PARTNER MAIL VS®
Voice Messaging System Release 4.0
Planning Forms

System Security Information

Overview

This package contains the voice messaging system forms that serve as a reference during the installation and programming of the system. You are advised to photocopy these forms before completing them The photocopies can be used in the future to record any changes you make to the system's installation or programming. *Be sure to keep all forms regarding your communications and voice messaging systems in a secure place*

As the System Manager, you are responsible for the security of the system It is important that you fully understand and appropriately administer this product to reduce your risk of incurring charges that result from unauthorized use of the system. You should review the security guidelines summarized in this packet. Under the law, you, the customer are responsible for paying part or all of those unauthorized calls

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System Security Alert

Be aware that criminals called *hackers* may attempt to gain unauthorized access to your communications system and your voice mail system Hackers often try to trick a company's employees into providing them with access to an outside line or an outside operator They may also concentrate their activities in two areas related to the mail system

- They try to dial into a mailbox, then execute a transfer by dialing ⊛⑧ Then they dial an access code, followed by a digit string to either direct dial or access a network operator to complete the call.

- They try to locate unused or unprotected mailboxes and use them as drop-off points for their own messages

System Security Guidelines

To reduce the risk of unauthorized use of your communications and voice mail systems, you should

- require that the System Manager's Password be changed from the factory setting Use a hard-to-guess value.

- delete any unused mailboxes immediately

- require all employees who have voice mailboxes to use passwords to protect their mailboxes

- permit no Outcalling or permit this privilege only for those with legitimate business need

- advise subscribers to change their passwords (a 4-digit password is recommended) when they log into the Voice Mail Service for the first time and frequently thereafter Subscribers can refer to the instructions for changing their passwords in *Using the PARTNER MAIL VS®*.

- familiarize yourself with the impact of the Outcalling feature on system performance and security If Outcalling is not permitted on the system, Outgoing Call Restriction should be set to Inside Only for the voice mail system extensions It is strongly recommended that you use the communications system Call Restriction features (that is, Outgoing Call Restriction used with Allowed and Disallowed Lists) to restrict Outcalling numbers See "Outgoing Call Restriction" in Chapter 4 of *PARTNER MAIL VS® Release 4 Installation and Programming* for details

- monitor your call reporting system records of outgoing calls to identify possible system abuse

You should also

- provide effective physical security for the room containing your telecommunications equipment and the room with administrative tools, records, and System Administration information These areas should be locked when unattended

- provide a secure trash disposal for all sensitive information, including your company's telephone directories, call accounting records, or anything that may supply information about your communications system This trash should be shredded.

- establish a security policy and educate users as detailed in Chapter 1 of *PARTNER MAIL VS® Release 4 Installation and Programming*

- never discuss your telephone system's numbering plan with anyone outside your company

- call the Technical Service Center at 1 800 628-2888 (in the U S) any time a call appears to be suspicious

Form 1: Language

Ⓐ

Language Mode:
- ☐ Monolingual ✓
- ☐ Bilingual

Ⓑ

Monolingual Mode–System Language:
- ☐ U.S. English ✓
- ☐ U.K. English
- ☐ Latin American Spanish
- ☐ Canadian French
- ☐ Other–specify _____

Ⓒ

Bilingual Mode–Primary Language:
- ☐ U.S. English ✓
- ☐ U.K. English
- ☐ Latin American Spanish
- ☐ Canadian French
- ☐ Other–specify _____

Bilingual Mode–Secondary Language:
- ☐ U.S. English
- ☐ U.K. English
- ☐ Latin American Spanish ✓
- ☐ Canadian French
- ☐ Other–specify _____

General Information

- Factory defaults are identified by the ✓ symbol.

- If the system is set for Bilingual Mode, make sure you record the Automated Attendant Day Menu Prompts and Night Menu Prompts and Announcements (if any) in both the Primary and Secondary Languages. Also, subscribers can record two personal greetings—one in the Primary Language and another in the Secondary Language.

- Subscribers can have a Mailbox Language different from the languages selected here. Mailbox Language is specified on Form 2.

Completing this Form

Ⓐ Language Mode   Check "Bilingual" if the Language Mode should be set to Bilingual. If you check Bilingual, also see Ⓒ below; if not, see Ⓑ.

Ⓑ Monolingual Mode—System Language   Check the Primary language desired if different from the default.

Ⓒ Bilingual Mode—Primary Language   Check the Primary Language desired if different from the default.

Bilingual Mode—Secondary Language   Check the Secondary Language desired if different from the default.

Programming Language

- To program the Language Mode, as well as the System Language in Monolingual Mode *or* the Primary and Secondary Languages in Bilingual Mode, dial ⑦ from the Programming Main Menu.

Form 2: Mailbox Assignments

Ⓐ Mailbox	Ⓑ Subscriber Name	Ⓒ Mailbox Language	Ⓓ Outcalling Assigned
10 ✓			
(11 ✓)			
(12 ✓)			
(13 ✓)			
(14 ✓)			
(15 ✓)			
(16 ✓)			
(17 ✓)			
(18 ✓)			
(19 ✓)			
(20 ✓)			
(21 ✓)			
(22 ✓)			
(23 ✓)			
(24 ✓)			
(25 ✓)			

Ⓐ Mailbox	Ⓑ Subscriber Name	Ⓒ Mailbox Language	Ⓓ Outcalling Assigned
(26 ✓)			
(27 ✓)			
(28 ✓)			
(29 ✓)			
(30 ✓)			
(31 ✓)			
(32 ✓)			
(33 ✓)			
(34 ✓)			
(35 ✓)			
(36 ✓)			
(37 ✓)			
(38 ✓)			
(39 ✓)			
(40 ✓)			

General Information

- Factory defaults are identified by the ✓ symbol.

- The system comes with a predetermined number of mailboxes. The optional Mailbox Expansion Card doubles the capacity.

- Mailbox 10 is reserved for the receptionist at extension 10 and cannot be changed.

- Mailbox 10 provides 60 minutes of message recording time. All other mailboxes provide 20 minutes of message recording time.

- For system security, mailboxes should be deleted where they are not needed; for example, mailboxes should be deleted for extensions in use by auxiliary equipment (such as a fax or doorphone) and the extensions assigned to the VMS Hunt Group.

- Guest mailboxes can be created for users who don't have their own phone by assigning an unused extension number as the mailbox number. Unused extension numbers include: 1) vacant extension jacks in installed 206 modules and 2) extensions in your DIAL plan higher than the last extension jack in the last installed 206 module. See "Guest Mailboxes" in Chapter 5 for more information.

Completing this Form

Ⓐ **Mailbox** To assign a mailbox to an extension other than the factory default, cross out the factory default and write in the extension to be used.

- For PARTNER PLUS, use an extension number from 11-33.

- For PARTNER Advanced Communications System, use an extension number from 11-41.

- For PARTNER II or PARTNER 48, use an extension number from 11-57.

To mark an unused mailbox for deletion without assigning an extension, cross out the factory default.

Ⓑ **Subscriber Name** For every mailbox in use, write the name of the mailbox subscriber.

Ⓒ **Mailbox Language** For each mailbox that requires a language different from the System Language or Primary Language indicated on Form 1, write the name of the language in this space. Supported languages are listed on Form 1.

Ⓓ **Outcalling Assigned** For each mailbox in use, indicate whether Outcalling is assigned.

Programming Mailboxes

You can change a mailbox assignment by deleting an existing mailbox and creating a new one.

- To program mailboxes, dial ④ from the Programming Main menu.

Form 3: Menu Definition

Required for Automated Attendant Service

(A) Description	(B) Selector Code	(C) Range of Extensions for Direct Extension Transfer	(D) Ext. # or Group # for Selector Code Transfer, or Announcement #
	1	(10–19 ✓)	
	2	(20–29 ✓)	
	3	(30–39 ✓)	
	4	(40–49 ✓)	
	5	(50–57 ✓)	
	6		
	7	(71–74, 771–776 ✓)	
	8		
	9	Transfer to Mailbox 10 ✓	

General Information

- Factory defaults are identified by the ✓ symbol.

- This Menu Definition applies to both the Day and Night Menu prompts.

- The **Selector Code** is the first digit dialed by the caller in response to the menu prompts.

- In **Direct Extension Transfer**, Selector Codes 1–5 and 7 represent the first digit for a range of extensions. These Selector Codes let callers dial extension numbers directly.

- In **Selector Code Transfer**, Selector Codes 1–9 represent a specific extension, Group Calling number, (if available) or Hunt Group number to which the caller will be transferred. Use the following values:

PARTNER Plus:	10–33 or 771–776
PARTNER Advanced:	11–41, 71–74, or 771–776
PARTNER II:	10–57, 71–74, or 771–776
PARTNER 48:	10–57, 71, or 771–776

  Selector Code Transfer lets callers dial a single digit to reach a single extension or group, such as the VP of Sales at extension 37 or the order processing operators assigned to Hunt Group 774.

- Selector Code 9 lets callers transfer directly to mailbox 10 (receptionist mailbox) where they can leave a message.

- The Description and Selector Code number from this form will be used to complete the Day and Night Menu Prompts (Forms 4, 4A, 5, and 5A).

- For Announcement entries in **Description, Selector Code**, and **Announcement #** of this form will be used to complete Forms 3A and 3B.

Completing this Form

For Direct Extension Transfer...

(A) Description   Write "Direct Extension Transfer."

(C) Range of Extensions for Direct Extension Transfer
Leave the factory default.

(D) Ext. # or Group # for Selector Code Transfer...Leave blank.

For Selector Extension Transfer...

(A) Description   Write the name of the person or group to receive the transfer.

(C) Range of Extensions for Direct Extension Transfer
Cross out the factory default if you want the caller to dial the corresponding Selector Code to transfer to the extension, announcement, or group identified in (D) below.

(D) Ext. #, or Group # for Selector Code Transfer...Write the extension, announcement, or group number to receive the transfer.

For Announcement...

(A) Description   Write "Announcement."

(C) Range of Extensions for Direct Extension Transfer
Cross out the factory default if you want the caller to dial the corresponding Selector Code to hear the Announcement identified in (D) below.

(D) Announcement #   Write the Announcement number (1 or 2).

Form 3: Menu Definition

Programming the Menu

- To program the menu definition, dial ③ from the Programming Main Menu and select the Day Menu.

After defining the menu, the system will prompt you to record the menu prompt. See Form 4 for the Day Menu Prompt and Form 5 for the Night Menu Prompt; for Bilingual Mode, also see Forms 4A and 5A. See Form 3A for Automated Attendant Announcement(s); for Bilingual Mode, also see Form 3B.

Form 3A: Automated Attendant Announcement—
System Language or Primary Language

Required if Selector Code Transfer is set to Announcement

Announcement # _____ :

Announcement # _____ :

General Information

■ After the Announcement plays, you can program the system to hang up or to offer callers the option of pressing *4 (to repeat this Announcement), *7 (to return to the Main Menu), *8 (to transfer to an extension), or 0.

■ If the system is set for Bilingual Mode, let callers know they can switch the language they hear while listening to the Announcement. For example, "Para español, marque * 1."

■ Announcements can supply frequently requested information so that your staff is free to assist customers or to perform other tasks more efficiently.

■ An Announcement can be up to four minutes long.

Completing this Form

Write the Announcement and its number in the space provided.

Recording the Announcement(s)

■ To record the Announcement, dial ③ from the Programming Main Menu.

Form 3B: Automated Attendant Announcement—Secondary Language

Required for Bilingual Mode only if Selector Code transfer is set to Announcement

Announcement # _____ :

Announcement # _____ :

General Information

■ After the Announcement plays, you can program the system to hang up or to offer callers the option of pressing *4 (to repeat this Announcement), *7 (to return to the Main Menu), *8 (to transfer to an extension), or 0.

■ Let callers know they can switch to the Primary Language while listening to the Announcement. For example, "For English, press * 1."

■ Announcements can supply frequently requested information so that your staff is free to assist customers or to perform other tasks more efficiently.

■ An Announcement can be up to four minutes long.

Completing this Form

Write the Announcement and its number in the space provided.

Recording the Announcement(s)

■ To record the Announcement, dial ③ from the Programming Main Menu.

Form 4: Day Menu Prompt—
System Language or Primary Language

Required if VMS Hunt Schedule is set to Day Only or Always

General Information

- The Day Menu Prompt plays to callers when the VMS Hunt Schedule is set to Day Only or Always and Night Service is off. The Day Menu Prompt and the Night Menu Prompt use the *same* Menu Definition.

- The Day Menu Prompt should contain a welcome and a list of menu options.

- The welcome should introduce the company. For example, "Thank you for calling the Any Travel Agency."

- If the system is set for Bilingual Mode, let callers know they can switch the language they hear while on the call. For example, "Para español, marque * 1."

- The menu options should contain instructions that correspond to the Menu Definition set up on Form 3.

  - If callers can dial extension numbers (Direct Extension Transfer), the prompt should instruct callers to dial the extension number. For example, "If you know the extension of the person you want to reach, dial it now."

  - If callers can dial a single digit to transfer to an extension or group (Selector Code Transfer), the prompt should provide instructions such as "To speak to someone in sales, press 6."

  - If callers can can choose an Announcement, include that information. For example, "For directions to our office, press 4."

It is recommended that you keep the number of menu options to 5 or less to avoid confusing the caller.

Completing this Form

Write the message that you want callers to hear when they call during normal business hours, including the instructions to the caller for selecting menu options.

Suggested options include:

- "Remain on the line for assistance."

- "Dial 0 for assistance."

- "To hear this menu again, dial * 4."

Recording the Day Menu Prompt

- To record the Day Menu Prompt, dial ③ from the Programming Main Menu.

Form 4A: Day Menu Prompt—Secondary Language

Required for Bilingual Mode only if VMS Hunt Schedule is set to Day Only or Always

General Information

- The Day Menu Prompt plays to callers when the VMS Hunt Schedule is set to Day Only or Always and Night Service is off. The Day Menu Prompt and the Night Menu Prompt use the **same** Menu Definition.

- The Day Menu Prompt should contain a welcome and a list of menu options.

- The welcome should introduce the company. For example, "Thank you for calling the Any Travel Agency."

- Let callers know they can switch back to the Primary Language. For example, "For English, press * 1."

- The menu options should contain instructions that correspond to the Menu Definition set up on Form 3.

  - If callers can dial extension numbers (Direct Extension Transfer), the prompt should instruct callers to dial the extension number. For example, "If you know the extension of the person you want to reach, dial it now."

  - If callers can dial a single digit to transfer to an extension or group (Selector Code Transfer), the prompt should provide instructions such as "To speak to someone in sales, press 6."

  - If callers can can choose an Announcement, include that information. For example, "For directions to our office, press 4."

It is recommended that you keep the number of menu options to 5 or less to avoid confusing the caller.

Completing this Form

Write the message that you want callers to hear when they call during normal business hours, including the instructions to the caller for selecting menu options.

Suggested options include:

- "Remain on the line for assistance."

- "Dial 0 for assistance."

- "To hear this menu again, dial * 4."

Recording the Day Menu Prompt

- To record the Day Menu Prompt, dial ③ from the Programming Main Menu.

Form 5: Night Menu Prompt—
System Language or Primary Language

Required if VMS Hunt Schedule is set to Night Only or Always

General Information

- The Night Menu Prompt plays to callers when the VMS Hunt Schedule is set to Night Only or Always and Night Service is on. The Night Menu Prompt and the Day Menu Prompt use the *same* Menu Definition.

- The Night Menu Prompt should contain a welcome and a list of menu options.

- The welcome should introduce the company. For example, "You have reached the Any Travel Agency. Our hours are 9 AM to 5 PM, Monday through Friday."

- If the system is set for Bilingual Mode, let callers know they can switch the language they hear while on the call. For example, "Para español, marque * 1."

- The menu options should contain instructions that correspond to the Menu Definition set up on Form 3.

    - If callers can dial extension numbers (Direct Extension Transfer), the prompt should instruct callers to dial the extension number. For example, "If you know the extension of the person you want to reach, dial it now and leave a message."

    - If callers can dial a single digit to transfer to an extension or group (Selector Code Transfer), the prompt should provide instructions such as "To leave a message for Pat, press 6." Keep in mind that there are no group mailboxes.

    - If Selector Code 9 is left as the default, the prompt should instruct callers to press 9 to leave a message with the receptionist.

It is recommended that you keep the number of menu options to 5 or less to avoid confusing the caller.

Completing this Form

Write the message that you want callers to hear when they call after normal business hours, including instructions to the caller for selecting menu options.

Suggested options include:

- "Dial 9 or remain on the line to leave a message."

- "To hear this menu again, dial * 4."

Recording the Night Menu Prompt

- To record the Night Menu Prompt, dial ③ from the Programming Main Menu.

Form 5A: Night Menu Prompt—Secondary Language

Required for Bilingual Mode only if VMS Hunt Schedule is set to Night Only or Always

General Information

- The Night Menu Prompt plays to callers when the VMS Hunt Schedule is set to Night Only or Always and Night Service is on. The Night Menu Prompt and the Day Menu Prompt use the *same* Menu Definition.

- The Night Menu Prompt should contain a welcome and a list of menu options.

- The welcome should introduce the company. For example, "You have reached the Any Travel Agency. Our hours are 9 AM to 5 PM, Monday through Friday."

- Let callers know they can switch back to the Primary Language. For example, "For English, press *1."

- The menu options should contain instructions that correspond to the Menu Definition set up on Form 3.

  - If callers can dial extension numbers (Direct Extension Transfer), the prompt should instruct callers to dial the extension number. For example, "If you know the extension of the person you want to reach, dial it now and leave a message."

  - If callers can dial a single digit to transfer to an extension or group (Selector Code Transfer), the prompt should provide instructions such as "To leave a message for Pat, press 6." Keep in mind that there are no group mailboxes.

  - If Selector Code 9 is left as the default, the prompt should instruct callers to press 9 to leave a message with the receptionist.

It is recommended that you keep the number of menu options to 5 or less to avoid confusing the caller.

Completing this Form

Write the message that you want callers to hear when they call after normal business hours, including instructions to the caller for selecting menu options.

Suggested options include:

- "Dial 9 or remain on the line to leave a message."

- "To hear this menu again, dial * 4."

Recording the Night Menu Prompt

- To record the Night Menu Prompt, dial ③ from the Programming Main Menu.

Form 6: Line Ownership

Required if VMS Line Coverage exists for one or more lines

Ⓐ Line #	**Ⓑ** Telephone Number	**Ⓒ** Line Owner (Subscriber Name)	**Ⓓ** Mailbox

General Information

■ Lines in the system are assigned either ownership or Automated Attendant Service coverage—a single line *cannot* be assigned both types of coverage.

■ Note that more than one line may be assigned to the same mailbox, but a single line cannot be assigned to more than one mailbox.

■ Lines that are assigned ownership typically are used for personal lines or outside access to the voice messaging system if Automated Attendant Service is not used. If the company has users who need to access mailboxes when no one is around to transfer them to their mailboxes, you can set up the system as follows:

   – Assign extension 10 as owner of the covered lines.

   – Instruct users to press ✱ 7 when they hear the personal greeting from extension 10.

■ See the communications system planning forms to determine line numbers, telephone numbers, and line owners' extensions.

■ As an alternative to VMS Line Coverage you can use Extension Line Coverage. See Chapter 5 for more information.

Completing this Form

Ⓐ Line #   Write the number of the outside line to be covered by the voice mailbox of the line owner.

■ For PARTNER PLUS, specify an outside line number from 01–12.

■ For PARTNER Advanced, specify an outside line number from 01–15.

■ For PARTNER II or PARTNER 48 specify an outside line number from 01–24.

Ⓑ Telephone Number   Write the telephone number of the outside line to be covered.

Ⓒ Line Owner   Write the name of the person responsible for picking up messages on this line. This is a subscriber from Form 2, "Mailbox Assignments."

Ⓓ Mailbox   Write the mailbox number assigned to the subscriber.

Programming Line Ownership

■ To program line ownership, dial 6 from the Programming Main Menu.