NetVanta Unified Communications

NetVanta Unified Communications Server

Personal Business Assistant User Guide

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Conventions

NOTE *Notes provide additional useful information.*

CAUTION *Cautions signify information that could prevent service interruption or damage to equipment.*

WARNING *Warnings provide information that could prevent injury or endangerment to human life.*

Below is a list of naming conventions used in this document. The first example shows the naming convention used for the first occurrence; the second example shows the naming convention used for subsequent occurrences.

Type	Convention Example
Operating System*	Microsoft ® Windows Server ® 2008 operating system version R2 or later ***or*** Windows Server 2008 R2 or later
Server Software	NetVanta Unified Communications Server software ***or*** NetVanta UC Server software NetVanta Unified Communications Live Attendant Server or Live Attendant Server
Client Software	NetVanta Unified Communications Client software ***or*** NetVanta UC Client software NetVanta ucCompanion Desktop Presence client software ***or*** ucCompanion NetVanta ucCompanion Live Attendant or Live Attendant NetVanta ucCompanion Soft Phone or Soft Phone
Hardware	Server computer - the computer on which the server software is installed. Client computer - the computer on which the client software is installed.
NetVanta Unified Communication Products	NetVanta Unified Communications Server ***or*** NetVanta UC Server NetVanta Business Communications System ***or*** NetVanta BCS NetVanta Enterprise Communications Server ***or*** NetVanta ECS NetVanta Business Application Server ***or*** NetVanta BAS NetVanta UC Live Attendant Server or Live Attendant Server

* Other operating systems may be mentioned in this document. They will follow a format similar to the one provided.

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Table of Contents

1 Getting Started . . . 7
Overview . . . 7
Conventions . . . 9
Requirements . . . 10
Starting the Application . . . 10
First-time Access using the Desktop . . . 10
Changing your Password . . . 13
Accessing your Mailbox for the First Time . . . 14

2 Customizing your Mailbox . . . 17
Overview . . . 17
Customizing your Mailbox using your Telephone . . . 17
Customizing your Mailbox using your Computer . . . 22

3 Customizing Incoming Call Options . . . 31
Overview . . . 31
Managing Extensions and Identities Options . . . 31

4 Managing Messages using your Telephone . . . 33
Overview . . . 33
Accessing your Mailbox using your Telephone . . . 33
Listening to Messages Remotely . . . 33
Sending Messages from your Mailbox . . . 35
Caller Options . . . 39

5 Managing Messages Using Your Computer . . . 41
Overview . . . 41
Managing Messages in Microsoft Outlook . . . 41
Managing Messages in Lotus Notes . . . 47
Managing Messages in the Mailboxes Menu in NetVanta UC Client . . . 53

6 Faxing . . . 57
Overview . . . 57
Sending Faxes . . . 58
Receiving Faxes . . . 81

7 Creating Distribution Lists . . . 83
Overview . . . 83

8 Creating Custom Call Answering Services . . . 85
Overview . . . 85
Managing Services . . . 86
Using the Service Editor . . . 90
Working with Elements to Build a Service . . . 92
Customizing Services using Parameters . . . 95
Validating Services . . . 95
Troubleshooting Services . . . 96

9 Using Elements to Create Call Answering Services . . . 97
Service Element Settings and Features . . . 97
Using Standard Elements . . . 101
Using Advanced Elements . . . 119

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10 Using Announcements in Call Answering Services 133
Using Prerecorded Announcements 133
Recording Announcements 137
Managing Announcements 145

11 Using Databases in Call Answering Services 147
Overview 147
Managing Data Sources 148
Accessing Data using Database Service Elements 159
Using Database Elements 163

12 Importing and Exporting 173
Overview 173
Starting the Import/Export Wizard 173
Importing and Exporting Items 173

13 Setting Options 175
Setting General Options 175
Setting Message Delivery Options 176
Customizing your Mailbox 178
Setting Integrated Messaging Options 180
Compressing Voice Messages 181

14 Troubleshooting 183
Overview 183
Troubleshooting Message Waiting Indicators 183
Troubleshooting the NetVanta UC Server 184
Using the NetVanta UC Server Logs 185
Accessing Documentation and Training 191
Accessing Technical Support 191

15 Appendix A - Installing the NetVanta UC Client Application 193

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1 Getting Started

This chapter introduces the NetVanta Unified Communications Server client application in Personal Business Assistant mode and presents some basic operations. This chapter covers the following topics:

- *Overview on page 7*
- *Conventions on page 9*
- *Requirements on page 10*
- *Starting the Application on page 10*
- *First-time Access using the Desktop on page 10*
- *Changing your Password on page 13*
- *Accessing your Mailbox for the First Time on page 14*

Overview

The UC Server application in Personal Business Assistant mode provides not only the most commonly used unified communications features, but also the opportunity to design your own auto attendent services and to record customized announcements. Master the basic functions and manage your personalized greetings and delivery features with efficiency and ease, right from your desktop. The user interface is remarkably user-friendly.

The UC Server is integrated with Microsoft Outlook so that you can access voice, fax, and email messages from a single inbox. The type of each new message is signaled by a distinctive icon that you can recognize at a glance, just as you are familiar with the envelope that indicates reception of an email message.

You can use a local or remote telephone to log on to the system and retrieve not only voice messages but email. With a single keypad command, the text-to-speech engine reads email messages to you over the phone. You are also informed if you have received fax messages.

Personal Assistant mode is the default user setting. If you want to customize a call flow in greater detail, ask your system administrator for information about Personal Business Assistant mode.

Please note that your system administrator needs to set your call answering mode to Personal Business Assistant for you to have access to this mode.

All users on the system manage, and are managed by, user profiles, identities, and authorizations.

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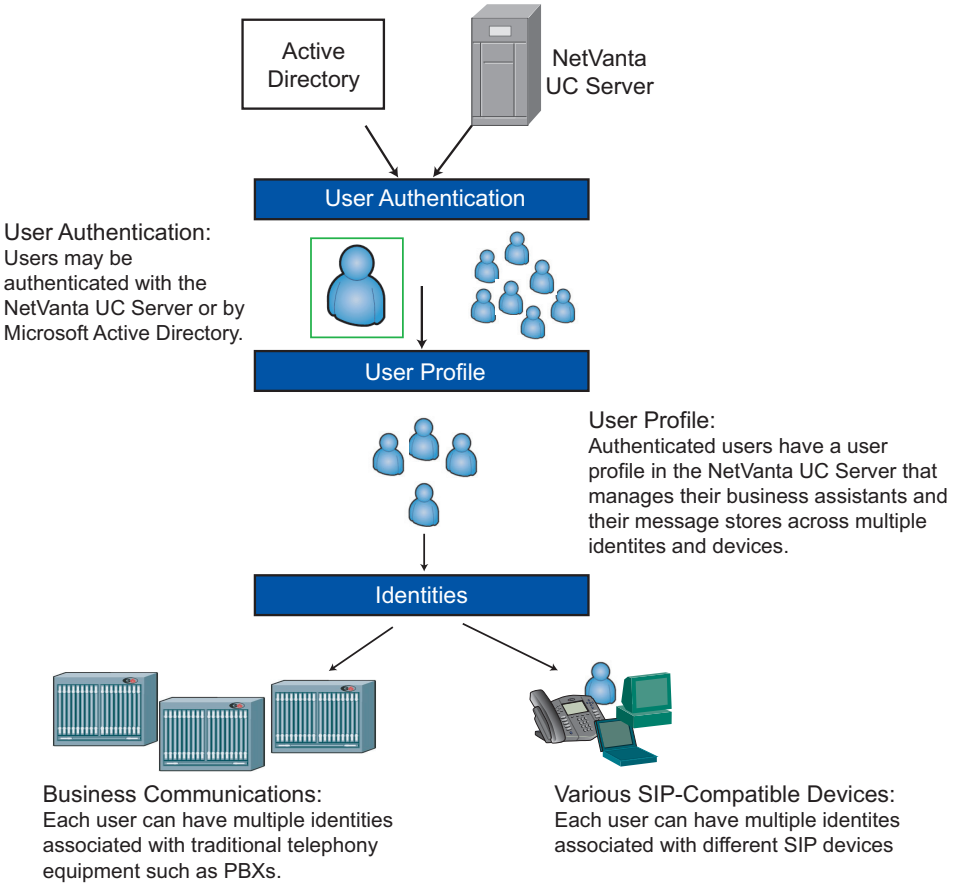

Authorizations give some users access to the profiles of other users, for management purposes. Likewise, users can have access to any number of other users, provided they have been granted authorization to do so.

Users can have any number of identities on the system, such as an extension number. Through the user profile, users can manage the identities that are associated with their profile.

The UC Server is integrated with Active Directory.

> **NOTE** *For more information about the UC Server, refer to the ADTRAN website at* http://kb.adtran.com. *Here you will find reference materials, and a quick reference card.*

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Conventions

Document conventions

Text

Bold font is used to indicate important input data and keywords.

Shortcut menus

Steps for procedures generally instruct readers to use shortcut menus, although commands can also be made using menus and toolbar buttons.

To obtain a shortcut menu, right-click the icon or folder you want to access then select the command you want.

Voice recording conventions

Computer audio card device

Telephone handset device

> *You can select the icon of the audio device when you play or record. The settings are saved and the last device that you selected is automatically used.*

Record button

Stop button

Play button

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Requirements

Before proceeding, you need to get the following information from your network administrator:

- The name of the server to which to connect
- The UC Server access number
- Your default password for performing mailbox management
- The system-defined key used to perform remote mailbox management

Starting the Application

The application might already be installed on your computer. If it is not, ask your network administrator for assistance, or refer to Appendix B in this manual for instructions about how to do the installation.

To start the application

1. Select Windows **Start > Programs**.
2. Select NetVanta UC client.
3. Select **UC Client** and the Choose UC Server dialog box opens.
4. Type the UC Server name in the **Server name** text box.
5. Enable the **Save server as default check box**, and then select **OK**. In the Server login dialog box, type your user name and password. From now on, the application remembers the server name so that you do not have to enter it again. When you start the application for the first time, the First-time Access Wizard Welcome menu appears.

First-time Access using the Desktop

> **NOTE** *If you change your password using the telephone and want to change it again in the application, you must restart the application to synchronize the password.*

The First-time Access Wizard guides you through the following procedures:

- Changing your password
- Recording your greetings

If you are an IMAP user, you can also configure your IMAP user name and password. If you are not an Exchange user, the wizard allows you to change the contact system if it finds more than one compatible

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contact system (for example, Outlook Express and Outlook).

> **NOTE** *For Lotus Notes integration, the contacts default to Microsoft Exchange. For information about Lotus Notes integration, refer to the Lotus Notes integration document, which is available online at* http://kb.adtran.com..

To change your password and record your greetings

1. Start the Client application to start the First-time Access Wizard.
2. Select **Next** and the Mailbox dialog box opens.
3. Type a numeric password in the **Password** text box. This is the password that you use to access your mailbox using the telephone. Your password must contain only digits. It must be at least four digits long.
4. In the **Re-enter** text box, type the numeric password again.
5. Select **Next** and the Identifier menu appears. The identifier greeting consists of your name. It is played to callers who reach your mailbox.
6. Make sure that the audio device you want is selected.

7. Select **record**. If you are using your telephone, wait for the beep before you begin to record. The timer runs as you record.
8. Select **stop** when you have finished. If you use the telephone, you can hang up the phone or press the Release button on the phone to end the recording.
9. Select **Next** to open the Greeting dialog box.
10. Choose one of the following greeting types to record:
    - **Use standard greeting** plays a default greeting to callers.
    - **Record same greeting for internal and external callers** allows you to record a single greeting for all callers.
    - **Record different greetings for internal and external callers** allows you to record two messages, one for callers from within your organization, the other for callers from outside your organization.
11. Select **Next**.
    - If you select **Use standard greeting**, go to step 16.
    - If you select **Record same greeting for internal and external callers**, the Internal/External Greeting menu appears.
    - If you select **Record same greeting for internal and external callers**, the Internal Greeting dialog box opens.

    In the text box, you can type the greeting that you want to record. This is useful for eliminating pauses when you record.

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12. Make sure that the audio device you want is selected.

13. Select **record**. If you are using a telephone, wait for the beep before you begin to record. The timer runs as you record.
14. Select **stop** when you have finished. If you use the telephone, you can hang up the phone or press the Release button on the phone to end the recording.
15. Select **Next**.
    - If you chose to make two distinct greetings, the External Greeting dialog box opens. Repeat steps 12 to 15 to record an external greeting.
    - If you chose to make a single greeting, the Completion menu appears.

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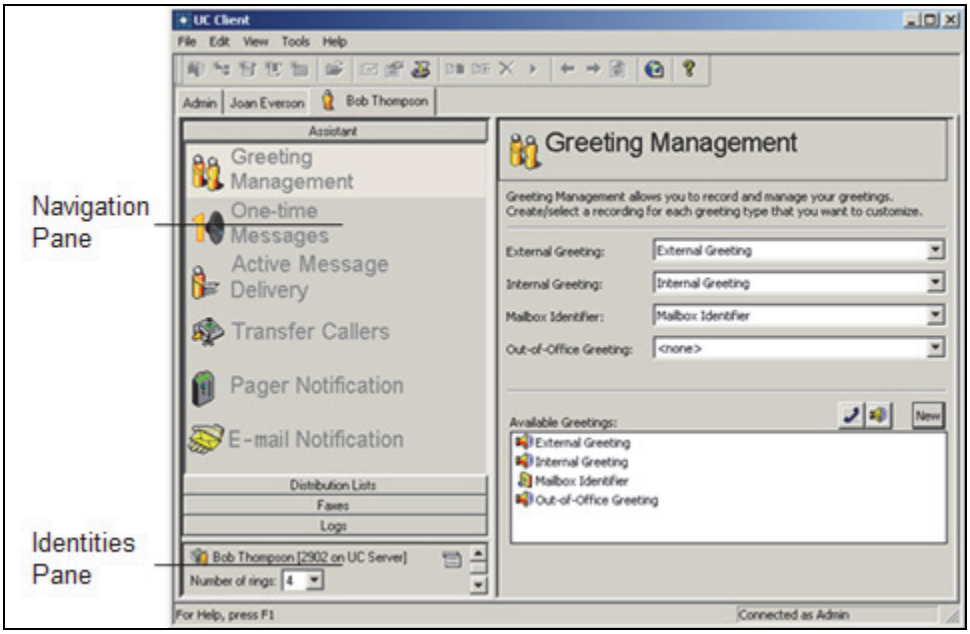
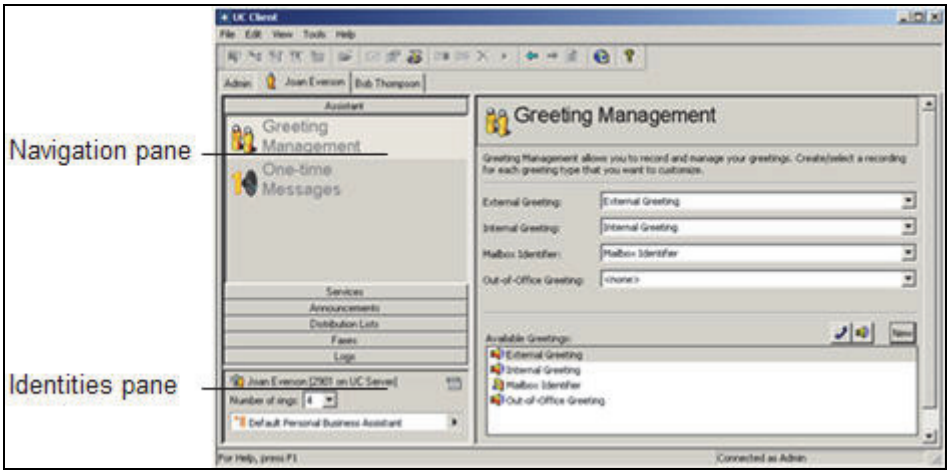
16. Select **Finish**.

    The main Client window opens.





To set the number of rings on your telephone

In the **Number of rings** box in the Identities pane, select the number of rings for the identity that you want. The UC Server answers the telephone after the number of rings that you specify.

Changing your Password

If your user profile menu has access to multiple profiles, you can view those profiles as tabs across the top

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of the window. You can change the password only for the owned user profile.

> **NOTE** *If you are an Active Directory user, the change user password option is unavailable.*

To change the password

1. Select the tab of the profile for which you want to change the password.
2. Select **Tools > Change User Password**.
3. In the **Change Password** dialog box, do all of the following:
   - In the **Old password** box, type the old password.
   - In the **New password** box, type the new password.
   - In the **Confirm new password** box, retype the new password.

   The new password takes effect immediately.

Accessing your Mailbox for the First Time

You can access your mailbox using your telephone extension or a remote telephone. To access your mailbox using your telephone extension, you need the UC Server access number and your default password. You can obtain these from your system administrator.

To access your mailbox using your telephone extension

1. On your telephone keypad, enter the UC Server access number.
2. Enter your password followed by #. You are prompted to change your password.

> **NOTE** *If you have already changed your password and recorded your greetings using the First-time Access Wizard, you can enter your password followed by #.*

3. Follow the prompts and record your greetings. If you do not record any greetings now, you are not prompted to do so the next time you call in to manage your mailbox.

> **NOTE** *To access your mailbox using a remote telephone you need the system-defined key for remote mailbox management. You can get this from your system administrator. You must also have your extension number and password.*

To access your mailbox using a remote telephone

1. Call your workplace number that has the UC Server as the auto attendant.
2. At the prompt, press the system-defined key used to perform remote mailbox management.

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3. Enter your extension number and then your password at the prompt. The message summary lists the number and type of messages in your mailbox.

> **NOTE** *You can press # after you enter the extension and password. Pressing # speeds up logging into your mailbox.*

> **NOTE** *Your system administrator might have set up a different behavior. Contact your administrator for more information.*

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2 Customizing your Mailbox

Overview

You can customize your mailbox, such as recording greetings, using either a telephone or UC Client. There are other features which can only be enabled using either a telephone or UC Client, such as setting up a one-time message for a specific caller, using UC Client. For more information on customizing your mailbox and using mailbox features, refer to the following sections:

- *Customizing your Mailbox using your Telephone on page 17*
- *Customizing your Mailbox using your Computer on page 22*

Customizing your Mailbox using your Telephone

You can customize your mailbox in many ways including creating greetings, changing your password, and changing the amount and type of information that plays about your messages. You can adjust the message waiting light on your phone, and you can also create distribution lists.

You can use your telephone to manage the following mailbox items:

- Recording and selecting greetings
- Changing your password
- Changing message information
- Changing the message summary
- Changing the notification option
- Changing message sorting options
- Managing distribution lists

You can perform mailbox management using a remote telephone or your workplace extension. For information about accessing your mailbox using a telephone, refer to *Accessing your Mailbox using your Telephone on page 33*.

When calling from your extension, enter the access number set up by your network administrator. This is not the same number as the system-defined key that you use when performing remote mailbox management. You can obtain the access number from your system administrator. After you enter the access number, you are prompted to enter your password.

The following management tasks assume that you are accessing the system from your workplace extension.

Recording and selecting greetings

Using your telephone, you can record and listen to greetings, and select a type of greeting to play to callers.

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You cannot select a greeting unless it has an audio recording. If you try to select a greeting without a recording, you are prompted to record one.

Disabling a greeting does not delete it. You can enable a greeting at any time. Recording a new greeting replaces an existing one.

If the out-of-office greeting is enabled, the user is prompted to turn it off or leave it on. For information about managing greetings using the computer, refer to *Customizing your Mailbox on page 17*.

To manage your greetings

1. From the main menu, select **4**: Change mailbox options.
2. From the **Change mailbox options** menu, select **1**: Manage greetings.
3. From the **Manage greetings options** menu, select one of the following:
   - **1** — external greeting
   - **2** — internal greeting
   - **3** — mailbox identifier
   - **4** — out-of-office greeting
   - **0** — help menu
   - ***** — return to previous menu

   The greeting status plays (on or off).
4. Select one of the following:
   - **1** — record
   - **2** — listen
   - **3** — turn on/off
   - ***** — cancel
5. After the tone, record your greeting, and then press #.
6. Select one of the following:
   - **1** — keep the greeting
   - **2** — record the greeting again
   - **3** — review the greeting
   - ***** — cancel

NOTE *The maximum length of a recorded greeting is 15 minutes.*

NOTE *If the Out of Office greeting is not enabled, you cannot listen to the greeting. You are informed that no greeting is recorded.*

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Changing your password

To change your password

1. From the main menu, select **4**: Change mailbox options.
2. From the **Change mailbox options** menu, select **2**: Change password.
3. Enter the new password followed by #.
4. Confirm the new password by doing one of the following:
   - **1** — keep the password
   - **2** — re-enter the password
   - ***** — cancel

Changing message information

Message information plays before each message. For voice messages, information includes the caller ID and the date and time that the message was received. For email messages, the sender and subject title are included. The default setting for Message information is **on**. If you change this option to off, you do not receive message information before you review each message.

To change message information

1. From the main menu, select **4**: Change mailbox options.
2. From the **Change mailbox options** menu, select **3**: Change status options.
3. From the **Change status options** menu, select **1**: Turn message information on or off.

Changing the message summary

A message summary plays as soon as you enter your password. The Message Summary lists the number and type of messages you have received and whether they are new or saved. There are three modes for message summary. They are:

Disabled	No message summary is provided.
Quick	The message summary provides limited information. For example, “You have five new messages and six saved messages.” This is the default mode.
Verbose	The message summary provides detailed information. For example, “You have five new voice messages, four new fax messages, 30 new email messages, and 50 saved messages.”

To change the message summary

1. From the main menu, select **4**: Change mailbox options.
2. From the **Change mailbox options** menu, select **3**: Change status options.

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3. From the **Change status options** menu, select **2**: Obtain message summary options.
4. Select one of the following:
   - **1** — Disable
   - **2** — Set to quick mode
   - **3** — Set to verbose mode
   - ***** — Cancel

Changing the notification option

When you receive a message, an alert is displayed on your telephone that notifies you that you have mail. This notification option allows you to turn the alert light on or off.

To change the notification option

1. From the main menu, select **4**: Change mailbox options.
2. From the **Change Mailbox Options** menu, select **4**: Notification option.
3. Select one of the following:
   - **1** — turn notification on
   - **2** — turn notification off

Changing message sorting options

Message sorting options allow you to listen to your messages in the order that you choose. Listening to voice and fax messages only is the default option.

To change message sorting options

1. From the main menu, select **4**: Change mailbox options.
2. From the **Change mailbox options** menu, select **5**: Message sorting options.
3. Select one of the following:
   - **1** — plays voice and fax message only
   - **2** — plays voice and fax messages first, and then email messages
   - **3** — plays all messages in the order that they were received

Managing distribution lists

You can use system and personal distribution lists over the telephone. Create, edit, and delete distribution lists using the telephone. For more information about distribution lists, refer to *Creating Distribution Lists on page 83*.

To create a distribution list over the telephone

1. From the main menu, select **4**: Change mailbox options.
2. From the **Mailbox options** menu, select **6**: Distribution list options.

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3. From the **Distribution list** menu, select **1**: Create a new distribution list.
4. Enter the number of the new distribution list.
5. Select one of the following:
   - **1** — confirm
   - **2** — cancel

To edit a distribution list over the telephone

1. From the main menu, select **4**: Change mailbox options.
2. From the **Mailbox options** menu, select **6**: Distribution list options.
3. From the **Distribution list** menu, select **2**: Edit distribution list.
4. Enter the distribution list number that you want to edit.
5. Select **1**: Manage distribution list.
6. Select one of the following:
   - **1** — add recipient
   - **2** — remove recipient
   - **3** — list recipients
   - **0** — help
   - ***** — exit to previous menu
7. If you selected 1, to add a recipient, enter the new recipient number, and then select one of the following:
   - **1** — save
   - ***** — cancel
8. If you select 2, to remove a recipient, enter the number of the recipient that you want to remove, and then select one of the following:
   - **1** — delete
   - ***** — cancel

To delete a distribution list over the telephone

1. From the main menu, select **4**: Change mailbox options.
2. From the **Mailbox options** menu, select **6**: Distribution lists options.
3. From the **Distribution lists options** menu, select **3**: Delete distribution list.
4. Enter the number of the distribution list that you want to delete.
5. Select one of the following:
   - **1** — delete
   - ***** — cancel

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Customizing your Mailbox using your Computer

This section explains how to customize your mailbox, such as recording greetings and one-time messages, using UC Client voice message features on your user extension.

You manage all voice message features using the main window or Assistant menu. This menu appears by default when you start the application. You can access voice-messaging features by selecting the feature icons in the navigation pane.

> NOTE
> *For more information on setting mailbox options from your computer, refer to* *Customizing your Mailbox on page 178*.

Recording and selecting greetings

Using the Greeting Management pane, you can create and record new greetings, or play and delete existing greetings. You can manage four types of greetings:

- External greeting
- Internal greeting
- Mailbox identifier greeting
- Out-of-office greeting

Callers from outside your workplace hear the **external greeting**. This greeting is longer and more informative than the internal greeting. Here is an example of an external greeting:

“Thank you for calling [your workplace name]. We are unable to take your call at this time; please leave a message at the sound of the beep and we will get back to you before the end of the day.”

Callers from another extension at your workplace hear the **internal greeting**. This greeting is shorter than an external greeting and can be more informal because it is intended for internal callers. Here is an example of an internal greeting:

“Hi, I’ll be in a meeting all morning, but I’ll get back to you after lunch. Thanks for your patience.”

The **mailbox identifier greeting** consists of your name. Callers hear this greeting when their call is transferred to your extension. The mailbox identifier is always available in the greetings list and you cannot delete it.

Enable the **out-of-office greeting** when you are away from the office for an extended time. The caller cannot interrupt the out-of-office greeting. Callers hear the entire greeting before they can leave a message. You can record an out-of-office greeting and enable it only when you need it. You can re-use the same greeting each time you are out of the office. When you start the application, a notice reminds you that the

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out-of-office greeting is enabled. You can turn it off or leave it on.

> **NOTE** *If you enable the out-of-office greeting, it plays in place of the internal and external greeting. If you record an external greeting but no internal greeting, all callers hear your external greeting. If you record an internal greeting but no external greeting, external callers hear a default greeting. If you do not record any greetings, the following default greeting plays to callers: "We are unable to take your call. Please record a message after the tone."*

Available greetings are listed alphabetically. A new greeting appears at the bottom of the list until you refresh the content pane.

Creating and recording greetings

You can create and record a new greeting, or re-record an existing greeting. There is no limit to the number of greetings that you can create, provided there is enough disk space to accommodate them.

For information about managing greetings using the telephone, refer to *Managing Messages using your Telephone on page 33*.

To create a new greeting

1. In the Available Greetings section, select the **New** button.
2. Type a name for the new greeting.
3. Press **Enter**, and the new greeting appears at the bottom of the list.

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To record a greeting

1. In the Available Greetings list, select the name of the greeting that you want to record.

2. Select the **Record** button next to the greeting that you want to record to open the record Audio box.
3. Choose **replace all** from the Insert New Audio list.
4. Select **record** and record the greeting.
5. Select **stop** when you are finished recording.
6. Select **OK**.

> NOTE *The maximum length of a recorded greeting is 15 minutes.*

Playing and deleting greetings

To play a greeting

1. From the Available Greetings list, select the greeting that you want to play.
2. Make sure that the audio device you want is selected.

3. Select **play** to play the greeting.

To delete a greeting

1. From the Available Greetings list, select the greeting that you want to delete.
2. Select the **trash** button to delete the greeting.
3. Select **Yes** to confirm the deletion.

Re-recording and deleting greetings using the Audio Editor

For more information about using the Audio Editor for advanced management of audio greetings, refer to *Using Announcements in Call Answering Services on page 133*.

To re-record a greeting using the Audio Editor

1. From the Available Greetings list, select the greeting that you want to re-record.
2. Make sure that the audio device you want is selected.

3. Select the advanced button to open the Audio Editor.

Advanced button

> *In the text area of the Audio Editor, you can type the greeting that you want to record. This is useful to eliminate pauses when you are recording.*

4. Select **record** to open the Record Audio box.
5. From the **Insert new audio** list, select a position on the waveform:
   - **At the current position**—records from the marker's position on the waveform (from the beginning, if you did not make a selection)
   - **At the beginning**—records from the beginning
   - **At the end**—records from the end of the current greeting
   - **Replace all**—replaces the current greeting with the new greeting
6. Select **record** and record the greeting.
7. Select **stop** when you are finished recording.
8. Select **OK**.
9. Select **play** to listen to the re-recorded greeting.
10. Select **File > Exit** to close the Audio Editor and update the greeting.

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11. Select **Yes** to update the greeting and return to the Greeting Management pane.

> NOTE *The maximum length of a recorded greeting is 15 minutes.*

To edit a greeting using the Audio Editor

1. From the Available Greetings list, select the greeting that you want to edit.
2. Make sure that the audio device you want is selected.

3. Select the advanced button to open the Audio Editor.

Advanced button

> NOTE *In the text area of the Audio Editor, you can type the greeting that you want to record. This is useful to eliminate pauses when you are recording.*

4. Select the position or area of the waveform that you want to edit.
5. Select **record** to open the Record Audio box.
6. From the Insert new audio list, select one of the following:
   - **In place of the current selection**—replaces the selected area with the new recording
   - **After the current selection**
   - **Before the current selection**
   - **At the current position**—records from the marker's position on the waveform (from the beginning, if you did not make a selection)
   - **At the beginning**—records from the beginning
   - **At the end**—records from the end of the current greeting
   - **Replace all**—replaces the current greeting with the new greeting
7. Select **record** and record the greeting.
8. Select **stop** when you are finished recording.
9. Select **OK**.
10. Select **play** to listen to the edited greeting.
11. Select **File > Exit** to close the Audio Editor and update the greeting.

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12. Select **Yes** to update the greeting and return to the Greeting Management pane.

> NOTE *The maximum length of a recorded greeting is 15 minutes.*

Selecting greetings

For each greeting type, you can specify a greeting from a list of possible greetings. If you select none for a greeting type, the system plays the default greeting.

To specify a greeting

1. On the Greeting Management content pane, select one of the following greeting types:
   - **External greeting**
   - **Internal greeting**—by default, it is the same as the external greeting
   - **Mailbox identifier**—it can be only on or off, there are no other greetings available in the list
   - **Out-of-office greeting**—if you specify an out-of-office greeting, the external and internal greetings are unavailable
2. Select a greeting from the list.

> NOTE *You cannot select a greeting if there is no audio recorded for it.*

Recording one-time messages

The One-time Messages feature allows you to record a message intended for a specific caller. The caller's name and telephone number are recorded in the Contacts list that you maintain in Outlook. You need caller ID to be able to use this feature.

You can change or remove a one-time message that you leave for a caller. However, once a caller has telephoned your extension and heard the one-time message, it is automatically deleted.

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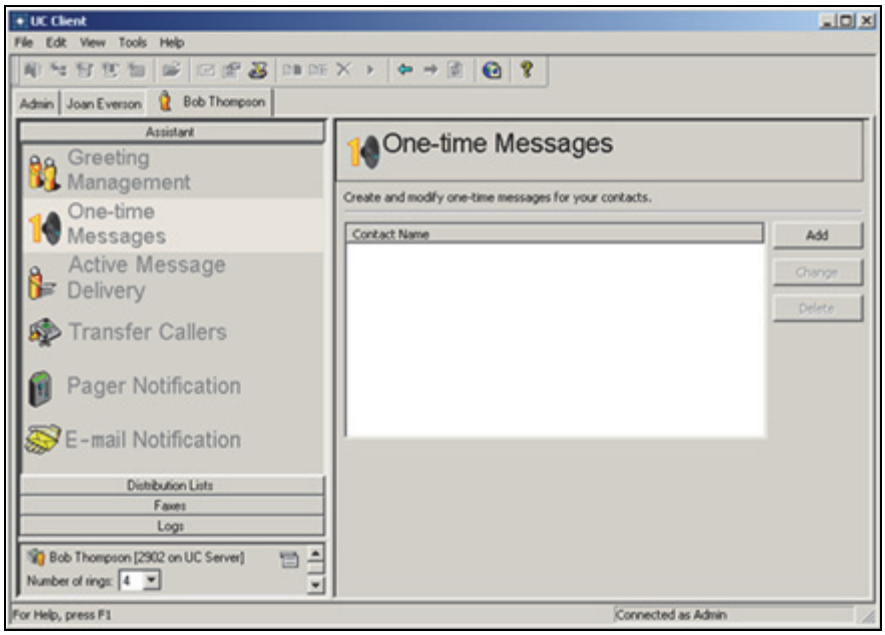
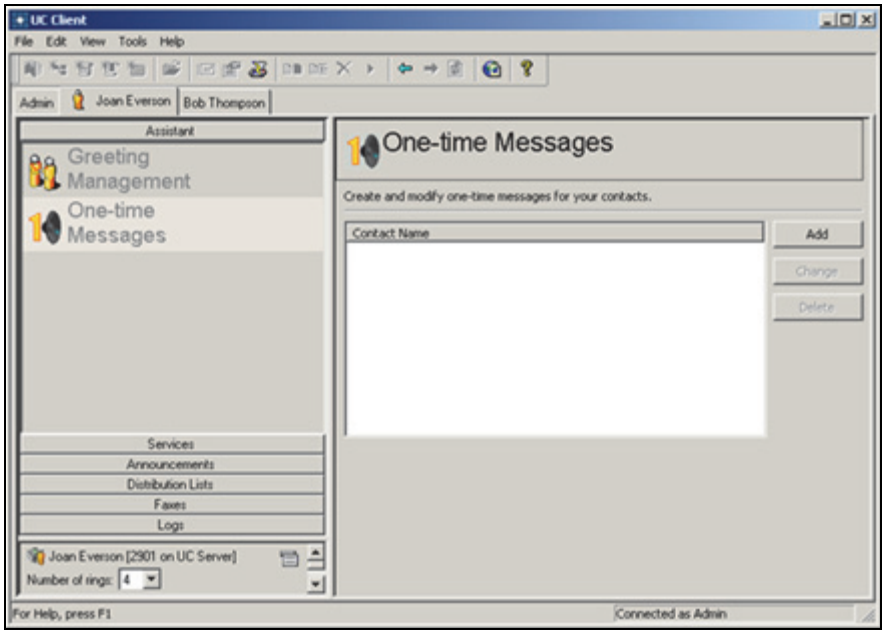
To create a one-time message for a contact

1. In the Assistant navigation pane of the main Client menu, select **One-time Messages** to open the One-time Messages content pane.





2. Select **Add** to open the One-time Messages recording dialog box.

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3. From the **For** list, select the contact that you want to receive the one-time message. The contacts are from the list of contacts that you maintain in Outlook.

> NOTE *In the text area of the One-time Message dialog box, you can type the greeting that you want to record. This is useful to eliminate pauses while you record.*

4. Select **record** to open the Record Audio dialog box.
5. Make sure that the audio device you want is selected.

6. From the **Insert new audio** list, select **at the beginning**.
7. Select **record**. If you are using your telephone, wait for the beep before you begin to record. As you record, the clock runs and the red record button turns grey.
8. Select **stop** when you have finished. If you used your telephone, you can also press the Release button on the phone to end the recording.
9. Select **play** to hear the greeting.
10. Select **OK** to keep the greeting. The contact to receive your one-time message appears in the One-time Messages content pane. Any other contacts that you record a one-time message for are added to this list.

To change a one-time message for a contact

1. In the One-time messages content pane, select the contact for the one-time message that you want to change.
2. Select **Change**.
3. Follow steps 4 to 10 of *To create a one-time message for a contact on page 28*.
4. Select **Done** when you are finished changing the message.

To delete a one-time message

1. In the One-time messages content pane, select the contact whose one-time message you want to delete.
2. Select **Delete**.
3. Select **Yes** to confirm the deletion.

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3 Customizing Incoming Call Options

Overview

This section explains how to manage identities.This section covers the following topics:

• *Managing Extensions and Identities Options on page 31*

Managing Extensions and Identities Options

An identity typically corresponds to a user extension or an email address. When callers dial in to the system, they can access, for example, a user extension or an employee's email address. The Administrator creates and assigns identities. If you have identities assigned, they appear in the identities pane, on the bottom-left of the client window.

You can change the number of rings on an identity, which determines the number of times a call rings on an extension before it is answered by the auto attendant.

To change the number of rings using the Identities pane

1. On the Identities pane, select the **Number of rings** box that corresponds to the identity that you want to change.
2. Select the number of rings that you want for the identity. The default number of rings is **4**.

To edit an active service using the Identities pane

1. On the Identities pane, select the active service icon.

Active Service icon

2. Select **Edit Active Service**. The service that is active on the identity opens in the Service Editor. For information about editing services using the Service Editor, refer to *Creating Custom Call Answering Services on page 85*.

To locate an active service using the Identities pane

1. On the Identities pane, select the active service icon.

Active Service icon

2. Select **Locate Active Service**. The Services navigation pane opens with the active service highlighted in the Services content pane.

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To change a service using the Identities pane

1. On the Identities pane, select the arrow in the services list box that corresponds to the trunk identity that you want to change.
2. Select **Services**.
3. Select the service to apply to this identity.

> **NOTE** *For information about services and how to build and activate them, refer to* *Creating Custom Call Answering Services on page 85*.

4.

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4 Managing Messages using your Telephone

This chapter covers how to manage your mailbox messages using your telephone. It includes the following topics:

- *Overview on page 33*
- *Accessing your Mailbox using your Telephone on page 33*
- *Listening to Messages Remotely on page 33*
- *Sending Messages from your Mailbox on page 35*
- *Caller Options on page 39*

Overview

You can use a local or remote telephone to log on to the system and retrieve not only voice messages but email. With a single keypad command, the text-to-speech engine reads email messages to you over the phone. You are also informed if you have received fax messages.

You can send messages from your mailbox to another mailbox. You can also transfer callers to your mailbox. You can forward and reply to messages from your mailbox. You can also search your contacts list for information, from your mailbox.

Callers dialing into the system also have options to choose from. These options include bypassing or skipping out of a greeting, changing to another extension, or dialing the operator.

Accessing your Mailbox using your Telephone

You can access your mailbox using your telephone extension or a remote telephone. To access your mailbox using your telephone extension, you need the UC Server access number, which you can obtain from your system administrator, and your password.

To access your mailbox using your telephone extension

1. On your telephone keypad, enter the UC Server access number.
2. Enter your password followed by #.

Listening to Messages Remotely

When you call your extension from another location and access UC Server, you are performing remote mailbox management. This might include listening to messages and sending them to another phone number or managing some of your mailbox options.

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To listen to your messages from a remote location

1. Call your workplace phone number that has UC Server as the auto attendant.
2. When prompted, press the system-defined key used to access mailbox management. The default key for remote mailbox management is #.
3. When prompted, enter your extension number.
4. When prompted, enter your password followed by #. Before you hear the main menu, the mailbox summary lists the number and types of messages in your mailbox.
5. The main menu lists basic options. If you do not make a selection right away, the menu is repeated until you press a key.

Table 4–1: Main Menu

1,1	to review new messages
1,2	to review new voice messages
1,3	to review new email messages
1	to review all messages
2	to send a message
4	to change mailbox options
5	to search contacts
*	exit

Press **1**,**1** to hear new messages or press **1** to hear all messages.

You can use the following playback commands on your telephone keypad as you listen to each message:

Table 4–2: Playback commands

1	= rewind 3 seconds
1,1	= rewind to start of message
2	= pause then resume playback
3	= forward 3 seconds
3,3	= forward to end of message
5	= play message information (caller ID, date, time)
7,7	= delete message
8	= reset to normal volume
8,8	= reply/call back to messages
9	= increase volume
9,9	= save message
0	= help
#	= skip to end of message (message marked as unheard)
*	= done

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> **NOTE** *Playback commands are different depending on the type of message you are checking.*

6. At the end of each message, the **end of message menu** plays. If you press **#** to skip the message, it is marked as unheard.

Table 4–3: End of message menu

3	to forward
4	to replay
5	to play message information
7	to delete
8	to reply to messages
9	to save
#	skip message
0	help

Sending Messages from your Mailbox

You can send a voice message to another person directly from your mailbox to their mailbox, without calling their extension.

To send a voice message from your mailbox:

1. Access your mailbox using a telephone.
2. Press **2** to send a message.
3. Record the message, and then press # when you are finished recording.
4. When you finish recording, do one of the following:
   - Press **1** to keep the message.
   - Press **2** to re-record the message. Follow the prompts.
   - Press **3** to listen to the message. When you are satisfied with the message, press **1** to keep it.
   - Press ***** to cancel.

Table 4–4: Post-recording options

1	keep
2	re-record
3	listen
*****	cancel

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5. To enter recipients, do one of the following:
   - Enter the extension or phone number followed by #.
   - Press **1** to send to a name. Enter the name followed by #.
   - You are prompted to press **1** to confirm the selection or to press ***** to cancel selection
6. If you want to send the same message to more than one mailbox, press **1** to enter another recipient's phone number. To send the message, press **2**.

Transferring calls to a mailbox

To transfer a call directly to a mailbox

1. While you have a caller on the telephone, press **Transfer** on the telephone keypad.
2. Dial the UC Server telephone number.
3. When you are prompted to enter a password, followed by #.
4. When you are prompted for an extension number, enter the extension number of the mailbox where you want to transfer the caller.
5. Hang up.

Forwarding messages

You can forward any type of message from your mailbox, as either a voice or email message. If you have contact integration, you can forward an email message to a user and another email address.

> **NOTE** *The forward to email feature works only if UC Server has an email server and the contact management system configured.*

To forward a voice message from your mailbox

1. Access your mailbox using a telephone.
2. After you listen to the message that you want to forward, press **3**.
3. Record an annotation to the message, and then press # when you are finished recording.
4. When you finish recording, select one of the following *Post-recording options on page 35*:
   - Press **1** to keep the message.
   - Press **2** to re-record the message. Follow the prompts.
   - Press **3** to listen to the message. When you are satisfied with the message, press **1** to keep it.
   - Press ***** to cancel.
5. To enter recipients, do one of the following:
   - Enter the extension or phone number followed by #.
   - Press **1** to send to a name. Enter the name followed by #.
   - You are asked to press **1** to confirm the selection or to press ***** to cancel selection

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6. If you want to send the same message to more than one mailbox, press **1** to enter another recipient's phone number.
7. If you want to send the message, press **2**.
8. After the delivery confirmation, the end-of-message options play.

To forward a message by email from your mailbox

1. Access your mailbox using a telephone.
2. Listen to the message that you want to forward, and then press **3**.
3. Do one of the following:
   - Press **1** to record an annotation to the message
   - Press **2** to skip the recording
4. To record an annotation, select one of the following *Post-recording options on page 35*:
   - Press **1** to keep the message.
   - Press **2** to re-record the message. Follow the prompts.
   - Press **3** to listen to the message. When you are satisfied with the message, press **1** to keep it.
   - Press ***** to cancel.
5. To enter recipients, do one of the following:
   - Enter the extension or phone number followed by **#**.
   - Press **1** to send to a name. Enter the name followed by **#**.
   - You are asked to press **1** to confirm the selection or to press ***** to cancel selection.

> NOTE *To forward the email using the dial-by-name options, the contact that you choose must have at least one valid email address.*

6. If you want to send the same message to more than one email address, press **1** to enter another recipient's phone number. To send the message, press **2**.
7. After the delivery is confirmed, the end-of-message options play.

> NOTE *Local message store users receive the forwarded email message as a voice message that details where it is from, and plays the annotation, if there is one recorded for it.*

Replying to messages

You can reply to a voice message or an email message directly from your mailbox. UC Server uses the contact management software, for example Outlook, to reply to a message or call back the sender. You can reply to a voice message that is from an internal caller. If the message is from an external caller, you can call back the person who left the message. You can call that person back at any number that is in your contacts list. You can send a voice message in reply to an email message using a wave file attachment.

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If you press # after you record a message, you can choose from any of the end-of-record options, listed below.

Table 4–5: End-of-record options

1	deliver
2	re-record
3	listen
4	append
5	discard
*	cancel

To reply to an internal voice message

1. Access your mailbox using a telephone.
2. Listen to the voice message that you want to reply to.
3. Press **8** to reply to the message.
4. If the message is from a caller with an internal mailbox do one of the following:
   - Record your message at the tone
   - Press **1** to call back the extension

To reply to an email message

1. Access your mailbox using a telephone.
2. Listen to the email message that you want to reply to.
3. Press **8** to reply to the message.
4. Record your message after the tone.
5. When you finish recording your message press **#**.

> **NOTE** *When you reply to an email message, the reply is delivered as a wave file attachment to the sender of the email. The recipient opens the attachment to hear your voice message.*

To call back in response to a voice message

1. Access your mailbox using a telephone.
2. Listen to the voice message that you want to respond to.
3. Press **8** to call back in response to the voice message.

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4. Do one of the following:
   - If you have the sender's Calling Line ID, press **1** to call back the sender.
   - If the sender's telephone number is in your contacts list, press **2** to call back the sender at any of the numbers listed.
   - If you want to call a separate number in your contacts list, press **3** and enter the first few digits of the person's last name.

To call back in response to an email message

1. Access your mailbox using a telephone.
2. Listen to the email message.
3. Press **8** to call back in response to an email message.
4. If the sender's email address is in your contacts list, press **2** to call back the sender at any of the numbers listed.

Searching your contacts list

From your mailbox, you can transfer to a telephone number, search your contacts for a number to transfer to, or search for information—such as address, email addresses, or telephone numbers—about your personal contacts.

To search your contacts

1. Access your mailbox using a telephone.
2. From the Main Menu, press **5**.
3. If you want to transfer to a telephone number, enter the number.
4. If you want to search your contacts list, do either of the following:
   - Press **1** to search your contacts and transfer to a contact on your list
   - Press **2** to search your contacts and retrieve information about a contact on your list

> NOTE *The type of information that you can retrieve includes the address, telephone number, or email address for a contact, if already specified in the contact fields.*

Caller Options

Callers that dial into the system have several options. While callers are listening to user greetings or leaving messages, they can bypass a greeting, skip out of a greeting, skip out to another extension after they leave a message, or dial the operator. A caller that accidentally ends up in the wrong voicemail, or decides they want to call someone else instead, can skip out of a greeting. After leaving a message, a caller can go to another extension and leave a message for another user without having to hang up and redial the system.

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To bypass a greeting

Press # while listening to a greeting.

> **NOTE** *If the out-of-office greeting is enabled, the caller must listen to the initial system status message before pressing the # key. The caller cannot press any key until the greeting has played: "The user at this extension is out of the office".*

To skip out from a greeting

Press * while listening to a greeting. The caller hears the following: "If you wish to be transferred to an extension, please dial the extension number now. If you are not sure of the extension number, but know the name, press 1 now. Press * to manage you mailbox."

> **NOTE** *This feature depends on how the system is configured. The administrator can change the key access skip out option and whether it is enabled.*

To skip out to another extension after leaving a message

1. After you record a message, press # to send a message.
2. Choose an option from the *End of message menu on page 35*. The caller hears the following: "You may hang up now or if you wish to be transferred to an extension, please dial the extension number now."

> **NOTE** *This feature works correctly only if it is enabled by the system administrator.*

To dial an operator

While listening to a greeting, press the operator key. By default, the operator key is **0**.

> **NOTE** *The operator key can be configured by the system administrator. It might be a key other than **0**.*

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5 Managing Messages Using Your Computer

This chapter explains how the NetVanta UC Server works with Microsoft Outlook, Lotus Notes, and an integrated messaging client to provide a unified communications solution. The chapter covers the following topics:

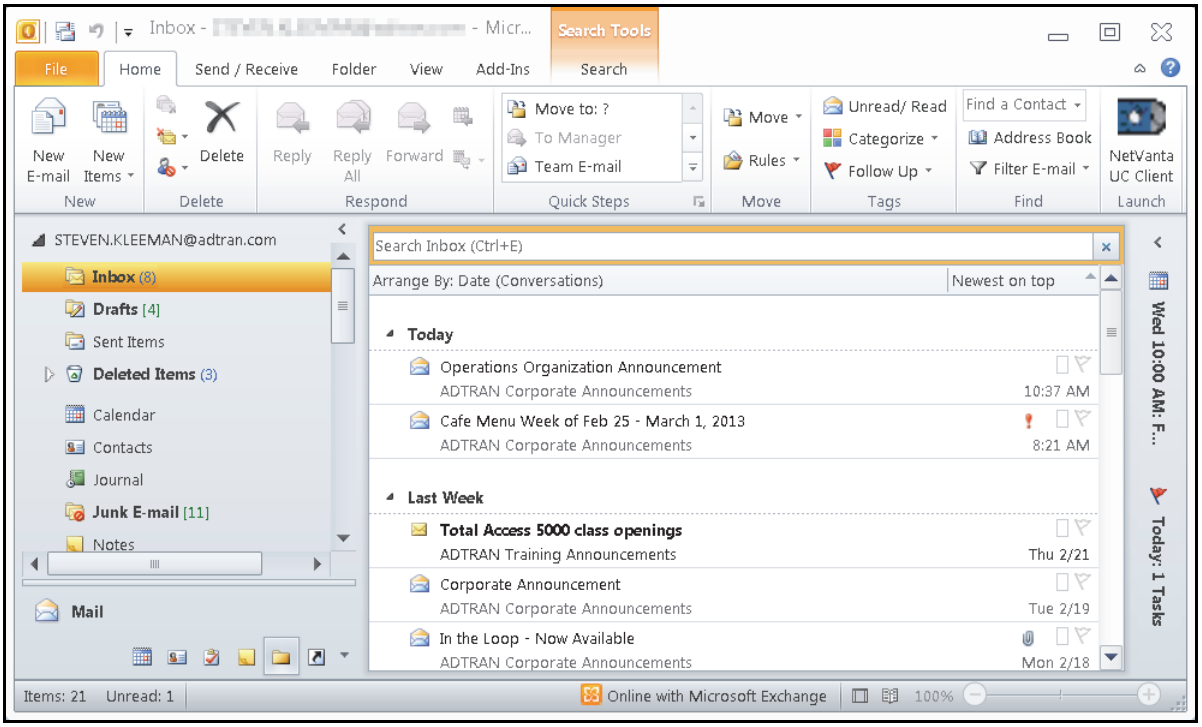
- *Overview on page 41*
- *Managing Messages in Microsoft Outlook on page 41*
- *Managing Messages in Lotus Notes on page 47*
- *Managing Messages in the Mailboxes Menu in NetVanta UC Client on page 53*

Overview

The NetVanta UC Server works with Microsoft Exchange, Lotus Notes, an integrated messaging client (using the Mailboxes menu in the NetVanta UC Server), and other IMAP-compliant email systems to provide users with a single storage and access point for voice, fax, and email messages. Users can retrieve and manage messages either over the telephone or directly from the desktop. This chapter explains how to retrieve and manage messages from your desktop.

Managing Messages in Microsoft Outlook

The NetVanta UC Server can be integrated with Microsoft Outlook so that all your messages appear in the same inbox. Below is an image of an Outlook inbox:



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You are already familiar with email messages and how to manage them from your desktop. You can manage voice and fax messages in the same way. When you double-click on a voice message icon, the message opens in a NetVanta UC Client VoiceForm. You can play a voice message over your computer using a headset, or over a telephone speaker, and you can forward the message to someone else.

When you double-click on a received fax in your Outlook Inbox, the fax opens in the NetVanta UC Client FaxForm. You can print the fax, forward it by email or to other fax devices, or save the fax as a PDF.

The NetVanta UC Client custom VoiceForm and FaxForm allow you to manage voice and fax messages as you would any other email. You can forward, move, delete, and save a message.

Managing Voice Messages in Outlook

You can listen to your voice messages from Microsoft Outlook, and you can manage your voice messages from Outlook.

Listening to Voice Messages

An icon in your voicemail inbox indicates a voice message.

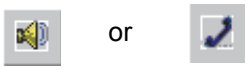
To listen to a voice message

1. In your Outlook inbox, double-click a voice message.

Voice message icon

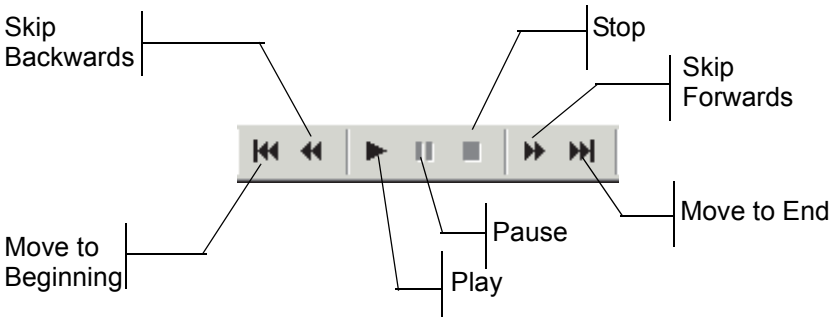
You can select the icon, or the subject line of the message.The NetVanta UC Client VoiceForm menu appears.

2. Select the icon of the speaker that you want to use.



   The icon that you select is enclosed by a dotted line.

3. Selec the play button. Use the other audio commands to manage the playback.



Managing Voice Messages

You can manage voice messages from your Outlook inbox or from a voice message window that you open. When you connect to the server to retrieve messages, the message waiting light turns off, depending on how it is configured by the system administrator.

The following instructions apply to both means of management. Unless otherwise stated, they assume that you have opened a voice message and that it is displayed in a voice message window. When you are managing voice messages from your Outlook inbox, you need to select a voice message before following the steps.

To print text or an annotation associated with a voice message

1. Select **File > Print**.
2. Change the desired print options.
3. Select **OK**.

To save the audio component of a voice message

1. Select **File > Save As Wave**.
2. In the **File name** field, enter a name for the message.
3. From the **Save In** list, choose a location for the saved file.
4. Select **Save**.

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To delete a voice message from the inbox

1. Select the voice message that you want to delete.
2. Select the **Delete** icon.

Delete icon

By default, Outlook deletes the voice message from the inbox and puts it in the **Deleted Items** folder in Outlook.

To move a voice message to a different Outlook folder

1. Select the voice message that you want to move.
2. Drag the message to the Outlook folder where you want to move the message.

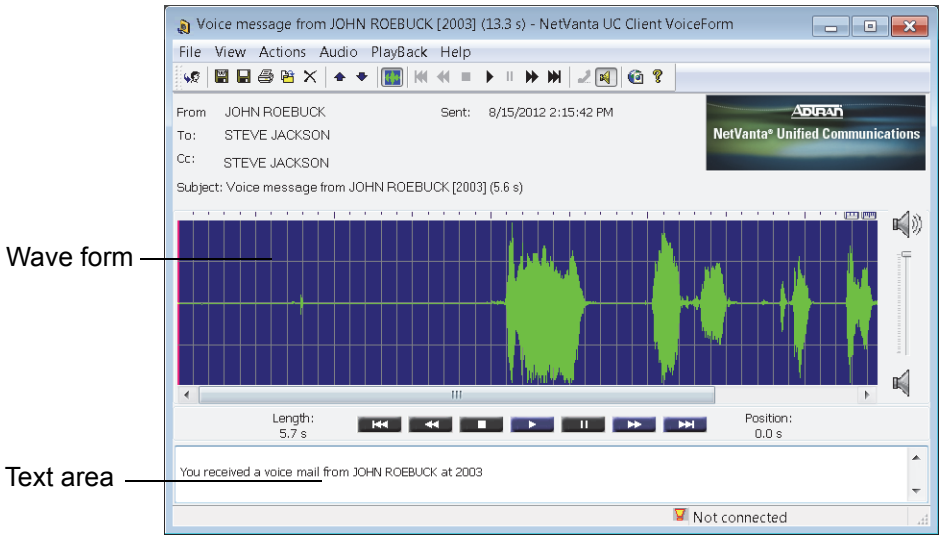
> **NOTE** *Outlook folders appear in the folder list of your inbox.*

To forward a voice message

1. Select the **Forward message** icon.

Forward message icon

The NetVanta UC Client VoiceForm menu opens.



2. In the text area, enter comments or additional information that you want to include. Internal recipients can listen to the voice message and read your comments in the text area. External recipients can read your comments in the text area and receive the audio as an attachment.
3. Select **To**.
4. Select a recipient from your Outlook contacts list. The information for the recipient must include an email address if you want the message to be forwarded successfully. If the recipient is not internal or is not included on your contacts list with an email address, then do the following: in the **Select Names** dialog box, select **To** and enter the recipient's email address in the **Forward Voicemail To** field.
5. Select **OK**.
6. Select **File > Send**.

Managing Fax Messages in Outlook

You can identify fax messages in your Microsoft Outlook Inbox by the following fax message icon.

Fax message icon

To view a fax message

From your Outlook inbox, double-click a fax message. You can select the fax message icon or the subject line of the message. The fax message opens in the NetVanta UC Client FaxForm.

> **NOTE** *If you do not see the fax icon, and if the fax message opens in NetVanta UC Client Fax Viewer instead of the NetVanta UC Client FaxForm, then you may not have the NetVanta UC Client FaxForm installed on your NetVanta UC Server. See your system administrator for more information.*

To print a fax message

1. Select the fax message that you want to print.
2. Select **File > Print**.

To save a fax message

1. Select the fax message that you want to save.
2. Select **File > Save as TIF file**.
3. In the **File name** field, enter a name for the message.
4. From the **Save in** list, choose a location for the saved file.
5. Select **Save**.

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To save a fax message as a PDF

1. Double-click the fax message that you want to save. The NetVanta UC ClientFaxForm opens
2. Select **File > Save as PDF file**, or select the **Save as PDF File** icon on the toolbar.

Save as PDF File icon

3. In the **File name** field, enter a name for the message.
4. From the **Save in** list, choose a location for the saved file.
5. Select **Save**.

To delete a fax message from your inbox

1. Select the fax message that you want to delete.
2. Select the **Delete** icon.

Delete icon

By default, Outlook deletes the voice message from the inbox and puts it in the **Deleted Items** folder in Outlook.

To move a fax message to a folder

1. Select the fax message that you want to move.
2. Drag the message to the Outlook folder where you want to move it. Outlook folders appear in the folder list of your inbox.

To forward a fax message by fax

1. Select the fax message that you want to forward.
2. Select the **Forward message** icon.

Forward message
by fax icon

3. In the text area, enter comments or additional information that you want to include.
4. Select **To**.
5. Select a recipient from your Outlook contacts list. The information for the recipient must include an email address if you want the message to be forwarded successfully. If the recipient is not internal or is not included on your contacts list with an email address, then enter the recipient's email address in the **To** field.

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6. Select **OK**.
7. Select **File > Send**.

To forward a fax message by email

1. Double-click the fax that you want to forward.

   The NetVanta UC ClientFaxForm opens.
2. If you want to save a copy of the fax as a PDF before forwarding the fax then select **File > Save as PDF file**.
   - In the File name box, enter a name for the message.
   - In the Save in list, choose a location where you want to save the file.
   - Select **Save**.
3. Select the Forward message by email icon.

Forward message by email icon

4. In the text area at the bottom of the window, enter any comments or additional information that you want to include with the fax.
5. Select **To**.
6. Select a recipient from your Outlook contacts list. The information for the recipient must include an email address if you want the message to be forwarded successfully. If the recipient is not internal or is not included on your contacts list with an email address, then enter the recipient's email address in the **To** field.
7. Select **File > Send**.

Managing Messages in Lotus Notes

The NetVanta UC Server integrates with Lotus Notes through an IMAP-compliant email server. With administrator and user mailboxes and passwords, the NetVanta UC Server puts voice and fax messages into the appropriate mailbox.

Lotus Notes users can view voice messages in their inbox and can play voice messages through either a computer sound card or over the telephone. Lotus Notes users can also view fax messages without opening additional programs.

Launching Lotus Notes

When you launch the Lotus Notes client, it attempts to connect to the NetVanta UC Server. At the first attempt, you are prompted for the location of the NetVanta UC Server.

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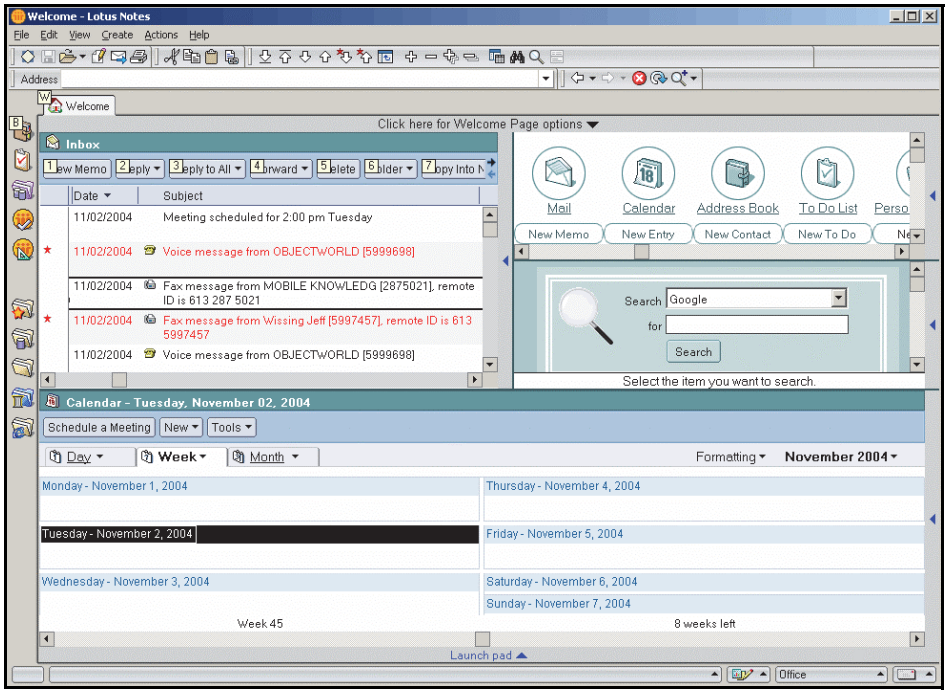
To launch Lotus Notes with the NetVanta UC Server the first time

1. Launch Lotus Notes.
2. In the Server Name box, select the machine name or IP address of the NetVanta UC Server.
3. Enable the **Save as default** check box to automatically select the server the next time you launch Lotus Notes.
4. Select **OK**.
5. enter your user name in the **User name** box. In most cases, the user name is your mailbox number.
6. enter your password in the **Password** box. In most cases, the password is your telephone mailbox password.
7. Enable the **Save as default** check box to automatically log in to the NetVanta UC Server the next time you launch Lotus Notes. Incoming voice and fax messages appear in the Lotus Notes inbox. Here is what a Lotus Notes inbox looks like:



Lotus Notes automatically associates custom icons with voice and fax messages.

Voice icon

Fax icon

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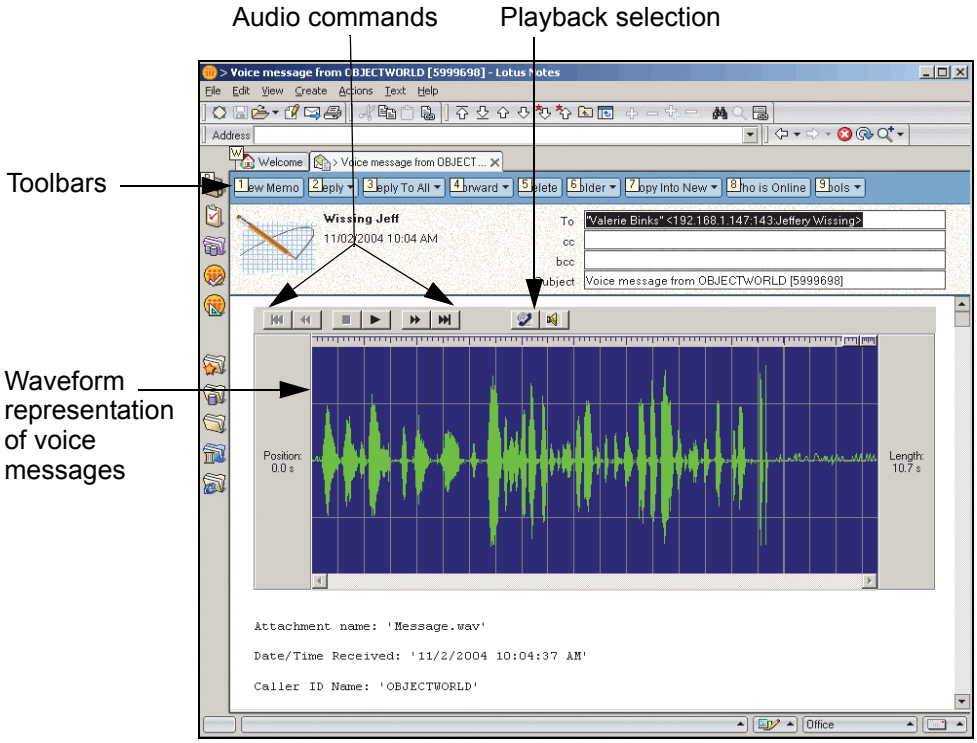
Managing Voice Messages in Lotus Notes

Listening to Voice Messages

Open the voice message to open the following form and client plug-in.



The form allows you to select the playback enter: associated telephone handset, or speaker phone. The waveform representation allows you to highlight and select sections of audio to play back.

To listen to a voice message

1. In your Lotus Notes inbox, double-click a voice message.
2. Select the icon of the speaker that you want to use.
3. Select **play**.

Managing Voice Messages

When you manage voice messages from the Lotus Notes inbox, you can select a voice message in the inbox, or open the message. You can access the same options—replying, forwarding, and deleting—from either the inbox or the open message dialog.

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To reply to a voice message

1. Select **Reply**. If you want to reply to everyone who is on the **To** list, select **Reply to All**.
2. Select one of the following:
   - Reply
   - Reply with History
   - Reply without Attachment(s)
   - Reply with Internet-Style History
3. enter a message in the message area.
4. Select **Send**. If you want to save a copy of the reply, select **Send and File...** and select a location to save to.

To forward a voice message

1. Select **Forward**.
2. Select one of the following:
   - Forward
   - Forward without Attachment(s)
   - Forward with Internet-Style History
3. enter the email address to which you want to forward the memo.
4. If you want to add a message, enter it in the message area.
5. Select **Send**. If you want to save a copy of the forward email, select **Send and File...** and select a location to which to save the copy.

To delete a voice message from the inbox

1. Select the message that you want to delete.
2. Select **Delete**.

Managing Fax Messages in Lotus Notes

Opening an incoming fax message opens the following form and client plug-in.

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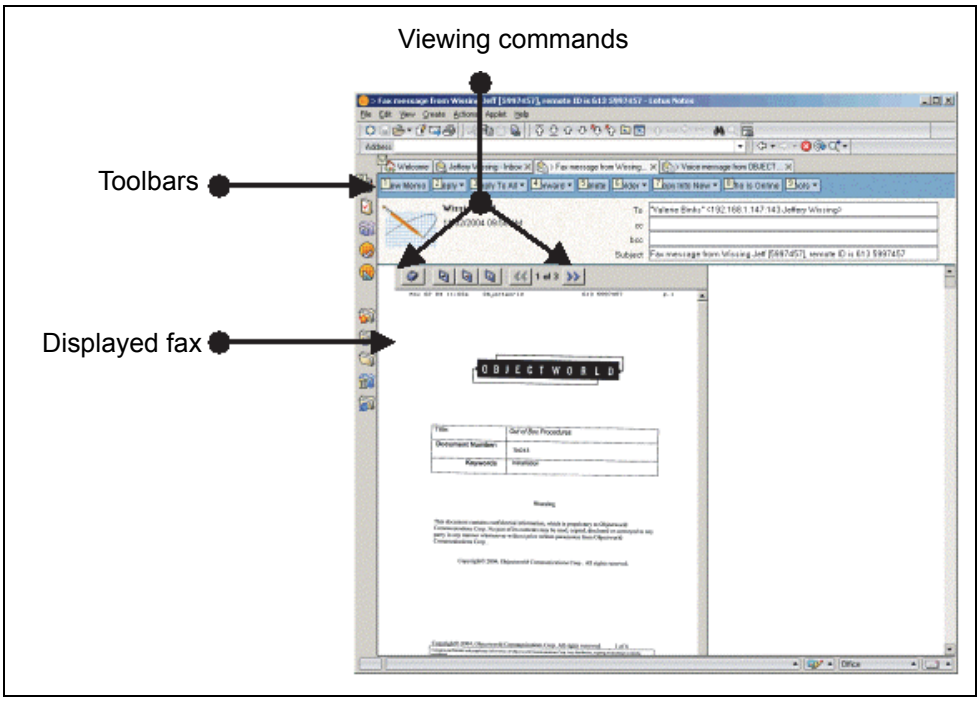

Sent Items—Fax Transmission Reports

Faxes that you send from a client computer are automatically put into the **Sent Items** folder.

> **NOTE** *The "Sent Items" folder used by Lotus Notes IMAP is not the same as the Lotus Notes "Sent" folder. To review fax transmission reports, you might have to create a folder called "Sent Items."*

For information about the fax transmission report, refer to *Managing outgoing faxes on page 63*.

Managing Fax Messages

Using the fax form, you can view and print messages in Lotus Notes. You can also move fax messages to other folders.

To view a fax message

Double-click a fax message. Scroll in the Fax Viewer to view the fax.

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To print a fax message

1. Open the fax message that you want to print.
2. In the **Fax Viewer**, select the **Print** icon to open the print dialog box.

Print icon

   Make sure that the correct printer is selected in the **Name** list.
3. Select **OK**.

To save a fax message to a folder as a PDF file

1. Double-click a fax message
2. Select on the **Save as PDF...** icon in the fax control

Save as PDF

3. In the file name box, enter a name for the message.
4. In the **Save in** list, choose a location where you want to save the file.
5. Select **Save**.

Synchronizing Your Password with Lotus Notes

If you do not receive voice or fax messages, or are unable to access your mailbox, you might have to synchronize your password with Lotus Notes.

Lotus Notes uses two different internal passwords: Lotus Notes and Internet password. The Lotus Notes password is used exclusively with the Lotus Notes client. The Internet password is for all other login authentications using Internet protocols, including Web access, POP, and IMAP4.

Changing your Lotus Notes password does not automatically change the Internet password. When creating a Lotus Notes user, there is an option to synchronize the Internet password with Lotus Notes. The synchronization occurs only when the user is created, otherwise the passwords must be individually managed.

To change your IMAP4 password in the NetVanta UC Server

1. Launch the NetVanta UC Server.
2. Log in with the Lotus Notes user name and telephone password.
3. Select **Tools > Options**.
4. Select the **External Systems** tab.

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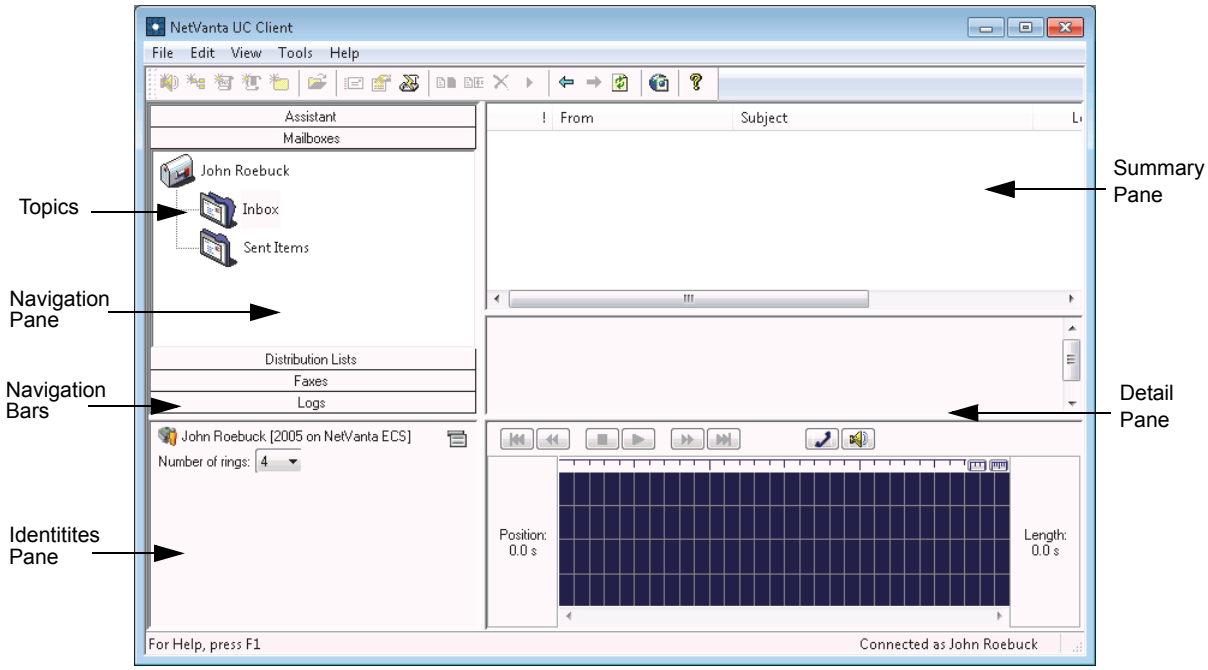
5. Make sure that the information in the IMAP mailbox management section is correct.
6. Select the **password** button.
7. Enter the new Lotus Notes Internet password.

Managing Messages in the Mailboxes Menu in NetVanta UC Client

The Mailboxes menu provides an integrated messaging client and displays all your voice and fax messages in one inbox. You can play messages, forward messages to an email address, create attachments, and archive messages.



The navigation pane displays the folders in which messages are stored. Open a folder to view the contents in the content pane. An icon indicates a voice or fax message. The information pane displays details about the history of the message that you open. In the preview pane, you can view the waveform of a voice message or contents of a fax message.

Managing Messages

Using the content pane of the **Mailboxes** menu, you can open, delete, or mark a message.

To open a fax message in the Fax Viewer

1. Right-click the fax message that you want to open.
2. Select **Open**.

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To delete a fax or voice message

1. Right-click the fax or voice message that you want to delete.
2. Select **Delete**.
3. Select **Yes** to confirm the deletion.

To mark a fax or voice message as heard or unread

1. Right-click the fax message that you want to mark.
2. Select **Mark as Heard** or **Mark as Unread**.

Playing Voice Messages

You can play voice messages using the telephone or computer speakers.

To play a voice message

1. In the **Content** pane, select the message that you want to play.
2. If the waveform of the message does not automatically appear in the preview pane, select the **Download** button.
3. Select the icon of the device that you want to use to play the message.
4. Select the **Play** button to play the voice message.

Using Attachments

You can drag a voice or fax message to an email message in your email client. The message that you drag becomes an attachment. You can create attachments for new messages, reply emails, or forward emails.

The **Save Attachment** option enables you to save a voice or fax message attachment to your hard drive, which you can then forward to other users using your regular email client.

To create an email attachment

1. Open your email client.
2. Do one of the following:
   - Create a new email message.
   - Create a reply to an existing email message.
   - Create a forward email for an existing email message.
3. Drag the voice or fax message that you want from the content pane of the **Mailboxes** menu to the email message. The message automatically becomes an email attachment.

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To save an email or fax locally as an attachment

1. Select the **Mailboxes** navigation bar.
2. Select the voice or fax message that you want to save as an attachment.
3. Right-click the selected message, and select **Save Attachment**.

   Alternatively, select **File > Save Attachment**.
4. Browse to the location where you want to save the file locally, and select **Save**.

To save a fax message to a folder as a PDF file

1. Double-click a fax message
2. Select on the **Save as PDF** icon in the fax control

Save as PDF

3. In the file name box, enter a name for the message.
4. In the **Save in** list, choose a location where you want to save the file.
5. Select **Save**.

Archiving Messages

You can save voice and fax messages in an archive directory on the hard drive.

To archive a message

1. Create a directory where you want to archive voice and fax messages.
2. Drag the voice or fax message that you want from the content pane of the Mailboxes menu to the directory that you created. The message is automatically copied to the directory.

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6. Faxing

This chapter provides information about how to send and manage fax documents. A fax printer driver is included, which allows you to send a fax directly from whichever application you are using. There is also a Fax Wizard to help you with fax transmissions. As with other features, you can select recipients quickly from those listed in your Outlook Contacts or enter the recipient fax number yourself. You can also set an account code to apply to the fax numbers that you choose.

This chapter also includes an overview of how faxes are received, and how to set up automatic notifications when you receive a fax.

This chapter covers the following topics:

- *Overview on page 57*
- *Sending Faxes on page 58*
- *Receiving Faxes on page 81*

Overview

Use the Faxes menu to send and manage fax documents and their cover pages from the NetVanta UC Client. There are several methods of sending faxes including:

- Sending a fax from other applications using the ADTRAN Fax print driver
- Sending a cover page only from the NetVanta UC Client using Quick Fax
- Sending a prepared fax from the NetVanta UC Client
- Automatically sending faxes requested by callers using the Fax-on-demand element in a service.
- Sending faxes to a specific fax number using the Send fax element

The Faxes menu is not used for receiving faxes. Incoming faxes are received and viewed through a user's mailbox, for example, through Microsoft Outlook, Microsoft Exchange Server, Lotus Notes, or through an Integrated messaging client (a Mailboxes navigation bar on the user's NetVanta UC Client) or IMAP4.

The NetVanta UC Server can always receive a fax, provided adequate fax channels are available, whenever a fax tone is detected.

Other methods of receiving faxes include:

- A dedicated fax number (fax identity). That is, a Personal Fax DID (direct-inward-dial) number.
- A shared voice and fax number (using the same identity)

You can also use the receive fax element in a service to customize receive fax behavior.

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Sending Faxes

You can send a fax document from another application or using the Faxes menu of the NetVanta UC Client. When a fax document is ready to send, the fax is added to the fax queue. Before you send a fax, you can change the user that you want to send the fax from. This is useful if a user manages several mailboxes.This is useful if a user manages several mailboxes, or as part of a Fax-on-demand element.

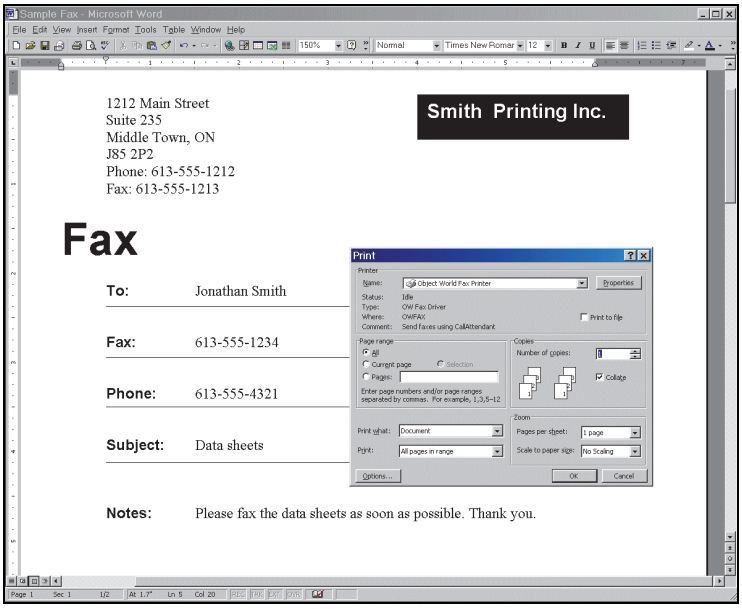
> NOTE
> *You can send a fax cover page only using Quick Fax. For more information, refer to* *To send a cover page only using Quick Fax on page 80*.

Sending faxes from other applications using the ADTRAN Fax Printer

You can send faxes from other applications using the ADTRAN Fax Printer. You can also change user profiles to send a fax from another user, or to save a fax to another user's profile.

To send a fax document from another application

1. Open the document that you want to send as a fax.
2. Select **File > Print** to open the Print menu box.



3. From the printer name drop-down menu select the ADTRAN Fax Printer, and select **OK**.
4. If you are prompted, enter the user name and password for the user from which you want to send the fax, and select **OK**.

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5. In the NetVanta UC Client fax printer menu box, select one of the following:
   - **Send now**—sends the fax now, after having made your fax selections
   - **Save to file**—allows you to save the file as a fax to send later

> NOTE *To change the user from which you want to send the fax, refer to* *To change users when sending or saving a fax on page 60*.

6. If you select **Save to file**, refer to *To save a document as a fax on page 59*.
7. If you select **Send now**, select **OK** to open the Fax Recipients menu box.
8. Select **Addresses** to select recipients from your Outlook Contacts list. Otherwise, enter the recipient names and fax numbers.

9. Select **Add to List** for each recipient that you specify.

> NOTE *To delete a recipient from the Recipient list, select the recipient and then select* ***Remove****.*

10. Select **Next** and the Fax Scheduling menu box opens.
11. Specify when you want to send the fax, select **Next**, and the Select Cover Page menu box opens.
12. To include a fax cover page select **Yes**, and double-click a folder to view its contents.
13. Select the cover page that you want, select **Next** and the Cover Page Details menu box opens. Use the arrow if you want to return to the previous folder.

Go back arrow

14. Enter the subject and notes that you want to add to the cover page, and then select **Next**.
15. At the Finished menu select **Finish**. The fax is sent according to the instructions.

Saving a document as a fax to send later

To save a document as a fax

1. Open the document that you want to save as a fax.
2. Select **File > Print** to open the Print menu box.
3. In the **Name** drop-down menu, select the **ADTRAN Fax Printer**, and select **OK**.

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4. If you are prompted, then enter the user name and password for the user from which you want to send the fax, and select **OK**.
5. If the **Server** menu box opens then select **UC Server** from the drop-down menu, enable the **Save server as default** check box, and select **OK** to open the NetVanta UC Client *Fax Printer* menu box.
6. Enable the **Save to file** button.
7. Select the **Browse** button to open the Select Fax Name menu box.

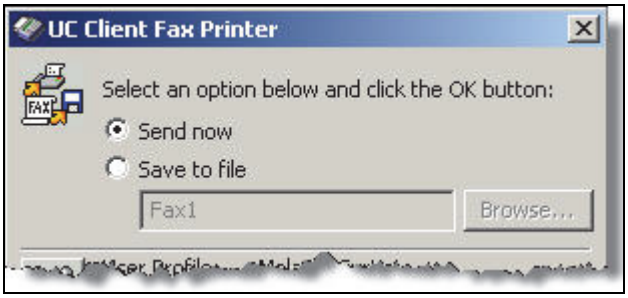
Browse Button

8. In the field, enter a name for the file and then select **Select**.
9. On the **Fax Printer** menu box, select **OK**. The fax document is saved in your fax documents folder.

Changing users when sending a fax or saving a fax to send later

When you send a fax from another application, or when you save a document as a fax to send later, you can change the user that you want to send or save the fax from. This is useful if a user has several mailboxes, or as part of the Fax-on-demand element.

If you are faxing from another application, or saving a document as a fax, then from the *Print* menu once you have selected the **ADTRAN Fax Printer** and selected **Print**, then you are presented with the NetVanta UC Client *Fax Printer* menu.



To change users when sending or saving a fax

1. From the NetVanta UC Client Fax Printer menu box, select the **Change user** button.

Change user button

2. Enter the user name and password for the user from which you want to send the fax. The user's information appears in the **Current user information** section of the Fax Printer menu box.
3. Select **OK**.

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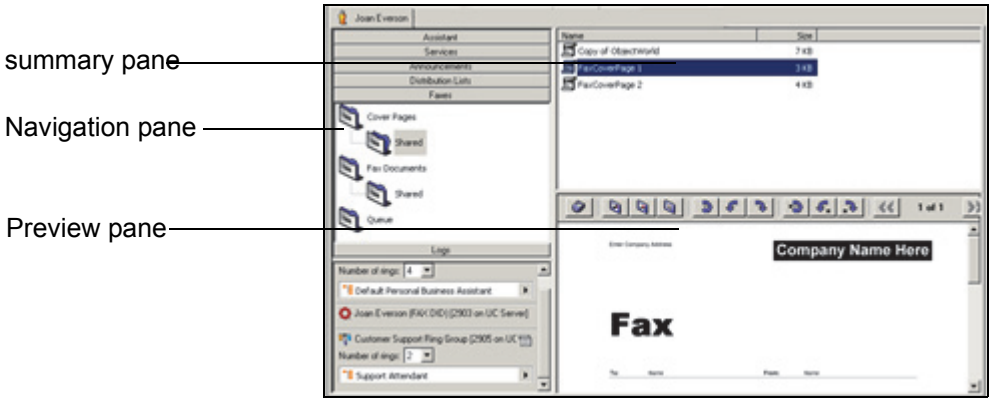
Sending faxes using the Faxes menu in the NetVanta UC Client

From the NetVanta UC Client, to get the Faxes menu select the Faxes navigation bar.

For information about sharing faxes, refer to *Importing and Exporting on page 173*.



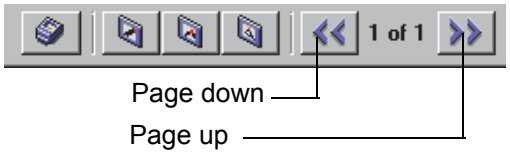
The **Faxes menu** displays a Navigation pane, summary pane, and detail pane.

The Navigation pane displays the fax folders. You can use these to store fax documents and cover pages that are saved to disk. The Queue folder contains the list of fax transmissions that you have scheduled. Each entry includes the recipient's name and fax number, the number of pages to be transmitted, the time and date of transmission, and the cover page that you have associated with it.

The summary pane displays the contents of a folder when you select it.

The **detail pane** provides a partial view of a fax document that you select. As you scroll through the list of available fax documents, you can view them in the detail pane.

Use the **Page up** and **Page down** commands on the Preview toolbar to view multiple pages of a fax document.



Use the Rotate commands on the Preview toolbar to change the orientation of a fax in the detail pane. You

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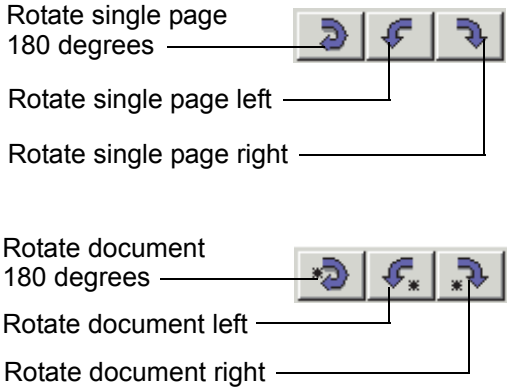
can rotate only one page of a fax document, or the entire document.



To view faxes in more detail, you can use the Fax Viewer. For more information about the Fax Viewer, refer to *Managing outgoing faxes on page 63*.

> **NOTE** *The Faxes menu is not used to receive faxes. If you are an Exchange user, any faxes that you receive can be viewed in your Outlook Inbox. Local message store users can view faxes through the integrated client.*

To send a fax using the Faxes menu

1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the Fax Documents folder containing the document that you want to send. The folder's contents are listed in the summary pane.

Faxes Folder

3. Select the fax document that you want to send.
4. Select **File > Print** to open the Print menu box.
5. Follow steps 3 to 18 in *Sending faxes from other applications using the ADTRAN Fax Printer on page 58*.

To specify fax numbers and account code

1. Select the telephone icon in the Fax Recipients menu box.

Telephone icon

2. Enter the area code and telephone number for the fax that you want to specify.

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3. Choose a country code from the Country code drop-down menu.
4. Enable the **Use Account Code** check box. The administrator must have enabled this option in order for it to be available.
5. Type an account code in the field, and select **OK**.

Sending faxes to a specific fax number using the Send Fax element

The Send Fax element allows you to set up a list of fax documents to be sent to a specific fax number. You can specify the fax number, choose a cover page, and then select the list of documents that you want to send. For more information, refer to *Send Fax element on page 113*.

Automatically sending faxes requested by callers using a Fax-on-demand element

You can use a Fax-on-demand element to set up a fax-on-demand service. The Fax-on-demand element allows you to select a fax document and an accompanying cover page, and then have the fax transmitted to callers who select the service from a menu. When callers select Fax-on-demand, they are prompted to enter a fax number. The fax that you selected is then transmitted. For information about using the Fax-on-demand element, refer to *Fax-on-demand element on page 118*.

Managing outgoing faxes

You can preview or print fax documents that you have prepared for transmission. Likewise, you can prepare a document, save it, and make it available for transmission at a later time. Prepared fax documents can be stored in folders for efficient organization and easy retrieval. You can also copy or rename a fax.

A fax transmission report is created and sent with each fax that is sent successfully. A fax transmission report consists of a graphic page image that contains both the text-based transmission report, and a reduced-size image of the first page of the fax. The report includes information such as the date and time the fax was sent, sender's name, fax number, and total number of attempts. Depending on how your system has been configured, you may be able to print the fax transmission report, along with the first page of the fax, by using the **File** > **Print First Page** command in the Fax Viewer.

Fax transmission reports are sent to your Sent Items folder when a fax is sent successfully. If the fax is unsuccessful, an email stating the failure appears in your mailbox.

To preview a fax document

1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the fax documents folder containing the document that you want to preview. The folder's contents are listed in the summary pane.

Faxes Folder

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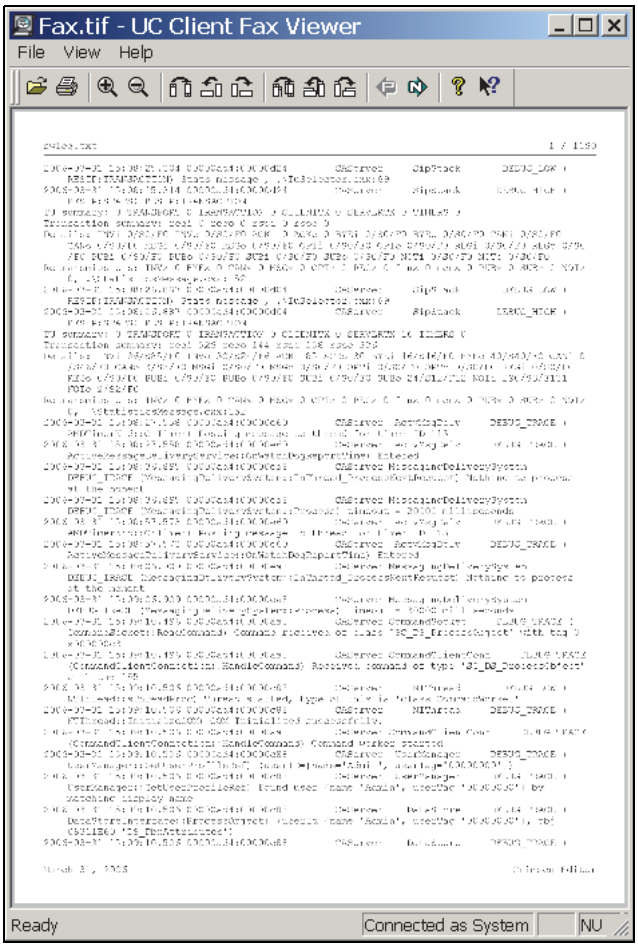
3. Right-click the fax document that you want to preview, and select **Open** to display the fax in the Fax Viewer.

.



Use the zoom control icons to zoom in or out of the fax.

Use the rotate control icons to rotate only one page of a document, or the entire document. Rotate to the left, right, or 180 degrees.

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Use the page control icons to scroll through a multiple-page document.

> *To print the fax document from the Fax Viewer, select the printer icon on the Fax Viewer toolbar.*

To print a fax document

1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the fax documents folder containing the document that you want to print. The folder's contents are listed in the summary pane.

Faxes Folder

3. Right-click the fax document that you want to print, and select **Open** to display the fax in the Fax Viewer.
4. Select **File > Print Setup** to open the Print Setup menu box.
5. Select a printer, and select **OK**.

To print the first page only of a fax document

1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the fax documents folder containing the document that you want to print. The folder's contents are listed in the summary pane.
3. Right-click the fax document that you want to print, and select **Open** to display the fax in the Fax Viewer.
4. Select **File > Print First Page** to print the first page only of the fax. Depending on how your system is configured, the fax transmission report may also be printed.

To rename a fax document

1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the fax documents folder containing the document that you want to rename. The folder's contents are listed in the summary pane.
3. Right-click the fax document that you want to rename, and select **Rename**.
4. Enter a new name for the fax document.

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To copy a fax document

1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the fax documents folder containing the document that you want to copy. The folder's contents are listed in the summary pane.
3. Right-click the fax document that you want to copy, and select **Duplicate**. A copy of the fax document appears in the summary pane, with the words "Copy of" before its name. You can rename the copied document.

To delete a fax document

1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the fax documents folder containing the document that you want to delete. The folder's contents are listed in the summary pane.

Faxes Folder

3. Right-click the fax document that you want to delete, and select **Delete**.
4. Select **Yes** to confirm the deletion.

When you create a fax document for transmission at an undetermined time, you can save it to a fax documents folder. That makes it easy to find the fax when you open the Faxes menu and schedule its transmission.

To create a folder for fax documents

1. Right-click anywhere in the summary pane.
2. Select **New > Folder**. A new folder is added is added to the list in the summary pane.
3. Enter a name for the folder.

To put a fax document in a folder

Select the fax document that you want to store in a folder and drag it to the folder where you want to store it.

> NOTE *Select a folder to view its contents.*

> NOTE *On the toolbar, use the **Go back** arrow to return to the list previously displayed in the summary pane.*

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Viewing the fax queue and status

Select the Queue icon in the navigation pane of the Faxes menu to view all the faxes that you have scheduled for transmission. You can view the list of faxes that you have prepared, delete or cancel transmission, suspend transmission indefinitely, reschedule transmission, and forward faxes. You can also change the transmission by adding or removing recipients.

When a fax has been successfully transmitted, it is removed from the fax queue. You receive an email message signaling successful transmission.

The system administrator has set the maximum number of transmission attempts. If a fax is not successfully transmitted after the maximum number of attempts, you receive an email message to inform you about the failure. When you send a fax using the ADTRAN fax printer driver, a fax transmission report appears in your inbox. In the case of visual clients such as Microsoft Exchange, Lotus Notes, IMAP4, or Integrated Messaging client, a successful fax transmission report appears in your Sent Items folder. If the fax is not sent successfully, a failed fax transmission report appears in your inbox.

The fax transmission includes a history of the attempts and outcome of the fax. A fax transmission report is also available in the call logs.

To view the fax queue

1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the **Queue** folder icon. The folder's contents are listed in the summary pane.

For each fax in the list, you can see the recipient's name and fax number, the scheduled transmission time and date, and the number of pages including the cover page.

To view an individual fax listed in the fax queue

1. Select the **Queue** folder. Faxes scheduled for transmission are listed in the summary pane.
2. Right-click the fax that you want to view, and select **Open**.

To change recipients or fax numbers of a fax listed in the fax queue

1. Select the **Queue** folder. Faxes scheduled for transmission are listed in the summary pane. You can change a scheduled fax only if it is in waiting status.
2. Right-click the fax that you want to change, and select **Modify**. The Recipients menu box opens.
3. Make the changes that you want, and then select **Next**.
4. To remove a recipient from the list, select the recipient in the list and then select **Remove**.
5. To change a recipient's fax number, select the recipient and then make the change.
6. Select **Next** until the Finished menu appears.
7. Select **Finished**.

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To reschedule transmission of a fax listed in the fax queue

1. Select the **Queue** folder. Faxes scheduled for transmission are listed in the summary pane. You can reschedule a fax only if it is in waiting status.
2. Right-click the fax whose transmission you want to reschedule, and select **Reschedule** to open the Scheduling menu box.
3. Change the scheduling information that you want and then select **Next**.
4. Select **Next** until the Finished menu appears.
5. Select **Finished**.

To forward a fax listed in the fax queue

1. Select the **Queue** folder.

   Faxes scheduled for transmission are listed in the summary pane. You can reschedule a fax only if it is in waiting status.

2. Right-click the fax that you want to forward, and select **Forward** to open the Recipients menu box.
3. Select **Addresses** to select a recipient from your Outlook contacts list. Otherwise, enter the name and fax number of the recipient to whom you want to forward the fax.

> NOTE *When you forward a fax document, it appears as a new entry in the fax queue.*

4. Select **Add to list**.
5. Select **Next** until the Finished menu appears.
6. Select **Finished**.

To suspend transmission of a fax listed in the fax queue

1. Select the **Queue** folder. Faxes scheduled for transmission are listed in the summary pane. You can suspend a fax only if it is in waiting status.
2. Right-click the fax whose transmission you want to suspend indefinitely, and select **Suspend**. The fax transmission is suspended indefinitely. View this information in the status field.

To resume transmission of a fax that had been suspended

1. Select the **Queue** folder. Faxes scheduled for transmission are listed in the summary pane.
2. Right-click the fax whose transmission you want to resume, and select **Resume**. The fax transmission is resumed. View this information in the status field.

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To delete a fax listed in the fax queue

1. Select the **Queue** folder. Faxes scheduled for transmission are listed in the summary pane.

2. Right-click the fax that you want to delete, and select **Delete**.
3. **Select Yes** to confirm the deletion.

Using fax cover pages

This section provides information about how to create and manage fax cover pages. A cover page is sent as the first page of your document and usually includes your name, your company name and fax number, as well as that of the recipient, and some information relating to the subject of the fax.

There is a folder for fax cover pages in the navigation pane of the Faxes menu. When you open the Cover Pages folder, your fax cover pages are listed in the summary pane. From there you can create new cover pages and manage those that already exist. For information about sharing fax cover pages, refer to *Importing and Exporting on page 173*.

You can also send only a fax cover page using Quick Fax.

To create a new fax cover page

1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the **Cover Pages** icon.
3. Right-click anywhere in the summary pane.
4. Select **New > Fax Cover Page**. A new untitled cover page appears in the summary pane.
5. Enter a name for the cover page. You can use the Fax Cover Page Editor to design the appearance and content of the cover page that you created.
6. Select **File > Save** after you finish the design.

To use an existing fax cover page

1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the **Cover Pages** icon.
3. Right-click the cover page that you want to use. You can use one of the cover pages that is included, which are called FaxCoverPage 1 or FaxCoverPage 2.
4. Select **Duplicate** to create a copy of the cover page.
5. Right-click the copy of the cover page.
6. Select **Rename**.
7. Enter a new name for the fax cover page.

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8. Double-click the new fax cover page to open the Fax Cover Page Editor and make the changes that you want.

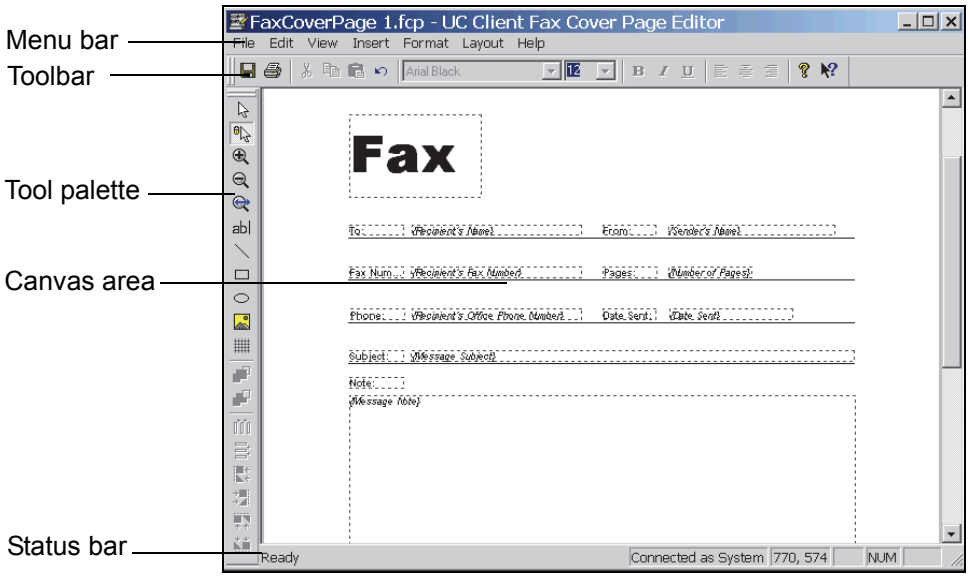
> **NOTE** *If you do not make a copy of the cover page before you make the changes, the application permanently replaces the original cover page template with your changed copy.*

Use the Fax Cover Page Editor to customize the cover pages that you create and to change those that already exist. You can design and manipulate images to give your cover pages a distinctive look, according to your needs and preferences. Your cover page is like a template: you can use it, store it, change it, and reuse it as often as you want. You can access the Fax Cover Page Editor by creating a new fax cover page or by editing an existing fax cover page.

To access the Fax Cover Page Editor

1. From the NetVanta UC Client select the **Faxes** navigation bar to open the Faxes menu .
2. To open the Fax Cover Page Editor, right-click anywhere in the summary pane, select **New** in the shortcut menu and select **Fax Cover Page**. Alternatively, to open an existing fax cover page, select a fax cover page, right-click, and select Open.
3. In the summary pane, double-click the icon of the new cover page.

The Fax Cover Page Editor consists of a standard Menu bar and Toolbar, a Tool palette, Canvas area, and



Status bar. You design your cover page on the canvas using the tools from the tool palette together with the toolbar and menu commands.

The **Menu bar** contains the File, Edit, View, Insert, Format, Layout, and Help menus.

The **Toolbar** contains shortcuts to the most frequently used menu items. Hold the pointer over a button to show the tooltips.

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The **Tool palette** contains tools for drawing, editing, and organizing your cover pages.

The **Canvas** is the design area. This is where you customize your cover page.

The **Status bar** shows the pointer's status. For example, if you hold the pointer over a toolbar button, a description of the button's function is displayed on the status bar. The coordinates at the bottom right of the status bar provide precise information about the pointer's position.

Inserting and changing labels and message information

You can include information related to the recipient, sender, and message with your cover page. This information can include the recipient's name and fax number, your name and telephone number, a subject line and short note related to the fax, along with the transmission time and date, for example. A complete list of information options is provided below.

Note that you cannot insert labels with recipient information. This is because recipients are callers who use the Fax-on-demand services that you set up. Such callers are unknown to you. Callers are prompted to enter their fax number when their call encounters the Fax-on-demand element. The fax number is captured and automatically entered on the cover page. The recipient's name may also be captured. This is the only recipient information that appears. The same is true for transmissions initiated by the Send Fax element: the recipient's fax number and name will appear on the fax cover page.

When you create a cover page, you select the type of information you want to include from the list of information options. You do not enter specific sender or message content manually when designing your cover page, because content will vary depending on each Fax-on-demand service that you set up. Instead, you insert labels for the information using the Fax Cover Page Editor. A field is created on the canvas for each of the labels you insert.

To: [Label]

{Recipient's Name} [Field]

When a fax is transmitted, the NetVanta UC Server captures the fax number and associated name then inserts the information as content in the field following the appropriate label on the cover page.

When designing the cover page, you can edit a label's font, style and content. For example, you can change the "fax" label so that it appears as "facsimile number." However, you cannot change the actual content that is associated with the field. This is because the content information is captured when a caller initiates a fax request using a service element.

The recipient information labels that you can insert include:

- Name
- Fax number
- Company
- Street Address
- City

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- State/Province
- Zip/Postal Code
- Country
- Title
- Department
- Office location
- Home telephone number
- Office telephone number

The sender information labels that you can insert include:

- Name
- Fax number
- Company
- Address
- Title
- Department
- Office location
- Home telephone number
- Office telephone number

The message information labels that you can insert include:

- Note
- Subject
- Date sent
- Number of pages
- Number of attachments

To insert an information label

1. From the **Insert** menu, choose one of the following label types:
   - **Recipient**
   - **Sender**
   - **Message**

   In this example, the choice is **Recipient**.

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2. From the submenu, select the label that you want. The label is added to the cover page canvas. It appears in a dotted rectangle. A field is inserted next to the label. The word **recipient's** identifies the field that appears in a second dotted rectangle.

> NOTE
> *The label name appears in bold, while the word **recipient's** is italicized and has a bracket in front of it. The label name is included as content on the cover page, but the word **recipient's** is not. The application inserts the recipient name associated with a fax number when a caller initiates a fax request.*

To reposition a label on the canvas

1. Select anywhere inside the label's dotted rectangle and then drag it to the desired position.
2. Do the same with the dotted rectangle of the associated field.

To change the font and style of a label or field

1. Select the label or field that you want to change.
2. Do any of the following:

- Select a font from the font drop-down menu.

- Select a point size from the size drop-down menu.

- Select a style by selecting a style button.

You can use the familiar, standard font and text style commands from the toolbar to change the font and style of the cover page, as described above. Alternatively, you can use the menu commands (**Format > Font**) which also allow you to change the script and preview the font that you choose.

To change label content

1. Select the label content that you want to change.
2. Enter the changes to the label content.

> NOTE
> *You can change label content, but you cannot change associated field content from within the Fax Cover Page Editor. To change field content related to a specific fax transmission, you need to do so from the fax queue. Select the fax that you want to change and right-click to get a shortcut menu.*

Using the tool palette to customize fax cover pages

The tools available on the tool palette of the Fax Cover Page Editor can be divided into two groups: the Text and Drawing group, and the Alignment group.

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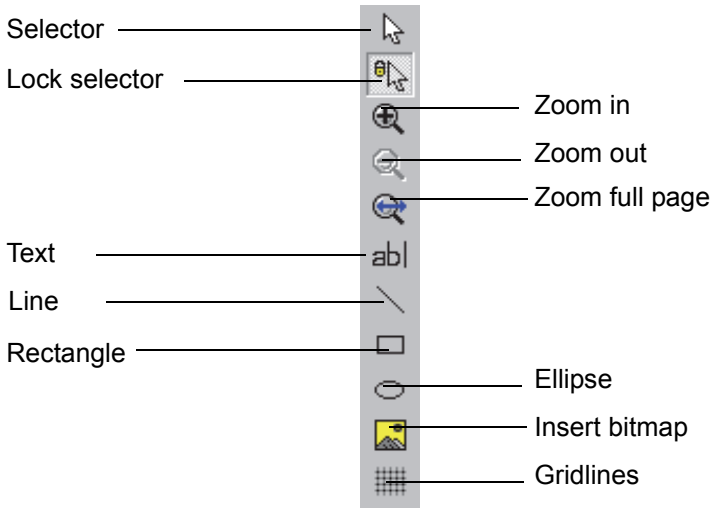
The tools in the Text and Drawing group allow you to draw shapes and insert text or bitmaps on the canvas. The drawing tools can be selected only from the tool palette. They allow you to select, use shapes, and zoom in on the canvas as you work on your design.



When it is enabled, the Lock selector tool allows you to use the pointer to select and insert a shape, line, or text on the canvas. Once you have inserted the item of your choice, the pointer resumes its standard function.

If you select and insert a shape, line, or text when the Selector tool is enabled, the selector tool does not resume the standard pointer function once you have inserted a shape, line, or text. The Selector tool continues to insert the drawing tool that you chose from the tool palette. It does so until you select the Lock selector tool. This disables the Selector tool.

To insert a shape

1. Select the Lock selector tool.
2. Select the shape that you want to insert.
3. Select on the canvas where you want to insert the shape and then drag down and to the right.
4. Release the mouse button to create the shape.

To reposition a shape on the canvas

1. Select the shape to select it.
2. Drag the shape to the position that you want.

> NOTE *You can turn on the gridlines. The gridlines help you to position shapes with ease on the canvas.*

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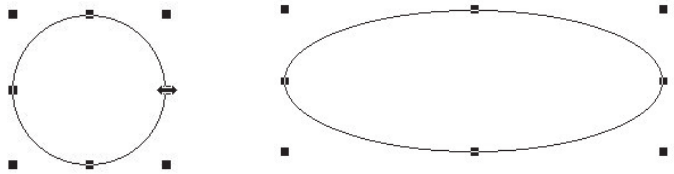
To change the shape and size of a shape

- Select a handle and drag to change the size or shape of the selected object.



For example, you can change the shape of a circle so that it becomes an ellipse by selecting the handle, as indicated, and dragging to the right.

To delete a shape

1. Select the shape that you want to delete.
2. Press **Delete**.

To draw a line

1. Select the Lock selector tool.
2. Select the Line tool.
3. Select on the canvas where you want the line to begin and drag to draw the line.
4. Release the mouse button to create the line.
5. Select anywhere on the canvas to cancel the selection.

To change or reposition a line

1. Select the line that you want to change to select it.
2. Do either of the following:
   - To shorten or extend the line, select one of the boxes at the end of the line and then drag as desired.
   - To reposition a line on the canvas, select the line and drag it to a new position.
3. Select anywhere on the canvas to cancel the selection.

To delete a line

1. Select the line you want to delete to select it.
2. Press **Delete**.

To insert text

1. Select the Lock selector tool.
2. Select the Text tool.
3. Select where you want to insert the text.
4. Drag down and to the right. A dotted text box appears on the canvas.

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5. Enter the text that you want to insert. Choose the font, size, and style commands on the toolbar to change the text.

To insert text in a text box

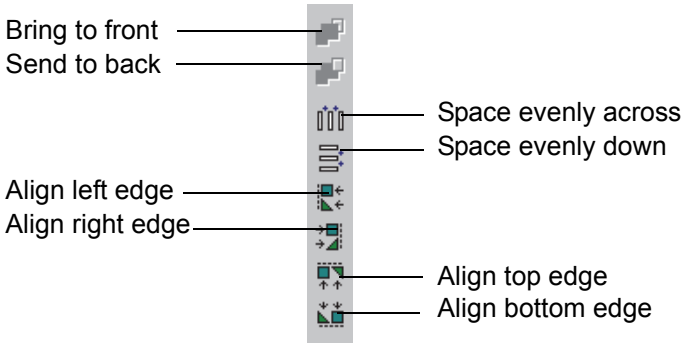
1. Select the lock selector tool.
2. Select the text tool.
3. Select where you want to insert the text box and then drag to the right and down. A dotted text box appears on the canvas.
4. Select **Format > Line, Fill and Color** to open the Line, Fill and Color menu box.
5. Select the **Draw border/line** check box. The text box lines are now solid.
6. Select line thickness from the **Thickness** box.
7. Enter the text in the text box. Change the font size and style as desired.

To insert a bitmap

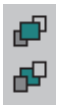
1. Select the Insert bitmap tool to open the Open menu box.
2. Select the bitmap that you want to insert.
3. Select **Open**. The bitmap is inserted on the canvas.

Using the Alignment tools to customize fax cover pages

The second group of tools in the Fax Cover Page Editor is the Alignment group. These tools are used to space or align selected objects on the canvas. Alignment tool commands can also be found in the Layout menu.



To move a shape to the front/back in relation to a second shape

1. Select the shape that you want to move to the front/send to the back to select it.
2. On the tool palette, select **Bring to front/Send to back**, as desired. 

   The shape that you selected is brought forward/sent back.

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To space two or more objects evenly across/down the canvas

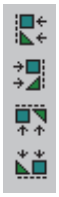
1. Select the objects that you want to space.
2. On the tool palette, select one of the following:
   - Space evenly across
   - Space evenly down

Spacing tools

The items that you selected are spaced evenly on the canvas.

To align two or more objects on the canvas

1. Select the objects that you want to align.
2. On the tool palette, select the alignment tool that you want to apply.



Alignment tools

The items that you selected are aligned by the edges that you specify.

To preview a fax cover page

1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the **Cover Pages** icon. The fax cover pages are listed in the summary pane.
3. Select the fax cover page that you want to preview.
4. In the detail pane, select **Download** to get the file from the server. The cover page appears in the detail pane.

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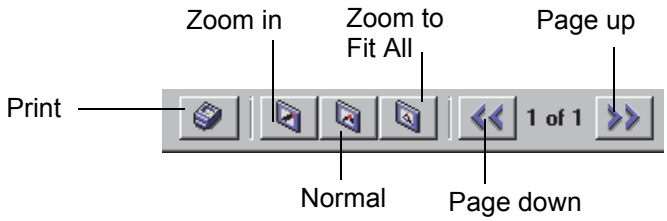
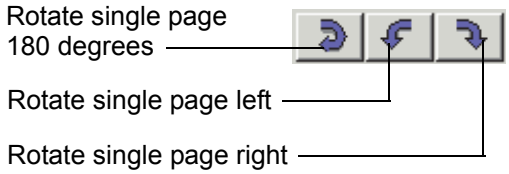
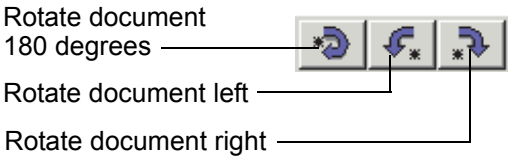
5. Use the cover page toolbar to view the cover page.







To rename a fax cover page

1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the **Cover Pages** icon. The fax cover pages are listed in the summary pane.
3. Right-click the cover page that you want to rename.
4. Select **Rename**.
5. Enter a new name for the cover page.
6. Select the icon of the new cover page to make the change.

To copy a fax cover page

1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the **Cover Pages** icon. The fax cover pages are listed in the summary pane.
3. Right-click the cover page that you want to copy.
4. Select **Duplicate**. The copy of the cover page appears in the summary pane, with “Copy of” before its name. You can rename the cover page if you want to.

To delete a fax cover page

1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the **Cover Pages** icon. The fax cover pages are listed in the summary pane.
3. Right-click the cover page that you want to delete.

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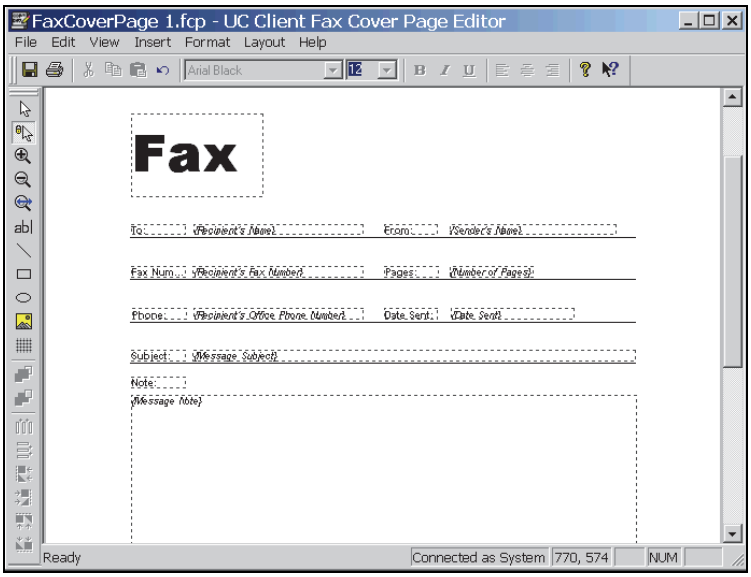
4. Select **Delete**.
5. Select **Yes** to confirm the deletion.

To edit a fax cover page

1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the **Cover Pages** icon. The fax cover pages are listed in the summary pane.
3. Right-click the cover page that you want to edit.
4. Select **Open**. The fax cover page is displayed in the Fax Cover Page Editor.



Use the toolbar and menu commands to change the fax cover page.

5. Select **File > Save**.

To send a cover page only using Quick Fax

The Quick Fax feature allows you to send a one-page fax message at any time, to as many recipients as you choose. When you use Quick Fax, you send only a cover page. Your messages appear in the subject area.

1. On the toolbar, select the **Quick Fax** icon to open the Fax Recipients menu box.

Quick Fax icon

2. Select **Addresses** to select recipients from your Outlook Contacts list. If you are not choosing a recipient from your Outlook Contacts list, enter the names and fax numbers.

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3. Select **Add to List** for each recipient that you specify.

> NOTE *To delete a recipient from the Recipient list, select the recipient and then select Remove.*

4. Select **Next** to open the Scheduling menu box.
5. Specify when you want to send the fax.

> NOTE *"When phone rates are discounted" means at midnight of the same day.*

6. Select **Next** to open the Select Cover Page menu box.
7. Select a cover page to use as your Quick Fax document.
8. Select **Next** to open the Cover Page Details menu box.
9. Enter the subject of your Quick Fax and then enter a message in the Notes section.
10. Select **Next** and the Finished menu appears.
11. Select **Finish**. The Quick Fax message is sent according to the instructions.

Receiving Faxes

There are different methods of receiving incoming faxes.

- The default behavior for incoming faxes is that the NetVanta UC Server detects the tone that signals a fax, the NetVanta UC Server receives the fax, and then stores it in a general mailbox. Using email, an office administrator can then distribute received faxes to user mailboxes. No configuration is required for this method to work, however, no notifications are sent to the user that they have a received a fax.
- A company can have a corporate fax attendant identity using a direct-inward-dial (DID) number, which receives all incoming faxes.
- A user can have a shared voice and fax number, using the same identity.

> NOTE *A shared voice and fax number is not recommended for high numbers of incoming fax calls. If an incoming fax call is answered at the user's extension, the user will have difficulties transferring the call into their service.*

Incoming faxes are received and viewed through a user's mailbox, for example, through Microsoft Outlook, Microsoft Exchange, Lotus Notes, or through an Integrated messaging client (a Mailboxes navigation bar on the user's NetVanta UC Client) or IMAP4.

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Notifying users of an incoming fax on a shared voice and fax identity

Personal Assistant (PA) users will be notified of an incoming fax using the same notification settings that are configured for Active Message Delivery, Email Notification, or Pager Notification. The settings of each of these options apply equally for voice and fax messages.

Personal Business Assistant (PBA) users can have an identity specifically dedicated to receiving faxes, using a direct-inward-dial (DID) number, and a custom service that defines the behavior when a fax is received.

Alternatively, PBA users can receive faxes on a shared voice and fax identity, but they are not automatically notified of incoming faxes. In order to receive notifications that a fax has been received, a Receive Fax service must be created.

The user or the administrator can create a Receive Fax service using the Receive Fax element. For more information on creating a Receive Fax service, refer to *Receive Fax element on page 115*.

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7. Creating Distribution Lists

Overview

You can use the Distribution Lists menu to manage personal distribution lists. Distribution lists allow you to send voice and fax messages to groups of users using the telephone. For information about using the distribution lists over the telephone, refer to *Managing distribution lists on page 20*.

Three folders are included with the Client application—Everyone, Personal, and System. The Everyone folder contains all the NetVanta UC Server users that are configured for the system. You cannot add a new folder to the Everyone folder.

You can use the System distribution lists over the phone but you cannot create or manage them. Your system administrator does this.

Record button ● ■ ▶ To create a personal distribution list

1. Select the **Distribution Lists** navigation bar to open the distribution lists menu.
2. Select the **Personal** folder.
3. In the right summary pane right-click, and select **New > Distribution List**.
4. Enter a Name for the distribution list folder.
5. Enter a unique number in the List Identifier field.
6. If you want to record an audio identifier for the distribution list, select **Record** and follow steps 2 to 7 in the procedure, *To record an audio identifier for a distribution list on page 84*.
7. Select **OK**.

To add a user to a distribution list

1. Select the folder that contains the user that you want to add to the list.
2. Drag the user name to the distribution list folder that you want to copy it to.

To delete a user from a distribution list

1. Select the folder that contains the user that you want to delete from the list.
2. Right-click the name of the user that you want to delete, and select **Delete**.

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To change distribution list information

1. From the Personal folder, right-click the personal distribution list that you want to change, and select **Open**.
2. In the General Information section, do either of the following:
   - Enter a new name in the Name field.
   - Enter a new number in the List Identifier field.
3. If you want to change the audio identifier, select **Record** and follow steps 3 to 7 of the procedure *To record an audio identifier for a distribution list on page 84*.
4. Select **OK**.

To rename a personal distribution list

1. Select the **Personal** folder, and right-click the distribution list that you want to rename, and select **Open**.
2. Enter a name for the distribution list, and select **OK**.

To copy a personal distribution list

1. From the Personal folder, right-click the distribution list that you want to copy.
2. Select **Duplicate**.

To delete a personal distribution list

From the Personal folder, right-click the distribution list that you want to delete, and select **Delete**.

To record an audio identifier for a distribution list

1. In the summary pane, right-click the personal distribution list for which you want to record an audio identifier, and select **Open**.
2. In the Audio Identifier section, select the **Record** button.
3. In the Record Identifier for section, select the **Record** button.
4. Make sure that the audio device you want is selected.
5. In the Insert new audio list, select **replace all**.
6. Select **record**. If you are using your telephone, wait for the beep before you begin to record.
7. Select **stop** when you are finished. If you used your telephone, you can hang up the phone or press the Release button on the phone to end the recording.
8. Select **play** to hear the recording.
9. Select **OK** to keep the recording.

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8. Creating Custom Call Answering Services

This chapter describes call answering services, managing services, and building services using the Service Editor. This chapter covers the following topics:

- *Overview on page 85*
- *Managing Services on page 86*
- *Using the Service Editor on page 90*
- *Working with Elements to Build a Service on page 92*
- *Customizing Services using Parameters on page 95*
- *Validating Services on page 95*
- *Troubleshooting Services on page 96*

Overview

A service is like a map that the NetVanta UC Server follows when it answers a call. Services are made up of elements that are linked together to create a call flow. You can design simple services made up of two or three elements, or you can create complex call flows made up of a dozen elements or more. Use the Service Editor to build a service.

You can build a service using the Service Editor and then assign it to an identity so that incoming calls follow the path that you specify. You can create a new service for the purposes of setting up a 1-800 line, a sales information line, or a line associated with a menu of options that callers can select to obtain specific information. Likewise, you can set up a fax-back service and activate it on an identity.

You can build a service using the Service Editor and then assign it to your extension so that incoming calls follow the path that you have specified.

For information about sharing services, refer to *Importing and Exporting on page 173*.

For information about designing and changing services, refer to *Using Elements to Create Call Answering Services on page 97*. Services can be renamed, copied, organized in folders, and deleted.

To create a service or change information associated with it, from the Administrator application:

To create a service or change information associated with it:

- Select the **Services** navigation bar to open the Services menu. Services are displayed in the summary

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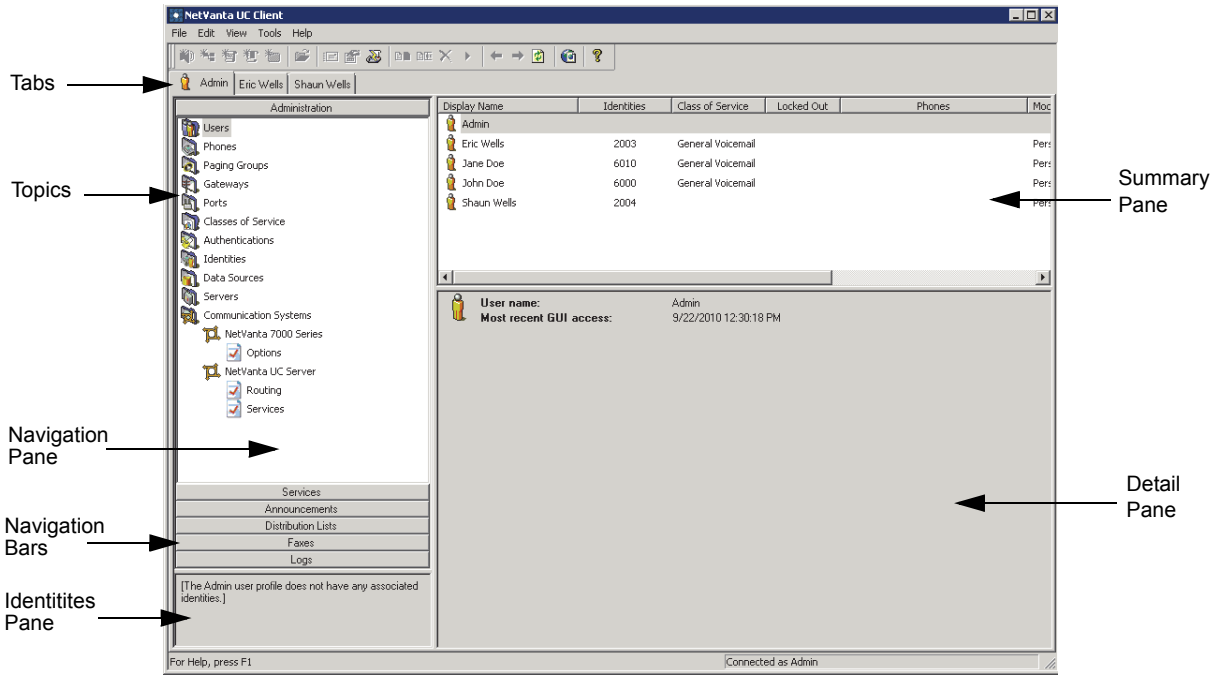
pane.



Managing Services

You can create a service, and then you can preview, activate, rename, copy, or delete that service. You can create and manage the folders in which you save your services.

> **NOTE** *ADTRAN has provided some samples services to get you started. Before creating a new service, preview the samples provided to see if a sample service exists that is similar to what you are looking so. If you find a similar service, copy it, rename it, and then modify it suit your needs.*

> **NOTE** *Many of the sample services provided by ADTRAN use database integration. If your NetVanta UC Server version is not licensed for database integration then the database elements used in the sample services will not work as intended.*

To create a service

1. Right-click anywhere in the summary pane.
2. Select **New > Service** to add a new service to the list in the summary pane. The service icon denotes the new service and the default name is “Service.”

Service icon

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3. Enter a name for the service.

> *You can also right-click the service and then select **Rename**. Enter the new name again, and then select the icon next to the service name to make the change.*

In addition to services that you create, you also have access to shared services that the Administrator creates and manages. You cannot save changes that you make to shared services. You can copy a shared service and assign it to an auto attendent, or use it as a template to create a service of your own.

To copy a shared service

1. In the Services navigation pane, double-click the **Shared** folder.
2. Select the shared service that you want to copy.
3. Hold down the **CTRL** key and drag the service to the folder to which you want to copy it.

Working with services

When you select the Services navigation bar, the services you create are listed by name in the summary pane. You can use the Service Editor to view a service and change it. If you want only an overview of a service, you can preview it in the Services menu.

To preview a service

1. In the summary pane, select the service that you want to preview.
2. If the service is in the cache, it appears immediately in the detail pane. Otherwise, select the **Download** button in the detail pane to get the preview.

To activate a service on an identity

1. Right-click the service that you want to activate, and select **Activate Service**.
2. In the **Activate on** section, enable the check box of the identity, or identities, to which you want to assign the service. The **Already activated on** section allows you to see on which user identities the service is already active.
3. Select **OK**.

To activate a service on your extension

1. Right-click the service that you want to activate, and select **Activate Service**.
2. Enable the extensions that you want to activate the service on, and select **OK**.

> *The service must already be created and validated before activating it.*

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> *Once you have activated a service on your extension, you cannot "deactivate" that service. To change the service, activate another service on your extension.*

To rename a service

1. Right-click the service that you want to rename.
2. Select **Rename**.
3. Enter the new name for the service.
4. Select the icon next to the service name to make the change.

To copy a service

1. Right-click the service that you want to copy.
2. Select **Duplicate**. The copy of the service appears in the summary pane, with the words "Copy of" before its name.
3. Rename the copy of the service by following all the steps in *To rename a service on page 88*.

To delete a service

1. Right-click the service that you want to delete.
2. Select **Delete**.
3. Select **Yes** to confirm the deletion.

Creating and changing service folders

You can create and manage folders in much the same way as services, and you can use folders to organize your services. For example, you can create a folder for each of your identities and then store associated services in it.

When you want to change the active service on an identity, you can quickly do so if related services are kept in the same folder. You might have built some services that you are not currently using, for example, those designed for statutory holidays. Store these together in a folder called "Holidays," and then retrieve them when you need them.

You can create and manage folders in much the same way as services, and you can use folders to organize your services.

> *Only one service can be active on your extension at any time.*

When you want to change the active service on your extension, you can do so quickly if related services

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are kept in the same folder. You might have built some services that you are not currently using, for example, those designed for statutory holidays. You can store these together in a folder called “Holidays,” and then retrieve them when you need them.

To create a folder

1. Right-click anywhere in the summary pane.
2. Select **New > Folder** to add a new folder to the list in the summary pane. The folder icon denotes the new folder and the default name is “New Folder.”

Folder icon

3. Enter a name for the folder.

> *You can also right-click the folder and then select **Rename**. Enter the new name again, and then select the icon next to the folder name to make the change.*

To rename a folder

1. Right-click the folder that you want to rename.
2. Select **Rename**.
3. Enter the new name for the folder.
4. Select the icon next to the folder name to make the change.

To copy a folder

1. In the summary pane, right-click the folder that you want to copy.
2. Select **Duplicate**. The copy of the folder appears in the summary pane, with the words “Copy of” before its name.
3. Rename the copy of the folder.
4. Select the icon next to the folder name to make the change.

To delete a folder

1. Right-click the folder that you want to delete.
2. Select **Delete**.
3. Select **Yes** to confirm the deletion.

To store a service in a folder

- Drag the service to the folder where you want to store it.

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Using the Service Editor

To access the Service Editor

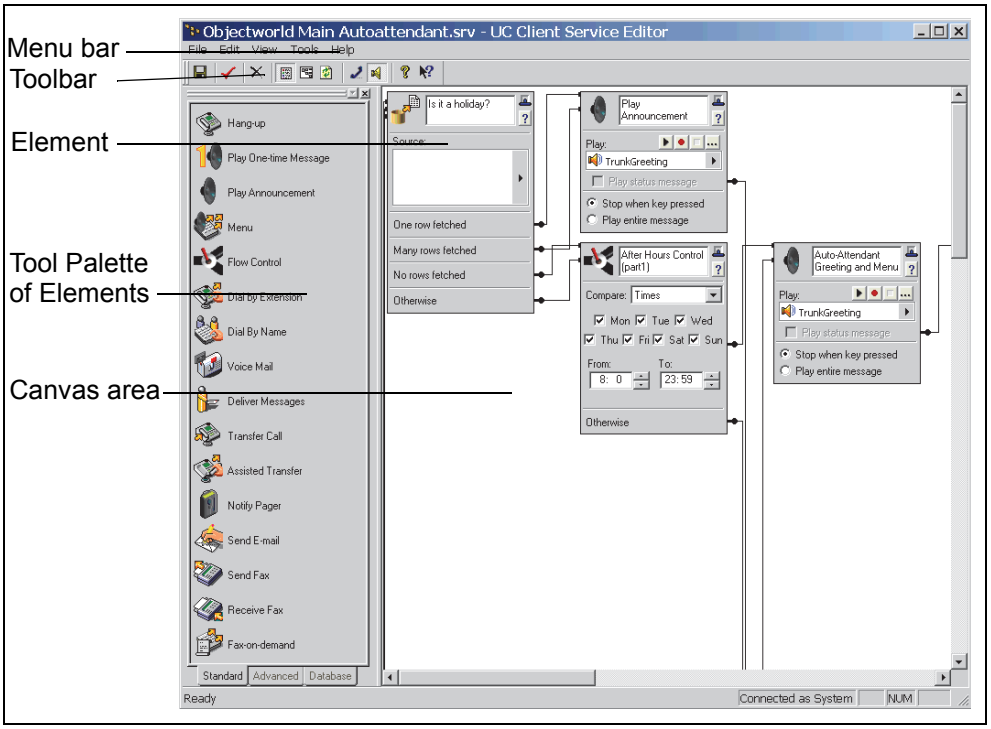
From the Administrator application:

From the application:

1. Select the **Services** navigation bar to open the Services menu. Services are displayed in the summary pane.
2. To open the Service Editor, right-click anywhere in the summary pane. In the shortcut menu, select **New > Service**. The newly created service is listed in the summary pane. Double-click the service and the Service Editor opens.

> NOTE *Alternatively, you can open the Service Editor by double-clicking an existing service.*

The Service Editor consists of a standard Menu Bar and Toolbar, a Tool Palette of Elements, and a Canvas



area. You design a service on the canvas using a combination of elements that you choose from the tool palette.

The **Menu Bar** contains the File, Edit, View, Tools, and Help menus. Use these menus to manage the service design.

The **Toolbar** contains visual shortcuts to the most frequently used menu items. Hold the pointer over a

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button to show the tool tips.

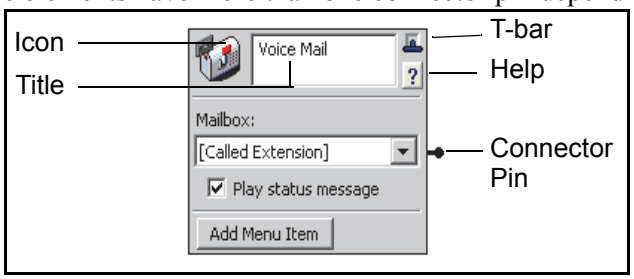
The **Tool Palette** contains all available elements. It has Standard, Advanced, and Database element tabs. You can dock the Tool Palette to either side of the window.

> **NOTE** *To access database information, the system must be licensed for database integration. If you are not licensed for database integration, the Database tab in the Service Editor is unavailable.*

The **canvas** is the design area. All elements and links are shown here. Each element performs a separate function within the call flow. Connections between elements are referred to as links, and they define the call flow.

To view an element

- Drag an element from the tool palette to the canvas. The element is automatically positioned in the top-left corner. Each Element has an icon, title area, T-bar control, help button, and a connector pin associated with it. Some elements have more than one connector pin depending on their function.

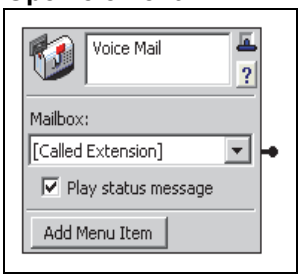


The **Icon** is a visual representation of the element type.

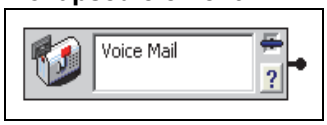
In the **Title** area you can enter a description of the element's function.

The **T-bar** control displays the properties associated with the element. To save canvas space, select the T-bar control to collapse the element as needed. To restore information about a collapsed element, select its T-bar control. The three modes of display are illustrated below.

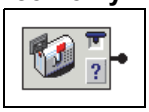
Open element



Collapsed element



Icon only



Select the **Help** button to access the appropriate help page.

The **Connector Pin** on the element is used to make a connection to the next element in the call flow. An element might have more than one connector pin, depending on its function. If you do not connect at least

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one pin to another element, the call is terminated.

Working with Elements to Build a Service

To build a call flow for incoming calls, you need to create a service and then open the Service Editor. To begin the call flow, drag elements one by one from the tool palette and link them using the connector pins. Repeat this procedure with as many elements as you need until the service is complete.

To create a service

1. Open the Services menu.
2. Right-click anywhere in the summary pane.
3. Select **New > Service** to add a new service to the list in the summary pane. The service icon denotes the new service and the default name is "Service."

Service icon

4. Enter a name for the service. If you are unable to enter the name, right-click the service and then select Rename. Enter the new name, and then select the icon next to the service name to make the change.

To initiate a call flow for a new service

1. Double-click the new service to start the Service Editor.
2. Drag an element from the tool palette to the canvas to start the call flow. The element is automatically positioned in the top-left corner.

NOTE

The Service Editor's default menu displays the Standard elements tab. To view advanced or database elements, select the Advanced or Database tab located at the bottom-left corner of the menu.

The Database tab is available only if the system is licensed for database integration.

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To add an element to the call flow

1. Right-click the connector pin of the first element that you put on the canvas, and then select **Insert**.
2. In the shortcut menu of standard elements, select the element that you want to add. The element is linked to the first one that you put on the canvas.

> NOTE *To access the shortcut menu of advanced or database elements, select Advanced or Database on the standard elements shortcut menu. The Database tab is available only if your system is licensed for database integration.*

> NOTE *You can also drag the element that you want from the tool palette to the canvas. Position the pointer over the connector pin of the existing element until a red box appears around the connector pin, and then drop the new element onto the canvas.*

Build a service by adding elements until the call flow is complete.

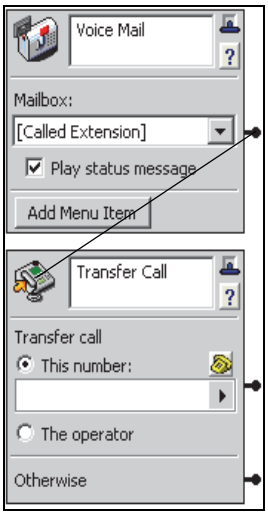
Using and deleting links

If you link two elements and then change your mind, you can delete the link and reuse the element in the service.

To delete a link between two elements

1. Right-click the connector pin linking the two elements that you want to separate.
2. Select **Delete link** to delete the link.

When you delete a link between two elements, the elements are no longer connected on the canvas. At first glance, one of the elements seems to have been deleted because it disappears from the place it occupied in the call flow. The element is repositioned at the bottom-left corner of the canvas. From there, you can connect it elsewhere in the call flow by linking it with another existing element.



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To link existing elements

1. Select and drag from the connector pin to the icon of the element that you want to link.
2. Release the mouse button to link the elements.If you link an element and then decide that you no longer want to include it in the call flow, you can delete the element from the canvas.

To delete an element from the canvas

1. Select the icon of the element that you want to delete to highlight the element.

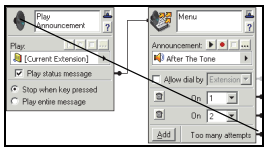
2. Select Delete on the toolbar to delete the element from the canvas, or press the Delete key.

Creating loop-back links

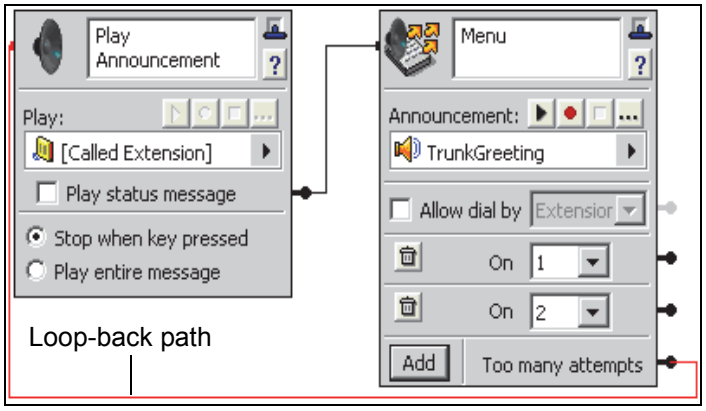
A loop-back link returns a call to a preceding element in the call flow. Loop-back links are useful for repeating a set of menu options or for restating instructions to a caller who has failed to make a selection on the phone keypad following a prompt.

To create a loop-back link

1. Select the connector pin and drag to the element icon that you want to loop back to.



2. Release the mouse to create the loop-back link.
3. Point to the connector link. The loop-back path is highlighted in red.



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Customizing Services using Parameters

You can use additional parameters in order to customize services. Parameters can be used in most elements that accept input, such as email addresses, log entries, transfer numbers, or database comparisons. Parameters can also be used in the **Equals** field in the Data Source Selector. For more information, refer to *Using the Data Source Selector on page 159*.

Parameters can be used with the following elements:

- The Assisted Transfer, Transfer Call, Deliver Messages, Notify Pager, and Send Fax elements.
- The Send Email element.
- The Text To Speech element.
- The Compare Data element.
- The Create Log Entry element.

Note that parameters can be used to obtain a specific record from a database.

Parameter	Value	Description
-pm	Additional Parameters List	This is a comma separated list of additional parameters that are passed to the service when it executes. These values can be accessed within a service definition as special Text values whose names are Parameter1, Parameter2, and so on. The first value in the list becomes the value of Parameter1 and so forth.

In the service editor, parameters are not visible by default. Once enabled, you can select parameters for the elements that use them.

To view parameters

1. From the Services navigation bar, right-click in the summary pane, select **New > Service**.
2. Select the service, right-click and select **Open** to open the Service Editor.
3. In the Service Editor, select **View > Parameters** to enable the Parameters. Once Parameters are enabled, then parameter values are available for selection.

Validating Services

After you finish building your service, you can validate it. The Service Editor inspects the service for logical errors or unresolved aspects of the call flow. If there is a problem with your service design, a message box appears with information about the changes that you need to make.

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To validate a service

1. On the toolbar, select the check mark.

2. If the Service Editor message informs you that the service is valid, select OK. Otherwise, follow the Service Editor's suggestions about how to change your service to make it valid.

Troubleshooting Services

If you are having trouble running services, note that particular issues may be noted in the log files. The following is a list of potential service warnings that may be noted in the System Errors and Warning logs. To troubleshoot a warning, locate the log entry below, and note the possible causes of and solutions for the warning.

> **NOTE** *Not all errors and warnings necessarily require action. For more information on logs, refer to* *Using the NetVanta UC Server Logs on page 185*.

To view service warning logs

1. Select the **Logs** navigation bar to open the Logs menu. All logs are presented in the Content menu.
2. If the logs are not already sorted into categories, then double-click the **Logs** folder.
3. Select **System Errors and Warnings** to view the logs in that category.
4. Verify whether either of the following entries appear.

Log Entry	Possible Causes and Solutions
Failed to update %s's database with the received fax. The fax will be saved instead to the default mailbox.	There was a problem communicating with the database defined in the Receive Fax element. Check your database connection parameters, and ensure that the database is available.
The data source, %s, referenced in the element, %s, is unknown.	ServiceStateMachine when an element refers to a data source that no longer exists. Verify the following: 1.The ODBC data source, if applicable, is correctly configured 2.The fields in the reference data source may have been changed or deleted. Verify the data source configuration.

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9. Using Elements to Create Call Answering Services

Elements are the building blocks of the services that you create for identities. By combining elements on the canvas of the **Service Editor**, you design a call flow that routes incoming calls.

Elements are the building blocks of the services that you create for use on your extension. By combining elements on the canvas of the Service Editor, you design a call flow that routes incoming calls.

Elements are on the tool palette of the Service Editor. They are divided into three groups: standard, advanced, and database. Each group has its own tab.

> NOTE
> *To access database information, the system must be licensed for database integration. If you are not licensed for database integration, the* ***Database*** *tab is unavailable. For more information, refer to* *Using Database Elements on page 163*.

This chapter presents information about the individual elements that you use to build a service. This chapter covers the following topics:

- *Service Element Settings and Features on page 97*
- *Using Standard Elements on page 101*
- *Using Advanced Elements on page 119*

> NOTE
> *If your system is licensed for database integration then you will also have a Database elements tab available. For more information, refer to* *Using Database Elements on page 163*.

Service Element Settings and Features

This section describes the settings that affect the behavior of certain service elements and some global features available in many service elements.

For some of the standard elements, such as Transfer callers, Deliver messages, Pager notification, Fax on demand, and the Fax Wizard, you can specify an account code. An account code is a specified set of digits that the caller must enter after completing the dialing pattern. Account codes represent an accounting category, for example, expenditures, revenues, or salaries. They are also used to ensure security so that a caller who does not have an account code cannot access specified information.

You can use account codes to allow long distance dialing, in which the telephone company applies the long distance charges to your account code.

You can set a default account code that applies to any service. If the administrator has enabled the use of account codes, you can specify the account that you want callers to use.

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User Context and Service Elements

When you start a service, it begins by operating in the context of the user who owns the identity (for example, the extension) that received the call. The different service elements access mailboxes and objects that are related to this user context. You can change the user context by modifying the service.

The user context of the service is characterized by an authentication and a user profile (that is accessible from the authentication).

A service is associated with an identity. When a service starts, the identity is used to locate a user profile (the one that owns the identity). The user context is then established with the user profile that owns the identity and the authentication that owns that profile.

Elements cannot change the user context. In particular, **Transfer Call**, **Dial by Name**, **Dial by Extension**, and **Select Extension**, do not change the user context. The **Select Extension** element causes the selected extension to be saved in the current call object so that it can be used by other elements.

Elements cannot change the user context. In particular, Transfer Call does not change the user context.

Synchronizing Contacts

The **Synchronize contacts** mode is only available to users who have a client-side contact database, where contacts are stored on a user's computer and not on a server like Microsoft Exchange. Examples of client-side contact databases include Microsoft Outlook (running in **Internet Only Mode**), Outlook Express, and Windows Address Book.

The NetVanta UC Server cannot access contacts that are stored in client-side contact databases; therefore, in order to perform real-time contact matching, this contact information must be copied and stored locally on the server computer. Client-side contacts are synchronized with the server computer every time a user starts or shuts down the NetVanta UC Client . If a user makes changes to their client-side contact database while the NetVanta UC Client is open and they want the NetVanta UC Server to recognize these changes without having to shut down and restart their NetVanta UC Client, the user can force a contact synchronization by using **Synchronize contacts**.

To synchronize a user’s contacts to the NetVanta UC Server software

On the menu bar, select **Tools** > **Synchronize contacts**.

Selecting Values Within Elements Using the Value Selector

Use the value selector ▸ feature available on some elements to specify the following types of values:

Literal values	For example, a number or piece of text
References to data files	For example, a fax, announcement, or greeting
References to database values	References that have been fetched from a database
System values	For example, caller ID
Strings of digits	Gathered by a **Gather Digits** element

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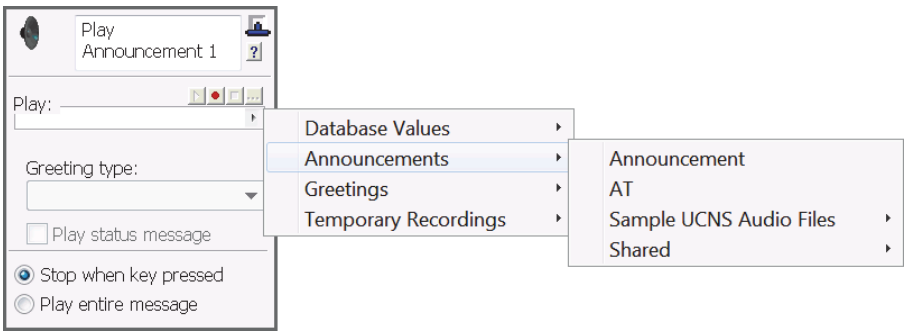
For example, the **Play Announcement** element allows you to play a dynamic value, announcement, greeting, or temporary recording to a caller that encounters the element in a service.



The values that are available using the value selector depend on how your service and system are set up. For example, to use database values, a database element type must be included in the service. To specify **Gather Digits** values, a **Gather Digits** element must be included in the service.

> NOTE
> *To use database values and elements, your system must be licensed for database integration.*

Allowing Callers to Make Temporary Recordings Within a Service

Some elements allow you to select audio files such as announcements, greetings, database values, or temporary recordings. Using the **Record Announcement** element, a caller can record audio into a temporary recording, and elements like **Play Announcement** can be used to play the audio.

Temporary recordings exist only for the duration of the service. That is, when a service starts, no temporary recordings exist. If a caller makes a temporary recording, the recording is stored in a temporary file that can be played by another element. All temporary recordings are discarded when the service ends. Up to ten temporary recordings can be created.

Temporary recordings can be referenced in the following elements:

- Play Announcement element
- Menu element
- Send Email element (custom)
- Record Announcement element
- Add Data element
- Update Data element

> NOTE
> *In order to use the **Add Data** and **Update Data** elements, your system must be licensed for database integration.*

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Temporary recordings can be used with a **Send Email** element, or **Add Data** and **Update Data** elements to record audio for form-filling applications, such as requesting quotes or answering general customer service questions.

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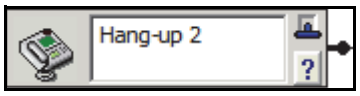
Using Standard Elements

Select the **Standard** tab on the tool palette to view the standard elements. The following table gives a brief description of each available element.

Table 9–1:

Hang-up element on page 9	Terminates the call
Play One-time Message element on page 10	Allows you to leave a personalized message for a specific caller
Play Announcement element on page 10	Plays a prerecorded announcement to callers
Menu element on page 13	Allows callers to make a selection using the telephone keypad
Flow control element on page 14	Controls the call flow according to phone number or time and day restrictions
Voicemail element on page 16	Provides basic voicemail service
Deliver Messages element on page 16	Delivers voice or fax messages from a selected mailbox to a specified number
Transfer Call element on page 18	Transfers the call to another number or extension
Assisted Transfer element on page 19	Allows a transfer call recipient to accept or deny a call based on the caller's recorded name
Notify Pager element on page 20	Enables you to send a message from the application to a pager number
Send Email element on page 21	Allows you to be notified by email when a caller moves successfully through the Send Email element
Send Fax element on page 23	Allows you to send a list of faxes
Receive Fax element on page 24	Receives a fax and puts it in a mailbox
Fax-on-demand element on page 27	Captures a caller's number and faxes the selected document to a caller

Hang-up Element



The **Hang-up** element terminates the current incoming call. If a call is present, this element terminates the call.The same result occurs if a call flow leads to an unconnected connector pin.

Play One-time Message Element

Including the **Play One-time Message** element in a service allows you to leave a personalized message for a specific caller. Once a message has played, the call flow follows the **Message played** connection. Calls for which there is no customized message follow the **No message for current caller** connection. Enable the **Stop when key pressed** button to stop the message when the caller presses a key. Enable the **Play entire message** button to make sure that the caller listens to the message in its entirety.

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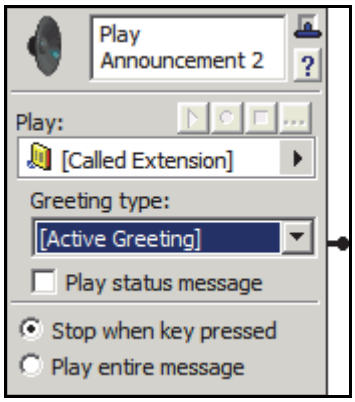
> **NOTE** *You must use the One-time Messages pane of the Assistant menu to record customized one-time messages. Refer to* *"Customizing your Mailbox" on page 15**, for more information about the One-time Messages pane.*

Play Announcement element



The **Play Announcement** element plays prerecorded audio to callers including audio files stored in a database, announcements, greetings, or temporary recordings. You can select one of the prerecorded announcements included with the NetVanta UC Server, or one that you recorded. Alternatively, you can record one as you build the call flow.

> **NOTE** *For the **Play Announcement** element to function, there must be a sound card installed on the server computer.*

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The greeting type is only enabled if **Greetings** was selected for the **Play** mode.

Database Values	Supports playing audio stored in a Data Source. The audio must first be fetched using a *Fetch Data element on page 164*, or a *Dial for Data element on page 165*. Database values come from a Data Source element and are not directly affected by user context. **Note**: Your system must be licensed for database integration in order to use this mode. In the Service Editor, if you have the Database tab of elements available, then your system is licensed for database integration.
Announcements	Announcements come from the list that belongs to the user profile in the user context. For more information, refer to *User Context and Service Elements on page 98*.
Greetings	You can select **[Called Extension]**or [Selected Extension]. The **[Selected Extension]** mode is available to Administrators only. If you select **Greetings**, then select a greeting type, as described below.
Temporary Recordings	Temporary recordings can be used to record audio temporarily, after a service has started. Use the *Record Announcement Element on page 120* to record the audio for a specific temporary recording. The recordings are then stored in a temporary file, which can be played by another element that plays audio such as the **Play Announcement** element. All temporary recordings are discarded when the service ends. Up to 10 temporary recordings can be made. For more information on temporary recordings, refer to *Allowing Callers to Make Temporary Recordings Within a Service on page 99*.

Active Greeting	This is the default greeting.
Internal Greeting	Internal greetings are intended for callers calling from extensions at your workplace.
External Greeting	External greetings are intended for callers calling from outside your workplace.
Out-of-Office Greeting	Out-of-Office greetings are typically enabled when you are out of the office for an extended period of time.
Mailbox Identifier	The mailbox identifier consists of your name. This greeting is typically used when callers are transferred to your extension.

Several additional options are available in addition to the greeting type:

You do not need to specify the mailbox from which the greeting is played. Your system administrator does this.

- The **Play status message** mode preempts the user's greeting message with a status message and cannot be interrupted.
- The **Stop when key pressed** button allows a caller to stop the message by pressing a key.
- The **Play entire message** button ensures that the caller listens to the message in its entirety before further action can be taken.

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To record an announcement for a Play Announcement element

1. On the **Play Announcement** element, select ●. The **Select Announcement** menu box appears.
2. In the **Select Announcement** menu box, enter a name for the announcement that you want to record.
3. Select **Select** to start the **NetVanta UC Client Audio Editor**.
4. In the tool bar at the top of the **NetVanta UC Client Audio Editor**, select ●. The **Record Audio** menu box appears.
5. From the **Insert new audio** drop-down menu, select **at the beginning** .
6. Select the button for the computer audio device. The button is enclosed by a dotted line.
7. Select ● and then record the message. As you record, the clock runs and the red record button turns grey.
8. Select ■ when you are finished recording.
9. Select **OK** to keep the announcement and return to the **NetVanta UC Client Audio Editor**.
10. In the **NetVanta UC Client Audio Editor** menu bar, **s**elect **File > Update** to update the recorded audio announcement.

To play a greeting from a mailbox using a Play Announcement element

1. On the **Play Announcement** element, select the value selector ▶ on the **Play** field.
2. Select **Greetings > [Called Extension]** to fetch the greeting from the user profile in the current user context.

To enable the Play status message mode for greetings

On the **Play Announcement** element, enable the **Play status message button**.

> NOTE
> *Make sure that the **Play status message** mode is enabled on a corresponding **Voicemail** element (refer to Voicemail element on page 107).*

To play temporary recordings

On the **Play Announcement** element, select the value selector ▶, select **Temporary Recordings**, and select one of the ten temporary recordings available.

> NOTE
> *You must use the **Record Announcement** element in the service in order for a caller to record the temporary audio file. For more information on temporary recordings, refer to Allowing Callers to Make Temporary Recordings Within a Service on page 99.*

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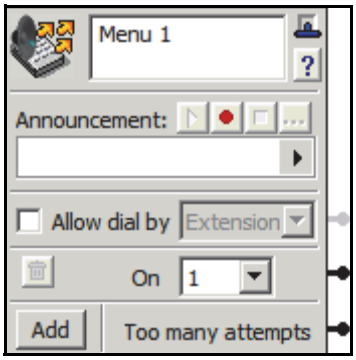
Menu Element



The **Menu** element allows you to make an announcement and then direct the call flow based on the DTMF input received when a caller presses a number on the telephone keypad.

This element can play an announcement, database value, greeting, or temporary recording before it takes the specified menu action. It retrieves announcements from the set of announcements that belong to the user profile in the user context. Database values come from a Data Source element and are not affected directly by user context. The service retrieves greetings from an explicit user, if such a user is specified. If you specify [Called Extension], the greeting is fetched from the user profile in the user context.

Temporary recordings are created using the **Record Announcement** element, to record the audio for a specific temporary recording after a service has started, which is discarded after the service ends. For more information on temporary recordings, refer to *Allowing Callers to Make Temporary Recordings Within a Service on page 99*.

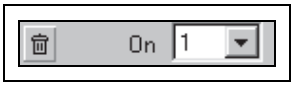
When **Allow dial by Extension** is enabled, the caller can dial a user by entering the user's extension. When **Allow dial by Name** is enabled, the caller can dial a user by entering the first few characters of a NetVanta UC Server user's last name.

Callers are allowed to try three times to select from the menu. If they make another attempt, they follow the **Too many attempts** connector pin.

When callers press a selection key, they move through the connector pin to the next element, depending on their choice. When you are finished setting selection keys, you can connect an element for each selection key that you set.

To set selection keys on a Menu element

1. In the first **On** drop-down menu, select the number that you want. The number one appears by default.
2. Select **Add** to add an **On** drop-down menu for setting additional keys. The NetVanta UC Server enters the key in numerical sequence. You can also select a key from the drop-down menu. You can set a maximum of 12 keys. Keys range from one to nine, then include zero, *, and #.
3. To delete a selection key on a **Menu** element, select the to the left of the key that you want to delete. Remember to change the announcement associated with the menu so that it reflects the changes.



> NOTE
> *For information about recording an announcement for the **Menu** element, refer to To record an announcement for a Play Announcement element on page 104.*

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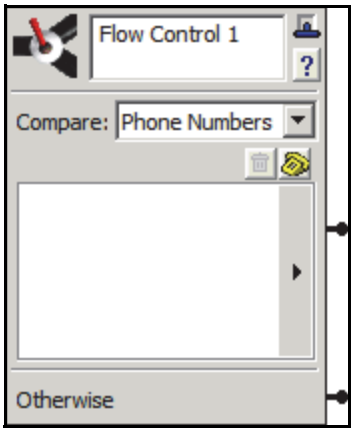
Flow Control Element



The **Flow Control** element acts as a decision tree, and allows for two different comparison methods: matching based on phone numbers or on time of day and date. The call will be routed to the next element based on a successful or failed match (a failed match routes the call through the **Otherwise** connector pin). You can select either Phone Numbers or Times, which determines the comparison element.

For example, you could use the **Flow Control** element with a **Receive Fax** element to call your cell phone, send a pager notification, or send an email to your personal email address, to notify you when you receive a fax from a particular number after business hours.

Routing incoming calls based on phone numbers

The NetVanta UC Server compares the incoming caller ID to those telephone numbers included in the **Flow Control** element list. Telephone numbers in the list can be entered manually, or they can be pulled from your contact address book by using the value selector ▶.

For more information, refer to *Selecting Values Within Elements Using the Value Selector on page 98*. For information about contact address book synchronization, refer to *Synchronizing Contacts on page 98*.

The NetVanta UC Server compares the numbers of incoming calls with those included in the list.

- If the numbers match, the call is routed to the subsequent element that you specify.
- If the numbers do not match, the call moves to the element connected to the **Otherwise** connector pin.

To set call flow according to an unknown phone number category

1. On the **Flow Control** element in the **Compare** drop-down menu, select **Phone Numbers**.
2. Select the value selector ▶.
3. Select **Contacts > Unknown**.
4. Select one of the following categories:
   - Unknown Number
   - Private/Blocked Number
   - Out-of-area Number

To enter a phone number manually

1. On the **Flow Control** element in the **Compare** drop-down menu, select **Phone Numbers**.
2. Select the telephone button to open the **Enter Phone Number** menu box.

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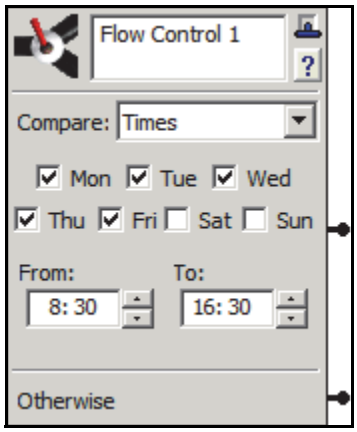
3. Enter the desired phone number in the **Telephone number** field, and select **OK**.

> NOTE
> *You can also enter a phone number by right-clicking the blank field in the **Flow Control** element and selecting **New** from the drop-down menu.*



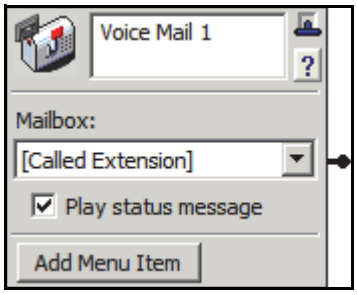
You can specify days of the week and a time range. For time restrictions, if either the **From** or **To** field is empty, a 24-hour period is assumed.

- Calls received within the specified time range are directed through the **Times** connector pin.
- Calls received outside the specified time range move to the element connected to the **Otherwise** connector pin.

To set call flow according to time restrictions

1. On the **Flow Control** element from the **Compare** drop-down menu, select **Times**.
2. Enable the check boxes for the days of the week when the restrictions apply.
3. In the **From** field, select the hour and minutes when the time restriction begins. Use a 24-hour clock.
4. In the **To** field, select the hour and minutes when the time restriction ends. Use a 24-hour clock.

Voicemail element



The **Voicemail** element provides basic voicemail service. It plays the mailbox greeting and can take a message from a caller. If the caller presses the access number for mailbox management, the **Voicemail** element allows mailbox management for the specified mailbox.You do not need to specify the mailbox where messages are stored. Your system administrator does this.

The **Play status message** mode is enabled by default. The status message pre-empts the user's greeting message and cannot be interrupted. Make sure the **Play status message** mode is also enabled on a **Play Announcement** element, if required.

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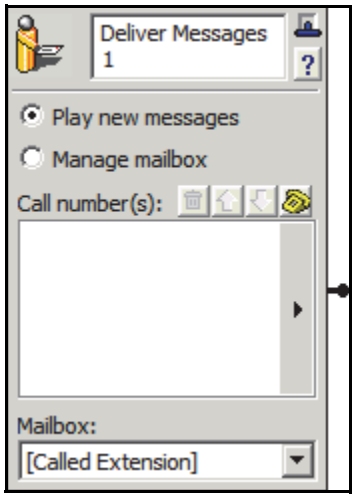
Deliver Messages element



The **Deliver Messages** element sends voice and fax messages from a selected mailbox to the phone numbers that you specify. **Called Extension** refers to the identity originally called. **Selected Extension** refers to the identity selected in the last successful **Select Extension** element in the service. If there was none, or the last one failed, it defaults to be the same as the **Called Extension**.

The NetVanta UC Server calls the sequence of numbers, in the order that you specify, until the call is answered. The call recipient must enter the password associated with the selected mailbox to retrieve messages over the phone. You can limit deliveries to new messages or allow full mailbox management.

Specify call numbers by using the telephone button, or use the value selector . For more information, refer to *Selecting Values Within Elements Using the Value Selector on page 98*. For information about contact address book synchronization, refer to *Synchronizing Contacts on page 98*.

You do not need to specify the mailbox from which messages are sent. Your system administrator does this, so that messages for your extension are stored in your mailbox and delivered from there.**To specify phone numbers for the Deliver Messages element**

1. Select the telephone button.
2. In the **Enter Phone Number** menu box, enter a phone number in the **Telephone number** field.

> NOTE *You can also enter a phone number by right-clicking inside the **Call number(s)** field and selecting **New**.*

3. If you want to specify an account code, select the **Use account code** check box and enter an account code in the field.
4. Select **OK**. The target number appears in the **Call Number(s)** field. The NetVanta UC Server calls the target number when it attempts to deliver messages.
5. Repeat steps 1 to 3 to add more target numbers to the field. The NetVanta UC Server calls each number in the field, according to the order you specify, until the call is answered.

> NOTE *Refer to Selecting Values Within Elements Using the Value Selector on page 98 to select a dynamic value for the element.*

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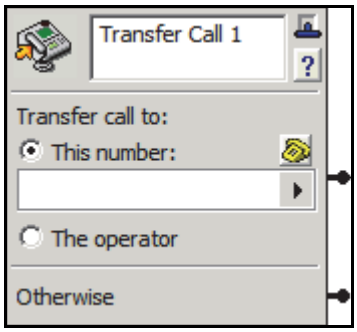
To change the sequence of target phone numbers listed for Deliver Messages

1. Select the number whose ranking you want to change.
2. Select an arrow to arrange the order of the numbers in the field.

To delete a target phone number from the list for Deliver Messages

1. Select the telephone number that you want to delete.
2. Select the trash can .

Transfer Call element



The **Transfer Call** element transfers calls to another number.

If the transfer fails, the caller leaves the element through the **Otherwise** connector pin. The NetVanta UC Server automatically adds a **Voicemail** element to the **Otherwise** connector pin if you do not add an element.

You can specify an account code only if the Administrator enabled the account code feature.

The telephone number that you specify is subject to the outgoing call restrictions that are specified by the Administrator.

To specify a transfer target for the Transfer Call element

1. In the **Transfer call to** section, select one of the following:
   - **This number**—if you want to specify a number to transfer callers to
   - **The operator**—if you want to transfer callers to the operator
2. If you selected **this number**, do one of the following:
   - Use thevalue selector to specify a value.
   - Select the telephone button, and enter the number where you want to transfer the caller.
   - Right-click the **This number** field, select **New**, and enter the phone number that you want.

> NOTE
> *For information about selecting a dynamic value using a* value selector *, refer to* *Selecting Values Within Elements Using the Value Selector on page 98**. For information about contact address book synchronization, refer to* *Synchronizing Contacts on page 98**.*

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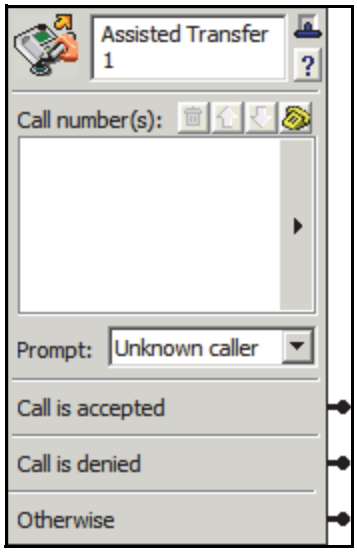
Assisted Transfer element



The **Assisted Transfer** element allows a transfer call recipient to accept or deny a call based on the caller's recorded name..

You can enter the telephone number to which you want to transfer calls. Specify the conditions under which you want to prompt callers to record their name. When you enter a list of telephone numbers, calls are transferred to the numbers in the order that they appear. You can use the arrow buttons to change the order of numbers in the list

A call moves to the element connected to the **Call is accepted** connector pin when the transfer recipient answers and accepts the call. A call that is answered, and then declined by the recipient, moves to the element connected to the **Call is denied** connector pin.

If the call is not answered, is answered but not accepted within 10 seconds, or is transferred to an invalid number, the call moves to the element connected to the **Otherwise** connector pin.

> NOTE *The default is to wait 20 seconds for an answer before recalling an assisted transfer attempt.*

To specify a call number for the Assisted Transfer element

1. In the **Call number(s)** section, select the telephone button to open the **Enter Phone Number** menu box.

> NOTE *You can also enter a phone number by right-clicking the **Call number(s)** field and selecting **New**.*

2. **Enter** the telephone number to which you want to transfer callers.
3. From the **Prompt** drop-down menu, select one of the following prompt types:

Never	Never prompts the caller to record a name.
Always	Always prompts the caller to record a name.
Unknown caller	Prompts the caller to record a name if there is no match in the contact list.

> NOTE *Use the* value selector *to select a dynamic value for the element. For more information, refer to* *Selecting Values Within Elements Using the Value Selector on page 98**. For information about contact address book synchronization, refer to* *Synchronizing Contacts on page 98**.*

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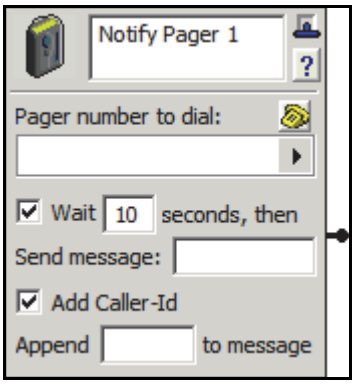
Notify Pager element



The **Notify Pager** element allows you to send a message from the NetVanta UC Server to a specified pager number.

The message sent can be a numeric message with an attached caller ID.

To specify a pager number for the Notify Pager element

1. In the **Pager number to dial** section, do one of the following:
   - Use the value selector to specify a value. For more information, refer to *Selecting Values Within Elements Using the Value Selector on page 98*. For information about contact address book synchronization, refer to *Synchronizing Contacts on page 98*.
   - Select the telephone button and **enter** the pager number that you want
   - Right-click the **Pager number to dial** field, select **New**, and enter the pager number that you want
2. Enable the **Wait** check box if you want to specify a pause before paging, and in the **Wait...seconds then** field, enter the number of seconds that you want the pause to last.
3. In the **Send Message** field, enter a prefix that you want as part of the message, before caller ID is displayed on the pager. Numeric prefixes and suffixes are useful to identify calls that are delivered. The prefix helps you differentiate between callers whose messages you have instructed the NetVanta UC Server to deliver, and other callers to the paging system. For example, you can use a prefix such as **123** or **000** to signal deliveries.
4. Enable the **Add Caller-ID** check box if you want to have caller ID sent with your messages.
5. In the **Append...to message** field, enter information that is part of the messages sent following any caller ID information displayed on your pager.

To specify an account code for the Notify Pager element

1. Select the telephone icon.
2. In the Enter Phone Number box, enable the **Use account code** check box.
3. Type an account code in the text box.
4. Select **OK**.

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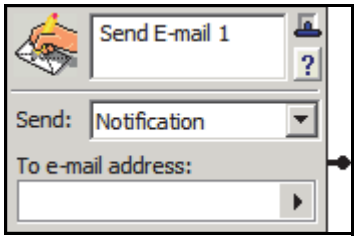
Send Email element



Using the **Send Email** element, you can specify the NetVanta UC Server to notify you, or someone else, by email when a caller moves successfully through the **Send Email** element. For example, you could have an email sent to your personal email address when a caller leaves a voice message for you after hours, or when you receive a fax. You can specify the type of message that you want to send and the address where you want to send it, including multiple email addresses. You can also send attachments with the email notification. For example, you could attach a fax of a property listing, or audio describing a property, or some other type of fax or audio specific to your particular business.

> NOTE *To use the **Send Email** element, ensure that you have a Microsoft Exchange Server or SMTP Server configured.*

Selecting a **Custom** notification allows you to enter or select information that you want to include in the notification. You can combine typed text and selected values in the **Subject** and **Body** sections of the element. In the call flow, the text and values are linked together. From the **Attach** field you can also select attachments to send with the notification, such as announcements, greetings, temporary recordings, faxes, or database values (for example, audio or fax).

Temporary recordings are created using the **Record Announcement** element. Using the **Send Email** element with a temporary recording can be used as a form filling application, such as requesting quotes, or answering general customer service questions, and so on. For more information on temporary recordings, refer to *Allowing Callers to Make Temporary Recordings Within a Service on page 99*.

To specify the NetVanta UC Server to send an email when you receive a voicemail message

1. Select one of the following from the Send drop-down menu:
   - **Entire Message**—sends an email of all the information associated with the voice message that you received, including the voice message (as a .wav attachment)
   - **Notification**—sends only the information associated with the voice message
   - **Short Notification**—sends only some of the information associated with the voice message. This mode is useful for small menu devices, such as cell phones, that are capable of receiving email.
   - **Custom**—allows you to add information that you want to include with the email notification. This includes sending attachments such as announcements, greetings, temporary recordings, faxes, or database values (for example, audio or fax).
   - **Custom With Message**—allows you to send a custom email with the latest mail message

> NOTE ***Custom** notification sends an email notification of calls to a user's mailbox, whether the caller left a message or not. All other types of notifications send email notifications only when a caller leaves a message.*

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2. In the **To email address** field, enter the email address where you want the notification sent. If you want to enter more than one email address, enter them with a semicolon separating each one.

> NOTE
> *Refer to Selecting Values Within Elements Using the Value Selector on page 98 if you want to select a dynamic value for the **To email address** field. You can enter only one dynamic value.*

> NOTE
> *Ensure that you enter a valid email address. The NetVanta UC Server does not authenticate email addresses used with the **Send Email** element.*

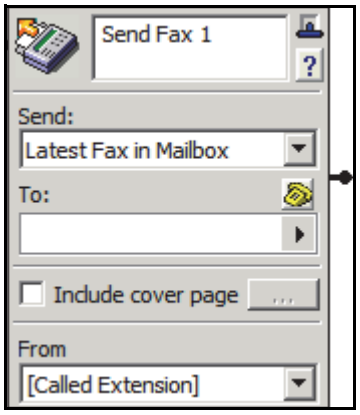
To specify a custom notification

1. From the **Send** drop-down menu, select **Custom**.
2. In the **To email address** field, enter the email address where you want the notification sent. Use a semicolon to separate multiple email addresses.
3. In the **Subject** field, enter a subject for the email, or use the value selector ▶ to select a value.
4. In the **Body** field, enter the body of the email, or use the value selector ▶ to select a value.

> NOTE
> *Refer to Selecting Values Within Elements Using the Value Selector on page 98 to select a dynamic value for the To email address, Subject, Body, or Attach field. You can enter only one dynamic value.*

5. In the **Attach** field, select a database value (audio or fax), fax, announcement, greeting, or temporary recording.

Send Fax element



The **Send Fax** element allows you to send a list of faxes to a specified fax number. .

You can enter the fax number to which you want to send a fax message. A cover page can accompany your fax message and you can select the fax documents to include in the list. You can choose to send a list of faxes, the latest fax in your mailbox, all faxes in your mailbox, or all unread faxes in your mailbox. You do not need to specify the mailbox from which messages are sent. Your system Administrator does this.

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To specify a fax number for the Send Fax element

1. On the **Send Fax** element, select the telephone button.
2. In the **Enter phone number** field, enter the fax number where you want the fax messages sent to.
3. If you want to specify an account code, enable the **Use account code** check box and enter an account code in the field.
4. Select **OK**.

> NOTE
> *Refer to Selecting Values Within Elements Using the Value Selector on page 98 to select a dynamic value for the element. For information about contact address book synchronization, refer to Synchronizing Contacts on page 98.*

To specify a list of faxes for a Send Fax element

1. Select **List of Faxes** from the **Send** drop-down menu.
2. Follow all the steps in *To specify a fax number for the Send Fax element on page 114*.
3. In the **To** field, select the value selector and select the database value or fax that you want to send. The fax appears in the **To** field.
4. Repeat step 3 until all the faxes that you want are added to the **To** field.

To include a cover page for the Send Fax element

1. On the **Send Fax** element, enable the **Include cover page** check box, which opens the Fax Cover Page Details field.
2. Select the browse button to open the **Select Cover Page** field.
3. Select the fax cover page that you want to include.
4. Select **Select**. The name of the fax cover page appears in the Select cover page field.
5. In the **Fax Cover Page Details** field, enter information about the fax recipient, the subject of the fax, and comments that you want to include on the cover page. You can use a combination of typed text and dynamic values.

> NOTE
> *Refer to Selecting Values Within Elements Using the Value Selector on page 98 to select dynamic values for the cover page information.*

6. Select **OK**.

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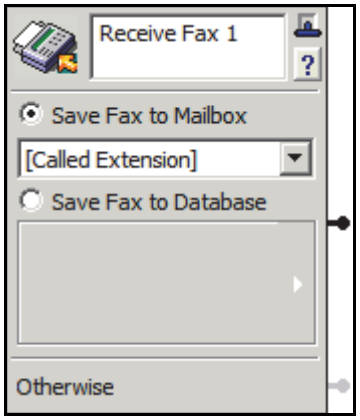
To send faxes in your mailbox using a Send Fax element

1. From the **Send** drop-down menu, select one of the following:
   - **Latest Fax in Mailbox**
   - **All Faxes in Mailbox**
   - **All Unread Faxes in Mailbox**
2. Follow all the steps in *To specify a fax number for the Send Fax element on page 114*.
3. If you want to include a cover page, follow all the steps in *To include a cover page for the Send Fax element on page 114*.
4. From the **From** drop-down menu, select the mailbox from which you want to send the fax. **Called Extension** refers to the identity originally called. **Selected Extension** refers to the identity selected in the last successful **Select Extension** element in the service. If there was none, or the last one failed, it defaults to be the same as the **Called Extension**.

Receive Fax element



The **Receive Fax** element receives incoming faxes and places them into a specified mailbox or database. Use the **Receive Fax** element along with other elements in a service to customize receive fax behavior.

The default behavior for incoming faxes for any PBA users is that the NetVanta UC Server detects the tone that signals a fax, the NetVanta UC Server receives the fax, and then stores it in the user's mailbox. No additional configuration is required, however using the default behavior, no notifications are sent to the user that they have received a fax.

The following table describes the configurable options in the **Receive Fax** element.

Save Fax to Mailbox	Selecting this mode enables you to save incoming faxes to your mailbox.
Called Extension	Saves the fax to the mailbox of the extension number that the caller called.

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Selected Extension	This mode refers to the **Select Extension** element, which is available to admin users only. If an admin user creates a service using the **Select Extension** element, and makes this service available to other users by saving it to the Shared folder, then PBA users will have this mode available. However, PBA users should not select this mode when creating their own service.
Save Fax to Database	Selecting this mode enables you to save incoming faxes to a database, if your system is licensed for database integration. If you have the Database tab available in the NetVanta UC Client Service Editor, then you can use the Data Source Selector to save incoming faxes to a database. For more information, refer to *Using the Data Source Selector on page 159*. **Note**: If the *Save Fax to Database* mode is selected and the database is unavailable, the incoming fax is delivered to the default mailbox.
Otherwise	If a problem occurs receiving a fax, then the call exits through the **Otherwise** connector pin, and the fax is not received in the selected mailbox.

Depending on the configuration, there may be a dedicated fax number or identity to receive faxes. In this case you may want to use the **Receive Fax** element in a service to initiate some behavior, such as storing the fax in a database. Alternatively, you may have a shared voice and fax number or identity, where you receive voice and fax messages on the same identity or extension. If you are using a shared voice and fax number, then you may want to create a **Receive Fax** service, for example, in order to receive notifications that you have received a fax.

> NOTE
> *Your PBA can automatically receive faxes without using a **Receive Fax** element, however you may want to use the **Receive Fax** element in order to customize the receive fax behavior, or to create a service specifically for receiving faxes.*

When the **Receive Fax** element is used in a voice service, it's typically placed after a *Menu Element on page 105*. Callers are instructed using a *Play Announcement element on page 102* that they can press a key on the telephone dialpad to send a fax. For example:

"If you would like to send a fax, please press 5 and then press the Send button on your fax machine."

When the **Receive Fax** element is used in a dedicated fax service it is typically the first element in the service, and it can be combined with other elements to create a custom fax service, such as saving the fax to a database, or receiving notifications of the received fax.

The **Receive Fax** service has additional requirements beyond regular service requirements. If you are using the same identity to receive both voice and fax messages, then you may want to use the **Receive Fax** element to create a specific **Receive Fax** service, for example, to send a notification to a pager, a phone number, or an email address to notify you that you've received a fax. The following is a list of

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requirements for a **Receive Fax** service:

> *Your system administrator may have created a **Receive Fax** service for all users, available in the Services\Shared folder. If a shared **Receive Fax** service is available then you do not need to create your own service, unless you want to create a custom service. If you do not have a shared **Receive Fax** service available, or if you want a custom service, then you can create your own custom **Receive Fax** service.*

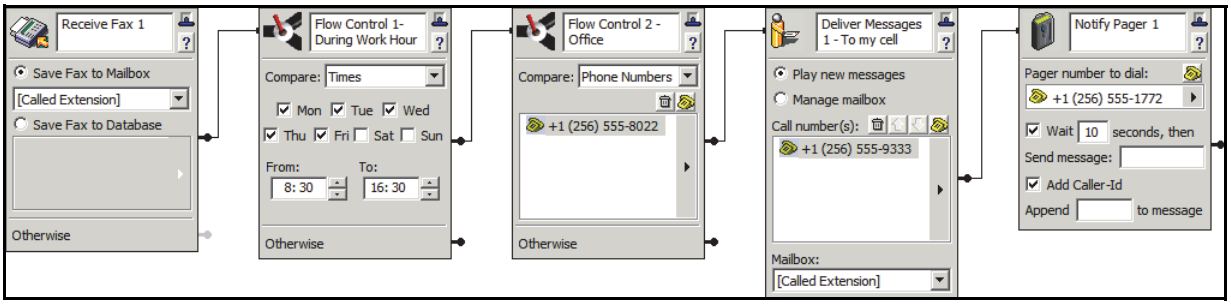
- The **Receive Fax** service must be called “Receive Fax”.
- The **Receive Fax** service must contain a **Receive Fax** element.
- The **Receive Fax** element must appear as soon as possible within the service, typically the first element of the service.
- You do not need to activate the **Receive Fax** service. When a fax call comes in, your active service will be initiated. When the NetVanta UC Server hears the fax tone, it automatically stops the regular active service and activates the **Receive Fax** service.
- The **Receive Fax** service must be saved in one of the following two locations:
  - The shared folder so that it is available to all users in the system (that is, \Services\Shared\Receive Fax)
  - The user's root folder so that it is only available for that user (that is, \Services\Receive Fax)

In order to receive a notification of a received fax you can follow the **Receive Fax** element in a **Receive Fax** service with any or all of the following elements:

- Send Email element
- Deliver Messages element (to send a phone message)
- Notify Pager element

If you want to specify the days of the week or times of day when you want notifications sent, or specify from which phone numbers you want to be notified of a received fax, then use the *Flow Control Element on page 106*.

The following example shows how you might use the **Receive Fax** element in a **Receive Fax** service to notify you during particular days or times, that an incoming fax has been received from a specific fax number. The example below illustrates that when a fax is received during business hours from a specific number, then notifications are sent to the user’s cell phone, pager, and personal email account.



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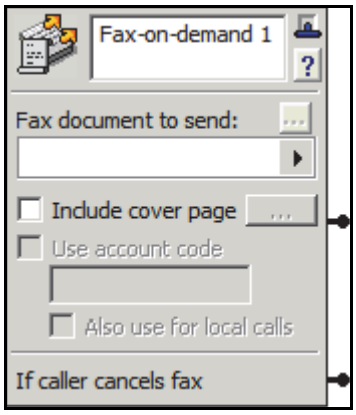
Fax-on-demand element



The **Fax-on-demand** element allows the NetVanta UC Server to send a fax to callers who move through this element. You can select the fax document to be made available and a cover page to accompany the fax.

Some callers might cancel their request. You can add an element to the service to handle such cases and route the call to the next element in the call flow.

To select a fax document for a Fax-on-demand element

On the **Fax-on-demand** element, select the value selector ▸ to select a fax document or dynamic database value. The name and button of the document or value appear in the **Fax document to send** drop-down menu.

> NOTE *To preview a fax document that you selected, select the [...] button in the Fax document to send section. The preview fax button works only with a real fax, not a database reference.*

To select a fax cover page to accompany the fax document for a Fax-on-demand element

1. On the **Fax-on-demand** element, enable the **Include cover page** check box.
2. In the **Fax Cover Page Details** menu box, select the **Browse** button.
3. Select a fax cover page.
4. Select **Select**. The cover page title appears in the **Select cover page file** field of the **Select Cover Page** menu box.
5. In the **Subject** and **Comments** fields, enter information that you want to include on the fax cover page.
6. If you want to include dynamic information in the **Subject** and **Comments** fields, use the value selectors ▸.

> NOTE *You can include both text and value information in the **Subject** and **Comments** fields of the **Fax-on-demand** element.*

7. Select **OK**.

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Using Advanced Elements

Select the **Advanced** tab on the tool palette to view the advanced elements. The following table gives a brief description of each available element.

Change Voice Element on page 129	Changes the voice used by elements in the service's call flow

Record Announcement element on page 29	Allows callers with user accounts to record over an existing announcement from a remote telephone
Take Message element on page 33	Triggers the recording of an incoming message for storage to a mailbox
Advanced Menu element on page 34	Allows callers to make a selection using the telephone keypad
Manage Mailbox element on page 35	Allows callers to retrieve messages remotely
Change Mailbox Password element on page 35	Allows users to change their mailbox password
Verify Password element on page 36	Enables the service to request a password from callers and ensure that a given password matches a specified one or the password for a particular mailbox
Loop Counter element on page 37	Allows you to limit the number of times the call flow executes a path
Text To Speech element on page 37	Reads text to the caller
Gather Digits element on page 38	Keeps track of information that is entered by callers
Compare Data element on page 38	Compares patterns of data and directs the call flow accordingly
Create Log Entry element on page 39	Allows users to capture and export detailed call log entry information

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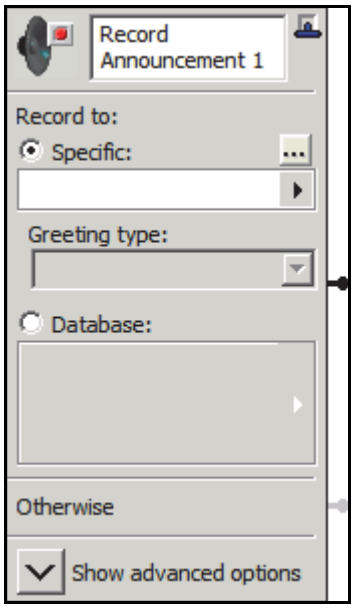
Record Announcement Element



The **Record Announcement** element allows callers to record over an existing announcement or mailbox greeting, record a temporary recording, or record into a database, using a remote telephone.

This element is useful for audio information services that must be updated on a daily basis or at regular intervals. A user can update the recorded information remotely when you include this element in a service.

The **Record Announcement** element sends a voicemail prompt tone to the caller, and then starts to record the caller. You may want to use a **Play Announcement** element before the **Record Announcement** element to instruct the caller on how to stop the recording. The caller must press a telephone key to stop recording.

Action	Key	Description
Stop recording\Plays menu options	4-9, 0, #	Stops recording and prompts the caller with the menu options for 1, 2, 3, and the * key on the telephone keypad. If the caller does not subsequently press a key, then after repeating the menu options three times, the element keeps the current recording and the call flow proceeds. If a caller presses keys 4 to 9 or 0, the prompt menu is repeated the first time, then subsequently has the same effect as if the 1 key was pressed.
Listen to the recording	3	Stops recording, plays the recorded audio to the caller, and then prompts the caller with the menu options.
Record again	2	Stops recording, discards the current recorded audio, sends a voicemail prompt tone to the caller, and allows the caller to start recording again. The caller must press a telephone key to stop the recording.
Keep the recording/cancel	1	Stops recording, keeps the recorded audio, and the call flow proceeds.

Select the Announcement option for use with an audio information service. The caller is prompted to make a recording. Otherwise, you can select a prerecorded announcement for use with this element.

The Greeting for mailbox option allows you to change the specified greeting from a remote location. You do not need to specify the mailbox from which the greeting is played. Your system administrator does this.

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To enable callers to change a specified announcement using a remote telephone

1. Enable the **Specific** button.
2. Select the value selector ▸, select **Announcements,** and select the recording that you want. The name of the announcement appears in the Specific field.

To enable callers to change a specified extension or user greeting using a remote telephone

1. Enable the **Specific** button. Select the value selector ▸, select **Greetings**, and select one of the users or [**Called Extension**]. **Called Extension** refers to the identity originally called. **Selected Extension** refers to the identity selected in the last successful **Select Extension** element in the service. If there was none, or the last one failed, it defaults to be the same as the **Called Extension**. The name of the greeting appears in the **Specific** field.

> NOTE *Only administrator users can add a **Select Extension** element to a service. However, if an administrator user shares such a service with a PBA user, then the **Select Extension** element within that service becomes available to the PBA user.*

2. From the **Greeting** type drop-down menu, select one of the following greeting types:
   - **Internal Greeting**
   - **External Greeting**
   - **Out-of-Office Greeting**
   - **Mailbox Identifier**

> NOTE *Put a **Verify Password** element before this element if you want to prevent unauthorized access.*

You can use the **Record Announcement** element to record audio in a specific temporary recording, and elements like **Play Announcement** can be used to play the audio. Temporary recordings exist only for the duration of the execution of a service. That is, when a service starts, none of the temporary recordings exist. If a caller records a temporary recording, then the recording is stored in a temporary file that can be played by another element, and the recording is discarded when the service ends. Temporary recordings can be referenced by the following elements:

- Play Announcement element
- Menu element
- Send Email element (custom)
- Add Data element
- Update Data element

> NOTE *To use the **Add Data** and **Update Data** elements, the system must be licensed for database integration.*

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For more information on temporary recordings, refer to *Allowing Callers to Make Temporary Recordings Within a Service on page 99*.

To enable callers to create a temporary recording using a remote telephone

1. Enable the **Specific** button.
2. Select the value selector ▸, select **Temporary Recordings**, and select the temporary recording that you want. The name of the temporary recording appears in the Specific field.

Record the announcement to a database by selecting a Data Source and specifying the filtering information.

> **NOTE** *To access database information, the system must be licensed for database integration.*

To enable callers to change an announcement in a database

1. Enable the **Database** button.
2. Select the **Data Source Selector** ▸ arrow. For more information, refer to *Deliver Messages element on page 108*.
3. Specify the **Data Source**, **Filter field**, **Equals**, and **Update** information using the drop-down menus.

The **Advanced Record Announcements** allow you to define additional attributes for the recording. To change the advanced options select on the show or hide advanced options button.

You can limit the length of the message that can be recorded and avoid recording silence. Enable the corresponding check boxes to allow callers to signal the end of their message, enable a beep before recording, and enable review message menu.

To limit the length of a recorded message

Enter a number of seconds in the **Record for at most** field. Callers cannot leave a message that lasts longer than the time limit that you specify.

To avoid recording silence

1. Enable the **Stop recording after** check box.
2. Enter a number of seconds in the field.

> **NOTE** *If you set the number of seconds of silence too low, callers might be cut off while pausing between phrases or speaking quietly.*

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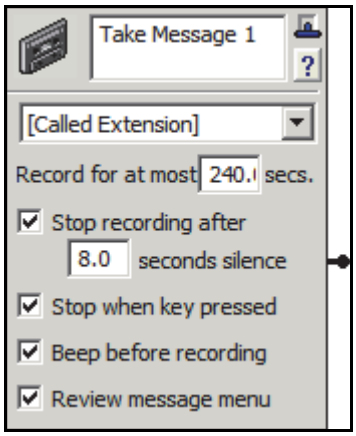
To set Take Message specifications

Enable any of the following check boxes:

- **Stop when key pressed**—callers proceed to the next element after they press a key
- **Beep before recording**
- **Review message menu**

Take Message Element



The **Take Message** element records an incoming message. **Called Extension** refers to the identity originally called. **Selected Extension** refers to the identity selected in the last successful **Select Extension** element in the service. If there was none, or the last one failed, it defaults to be the same as the **Called Extension**. This element can receive voicemail messages and store them in a specific mailbox.

First, select **Called Extension** from the drop-down menu. Make sure to include a **Select Extension** element before the **Take Message** element in the call flow so that callers can enter the extension number that they want. If you do not include a **Select Extension** element in the service, the message goes to the Administrator's mailbox.

This element can receive voicemail messages and store them in your mailbox. You do not need to specify the mailbox where messages are stored. Your system administrator does this.This element can receive voicemail messages and store them in a specific mailbox.

First, select **Called Extension** from the drop-down menu. Make sure to include a **Select Extension** element before the **Take Message** element in the call flow so that callers can enter the extension number that they want. If you do not include a **Select Extension** element in the service, the message goes to the Administrator's mailbox.

You can limit the length of the message that can be recorded and avoid recording silence. Enable the corresponding check boxes to allow callers to signal the end of their message, enable a beep before recording, and enable review message menu.

To limit the length of a recorded message

Enter a number of seconds in the **Record for at most** field. Callers cannot leave a message that lasts longer than the time limit that you specify.

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To avoid recording silence

1. Enable the **Stop recording after** check box.
2. Enter a number of seconds in the field.

> NOTE *If you set the number of seconds of silence too low, callers might be cut off while pausing between phrases or speaking quietly.*

To set Take Message specifications

Enable any of the following check boxes:

- **Stop when key pressed**—callers proceed to the next element after they press a key
- **Beep before recording**
- **Review message menu**

Advanced Menu Element

The **Advanced Menu** element allows callers to make a selection using the telephone keypad. It is advisable to put an audio element (such as **Play Announcement**) that specifies menu options before the **Advanced Menu** element. The **Advanced Menu** element can also be attached to the "on single digit" connection of certain elements.

Some callers might not make a selection from the menu. For this reason, the **No key in** check box is provided. Select the check box and then enter in a number of seconds to wait in the associated field. You can specify the amount of time the NetVanta UC Server waits for a response before it moves to the next element.

To allow callers to move to the next element if they do not select a key

1. Enable the **No key in** check box.
2. In the field, enter the number of seconds to wait.

To set selection keys on a menu

1. In the first **On** drop-down menu, select the number of the key that you want. The number one appears by default. When callers press a key, they are sent to the element that is adjacent to the connector pin, depending on their choice.
2. Select **New** to add an **On** drop-down menu for setting an additional key. The NetVanta UC Server enters the keys in numerical sequence. You can also select a key from the drop-down menu. You can set a maximum of 12 keys. Keys range from one to nine, then include zero, * and #.

When you have finished setting selection keys, you can connect the subsequent element for each selection key that you set, as applicable.

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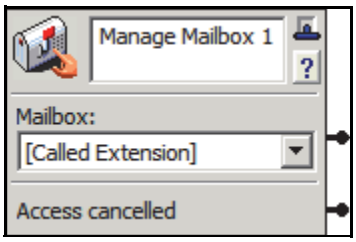
To remove a selection key from a menu

Select the trashcan button to the left of the key that you want to delete.

Manage Mailbox Element



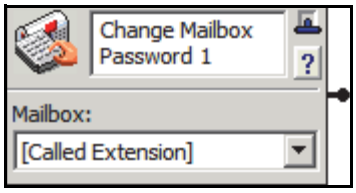
The **Manage Mailbox** element allows callers to retrieve messages remotely over the telephone. **Called Extension** refers to the identity originally called. **Selected Extension** refers to the identity selected in the last successful **Select Extension** element in the service. If there was none, or the last one failed, it defaults to be the same as the **Called Extension**.

You do not need to specify the mailbox where messages are stored. Your system administrator does this.

You can set up the next element in the call flow depending on whether callers enter a valid extension number or cancel the management attempt.

> NOTE *This element prompts callers for a mailbox password before allowing access.*

Change Mailbox Password Element



The element prompts callers for a new password, waits until they enter a new password, and then confirms it by playing it back to callers. Callers must accept the change or reject it.

In the **Mailbox** drop-down menu, select **Called Extension**. Make sure to include a **Select Extension** element before the **Manage Mailbox** element in the call flow so that callers can enter the desired extension number.

The Change Mailbox Password element allows you to change your mailbox password.

The element prompts you for a new password, waits until they enter a new password, and then confirms it by playing it back to you. You are then prompted to accept the change or reject it.

You do not need to specify the mailbox for which you want to change the password. Your system administrator sets this so that you are always dealing with your own mailbox.

Called Extension refers to the identity originally called. **Selected Extension** refers to the identity selected in the last successful **Select Extension** element in the service. If there was none, or the last one failed, it defaults to be the same as the **Called Extension**.

For added security, you might want to put a **Verify Password** element before this element.

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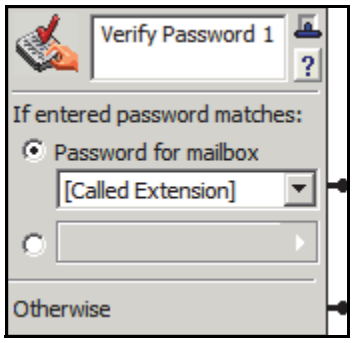
Verify Password Element



The **Verify Password** element enables the service to request a numeric password from a caller, and verifies that a given password matches a specified password, or the password for a particular mailbox. The **Verify Password** element would typically be used to access or to change information based on authentication.

Administrators may use any of the following sources to verify the password provided.

1. The password associated with any of the following mailboxes:
2. A password contained in a Data Source value.

   If you select this mode, then be sure to include a database element (such as the **Fetch Data**, **Dial for Data**, **Move Current Row**, or **Prompt for Current Row** elements) that indexes the Data Source value that you wish to use to verify the password. The database element must occur before the **Verify Password** element in the call flow, so that you can reference it in the **Verify Password** element's Data Source selector.

   Data Sources cannot be referenced directly, so you must reference a filtered Data Source created by one of the database elements referenced above. Ensure that the Data Source value that you use is a Number data type, since only Data Source values that have this type can be selected.

To use your mailbox password, for *Password for mailbox* select [Called Extension], which is the default for this element. Selecting this option automatically selects the password for your own mailbox.

The [Selected Extension] option refers to the Selected Extension element, however this element is only available to Administrators and is not available to users. Therefore, the value of the [Selected Extension] is identical to the value of the [Called Extension].

If you select the Database value option, then be sure to include a database element (such as the Fetch Data, Dial for Data, Move Current Row, or Prompt for Current Row elements) that indexes the Data Source value that you wish to use to verify the password. The database element must occur before the Verify Password element in the call flow, so that you can reference it in the Verify Password element's Data Source selector.

Data Sources cannot be referenced directly, so you must reference a filtered Data Source created by one of the database elements referenced above. Ensure that the Data Source value that you use is a Number data type, since only Data Source values that have this type can be selected.

The **Otherwise** connector pin is followed when:

- The password does not match the selection criteria after three sequential attempts, or
- The caller has not entered any digits after three sequential attempts.

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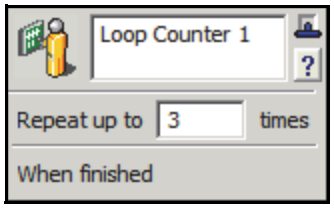
You can set up the next element in the call flow depending on whether a caller enters a valid extension number or cancels the attempt.

Loop Counter Element



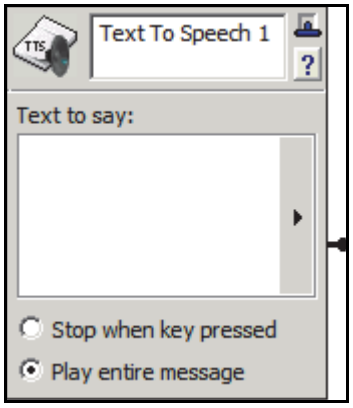
The **Loop Counter** element allows you to limit the number of times the call flow makes a connection. This element affects only call flow control. Callers do not hear anything or perform an action.

In the **Repeat up to** field, enter the number of times you want a connection to be followed.

Once the loop counter is encountered the number of times you have specified, the call follows the **When finished** connection.

All loop counters are reset at the beginning of each call.

Text To Speech Element

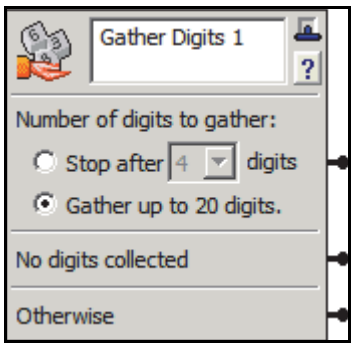


The **Text to Speech** element allows users to convert text to speech. The supplied text is "spoken" to callers by the Text to Speech engine. You can use this element when you prefer not to make audio recordings.

Enter the text manually, or use the value selector ▸ to specify a dynamic value for the text.

For more information, refer to *Selecting values within elements using the value selector on page 238*. You can also use a combination of typed text and selected values.

Gather Digits Element



The **Gather Digits** element allows the caller to enter digits on the telephone keypad that are compared to a **Compare Data** element in the same service. The **Gather Digits** element is typically used with an element that plays audio, such as the **Play Announcement** element, to give the caller instructions. When the NetVanta UC Server has gathered the specified number of digits, the caller moves to the connected element.

If no digits are gathered, the caller moves to the element connected to the **No digits collected** connector pin.

If too few digits are gathered or the time limit for entering digits is exceeded, then the caller moves to the element connected to the **Otherwise** connector pin.

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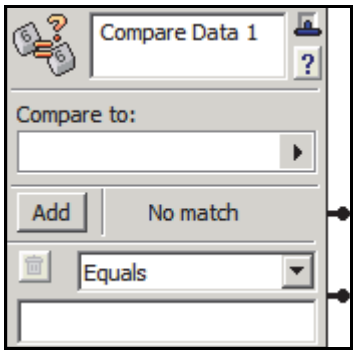
The **Gather Digits** element works with the **Compare Data** element. The **Gather Digits** element must appear in the call flow before the **Compare Data** element but does not need to be connected directly to it. You can include elements between them in the call flow.

To specify the number of digits to gather

1. Enable one of the following:
   - **Stop after**—the number of digits is fixed. It lets you specify the number of digits.
   - **Gather up to 20 digits**—the number of digits is variable, up to 20
2. If you selected the **Stop after** button, then enter the number of digits in the field.

Compare Data Element



The **Compare Data** element compares data that is collected by a **Gather Digits** element, system values (for example, Today's Date), or database values, and directs the call flow accordingly. For example, you might want a caller to enter a four-digit number to continue in the call flow. Once the caller enters the number and it is stored by the **Gather Digits** element, the **Compare Data** element can let you direct a specific caller through the call flow based on that four-digit number.

The **Compare Data** element executes as follows:

- The first comparison value is evaluated for a match against the comparison selected. If the comparison is true, then the call exits through the associated connector. If the comparison is not true, then the next comparison value is evaluated for a match.
- If no match is found when comparing data, then the call proceeds to the element connected to the **No match** connector pin.

Note that if comparisons other than **Equals** are selected, then the order of comparison values is important, and can be used to match between two values. For example, if the **Compare to** value is a numeric value and the following comparisons are used:

- Less Than: 5
- Greater Than: 10
- Less Than/Equal: 10

Then the following results occur:

- If the **Compare to** value is less than 5, then the first connector is taken.
- If the **Compare to** value is greater than 10, then the second connector is taken.
- If the **Compare to** value is between 5 and 10 (including 5 or 10), then the third connector is taken.
- If the **Compare to** value had no value, then the **No match** connector pin is taken.

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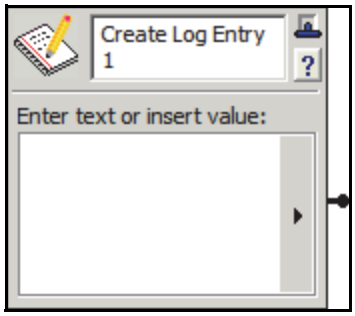
To direct a caller using the Compare Data element

1. From the **Compare to** value selector ▶, select the **Gather Digits** element, System Value, or database reference that you want to compare to.

> NOTE *Refer to Selecting values within elements using the value selector on page 238 if you want to select a dynamic value for the Compare to field.*

2. From the drop-down menu select a comparison mode that you want to associate with a specific caller.
3. Select **Add** to select additional comparison options. You can add up to ten compare data connectors.

Create Log Entry Element



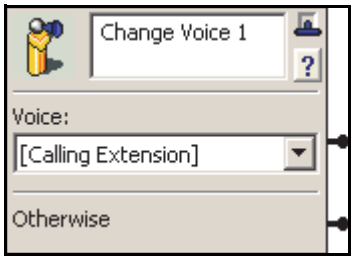
The **Create Log Entry** element allows detailed call information to be exported as a tab separated file or XML-based file. You can specify the type of information that you want to include in the call log entry. Use the **Create Log Entry** element with the **Gather Digits** element if you want to log the digits that a caller enters.

To specify types of information using the Create Log Entry element

1. In the **Enter text or insert value** section, select the value selector ▶. For more information, refer to *Selecting values within elements using the value selector on page 238*.
2. Select dynamic values for the log entry, and enter any text that you want to appear in the log.
3. Repeat steps 1 and 2 until all the information that you want to include appears in the list.

> NOTE *Some of the information types appear blank in the call log, depending on the PBX.*

Change Voice Element



The **Change Voice** element is used to change the voice used by elements in the service's call flow. It can be used when creating a service to change the voice used by other elements in the call flow to a specific voice, the calling party's voice, or the called party's voice. Also, it can be used in conjunction with the **Menu** element to allow a caller to select the voice used by the service.

The **Change Voice** element affects other elements using audio or TTS during service execution. Examples of elements that use audio or TTS

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are the following: **Voicemail**, **Send Email**, **Send Fax**, **Record Announcement**, **Play Announcement**, and **Menu**. Additionally, the **Transfer Call** element is affected by the **Change Voice** element. If the call is transferred to voicemail (the called party did not answer the call), the voicemail greeting is played in the called party's voice.

Voice	Specifies the voice that will be used by elements in the service.
[Calling Extension]	This voice option sets the voice used by the service to the configured voice of the calling party (the initiator of the call). This option enables the **Otherwise** connector pin. If the calling party is a NetVanta UC Server user but does not have a voice configured or if the calling party is not a NetVanta UC Server user, the element will exit through the **Otherwise** connector pin.
[Called Extension]	This voice option sets the voice used by the service to the configured voice of the called party (the receiver of the call).
[Selected Extension]	This voice option sets the voice used by the service to the configured voice of the user whose extension has been previously selected using the **Select Extension** element. If the voice has been changed previously in the service using a Change Voice element, the **[Select Extension]** option could be used to reset the voice of the service to that of the selected extension.
English (U.S.) Female	This voice option sets the voice used by the service to **English (U.S.) Female**. This option is listed only if the voice is enabled by the administrator.
English (U.S.) Male	This voice option sets the voice used by the service to **English (U.S.) Male**. This option is listed only if the voice is enabled by the administrator.
French (Canada) Female	This voice option sets the voice used by the service to **French (Canada) Female**. This option is listed only if the voice is enabled by the administrator.
[System Default Voice]	This voice option sets the voice used by the service to the currently configured default system voice.
Otherwise	This option is only available if the **Voice** option selected is **[Calling Extension]**. If the calling party is a NetVanta UC Server user but does not have a voice configured or if the calling party is not a NetVanta UC Server user, the element will exit through the **Otherwise** connector pin.

The example below shows a service that plays an announcement in the language chosen by the caller. The service will first attempt to use the caller's configured voice to play the message. If the caller's voice is available the message will play in the caller's configured voice. If the caller's voice is not available or the caller is not a NetVanta UC Server user, the service will prompt the caller to select a voice. The

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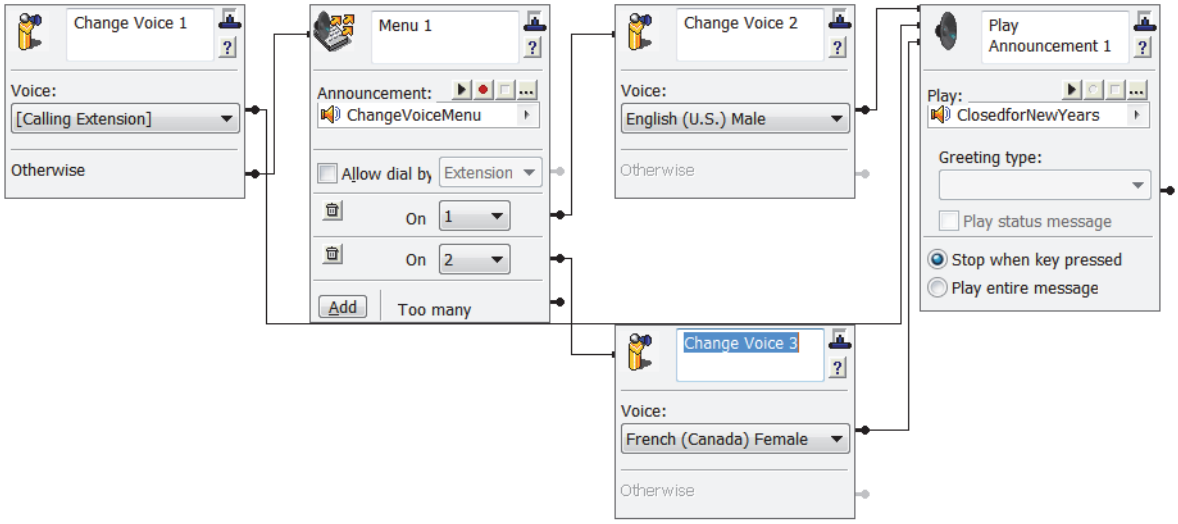
announcement will then be played in the voice that the caller selected.



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10. Using Announcements in Call Answering Services

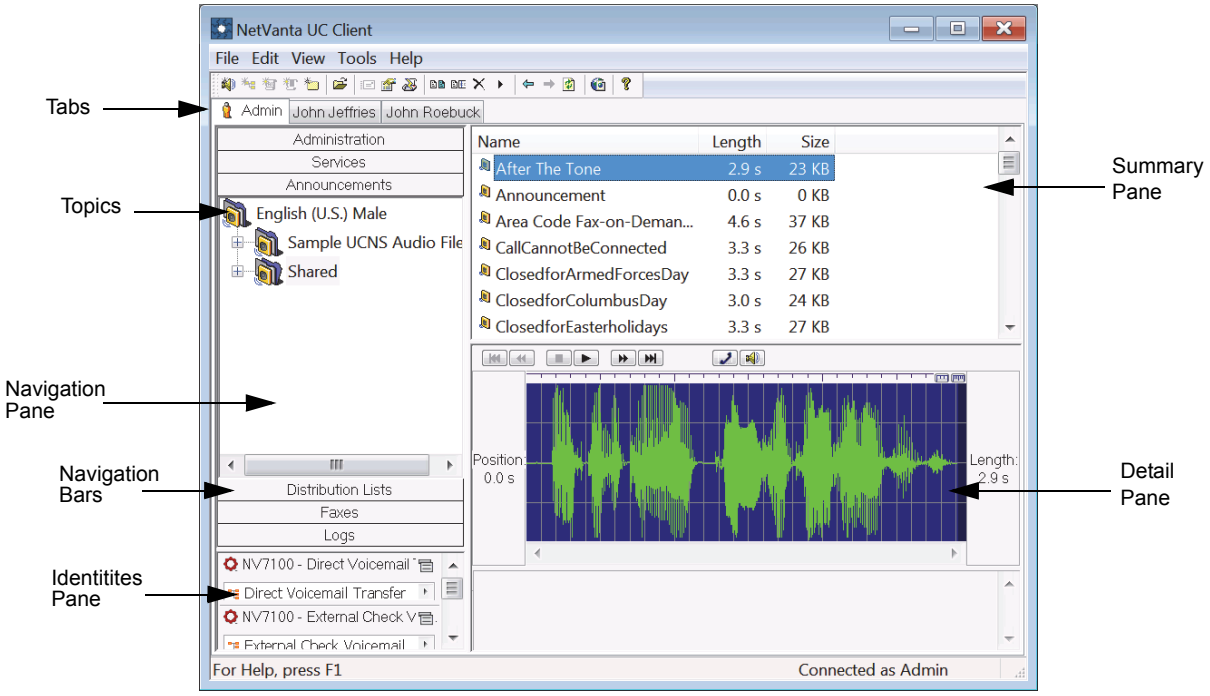
Announcements are the outgoing messages that callers hear when using your extension. These announcements typically initiate the call flow in a service and are used to guide the caller through the call process. Announcements can inform callers of your business hours, explain menu options, or provide instructions about how to leave messages or request information by fax.

This chapter provides information about how to select prerecorded announcements for your extension It also explains how to record personalized announcements using the Audio Editor. In order for announcements to function in call answering services, a sound card must be installed on the NetVanta UC Server computer. This chapter covers the following topics:

- *Using Prerecorded Announcements on page 133*
- *Recording Announcements on page 137*
- *Managing Announcements on page 145*

Using Prerecorded Announcements

The **Announcements** navigation pane presents folders used to store announcements. Select a folder to view its contents in the summary pane. Select an announcement to view its waveform representation in the detail pane. A variety of convenient, prerecorded announcements are available. You can also create custom announcements using the Audio Editor. For more information on using the Audio Editor, refer to *Recording Announcements on page 137*.



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Versions of prerecorded announcements in each system voice are supplied with the application. They are displayed in the English (U.S.) Male, English (U.S.) Female, and French (CA) Female folders in the **Announcements** navigation pane. These voice folders are displayed one at a time in the **Announcements** navigation pane. To access the available voice folders, refer to *Changing the Voice Folder in the Announcements Navigation Pane on page 134*.

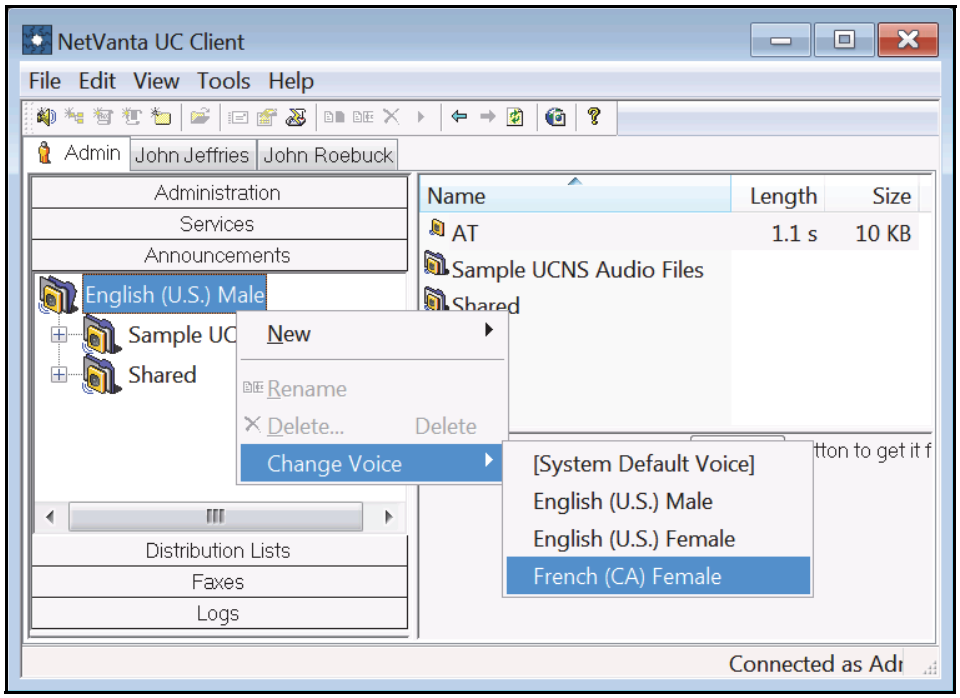
> NOTE
> *For information about sharing prerecorded announcements, refer to Importing and Exporting on page 173.*

Changing the Voice Folder in the Announcements Navigation Pane

To change the voice folder displayed in the **Announcements** navigation pane, follow these steps:

> NOTE
> *The **Change Voices** drop-down menu is available only to administrators while in the administration tab. The voice of the announcements available to PBA users is limited to the voice selected in the **General** tab of the **Options** menu.*

1. Select the **Announcements** navigation bar to open the **Announcements** navigation pane.
2. Right-click the topmost folder (for example, **English (U.S.) Male**) and select **Change Voice** from the drop-down menu. Then, select the voice folder you would like to display from the submenu.



Previewing a Prerecorded Announcement

Some of the elements that are used to build services include a **Browse** button that allows you to select an

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announcement to be played at that particular point in the call flow. Before selecting the announcements you want to play while the service runs, you can preview them in the Announcements menu. To preview a prerecorded announcement, follow these steps:

1. Select the **Announcements** navigation bar to open the **Announcements** navigation pane.
2. If the appropriate voice folder is not displayed in the **Announcements** navigation pane, select the desired voice folder using the steps in *Changing the Voice Folder in the Announcements Navigation Pane on page 134*.
3. From the voice folder, select a subfolder to list its contents in the summary pane.
4. In the summary pane, select the announcement that you want to preview.
5. Select **Download** in the detail pane. A waveform representation of the announcement appears in the detail pane with a set of audio commands above the waveform.
6. Select the icon of the device that you want to use (either or).

   The icon that you select is enclosed by a dotted line.
7. Select to listen to the announcement.

> NOTE
> *You can also preview announcements using the Service Editor while you are building a service. You must first select a Play Announcement element and then use the **Browse** button to choose an announcement to preview. For more information on using the Service Editor, refer to Using the Service Editor on page 90.*

Selecting a Prerecorded Announcement for an Element

After you preview the announcements and decide which you want to use, open the service to which you want to add prerecorded announcements. Locate an element that you want to change, or add one to the service. To select a prerecorded announcement for an element, follow these steps:

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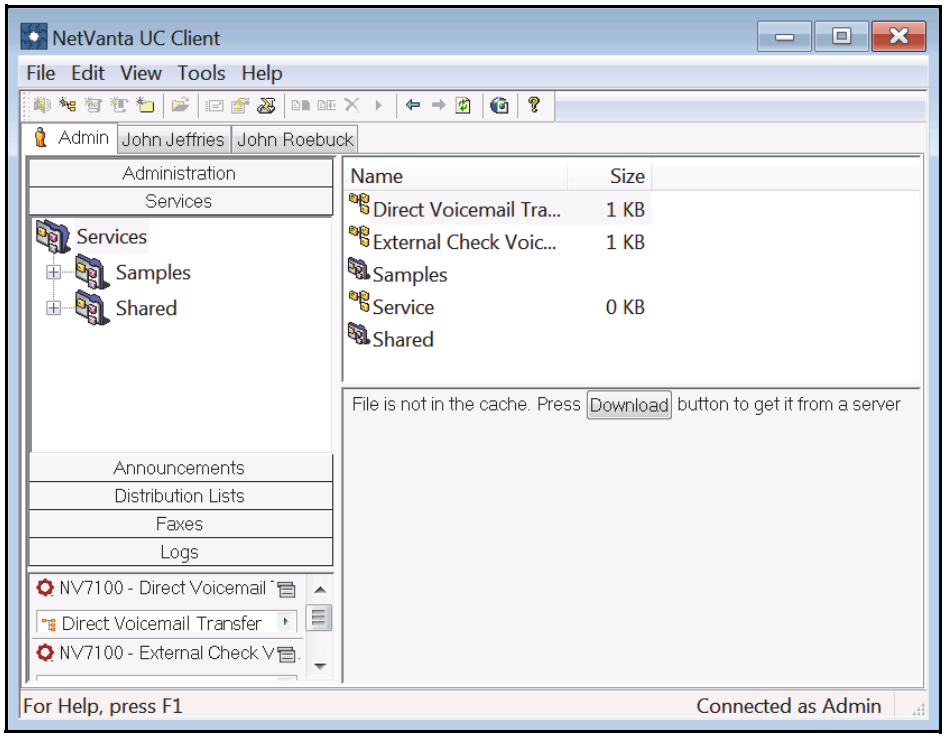
1. Select the **Services** navigation bar to open the **Services** navigation pane.



2. Double-click a service to open it and start the **Service Editor**.

3. Select a **Play Announcement** element and then drag it to the canvas.

Play Announcement element

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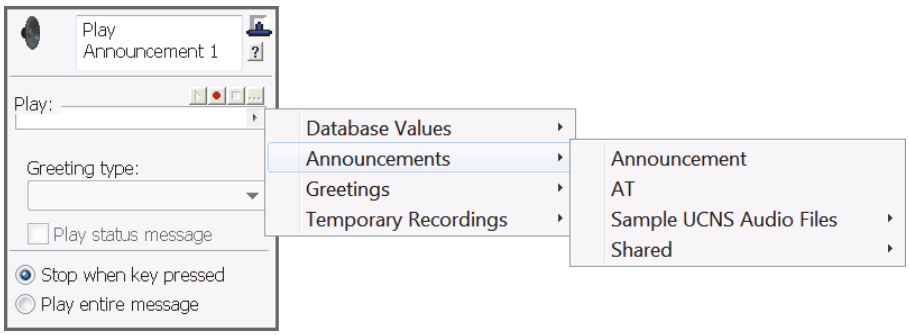
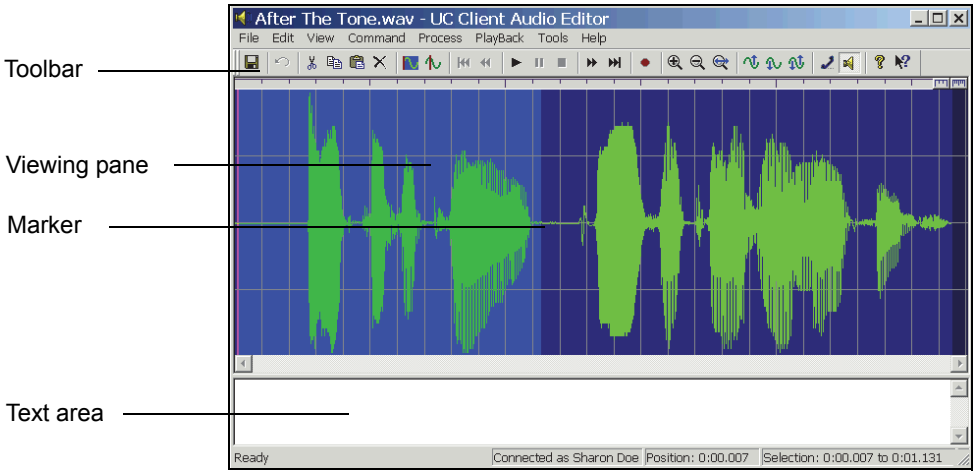
4. Select the arrow next to the **Play** field and select **Announcements** from the submenu to browse the available announcements folders.



5. Select the announcement you would like to use.

Recording Announcements

You can create custom announcements to be played on call answering services. These announcements can also be copied, renamed, or deleted according to your needs. Custom announcements are created using the Audio Editor, shown below:



The Audio Editor has a Viewing pane and a Text area.

The **Viewing pane** contains a waveform representation of your announcement. As you play an announcement using the audio commands, the vertical announcement **Marker** moves across the viewing pane from left to right so you can identify the exact location of different parts of your recording. You can edit any part of your announcement by manipulating the waveform and using the commands located in the toolbar. You can also remove parts of the message that are no longer required.

The **Text area** allows you to type a script for your announcement before recording it. You can read the script from the menu while recording to help you eliminate pauses in your announcement.

The **Toolbar** contains visual shortcuts to the most frequently used menu items. Hold the pointer over a

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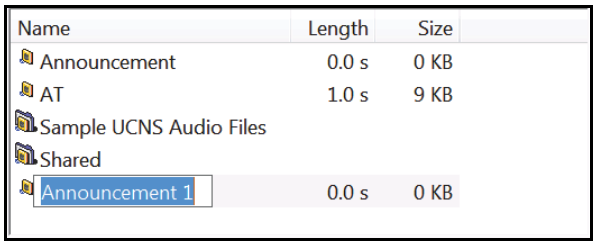
button to show the tool tips. The toolbar contains **View**, **Select**, and **Process** commands, as well as standard **Audio** commands found on most applications.

Creating Announcements

You can record a new or specialized announcement for a service. You can include company information, office hours, a list of people for whom to leave messages, and the option of how to receive company literature by fax. To create an announcement, follow these steps:

1. Select the **Announcements** navigation bar to open the **Announcements** navigation pane.
2. If the appropriate voice folder is not displayed in the Announcements navigation pane, select the desired voice folder using the steps in *Changing the Voice Folder in the Announcements Navigation Pane on page 134*.
3. Select the folder where you want to store your new announcement. The folder's contents are listed in the summary pane.
4. Right-click anywhere in the **Announcements** summary pane.
5. Select **New > Announcement**. A new announcement is added to the list in the summary pane. The announcement icon denotes the new announcement.
6. Directly after adding the new announcement, the announcement's default name will be highlighted in the summary pane and will be bound by an edit box. Enter a new name for the announcement.



7. Double-click the announcement that you want to record. The **Audio Editor** appears.

> **NOTE** *In the text area of the Audio Editor, you can enter the text to use as a script for the announcement that you want to record. This is useful for eliminating pauses when you are recording.*

8. On the toolbar, select to open the **Record Audio** menu.
9. Make sure that the audio device you want is selected.

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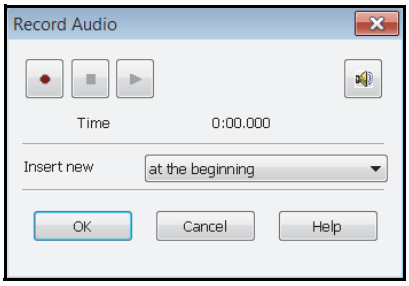
10. Using the **Insert new** drop-down menu, select **at the beginning**.



11. Select to begin recording your message. If you are using your telephone, wait for the beep before you begin to record. As you record, the **Time** will increment and the red record button turns grey.

> NOTE *The maximum length of a recorded announcement is 15 minutes.*

12. When you are finished recording, select .
13. Select **OK** to keep the announcement.
14. In the menu bar of the **Audio Editor**, select **File > Update** to save the update to the announcement.

Changing Announcements

You can change an announcement by deleting a part that you no longer need, adding recorded audio to it, or adjusting the volume. You can delete portions of the waveform by selecting a portion in much the same way as you select text using a word processor. A number of commands allow you to change announcements. The following illustrations provide details about the command icons located on the Audio Editor toolbar.

Use the edit commands to cut, copy, paste, and erase sections of the waveform. These commands operate in a fashion analogous to the same commands found in a word processor.

Use the audio commands to play announcements, position the marker in the waveform, and make recordings.

Before you delete part of an announcement or add to it, you can listen to it and identify the location on the waveform where you want to make a deletion or insertion. If you have selected a part of the waveform, audio commands apply only to the selected portion. The **move** and **skip** commands are used to position the marker within the selection.

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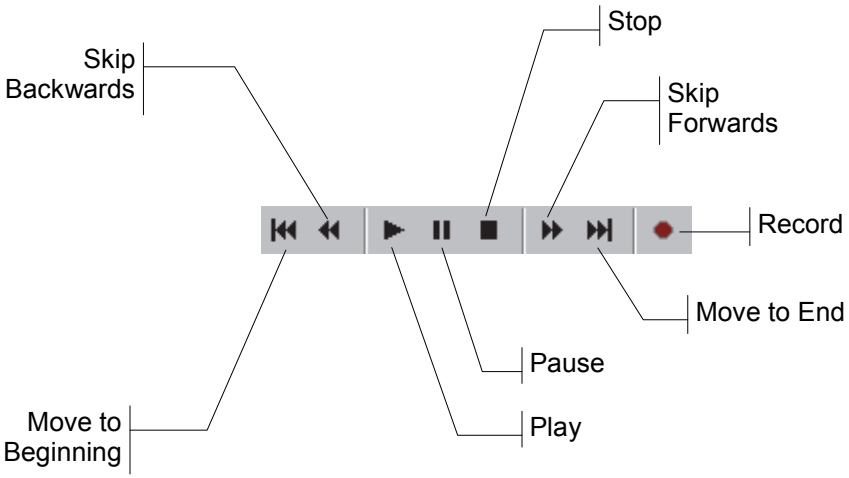
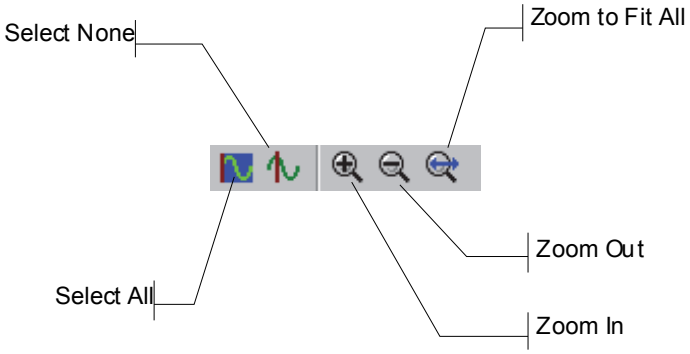


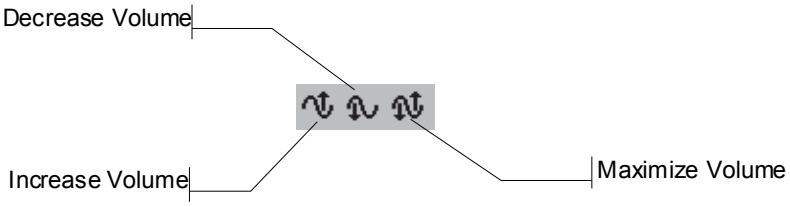
Use the **view** and **select** commands to select a portion of the audio.



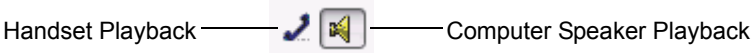
The **view** commands allow you to zoom in and out when you view the waveform so that your selection is as accurate as possible.

The **select** commands allow you to select and deselect the entire waveform. If you do not select a section of the waveform, the changes that you make apply to the whole waveform.

Use the process commands to adjust the volume of the waveform.



Use the playback commands to specify the playback device to use when playing the announcement within the Audio Editor.



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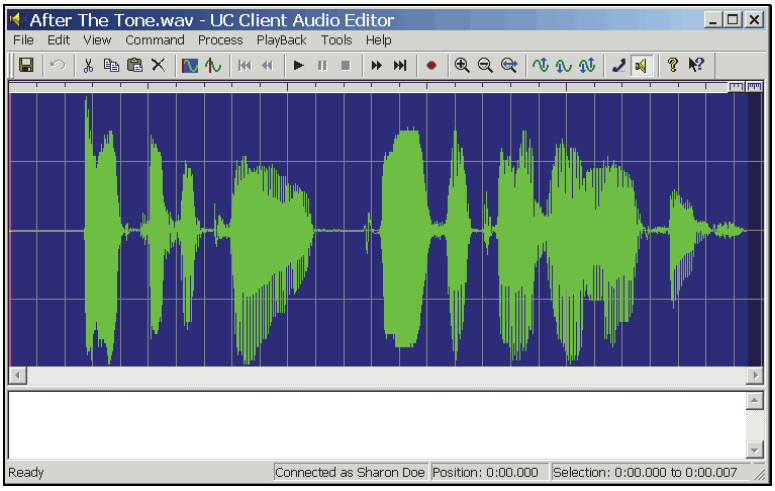
To select part of the waveform

1. Left-click anywhere in the waveform.
2. While still holding down the mouse button, drag across the portion of the audio that you want to select.

> **NOTE** *Deselect the waveform by clicking anywhere in the waveform.*

To delete part of an announcement

1. Select the **Announcements** navigation bar to open the **Announcements** navigation pane.
2. If the appropriate voice folder is not displayed in the Announcements navigation pane, select the desired voice folder using the steps in *Changing the Voice Folder in the Announcements Navigation Pane on page 134*.
3. In the **Announcements** summary pane, double-click the announcement that contains the part you want to delete. The Audio Editor displays the announcement as a waveform.



4. From the menu bar, select **View > Zoom to Fit All**.
5. From the toolbar, select .
6. Use the toolbar to select the desired playback device.
7. On the toolbar, select . Listen to the announcement once or twice to pinpoint the portion of the waveform you want to delete.
8. Select on the toolbar to stop playback at the point before the part you want to delete. Note the marker's position in the **Position** indicator at the bottom of the menu.

Position Indicator

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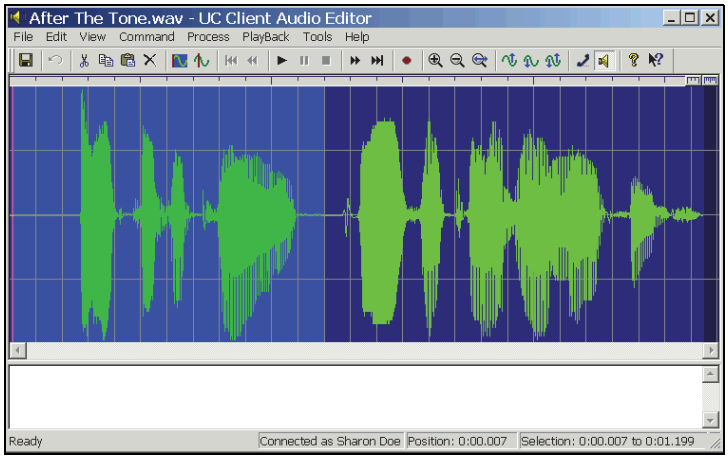
9. Select the point in the waveform where you want to begin deleting and drag to the position you determined in Step 7. This will select the portion of the announcement that you want to delete.



If you do not select part of the waveform, the changes that you make affect the entire waveform.

10. Select ▶ to review the selected portion of the announcement.

> **NOTE** *After you select part of an announcement, the audio commands apply only to the selected part.*

11. Select ✕ on the toolbar of the Audio Editor to delete the selection.
12. From the menu bar, select **File > Update** to save the update to the announcement.

To add to an announcement

1. Select the **Announcements** navigation bar to open the **Announcements** navigation pane.
2. If the appropriate voice folder is not displayed in the Announcements navigation pane, select the desired voice folder using the steps in *Changing the Voice Folder in the Announcements Navigation Pane on page 134*.

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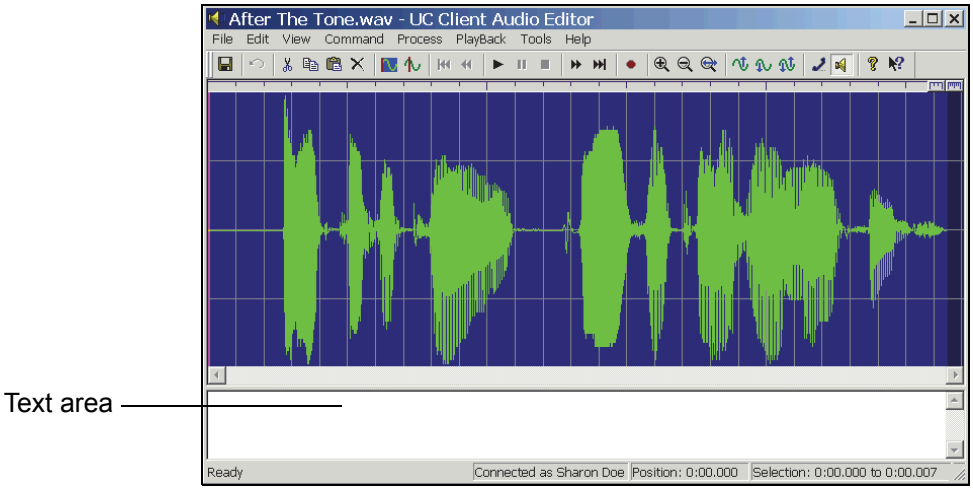
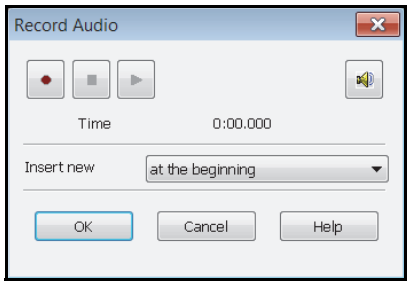
3. In the **Aunnouncements** summary pane, double-click the announcement to which you want to add. The Audio Editor displays the announcement as a waveform.



> **NOTE** *In the text area of the Audio Editor, you can enter a script of the additional text that you want to add to your recording. This is useful for eliminating pauses when you are recording.*

4. From the menu bar, select **View > Zoom to Fit All**.
5. From the toolbar, select the icon.
6. From the toolber, select the audio playback mode that you want to use.
7. On the toolbar, select to play the announcement. Listen to it once or twice to pinpoint the portion of the waveform to which you want to add. Position the cursor over the stop command on the toolbar so you can stop the playback immediately before the part to which you want to add. Use the view commands on the toolbar to zoom in or out to increase or decrease accuracy. Note the marker's position in the **Position** indicator at the bottom of the menu.
8. Select the stop icon on the toolbar to stop playback on the waveform at the point where you want to add to the announcement.
9. On the toolbar, select to open the **Record Audio** menu.



10. In the **Record Audio** menu, select .
11. Make sure that the audio device you want is selected.

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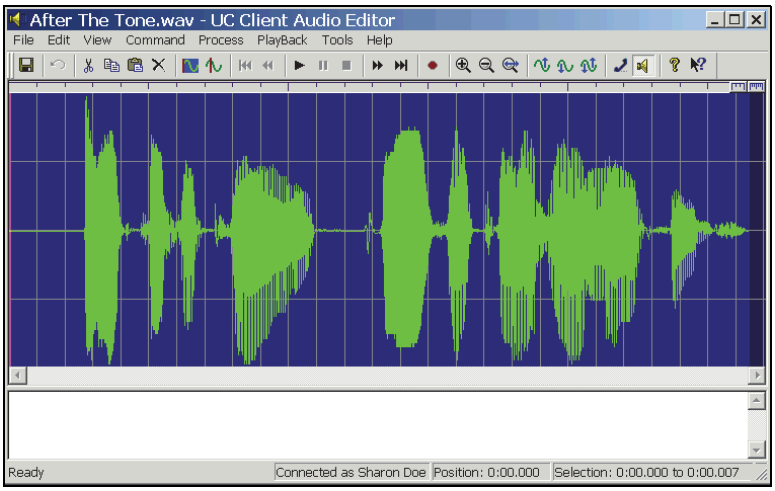
12. Using the **Insert new** drop-down menu, select **at the current position**.
13. Select ● and then record your message. If you are using your telephone, wait for the beep before you begin to record. As you record, the clock increments and the red record button turns grey.

> NOTE *The maximum length of a recorded announcement is 15 minutes.*

14. Select the stop button when you are finished.
15. Select ▶ to review the announcement.
16. Select **OK** to keep the announcement.
17. From the menu bar of the **Audio Editor**, select **File > Update** to save the update to the announcement.

To change the volume of a recording

1. Select the **Announcements** navigation bar to open the **Announcements** navigation pane.
2. If the appropriate voice folder is not displayed in the **Announcements** navigation pane, select the desired voice folder using the steps in *Changing the Voice Folder in the Announcements Navigation Pane on page 134*.
3. In the **Announcements** summary pane, double-click the announcement that you want to change. The Audio Editor displays the announcement as a waveform.



4. From the menu bar, select **Edit > Select All**.
5. On the toolbar, select one of the following process commands:
   - **Increase Volume**
   - **Decrease Volume**
   - **Maximize Volume**

   It is advisable to maximize the volume to make sure that your recording is audible to callers.

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6. If you select **Increase Volume** or **Decrease Volume**, enter the percentage you want to increase or decrease the volume of the announcement, and then select **OK**.
7. Select ▶ to review the changes.
8. From the menu bar, select **File > Update** to save the update to the announcement.

Managing Announcements

You can keep track of your announcements more efficiently by organizing them in folders. You can also duplicate announcements, duplicate announcements in another voice, and rename and delete announcements.

To create a folder for announcements

1. Select the **Announcements** navigation bar to open the **Announcements** navigation pane.
2. If the appropriate voice folder is not displayed in the Announcements navigation pane, select the desired voice folder using the steps in *Changing the Voice Folder in the Announcements Navigation Pane on page 134*.
3. Right-click anywhere in the **Announcements** summary pane, and select **New > Folder**. A new folder is added to the list in the summary pane.

Announcements Folder

4. Enter a name for the folder.

To put an announcement in a folder

In the summary pane, select the announcement that you want to store and drag it to the appropriate folder.

> NOTE *Double-click a folder to view its contents. On the toolbar, use the Go back arrow ⇦ to return to the list previously displayed in the summary pane.*

To duplicate an announcement

1. Select the **Announcements** navigation bar to open the **Announcements** navigation pane.
2. If the appropriate voice folder is not displayed in the Announcements navigation pane, select the desired voice folder using the steps in *Changing the Voice Folder in the Announcements Navigation Pane on page 134*.
3. In the **Announcements** summary pane, right-click the announcement that you want to duplicate.
4. Select **Duplicate**. A copy of the announcement will appear in the summary pane.

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To duplicate an announcement in another voice

To streamline the process of creating multiple versions of the same announcement in different languages (one corresponding to each voice configured on the system), NetVanta UC Server allows you to duplicate announcement objects from an announcement directory of the voice currently being managed to the corresponding directory of another voice. For example, after creating and recording a new announcement in the **English (U.S.) Male/Shared** folder, you can use **Duplicate in other Voice** to duplicate the recorded file into the **English (U.S.) Female/Shared** folder. You can then record over this file with the announcement in the appropriate language. To duplicate an announcement in another voice, follow theses steps:

1. Select the **Announcements** navigation bar to open the **Announcements** navigation pane.
2. If the appropriate voice folder is not displayed in the Announcements navigation pane, select the desired voice folder using the steps in *Changing the Voice Folder in the Announcements Navigation Pane on page 134*.
3. In the **Announcements** summary pane, right-click the announcement you would like to duplicate in another voice, or select multiple announcements and right-click one of the selected announcements.
4. Select **Duplicate in other Voice**, and use the submenu to select the voice in which you would like the selected announcement(s) to be duplicated.
5. The announcements will be duplicated in the corresponding announcement folder in the selected language.

> NOTE
> *If the announcement already exists in the corresponding folder of the selected voice, you will be presented with an error message, and the duplication will fail. In cases where multiple files are selected, after selecting **OK** on the error message, NetVanta UC Server will attempt to duplicate the remaining files.*

To delete an announcement

1. Select the **Announcements** navigation bar to open the **Announcements** navigation pane.
2. If the appropriate voice folder is not displayed in the Announcements navigation pane, select the desired voice folder using the steps in *Changing the Voice Folder in the Announcements Navigation Pane on page 134*.
3. In the **Announcements** summary pane, right-click the announcement that you want to delete.
4. Select **Delete**.
5. Select **Yes** to confirm the deletion.

To rename an announcement

1. Select the announcements folder that contains the recording that you want to rename. The announcements stored in the folder are listed in the summary pane.
2. Right-click the announcement that you want to rename.
3. Select **Rename**. Enter a new name for the announcement and then select its icon to make the change.

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11. Using Databases in Call Answering Services

This chapter introduces User Data Sources and how to manage them, how to use access database information using database elements in call answering services, and includes the following topics:

- *Overview on page 147*
- *Managing Data Sources on page 148*
- *Accessing Data using Database Service Elements on page 159*
- *Using Database Elements on page 163*

> **NOTE** *To access database information the system must be licensed for database integration. If you are not licensed for database integration then the Database tab of elements is not visible.*

Overview

You can use the NetVanta UC Server to access dynamic database information using services. A user with access to the Administrator tab can create user data tables. Each user has a copy of the table where they can save their personal data. All the user data tables that are used in your active services are displayed in the Assistant pane.

For information about creating user data tables, refer to *Managing Data Sources on page 148*the Managing Data Sources section of the ADTRAN NetVanta UC Server *Administrator Manual*.

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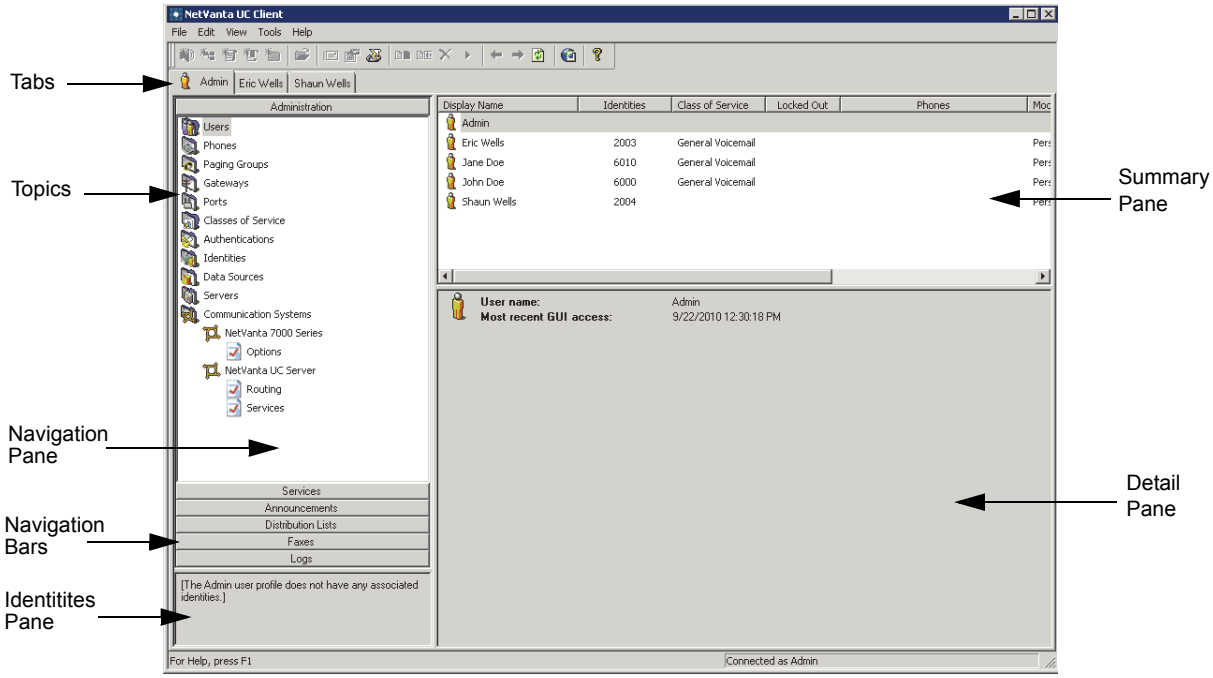
Managing Data Sources

Data sources are set up like tables. Each table row corresponds to a data row or record. Each table column



corresponds to a field (for example, a name, address, or fax).

There are two types of data sources:

- **User Data Sources**—the data is managed by the NetVanta UC Server, and users have their own copy of the data.
- **External Data Sources**—the data is managed by another server or process (for example, a relational database management system), and is shared by NetVanta UC Server users and others. External data is accessed using Microsoft's ODBC (Open Database Connectivity), so these sources are typically called ODBC database sources.

Using the Administrator menu, you can manage the following aspects of data sources:

- Defining ODBC data sources
- Defining user data sources
- Managing data in user data tables

When you define ODBC data sources, the definition includes table and field information. It also includes security information, which allows you to define a user name and password to access the database.

User data tables allow a user to manage personal data without setting up an entire database. After the Administrator creates data tables, users can manage them by adding, changing, and deleting the rows within the tables.

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A set of elements allows users to access information in data sources while defining a service. These elements allow users to retrieve data, manage data sources, and select from sets of values. Most elements allow users to use information retrieved from data sources.

Defining ODBC data sources

To use an ODBC data source, you must define an ODBC Data Source Name (DSN) that uses the related driver. The DSN name, user ID, and password must be configured to connect to the source.

After defining a DSN, you can use the Data Source Editor to define ODBC (Open Database Connectivity) data sources. ODBC data sources include relational databases and other kinds of data, for example, Excel spreadsheets, SQL server, or Visual FoxPro database.

You can edit the field attributes of an ODBC data source. For example, you can change the name of the field, the data type, or whether you want the field to be visible to the user. Other options include filtering and sorting ODBC data.

To name a new ODBC data source

1. Right-click anywhere in the Data Sources content pane.
2. Select **New > ODBC Source**.
3. In the **Name** box, type a name for the data source that you want to define.
4. If you do not want to further define the data source, you can select **OK** to save it.

To change the access status of a data source

1. In the Data Sources content pane, right-click the data source that you want to change the access status of.
2. Select **Access**.
3. Select one of the following access types:
   - **Disabled**—does not allow access to the data source
   - **Admin Only**—allows only the Administrator to access the data source
   - **Everyone**—allows everyone to access the data source
4. If you selected Everyone, select **Yes** to confirm.

To define ODBC connection parameters

1. In the Data Sources content pane, double-click the ODBC source that you want to define.
2. Select the data source that you want from the ODBC DSN list.
3. In the **User ID** box, type the user ID required to access the ODBC data source.
4. In the **Password** box, type the password to access the ODBC data, if required. Some ODBC DSNs contain the user ID and password so you do not have to enter that information.
5. Select the **Connect** button to connect to the ODBC data source.

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To define advanced ODBC connection options

1. In the Data Sources content pane, double-click the ODBC source that you want to define.
2. Select the **Advanced Connection Options...** button.
3. From the **Timeout** list, select the number of seconds that you want ODBC to wait for a connection and successful login. The default timeout is 15 seconds.
4. In the **Maximum rows to fetch** box, type the number of rows that you want the application to fetch during a query. The default number of rows is 200.
5. Type the **Extra Drive Specific Attributes To Be Added To The DSN** in the box, if required.
6. Select **OK**.

To define ODBC tables and fields

1. In the Data Sources content pane, double-click the ODBC source that you want to define.
2. From the **Table** list, select the table that you want to associate with the data source.
3. From the **Available Fields** list, select the fields that you want to include.
4. Select the **Select>>** button to include the selected fields.
5. Repeat steps 4 and 5 until all the fields that you want are included.
6. Select OK.

To change ODBC field attributes

1. In the Data Sources content pane, double-click the ODBC source that you want.
2. From the **Table** list, select the table that contains the fields that you want to change.
3. In the **Included Fields** list, select the value for the field attribute that you want to change.
4. In the new window, type the change.
5. Select outside the window to close it.
6. Select **OK** to save the changes.

A Fetch Data or Dial for Data element can retrieve more than one row depending on the number of rows in the source, and your filter conditions. When one or more rows are fetched, a reference to a field by another element is always a reference to the field's value in the "current" row, in the set of rows fetched. The Move Current Row and Prompt for Current Row elements can be used to change which row is current. Immediately after a Fetch Data or Dial for Data element is executed, the current row is the first row.

- When only one row is fetched, the first row is the single row that was fetched.
- When multiple rows are fetched, which row is first depends on whether you defined a sort in the data source definition.

Defining a sort order

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If you define a sort order in a data source, this defines the default order of rows fetched by a Fetch Data or Dial for Data element. However, a Fetch Data element can override this order.

When an ODBC data source has a defined sort order, the sorting is done by the ODBC server itself, and not by the NetVanta UC Server. In most cases this distinction is unimportant, however some data types supported by the NetVanta UC Server are not directly supported by ODBC. Thus in some cases, the sort order produced by the ODBC server is not the same as what would have been produced by the NetVanta UC Server.

- If no sort order was defined, then the order of the rows is determined by the data source, and you should not make any assumptions about the order.
- With a defined sort order, the first row is the first row in the sort order specified. However, if the sort field contains duplicate values, the order of rows with the same sort value is determined by the ODBC server and not by the NetVanta UC Server, and you should not make any assumptions about the order.

For example, assume that you have a data source with a Date field, and that each row in the data source has a unique date value. If the data source defines a sort order based on this Date field and descending order, then any Fetch Data element that fetches from the data source will retrieve rows in descending date order. In this case, the sort order produced by ODBC is the same as the sort order defined by the NetVanta UC Server data type. If a Fetch Data element fetches multiple rows, then the first row will be the row in the fetched set of rows with the newest value in the Date field. Thus another element referencing this Fetch Data element would always reference the newest row. Without the sort, you cannot predict which row in the retrieved set would be first.

In another example, a data source containing a field defined to be a character string is defined as Day of Week in the ODBC data source. A sort order would return the values by character comparison, resulting in the following order: Friday, Monday, Saturday, Sunday, Thursday, Tuesday, and Wednesday. Day of Week in the NetVanta UC Server would return the results in the following order: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday and Saturday.

Thus, the actual sort order, as produced by ODBC, is not the same as the order that you would get from sorting using the NetVanta UC Server data type.

Defining a sort order using the NetVanta UC Server

You can specify that the NetVanta UC Server sorts the rows fetched by the Fetch Data or Dial for Data elements, by specifying a sort order in a second Fetch Data element. Sorting using an explicit sort defined in a Fetch Data element is always done by the NetVanta UC Server.

To define ODBC filtering and sorting

1. In the Data Sources content pane, double-click the ODBC source that you want to define.
2. From the **Filter Field** list, select the field that you want to test.
3. In the **Filter Value** box, type the value that you want to compare to.
4. From the **Sort Field** list, select the field that you want to sort.

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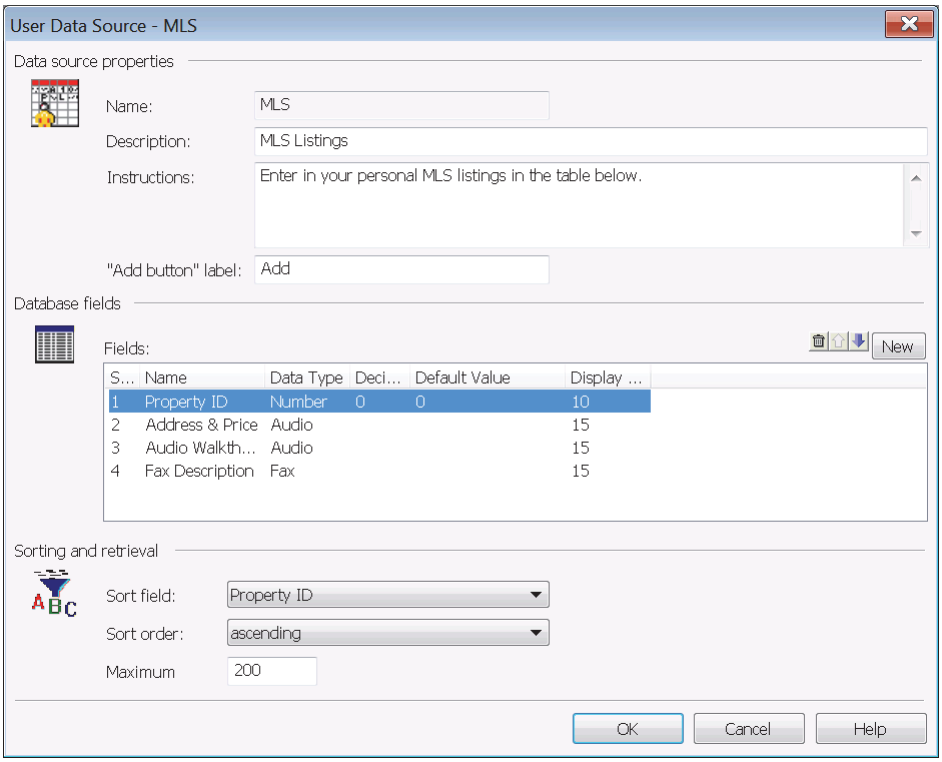
5. From the **Sort Order** list, select one of the following:
   - **ascending**—sorts information in ascending order
   - **descending**—sorts information in descending order
6. Select **OK**.

Defining user data sources

The User Data Source Editor allows you to create user data tables. Display options allow you to define how the user data table is displayed for the user. Decide which fields you want to include, and how they are sorted and retrieved. A user data source is defined once, and each user, including the Administrator, has an individual copy of the table.



Users cannot share user data tables; each user adds data and maintains individual data tables. Only the Administrator and Personal Business Assistant users can edit the data in their copy of a user data table.

Other options include sorting and retrieving user data.

To create a new user data source

1. Right-click anywhere in the Data Sources content pane.
2. Select **New > User Data**.
3. Type a name for the new user data source in the Name box.
4. If you do not want to further define the user data source, you can select **OK** to save it.

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To edit user data source display options

1. In the Data Sources content pane, double-click the user data source that you want to edit.
2. In the **Description** box, type the title of the user data source.
3. In the **Instructions** box, type the instructions that you want the user to follow when using the data source.
4. In the **Add Button Label** box, type the title that you want to display on the user add button.
5. Select **OK** to save the changes.

To add a field in a user data source

1. In the Data Sources content pane, double-click the user data source that you want to add a field to.
2. Select the **New** button.
3. Select the **Name** section of the new field.
4. Type a name for the field.
5. Select the **Data Type** section of the new field to obtain a list of data types.
6. Select a data type from the **Data Type** list.
7. Repeat steps 3 to 7 until you have added all the fields that you want.
8. Select **OK**.

To change the order of a field in a user data source

1. In the Data Sources content pane, double-click the user data source that you want to change.
2. Select the field that you want to change the order of.
3. Select one of the following buttons:
   - **Up**—moves the selected field up one row in the list of fields
   - **Down**—moves the selected field down one row in the list of fields
4. Select **OK**.

To delete a field in a user data source

1. In the Data Sources content pane, double-click the user data source from which you want to delete a field.
2. Select the field that you want to delete.
3. Select the **Delete** button.
4. Select **OK**.

A Fetch Data or Dial for Data element can retrieve more than one row depending on the number of rows in the source, and your filter conditions. When one or more rows are fetched, a reference to a field by another element is always a reference to the field's value in the current row, in the set of rows fetched. The Move

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Current Row and Prompt for Current Row elements can be used to change which row is current. Immediately after a Fetch Data or Dial for Data element is executed, the current row is the first row.

- When only one row is fetched, the first row is the single row that was fetched.
- When multiple rows are fetched, which row is first depends on whether you defined a sort in the data source definition.

Defining a sort order

If you define a sort order in a User Data data source, this defines the default order of the rows fetched by a Fetch Data or Dial for Data element. However, a Fetch Data element can override this order. Sorting is always done by the NetVanta UC Server for this type of data source.

- If no sort order was defined, then the order of the rows is determined by the data source, and you should not make any assumptions about the order.
- If a sort order is defined, the first row is the first row in the sort order specified. However, if the sort field contains duplicate values, the order of rows with the same sort value is determined by the data source, and you should not make any assumptions about the order.

For example, assume that you have a data source with a Date field, and that each row in the data source has a unique date value. If the data source defines a sort order based on this Date field and descending order, then any Fetch Data element that fetches from the data source will retrieve rows in descending date order. If a Fetch Data element fetches multiple rows, then the first row will be the row in the fetched set of records with the newest value in the Date field. Thus another element referencing this Fetch Data element would always reference the newest row. Without the sort, you cannot predict which row in the retrieved set would be first.

To define user data source sorting and retrieval options

1. In the Data Sources content pane, double-click the user data source that you want to define.
2. From the **Sort Field** list, select the field that you want to sort.
3. From the **Sort Order** list, select ascending or descending.
4. In the **Maximum Rows** box, type the number of rows that you want to retrieve for each query.

   The default number of rows is 200.
5. Select **OK**.

Managing data in user data tables

After you create a user table, you can add, change, and delete the information included in your copy of the

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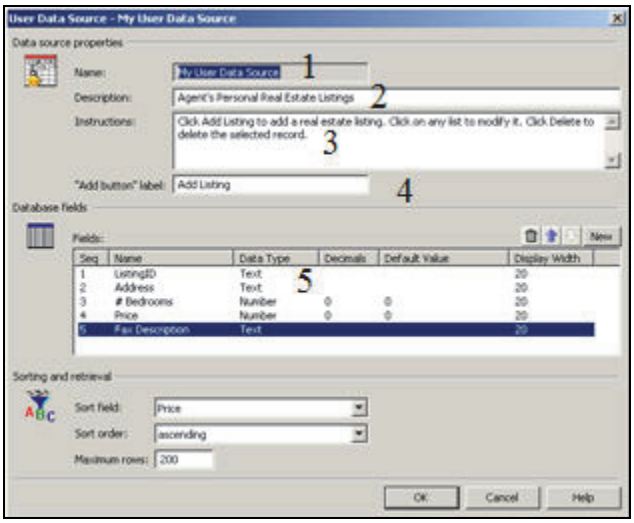
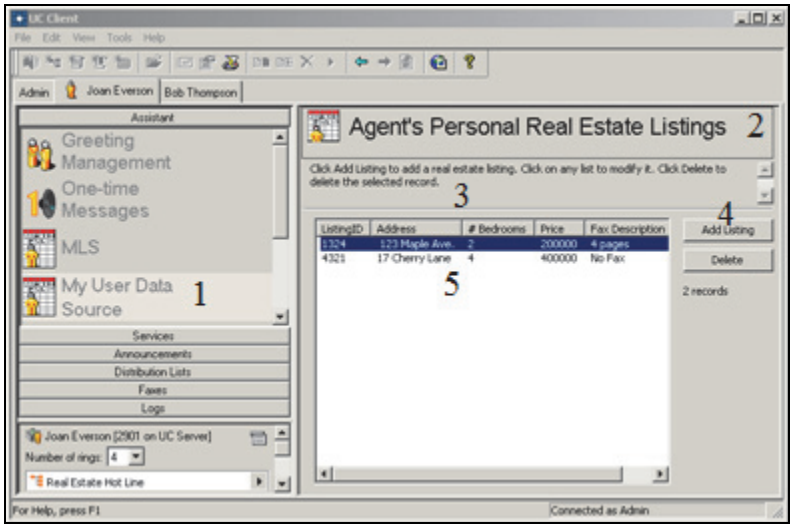
table.





The information—represented above by the numbers 1 to 5—that you enter when you create a user data table in the administrator application (on the top), appears in the user's copy of the table (on the bottom).

To add information to a user data table

1. In the Data Sources content pane, right-click the user data source that you want to add information to.
2. Select **Edit** to open the user data source.
3. Select the **Add** button to add a row to the table. Each field has the default value defined in the data source definition.
4. Select **Close** to close the table.

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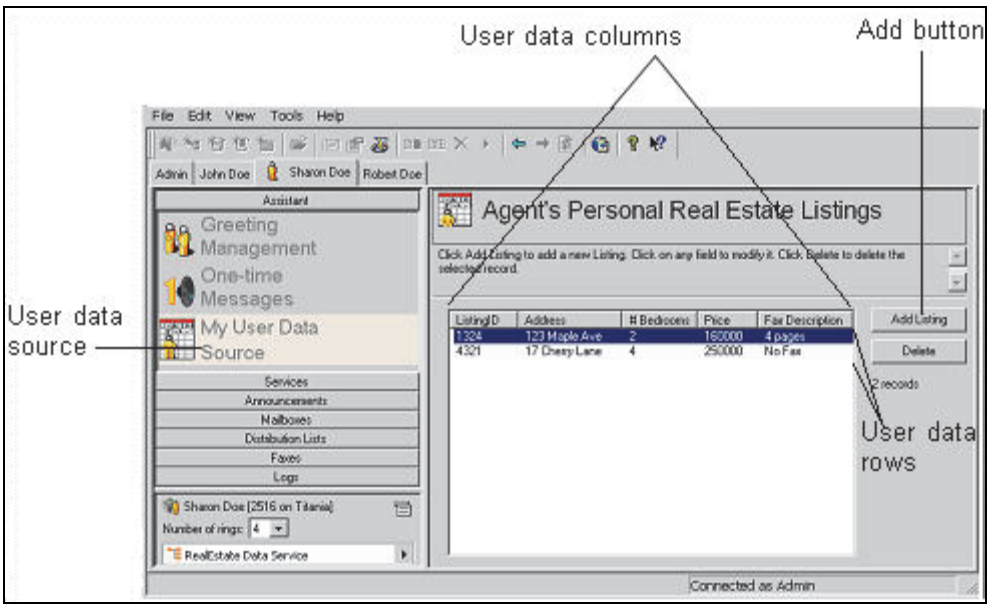

To change information in a user data table

1. In the Data Sources content pane, right-click the user data source that you want to change.
2. Select **Edit** to open the user data source.
3. Select the field value that you want to change to open a new window.
4. In the new window, type the change.
5. Select outside the window to close it.
6. Select **Close** to close the table.

To delete a row in a user data table

1. In the Data Sources content pane, right-click the user data source in which you want to delete a row.
2. Select **Edit** to open the user data source.
3. Select the row that you want to delete.
4. Select the **Delete** button.
5. Select **Close** to close the table.

Data tables allow you to access, change, and delete information on the computer or over the telephone. For example, a real estate agent can use a data table to include information, such as an address or price, for each property that the agent has listed. While away from the office, the agent can call into the office and

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access the data table to add, change, or delete information about a particular property.

> **NOTE** *The data sources feature is available only if your system is licensed for database integration.*

> **NOTE** *For a user data source to appear in the Assistant pane, you must have a service that accesses that user data source assigned to one of your identities. For information about accessing data sources in a service, refer to* *Data Type Definitions on page 158*.

> **NOTE** *If a new field is added to an existing table, then the value for that field for all existing records will be set to [NO VALUE].*

To add information in a user data table

1. In the **Assistant** menu, select the user data table to which you want to add information.
2. Select the **Add** button to add a row to the table.

> **NOTE** *The Add button is editable and might have a different title.*

3. Select the column in which you want to add information.
4. Enter the information that you want to add.
5. Select anywhere outside the column to deselect it.
6. Repeat steps 3 to 5 until all the information is added for the data row.

To change information in a user data table

1. In the **Assistant** menu, select the user data table that you want to change.
2. Select the column that has the information that you want to change.
3. Enter the change.
4. Select anywhere outside the column to deselect it.

To delete a row in a user data table

1. In the **Assistant** menu, select the user data table from which you want to delete information.
2. Select the row that you want to delete.
3. Select the **Delete** button.

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Data Type Definitions

Data Type	Value	Examples
Text	A string of characters	123 Maple Avenue
Number	A number with optional sign, decimal places, and commas	160,000.00
Logical	A string whose value can be only **true**, **false**, **1** or **0**. The numbers, **1** and **0**, correspond to true and false, respectively.	True False 1 0
Phone Number	Any string that can be parsed as a phone number into canonical form. A canonical telephone number represents a dialable number that can be understood and interpreted around the world, for example: +Country Code (Area Code) Subscriber Number In North America, the following is an example of a canonical telephone number: +1 (613) 555-1212	+1 (613) 555-1212 6135551212
Audio	The value of the field in valid .wav format	PropertyDescription.wav
Fax	The value of the field in valid .tif format	Data Sheet.tif
Day of Year	A date without a year, for example, January 1 is New Year's Day	September 16 09-16 Sep 16
Date	A date that includes the day, month, and year. Valid formats include YY-MM-DD, YYYY-MM-DD, and text versions as illustrated in the examples.	September 16, 2007 Sep 16, 2007 07-09-16 2007-09-16
Day of Week	The full day name in English, as a string. The strings can also be in abbreviated formats.	Sunday Sun
Time of Day	A time that includes the hour, minutes, and seconds (optional). Valid formats include HH:MM AM/PM. The AM/PM is optional, however AM is assumed unless the hour is greater than or equal to 12. For example, 12:02 means 12:02 PM.	2:00 PM
Time Range	Two times of day separated by a hyphen, which indicates a time range. Valid formats are HH:MM AM/PM - HH:MM AM/PM, with AM/PM being optional. As above, AM is assumed unless the hour is greater than or equal to 12. For example, 1:00 means 1:00 AM.	2:00 PM - 4:00 PM
Voice	A string of characters containing the name of a NetVanta UC Server system voice. Valid voices are all voices currently enabled on the system and **[System Default Voice]**.	English (U.S.) Male

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Accessing Data using Database Service Elements

Using database integration, you can set up services that allow callers to access current information. Also, the service creator can call in to a service to change information remotely at any time, so that callers have access to the most current information. Data accessed by data sources is dynamic and can be updated at any time.

Some elements, depending on their function, allow you to specify values or data sources. Database elements use database integration to provide information to callers and receive information from callers during a service. For example, callers to a real estate office can hear updated information about a particular property when they enter the property number over the phone during a service. In this case, the Fetch Data element processes the query and searches the database for a match.

Likewise, the real estate agent can make changes to the property information in the database by accessing the service remotely and entering the new information to the database. If the agent wants to change the list price for a property, he can access the Update Data element in the service, access the price value for the correct property, change the value, and update the database accordingly.

For more information about accessing data sources using service elements, refer to *Using Elements to Create Call Answering Services on page 97*.

> NOTE
> *To troubleshoot services using data sources, refer to* *Troubleshooting Services on page 96*.

Using the Data Source Selector

You can use the Data Source Selector feature to specify a data source, and to filter the data that is returned. The Data Source Selector is available for elements that require access to database information as part of their functionality, such as the Fetch Data, Update Data, and Dial for Data elements.

You can filter data by selecting a data source field, a comparison operator, and a value. You can filter the data by selecting the following comparison options:

- Equals
- Less Than
- Less Than/Equal to
- Greater Than
- Greater Than/Equal
- Between
- Not Equal

Using the value selector ▶ you can specify the value that you want to compare to the filter field.

An easily recognizable icon appears in the Source menu box to indicate the type of data that you are using

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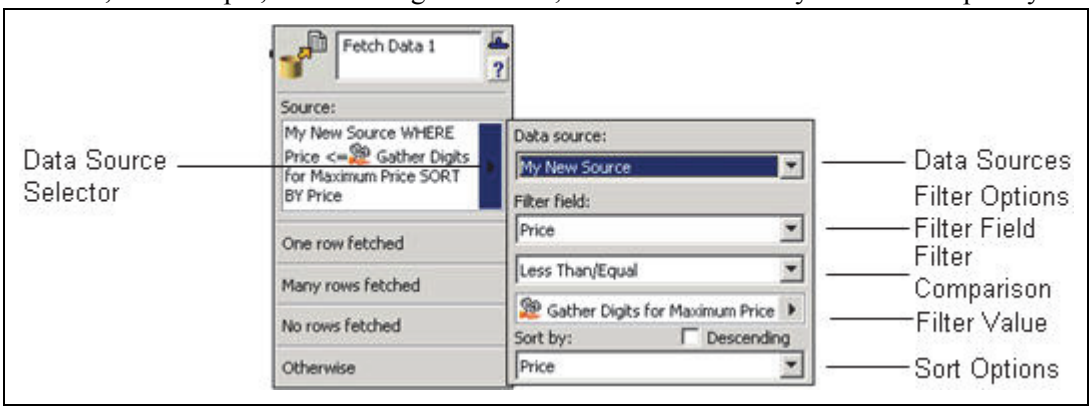
for the comparison value. For example, the Gather Digits icon appears with the name of the Gather Digits element that is included in the service.

The values that are available depend on the data source that you choose; the other elements included in the call flow, for example, a Gather Digits element; and the values that you have set up for your system.



To specify a data source for an element

1. Select the arrow in the Source section of the element.
2. Select the **Data source** that you want from the drop-down menu.
3. Select the **Filter field** that you want from the drop-down menu.
4. Select the comparison mode that you want. In the example above, **Less Than/Equal** was selected.

> NOTE *If you select **Between** A and C for example, then the values A and C are included.*

5. Select the value type that you want. For example, **Database** values, **Gather-Digits** values, or **System** values.

> NOTE *You can also enter a filter value manually in the filter value field.*

6. Select a specific value from the **value types** drop-down menu.

> NOTE *The values that are available depend on the data source; the other elements that precede the element in the call flow, for example, a Gather Digits element; and the values that you have set up for your system.*

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7. Select a sort mode, and enable Descending if you wish the results to be sorted in a descending order. When you choose a System Value in an element of a service, the information is taken from the current call and from within your system and used, for example, to fetch a value for a Fetch Data element. The table below describes and gives examples for available System Values.

System Value	Description	Example Format
Today	A NetVanta UC Server Date value representing today's date.	December 25, 2006
Current Time	A NetVanta UC Server Time of Day value representing the current time.	Format depends on location. For US and Canada, 12:02 PM.
User Name	The user profile name of the profile that owns the called extension.	Paul Smith
User Extension	The extension number where the call was initially received.	224
Selected User Name	If a Select Extension element is executed, this is the user profile name of the profile that owns the selected extension. Otherwise, it is User Name.	Mark Jones
Selected Extension	If a Selected Extension element is executed, this is the selected extension. Otherwise, it is User Extension.	225
Caller Name	The same as Matched Contact Name, if the matched contact name is not blank. If it is, the value of Caller-Id.	Paul Smith
Caller-Id	A NetVanta UC Server Text Value representing the caller. Typically, it is the form "name [number]". However, if the name is blank, it is in the form "number". It might also have special values, such as <Private Number>, <Long Distance> or <Unknown Caller>. Phone number format depends on the underlying transport.	Paul Smith [613-599-9698]
Caller-Id Name	A NetVanta UC Server Text Value containing the caller name as provided by the underlying transport.	Paul Smith
Caller-Id Number	A NetVanta UC Server Text Value containing the raw caller telephone number as provided by the underlying transport.	613-599-9698
Caller-Id Canonical Number	A NetVanta UC Server Phone Number Value containing the complete, formatted number.	+1 (613) 599-9698
Caller-Id Area Code	A NetVanta UC Server Text Value containing the area code of the number.	613
Caller-Id Area Code/Exchange	A NetVanta UC Server Text Value containing the area code and the exchange.	613599
Caller-Id Exchange	A NetVanta UC Server Text Value containing the exchange.	599

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Caller-Id Local Number	A NetVanta UC Server Text Value containing the local number without the area code and country code.	5999698
Called-Id	A NetVanta UC Server Text Value representing the called party. Typically, it is the form “name [number]”. However, if the name is blank, it is in the form “number”. It might also have special values, such as <Private Number>, <Long Distance> or <Unknown Caller>. Phone number format depends on the underlying transport.	Mark Jones [613-599-9698]
Called-Id Name	A NetVanta UC Server Text Value containing the called party name as provided by the underlying transport.	Mark Jones
Called-Id Number	A NetVanta UC Server Text Value containing the raw called party’s telephone number, as provided by the underlying transport.	613-599-9698
Port Name	The name of the port the call is using.	NetVanta UC Server
Trunk Name	The name of the trunk the call is using.	Admin Trunk 1
Current Date/Time	A NetVanta UC Server Text Value containing the current date and time	Format depends on the location of the computer, but is typically: December 25, 2006 12:02 PM
Matched Contact Name	The caller is matched to the called party’s contacts. This is a NetVanta UC Server Text Value containing the contact display name (or blank if no match).	Sharon Allen
Next Unique Id	A NetVanta UC Server Text Value containing a globally unique string (36 characters long). This value can be referenced only using the Add Data element and is used to assign a unique value to a database field. The Add Data element is typically followed by a Fetch Data element accessing the same table and using the Last Unique Id value to fetch the record just added. Do not depend on the specific format of these unique values	Although the actual format is not important, it is typically the following: 0E49D111-55AC-4794-9361-1B7320D694BD
Last Unique Id	A NetVanta UC Server Text Value containing the most recent unique string generated by Next Unique Id.	Refer to Next Unique Id.
Voice	A NetVanta UC Server Text Value containing the name of the enabled system voice. When the value is set to [System Default Voice], the value used is the name of the current system’s default voice.	English (U.S.) Male

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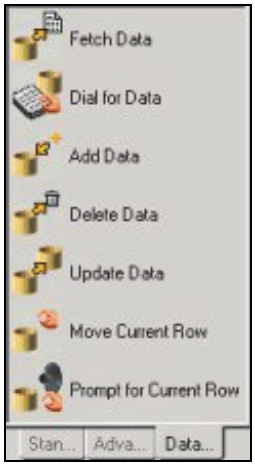
Using Database Elements

> **NOTE** *To access database information the system must be licensed for database integration. If you are not licensed for database integration then the Database tab of elements is not visible.*

Database elements rely on database integration to provide data to callers during a service. Database integration allows services to be dynamic and data driven.



The Database elements tab is shown above. A brief description is provided for each element available to the Administrator.

Table 11–1: Database elements

Fetch Data element on page 164	This accesses the specified data source and fetches the required data
Dial for Data element on page 165	This accesses the specified data source and fetches the data specified by the caller
Add Data element on page 167	This allows a caller to add data to a specified data source
Delete Data element on page 168	This allows a caller to delete data from a specified data source
Update Data element on page 169	This updates the data contained in a specified data source
Move Current Row element on page 170	This allows callers to modify which row is the current row in a multi row set, retrieved by either the Fetch Data or Dial for Data elements.
Prompt for Current Row element on page 171	Using a series of prompts, this allows callers to use the keypad to select which row becomes the current row.

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Fetch Data element

The Fetch Data element allows you to specify a data source using the Data Source Selector, and query the data source so that the NetVanta UC Server fetches the data that you want.

Use a second Fetch Data element to further filter or sort the results of the first, a third to further filter or sort the results of the second, and so on. For example, a real estate service is set up to access a database of real estate listings. A Fetch Data element is specified to fetch all rows that match a certain price range. If several rows are fetched that match that criterion, the call moves through the Many rows fetched connector pin to another Fetch Data element that further searches those listings and fetches rows based on the number of bedrooms, until it finds the single listing that matches all criteria.

- If the Fetch Data element fetches one row, the call exits from the **One row fetched** connector pin.

Fetch Data element

- If the Fetch Data element fetches more than one row, then the call exits from the **Many rows fetched** connector pin.
- If no rows of data are fetched, then the call exits the **No rows fetched** connector pin.
- If any other condition exists, such as an inability to access a Data Source (such as an external database or internal User Data Table), then the call exits the **Otherwise** connector pin.

A Fetch Data element can retrieve more than one row depending on the number of rows in the source, and your filter conditions. When one or more rows are fetched, a reference to a field by another element is always a reference to the field's value in the current row, in the set of rows fetched. The Move Current Row and Prompt for Current Row elements can be used to change which row is current. Immediately after a Fetch Data or Dial for Data element is executed, the current row is the first row.

- When only one row is fetched, the first row is the single row that was fetched.
- When multiple rows are fetched, which row is first depends on whether a sort order was defined by the Administrator.

If no sort order was defined, then the order of the rows is determined by the data source, and you should not make any assumptions about the order. If a sort order is defined, the *first* row is the first row in the sort order specified. However, if the sort field contains duplicate values, the order of rows with the same sort value is determined by the data source, and you should not make any assumptions about the order.

For example, assume that you have a data source with a Date field, and that each row in the data source has

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a unique date value. If the data source defines a sort order based on this Date field and descending order, then any Fetch Data element that fetches from the data source will retrieve rows in descending date order. If a Fetch Data element fetches multiple rows, then the *first* row will be the row in the fetched set of records with the newest value in the Date field. Thus another element referencing this Fetch Data element would always reference the newest row. Without the sort, you cannot predict which row in the retrieved set would be *first*.

When a Fetch Data element fetches one or many rows, the first row becomes the *current* row. The order of the rows is determined by the sorting modes selected, as described above.

Other elements can refer to fields fetched by the Fetch Data element. These elements reference the value in the current row. A different current row can be selected, using the *Move Current Row element on page 170* or *Prompt for Current Row element on page 171* elements.

For information about specifying data sources, filter fields, and values, refer to *Using the Data Source Selector on page 159*.

Dial for Data element

The Dial for Data element allows you to specify a data source using the Data Source Selector. It is similar to the Fetch Data element, except the caller uses the telephone keypad to define the data that is fetched.

The Dial for Data Source Selector allows you to specify the following:

- data source
- optional filter condition, for example a value
- Select On field

When a caller encounters the Dial for Data element, the element selects the records from the source that match the filter condition (it fetches all the records if no filter condition is specified). Then the element prompts the caller to enter the value for the Select On field. A search using the Dial for Data element ignores blanks and special characters. The default search criteria include only alphabetic characters. If you

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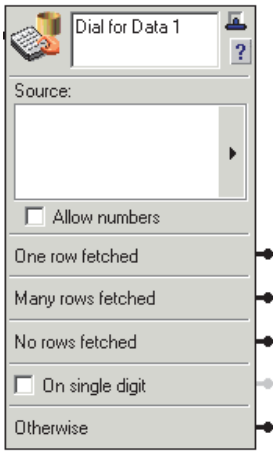
specify Allow numbers, numeric characters are also included in the search.



Dial for Data element

> **NOTE** *The letters Q and Z appear on different keys on different phones. The Dial for Data element works whether the letter Q corresponds to the 0 or the 7 key, and whether the letter Z corresponds to the 0 or the 9 key.*

- If the Dial for Data element fetches one row, the call exits from the **One row fetched** connector pin.
- If the Dial for Data element fetches more than one row, then the call exits from the **Many rows fetched** connector pin
- If no data rows are fetched, then the call exits the **No rows fetched** connector pin.
- If you enable the **On Single Digit** check box, the call exits that connector pin when the caller enters only one digit, or the call times out after one digit is entered.
- If any other condition exists, such as the inability to access a Data Source, such as an external database or internal User Data Table, then the call exits the **Otherwise** connector pin.

A Dial for Data element can fetch more than one row depending on the number of rows in the source, the filter conditions, and the field the user will select on. When one or more rows are fetched, a reference to a field by another element is always a reference to the field's value in the first row, in the set of rows fetched.

- When only one row is fetched, the first row is the single row that was fetched.
- When multiple rows are fetched, which row is first depends on whether a sort order was defined by the Administrator.

If no sort order was defined, then the order of the rows is determined by the data source, and you should not make any assumptions about the order. If a sort order is defined, the *first* row is the first row in the sort order specified. However, if the sort field contains duplicate values, the order of rows with the same sort value is determined by the data source, and you should not make any assumptions about the order.

For example, assume that you have a data source with a Date field, and that each row in the data source has a unique date value. If the data source defines a sort order based on this Date field and descending order, then any Dial for Data element that fetches from the data source will retrieve rows in descending date order. If a Dial for Data element fetches multiple rows, then the first row will be the row in the fetched set

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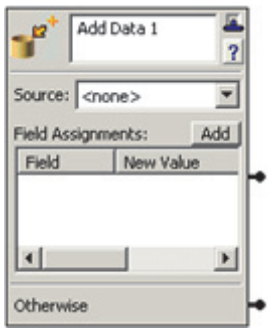
of records with the newest value in the Date field. Thus another element referencing this Dial for Data element would always reference the newest row. Without the sort, you cannot predict which row in the retrieved set would be first.

When a Dial for Data element fetches one or many rows, the first row becomes the *current* row. The order of the rows is determined by the sorting modes selected, as described above.

Other elements can refer to fields fetched by the Dial for Data element. These elements reference the value in the current row. A different current row can be selected, using the *Move Current Row element on page 170* or *Prompt for Current Row element on page 171*. For information about specifying data sources, filter fields, and values, refer to *Using the Data Source Selector on page 159*.

> NOTE
> *You can put a Play Announcement element before a Dial for Data element to give the caller instructions about how to use the feature.*

Add Data element



Add Data element

The Add Data element allows callers to add to the data in a specified data source. The Record Announcement element can be used to record temporary recordings, which can be used with the Add Data element as a form filling application, in order to request quotes, have callers answer general customer service questions, and so on. For more information on temporary recordings, refer to *Allowing Callers to Make Temporary Recordings Within a Service on page 99*.

- If the data is added successfully, the caller exits the regular connector pin.
- If the data is not added successfully, for any reason, the caller exits the Otherwise connector pin.

To specify a source and fields for the Add Data element

1. Select a data source from the **Source** drop-down menu.
2. Select the **Add** button to add a Field Assignment to the list.
3. Select the **Field** column to obtain a drop-down menu of fields in the data source.
4. Select a field from the drop-down menu.
5. Select the **New Value** column to specify a value for the field.

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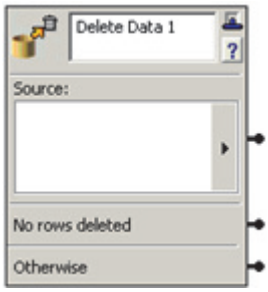
6. Enter a value, or select the value selector ▶ in the blank new value field.
7. Select anywhere outside the new value field.
8. Repeat steps 2 to 7 to add more fields to the **Field Assignments** list.

To delete a field assignment for the Add Data element

1. Right-click the **Field** column of the field assignment that you want to delete.
2. Press **Delete**.

Delete Data element

The Delete Data element allows callers to delete data in a specified data source.



Delete Data element

If some rows are deleted successfully, the caller exits the Source connector pin. If no rows are deleted, the caller exits the No rows deleted connector pin. If any other condition exists, the caller exits the Otherwise connector pin. For information about specifying data sources, filter fields, and values, refer to *Using the Data Source Selector on page 159*.

> **CAUTION**
> *For security reasons, when including a Delete Data element in a service, you might want to put a Verify Password element before it. Make sure that you specify exactly the data that you want to make available for deletion. For example, if you do not include a filter field and value,* ***all rows*** *are deleted.*

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Update Data element

Update Data element

The Update Data element allows callers to update the data in a specified data source. The Record Announcement element can be used to record temporary recordings, which can be used with the Update Data element as a form filling application, in order to request quotes, have callers answer general customer service questions, and so on. For more information on temporary recordings, refer to *Allowing Callers to Make Temporary Recordings Within a Service on page 99*.

- If some rows are updated successfully, the caller exits the regular connector pin.
- If some rows are not updated, the caller exits the No rows updated connector pin.
- If any other condition exists, the caller exits the Otherwise connector pin.

To specify field assignments for the Update Data element

1. Use the data source selector arrow to specify the data source that you want.
2. Select the **Add** button on the **Update Data** element to add a **Field Assignment** to the list.
3. Select the **Field** column to obtain a drop-down menu.
4. Select a field from the drop-down menu.
5. Select the **New Value** column to specify a value for the field.
6. Enter a new value, or select the value selector ▸ in the blank new value field.
7. Select anywhere outside the new value field.
8. Repeat steps 2 to 7 to add more fields to the Field Assignments list.

CAUTION

*Make sure that you specify the filter condition correctly. For example, no filter condition means that **all rows** are updated using the specified assignments.*

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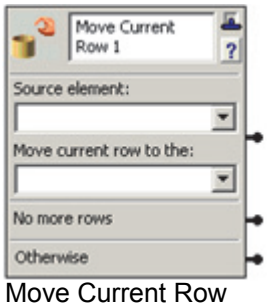
Move Current Row element



Move Current Row element

When using the *Fetch Data element on page 164* or *Dial for Data element on page 165*, a set of rows are fetched from the database. The **Move Current Row** element moves the current row in a set of rows fetched. The current row can be moved to be the first row in a set of rows, the last row, the next row, or the previous row.

The Source element for a Move Current Row element can be the name of any other Fetch Data or Dial for Data element in the service. The current row can be moved to the first row, last row, next row, or previous row in the set of rows associated with the Fetch Data or Dial for Data element.

- If the current row moves to another row, then the element exits through the **Source element** connector pin.
- If moving the current row moves it beyond the last row, before the first row, if there are no rows, or if the Source element has not been executed yet, then the element exits through the **No more rows** connector pin.
- If an error occurs, then the element exits through the **Otherwise** connector pin.

We'll use a simplified version of a real estate listing service to illustrate how the Move current row element works. For example:

- The first element is a Fetch Data element that fetches some real estate listings.
- The second element is the Text to Speech (TTS) element which speaks the property identifier from the current row, and introduces the audio that follows.
- The third element is a Play Announcement element that plays the audio for the current row, and contains the address and price for the current listing.

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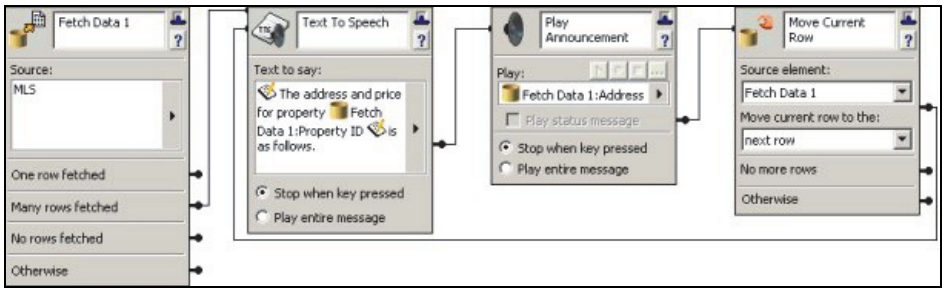
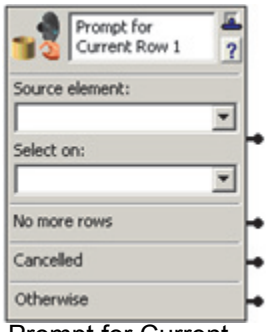
- The fourth element is the Move current row element, which moves the current row to the next row.
  - If there is another row, the service loops back to the TTS element, which now uses the value from this row.
  - If no more rows are available, the Move current row element exits through the No more rows connector pin.



Prompt for Current Row element

The Prompt for Current Row element prompts callers to select a specific row from multiple rows fetched by a *Fetch Data element on page 164* or *Dial for Data element on page 165*. Callers press keys on the keypad in response to prompts such as "For..., press 1, for..., press 2..." Callers select a specific item which becomes the current row.



Prompt for Current Row element

The Source element for a Prompt for Current Row element allows you to select a Fetch Data or Dial for Data element in the service. The **Select on** drop-down menu contains the names of fields in the Source element, with the exception of Audio or Fax fields.

- If the Source element has exactly one row, the element exits immediately through the **Source element** connector pin.
- If the record set indicated by the Source does not exist (the element has not been executed yet), or if it has no rows, then the element exits immediately through the **No more rows** connector pin.
- If the caller presses an invalid key, or fails to press a key within a few seconds, then the last prompt is

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repeated. If this occurs three times, or if an internal error occurs, then the element exits through the **Otherwise** connector pin.

If the Source element has more than one row, using Text to Speech (TTS), the element prompts the callers with "Press 1 for <value 1>, Press 2 for <value 2>," and so on, where the values of the Select on field are from the set of rows associated with the source element. The caller is prompted for up to six choices.

- The element follows with the prompt "Press 8 to repeat these choices."
- If there are more than six rows, then it prompts with "Press 9 for more choices."
- Finally, the element prompts with "Press 0 to start over."

If the caller enters the number associated with a specific row value, the associated row becomes the current row, and the element exits through the **Source element** connector pin.

- If the caller presses 8, the prompts are repeated.
- If the caller presses 0, the same prompt for the first group of rows is repeated.
- If there are more than six rows and the caller presses 9, the element prompts with "Press 1 for <value>..." as before, but the values are now taken from the next group of rows. This prompt is followed by "Press 7 for previous choices," and the other prompts as noted above. Pressing 7 causes the prompt for the previous group of rows to be played.

The process continues until the caller selects a specific row. The caller uses the 7 and 9 keys to move backwards and forwards through the set of rows.

Key Pressed	Results
0	The prompt for the first row set is played.
1-6	This selects the associated row value, and becomes the current row. The element exits through the Source element connector pin.
7	If there are previous row sets, the prompt is played for the previous six rows.
8	The previous prompt is replayed.
9	If there are more rows, the prompt is played for the next six rows or less.

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12. Importing and Exporting

This chapter explains how to use the Import/Export Wizard and covers the following topics:

- *Overview on page 173*
- *Starting the Import/Export Wizard on page 173*
- *Importing and Exporting Items on page 173*

Overview

The Import/Export Wizard allows you to share announcements, services, faxes, and fax cover pages by importing items from another location, or exporting them from your computer to another location so that other people can import them and use them.

Starting the Import/Export Wizard

To start the Import/Export wizard

1. Select **File > Import-Export Wizard** to open the wizard welcome menu.
2. Select **Next**.

Importing and Exporting Items

The Import/Export Wizard guides you through the process of importing or exporting an item.

To import an item

1. Using the **Task Selection** drop-down menu, select **Import data from the File System**, and then select **Next**.
2. In the **Import Directory** field, make sure that the destination folders are correct. You can use the Browse button to change the default destination folder.

> **NOTE** *The default destination is:* `C:\Documents and Settings\username\My Documents\Export\`

3. Select **Next**.
4. Select all the items that you want to import, and then select **Next**. Make sure that the box next to the item has a check mark in it before you proceed.

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5. If you want to delete an item in the change destination field, select the item and then select the **Delete** button.
6. If you want to change the destination of an item, select the item and then select the **Change destination** button.
7. Select **Next** to transfer the items.
8. Select **Next** when the wizard is done.
9. Select **Finish**.

To export an item

1. Using the Select task to perform drop-down menu, select **Export to the File System**, and then select **Next**.
2. Select the directory where the items that you want to export are located, and then select **Next**.
3. Select all the items that you want to export, and then select **Next**. Make sure that the box next to the item has a check mark in it before you proceed.
4. Select **Finish** when the wizard is finished exporting the items.

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13 Setting Options

This chapter explains how to set various options. Options fall under the following categories:

- *Setting General Options on page 175*
- *Setting Message Delivery Options on page 176*
- *Customizing your Mailbox on page 178*
- *Setting Integrated Messaging Options on page 180*
- *Compressing Voice Messages on page 181*

> NOTE
> *For more information on setting mailbox options, refer to Customizing your Mailbox on page 17.*

Setting General Options

If you are a local message store user, you are prompted to enter your mailbox number, name, or password each time you log in. You can enable the automatic login option if you do not want to enter your information each time you log in.

Your user profile has a time zone setting that indicates in which time zone you are typically located. The time zone setting effects the times and dates that appear on voice, fax, and email messages when you access your mailbox using the telephone user interface.

If you travel, or are relocating to another site for a period of time, you can change your time zone settings.

You can set how the message waiting light on your phone operates. The message waiting light behavior can also be set by your administrator either system wide or individually, and this setting may differ from your own setting. The message waiting light behavior in effect corresponds to the last option set. Thus if the administrator changes the system wide setting or your individual setting after you have set your message waiting light behavior, then you will need to reset it in order for your settings to take effect.

To change the automatic login option

1. Select **Tools > Options**.
2. Select the **General** tab.
3. Enable the **Enable automatic login** check box.
4. Select **OK**.

To change your time zone setting

1. Select **Tools > Options**.
2. Select the **General** tab.

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3. In the Time zone section, select the Time zone list.
4. From the Time zone list, select the time zone that you want.

> **NOTE** *When you run the First Time Access Wizard, the time zone setting for your profile is set to the time zone of the computer running the first time access wizard. If the time zone is the same as the server's time zone, the setting is* ***Same time zone as server system****.*

To change your message waiting light behavior

1. Select **Tools > Options**.
2. In the **General** tab, select one of the message waiting light options.

Use system defaults	The message waiting light behavior for your phone is set according to the system wide setting set by your administrator.
Never turn on or off	UC client does not manage the message waiting light
Turn on when new message arrives	
Turn off when first message is accessed in mailbox	The light turns off when you *access* the first new message in your mailbox, regardless of whether you disconnect before listening to the message.
Turn off when no more new messages in mailbox	The light turns off when you access the last new message in your mailbox.

3. Select **OK**.

> **NOTE** *Any changes to the message waiting light options come into effect immediately.*

Setting Message Delivery Options

Message delivery options apply to the Deliver Messages element.

When a Deliver Messages element is included in an active service and a message has been received, the application calls a list of specified numbers until it reaches you. You can set the number of attempts to deliver messages. You can also specify the interval between successive delivery attempts.

You can also cancel Active Message Delivery by specifying certain conditions. When the condition is met, Active Message Delivery is canceled. If the UC client is between calls, Active Message Delivery is discontinued, and no further attempts are made. If an outgoing call is already in progress, that call continues until completion.

You can specify a default account code for outgoing calls. An account code is used for accounting and

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security. A caller who does not have an account code cannot access specified information.

You can use account codes to allow long distance dialing, in which the telephone company applies the long distance charges to your account code.

To set the number of attempts to deliver a message to each number you have specified

1. Select **Tools > Options**.
2. Select the **Message Delivery** tab.
3. In the **Retry** text box, select the number of attempts to deliver to each number. The default number of attempts is **3**.
4. Select **OK**.

To set the number of minutes to wait between delivery attempts

1. Select **Tools > Options**.
2. Select the **Message Delivery** tab.
3. In the **Delay** text box, select the number of minutes to wait between delivery attempts. The default delay period is **3** minutes.
4. Select **OK**.

To specify a default account code

1. Select **Tools > Options**.
2. Select the **General** tab.
3. Type the default account code in the **Account code** box.
4. Select **OK**.

To specify conditions to cancel Active Message Delivery

1. Select **Tools** > **Options...**
2. Select the **Message Delivery** tab.
3. In the **Cancel active message delivery** section, select one of the following options:
   - **Mailbox is accessed**—Active Message Delivery is discontinued when you access your mailbox
   - **Mailbox has no new voice or fax messages**—Active Message Delivery is discontinued when there are no new voice or fax messages in your mailbox
   - **Mailbox has no messages**—Active Message Delivery is discontinued when there are no messages in your mailbox

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Customizing your Mailbox

Mailbox options allow you to customize your mailbox. Mailbox options include:

- Changing the amount of information played about your messages
- Changing the type of messages played and the order in which they are played
- Setting whether to play information about each message
- Setting whether to verify your password when checking messages from your extension

Changing the message summary

A message summary plays after you enter your password. The message summary includes:

- The number of messages in your mailbox
- The type of messages in your mailbox (voice, fax, or email)
- Whether messages are new or saved

There are three modes for message summary. They are:

Disabled	No message summary is provided.
Quick	The message summary provides limited information. For example: "You have five new messages and six saved messages." This is the default mode.
Verbose	The message summary provides detailed information. For example: "You have five new voice messages, four new fax messages, 30 new email messages and 50 saved messages."

To set the message summary mode using the desktop

1. Select **Tools > Options**.
2. Select the **Mailbox** tab.
3. In the Mailbox message summary section, select one of the following:
   - **Disabled**
   - **Quick**
   - **Verbose**
4. Select **OK**.

Sorting messages

The message sorting options allow you to choose in what order you want to listen to your messages. You can change the message sorting options using the desktop. The default message sorting option is to listen to voice and fax messages only.

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To change message sorting options

1. Select **Tools > Options**.
2. Select the **Mailbox** tab.
3. In the Mailbox message sorting section, choose one of the following options:
   - **Listen to all messages in the order they were received**
   - **Listen to voice and fax messages only**
   - **Listen to voice and fax messages first then email messages**
4. Select **OK**.

Turning message information on or off

Message information is played before each message. It includes:

- Caller ID
- Date and time the message was received

The default setting for message information is **on**.

To turn message information on or off using the desktop

1. Select **Tools > Options**.
2. Select the **Mailbox** tab.
3. Enable the **Play message information before message** check box to enable message information.

   To disable message information, clear the check box.
4. Select **OK**.

Turning password verification on or off

You can specify password verification when you call to check messages from your own extension. The default setting is **off**.

To turn password verification on or off

1. Select **Tools > Options**.
2. Select the **Mailbox** tab.

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3. Enable the **Password verification** check box to turn Password verification on.

   To turn password verification off, disable the check box.

4. Select **OK**.

Setting Integrated Messaging Options

Local message store users can specify display and notification options for new messages. IMAP users can change the password they use to access their mailbox.

To specify display options for new LMS messages

1. Select **Tools > Options**.
2. Select the **Integrated Messaging** tab.
3. In the When a new message arrives section, enable any of the following check boxes:
   - **Display icon in tray**—displays an icon in the bottom right-hand corner when you have a new message
   - **Display dialog**—displays a new message dialog for voice and fax messages
   - **Play wave file**—plays a sound when a new message arrives
4. Select **OK**.

> NOTE
> *Regardless of the options that are selected, messages accessed by LMS users are always played in order from oldest to newest.*

To change the new LMS message notification sound

1. Select **Tools > Options**.
2. Select the **Integrated Messaging** tab.
3. Make sure that the **Play wave file** check box is enabled.
4. Select the **Browse** button and select the wave file that you want.
5. Select **Open** to select the wave file.
6. Select **play** to hear the wave file.
7. Select **OK**.

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To change the IMAP user password

1. Select **Tools > Options**.
2. Select the **External Systems** tab.
3. In the IMAP mailbox management section, select the **Password** button.
4. In the **Password** box, type the new password.
5. In the **Re-enter** box, retype the new password.
6. Select **OK**.
7. In the **Options** dialog box, select **OK**.

> NOTE
> *The IMAP user password must match the Lotus Notes user Internet password, configured on the Lotus Notes Server.*

Compressing Voice Messages

The voice message compression level determines how incoming voice messages, greetings, and announcements are recorded and stored. Compression affects the size and quality of voice messages.

- Increasing the compression level lowers the audio quality and the file size.
- Decreasing the compression level improves the audio quality and increases the file size.

The default compression level is medium, but this level can be adjusted. For example, if you are traveling and working over modem connections, you can select the maximum compression level so that your messages are smaller. However, the audio quality will also be noticeably decreased.

To set the level of voice message compression

1. Select **Tools > Options**.
2. Select the **Incoming Messages** tab.
3. Move the slider to adjust the level of compression. The default level is **Medium**. Select **Defaults** to return the compression level to the default value.
4. Select **OK**.

> NOTE
> *When you save an attachment from your system from the Local Message Store/Integrated Client, the attachment is saved in the compression format selected. However, when you save from your system from Microsoft Exchange Server, the attachment is saved in the native compression format, which is equivalent to no compression.*

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14. Troubleshooting

Overview

You can use NetVanta UC Server logs to review calls, events, system errors or warnings.

You can configure the NetVanta UC Server to automatically generate diagnostic information in the event of errors or problems. You can also configure the diagnostic system options such that ADTRAN, your reseller, and/or yourself is notified if the NetVanta UC Server is not functioning properly.

If you cannot find the information you are looking for in this manual or in the online help, then you can go to the ADTRAN website for further information such as training materials, and a quick reference card, SIP phone user guides. For more information, refer to the following sections:

- *Troubleshooting Message Waiting Indicators on page 183*
- *Troubleshooting the NetVanta UC Server on page 184*
- *Using the NetVanta UC Server Logs on page 185*
- *Accessing Documentation and Training on page 191*

Troubleshooting Message Waiting Indicators

Sometimes message waiting indicators (MWI) on phones are incorrect following a power failure or changes to the PBX.

Symptoms

The MWI on phones are incorrect.

Possible Causes

- A power failure has occurred.
- Changes were made to the PBX.

Solution

You can resynchronize the MWI on phones.

To resynchronize message waiting indicators on phones

Select **Tools > Resynchronize All message waiting indicators**.

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Troubleshooting the NetVanta UC Server

ADTRAN has observed that third-party firewall and antivirus products can cause problems with the proper operation of the NetVanta UC Server.

> **NOTE** *The NetVanta UC Server is tested with Microsoft security products, such as Windows Firewall and Windows Defender.*

Symptoms

- NetVanta UC Server services keep shutting down with Trend Micro software installed.
- The NetVanta UC Client crashes, doesn't load forms, or produces unknown software errors.

Possible Causes

Sometimes problems can arise from third-party firewall or antivirus software installed on computers hosting the server or client software.

Solutions

Proceed with the following potential solutions in the order in which they appear. Only when solution A and B have been attempted and failed, should solution C be tried.

> **NOTE** *If a problem occurs, ADTRAN Technical Support advises that the third-party product be removed from the system prior to contacting Technical Support for assistance. For more information, refer to* *Accessing Technical Support on page 191*.

Verify that the following folders are excluded from antivirus software scanning (as noted in the NetVanta UC Server *Deployment Guide*, and in the NetVanta UC Server *Installation Guide*).

- `C:\Program Files\ADTRAN`

Or any folder in which the NetVanta UC Server application is loaded.

- `C:\ADTRANLogs`

Or the folder to which logging application is configured.

- `C:\Program Files Microsoft SQL Server`

Or the default location of the database folder.

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1. Uninstall the third-party antivirus or firewall software.
2. Shutdown the NetVanta UC Server and restart.

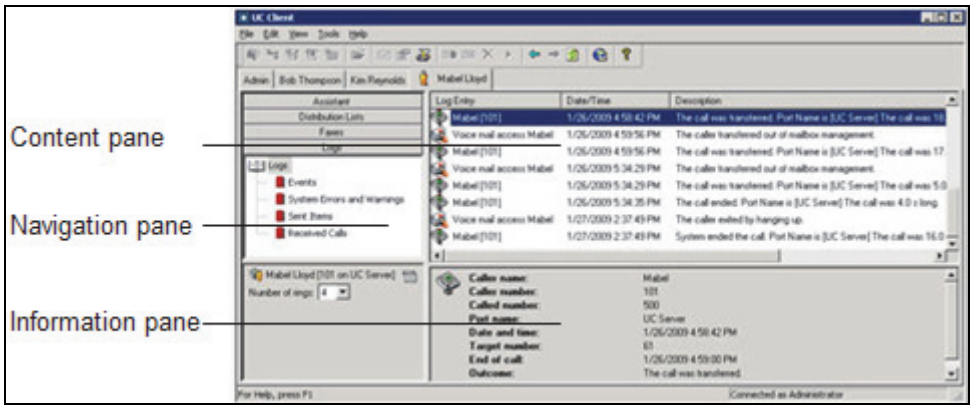
> **CAUTION** *Antivirus and firewall behavior is unpredictable even after shutting down or uninstalling.*

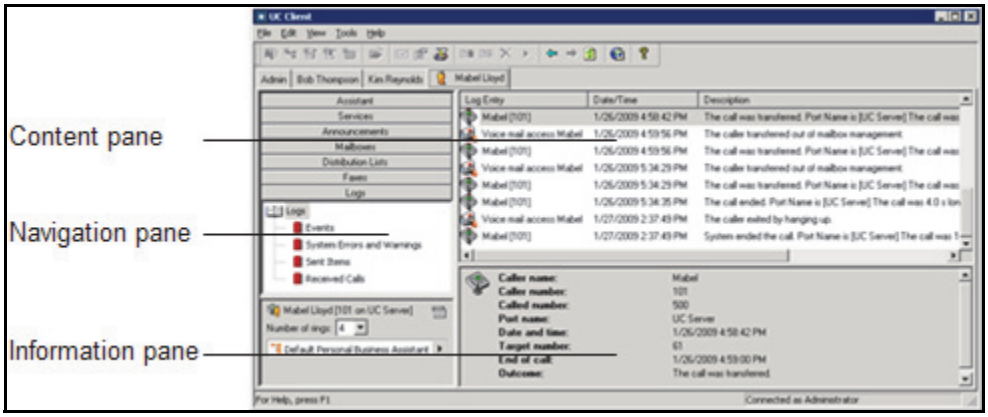
Wipe clean the computer hosting the server/client software, including the OS, and reinstall.

Using the NetVanta UC Server Logs

This section explains how to manage alert notifications of errors and warnings, logging statistics, and logs and the information that they record. Logs record events that occur while the application is enabled on your extension.

Four categories of events are recorded in logs: events, system errors and warnings, sent items, and received calls. You can view logs and store them for future reference, track activity that takes place, and troubleshoot occasional problems. Using the Import/Export wizard, you can export call logs as a tab separated or XML-based file. The call log files can be used by other reporting applications to provide historical reports on voicemail activity. For more information about the Import/Export wizard, refer to *Importing and Exporting on page 173*.





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The **Events** log tracks information related to user attempts to perform mailbox management.

The **System Errors and Warnings** log provides information that you can use to troubleshoot problems that occur with your call answering.

The **Sent Items** log tracks information on outgoing faxes and events related to the use of the Notify Pager and Deliver Messages elements. Details for each delivery or dispatch attempt are recorded, including the date and time of the attempt; the phone number dialed; the port that handled the attempt; and the final outcome of the delivery or notification attempt.

The **Received Calls** log tracks incoming calls, regardless of whether the NetVanta UC Server answered them or not. Information logged includes the caller name and phone number, if available; the date, time, and length of the call; whether the call was answered, and by which port; and whether a message was left or not.

Errors and Warnings Alert Notifications

If an error or warning occurs, for example, the NetVanta UC Server was unable to deliver a message, then the NetVanta UC Server generates an error or warning log. When an error or warning log is produced, and there were no previous unacknowledged errors or warnings, then NetVanta UC Server also produces an entry in the Windows event log to indicate what has happened. Administrators will see an orange bar displayed at the bottom of the NetVanta UC Client window as an alert that some action may be required. Conversely, when errors and warnings are acknowledged, and there are no more unacknowledged errors or warnings, then a different entry is created in the Windows event log, and the orange bar in the NetVanta UC Client disappears.

To view system errors and warning logs

1. On the left side of the NetVanta UC Client, select the **Logs** navigation bar to open the Logs menu.
2. Select **System Errors and Warnings**. On the right side in the Logs summary pane, the errors and warning logs appear.

To acknowledge the alert notification

On the right side in the Logs summary pane, right-click on an error or warning log to accept or acknowledge the error or warning. The orange bar will no longer appear, and the error or warning message is no longer visible at the bottom of the NetVanta UC Client window.

Microsoft Windows Small Business Server (SBS) 2008 records unacknowledged errors or warnings in the NetVanta UC Server. This simplifies management such that Administrators do not need to have the NetVanta UC Client open in order to be aware of any error or warning messages.

When the NetVanta UC Server is installed on Windows SBS 2008, a custom alert is automatically configured for the SBS 2008 Console. If the NetVanta UC Server is not installed on the SBS 2008 system, but is installed on another system on the network, then consult the Microsoft documentation for how to create a custom alert.

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To create a custom alert definition when the NetVanta UC Server is not installed on the SBS 2008 system

1. Refer to www.msdn.microsoft.com/en-us/library/cc721719.aspx for details on how to create a custom alert.
2. Specify the following:

Path	Application
Provider	NetVanta UC Server
SetEventID	256
ClearEventID	512

> **NOTE** *The Windows SBS Console display is refreshed every 30 minutes. This means that the console display will not change immediately when an error or warning occurs, or when all errors or warnings are accepted or acknowledged.*

To access the NetVanta UC Server alerts from Windows SBS 2008

1. From the **Start** menu access the **Event Viewer**.
2. Open the **Windows SBS Console**, and select the **Network** tab. Under Computers, any NetVanta UC Server unacknowledged errors or warnings will appear.

The log entry types are represented by different icons. The following table explains some of the icons that might appear in your list of log entries.

Table 14–1: Log entry icon definitions

Icon	Definition
	Error—represents an error, for example in voice message delivery
	Warning—represents a warning
	Received calls—represents calls that come in on a specified port

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Table 14–1: Log entry icon definitions

	Voice Mail access—represents a voice message event, for example, a voice message sent from a NetVanta UC Server user to another user
	Pager access—represents events in which NetVanta UC Server users send or receive a page
	Message delivered
	Voice Mail access—represents user voicemail access, for example, users accessing their own mailbox to receive voice messages
	Log entry

Managing logs

To get the Logs menu, select the Logs navigation bar. You can retrieve and view, remove, and archive logs. You can rename and delete log archives, and export a call log using the Import-Export wizard.

To retrieve and view a log

1. Double-click the log folder that you want to view. The contents of the log are displayed in the summary pane. When a log folder is open, its icon appears as an open book.

Closed log folder

Open log folder

2. Use the vertical scroll arrows to view the list of log entries.
3. Select a log entry to view information about it in the details pane.

To remove old log entries

1. Right-click anywhere in the summary pane.
2. Select **Clear log**.

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3. Select one of the following:
   - **Everything**
   - **Entries created before today**
   - **Entries created before the beginning of the month**
   - **Entries created before a specific date**

> NOTE *If there are unacknowledged errors or warnings, you cannot archive or clear log items. You must accept the notifications first.*

4. If you enabled **Entries created before a specific date**, enter the date in the field.
5. Select **OK**.

To archive a log

1. Right-click anywhere in the summary pane.
2. Select **Archive log**.
3. Select one of the following:
   - **Everything**
   - **Entries created before today**
   - **Entries created before the beginning of the month**
   - **Entries created before a specific date**

> NOTE *If there are unacknowledged errors or warnings, you cannot archive or clear log items. You must accept the notifications first.*

4. If you enabled **Entries created before a specific date**, enter the date in the field. The new archive is put in the navigation pane as a log with a default title based on the current date.

Log archive

5. Select **OK**.

To rename a log archive

1. Select the archive that you want to rename.
2. Select **Edit > Rename**.
3. Enter a new name for the archive.

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To delete a log archive

1. Select the archive that you want to delete.
2. Select **Edit > Delete**.
3. Select **Yes** to confirm the deletion.

To export a call log using the Import-Export wizard

1. Select **File > Import-Export Wizard**, and then select **Next**.
2. Select **Export Activity Report**, and then select **Next**.
3. Select the types of logs that you want to export, and then select **Next**.
4. Enable either of the following, and then select **Next**:
   - **All logs**—exports all call logs
   - **Date range**—exports call logs from within a range of dates that you specify
5. Select the file type for the call log that you want to export.
6. Do either of the following, and then select **Next**:
   - Enter a location for the file in the **Save exported file as** field.
   - Select **Browse** to find a location for the file.
7. If you want to save the configuration, enter a name in the field.
8. Select **Next** to export the log.
9. Select **Close**.

> NOTE *View the call log files using the appropriate application, for example, Microsoft Excel.*

Troubleshooting warning log entries

The following is a list of potential warnings that may be noted in the System Errors and Warning logs. To troubleshoot a warning, locate the log entry below, and note the possible causes of and solutions for the warning.

> NOTE *Not all errors and warnings necessarily require action.*

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Log Entry	Possible Causes and Solutions
System did not receive Caller ID information from the modem and hence, could not transmit it to your pager. Ensure that your phone rings at least twice before answering otherwise you will not receive Caller ID information.	Verify that Caller ID is available when attempting to send a pager notification which includes sending the Caller ID.
Failed to update %s's database with the received fax. The fax will be saved instead to the default mailbox.	There was a problem communicating with the database defined in the Receive Fax element. Check your database connection parameters, and ensure that the database is available.
The data source, %s, referenced in the element, %s, is unknown.	ServiceStateMachine when an element refers to a data source that no longer exists. Verify the following: 1. The ODBC data source, if applicable, is correctly configured 2. The fields in the reference data source may have been changed or deleted. Verify the data source configuration.

Accessing Documentation and Training

If you want more information than what is available in this manual or in the online help, then go to the ADTRAN Support Community website at (https://supportforums.adtran.com). Here you will find training materials, and a quick reference card, along with SIP phone user guides.

Accessing Technical Support

Unless there is a support contract in place, please see your reseller for support information. For more information on ADTRAN Technical Support, refer to the ADTRAN website at www.adtran.com.

If you are contacting ADTRAN Technical Support, then please ensure that you have the following information readily available.

- Product edition (Standard, SIP, or CEBP)
- Product version
- Service code

The Service code is an identification number to be used when contacting ADTRAN Technical Support. If you are contacting ADTRAN Technical Support then you will need to enter the service code number over the phone, so have the number ready when you call. The service contract type and expiry date are available for your information.

To access the NetVanta UC Server product and service information

From the NetVanta UC Server select Help > About UC Client. Alternatively, select the ? button on the

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toolbar.

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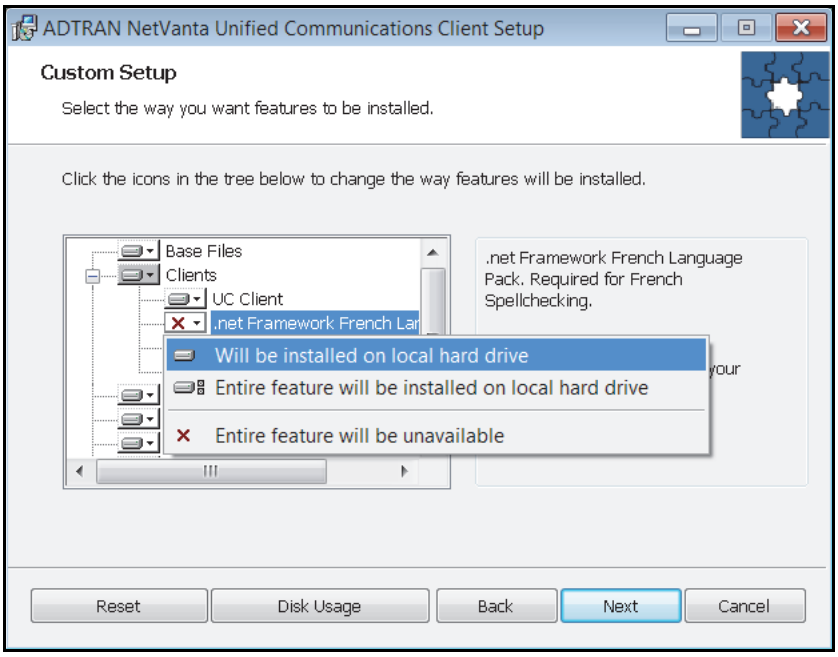
Appendix A - Installing the NetVanta UC Client Application

To install the NetVanta UC Client application, follow these steps:

1. Navigate to the folder that contains the NetVanta UC Server software that you downloaded and double-click **CAAutoRun.exe**.
2. In the **NetVanta Unified Communications CD Menu** window that appears, select the **Install Client** button.
3. Select **Next**. The **End User License Agreement** (EULA) will appear.
4. Read the EULA carefully. If you agree to the terms in the EULA, select the I accept the terms in the License Agreement checkbox and select **Next**. The **Custom Setup** menu will appear.
5. The **Custom Setup** menu allows you to determine which components are installed on the client computer. It is recommended that you install all of the default components. If you would like to use the French spell checker function available in the ucCompanion instant messaging feature, select the plus symbol next the **Clients** to expand the components of the **Clients** feature. Then, select the down arrow next to the red **X** next to **.net Framework French Language Pack**, and select **Will be installed on local hard drive** from the drop down menu. After you have selected all of the components you want to install on the client computer, select **Next**.



6. In the menu that appears, select **Install**.
7. Wait while the program files are copied to your computer. The **Setup Complete** menu appears when the NetVanta UC Client application is installed.
8. Select **Finish**.

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