when using the e-mail integration feature. The subscriber still hears a count of e-mail messages, even without entering the e-mail password.
Forward voice mail to e-mail system	Allows the subscriber to automatically forward voice message to the subscriber's e-mail inbox. Available only with the e-mail integration feature.
	Message is deleted from system if not specifically set to keep new or old. Cannot be used Receive e-mail notification on new voice mail.
	Keep messages new on messaging system. Configures the system, after forwarding a voice message to the e-mail system, to retain a copy on the messaging system and announce it as a new message when the subscriber checks voice messages. This setting is only available if Forward voice mail to e-mail system is selected.
	Keep messages old on messaging system. Configures the system, after forwarding a voice message to the e-mail system, to retain a copy on the messaging system and mark it as an old message. This setting is only available if Forward voice mail to e-mail system is selected.

Forward faxes to the e-mail system	Enables the subscriber to automatically forward fax mail from the voice message inbox to the e-mail inbox when using the e-mail integration feature.
	Keep messages new on messaging system. Configures the system, after forwarding a fax message to the e-mail system, to retain a copy on the messaging system and announce it as a new message when the subscriber checks fax messages. This setting is only available if Forward faxes to e-mail system is selected.
	Keep messages old on messaging system. Configures the system, after forwarding a fax message to the e-mail system, to retain a copy on the messaging system and mark it as an old message. This setting is only available if Forward faxes to e-mail system is selected.
Receive e-mail notification on new fax/voice mail	Enables the subscriber to receive new voice and fax mail notification using e-mail when using the e-mail integration. Do not use this setting with Forward voice mail to e-mail system.
Allow user to change e-mail notification address	The subscriber can change the e-mail address where notification messages are sent.
	NOTE When this option is enabled, the e-mail tab appears on the Mailbox Manager user interface.
Receive e-mail notification of successful or failed faxes	The subscriber can receive a sent fax notification using e-mail when using the e-mail integration.

[1]Available in a multiple site networked messaging system environment.

Call Transfer Options

Table 2. Call Transfer Options Description

Field	Description
Enable call transfer	Turns call transfer on or off. • **Check for dial tone before transferring.** The messaging system listens for a dial tone before attempting to transfer the call. • **Transfer to subscriber's extension.** Select this setting to transfer calls to the extension specified on the subscriber profile page if transfer is enabled. • **Transfer to.** Accepts an alternate extension to transfer calls to if call transfer is enabled. **NOTE** Extension remapping may need to be configured in order for callers to be forwarded to the correct mailbox if the alternate extension is busy or unanswered.
Transfer type	Select the call transfer type to determine how the phone system and messaging system interact during the call transfer to the subscriber's extension. The following transfer types are available: • **Await Answer.** Puts the caller on hold and dials the extension. If answered within the number of rings specified in the Wait for … rings field, transfers the call to the extension. If the extension is busy or not answered, plays the greeting, then takes the action specified in the Action group of the page. • **Wait for ringback.** Puts the caller on hold and dials the extension. If busy, plays the greeting, then takes the action specified in the Action group of the page. If answered within the number of rings specified in the **Wait for … rings** field, transfers the call to the extension. If not answered within the number of rings, the call is released to the phone system. • **Release.** Puts the caller on hold, dials the extension and then releases the call. If the extension is busy or not answered, the caller cannot leave a message unless the phone system transfers the call using call forward to personal greeting.
Wait for … rings	Specify the number of times the extension rings before the call is recalled for await answer to greeting and action or for wait for ringback released. This applies only if the call transfer type is Await Answer or Wait for ring back. You must specify a minimum of three rings.

Allow holding	When this field is selected, callers can decide to hold, leave a message, or try another extension if the line is busy. This selection affects the messaging system only and not the phone system.
	Use VOX holding. When this field is selected, callers can decide to hold by speaking rather than entering a digit. This applies only if the call transfer type is Await Answer or Wait for ring back.

<table>
<tr><td colspan="2" align="center">Transfer/Screening options</td></tr>
<tr><td>Use customized prompt for Gather Account Number</td><td>Plays a custom prompt to caller when asking the caller to provide their account number before routing the call.

Click the button to record the custom prompt. A custom prompt has not been recorded if 00:00 appears on the button label. This applies only if Gather account number is select.</td></tr>
<tr><td>Use transfer/Use screening</td><td>Specifies whether the system is using the call transfer settings or the screening settings.</td></tr>
<tr><td>Gather phone number</td><td>Asks callers to provide a phone number before routing the call.</td></tr>
<tr><td>Gather account number</td><td>Asks callers to provide their account number before routing the call.</td></tr>
<tr><td>Announce transfer</td><td>Plays a beep before connecting the caller. With most phone systems, this setting lets the subscribers know exactly when the call is connected or that the call is from an external caller.</td></tr>
<tr><td>Confirm before transfer</td><td>Before the system transfers a call, the subscriber can decide to take the call. If the subscriber refuses the call, the system plays the appropriate greeting and takes the action specified in the **Action** field.</td></tr>
<tr><td>Introduce caller</td><td>The subscriber hears "Call for <subscriber's name>" before being connected to the caller. Use this setting when more than one subscriber uses the same phone.</td></tr>
<tr><td>Record caller's name</td><td>Asks callers to record their name. Before a call is transferred, the subscriber hears "Call from <caller's name>." If the subscriber rejects the call or is not available, the recorded name is not saved.</td></tr>
<tr><td>Record and save caller's name</td><td>Asks callers to record their name. Before the call is transferred, the subscriber hears "Call from <caller's name>."

If the subscriber rejects the call or is not available and the caller leaves a message, the caller's recorded name plays at the beginning of the message.

If the caller does not record a message, the subscriber receives the caller's recorded name alone as the message.</td></tr>
</table>

Greetings Options

Table 3. Greeting Options Description

Field	Description
Active Greeting	
Standard	Enables a standard greeting for the subscriber. When a standard greeting is selected, the following apply: <When subscriber's extension is busy>: • **"Busy Greeting enabled" Checked.** The Busy Greeting will be played. > NOTE The Busy Greeting may be enabled and disabled from **System** > **Configuration** > **Presence Greetings**. • **"Busy Greeting enabled" Unchecked.** If the subscriber does not have a presence greeting recorded and the Enable busy greeting field is not selected, callers hear "<Subscriber name> + <System recording for the selected presence>." If the subscriber recorded a personalized Standard Greeting, the personalized Standard Greeting will play.
Alternate Greeting	Enables the Alternate Greeting for the subscriber. When enabled, the Alternate Greeting will play regardless of the Presence Greeting or Busy Greeting selection. > NOTE The Alternate Greeting may be enabled and disabled from **System** > **Configuration** > **Presence** Greetings.
After Greeting	
Take a message	Records a message.
Take a message for group	Take a message for group. Records a message for the specified group. If selected, type the name of the group or click Search and select a group. > NOTE The name of the group cannot exceed ten characters or include numbers or spaces.
Route to operator	Routes the call to the system operator box.
Route to	Routes the call to another system ID. If selected, type the system ID or click Search and select a system ID.
Hang up	Disconnects without saying good‑bye.

Say bye	Plays a prompt asking if the caller needs further assistance, pauses to wait for the caller to make a selection, if there is no response, says good‑bye and disconnects.
Restart	Returns the call to the opening greeting box