

Lucent Technologies
Bell Labs Innovations



INTUITY Message Manager
Release 4.1
Getting Started

585-310-740
Comcode 107667750
Issue 1
January 1997

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Contents

About This Book	v
Purpose	v
Intended Audience	v
How This Book Is Organized	v
Conventions Used	vi
Related Documentation	vi

1 Introduction	1
Standard Features	1
Optional Features	2
Release 4.1 Enhancements	2

2 User's Installation Guide	3
Message Manager Installation	3
Upgrading to Message Manager Release 4.1	4
Installing Message Manager from Diskette	5
Installing the Fax Option from Diskette	6
Installing Message Manager from a LAN Server	7
Accessing a Shared Copy of Message Manager	9
Using the Automated Installation	11
Updating Your Site-Specific Information	11
Installing Additional Languages	11
Tutorial Installation	12

Contents

Installing the Tutorial from Diskette	12
Installing the Tutorial from a LAN Server	13
Remote Access	14

3	Administrator's Installation Guide	17
	Professional Services	17
	Pre-Installation Requirements	18
	PC Requirements	18
	LAN and AUDIX Server Requirements	19
	Installation Prerequisites	20
	Operating System Considerations	20
	Message Manager Installation	21
	Distributing Message Manager from a LAN Server	24
	Setting Up a Shared Copy of Message Manager on a Server	25
	Distributing the Tutorial from a LAN Server	26
	Automated Installation	27
	Troubleshooting Message Manager	28

4	User Overview	29
	Initial Activities	29
	Logging In	29
	Main Screen	30
	Toolbar	31
	Audio Palette	31

Contents

Folder List	32
Message List	33
New Message Notification	34
Status Panel	34
Basic Messaging	35
Play or View a Message	35
Reply to or Forward a Message	36
Call Using Directory Search	36
Create a New Message	36
Move or Delete Messages	38
Send Faxes	39
Fax From Other Applications	39
Use the Outgoing Folder	40
Other Features	40
Build Personal Phonebook	40
Build AUDIX Lists	40
Work Offline	41
Minimize or Lock Message Manager	41
Record Your Name or Greetings	41
Outcalling	42
Soundcard	42
Exiting Message Manager	42
Using Online Help	43

A	Site-Specific Information File	45
	Updating Your Site-Specific Information	45
	File Contents	46

Contents

IN Index

49

About This Book

Purpose

The Lucent Technologies *INTUITY™ Message Manager Release 4.1 Getting Started* (585-310-740) contains installation instructions and an introduction for users who are new to Message Manager.

Intended Audience

This book is intended for Message Manager users and system administrators who are ready to upgrade to or install Release 4.1. Readers should have a basic familiarity with Microsoft® Windows™ software and should know how to use windows, toolbars, dialog boxes, and pulldown menus. Readers should also know how to use AUDIX® messaging.

How This Book Is Organized

This document is organized as follows:

- Chapter 1, "Introduction", summarizes Message Manager features and Release 4.1 enhancements.
- Chapter 2, "User's Installation Guide", covers user procedures for installing the Message Manager software and tutorial. Remote access considerations are included.

- Chapter 3, "Administrator's Installation Guide", covers Message Manager installation prerequisites and the procedures for setting up Message Manager on a LAN file server.
- Chapter 4, "User Overview", describes how to log in, set up the program, complete basic messaging tasks, and use online help.
- Appendix A, "Site-Specific Information File", describes how to set up a text file that provides local information.
- A cross-referenced index appears at the end.

Conventions Used

This document uses the following conventions:

- Text that you type or enter appears in **bold** type.
- Screen names, field names, menu items, and keyboard keys have the first letter capitalized. For example: use the Page field in the Fax Viewer, select Print from the File menu, or press the Enter key.
- Screen buttons that you can select appear in **bold** type, such as the **OK** or **Cancel** button.

Related Documentation

The following information is also available:

- Message Manager works with the AUDIX messaging system through your telephone. Contact your system administrator to get a copy of the quick-reference or wallet cards used for the AUDIX telephone interface.
- Your AUDIX system administrator has a complete documentation library about Message Manager from the AUDIX server perspective. Refer to the DEFINITY AUDIX R3.1 or R3.2 library or the INTUITY R2, R3, or R4 library for planning, installation, administration, troubleshooting, or feature information.

Welcome to Lucent Technologies INTUITY™ Message Manager, a tool for handling your multimedia messages through the convenience of a personal computer (PC).

Message Manager allows you to access your AUDIX® messaging system visually through a local area network (LAN) connection. The AUDIX system is referred to as the "AUDIX server" when it connects to a LAN.

Standard Features

This Windows-based application provides the following features:

- Visual display of your AUDIX mailbox, with the ability to play or view any component, including voice, through a simple graphic interface.
- Display of multiple message summaries (headers), so you can access messages in any order you choose.
- Ongoing access to your messages, so you don't have to log in to the AUDIX system every time you want to see your messages.
- A Personal Phonebook for storing addresses and important information on your PC, independent of the AUDIX server.
- Soundcard support for playing and recording messages, greetings, and names on your PC.

- Remote, off-site access to your messages through a high-speed modem.
- On INTUITY™ AUDIX Release 4 servers only, the ability to receive, create, and send text messages and attached files.
- Ability to store (archive) messages on a separate storage device.

Optional Features

Message Manager offers the following optional features:

- Fax messaging, depending on the release and configuration of your AUDIX server. Users can receive, forward, delete, print, or create fax messages. See the "Fax Features" pop-up topic on the online help Contents page.
- Integration with a PassageWay® call-control application, allowing you to handle telephone calls through your PC. Search online help for "CTI".

Release 4.1 Enhancements

Message Manager Release 4.1 enhancements include:

- International language selections for the Message Manager screens and help system.
- Offline access to Message Manager. While logged off the AUDIX server, you can use your PC and soundcard system to play, view, and address old messages, as well as compose new messages. Then, you can log back in and send them later.
- Workbench folder, which holds messages that were composed offline or are not yet complete. If your AUDIX server connection times out, messages in progress are now saved to the Workbench instead of being deleted.
- Multiple Personal folders that you can name to help you manage your stored messages.
- The Document folder has been removed and fax use is simplified.

This chapter describes how users can install Message Manager and its tutorial either from diskette or through a LAN file server. Requirements for using Message Manager away from the office are also covered.

**NOTE:**

Pre-installation requirements and administrator procedures are covered in Chapter 3, "Administrator's Installation Guide".

Message Manager Installation

Before you install Message Manager, check with your LAN or AUDIX system administrator about the method of installation you should use. You can install Message Manager software in the following ways:

- **Diskette.** You can install a copy of Message Manager on your PC using the software diskettes. Diskettes include:
 - 4 Message Manager "basic" application diskettes (required, see "Installing Message Manager from Diskette" on page 5)
 - 1 or more sets of language diskettes, usually 1 diskette per language (one language required, more optional, see "Installing Message Manager from Diskette" on page 5)
 - 3 electronic tutorial diskettes (optional, see "Installing the Tutorial from Diskette" on page 12)

- 1 fax diskette (optional fax-creation software, see "Installing the Fax Option from Diskette" on page 6)
- **Copy from LAN Server.** You can install a copy of Message Manager on your PC by accessing the software through a LAN file server. This method allows administrators to easily distribute Message Manager through a LAN instead of passing around diskettes. See "Installing Message Manager from a LAN Server" on page 7.
- **Run from LAN Server.** All users on a LAN server share a single copy of Message Manager. Because the Message Manager software exists only on the LAN file server, it can be easily updated by the LAN administrator. See "Accessing a Shared Copy of Message Manager" on page 9.
- **Automated Installation.** You can start an automatic installation to load your computer with an entire set of application software, including Message Manager, as defined by your company. This method allows administrators to easily distribute a uniform set of user software to all computers. See "Using the Automated Installation" on page 11.

 **NOTE:**

Before installing Message Manager, review "Pre-Installation Requirements" on page 18.

After installing Message Manager, you can update the site-specific information file to create your own Message Manager quick reference. See "Updating Your Site-Specific Information" on page 11 for details.

Upgrading to Message Manager Release 4.1

To upgrade from an earlier release of Message Manager to Release 4.1:

- Exit Message Manager. The installation program will automatically exit if an earlier release is running.
- To save a copy of your current Message Manager software, enter a new directory name and program group when you install Release 4.1.

- Choose whether to convert your existing folders to the new release. If you convert them, the data in them can no longer be accessed by earlier releases of Message Manager. During installation:
 - If you do *not* convert your Document folder, Release 4.1 creates an empty Workbench directory. For example, you may want to make your Document folder a Personal folder instead, or still access faxes in it using an earlier version of Message Manager.
 - If you do *not* convert your Personal folder, you must set up new Personal folders in Release 4.1 under the main screen File menu.
- To later convert your Document or Personal folder data, either:
- Select the folder as one of your Release 4.1 Personal folders.
 - To continue using the data with earlier releases of Message Manager, first create new directories (using any DOS or Windows method you like), copy the data from the old folders into them, then select the new directories as one of your Release 4.1 Personal folders.

Installing Message Manager from Diskette

To install the basic Message Manager Release 4.1 software from diskette:

1. Turn on your PC and bring up Microsoft Windows (if not already up).



NOTE:

If you are upgrading from an earlier release, see "Upgrading to Message Manager Release 4.1" on page 4.

2. Insert the first Message Manager software diskette into the disk drive of your PC (for example, the a: drive).
3. Run the **Setup** program using any Windows method you like.
4. Select the directory in which to store the Message Manager software. The default is **C:\MSG_MGR**.
5. Select the program group to contain Message Manager icons. The default is **Message Manager**.

6. Select the **Continue** button.
7. Insert the remaining program diskettes when prompted, then select **OK**.
8. Insert the first language diskette when prompted, then select **OK**. Continue until all purchased languages are installed.



NOTE:

The first diskette you install is the default language (the language that appears when you first run Message Manager).

9. When the installation is complete, view the README file by selecting **Yes**, or return to Windows by selecting **No**.

You should always review the README file for last-minute changes that might affect your use of Message Manager.

Installing the Fax Option from Diskette

You must install the basic Message Manager software before you can install the fax software.



CAUTION:

Only the Release 4.1 fax-creation software works with Message Manager Release 4.1 software. Earlier versions of the fax software will not work with this release.

To install the optional fax-creation software from a diskette:

1. Insert the fax software diskette into the disk drive of your PC (for example, the a: drive).



CAUTION:

A PC client needs administrator privileges to install a print driver on Windows NT. See your LAN administrator for help.

2. Run the **Setup** program using any Windows method you like.
3. Install to the same directory that contains the rest of your Message Manager software. The default is **C:\MSG_MGR**.
4. Select the **Continue** button. The fax software loads.
5. The Message Manager Fax Setup screen appears. Enter the following:
 - **AUDIX Server ID**. This is the name or IP address of the fax-enabled AUDIX server you use to send or receive messages. See your LAN or system administrator for this information if needed.
 - **Mailbox Extension**. This is the extension number of the fax-enabled mailbox you'll be using to send and receive multimedia messages. This is usually the same number as your regular AUDIX mailbox. Users with secondary fax extensions should *not* enter that number here, but type their regular mailbox extension.
6. Select the **OK** button to add this information. If you select **Skip**, you can update these fields later using the Fax Options screen.
7. Select **Yes** to view fax-related information in the fax FREADME file. Select **No** to return to Windows.
8. Close all applications and restart your PC. The installation is complete.

Installing Message Manager from a LAN Server

Before installing a copy of Message Manager on your PC, check with your LAN administrator for the software's location.

To install your own copy of Message Manager from a LAN file server:

1. Log in to Windows and the network.
2. Access the network directory that contains the Message Manager software as follows:
 - Use the Map Network Drive screen in Windows 95 or the Connect Network Drive screen in File Manager.

- Select the appropriate drive and path to access the shared directory that contains the Message Manager software (such as **mmbasic**). See your LAN administrator for this information if needed.
 - When the correct directory is selected, choose **OK**.
3. Run the Message Manager **Setup** program from the network drive.
 4. Install the Message Manager software onto your own PC. You can either accept the default directory (**C:\MSG_MGR**) or choose a different location.
 5. You can use the default program group (**Message Manager**) or enter another name. This group will contain the program icons.
 6. Choose **Continue** to install the software. Message Manager installs the correct version for your PC's operating system.



NOTE:

Do *not* check the box for installing a shared copy on a LAN server.

7. When prompted to install a language, access the subdirectory for your preferred language.
 - Type or select the appropriate drive and path for the language software (such as **mmbasic\french**). See your LAN administrator for this information if needed.
 - When the correct directory is selected, choose **OK**.

To install the optional fax-creation software:

1. Access the network directory that contains a copy of the fax software (such as **mmfax**), then run the **Setup** program.
2. Install the fax software in the same directory that contains the rest of your Message Manager software. The default is **C:\MSG_MGR**.
3. Select the **Continue** button. The fax software loads.

4. The Message Manager Fax Setup screen appears. Answer the prompts for AUDIX Server ID (fax-enabled server name or IP address) and Mailbox Extension (your AUDIX mailbox number). See "Installing the Fax Option from Diskette" on page 6 for details.
5. Select the **OK** button to add this information. If you select **Skip**, you can update these fields later using the Fax Options screen. The installation is now complete.

Accessing a Shared Copy of Message Manager

To access a shared copy of Message Manager on a LAN file server:

1. Log in to Windows and the network.
2. Access the network directory that contains the Message Manager software as follows:
 - Use the Map Network Drive screen in Windows 95 or the Connect Network Drive screen in File Manager.



CAUTION:

You must map to the network drive in Windows 95 or Setup will not install properly. Do not simply access the network drive and run Setup.

- Check the "Reconnect at Startup" (or "Reconnect at logon") box. This allows you to reconnect to this drive automatically when you run Message Manager.
 - Select the appropriate drive and path to access the shared directory that contains the Message Manager software (default **MSG_MGR**). See your LAN administrator for this information if needed.
 - When the correct directory is selected, choose **OK**. The mapped directory files appear.
3. Run the **Setup** program from the Message Manager directory to create a data file in your working directory.

- At the directory prompt, type the name of the *working* directory you wish to store Message Manager files in (default **C:\MSG_MGR**).
 - Answer the program group prompt however you wish (default **Message Manager**). This group will contain the Message Manager icons. Select **Continue**.
4. When the installation is complete, view the README file by selecting **Yes**, or return to Windows by selecting **No**.
 5. To install the optional fax-creation software, access the network directory where the fax software is installed (for example, **inst_fax**).
Run the fax software **Setup** program. Answer the prompts as follows:
 - Specify the same working directory you used for the Message Manager software (for example, **C:\MSG_MGR**).
 - Answer the prompts for AUDIX Server ID (fax-enabled server name or IP address) and Mailbox Extension (your AUDIX mailbox number). See "Installing the Fax Option from Diskette" on page 6 for details.
 - Select the **OK** button to add this information, or select **Skip** to add it later using the Fax Options screen.
 6. *Optional:* To access a shared Message Manager Personal Phonebook (for example, if you share a database with other users):
 - Select the Phonebook icon from the Message Manager program group (the default group name is **Message Manager**).
 - Change the Properties to point to the network drive and directory where the shared Phonebook is located. The command line *must* end with a **/B** (for example, **m:\pbook /B**).
 7. *Optional:* Create message-storage folders on your computer:
 - *Workbench folder:* Message Manager creates a specific directory for Workbench messages. Search online help for "Workbench Folder".
 - *Personal folders:* You can create and select personal folder directories for storing messages. Search online help for "Personal Folder Properties".

8. You can now run Message Manager through the LAN. By checking the "Reconnect at Startup" box in Step 2, Message Manager is accessed automatically on the network drive.



NOTE:

Message Manager temporarily makes a copy of its software in your PC's memory when it is accessed, so shared-copy users might notice a slight delay when bringing up Message Manager over the LAN.

Using the Automated Installation

Your system administrator can customize an installation procedure that includes the Message Manager software. The procedure below assumes that your system administrator will distribute the software by CD-ROM. To load Message Manager using the automated installation:

1. Place the application CD-ROM in the drive.
2. Run the **Setup** program as directed by your system administrator.

Updating Your Site-Specific Information

Message Manager Release 4 and higher provides a **custom** file to help users remember site-specific information such as the AUDIX server ID, prefixes, text-addressing format, feature-access codes, and help numbers. To access the custom file, users select the Help/About Your System menu option on the Message Manager main screen. For more information about updating this file, see Appendix A, "Site-Specific Information File".

Installing Additional Languages

After Message Manager is installed, you can easily add more languages or reinstall a language as follows:

1. Run the basic Message Manager **Setup** program as if you were going to reinstall Message Manager (see the previous sections).

2. On the Message Manager Setup screen, specify the same directory and program group that the current version of Message Manager is using. Select **Continue**.
3. When prompted to install a language package, select **Yes**.
4. Insert (or browse and select) disk 1 of the language to install.
5. When finished, select **Yes** to install another language package, or select **No** to exit the Message Manager Setup program.

Tutorial Installation

The Message Manager Electronic Tutorial introduces new users to the Message Manager application through a hands-on approach. It covers the most frequently used Message Manager features in a series of lessons. You can access the lessons in any order, and you can save your place and return to the tutorial later. Instructions for using the tutorial are accessible from every screen. Installing and using the tutorial are optional.

NOTE:

At this time, the tutorial is available in English only.

To run the Message Manager tutorial, a separate copy must be installed on each user's PC. Make sure sufficient space is available (10 Mbytes per copy). At the present time, we recommend you do *not* run the tutorial from a network drive.

Installing the Tutorial from Diskette

To install the tutorial from diskette:

1. Turn on your PC and bring up Microsoft Windows.
2. Insert the first Electronic Tutorial software diskette into the disk drive of your PC (for example, the a: drive).

3. *Optional:* To customize the tutorial diskette with the AUDIX server ID and fax prefix for your system, run the **custom.exe** program using any Windows method you like.
 - In the customization screen, type your server ID and fax prefix (if any) over the default values shown in the window. Select **OK**.
 - You can now either distribute the tutorial diskettes to other users or continue with the installation.
4. Run the **Install** program using any Windows method you like.
5. When prompted, select the drive and directory in which to store the tutorial software (the default is **C:\MMTUTOR**). Select **OK**.
6. Insert the next diskette when prompted. Select the **OK** button.
7. When the installation is complete, double-click the Message Manager Tutorial icon to start the tutorial. The tutorial icons always appear in the default **Message Manager** program group.
8. Answer any prompts to continue. When the Main Menu appears, click the **About this Tutorial** button to find out how to use the tutorial.



Installing the Tutorial from a LAN Server

LAN administrators can distribute copies of the Message Manager tutorial from a LAN server instead of having each user install it from diskette. Check with your LAN administrator before installing the tutorial. The following steps are to be considered guidelines only.

To install the tutorial on your PC:

1. Log in to Windows and the network.
2. Access the network directory that contains the tutorial software using the normal procedures for your network.
3. Run the **Install** program from the network drive.
4. Install the tutorial onto your PC. You can either accept the default directory (**C:\MMTUTOR**) or choose your own location.



5. When the installation is complete, double-click the Message Manager Tutorial icon to start the tutorial. The tutorial icons always appear in the default **Message Manager** program group.

 **NOTE:**

You can run both Message Manager and the tutorial at the same time. Alternate between them using the Task Manager (Ctrl+Esc) or use Alt+Tab to cycle through your active applications.

6. *Optional:* To customize the installed tutorial with the AUDIX server ID and fax prefix for your system:
 - Run the Message Manager tutorial. Press Alt+F10 at any time.
 - In the customization screen, type your server ID and fax prefix (if any) over the default values shown in the window. Select **OK**.

Remote Access

Message Manager is normally run on a PC with a direct connection to your local area network. However, you can connect Message Manager to the server remotely using a modem if you are off-premises or cannot otherwise connect directly to the LAN.

 **NOTE:**

Remote access to Message Manager uses customer-provided products and setups. Lucent Technologies does not endorse any particular product, or guarantee that remote access will work in any given situation.

The following are recommended or suggested to support remote access:

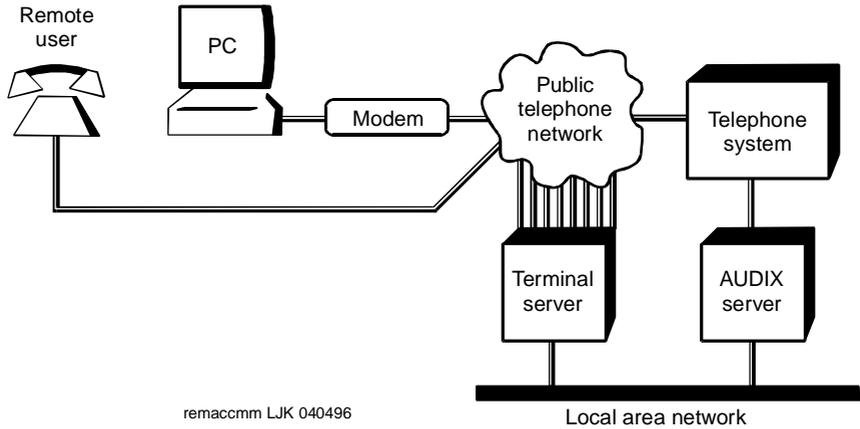
- The same PC, LAN, and AUDIX server requirements listed in "Pre-Installation Requirements" on page 18.
- Networking software that supports PPP or SLIP protocol.
- An internal or external modem (a minimum rate of 14,400 bps is required, but a 28,800 bps or faster modem is recommended).

- A type 16650 serial port (use the DOS **msd** command to check this). If a new serial port is needed for an external modem, the card should use a 16650 UART.
- At least one remote access port that provides PPP or SLIP entry onto the network (this could be a serial port on another computer with a direct network tap, or a dedicated terminal server that provides many ports).
- A switching system connected to the AUDIX server that allows direct access to the public telephone network.
- A remote location that provides one or two telephone lines:
 - One line to the modem is required for the data connection (needed to access or view messages or data)
 - A second line to a telephone allows you to record or play messages or greetings (not required for soundcard users, but needed by audio-connection users for full functionality)

**NOTE:**

The second (voice) line must allow direct inward dialing for an audio connection to work (no human attendants between the parties). This is not usually available, for example, in most hotels.

The following figure illustrates the remote-access feature. For complete steps for accessing Message Manager remotely, see the online help.



remaccmm LJK 040496

This chapter is written for the LAN and AUDIX system administrator. It describes Message Manager installation prerequisites and the procedures for setting up Message Manager on a LAN file server.

Professional Services

The Lucent Technologies Professional Services group provides varying degrees of consultative and implementation assistance for your LAN, PC, and telecommunication administrators. As a customer you may choose one of the professional service offers that provide you with a consultant at your business location. You may also choose to work with a consultant remotely (over the phone).

For details, pricing, and scheduling of these offers, or for pre-sale support, please contact your Lucent Technologies representative or Professional Services at one of the following numbers:

- In the United States, call 800-334-1096.
- In the Europe/Middle East/Africa region, call 32-2-727-9853.
- In the Asia Pacific region, call 91-80-331-6105.
- In Australia and New Zealand, call 61-2-9352-9022.
- In the Caribbean/Latin America region, either call 305-569-4740, fax requests to 305-569-4753, or for emergencies call 91-80-331-6105 or 6102.

Pre-Installation Requirements

Before you install Message Manager, verify that the following hardware and software is installed, and that your LAN is ready to support it.

PC Requirements

Verify you have the following minimum hardware and software:

- One of the following compatible operating systems:
 - Microsoft Windows Version 3.1 (or higher)
 - Windows for Workgroups Version 3.11 (or higher)
 - Windows NT Version 3.51 and Version 4.0
 - Windows 95
- Microsoft MS-DOS Version 5.0 or higher (to check your version, type **ver** at the MS-DOS prompt)
- Minimum of a 486, 33 MHz PC with 8 Mbytes of RAM and 8 Mbytes of available hard disk storage (assuming a Personal Phonebook with 400 entries). *Exceptions:*
 - Soundcard users must have a minimum of a 486, 66 MHz PC.
 - Each language requires an additional 1 to 2 Mbytes of disk storage.
 - The tutorial requires an additional 10 Mbytes of disk storage.
 - Your operating system may recommend additional RAM for better performance (for example, 16 Mbytes of RAM for Windows NT).
- VGA or higher monitor (color recommended)
- LAN interface card
- Windows Sockets (WINSOCK.DLL) access to TCP/IP (either through a NetWare Loadable Module or TCP/IP protocol stack)
- *Recommended:* Mouse supported by Microsoft Windows

- *Optional:* Speakerphone, telephone headset, or a Microsoft Windows-compatible soundcard with speakers, microphone, or a computer headset for hands-free operation

LAN and AUDIX Server Requirements

Requirements for the local area network (LAN) include:

- LAN configuration that provides TCP/IP transport between the AUDIX server and client PC (Ethernet networks such as the Novell NetWare 3.11 operating system have been tested)
- Ethernet network with valid physical connection: 10BaseT twisted-pair for a DEFINITY AUDIX server, and either 10BaseT, 10Base2 (thin coax), or 10Base5 (thick coax) for an INTUITY™ AUDIX server



NOTE:

Message Manager can communicate with a token ring network if a customer-provided router or other device converts token ring protocol to the required Ethernet protocol.

Currently the following servers support Message Manager Release 4.0 or later software:

- INTUITY AUDIX Release 4 (voice, fax, text, and attached files)
- INTUITY AUDIX Release 3.3 (voice and fax messaging)
- INTUITY AUDIX Release 3.2 (voice messaging only)
- DEFINITY AUDIX R3.1 and R3.2 (voice messaging only)

Some Message Manager features may not work well with AUDIX servers prior to AUDIX Release 3.3. For example:

- Outgoing folder entries may not display correctly on DEFINITY AUDIX or INTUITY AUDIX Release 3.2 servers.
- Subject-only messages are not handled well through the telephone interface prior to INTUITY AUDIX Release 4 servers. For example, an earlier AUDIX server may announce a voice message of 0 length.

- AUDIX Release 4 servers deliver as much of a message to a remote server as they can (for example, only the voice part if the recipient's server supports only voice). Earlier servers try to deliver the entire message; if they can't, message delivery fails.

Installation Prerequisites

Before you install Message Manager, make sure your PC and LAN are ready to support Message Manager as follows:

- On your PC, log into the network and bring up Microsoft Windows.
- Get a server name or TCP/IP address of a machine in your network from your LAN administrator, then run the ping program from a DOS prompt in Windows ("ping" the address or name). A ping from the DOS shell without Windows running is not a good test. Ask your LAN administrator how to access or use this utility if you need help.
- If the ping fails or the system hangs, install Message Manager, open File Manager, then open the Message Manager.HLP file. Search for "General Troubleshooting" for additional options.

NOTE:

If you install a shared copy of Message Manager for users to run on the LAN *and* copy Message Manager software to a LAN server for easy distribution, the executable Message Manager software and the copy of the software diskettes *must* be in different directories.

Operating System Considerations

The Message Manager Setup program automatically tailors Message Manager to work with the operating system installed on your PC.

Operating system considerations include:

- Message Manager runs as a 16-bit application on Windows 95 and Windows NT.
- Windows NT users who install the optional fax software must log in as an administrator in order to install a print driver.

- If you change operating systems, you must reinstall Message Manager. Also, if your PC is set up to run multiple operating systems (such as Windows NT and Windows 95), Message Manager must be installed separately for each operating system.

Message Manager Installation

You can install Message Manager software in any of the ways described in "Message Manager Installation" on page 3. This section describes only the procedures a LAN administrator needs to take. These methods include:

- Copying the Message Manager diskettes to a LAN file server
- Setting up a shared copy of Message Manager on a LAN file server
- Including Message Manager as part of an automated installation

The table below helps guide you in selecting the best method.

Install Method	Advantages	Disadvantages
Diskettes	1) Fast load for users with slow LAN connection (remote access).	1) Administrator cannot password-protect diskettes. 2) Requires diskette distribution at each update.
LAN distribution	1) Fast load for users with LAN connection. 2) Secure—directory can be password-protected. 3) No diskettes to manage. 4) Users easily updated if software changes.	1) Requires disk space on LAN server. 2) Increases network traffic during installation.

Install Method	Advantages	Disadvantages
Shared copy on LAN	1) Saves disk space on user's computers. 2) Secure—software can be password-protected. 3) No diskettes to manage. 4) Users easily updated if software changes.	1) Increases network traffic. 2) May have slower execution speed.
Automated installation	1) Simplest install for users. 2) Administrator resources required only initially. 3) Fast load for users with slow LAN connection (remote access).	1) System administrator must custom-build, load and distribute installation media. 2) Requires software media distribution at each update.

The following table summarizes Message Manager installation methods. Refer to the appropriate section after deciding how users at your site should install or access Message Manager.

Type	Who	What to Do	Result	See
Diskette	1. Each user (basic software and languages)	Run Setup, do <i>not</i> check the "shared copy" box	1 copy of MM on the user's PC	page 5
	2. Each user (<i>optional fax software</i>)	Run Setup, install to the same MM directory	1 fax-enabled copy of MM on user's PC	page 6

Type	Who	What to Do	Result	See
Copy of MM distributed through the LAN	1. LAN administrator	Copy the software diskettes to a LAN file server	1 copy of MM diskettes on LAN server	page 24
	2. Each user	Copy the software through the LAN and run Setup, do <i>not</i> check the "shared copy" box	1 copy of MM on the user's PC	page 7
Shared copy of MM on a LAN server	1. LAN administrator	Run Setup, <i>do</i> check the "shared copy" box	1 copy of MM on a LAN server	page 25
	2. Each user	Run Setup through the LAN (no "shared copy" box appears)	MM user data files only on each PC	page 9
<i>Shared MM Phonebook (optional)</i>	1. LAN administrator	Move the Phonebook files to a shared directory	Phonebook accessible by all users	page 26
	2. Each user	Make Phonebook icon point to the shared directory	shared Phonebook available	page 10
Automated	LAN administrator only	Update template.ini , include software on install media	MM installed without user intervention	page 27

Distributing Message Manager from a LAN Server

LAN administrators may copy the Message Manager diskettes to a LAN file server for easy distribution as follows:

1. *Novell server*: Have a drive letter mapped to the NetWare server that the Message Manager software is to be copied to.
2. Create a directory for the Message Manager software on the LAN server (for example, **mmbasic**). Copy *all* the basic-application diskettes to the same directory using any DOS or Windows copy method you like.



CAUTION:

Do not run Setup!

3. Create a *subdirectory* on the LAN server for each language (for example, **mmbasic\french**, **mmbasic\english**). Copy each language diskette to its respective directory using any DOS or Windows copy method you like.
4. If you ordered the fax software, create a *different* directory for it on the LAN server (for example, **mmfax**) and copy the software to it.
5. Give Message Manager users read-only permission to access the network drive and directories where the software is stored.
6. Update the **custom** file in the Message Manager directory (see Appendix A, "Site-Specific Information File").
7. Tell subscribers the software is available and how to access it.

Setting Up a Shared Copy of Message Manager on a Server

Generally, a LAN administrator should do the following to set up a shared copy of Message Manager on a LAN file server:

1. *Novell server:* Have a drive letter mapped to the NetWare server that the Message Manager software is to be installed on.
2. Run the Message Manager **Setup** program on the LAN file server. When the Message Manager Setup screen appears:
 - Specify the directory (default **C:\MSG_MGR**) and program group (default **Message Manager**).
 - Check the box for installing a shared copy of Message Manager on a LAN server.

 **NOTE:**

If you do not check the "shared copy" box, you will simply install a working version of Message Manager on the LAN file server.

3. Select **Continue**. The Setup program installs a shared copy of Message Manager in the directory you specified, and creates a modified Setup program for users to run through the LAN.
4. When prompted to install a language, select **Yes**. Insert (or browse and select) disk 1 of the language to install, then select **OK**.

 **NOTE:**

The first diskette you install is the default language (the language that appears when all users first run Message Manager).

5. When finished, select **Yes** to install another language package, or select **No** to exit the Message Manager Setup program.
6. If you ordered the optional fax software, insert the fax diskette and run the **Setup** program. Be sure to install the fax software in the *same* directory where you installed the Message Manager software.

If you checked the "shared copy" box in step 2, the Setup program creates an **inst_fax** directory. This directory contains a modified Setup program for fax users to run through the LAN.

7. Share the directory containing the Message Manager software. Allow read-only permission to protect the software.
8. *Optional:* If you wish to share the Message Manager Personal Phonebook (for example, if users access a common database):
 - Create a new directory for the Phonebook (such as **pbook**) that is *not* a subdirectory under the Message Manager directory. Share the new directory with full permissions so users can read and write to it.
 - If you already have a Phonebook you would like to share, copy the following files from the Message Manager directory to the new Phonebook directory: **pbook.ldb** and **pbook.mdb**.

 **NOTE:**

For a new Message Manager installation, these two files do not exist until the Phonebook is accessed and at least one entry made.

9. Update the **custom** file in the Message Manager directory (see Appendix A, "Site-Specific Information File").
10. Tell subscribers the software is available and how to access it.

Distributing the Tutorial from a LAN Server

LAN administrators can distribute copies of the Message Manager tutorial from a LAN server instead of having each user install it from diskette. The following steps are to be considered guidelines only.

Generally, a LAN administrator should:

1. *Novell server:* Have a drive letter mapped to the NetWare server so the Message Manager tutorial software can be copied to it.
2. Create a directory for the tutorial software on the network server. The directory name could be **mmtutor** or any other name.

3. Copy *all* tutorial diskettes into the same directory using a standard MS-DOS **copy** command or Windows method. Do *not* run Install!
4. Give Message Manager users permission to access the network drive or directory where the Message Manager tutorial software is stored (grant rights or permissions as needed).
5. Tell subscribers that the software is available and how to access it.

Automated Installation

LAN administrators can build a custom, automated installation of user application software that includes Message Manager, which reduces the time spent at each computer. The following steps are to be considered guidelines only.

Generally, a LAN administrator should:

1. Copy the Message Manager software to a working directory.
2. Using a text editor, open the **template.ini** file and update the following lines to fit your system's configuration:

```
[Main]
Destination=c:\MSG_MGR
ProgramGroup=Message Manager
LanInstall=No
FaxServer=servername
FaxExtension=5432
```

NOTE:

If fax software is part of the installation, update the **template.ini** file separately in each of the basic and fax software directories.

3. Copy the updated **template.ini** file and the program software to the installation media.
4. Distribute the installation media with instructions for its use.

5. To run an automated installation, use the following command for each of the basic and fax software installation procedures:

setup template.ini

Troubleshooting Message Manager

To troubleshoot problems with Message Manager including installation and equipment problems, fax setups, and error messages, search for "troubleshooting" in the online help.

Message Manager has a graphical user interface that simplifies messaging activities. This chapter describes logging into the AUDIX server to access your messages, using basic Message Manager features, and finding more information about those features.



NOTE:

Refer to the online help for complete information on using Message Manager (see "Using Online Help" on page 43 for details). Be sure to review the README file (and the FREADME file for fax users) when you begin using Message Manager.

Initial Activities

This section includes information that you need before actually using Message Manager to send or receive messages.

Logging In

Message Manager works closely with the AUDIX server, so most of Message Manager's functions require that you log in. To do this:



1. Double-click the Message Manager icon on your Windows desktop, or tab to it and press the Enter key on your keyboard.

2. In the AUDIX Login screen, complete the fields.

 **NOTE:**

If this is the first time you have logged in using Message Manager, refer to the Help/About Your System menu option for site-specific information. If this information is not accurate, check with your system administrator. See "Updating Your Site-Specific Information" on page 11 for more information.

3. Select the **Login** button to connect to the AUDIX server or the **Offline** button to work without a connection. For more information on working offline, see "Work Offline" on page 41.

 **NOTE:**

If you select **Login** and the password is entered incorrectly three times, the AUDIX server locks the mailbox to prevent unauthorized access. If this happens, ask your AUDIX system administrator to unlock your mailbox.

After scanning your AUDIX mailbox, the Message Manager main screen appears.

Main Screen

The Message Manager main screen contains the toolbar, the audio palette, the folder list, the message list and the status panel.

Toolbar

The main screen's toolbar allows one-button access to the most commonly used Message Manager features. This chapter contains a brief description of most of the features; you can find their procedures by searching online help for the toolbar button names listed below.



Create Message



Personal Greetings



Outcalling Notification



AUDIX Mailing Lists



AUDIX Directory



Personal Phonebook



Lock Message Manager



Reply to Sender



Forward Message



Call Sender



Move to Wastebasket



Edit Workbench Message



Empty Wastebasket

Audio Palette

The audio palette is used to play the audio component of a message. It becomes active when you select a message with an audio component. You can also fast forward, stop, or rewind the audio message or adjust the position, speed, and volume controls. The audio palette tools and their function are listed on the next page.

For more information on using the audio palette, search online help for "Audio Palette Controls."



Rewind to beginning



Rewind five seconds



Stop



Play



Forward five seconds



Forward to end



Position, Speed, and Volume Controls

Folder List

The folder list shows all available folders and their status. When a folder is selected, the icon becomes an open folder and the folder name is highlighted. The number of messages is displayed next to the folder name. Below is the name and a brief description of each folder.

New	New incoming messages. Search online help for "New Message Notification".
Unopened	New messages that were moved from the New folder or skipped while using the telephone interface.
Old	Messages moved from the New or Unopened folders or previously new messages recovered from the Wastebasket.
Outgoing	Status information for messages sent to others. Search online help for "Outgoing Folder".
File Cabinet	Copies of messages sent to others.
Workbench	Messages composed offline, that are incomplete, or that were in progress when the AUDIX server timed out. Search online help for "Workbench Folder".

- Personal** Messages copied from other folders for longer-term storage on your PC. You can name these folders with labels that best fit your method of organizing. Search online help for "Personal Folder".
- Wastebasket** Messages from other folders that are deleted upon your command to free space in your AUDIX mailbox. You can also restore messages to their original folders. Search online help for "Wastebasket".

The New, Unopened, Old, Outgoing, File Cabinet and Wastebasket folder messages are stored in your AUDIX mailbox and so will eventually be deleted by the server; the Workbench and Personal folder messages are stored on your PC and are deleted only by you. Workbench and Personal messages are available offline.

**NOTE:**

You can move messages to a Personal folder only if the system administrator has set up the AUDIX server to transfer messages over the LAN.

Message List

The message list displays detailed information about each message in a folder. It shows whether media components are attached, who sent the message and their extension (if the name and/or extension is recognized), the message subject if one was entered, the time and date the message was either sent or received, the message status, and the name of any attached files.

You can sort the messages in this list by clicking any column title, except Media. Another click sorts it in the opposite order. You can adjust the column width and screen size. Search online help for "Adjust Message Display".

New Message Notification

If you are logged in, Message Manager can notify you when new messages arrive in several ways. Notification occurs if the Message Manager screen is displayed, hidden behind another screen, minimized, or locked. Search online help for more information. The notification methods include:



- **Mailbox icon.** The flag is raised and a letter is in the mailbox. This icon appears at the lower left of the main screen or on your desktop if Message Manager is minimized or locked.
- **Popup window.** Displayed while you are using any Windows application. Activate this method by selecting the Options/New Message Alerting menu option on the main screen.



- **Outcalling Notification.** A feature in which the AUDIX server calls if you have new messages. This is the only method that can be used while working offline.

NOTE:

If you have a message-waiting light on your telephone, it also lights up when you receive new messages, regardless of whether Message Manager is running.

Status Panel

The status panel is displayed at the bottom the Message Manager screen, underneath the message list. It displays useful information about screen tools or the status of tasks you are completing. For example, as the cursor passes over buttons, the status panel displays the name of the button. Also, as the program dials your telephone so you can record a message, the connection's progress is displayed. Watch the panel as you work in Message Manager to learn more about using the program.

Basic Messaging

Message Manager simplifies messaging, whether you want to send, receive, reply to, or forward a message. This section describes commonly used messaging functions.

Play or View a Message

After selecting a folder, the messages stored within the folder are displayed and you can select one of the messages to play or view its contents. Click the message once to select it and the message component buttons are activated. Below are the component buttons and what happens after you click the activated button.



Voice. The message is played through an audio connection or the soundcard, depending on the selected option.



Fax. The Fax Viewer displays. You can read the fax on-screen or print its contents.



Text. The Text Viewer displays. You can read the text on-screen or print its contents.



Attached File. You can start (launch) the program and view the file or export the file to your own computer.

You can also double-click a message to play or view the first message component. Search for "Play a Message" or "View a Message" in online help for details.

If a folder contains no messages, the message list area is blank and most buttons are inactive (shown by an all-gray version of the button or menu option). If you have no messages and want to practice using Message Manager, call yourself using the telephone or send messages you create to your own extension.

Reply to or Forward a Message

After you have played or viewed a message, you may want to add your comments and respond to the sender or to send it to another AUDIX subscriber. Search online help for "Reply to Sender" or "Forward Message".



Reply to Sender. You can create a message to send back to the sender using automatic addressing. Include any or all of the original message components, plus any new components.



Forward. You can add your comments to the message you received, then send them and the original message to another AUDIX subscriber.

Call Using Directory Search



If you just want to call another AUDIX subscriber instead of creating a message, you can search the AUDIX server directory for their name or number. Select the AUDIX directory button, then enter the recipient's extension or name and press Enter. When their name is found, the **Call** button is activated. Click this button to make the call.

Search online help for "AUDIX Directory" for more information about this feature.

Create a New Message



You can create and send a message to one or many people, with one or more message components. The message is delivered as soon as possible or can be scheduled for a later time. Two key parts of new message creation are addressing and adding components.

Addressing

Select the Message Create button, click or tab to the Address field, then use one of the following addressing methods. You can send the message to just one person, a list of people, or to someone who has an electronic address on a remote system.

Text Entry Type most of the recipient's name or their complete extension, then press Enter. The AUDIX directory is searched for the subscriber. When found, the subscriber is added or a list of possible entries is displayed, from which you can select the correct entry.



**Personal
Phonebook**

Click the down arrow by the Personal Phonebook graphic. You can then add a recipient as described in online help under "Add Phonebook Entry to Address List".



AUDIX List

Click the down arrow by the AUDIX list graphic to display the Select List screen. You can select your own or another AUDIX subscriber's list, then add its member's addresses. Search online help for "Select List".

**Remote
Systems**

Type the recipient's electronic address, if you know it. Search online help for "Add AMIS Two-step Recipient" or "INTUITY AUDIX Mail Addresses".

Adding Components

Message Manager uses the same viewers to add message components as it does to play or view components. The process for each is described briefly below, and begins after you have clicked the component button on the Create Message screen:



Voice. The Record New Message screen displays. Message Manager uses your telephone or your soundcard and microphone. Listen for the beep, then start speaking. Click **OK** to accept and attach the voice component.



Fax. The Fax Viewer displays, with a list of faxes stored in the Workbench or Personal folders. Use the **View** button to see the fax or the **Select** button to attach the fax to your message.



Fax Cover. The Fax Cover Page screen displays. Write the cover information, then click **OK** to attach the component.



Text. The Text Viewer displays. Write the text message, then click **OK** to accept and attach the component.



Attached File. The Select File to Attach screen displays. Search for the correct file, then double-click it to attach the component.

Search online help for "Add Message Components".

Move or Delete Messages

In the AUDIX telephone interface, messages move automatically from one category to another (for example, from New to Old) after you access them. In Message Manager, messages remain in the folders until you move or delete them.

Move Messages. To move a message, select the appropriate message from the message list, then either:

- drag the message with the mouse to another folder *or*
- select the target folder name from the Move menu

Message Manager restricts movement between folders to those permitted in the AUDIX telephone interface. As you move messages, you will learn where messages can be moved. Search online help for "Move Messages".

Delete Messages. You will probably delete most messages immediately after viewing or playing them to free up space in your mailbox or PC. The mailbox space indicator at the lower left of the main screen shows how much space is left in your mailbox. Search online help for "Move to Wastebasket".

To delete a message, select it from the message list, then do one of the following:

- Drag the message to the Wastebasket folder
- Select the **Move to Wastebasket** button on the toolbar
- Press the Delete key



Messages in the Wastebasket folder are not actually deleted until you "empty" the wastebasket. Select the **Empty Wastebasket** button or select the Activity/Empty Wastebasket menu option.

Send Faxes

The optional fax software for Message Manager is used to create and send a new fax message. Creating a new fax is similar to printing a hard copy of your work in another program. After the fax is sent, you can use the Outgoing Folder to check the status of the fax.

Fax From Other Applications

Although faxes can be stored in and sent from Message Manager, creating and sending a new fax is actually done from any other Microsoft Windows application that allows printing. When you have finished work in the

application and are ready to send the file as a fax, follow the procedure in "Create a New Fax" in online help to select the correct printer, view the fax, address the message and send it.

Use the Outgoing Folder

After the message is sent, you can check its delivery status by opening the Outgoing Folder. The Outgoing folder lists all the messages you have sent, the time they were sent, and whether the recipient has received or accessed the message. In this folder, more delivery information is available by double-clicking a message or by highlighting a message and clicking the Delivery Report button. Search online help for "Outgoing Folder".

Other Features

Several other Message Manager features will also be useful after you've had a chance to familiarize yourself with the basic features. For more information, please check the online help for each topic.

Build Personal Phonebook



You can use the Personal Phonebook in Message Manager to store "cards" with the addresses of AUDIX subscribers, as well as other numbers and notes. After a subscriber is added to the Phonebook, you can quickly add them to an address list. The Personal Phonebook is stored on your PC and can be used while offline. Search online help for "Personal Phonebook".

Build AUDIX Lists



With AUDIX lists, you can store the addresses of sets of people to whom you want to send messages all at once, such as a project team or a department. You can quickly add the entire address list to a message. AUDIX lists are stored on the AUDIX server and are not available offline. Search online help for "AUDIX List Administration".

Work Offline

If you work away from the office, you may want to edit messages you have received or compose new messages, then later log in and send them during a single phone call. This saves toll charges and sometimes is just convenient, because an AUDIX server connection is not required. To use this feature, select the **Offline** button on the login screen. Search online help for "Offline Feature".

Minimize or Lock Message Manager

You can minimize Message Manager and still be notified of new messages throughout the day. Log in to Message Manager, then use standard Windows techniques to minimize the program and keep it active. Later, you can restore the program to retrieve messages or to create and send new messages.



For security reasons, Message Manager has a Lock feature. When you select the icon, the application is minimized and requires your AUDIX password to be restored. Locking Message Manager prevents others from accessing your AUDIX mailbox while you're away from your desk. This feature is inactive while you work offline.

Record Your Name or Greetings



When you install Message Manager, you can use your name and personal greeting that were recorded through the AUDIX telephone interface. However, you can select a menu option to record your name, or display a screen to record and manage greetings. The AUDIX server uses the choices you make in Message Manager for playing names or greetings to your mailbox callers. Search online help for "record message or name".

Outcalling



If you are away from the office, you can still be notified of new AUDIX messages. Use the Outcalling feature to enter a phone number that the AUDIX server will dial to notify you of new messages. Search online help for "Outcalling Notification".

Soundcard

Message Manager uses an audio connection to your telephone to play or record voice messages or greetings. However, you can use your computer's soundcard with speakers and a microphone instead. This is also the only way to play or record your voice messages while you work offline. Search online help for "Soundcard".

Exiting Message Manager

To exit Message Manager, use standard Windows techniques, or select Exit from the File menu. Message Manager erases messages marked for deletion and asks whether you want to save certain changes when you exit. You must exit Message Manager to change between working offline or logging in. Search online help for "Exit Message Manager".

Using Online Help

Although Message Manager is designed to be easy to use, you may need instructions or clarification on some of the features. The online help system provides detailed procedures and context-sensitive help as well as an extensive glossary. Online help features include:



Screen help. In any Message Manager screen, select the help button or press the **F1** key to receive detailed help about that screen or procedure.

Field help. When the cursor is in any text-entry field, pushbutton, or checkbox, press Alt-F1 on your keyboard (hold down the **Alt** key, then press **F1**). Detailed instructions for entering information appear.

Online help. Select Contents from the main screen Help menu to show the help system's table of contents, then use the internal jumps (underlined text) to see related topics. You can also select Search for Help On to search for a topic by keyword and go directly there, or use the browse buttons to page forward >> or back << within the help system.

Find+ utility. Use the Find+ feature to search for any word or phrase anywhere in the help system. Open Help, then choose **Find+** from the help system button bar or File menu. Search for any phrase. A list of topics containing that phrase appears in context, so you can make sure you've found the topic you really wish to see.

HyperViewer. Use the HyperViewer to locate help topics from a hierarchical view. When the help system is open, choose **HyperView** from the help system button bar or File menu. You can move from topic to topic, or select multiple topics for easy printing to create your own reference pages.

Refer to the online help system for details on these features or any Message Manager subject for which you want more information.

Site-Specific Information File

A

This appendix is targeted for the LAN and AUDIX system administrator. It describes the reasons and procedures for using the site-specific file. At the end of the chapter, a copy of the file contents are included so you can update or create your own file.

Updating Your Site-Specific Information

Message Manager Release 4 and later allows users or administrators to update a **custom** file with site-specific information such as the AUDIX server ID, prefixes, text-addressing format, feature-access codes, and help numbers. Users access the custom file by selecting About Your System from the Help menu on the Message Manager main screen.

To update the default **custom** file or supply your own quick-reference file:

1. Access the directory where you installed Message Manager.
2. Locate the default **custom.txt** file template automatically provided with Message Manager. To update this file:
 - Open the **custom.txt** file using any ASCII text editor.
 - Follow the instructions in the template and save the file.

3. To install your own custom file of a different type (such as .doc or .hlp):
 - Move or rename the default **custom.txt** file template.
 - Put your **custom** file in the same directory as the executable Message Manager **msg_mgr.exe** file. Your file *must* be named **custom**.



CAUTION:

If you use a file type other than .txt, you must have a computer application associated with that extension, or the custom file will not run.

Updating the custom file varies according to your installation setup:

- Users who share a copy of Message Manager on a LAN server all access the same custom file, either the default template or the system administrator's version. If the administrator later updates the custom file, all users automatically access the new version the next time they run Message Manager.
- Users who install their own copy of Message Manager on a PC from a LAN server initially get the custom file (either the default or the administrator's version) from the server. If this file is later updated, users must manually copy it from the server or reinstall Message Manager.
- Users who install Message Manager by diskette must update their custom files independently. The administrator may provide a modified custom file for users to copy into their application directory after installation (distributed on diskette, as an attached file, or through a LAN server). If you do this, include directions for users to rename or remove the old or default **custom.txt** file.

File Contents

Below is the contents of the text file, which is distributed in US English only. Type these lines into the file in your language, using any ASCII text editor, then distribute it to all Message Manager users.

Last Updated:

Updated by:

AUDIX Server Name:

IP Address:

Telephone number:

Languages available:

Prefix for printing or addressing faxes:

Prefixes for addressing networked subscribers by number:

Text addressing format:

Trusted server names:

Transfer Into AUDIX feature-access code (to transfer incoming fax calls to AUDIX):

Other useful feature-access codes (such as distinctive ringing or Send All Calls):

Message Manager help number:

AUDIX system administrator number:

LAN administrator number:

Index

A

access Message Manager remotely, 14
access messages, 35
add message components, 38
address messages, 37, 40
attached file component, 35
audio palette, 31
AUDIX
 directory, 36
 lists, 37, 40
 Login screen, 30
 password, 30
 server ID, 7
automated installation, 4, 11, 27

B

basic messaging, 35
buttons
 names, 34
 toolbar, 31

C

call from directory, 36
columns, adjust, 33
components
 fax, 39
 message, 35, 38
 text, 35
 voice, 31
context-sensitive help, 43

controls, audio, 31
create fax, 39
create message, 36, 41
custom file, 4, 11, 45

D

delete messages, 39
directory search, 36
diskette installation, 3, 5, 12
distribute software through the server, 7,
 13, 24, 26
Document folder, 5

E

enhancements to Message Manager, 2
exit Message Manager, 42

F

fax
 component, 35
 installation, 6
 send, 39
features in Message Manager, 1
features supported on AUDIX servers, 19
field help, 43
File Cabinet, 32
Find+ utility, 43
folders
 Document, 5
 File Cabinet, 32
 list, 32
 move messages, 38
 New, 32
 Old, 32

- Outgoing, 32, 40
- Personal, 5, 33
- Unopened, 32
- upgrade, 5
- Wastebasket, 33, 39
- Workbench, 5, 32

forward message, 36

FREADME file, 29

G

glossary, 43

greetings, 41

H

hardware requirements, 18

help, online, 43

HyperViewer, 43

I

installation

- advantages of different types, 21
- automated, 11, 27
- custom file, 11, 45
- fax, 6
- from diskette, 5, 12
- from the server, 7, 13, 24, 26
- languages, 6, 11, 18, 25
- operating systems, 18, 20
- PC requirements, 18
- prerequisites, 20
- server requirements, 19
- shared copy on server, 9, 25
- summary of types, 3, 21, 22
- troubleshooting, 28

- tutorial, 12

INTUITY AUDIX mail address, 37

L

LAN distribution of software, 7, 13, 24, 26

language installation, 6, 11, 18, 25

list administration, 40

lock Message Manager, 41

locked out of mailbox, 30

log in to Message Manager, 29

M

mailbox space indicator, 39

main screen

- adjust display, 33
- audio palette, 31
- elements, 30
- folder list, 32
- message list, 33
- status panel, 34
- toolbar, 31

Message Manager

- exit, 42
- features, 1
- installation, 3, 21
- log in, 29
- requirements, 18
- upgrade, 4

messages

- access, 35
- address, 37, 40
- components, 38
- create, 36, 39
- delete, 39
- delivery status, 40

- forward, 36
- list, 33
- move between folders, 38
- new, 32, 36
- offline, 41, 42
- play or view, 35
- reply, 36
- sort, 33
- undelete, 33

message-waiting light, 34

minimize Message Manager, 41

move messages between folders, 38

N

name, record or play, 41

New folder, 32

new message notification, 34, 42

new messages, 32, 36

O

offline, 2, 30, 40, 41, 42

off-site access, 14

Old folder, 32

online help, 43

operating systems, 18, 20

optional features, 2

outcalling notification, 34, 42

Outgoing folder, 32, 40

P

password, 30

PC requirements, 18

Personal folder, 2, 5, 33

personal greeting, 41

Personal Phonebook, 10, 37, 40

ping, 20

play message, 35

play messages offline, 42

pre-installation requirements, 18

Professional Services, 17

Q

quick reference file, 4, 11, 45

R

README file, 29

record messages offline, 42

record your name, 41

Release 4.1 enhancements, 2

remote access, 14

reply to message, 36

requirements, 18

S

screen help, 43

security, 41

send fax messages, 39

server

- documentation, vi
- features, 19
- installation, 4, 7, 9, 13, 24, 25, 26
- requirements, 19

shared copy of Message Manager, 9, 25

shared copy of Personal Phonebook, 10

site-specific information, 4, 11, 45

software requirements, 18

sort messages, 33

soundcard, 15, 18, 42

status of delivered messages, 40
status panel, 34
subscriber name, 41

T

TCP/IP, 20
text component, 35
toolbar, 31
troubleshoot Message Manager, 28
tutorial, 12, 18, 26

U

undelete messages, 33
Unopened folder, 32
upgrade Message Manager, 4

V

view message, 35
voice component, 35

W

Wastebasket folder, 33, 39
Workbench folder, 2, 5, 32