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## Octel 100 Implementation Worksheets

Attached is a set of worksheets designed to facilitate the overall implementation of the Octel 100 system at the customer site.

These worksheets include:

- **Customer Needs Worksheets** – Introduces the Octel 100 features and functionality and assists the representative with identifying the hardware and software necessary to build the type of auto attendant and voice/fax mail system best suited for the customer. These worksheets are designated by a CN before the page number.
- **Preinstallation Configuration Worksheets** – Helps determine which features should be activated on the Octel 100 system during installation and which, if any, can be set up before installation. These worksheets are designated by a PI before the page number.
- **System Configuration Record** – Provides the installer with a written transcript of how system setup screens are completed during the installation process and provides the installer with customer information that can be retained for future reference. These worksheets are designated by an SI before the page number.
- **Visual Mailbox Configuration Worksheets** – Help the installer successfully complete Visual Mailbox installation and configuration. These worksheets are designated by a VM before the page number.

Several of these worksheets should be completed by the system manager at the site before the authorized representative begins the implementation. This information then helps the authorized representative to set up and customize the system so that it best meets the customer's needs.

Prior to the implementation, the system manager should complete the following sheets:

- Customer Needs Worksheets:
  - Feature Selection Sheet
  - System Sizing Sheet
  - Phone Usage Sheet
- Preinstallation Configuration Worksheets:
  - Company Profile Sheet.
  - Call Flow Sheet
  - Single-Company Greetings Sheet or Multiple-Company Greetings Sheet
  - Attendant Menu Prompt Sheet
  - Call Queuing Prompts Sheet
  - Holiday Greetings Sheet
  - Class of Service Sheet
  - COS Redefinition Sheet
  - Custom COS Definition Sheet
  - Mailbox Assignment Sheet
  - Auto Forward Sheet
  - Message Notification Sheet
  - V-Tree Design Sheet

- Visual Mailbox Configuration Worksheets:
  - Visual Mailbox Implementation Configuration Worksheet

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The Prompt # and Mailbox # fields that display in *italics* on some worksheets will be completed by the installer when the system is implemented at the site.

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If Visual Mailbox is being implemented as part of the Octel 100 system installation, the Visual Mailbox Configuration Worksheets must be completed before system installation by the LAN Administrator at the customer site.

Once the implementation process is completed, all worksheets in this packet should be photocopied along with other information collected during the process and stored behind the Implementation Information tab in the *System Manager Manual*. The original worksheets should be retained by the authorized representative behind the Customer Information tab in the *Implementation and Service Manual*.

Note that the System Configuration Record and Site Contact Information Sheet are completed by the authorized representative after the system is fully implemented.

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## **Information Tools: Online Help and Implementation and Service Manual**

To most effectively use the information collected on the implementation worksheets, authorized representatives should refer to their *Implementation and Service Manuals*. Be advised that information contained in the *Implementation and Service Manual* is also available in online help, accessible from the Help menu on Octel 100 screens or by double-clicking the Help icon in the Octel folder.

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## **Warranty**

A limited warranty is provided on this product. Refer to your customer agreement for specific warranty information.

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**Notes:**

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# Feature Selection Sheet

Refer to the Feature and Functionality Introduction for information on each of the features listed below. Indicate on this sheet all features you feel are integral to meeting your system needs.

Note that, though many of the features listed below are standard on the messaging system, some are optional add-on modules and some are available only with certain types of phone systems and software release versions. Using the information you provide on this sheet, you and your authorized representative can discuss each feature, to ensure you understand its functionality and to identify any implementation implications.

**Company Name:** \_\_\_\_\_

## Automated Attendant Features:

- |   |   |
|---|---|
| <input type="checkbox"/> Call Blocking                  | <input type="checkbox"/> Extension Directory          |
| <input type="checkbox"/> Call Forwarding                | <input type="checkbox"/> Fax Tone Transfer            |
| <input type="checkbox"/> Call Queuing                   | <input type="checkbox"/> Greeting by Port             |
| <input type="checkbox"/> Call Screening <sup>s</sup>    | <input type="checkbox"/> Holiday/Time of Day Messages |
| <input type="checkbox"/> Intercom Paging <sup>s</sup>   | <input type="checkbox"/> Name Prompt on Transfer      |
| <input type="checkbox"/> Intercom Redirect <sup>s</sup> | <input type="checkbox"/> Multilingual Prompts         |

## Voice/Fax Mail Features:

- |   |  |
|---|--|
| <input type="checkbox"/> Visual Mailbox <sup>os</sup>                             | <input type="checkbox"/> Distribution Lists                          |
| <input type="checkbox"/> Default Operators  | <input type="checkbox"/> Integrated Telephone Answering <sup>s</sup> |
| <input type="checkbox"/> Busy and No Answer Greetings <sup>s</sup>                | <input type="checkbox"/> Network Message Forwarding <sup>os</sup>    |
| <input type="checkbox"/> Personalized Prompts                                     | <input type="checkbox"/> Online System Displays and Reports          |
| <input type="checkbox"/> Message Notification/Multiple Add. Delivery <sup>s</sup> | <input type="checkbox"/> Send Copy of Message                        |
| <input type="checkbox"/> Future Delivery  | <input type="checkbox"/> Transfer or Reply to Sender <sup>s</sup>    |
| <input type="checkbox"/> Message Confirmation                                     | <input type="checkbox"/> Voice Folders                               |
| <input type="checkbox"/> Message Sending Options                                  | <input type="checkbox"/> Guest Mailboxes                             |
| <input type="checkbox"/> Multiple Message Capability                              | <input type="checkbox"/> Receive-Only Mailboxes                      |
| <input type="checkbox"/> Sent Message Editing                                     | <input type="checkbox"/> Voice-Only Mailboxes                        |
| <input type="checkbox"/> Wake-up Messages <sup>s</sup>                            | <input type="checkbox"/> Password Protection                         |
| <input type="checkbox"/> Automatic Date Time                                      | <input type="checkbox"/> Forced Password Change                      |
| <input type="checkbox"/> Automatic Station Login and Password <sup>s</sup>        | <input type="checkbox"/> Fax Mail                                    |
| <input type="checkbox"/> Message Deletion Notification                            | <input type="checkbox"/> Personal Default Fax Number                 |
| <input type="checkbox"/> Message Information                                      | <input type="checkbox"/> Fax AutoPrint                               |
| <input type="checkbox"/> Message Rewind/Hold/Fast Forward                         | <input type="checkbox"/> Voice Message Cover Sheets                  |
| <input type="checkbox"/> Locate Messages  | <input type="checkbox"/> Interview V-Trees                           |
| <input type="checkbox"/> Message Speed and Volume Control                         | <input type="checkbox"/> Call Routing V-Trees                        |
| <input type="checkbox"/> Message Indicators <sup>s</sup>                          | <input type="checkbox"/> Information on Demand V-Trees               |
| <input type="checkbox"/> Saved Messages   | <input type="checkbox"/> AudioText                                   |
| <input type="checkbox"/> Recover Deleted Messages                                 | <input type="checkbox"/> Fax Retrieval                               |
| <input type="checkbox"/> Skip Messages  | <input type="checkbox"/> AMIS Interface Module <sup>os</sup>         |
| <input type="checkbox"/> Auto Forward   | <input type="checkbox"/> OctelNet <sup>os</sup>                      |

*The coding shown after some features (<sup>s</sup>, <sup>o</sup>, and <sup>os</sup>) is for vendor use.*

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**Notes:**

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## Feature and Functionality Introduction

The messaging system provides two general feature sets: an Automated Attendant (also known as Call Processing) and a messaging system. The Automated Attendant routes internal and external callers to phone extensions or subscriber voice mailboxes. The attendant feature includes a variety of options for controlling the exact conditions under which, and techniques with which, calls are addressed and moved throughout a company's phone system.

The system's Voice/Fax Mail features allow callers and subscribers to send and receive both voice and fax messages in system mailboxes. An array of available mail options put callers and subscribers in complete control of their communications.

You can choose to use either or both Automated Attendant and Voice/Fax Mail features when implementing a system. Note, however, that voice-mail only systems cannot transfer callers to extensions or to subscriber mailboxes. These tasks must be done by an operator if the Automated Attendant feature is not active.

Also note that though many of the features listed below are available with all systems, some are optional add-on modules and some are available only with certain types of phone systems. Consult your authorized representative for details.

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### Understanding Automated Attendant Capabilities

The system's Automated Attendant can be programmed easily to meet any organization's unique needs and preferences. While it is perfectly capable of answering all incoming calls, you may elect to have it handle only those the live operator is unable to take. This can include overflow calls during peak hours or calls that come in after hours, on weekends, or during holidays. The Automated Attendant assures that callers are never lost, forgotten on hold, or left listening to an unanswered phone's eternal ring.

The system's Automated Attendant saves money by controlling the number of people an organization must assign to call-answering duties and gives existing phone receptionists time to handle more important duties.

### Call Handling

The system provides flexible Call Handling options that can be easily customized to meet the exact needs of an organization.

#### Call Blocking

Call Blocking routes calls directly to a voice mailbox without ringing a phone. This feature helps to limit work interruptions, and callers are extended the courtesy of the quickest possible transfer.

#### Call Forwarding

Call Forwarding routes a call to ring an extension other than that originally entered. A subscriber can use this feature to have another subscriber handle important calls when the first is unavailable or to receive calls when in another subscriber's office. Call Forwarding improves customer service by ensuring that important incoming calls are handled personally.

#### Call Queuing

Call queuing allows callers to hold if an extension is busy. The system can be set up to periodically announce holding callers' positions in the queue and offer them options to leave a voice-mail message, speak to an operator or transfer to another extension. Prerecorded music or informative messages can be played to callers in queue. Since queuing reduces hang-ups by easing the discomfort callers experience on hold, it saves money by minimizing potentially expensive long-distance callbacks.

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## Call Screening

When Call Screening is activated, the system asks for the caller's name and announces it to the subscriber being phoned. The subscriber can accept or reject the call, or have it redirected to another extension. If the call is rejected, the system informs the caller there was no answer at the extension and offers options to leave a message, transfer to another extension, or speak with an operator. With Call Screening, subscribers can choose when they are to be interrupted, accepting important calls and redirecting those that can be handled later or by someone else.

## Intercom Paging

If the telephone system is equipped with a supported Intercom Paging feature, callers can be offered the option of paging a subscriber when there is no answer at an extension. After paging the subscriber, the system re-rings the extension to deliver the call. Intercom Paging helps assure that subscribers are made aware of incoming calls when they are in the office, but away from their phones.

## Intercom Redirect

Intercom Redirect gives subscribers with properly equipped telephone systems the ability to respond to an intercom page from any extension—not just their own. When subscribers are paged (*"There is a call for <subscriber's name>"*), they need only dial into the system from the nearest extension, enter their mailbox number, and enter the extension number of the telephone they are using. The system then routes the call to that extension. The mailbox owner's name prompt is automatically voiced when calls are transferred by intercom redirect, helping ensure the call is being transferred to the appropriate subscriber.

## Extension Directory

Callers who do not know the mailbox number of the subscriber or department they are trying to reach can press a specified key to access the system's employee or departmental directory. Callers transfer to subscriber extensions by entering the first few letters of the subscriber's last name on the phone keypad.

## Fax Tone Transfer

The system can transfer calls automatically to a fax machine when it detects a fax tone during the Automated Attendant's greeting.

## Greeting By Port

Different greetings can be designated for various system ports. In such scenarios, each port is totally partitioned from—and transparent to—the rest, ensuring independence regardless of system configuration, subscriber Call Handling selections, or directory use. Using greeting by port, several businesses in an office (or several divisions within a company) can share a single system.

## Holiday / Time of Day Programmable Messages

On select dates, the system can play holiday greetings to callers. Greetings can be prerecorded, covering up to 18 national, state, and/or local holidays. Personalized holiday greetings can be retained, allowing their re-use in subsequent years. The system can also answer calls with separate greetings for morning, afternoon, evening, and after hours.

## Name Prompt on Transfer

Name Prompt on Transfer is invaluable when two subscribers share a single phone or when a single subscriber performs more than one job. If this option is activated, the subscriber hears, *"There is a call for <subscriber's name>"* instead of, *"One moment, you have a call,"* when the auto attendant transfers calls. If, for example, the Automated Attendant says, *"For accounting, press 1; For customer billing, press 2..."*, and both actions ring the same extension, subscribers will be prompted as to which department's phone they are answering (for example, *"There is a call for accounting..."* or *"There is a call for billing..."*).

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## Multilingual Prompts

The system can be equipped with an optional module that allows it to offer callers and subscribers syntactically correct prompts in languages other than English. Language library modules include prerecorded phrase files and syntax tables custom designed for the selected language.

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## Understanding Voice/Fax Mail Features

By eliminating the need for the simultaneous presence of both parties when important information must be conveyed, voice mail maximizes the opportunity for every telephone call to communicate effectively. With voice mail, messages are never lost, garbled, or only partially delivered.

Systems equipped with fax boards allow subscribers to apply the same power to fax communications. By shifting control of the fax machine to its users, Fax Mail allows printed information to be more easily exchanged.

With voice mail and Fax Mail, information—both spoken and written—can be placed in a mailbox at any time, from any location, using standard Touch-Tone phones and fax machines. A subscriber's access to this information is the same any time, from any location, with just a telephone and a fax machine.

## Mailbox Interfaces

The system's mailbox interfaces allow subscribers to personalize, utilize, and easily maintain their mailboxes.

### Telephone Interface

With the telephone interface, subscribers use simple keystroke responses to system prompts to access full system functionality from any Touch-Tone phone.

### Visual Mailbox™

Visual Mailbox ties the subscriber's computer to the telephone, thus allowing the subscriber to take advantage of the features provided with each communication medium.

With Visual Mailbox, a glance at the monitor relays how many messages a subscriber has, who they are from, the day and time they were delivered, and their length. Icons indicate whether the messages are voice or fax (or voice *and* fax), their delivery type (Normal, Urgent, Private, etc.), and whether they have been forwarded by another subscriber. Space is provided for subscribers to add textual notes, helping them recognize and/or categorize their messages for future reference.

Subscribers can listen to, save, or delete messages by simply pointing and clicking the mouse. Icons indicate that messages have been saved or deleted—subscribers can change their mind at any time during the current session. Clicking a fax message activates the Fax Viewer, which allows subscribers to read, print, save, and/or export faxes. A unique fax rotation option allows subscribers to properly view faxes in both the portrait (standard letter) or landscape (spreadsheet) orientations.

To copy, forward, or broadcast a message, subscribers need only request a mailbox directory and click the name of the intended recipient or list of recipients.

Mouse-driven "tape deck" controls make recording messages and greetings simpler and more precise than ever. While recording, subscribers can pause, start over, or cancel the message, and an append button lets subscribers continue recording or add more to the end of a message. A confirmation message, similar to those provided by most e-mail packages, can be generated when messages that subscribers send are received.

A Call Handling screen provides a graphical interface with which subscribers can activate Call Blocking and pick specific handling options for incoming calls. Subscribers may, alternately, select handling options for ring-no-answer and busy conditions when their extension is not blocked.

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## Mailbox Personalization

The system provides a number of features that allow subscribers to personalize their mailboxes, making caller interactions comfortable.

### Mailbox Default Operators

The system manager can assign a different default operator to each mailbox on the system. When a caller presses <0> for an operator, the system transfers the caller to that mailbox's default operator instead of the regular operator. This allows separate departments or subscribers to have calls taken by their own receptionist when callers request an operator.

### Mailbox-Specific Busy and No Answer Greetings

The optional personal prompts, when activated, replace the standard system prompt telling callers that an extension is busy or that there is no answer. Unique (and frequently updated) busy and no answer greetings allow subscribers to further personalize their voice mailboxes.

### Personalized Prompts

Personalized voice prompts, in the subscriber's own voice and tone, inform callers immediately if they have reached the correct extension or mailbox. Available personalized prompts include the subscriber's name and directory listing, a please hold prompt, a personal greeting prompt, and two optional prompts.

## Leaving Messages

A large percentage of voice information management technology's success lies in the ease with which it allows its users to leave messages for each other.

### Message Notification / Multiple Address Message Delivery

The system can dial up to eight different telephone or beeper numbers when messages are received in a mailbox. Subscribers select the days and time frames they want to be notified (for example, Monday through Friday, 10:00 AM to 8:00 PM), and the number at which they want to be called. They can also choose whether they want to be notified upon receipt of all messages or only when their callers have marked their messages "urgent."

When subscribers are not sure where they will be, the system can be set to call a series of numbers sequentially. This capability, called cascade outcalling, can be a particularly valuable communication tool for companies with subscribers who work outside the office.

### Future Delivery

Subscribers can place a message in the system to be delivered to themselves or another subscriber at any time, on any specified date, up to a year in advance.

### Message Confirmation

Message Confirmation allows subscribers to check the date and time a message sent to another subscriber was received. When subscribers request message confirmation, the system announces the recipient's name, the date and time the subscriber sent the message, and the date and time the message was received, as well as the duration of the message.

### Message Sending Options

Subscribers can assign conditions to voice and fax messages they leave in another subscriber's mailbox, restricting or prioritizing their handling. Messages to local subscribers can be marked "Normal," "Listen-Only," "Private," or "Urgent."

Voice messages marked "Listen-Only" cannot be saved, skipped, or transferred—only listened to and deleted. This capability provides extra security and reduces demand on the system's message file memory space.

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Messages marked "Private" cannot be forwarded or copied by the recipient. This measure helps assure confidentiality.

Both outside callers and subscribers have the option of marking their messages "Urgent." "Urgent" messages are placed at the top of the subscriber's new message queue and are always voiced first.

### **Multiple Message Capability**

Callers who want to leave messages for more than one subscriber may do so without redialing.

### **Sent Message Editing**

As long as a subscriber receiving a message has not listened to or skipped the message, the sending subscriber can delete, rerecord, review, or append additional information to a previously sent message.

### **Wake-Up Messages**

The system can be programmed to deliver wake-up calls at any time, to any phone number. Once called, subscribers may reschedule the wake-up, with options to retain or change the time and phone number.

## **Message Retrieval**

The system provides an assortment of features that pertain to retrieving and listening to messages.

### **Automatic Date and Time**

The system can be set to voice automatically the day and time each message was received when subscribers listen to messages.

### **Automatic Station Login and Password**

If the phone system is so equipped, subscribers can save time by directly accessing their mailbox when calling from their own extensions. While the use of password security is highly recommended, the system can also be configured to allow subscribers to access their mailboxes without entering their passwords when they call from their own extensions.

### **Message Deletion Notification**

Saved messages are deleted automatically when they remain in subscribers' mailboxes for the maximum number of days the system manager has specified. When message deletion notification is enabled, the system will alert subscribers before it deletes expired saved messages. This keeps subscribers from inadvertently losing important information when expired messages are deleted.

### **Message Information**

Message information provides the date and time a message was received, the length of the message and, if it was sent by another subscriber, that person's name.

### **Message Rewind / Hold / Fast Forward**

Subscribers can rewind, pause, or skip ahead in a message being played. These functions improve productivity by helping subscribers harvest the important information from messages as quickly and easily as possible.

### **Message Scanning**

Subscribers can scan their mailboxes for new messages from a particular subscriber. Other messages are skipped for later review.

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## **Message Speed and Volume Control**

Depending on the voice boards, Touch-Tone commands can allow subscribers to increase the speed and/or volume of messages upon playback. The caller's original pitch is maintained, even when message speed is altered.

## **Message Indicators**

Depending on the type of phone system, the system can notify subscribers when voice or fax messages are placed in their mailboxes. If the phone has a message indicator, a glance provides visual notification that a message is waiting. Otherwise, the system can be programmed to ring the subscriber's extension periodically when messages are waiting.

## **Saved Messages**

Subscribers can save new voice and fax messages for reference at a later time, helping assure their content is preserved and fully understood.

## **Recover Deleted Messages**

Subscribers can recover messages they accidentally delete during the current call. Upon request, the system plays back all messages deleted during that call. Subscribers can press <1> to restore the message to the queue from which it came (new or saved) or <2> to leave the message deleted.

## **Skip Messages**

A subscriber can skip a message while listening to it, leaving it in the new message queue to review later. This allows subscribers to conserve time by listening only to messages they need at the moment, saving personal or other non-critical messages for review when time permits.

## **Message Management**

The system's message management functions help subscribers digest, store, and disseminate information with unprecedented efficiency.

## **Auto Forward**

The system manager can have messages that have not been listened to within a specified time automatically forwarded to a preselected mailbox. This feature helps to ensure prompt action, an absolute necessity in efficient customer service.

## **Distribution Lists**

Subscribers can send the same voice or fax message to a number of subscribers with a single call. Distribution Lists can contain any combination of destination mailboxes (local and/or networked) or other Distribution Lists. Subscribers can also use global Distribution Lists to reach every mailbox in a company or division.

## **Integrated Telephone Answering**

When one subscriber leaves a voice-mail message for another subscriber, the second subscriber can reply to the message or transfer to the subscriber who left the message with one or two keypresses.

## **Network Message Forwarding**

With Network Message Forwarding (also known as Follow-Me-Forward) subscribers on systems equipped with the optional Network Interface Module can elect to have messages received in their mailboxes automatically forwarded to a destination mailbox on another (Network-equipped) system. By centralizing messages in a single mailbox, network message forwarding helps busy subscribers eliminate the need to check mailboxes on multiple voice-mail systems.

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## Online System Displays and Reports

Data on the usage of all mailboxes is recorded and made available to the system manager through a selection of system displays and reports. Online system displays and reports, including port contention, mailbox status, and hourly statistics, can be viewed onscreen, saved to disk, or printed.

## Send Copy of Message

Subscribers can send a copy of a message they receive to one or more subscribers or network destinations, and preface the message with comments. Subscribers can access directories directly from their mailboxes if they do not know the extensions of other subscribers to whom they want to direct the message.

## Transfer or Reply to Sender

When subscribers receive voice-mail messages from other subscribers, they can either transfer to the sender's extension or send a reply message with just one keypress.

## Folders

Subscribers can create up to nine folders in their mailboxes to organize saved voice and fax messages. Voice folders can, for example, be created for individual callers, projects, or dates. Messages received on these topics can then be saved in the appropriate folder. When subscribers create new folders, they are prompted to record a descriptive folder label. This label is voiced each time they choose the folder. The system is also equipped to play for the subscriber a directory of all currently defined folders.

## Specialty Mailboxes

The system supports the creation and maintenance of several types of specialty mailboxes for unique business needs.

### Guest Mailboxes

Visitors, clients, and VIPs can be granted limited access to system features temporarily with guest mailboxes. Guest mailboxes improve the ability to work with important outside contacts.

### Receive-Only Mailboxes

Receive only mailboxes can be set up to collect information such as names, addresses, and phone numbers from individuals who call the company. This feature can serve as an important aid to customer service and/or marketing, by allowing representatives to address inquiries in the most timely and efficient manner possible.

### Voice-Only Mailboxes

A system manager can set up announcement mailboxes that play prerecorded voice information to callers. Voice only mailboxes are beneficial in advertising, marketing, public relations, and many other "call for more information" applications.

## Mailbox Security

A carefully designed array of mailbox security features protect the system and the information it contains.

### Password Protection

Individuals can access voice and fax messages in mailboxes only after entering a user-defined password. For additional security, the system manager can impose a minimum password length default. The system can also be set to require subscribers to press the <#> key after entering a password.

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## **Forced Password Change**

Subscribers can be forced to change their passwords at system-manager-selected intervals. When a subscriber changes a password (either voluntarily or due to the forced change feature), the system will not accept a new password that matches the current password.

## **Mailbox Passwords**

When creating mailboxes, the system manager can either enter a default password or have the system generate random passwords for each new mailbox.

## **V-Tree Password**

The system can be programmed to require users to correctly enter a password (up to 11 characters) to progress from level to level within custom applications generated using V-Trees. Placing password security at strategic levels within V-Trees, gives callers measured access to custom applications. For additional information on the V-Tree feature, refer to V-Trees, below.

## **Fax Solution Fax Mail**

### **Fax Mail**

Subscribers can receive faxes regardless of the state of the fax machine—whether it's busy, out of paper, or even out of order. Like voice messages, a subscriber can retrieve faxes in their mailbox at their convenience. When in the office, a subscriber can make a single keypress to direct the fax messages to the default fax machine. Faxes retrieved through Visual Mailbox can also be directed to print on a printer attached to the subscriber's PC. When out of the office, the subscriber can enter the telephone number of the nearest fax machine and receive fax messages immediately, regardless of location, time of day, time zone, etc. The system manager can set FaxComm hardcopies to include a cover sheet, indicating the receiving subscriber's name or extension number, division, and company name.

Access to fax communications is password-protected, and hardcopies of faxed communications are only produced when a subscriber requests them.

### **Personal Default Fax Number**

Subscribers who receive Fax Mail can specify fax machine numbers that override the system default. A single keypress directs faxes to a departmental (or personal) machine.

### **Fax AutoPrint**

Subscribers with Fax Mail may elect to have all new faxes sent directly to a fax machine (either system or personal default). In situations where security is less of an issue than speed and accessibility, fax AutoPrint can significantly enhance productivity.

### **Voice Message Cover Sheets**

Senders can preface their FaxComm faxes with voice messages, which is faster, more effective, and less expensive than the traditional cover sheet.

## **V-Trees**

Tools provided with the system allow system managers and subscribers to build unique menus called V-Trees within mailboxes on the system. A V-Tree in a mailbox can perform functions similar to those that the Automated Attendant performs on a system-wide basis—the V-Tree can route calls reaching the mailbox to different extensions or mailboxes, prompt the caller to answer a series of questions, voice information (such as product information) to the caller, even fax information to the caller—all depending on the caller's keypress selections. When you create a V-Tree, you record prompts for the V-Tree that voice all the options available to callers when they reach the V-Tree.

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V-Trees can significantly reduce the time employees spend performing basic, repetitive tasks. A simple V-Tree can, for example, provide callers with options to obtain answers to common product questions, transfer callers to a specific department in the company, or leave product orders. On systems with installed fax boards, you can set up a V-Tree to automatically fax certain documents to callers who request them.

### **Interview V-Trees (Forms Filler V-Trees)**

An interview-oriented V-Tree requests and collects information from callers. This type of V-Tree can survey for customer satisfaction, for example, requesting callers' names, the products and/or services they use, their impressions of the products, and their suggestions for improvements. All responses to an interview V-Tree are grouped in a single message for playback by the mailbox owner.

### **Call Routing V-Trees**

A call-routing-oriented V-Tree provides callers with easy touch-tone phone access to any department or subscriber in the company. By giving callers quick, simple, and unassisted access to the exact subscriber or department they need in a given situation, call routing can be the heart of a number of productivity- and customer service-enhancing V-Trees.

### **Information-on-Demand V-Trees**

An information-on-demand-oriented V-Tree provides multilevel menus of information in a mailbox. These menus can give callers access to spoken (audiotext) and written (Fax Retrieval) information, 24 hours a day. Information-on-demand can significantly reduce the time personnel spend answering routine questions.

#### **Audiotext**

Audiotext gives callers answers to frequently asked questions without requiring the intervention of busy employees. Prerecorded messages placed in the system can, for example, give callers directions to the company's office or information on special sales promotions. Such information can be placed in easily updated announcements, accessible 24 hours a day. Audiotext boosts productivity while improving customer service by providing callers with Touch-Tone access to frequently requested information. Callers get the facts they need quickly, and employees are free to handle more valuable tasks with fewer interruptions.

#### **Fax Retrieval**

With Fax Retrieval, the company, its departments, or even individual subscribers can offer callers the opportunity to request and receive faxed copies of documents stored in the system. Once requested (via the keypad), documents are transmitted automatically, any time of day or night, to the fax machine of the caller's choice. Frequently requested documents, such as credit applications or order forms, are ideal candidates for Fax Retrieval. Other productivity-enhancing possibilities include customer service documents, maps, legal documents, and sales promotions.

## **V-Tree Generation Interfaces**

The system offers graphical and non-graphical V-Tree generation tools:

### **Generation with Visual V-Tree™ or Visual Architect™**

Visual V-Tree and Visual Architect are graphical interfaces for creating V-Trees in system and subscriber mailboxes. By incorporating today's most effective software tools, like drop-down menus, toolbars, and point-and-click mouse operations, Visual V-Tree and Visual Architect make it extremely easy for system managers to build intricate V-Trees. Prompts to accompany the V-Tree can be recorded using V-Edit™, the system's powerful integrated voice editor.

### **Generation with the Telephone Interface**

Subscribers can create custom V-Trees for their own mailboxes, using the system's telephone V-Tree capabilities.

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## Enterprise-wide Communications

### **AMIS Interface Module (AIM™)**

Using the internationally recognized Audio Messaging Interchange Specification (AMIS), the optional AMIS Interface Module allows the system to exchange voice information with AMIS-compatible voice-processing systems in satellite offices, vendor locations, or other remote sites.

Using AMIS's administered networking capabilities, the system manager can assign a node number to each of the AMIS-compliant systems with which messages will be exchanged. The node number serves as a code that represents the complete phone number one must traditionally dial to access the remote system. When remote sites have assigned node numbers, subscriber's who want to send messages to mailboxes at those sites must enter only the node number and the destination mailbox number.

### **OctelNet™**

Similar in nature to the AMIS Interface Module, the optional OctelNet module allows the system to exchange voice information with other OctelNet-compatible voice processing systems in satellite, offices, vendor locations, and other remote sites. Unlike AMIS, however, OctelNet provides subscribers communicating with remote systems with access to all the message processing options (except Fax Mail) normally available during inter-site communication, such as message confirmation, dial by name, and more. As with AMIS's administered networking capabilities, subscribers using OctelNet need only enter node numbers and destination mailbox numbers when sending messages to remote systems.

# System Sizing Sheet

Starting in the left-most column, list each typical group of messaging system users (subscribers); the highest number of people you project will be in each group over the next 24 months (if more than one company or unique organization will be sharing the messaging system, include information to cover *all* companies and organizations); the estimated average daily minutes of direct and indirect mailbox usage for each subscriber group; and the average number of messages stored, message length, number of faxes stored, and pages in each fax.

**Use the averages shown in the example at the bottom of the page as a guideline.** "Direct" mailbox usage includes all time that the subscriber spends accessing the system. "Indirect" includes all time callers to the subscriber spend accessing the system and all time that the system spends servicing the subscriber. To ensure proper system sizing, classify *each* potential system subscriber over the next 24 months into one of the Subscriber groups you list. Your authorized representative will complete the fields in *italics*.

Group of <u>Subscriber</u>	Highest No. in <u>Group</u>	Average Daily Minutes of Usage		Leave Blank for Vendor Use		Avg. No. of Msgs <u>Stored</u>	Avg. Lgth. of a Msg. <u>(Seconds)</u>	Avg. No. of Faxes <u>Stored</u>	Avg. No. of Pages <u>per Fax</u>	Leave Blank for Vendor Use	
		<u>Direct</u>	<u>Indirect</u>	1	2					3	4
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
<b>Totals:</b>	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____

**Weighted Average Minutes/Day/Mailbox:** \_\_\_\_\_ **Minutes of Disk Space Storage Required:** \_\_\_\_\_ **Minimum Total Megabytes Required:** \_\_\_\_\_

**Example:**

Group of <u>Subscriber</u>	Highest No. in <u>Group</u>	Average Daily Minutes of Usage		Leave Blank for Vendor Use		Avg. No. of Msgs <u>Stored</u>	Avg. Lgth. of a Msg. <u>(Seconds)</u>	Avg. No. of Faxes <u>Stored</u>	Avg. No. of Pages <u>Per Fax</u>	Leave Blank for Vendor Use	
		<u>Direct</u>	<u>Indirect</u>	1	2					3	4
Executive	_____	5	2	_____	_____	6	45	8	10	_____	_____
Manager	_____	6	4	_____	_____	6	30	5	8	_____	_____
Gen. Professional	_____	4	2	_____	_____	5	30	5	5	_____	_____
Service Tech.	_____	5	0	_____	_____	7	20	4	3	_____	_____
Order Entry Clerk	_____	2	8	_____	_____	5	30	2	2	_____	_____
Other Clerks	_____	2	1	_____	_____	3	30	2	2	_____	_____
Secretary	_____	3	1	_____	_____	2	30	3	4	_____	_____

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**Notes:**

# Phone Usage Sheet

Use this sheet to provide information on the average number of internal and external calls your phone system processes.

Complete either the top or bottom portion of this sheet, depending on whether actual phone statistics are available. If more than one company or unique organization will be sharing the system, include information to cover all companies. Your authorized representative will complete the fields in *italics*.

Whether providing statistical information or formulating estimates, do not include or consider statistics for days the company experiences substantially lower call volume, such as days the company is typically closed (weekends, for example). By including statistics for these days, you will lower call volume averages calculated to determine the hardware your system will require.

**If phone system statistics are kept, complete the following table:**

			Average Number of Calls						
			Mon	Tue	Wed	Thur	Fri	Sat	Sun
<b>Midnight</b>	-	<b>1:00 AM</b>	_____	_____	_____	_____	_____	_____	_____
<b>01:00</b>	-	<b>02:00 AM</b>	_____	_____	_____	_____	_____	_____	_____
<b>02:00</b>	-	<b>03:00 AM</b>	_____	_____	_____	_____	_____	_____	_____
<b>03:00</b>	-	<b>04:00 AM</b>	_____	_____	_____	_____	_____	_____	_____
<b>04:00</b>	-	<b>05:00 AM</b>	_____	_____	_____	_____	_____	_____	_____
<b>05:00</b>	-	<b>06:00 AM</b>	_____	_____	_____	_____	_____	_____	_____
<b>06:00</b>	-	<b>07:00 AM</b>	_____	_____	_____	_____	_____	_____	_____
<b>07:00</b>	-	<b>08:00 AM</b>	_____	_____	_____	_____	_____	_____	_____
<b>08:00</b>	-	<b>09:00 AM</b>	_____	_____	_____	_____	_____	_____	_____
<b>09:00</b>	-	<b>10:00 AM</b>	_____	_____	_____	_____	_____	_____	_____
<b>10:00</b>	-	<b>11:00 AM</b>	_____	_____	_____	_____	_____	_____	_____
<b>11:00</b>	-	<b>Noon</b>	_____	_____	_____	_____	_____	_____	_____
<b>Noon</b>	-	<b>01:00 PM</b>	_____	_____	_____	_____	_____	_____	_____
<b>01:00</b>	-	<b>02:00 PM</b>	_____	_____	_____	_____	_____	_____	_____
<b>02:00</b>	-	<b>03:00 PM</b>	_____	_____	_____	_____	_____	_____	_____
<b>03:00</b>	-	<b>04:00 PM</b>	_____	_____	_____	_____	_____	_____	_____
<b>04:00</b>	-	<b>05:00 PM</b>	_____	_____	_____	_____	_____	_____	_____
<b>05:00</b>	-	<b>06:00 PM</b>	_____	_____	_____	_____	_____	_____	_____
<b>06:00</b>	-	<b>07:00 PM</b>	_____	_____	_____	_____	_____	_____	_____
<b>07:00</b>	-	<b>08:00 PM</b>	_____	_____	_____	_____	_____	_____	_____
<b>08:00</b>	-	<b>09:00 PM</b>	_____	_____	_____	_____	_____	_____	_____
<b>09:00</b>	-	<b>10:00 PM</b>	_____	_____	_____	_____	_____	_____	_____
<b>10:00</b>	-	<b>11:00 PM</b>	_____	_____	_____	_____	_____	_____	_____
<b>11:00</b>	-	<b>Midnight</b>	_____	_____	_____	_____	_____	_____	_____
		<b>Totals:</b>	_____	_____	_____	_____	_____	_____	_____

*Sum of Totals:* \_\_\_\_\_

*Avg. No. of Calls per Business Day:* \_\_\_\_\_

**If phone system statistics are not kept, provide the following estimates:**

Number of calls on an average business day: \_\_\_\_\_

Number of calls on the busiest day of the week: \_\_\_\_\_

Number of calls on the busiest hour of that day: \_\_\_\_\_

*Busiest Hour % of Calls:* \_\_\_\_\_

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**Notes:**

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# Company Profile Sheet (Sheet No. \_\_\_ of \_\_\_ )

If more than one company or unique organization will be sharing the messaging system, complete one Company Profile Sheet for each company or organization.

## Company Name \_\_\_\_\_

No. of Employees:                      Current: \_\_\_\_\_                      Projected Over 24 Months (Total): \_\_\_\_\_

No. of Extensions:                      Current: \_\_\_\_\_                      Projected Over 24 Months (Total): \_\_\_\_\_

Range of Extension No.                      From: \_\_\_\_\_                      To: \_\_\_\_\_

**Is there a company operator (or receptionist/operator)? (Y/N)** \_\_\_\_\_

Primary Operator's Name: \_\_\_\_\_ Extension: \_\_\_\_\_

After Hours Operator's Name: \_\_\_\_\_ Extension: \_\_\_\_\_

## Business Hours: ( If closed all day, write "Closed" in either of the fields. )

Monday                      From: \_\_\_\_\_                      To: \_\_\_\_\_

Tuesday                      From: \_\_\_\_\_                      To: \_\_\_\_\_

Wednesday                      From: \_\_\_\_\_                      To: \_\_\_\_\_

Thursday                      From: \_\_\_\_\_                      To: \_\_\_\_\_

Friday                      From: \_\_\_\_\_                      To: \_\_\_\_\_

Saturday                      From: \_\_\_\_\_                      To: \_\_\_\_\_

Sunday                      From: \_\_\_\_\_                      To: \_\_\_\_\_

**Languages to be supported on the system:** \_\_\_\_\_                      Primary Language: \_\_\_\_\_

Secondary Languages:                      1 \_\_\_\_\_                      2 \_\_\_\_\_                      3 \_\_\_\_\_                      4 \_\_\_\_\_

## Prefixes:

List all three-digit prefixes in telephone numbers used to access company phones by outside callers. For example, if callers can dial 449-5905 to access one phone in the company and 756-8876 to access another phone, enter 449 and 756 in the space provided below.

\_\_\_\_\_                      \_\_\_\_\_                      \_\_\_\_\_                      \_\_\_\_\_                      \_\_\_\_\_                      \_\_\_\_\_  
\_\_\_\_\_                      \_\_\_\_\_                      \_\_\_\_\_                      \_\_\_\_\_                      \_\_\_\_\_                      \_\_\_\_\_

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**Notes:**

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# Call Flow Sheet

**Should the Automated Attendant (Check one):**

- Not be used? \_\_\_\_\_
- Answer all incoming calls? \_\_\_\_\_
- Answer incoming calls when operator lines are busy?\* \_\_\_\_\_
- Answer incoming calls only after normal business hours?\* \_\_\_\_\_
- Other: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**If answering all incoming calls, when lines to the Automated Attendant are busy, should the incoming calls be (Check one):\***

- Given a busy signal? \_\_\_\_\_
- Transferred to an operator? \_\_\_\_\_
- Operator's Ext: \_\_\_\_\_ Operator's Name: \_\_\_\_\_ (optional)

**If answering all incoming calls, should incoming calls from non-Touch-Tone phones be (Check one):**

- Politely disconnected? \_\_\_\_\_
- Provided an alternate number and politely disconnected? \_\_\_\_\_
- Alternate Number: \_\_\_\_\_
- Transferred to an operator?\* \_\_\_\_\_
- Operator's Ext: \_\_\_\_\_ Operator's Name: \_\_\_\_\_ (optional)

**If more than one company or organization is being supported by the system, should the system (Check one):**

- Provide individualized greetings for each company/organization? \_\_\_\_\_
- Provide the same greeting for all companies/organizations? \_\_\_\_\_
- Other (describe): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\* *Authorized Representative Note:* To set up the phone system to operate in this manner, you must program the phone switch accordingly. Refer to the switch documentation for details.

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**Notes:**

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# Single-Company Greetings Sheet

Complete this sheet if only one company or unique organization will be using the messaging system.

When the Automated Attendant answers an incoming call, it voices a main greeting, followed by an Attendant Menu prompt. If only one company or unique organization is using the system, the main greeting can differ depending on the time of day and whether the day is a designated holiday. Complete this sheet to indicate the text to be voiced as the main greeting at each of the times of day indicated. After voicing the main greeting, the system will voice the Attendant Menu prompt, which you define on the Attendant Menu Prompt Sheet.

If more than one language will be supported on the system, complete a Single-Company Greetings Sheet for each language, and identify the language in the space provided.

**Language:** \_\_\_\_\_ ( \_\_\_ of \_\_\_ )

Also, indicate the name of the individual who will be recording the greetings on the system:

Recorded by: \_\_\_\_\_ Ext: \_\_\_\_\_

Greeting	Greeting Text	Prompt #
Morning	_____ _____ _____ _____	_____
Afternoon	_____ _____ _____ _____	_____
Evening	_____ _____ _____ _____	_____

**The Attendant Menu prompt is *not* voiced following the Closed greeting. Instead, callers only have the option to leave a message in the default receptionist mailbox. A sample Closed greeting is provided below.**

**Example:** Thank you for calling Premiere Pictures Corporation. Our regular business hours are nine to five, Monday through Friday. If you would like to leave a message, including your name and telephone number so that we can get back to you, please press one. Otherwise, we look forward to hearing from you again during our normal business hours.

Closed	_____ _____ _____ _____	_____
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**Notes:**

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# Multiple-Company Greetings Sheet

## (Sheet No. \_\_\_\_ of \_\_\_\_ )

If more than one company or unique organization will be sharing the messaging system, complete one Multiple-Company Greetings Sheet for each company/organization.

When the Automated Attendant answers an incoming call, it voices a main greeting, followed by an Attendant Menu prompt. When more than one company or unique organization shares the system, you can designate a different main greeting to voice for each company/organization, both during and after designated business hours.

Complete this sheet to indicate the text to be voiced as the main greeting both during and after business hours for the corresponding company. The Automated Attendant voices this greeting and follows it with the default Attendant Menu prompt, *"Please enter the extension number of the person you would like to speak with."*

**Company:** \_\_\_\_\_

If more than one language will be supported on the system, complete a Multiple-Company Greetings Sheet for each language, and identify the language in the space provided.

**Language:** \_\_\_\_\_ ( \_\_\_\_ of \_\_\_\_ )

Also, indicate the name of the individual who will be recording the greetings for the system:

Recorded by: \_\_\_\_\_ Ext: \_\_\_\_\_

Greeting	Greeting Text	Mailbox #
During Business Hours	_____	_____
	_____	
	_____	
	_____	
	_____	
	_____	
	_____	
	_____	
	_____	
	_____	
After Business Hours	_____	_____
	_____	
	_____	
	_____	
	_____	
	_____	
	_____	
	_____	
	_____	
	_____	

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**Notes:**



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**Notes:**

# Call Queuing Prompts Sheet

Call Queuing provides callers the option to hold when the extension they are calling is busy. The messaging system can voice up to nine messages (verbal or music) to callers holding in the queue. You may, for example, choose to provide product information messages to callers in the queue.

Use this form to define the content of each Call Queuing message you want the system to voice and to indicate how other Call Queuing options are to be set.

If more than one language will be supported on the messaging system, complete a Call Queuing Prompts Sheet for each language, and identify the language in the space provided.

**Language:** \_\_\_\_\_ ( \_\_\_ of \_\_\_ )

**Call Queuing Setup Options:** (check those you want to activate)

- \_\_\_\_\_ Provide the caller keypress options while in the queue (such as trying another extension or transferring to the operator).
- \_\_\_\_\_ Periodically voice a "still busy" message to callers in the queue.
- \_\_\_\_\_ Periodically voice the caller's position in the queue.
- \_\_\_\_\_ Require the caller to press [\*] periodically to stay in queue (can apply only if the keypress option is also selected).
- \_\_\_\_\_ Upon transfer from the queue, voice, *"Please hold while your call is being transferred."*

Prompt	Prompt Text	Prompt #
Call Transfer Prompt	_____	93
Queuing Prompt 1	_____	_____
Queuing Prompt 2	_____	_____
Queuing Prompt 3	_____	_____
Queuing Prompt 4	_____	_____
Queuing Prompt 5	_____	_____
Queuing Prompt 6	_____	_____
Queuing Prompt 7	_____	_____
Queuing Prompt 8	_____	_____
Queuing Prompt 9	_____	_____

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**Notes:**

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# Holiday Greetings Sheet

You can specify up to 18 holidays as days on which the office is closed. On days designated as holidays, the Automated Attendant answers incoming calls with a specified greeting. Use this sheet to indicate the dates of upcoming holidays and the associated greeting that should be voiced on those days. Messages left by holiday callers are recorded to a default receptionist mailbox. Check the Retain column if the holiday will be on the same date next year.

If more than one language will be supported on the messaging system, complete a Holiday Greetings Sheet for each language, and identify the language in the space provided.

Language: \_\_\_\_\_ ( \_\_\_ of \_\_\_ )

	<b>Date</b>	<b>Retain?</b>	<b>Greeting Text</b>	<b>Prompt #</b>
1.	_____	___	_____	_____
2.	_____	___	_____	_____
3.	_____	___	_____	_____
4.	_____	___	_____	_____
5.	_____	___	_____	_____
6.	_____	___	_____	_____
7.	_____	___	_____	_____
8.	_____	___	_____	_____
9.	_____	___	_____	_____
10.	_____	___	_____	_____
11.	_____	___	_____	_____
12.	_____	___	_____	_____
13.	_____	___	_____	_____
14.	_____	___	_____	_____
15.	_____	___	_____	_____
16.	_____	___	_____	_____
17.	_____	___	_____	_____
18.	_____	___	_____	_____

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**Notes:**



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**Notes:**

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# Class of Service Information Sheet

The descriptions below provide a high-level explanation of each feature that can be activated, deactivated, or adjusted for each Class of Service setting. Use this information as you complete the COS Sheet, COS Redefinition Sheet, and Custom COS Definition Sheet.

## Call Screening

Call Screening allows a subscriber to accept, reject, or redirect a call. When Call Screening is activated, the system instructs callers requesting an extension to, *“Please speak your name at the tone, so I may say who is calling.”* Before the call is transferred to the subscriber’s extension, the subscriber hears, *“You have a call from <caller’s name>. To take this call, press pound. To reject the call, press one. Or to redirect the call, press star.”* If the subscriber wants to take the call, the subscriber presses <#>, and the caller is transferred to the extension. If the subscriber wants to reject the call, s/he presses <1> and immediately hangs up the phone. The caller is then told there was no answer at the extension and is given the choice of trying another extension, leaving a voice-mail message, transferring to the operator’s extension, or disconnecting. If a call is rejected by the subscriber, the caller is not given the option to page. The subscriber may also choose to redirect the call by pressing <\*>, followed by the destination mailbox number. The subscriber must then immediately hang up the phone so the caller can be transferred to the specified extension.

If you want to prohibit subscribers from changing the Call Screening for their mailboxes, do not select the Call Screening option in the mailbox’s Class of Service, and instead select the Call Screening option in the mailbox’s subscriber settings.

## Message Confirmation

Message Confirmation allows the subscriber to review the date and time a message was sent, to whom it was sent, and, if applicable, the date and time the recipient listened to or skipped the message. This feature helps the sender of a message determine if and when another subscriber received the message. This feature is not supported by the AMIS protocol—only messages sent to local subscribers or OctelNet destinations may be sent with confirmation.

## Folders

The Folders feature allows a subscriber to organize messages and faxes by storing them in “folders” in the mailbox. A subscriber can create up to nine folders to store messages. The subscriber records a label for each folder, which is voiced when the subscriber accesses the mailbox. For example, if a subscriber regularly receives messages that are either technical or administrative, the subscriber can create two folders with the labels *“Technical”* and *“Administration”* to save and organize the messages.

## Call Queuing

Call Queuing allows callers either to hold for a specific extension or leave a voice message when an extension is busy. Depending on how the Call Queuing is set up on the system, callers may be informed of their status in the queue, including their position (the number of calls ahead of them), while they hold for that extension. Call queuing may also give callers periodic opportunities to leave a voice message, continue to hold, or disconnect. The caller on hold may be provided with prerecorded music or messages, such as product information.

You may record up to nine verbal or music messages for callers to listen to while holding in the queue. For example, the messages could provide new product information or sales promotions to callers in the queue. The system voices each of the nine messages to each caller in the queue. After voicing each recorded message, the system voices the caller’s status followed by the available options. Once the system plays all the recorded messages, it returns to the first message and begins voicing the messages again. All mailboxes on a system that have Call Queuing activated in the Class of Service use the same nine prompts. The first caller in the queue hears a prompt before the call is transferred to the extension.

If you want to prohibit subscribers from changing the Call Queuing for their mailboxes, do not select the Call Queuing option in the mailbox’s Class of Service, and instead, select the Call Queuing option in the mailbox’s subscriber settings.

## Message Indicator

Message Indicators, such as lights and LEDs, can be used to notify subscribers of new messages in their mailboxes. Once a subscriber listens to or skips a message in a mailbox, the Message Indicator on the phone is turned off. Note that Message Indicators only work if the phone system supports the feature and the system has been set up to use the Message Indicators.

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## Intercom Paging

Intercom Paging allows a caller to page a subscriber who does not answer the mailbox extension. When a subscriber is paged, the system announces over the paging system, *"There is a call for <subscriber's name>."* The subscriber can then either retrieve the call from the subscriber's extension or use the intercom redirect feature to access the call from another extension by rerouting the call. If the subscriber does not respond to the page, the caller is given the option to try another extension, leave a voice message in the subscriber's mailbox, transfer to the operator, or disconnect. If the caller retries to call the original extension, the system waits approximately one minute before redialing that extension.

Paging may be set to Off, On, or Automatic. When paging is off, callers cannot page subscribers. When paging is on, the caller is given the option to page when there is no answer at the subscriber's extension. When paging is set to automatic, the subscriber is always paged once before the system performs the Call Handling options that are set up for the mailbox.

If you want to prohibit subscribers from changing the selected Intercom Paging option for their mailbox, do not select the Intercom Paging option in the mailbox's Class of Service, and, instead, select the appropriate Intercom Paging option in the mailbox's subscriber settings.

## Personal Group List

Personal Group Lists allows subscribers to create lists of mailboxes, so that one message can be sent to multiple recipients in one step. For example, a subscriber can create a personal Group List of all subscribers working on a particular project. The subscriber can then send a message to all subscribers on the project by entering a single number. Subscribers can create up to 10 personal Group Lists in their mailboxes, numbered 11 – 20 (unless the system is set up to use different numbers). Each of the personal Group Lists can contain up to 50 destinations, which can include local subscriber mailboxes, destinations on other voice-mail systems through network nodes, or other Group List numbers, including global Group Lists (if available in the mailbox's Class of Service). Each Group List included as a destination on a personal Group List counts as one destination. To include destinations on other voice-mail systems, the subscriber must also be permitted access to network message features in the mailbox's Class of Service.

## Global Group Lists

Global Group Lists allow subscribers to send messages to system Group Lists, numbered 26-35 (unless the system is set up with different numbers), and the global Group Lists, numbered 98 and 99. Each Group List can contain up to 50 destinations, which can include local subscriber mailboxes, destinations on other voice-mail systems through network nodes, or other Group List numbers. System Group Lists 26 – 35, which are created by the system manager over the phone in a supervisor mailbox by following the prompts, allow subscribers to send messages to mailboxes defined by the system manager. Global Group Lists 98 and 99, which are created automatically by the system, allow subscribers to send messages to all mailboxes in the subscriber's division and company, respectively. Subscribers cannot include these lists in their own personal Group Lists unless Global Group List is selected for the mailbox's Class of Service.

## Dial by Name

Dial by Name allows subscribers to enter a subscriber name through the phone keypad to dial a mailbox number, which allows subscribers to send messages to other subscribers without requiring them to know the subscriber's mailbox number. If there are multiple subscribers with the same or similar names, the system voices those names, then allows the subscriber to choose from the available names. This feature can also be used to send messages to other systems that support OctelNet through the NameNet feature.

In some instances, subscribers may belong to a voice-mail service bureau, where they do not need to know the mailbox numbers of other system subscribers. In this case, this feature should be disabled. If the system is set up to use Greeting by Port, only mailboxes with the same company or with no assigned company are voiced when a directory is requested.

## Call Handling

Call Handling allows subscribers to control how calls to their mailboxes are routed. For example, a subscriber can set up a mailbox to block all calls to a prompt that requests the caller to leave a message while the subscriber is on vacation. The mailbox can be set up to voice an optional prompt, forward the call to another extension, or route the call to a V-Tree. The mailbox can also be set up to perform one of these actions for either all calls to the mailbox, calls that are not answered, or calls that receive a busy signal.

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If you want to prohibit subscribers from changing the selected Call Handling option for their mailboxes, do not select the Call Handling option in the mailbox's Class of Service, and instead, select the appropriate Call Handling option in the mailbox's subscriber settings. This is especially useful when mailboxes are blocked to V-Trees because it prevents the feature from being accidentally deactivated by a subscriber.

## **V-Tree**

V-Trees allow subscribers to create custom voice menus in their mailboxes. V-Trees can route calls, provide information to callers, or collect information from callers. For example, a mailbox for a sales department can contain a V-Tree that allows callers to press <1> for information on product A, press <2> for information on product B, or press <3> to talk to a sales representative.

If you want to prohibit subscribers from changing the selected V-Tree options for their mailboxes, do not select the V-Tree option in the mailbox's Class of Service, and, instead, select the appropriate V-Tree options in the mailbox's subscriber settings.

## **Fax V-Tree**

Fax V-Tree allows subscribers to create V-Trees in their mailboxes that have fax options. For example, a mailbox for a sales department can contain a V-Tree that allows callers to press <1> for information on product A, press <2> for information on product B, press <3> to talk to a sales representative, or press <4> to have information on all products faxed to them. Note that the system must have fax boards installed, and it must have both the Fax V-Tree and V-Tree options selected in the mailbox's Class of Service to allow the subscriber to include fax features in a V-Tree.

## **Send Messages**

Send Messages allows subscribers to send messages from their mailboxes to other system subscribers or subscribers on other voice-mail systems, if networking options are set up for the system.

## **Receive Messages**

Receive Messages allows subscribers to receive messages in their mailboxes from both subscribers and outside callers (non-subscribers). When both this feature is selected and the system is set up to receive messages from other voice-mail systems, subscribers can receive messages from remote subscribers whose voice-mail systems support AMIS or OctelNet.

## **Save Messages**

Save Messages allows subscribers to save messages sent to their mailboxes. The values entered in the Days to Save section of the Class of Service dialog box determine how long the mailbox subscriber can save a messages in the mailbox before the system deletes them.

## **Undelete Messages**

Undelete Messages allows subscribers to recover either new or saved messages deleted from their mailboxes. This feature helps prevent subscribers from accidentally deleting a message in the mailbox. Subscribers can only undelete the messages that they deleted during the current session. Once a subscriber exits a mailbox by hanging up or backing out of the mailbox, the messages are permanently deleted.

## **Locate Messages Received**

Locate Messages Received allows subscribers to scan their new messages for messages sent from a particular subscriber. This feature only allows subscribers to scan for a message from another subscriber on the system. Subscribers cannot locate messages from another voice-mail system or an outside caller.

## **Locate Messages Sent**

Locate Messages Sent allows subscribers to search for and edit messages they have already sent from their mailboxes to other mailboxes that are still in the mailbox's new message queue. Subscribers can only use this feature to locate and edit messages sent to other subscribers on the system. Messages designated for dispatch to other voice-mail systems, including those scheduled for Follow-Me-Forward, cannot be edited.

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## Record Prompts

Record Prompts allows mailbox subscribers to record their own mailbox prompts. These prompts include the Please Hold prompt, Name prompt, Personal Greeting prompt, Optional 1 prompt, and Optional 2 prompt. If prompts are not recorded for a mailbox, the system default prompts are used. It is recommended that subscribers be allowed to record their own prompts to add a personal touch to the system.

## Operator Access

Operator Access allows callers to the mailbox to transfer to the mailbox's operator. This operator can be the default operator set up for the system or a personal operator specified on the Mailbox Entry dialog box.

## Failed Login Notification

Failed Login Notification allows the system to notify the subscriber logging into the mailbox that a caller to the system has attempted to access the mailbox by entering an incorrect password. Once the subscriber is notified, the subscriber can review the failed login message or delete it.

If you want to prohibit subscribers from changing the Failed Login Notification feature for their mailboxes, do not select the Failed Login Notification option in the mailbox's Class of Service, and instead, select the Failed Login Notification option in the mailbox's subscriber settings.

## Mailbox Lock-Out Option

Mailbox Lock-Out Option allows the system to lock a mailbox when a caller attempts to log into the mailbox and is disconnected after failing to enter the correct password for the mailbox after a specified number of attempts. A locked mailbox prevents any caller, including the subscriber, from gaining access to the mailbox other than to leave messages. The system manager must manually unlock the mailbox before the subscriber can access the mailbox.

If you want to prohibit subscribers from changing the mailbox lock-out feature for their mailboxes, do not select the Mailbox Lock-Out Option in the mailbox's Class of Service, and instead, select the Mailbox Lock-Out Option in the mailbox's subscriber settings.

## Auto Time-Date Voiceback

Auto Time-Date Voiceback configures the system to automatically voice the time and date a message was received in a subscriber mailbox when the subscriber listens to a message. When activated in a mailbox, the time and date information is voiced first for each message sent to the mailbox. This feature differs from the Envelope Information feature in three ways:

- Auto Time-Date Voiceback, when selected, is voiced for every message. Message information is only voiced when selected for an individual message.
- Auto Time-Date Voiceback is voiced before the message. Message information is voiced only after the message has been voiced and the subscriber has selected Message Information from the Message menu.
- Auto Time-Date Voiceback is selected in a mailbox's Class of Service and must be turned on or off either by the system manager in the mailbox's subscriber settings or by the mailbox subscriber. The Envelope Information feature is always available to the subscriber from the Message menu.

## Visual Mailbox

Visual Mailbox is an add-on module available with certain release versions that allows subscribers to access their mailbox using a visual interface on their PC. For additional information on using Visual Mailbox, refer to Chapter 19, "Installing and Configuring Visual Mailbox," online help, or your authorized representative.

## Multilingual Support

Multilingual Support allows callers to the mailbox to choose the language in which they want the prompts to voice when they perform actions in the mailbox, if a language has not already been selected at some point during the call. For example, if a caller dials an extension without accessing the Automated Attendant, a prompt is voiced that allows the caller to select the language in which system prompts are to be voiced. From that point on, all system prompts are voiced in the selected language.

If a language has already been selected at some point during the call, no language prompt is voiced when the caller accesses the mailbox.

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Note that this feature only selects the language for system prompts. The prompts associated with personal prompts or V-Trees voice in the language in which they were recorded.

## Supervisor

Supervisor allows a subscriber to access the Supervisor menu over the phone by logging into the mailbox, pressing <9> at the Main menu, and entering the system's Level 2 or 3 supervisor password. This allows the subscriber to perform a number of supervisor functions through the phone, including creating, editing, and deleting mailboxes; recording system and personalized prompts; maintaining system Group Lists; and using SOLVE, the Supervisor Online Voice Editor. Although the system allows any number of supervisors, only a few subscribers should have the Supervisor feature selected in their mailbox's Class of Service to limit the control of Supervisor functions. It is recommended that one subscriber in each company be authorized to use supervisor features, if the system is set up to use Greeting by Port.

## Delivery Options

Delivery Options control whether subscribers can use the Message Notification, Wake-Up Call, Casual AMIS, and primary fax destination features in the mailbox, and whether they can call local and long distance numbers.

## Not Allowed

Not Allowed prevents subscribers from using the Message Notification, Wake-Up Calls, Casual AMIS, and Primary Fax Destination features.

## Local Only

Local Only allows subscribers to enter only numbers defined as local numbers. The number of characters a subscriber can enter for a local number is limited by values entered during the set up of the system.

## Long Distance

Long Distance allows subscribers to enter up to 16 numbers to call numbers for the Message Notification, Wake-Up Calls, Casual AMIS, and Primary Fax Destination features.

## Batch Mode

Batch Mode, if selected, specifies that when the system performs Message Notification, it should only consider the subscriber successfully notified of the message when the message is either listened to or skipped by the subscriber. For example, if the system calls the number specified for Message Notification and an answering machine answers the call, the system interprets the attempt as a failure and attempts to notify the subscriber again according to the Message Notification setup. The subscriber must listen to or skip the message before the Message Notification is successful. If the subscriber only logs into the mailbox and does not listen to or skip the message, the system continues to call the subscriber according to the Message Notification setup.

If the Batch Mode option is not selected, the system interprets a Message Notification attempt successful when either someone or something, such as an answering machine, answers the phone. The system does not re-attempt to call the subscriber.

The Batch Mode feature does not affect Message Notification through a beeper. Batch mode is only used with Message Notification and has no effect on the Wake-Up Calls, Casual AMIS, and Primary Fax Destination features.

## Networking Options

Networking Options determine subscriber ability to send messages to other voice-mail systems.

## Highest Outgoing Dispatch

Highest Outgoing Dispatch defines how messages are sent from the mailbox.

- **Not Allowed** – Does not allow the mailbox subscriber to send any messages to other voice-mail systems.
- **Economy** – Sends messages to other voice-mail systems during the economy hours set up for the system. You can override the economy hours for individual network nodes if appropriate.

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- **Standard** – Allows subscribers to send messages marked with either economy or standard dispatch. Messages sent to other voice-mail systems with standard dispatch are held in a queue for the maximum time set up for the system or until a defined number of messages accumulate in the same queue, whichever occurs first.
  - **Priority** – Allows subscribers to send messages marked with Economy, Standard, or Priority dispatch. Messages sent to other voice-mail systems with priority dispatch are sent to the remote address after a three-minute delay. Note that, to use the future delivery feature to send a message to another system, a subscriber must be able to send priority messages.

## Casual AMIS

Casual AMIS allows subscribers to send messages to other voice-mail systems that support the AMIS protocol. If Casual AMIS is the only Networking option activated in the mailbox's Class of Service, the subscriber can only send messages to AMIS-compatible systems by entering the complete phone number of the system and the destination mailbox number.

The option selected under Delivery Options determines whether the subscriber can enter long distance telephone numbers to access distant AMIS destinations. If Local Only is selected, subscribers cannot send messages to destinations that require long distance telephone numbers.

## Administered AMIS

Administered AMIS allows subscribers to send messages to defined AMIS nodes. Nodes allow subscribers to enter a short series of digits that represent the complete phone number of another voice-mail system, instead of entering the entire phone number. If Administered AMIS is the only Networking option activated in the mailbox's Class of Service, the subscriber can only send messages to sites designated as AMIS nodes. Administered AMIS must be selected here if a subscriber is to be permitted to use the Follow-Me-Forward feature to access AMIS destinations.

## OctelNet

OctelNet allows subscribers to send messages to defined OctelNet nodes. OctelNet nodes allow subscribers to enter a short series of digits that represent the complete phone number of another system that supports OctelNet. If OctelNet is the only Networking option activated in the mailbox's Class of Service, the subscriber can only send messages to sites designated as OctelNet nodes. OctelNet must be selected here if a subscriber is to be permitted to use the Follow-Me-Forward feature to access OctelNet destinations.

## Follow-Me-Forward

Follow-Me-Forward allows subscribers to automatically forward mailbox messages received from outside callers or internal subscribers to a mailbox on another system. The Follow-Me-Forward feature is set up either by the system manager in the subscriber settings or by the mailbox subscriber through the mailbox. The Follow-Me-Forward feature is only available to subscribers on systems set up with AMIS and OctelNet nodes.

Messages that are sent to a mailbox from another voice-mail system cannot be forwarded again using the Follow-Me-Forward feature. These messages must be accessed by logging into the original destination mailbox.

If you want to prohibit subscribers from changing the Follow-Me-Forward options for their mailboxes, do not select the Follow-Me-Forward option in the mailbox's Class of Service, and instead, select the appropriate Follow-Me-Forward options in the mailbox's subscriber settings.

## Network Reply

Network Reply permits subscribers to reply to messages sent from other voice-mail systems. Since the system stores the address of the other voice-mail system that sent the message, subscribers are not required to enter the recipient's telephone and mailbox number.

## Language

Language allows you to select the default language to use for the mailbox, if your system is configured for multiple languages. The system can support as many as five languages. This feature only selects the language in which mailbox prompts are voiced once the mailbox is accessed.

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## Fax Options

Fax Options allows subscribers to send and receive faxes in their mailboxes.

### Send Faxes

Send Faxes allows subscribers to send fax messages, including copies of voice/fax messages, from their mailboxes to other system subscribers. Faxes cannot be sent to other voice-mail systems. If a fax message is sent to a Group List that contains both local subscribers and network destinations, only the local subscribers who are permitted to receive faxes receive the attached fax message. Recipients at the remote system only receive the voice portion of the message.

The Send Faxes option must be selected for subscribers to include fax capabilities in V-Trees that they create for their mailboxes.

### Receive Faxes

Receive Faxes allows subscribers to receive fax messages in their mailboxes from both subscribers and outside callers. This option must be selected for the primary fax destination and AutoPrint features to be available to subscribers over the phone.

### Max Messages

Max Messages defines the maximum number of messages (both new and saved) permitted in the mailbox. This feature helps to manage the system's available disk space by limiting the amount of space mailbox messages can take up on the system. The functions of the mailbox should be considered when setting this value. For example, you may want to allow the sales department mailboxes to store more messages than mailboxes in other departments. Make sure that the operators' mailboxes are able to store enough messages to allow for high call volume. The maximum number of messages a mailbox can contain is 1,000. The recommended Max Messages value is under 70.

### Msg Time

Msg Time defines the maximum length (in seconds) allowed for the following types of messages:

- Messages that subscribers record to send to other subscribers.
- Messages sent from other voice-mail systems.
- Messages sent to mailboxes from outside callers.

This feature helps to manage the system's available disk space by limiting the amount of space mailbox messages can take up on the system. The functions of the mailbox should be considered when setting this value. For example, a customer service department may require a longer message time than an accounting department. The minimum for this option is 30 seconds; the maximum message length is 6,000 seconds. If AMIS messaging is permitted, this value should be set to no more than 480 seconds (eight minutes) to accommodate the maximum AMIS message time.

### Max Rings

Max Rings defines the number of rings before the messaging system determines that there is no answer at a subscriber's extension.

If you enter a zero (0), the system transfers and releases the call without determining if there is no answer or the extension is busy. If there is no answer or if the mailbox is busy, the call does not go back to the system, unless an integration feature is being used on the system, or the phone itself is forwarded to the voice-mail extension.

It is recommended that you do not set the ring count to less than 3, or more than 15. The system may not recognize less than 3 rings on some telephone switches, and more than 15 rings may produce unpredictable results.

### New Messages

The New Messages field specifies the number of days a message that has not been listened to can remain in the mailbox before it is automatically deleted by the system. To keep messages in the mailbox until they are either saved or deleted, enter 99. The system can also be set up to notify mailbox subscribers that a message has been deleted from their mailbox by the system.

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## Saved Messages

The Saved Messages field specifies the total number of days that a message can remain in the mailbox before it is automatically deleted by the system. The total number of days a message has been in a mailbox starts as soon as the mailbox receives the message. For example, if this field is set to 14 days and a message was sent to the mailbox 4 days ago, it will only be saved for 10 more days, even though it was listened to and saved by the subscriber after 2 days. To save messages indefinitely, enter 99. The system can also be set up to notify mailbox subscribers that a message has been deleted from their mailbox by the system.

# Predefined COS Sheet

This form identifies the predefined class of services. Refer to the Class of Service Information Sheet for more information.

Features	Class of Service Number																								
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25
Call Screening	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Msg. Confirmation	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Voice Folders	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Call Queuing	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Msg. Indicator	N	N	N	N	Y	Y	Y	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y	Y
Intercom Paging	N	N	N	N	N	N	N	N	Y	Y	Y	N	N	N	N	N	N	N	N	N	N	Y	Y	Y	Y
Personal Group Lists	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Global Group Lists	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Dial by Name	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Call Handling	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
V-Trees Allowed	N	N	Y	N	N	N	N	Y	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y
V-Tree Fax Supported	N	N	N	N	N	N	N	Y	N	N	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N
Send Messages	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Receive Messages	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Save Messages	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Undelete Messages	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Locate Messages Rec'd.	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Locate Messages Sent	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Record Prompts	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Operator Access	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Failed Login Notification	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Mailbox Lock-Out	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Auto Timestamp	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
Visual Mailbox	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Enable Multilingual Sup.	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Supervisor Mailbox	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	Y	Y	Y	Y
Delivery Options	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Outcalling Type	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L	L
Batch Mode	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Network Method (Disp.)	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Casual AMIS	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Administered AMIS	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
OctelNet	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Follow-Me-Forward	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Network Replies	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Language	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E	E
Send Faxes	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Receive Faxes	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Max. # of Messages	30	30	30	30	30	1000	30	30	30	30	30	1000	30	100	30	30	30	30	30	30	30	50	50	30	50
Max. Rings	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
Max. Single Msg. Time	300	300	300	300	300	300	300	300	300	300	300	6000	300	1800	300	300	300	300	300	300	300	300	300	300	300
Days for New Messages	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7
Days for Saved Messages	14	14	14	14	14	14	14	14	14	14	14	14	30	14	14	14	14	14	14	14	14	14	14	14	14

**Abbreviations**

Y=Feature Access is Activated      N=Feature Access is Not Activated  
 Msg Delivery Notification: L=Local Only      Default Language: E=English

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**Notes:**

# COS Redefinition Sheet

Use this form in conjunction with the COS Sheet and the Predefined COS Sheet. Refer to the Class of Service Information Sheet for more information.

Features	Class of Service Number																								
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25
Call Screening	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Msg. Confirmation	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Voice Folders	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Call Queuing	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Msg. Indicator	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Intercom Paging	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Personal Group Lists	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Global Group Lists	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Dial by Name	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Call Handling	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
V-Trees Allowed	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
V-Tree Fax Supported	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Send Messages	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Receive Messages	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Save Messages	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Undelete Messages	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Locate Messages Rec'd.	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Locate Messages Sent	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Record Prompts	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Operator Access	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Failed Login Notification	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Mailbox Lock-Out	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Auto Timestamp	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Visual Mailbox	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Enable Multilingual Sup.	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Supervisor Mailbox	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Delivery Options	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Outcalling Type	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Batch Mode	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Network Method (Disp.)	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Casual AMIS	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Administered AMIS	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
OctelNet	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Follow-Me-Forward	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Network Replies	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Language	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Send Faxes	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Receive Faxes	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Max. # of Messages	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Max. Rings	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Max. Single Msg. Time	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Days for New Messages	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Days for Saved Messages	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—

**Abbreviations to Use**

Msg Delivery Notification: N=Not Allowed, L=Local Only, D=Long Distance, B=Batch Mode

Network Method: N=Not Allowed, E=Economy, S=Standard, P=Priority

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**Notes:**

# Custom COS Definition Sheet

Use this form in conjunction with the COS Sheet. Refer to the Class of Service Information Sheet for more information.

**Features**

**Class of Service Number**

	<u>C1</u>	<u>C2</u>	<u>C3</u>	<u>C4</u>	<u>C5</u>	<u>C6</u>	<u>C7</u>	<u>C8</u>	<u>C9</u>	<u>C10</u>	<u>C11</u>	<u>C12</u>	<u>C13</u>	<u>C14</u>	<u>C15</u>	<u>C16</u>	<u>C17</u>	<u>C18</u>	<u>C19</u>	<u>C20</u>	<u>C21</u>	<u>C22</u>	<u>C23</u>	<u>C24</u>	<u>C25</u>
Call Screening	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Msg. Confirmation	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Voice Folders	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Call Queuing	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Msg. Indicator	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Intercom Paging	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Personal Group Lists	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Global Group Lists	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Dial by Name	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Call Handling	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
V-Trees Allowed	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
V-Tree Fax Supported	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Send Messages	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Receive Messages	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Save Messages	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Undelete Messages	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Locate Messages Rec'd.	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Locate Messages Sent	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Record Prompts	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Operator Access	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Failed Login Notification	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Mailbox Lock-Out	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Auto Timestamp	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Visual Mailbox	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Enable Multilingual Sup.	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Supervisor Mailbox	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Delivery Options	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Outcalling Type	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Batch Mode	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Network Method (Disp.)	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Casual AMIS	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Administered AMIS	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
OctelNet	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Follow-Me-Forward	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Network Replies	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Language	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Send Faxes	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Receive Faxes	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Max. # of Messages	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Max. Rings	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Max. Single Msg. Time	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Days for New Messages	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Days for Saved Messages	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—

**Abbreviations to Use**

Msg Delivery Notification: N=Not Allowed, L=Local Only, D=Long Distance, B=Batch Mode

Network Method: N=Not Allowed, E=Economy, S=Standard, P=Priority

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**Notes:**



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**Notes:**

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# Auto Forward Sheet

Auto Forwarding sends messages that have not been listened to within a specified amount of time to another mailbox. Use this form to indicate any mailboxes for which Auto Forwarding should be activated, and specify the activation parameters in the spaces provided.

<b>Mailbox</b>	<b>Forward to Mailbox</b>	<b>Hours</b>	<b>- After - and</b>	<b>Minutes</b>	<b>Delete from Original Mailbox after Forwarding</b>
_____	_____	_____	_____	_____	_____ (Y/N)
_____	_____	_____	_____	_____	_____ (Y/N)
_____	_____	_____	_____	_____	_____ (Y/N)
_____	_____	_____	_____	_____	_____ (Y/N)
_____	_____	_____	_____	_____	_____ (Y/N)
_____	_____	_____	_____	_____	_____ (Y/N)
_____	_____	_____	_____	_____	_____ (Y/N)
_____	_____	_____	_____	_____	_____ (Y/N)

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**Notes:**



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**Notes:**

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## V-Tree Design Sheet Instructions

V-Trees can significantly reduce the time employees spend performing basic, repetitive tasks. A simple V-Tree can, for example, provide callers with options that answer common questions, direct phone calls, and take orders from field representatives. On systems with installed fax boards, you can set up a V-Tree to automatically fax certain documents to callers who request them.

The V-Tree Design Sheet allows you to outline the sequence of prompts and actions to be performed by a V-Tree in a particular mailbox. This information provides you and your authorized representative with a high-level guide of how a V-Tree is to function. Complete one (set of) V-Tree Design Sheets for each mailbox to be serviced by a V-Tree.

In the Item column, indicate the keypress(es) a caller will need to make to access the corresponding prompt. The first prompt voiced will have no keypresses indicated in the Item column, since the caller automatically hears that prompt when accessing the mailbox containing the V-Tree. If a caller needs to press <1> at the first prompt then <4> at the second prompt to hear a third prompt, you should write "1 – 4" in the Item column to the left of that third prompt.

In the Prompt column, indicate the prompt that should be voiced by the system.

In the Next Item column, identify the number of the Item that should be invoked next or indicate the action that should be taken by the system. Available actions include:

<b>Action</b>	<b>Description</b>
Login	Transfers caller to the mailbox's, <i>"Please enter your mailbox number..."</i> prompt.
Attendant	Transfers caller to the attendant's, <i>"Please enter the extension number..."</i> prompt.
Directory	Transfers caller to directory services.
MB xxxx	Transfers caller to the mailbox number you specify, shown as xxxx, where xxxx is the mailbox number .
Ext. xxxx	Transfers caller to an extension you specify, shown as xxxx, where xxxx is the extension number.
Record	Records a message from the caller in the current mailbox.
Fax	Transmits a fax to the caller.
Disconnect	Politely ends the call.

Refer to the example V-Tree Design Sheet to see how a sample V-Tree is documented.

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**Notes:**



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**Notes:**



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**Notes:**

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# Site Contact Information Sheet

## Customer Information

Customer name: \_\_\_\_\_  
System type: \_\_\_\_\_  
System serial number: \_\_\_\_\_  
Customer address: \_\_\_\_\_  
Telephone: \_\_\_\_\_  
System manager (contact person): \_\_\_\_\_  
System manager phone: \_\_\_\_\_  
Backup system manager: \_\_\_\_\_  
Backup system manager phone: \_\_\_\_\_  
Primary technician servicing site: \_\_\_\_\_  
Backup technician: \_\_\_\_\_  
Salesperson: \_\_\_\_\_

## System Access Information

System access phone number: \_\_\_\_\_  
Modem phone number: \_\_\_\_\_  
Modem password: \_\_\_\_\_

## System Information

PBX: \_\_\_\_\_  
PBX software: \_\_\_\_\_  
PBX vendor: \_\_\_\_\_  
Integration (circle or indicate): Inband ES232 DID E&M Emulation VTG Supervised Other: \_\_\_\_\_  
Hardware configuration: \_\_\_\_\_  
No. ports/type: \_\_\_\_\_  
No. drivers/type: \_\_\_\_\_  
System manager mailbox: \_\_\_\_\_  
System manager password: \_\_\_\_\_  
Backup system manager mailbox: \_\_\_\_\_  
Backup system manager password: \_\_\_\_\_  
Switch room phone: \_\_\_\_\_  
Fax machine phone: \_\_\_\_\_  
Automated attendant phone: \_\_\_\_\_  
No. of subscribers: \_\_\_\_\_

## Implementation Information

System installation date: \_\_\_\_\_  
System software version: \_\_\_\_\_

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**Notes:**

## System Configuration Record Setup Parameters

Feature	Value Set	Default Value
<b>General Parameters (General tab)</b>		
Enable Automated Attendant		Yes
Number of Digits in a Mailbox		4
# of Calls Between Checkpoint File Updates (CKPRATE)		5
Tutor for New Mailboxes		Yes
Daily Maintenance Hour (0=midnight)		2
Shutdown System after Daily Maintenance		Yes
Automatic Clock Reset for Daylight Saving Time		No
First Personal Group List Number		11
First System Group List Number		26
<b>Operator Parameters (Operator tab)</b>		
Default Operator Mailbox Number		1000
After Hours Operator Mailbox Number		1000
Inform Subscriber Transfer is from Attendant		Yes
Disconnect all Rotary Callers		No
Number Attempts Rotary Transfer to Busy Operator		3
Maximum Number of Errors		3
Maximum Number of No Entries		3
Transfer Calls to Operator after Max. Errors		Yes
<b>General Transfer Parameters (Invalid Mbox tab)</b>		
Transfer Invalid Mailboxes during Business Hours		No
Transfer Invalid Mailboxes after Business Hours		No
<b>Time/Date Parameters (Time/Greetings tab)</b>		
Start of Morning Hours		6:00 AM
Start of Afternoon Hours		12:00 PM
Start of Evening Hours		6:00 PM
Enable Chinese Date		No
<b>Message Timing Parameters (Message Timing tab)</b>		
Number Seconds to Rewind Message		5
Number Seconds to Pause Message		5
No. Seconds to Fast Forward Message		5
Maximum Time to Record Mailbox Prompts		90
Minimum Message Length in Seconds		2
<b>Subscriber Parameters (Subscriber tab)</b>		
Permit Subscribers to Leave Messages to Themselves		Yes
Permit Listen-Only Messages to be Reviewed		No
Enable Confirmation of Deleted Messages		Yes
Voice Warning when Messages Expire		No
Voice Warning Msg Time is Less Than 2 Min.		Yes
Maximum Number of Forwarded Extensions		10
Consecutive Login Failures before Lock-Out		0
Enable Extended Password Security		Yes
Minimum Length of Password		4
Days Before Forced Password Change		28

	<b>Feature</b>	<b>Value Set</b>	<b>Default Value</b>
	Set Initial Password to Default (Default 1111)		Yes
	Set Initial Password to None Required		No
	Set Initial Password to Random Generator Method		No
<b>Caller Parameters (Caller tab)</b>			
	Permit Caller to Leave Multiple Messages		Yes
	Permit Caller Access to Directory Services		Yes
<b>Networking Parameters (Networking tab)</b>			
	System Telephone Access Number		
	Network Prefix		9,
	International Access Code		011
	Country Code		1
	Long Distance Access Code		1
	Dispatch Options – Permit Inbound		Yes
	Dispatch Options – Permit Outbound		Yes
	Economy Hours – Starting Weekday Time		11:00 PM
	Economy Hours – Ending Weekday Time		6:00 AM
	Economy Hours – Starting Weekend Time		11:00 PM
	Economy Hours – Ending Weekend Time		6:00 AM
	Maximum Number of Attempts Before Failure		5
	Maximum Delay For Queued Dispatch in Minutes		15
	Maximum Number of Queued Messages		3
	No Answer – Number of Retries		5
	No Answer – Delay (In Minutes)		5
	Busy – Number of Retries		5
	Busy – Delay (In Minutes)		5
<b>NameNet Parameters (NameNet tab)</b>			
	Maximum Number of NameNet Records		1000
	Maximum Number of Idle Days for NameNet Records		180
	Interval for Notification of Non-Receipt for OctelNet Messages		5
<b>Fax Parameters (Fax tab)</b>			
	Local Fax Machine Telephone Number		
	Fax Board Type		None
	V-Tree Fax Retrieval		No
	Use Immediate Fax Delivery Mode in V-Trees		No
	Fax Retrieval Storage Mailbox		1000
	Fax Mail Allowed		No
	Use a Fax Cover Sheet		No
	Number Attempts when Sending a Fax		9
	Fax Delivery Retry Delay (Minutes)		2
	Fax Prefix Code		9,
<b>Fax Extensions (Fax Extensions tab)</b>			
	Transfer to Extensions (Requires SHUTDOWN)		No
	Extension Connected to Fax Channel 0		
	Extension Connected to Fax Channel 1		
	Extension Connected to Fax Channel 2		
	Extension Connected to Fax Channel 3		
	Extension Connected to Fax Channel 4		
	Extension Connected to Fax Channel 5		

	<b>Feature</b>	<b>Value Set</b>	<b>Default Value</b>
	Extension Connected to Fax Channel 6		
	Extension Connected to Fax Channel 7		
	Extension Connected to Fax Channel 8		
	Extension Connected to Fax Channel 9		
	Extension Connected to Fax Channel 10		
	Extension Connected to Fax Channel 11		
<b>Call Queuing Parameters (Call Queuing tab)</b>			
	Maximum Number of Callers Allowed in Queue		5
	Voice "Extension is (still) busy" while in Queue		Yes
	Voice Caller's Position in Queue		Yes
	Voice "Please Hold while Call is Transferred"		Yes
	Voice and Accept Keypress Options while in Queue		Yes
	Custom Call Queuing Phrase for Operator		No
	Require Caller to Press Star to Stay in Queue		No
	Number of Seconds for First Caller in Queue to Wait		1
<b>Intercom Paging Parameters (Paging tab)</b>			
	Intercom Paging Code		
	Release Code for Intercom Paging		
	Repeat Intercom Paging Phrase		No
	Number Retries when Paging is Busy		3
	Max Number of Retries in Paging (Intercom Redirect)		3
	Paging Wait Time (Intercom Redirect)		90
<b>Call Transfer Parameters (Call Transfer tab)</b>			
	Transfer Prefix Code		
	Custom Transfer Code		&,XDR
	Number Seconds to Delay before Transferring		0
	Transfer Release Code when Busy		&,
	Transfer Release Code when No Answer		&,
	Permit Voice Mail After Busy or No Answer		Yes
	Flash Time Interval (FLINTVL)		50
	Pause Interval for Comma in Dial String (PAINTVL)		200
	Inter-Digit Delay Time (TONEDLY)		8
	Duration Time of Valid DTMF (TONELEN)		8
	Third Party Transfer (Start) Code		
	Third Party Transfer (End) Code		
<b>Call Screening Parameters (Call Screening tab)</b>			
	Call Screening Release Code when Busy		&,
	Call Screening Release Code when No Answer		&,
	Call Screening Release Code when Reject		&,
	Call Screening Release Code when Transfer		&,
<b>Call Waiting Parameters (Call Waiting tab)</b>			
	Call Waiting Code		
	Number Attempts for Call Waiting		0
	Release Code for Call Waiting		
<b>Outbound Dialing Parameters (Outbound Calls tab)</b>			
	Code Accessing an Outside Line		9,
	Number of Digits in Local Telephone Number		7
	Maximum Rings before No Answer (RINGS)		5

Feature		Value Set	Default Value
	Use DialPlan database		No
	Time to wait for possible incoming call (SCHDWAIT)		500
<b>Message Delivery Parameters (Msg Delivery tab)</b>			
	Custom Message Delivery Code		
	Number of Seconds to Wait before Message Delivery		1
	Dial Tone Timeout During Message Delivery (DTONWAIT)		200
<b>Message Indicator Parameters (MI tab)</b>			
	Permit Message Indicators		No
	Message Indicator Prefix ON Code		
	Message Indicator Prefix OFF Code		
	Message Indicator Suffix ON Code		
	Message Indicator Suffix OFF Code		
	Message Indicator Supervised		No
	Light Message Indicator for Every Msg.		No
	Message Indicator Dials Number On Hook		No
<b>Inband Signaling Parameters Page 1 (Inband Page 1 tab)</b>			
	Total Number of Inband digits (DIDCOUNT)		0
	Inband Terminating Character (DIDTERM)		
	Seconds to Wait for DID (DIDTIME)		1
	Number of Milliseconds Wait for Digits		0
	Off Hook Delay Time (OFFHDLY)		25
	Activate Digit Grabber (DIGRAB)		Yes
<b>Inband Signaling Parameters Page 2 (Inband Page 2 tab)</b>			
<b>Hangup Detection Parameters (Hangup tab)</b>			
	Dial Tone Detection Time (DTONDET)		0
	Hangup String (HANGUPSTR)		
	Hangup String Timeout (HANGUPDLY)		0
	Minimum Duration for Drop in Loop Current (LCDTIME)		30
	Maximum Silence Before Hanging Up (MAXSIL)		2000
<b>Port Parameters (Port Parameters tab)</b>			
<b>Voice System Parameters (Voice System tab)</b>			
	Go Off Hook when Port Disabled (OFFHDIS)		Yes
	Maximum Call Duration (PROGTIME)		0
	DTMF Length to Interrupt a Prompt (PLAYDTMF)		5
	DTMF Duration to Interrupt Record (RECDTMF)		5
	Default Input Timeout (TIMEOUT)		20
	Duration of Ring Off (RINGOFF)		5
	Duration of Ring On (RINGON)		3
	Sound Tone on Answer (ANSTONE)		No
	Debug Mode		No
<b>Simplified Message Desk Interface Parameters (SMDI tab)</b>			
	Use SMDI (SMDIUSED)		No
	Use Communications Message Indicator Software (COMMWL)		No
<b>Server tab</b>			
	Maximum time before logging off an active client		120
	Maximum time before logging off a passive client		0
	Common Setup Parameters – VFS Server Name		
	Common Setup Parameters – VFS Debug Flag		No

Feature	Value Set	Default Value
Common Setup Parameters – Protocol – Use Shared Files		Yes
Common Setup Parameters – Protocol – Use SPX		No
Common Setup Parameters – File Server – Netware		Yes
Common Setup Parameters – File Server – Local		No
Common Setup Parameters – File Server – Peer OS/2		No
Common Setup Parameters – Server Path		
Novell Netware Server Setup – Server Name		
Novell Netware Server Setup – Login Acct Name		VFS_ACCT
Novell Netware Server Setup – Login Acct Pass		
Novell Netware Server Setup – Mapping		
Windows NT Server Setup – Domain Name		
Windows NT Server Setup – User ID		
Windows NT Server Setup – Login Pass		
Windows NT Server Setup – NT Network Name		

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**Notes:**

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# Visual Mailbox Implementation Considerations Worksheet

The following list of considerations are designed to ensure a smooth Visual Mailbox installation. Make sure you and the site's LAN Administrator complete this worksheet before you attempt Visual Mailbox installation.

## Setting Up the LAN

- \_\_\_ Does the LAN meet the necessary requirements:
  - \_\_\_ Novell NetWare 3.x, 4.x, or NT Server
  - \_\_\_ Shared file configuration
  - \_\_\_ Does the LAN server have enough hard drive space to add a directory that all clients can access?
  - \_\_\_ Is the LAN installed and functioning properly?
  - \_\_\_ Have the groups for LAN users who will be accessing Visual Mailbox been created?

## Hardware Requirements

- \_\_\_ Does the system hardware meet the requirements for Visual Mailbox installation:
  - \_\_\_ Does it meet the minimum requirements for CPU and memory provided in Chapter 2 of the *Implementation and Service Manual*?
  - \_\_\_ Does it have enough slots to accommodate the NIC as well as the necessary number of voice and fax ports?
  - \_\_\_ Number of voice ports on the system/type of voice board: \_\_\_\_\_
  - \_\_\_ Number of fax ports on the system/type of Brooktrout board: \_\_\_\_\_
- \_\_\_ Is a network card installed?
  - \_\_\_ The interrupt/address of the NIC: \_\_\_\_\_
  - \_\_\_ Is there a cabled connection for attachment to the LAN?
- \_\_\_ Does the hard drive have enough available disk space to install the Voice Fax Server software and databases?
  - \_\_\_ Size of hard drive: \_\_\_\_\_
  - \_\_\_ Amount of available space on hard drive: \_\_\_\_\_
- \_\_\_ If the customer wants the clients to use the fax viewer, is a fax board installed?
- \_\_\_ Does the sentinel allow Visual Mailbox?
  - \_\_\_ Does it allow any other utilities required by the application (AMIS, Serial Integration)?
  - \_\_\_ Does the sentinel have rights for the necessary number of users?

## Software Requirements

- \_\_\_ Do you have Visual Mailbox software?
- \_\_\_ Is the messaging software ready for the installation?
  - \_\_\_ Is the messaging system up and running properly?
  - \_\_\_ Are all integration features functioning properly?
  - \_\_\_ If the customer wants to use Fax Solution or network messaging in Visual Mailbox, has it been configured and tested?
  - \_\_\_ Do future Visual Mailbox users all have messaging system mailboxes?
- \_\_\_ Is the PBX ready for Visual Mailbox installation?
  - \_\_\_ Check the Configuration Note to ensure that third-party transfers are supported on the switch.
  - \_\_\_ Is the switch configured as described in the Configuration Note?

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\_\_\_\_\_ If required, is the messaging system integrated with the switch?

## **Client PC Requirements**

\_\_\_\_\_ Are all client PCs ready for installing the interface:

\_\_\_\_\_ Does each client PC meet the minimum requirements for CPU and memory?

\_\_\_\_\_ Is a network card installed in each client PC?

\_\_\_\_\_ Record the interrupts and addresses of each client PC network card.

\_\_\_\_\_ Does each client PC have a connection for attachment to the LAN?

\_\_\_\_\_ Does the client PC have a login script that attaches to the LAN server and makes login available?

\_\_\_\_\_ Does the hard drive have enough available disk space to install the Visual Mailbox client software?

\_\_\_\_\_ Is each client PC running Microsoft Windows 3.x, Windows 95, or Windows NT 4.0 with Service Pak 3 or higher?

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# Novell NetWare Configuration Worksheet

If the Visual Mailbox Voice Fax Server is being connected to a Novell network, use this worksheet to properly configure the Novell network for Visual Mailbox installation and to provide to the authorized representative the information required for a successful Visual Mailbox implementation.

## Perform the Following Tasks Before Visual Mailbox Installation:

Place a check to each task as you complete it:

- \_\_\_ Create the following three directories on the LAN server:
  - \_\_\_ \\MBOX\DATA—contains the communication data files for the client PCs and the server as well as the directory lists and names
  - \_\_\_ \\MBOX\DATA\BIN—a temporary directory that collects message information for specific mailboxes before it is sent to client PCs
  - \_\_\_ \\MBOX\CLIENT—contains the Visual Mailbox client software
  
- \_\_\_ Once a directory on the LAN is created for Visual Mailbox, create an account on the appropriate server for the Voice Fax Server to log into. This provides the system with a channel for communicating with the client PCs on the network. The following tasks are involved in this procedure:
  - \_\_\_ Create a new account named VFS\_ACCT on the network file server and assign the login password VMBOX to the account.
  - \_\_\_ Assign the following account restrictions to the account:

Account Disabled	No
Account has expiration date	No
Allow user to change password	No
Require Password	Yes
Minimum Password Length	5
Require Unique Password	No
  - \_\_\_ All other parameters should be disabled.
  - \_\_\_ Select the file server and assign the VMBOX directory.
  - \_\_\_ Assign the following privileges to the VMBOX directory: Create, Write, Read, Erase, Modify, and File Scan.
  - \_\_\_ Verify the account has 24-hour, 7-days per week access to the network file server.
  
- \_\_\_ Once the Voice Fax Server account is created, the subscribers who will be using Visual Mailbox must be identified by creating a “group” of subscribers. By creating a group, you can administrate Visual Mailbox access more easily, since you can assign rights to read, write, create, and erase files in the VMBOX\DATA directory to groups of subscribers instead of on a subscriber-by-subscriber basis. The following procedures are involved in this task:
  - \_\_\_ Create a user group or select an existing user group.
  - \_\_\_ Select the file server and directory (VMBOX) on which Visual Mailbox will be installed.
  - \_\_\_ Assign network rights to the subscriber group. PC audio users must be assigned all network rights (read, write, create, erase, modify, and scan) to the ...\\DATA\BIN directory on the LAN server.
  - \_\_\_ Activate the member list.
  - \_\_\_ Select subscribers to be added to the group.
  - \_\_\_ Map the subscribers in the group to the appropriate drive and directory on the voice fax server by adding the following statements to the LAN login script. In the example, the name of the group is GROUP1, the mapped drive letter is P, and the network volume name is VOL1:

```
IF MEMBER OF " GROUP1" BEGIN
MAP P: =VOL1:VMBOX
END
```

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**Record the Following Required Information:**

1. Record the Novell server that stores the \VMBOX directory: \_\_\_\_\_
2. Record the volume under the specified server and the directory structure that contains the \VMBOX directory: \_\_\_\_\_  
\_\_\_\_\_
3. Record the version of NetWare installed on the LAN: \_\_\_\_\_
4. If version 4.x of NetWare is installed on the LAN, record the Name Content: \_\_\_\_\_

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# Windows NT Configuration Worksheet

If the Visual Mailbox Voice Fax Server is being connected to a Windows NT network, use this worksheet to properly configure the NT network for Visual Mailbox installation and to provide to the authorized representative the information required for a successful Visual Mailbox implementation.

## Perform the Following Tasks Before Visual Mailbox Installation:

- \_\_\_\_ Create the following three directories on the NT server:
  - \_\_\_\_ VISMAL\VMBOX\DATA—contains the communication data files for the client PCs and the server as well as the directory lists and names
  - \_\_\_\_ VISMAL\VMBOX\DATA\BIN—a temporary directory that collects message information for specific mailboxes before it is sent to client PCs
  - \_\_\_\_ VISMAL\VMBOX\CLIENT—contains the Visual Mailbox client software
- \_\_\_\_ From the NT server, create a share for the \\VISMAL directory that provides Full Control access for Visual Mailbox users.
- \_\_\_\_ Create a new account with the user ID VFS\_ACCT for the Voice Fax Server and assign the login password VMBOX to the account.
- \_\_\_\_ If LAN is using TCP/IP and is not using the Dynamic Host Configuration Protocol (DHCP), assign an IP address to the VFS PC.

## Record the Following Required Information:

1. Record the Voice Fax Server's assigned NT domain or network workgroup: \_\_\_\_\_

\_\_\_\_\_  
(This information is entered in the Domain Name field during Networking Support for OS/2 installation.)

2. Record the NT Server name and the name of the share assigned to the \\VISMAL directory (\\<NT Server Name>\<Share Name>): \_\_\_\_\_

\_\_\_\_\_  
(This information is entered in the NT Network Name field during Networking Support for OS/2 installation.)

If the LAN is using TCP/IP, complete the following steps.

3. Indicate whether the LAN is using DHCP by circling Yes or No: YES / NO

4. Record the IP address of the voice fax server: \_\_\_\_\_

\_\_\_\_\_  
(This information is entered in the IP Address field during Networking Support for OS/2 installation.)

5. Record the subnet mask of the LAN: \_\_\_\_\_

\_\_\_\_\_  
(This information is entered in the Subnet Mask field during Networking Support for OS/2 installation.)

6. Record the IP address of the router: \_\_\_\_\_

\_\_\_\_\_  
(This information is entered in the Router field during Networking Support for OS/2 installation.)

7. Record the IP address of the domain name server, if the LAN is using a domain name server for host name resolution: \_\_\_\_\_

\_\_\_\_\_  
(This information is entered in the TCP/IP Domain Name field during Networking Support for OS/2 installation.)

8. Record the IP address of the WINS server: \_\_\_\_\_

\_\_\_\_\_  
(This information is entered in the NetBIOS Name Server address field during Networking Support for OS/2 installation.)

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**Notes:**