



**NetVanta Unified Communications**

**NetVanta Enterprise Communications and  
Business Application Server**

**Personal Assistant User Guide**

**Version 5.5**

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## Conventions



*Notes provide additional useful information.*



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



*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 <sup>®</sup> Windows Server <sup>®</sup> 2008 operating system version R2 or later<br><b>or</b> Windows Server 2008 R2 or later  |
| Server Software   | NetVanta Unified Communications Server software <b>or</b> NetVanta UC Server software<br>NetVanta Unified Communications Live Attendant Server or Live Attendant Server  |
| Client Software   | NetVanta Unified Communications Client software <b>or</b> NetVanta UC Client software<br>NetVanta ucCompanion Desktop Presence client software <b>or</b> ucCompanion<br>NetVanta ucCompanion Live Attendant or Live Attendant<br>NetVanta ucCompanion Soft Phone or Soft Phone   |
| Hardware  | Server computer - the computer on which the server software is installed.<br>Client computer - the computer on which the client software is installed.   |
| NetVanta Unified Communication Products   | NetVanta Unified Communications Server <b>or</b> NetVanta UC Server<br>NetVanta Business Communications System <b>or</b> NetVanta BCS<br>NetVanta Enterprise Communications Server <b>or</b> NetVanta ECS<br>NetVanta Business Application Server <b>or</b> NetVanta BAS<br>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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# 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: This chapter introduces the NetVanta Unified Communications Server application in Personal 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 12*
- *Accessing your Mailbox for the First Time on page 13*

## Overview

The NetVanta 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 attendant 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.

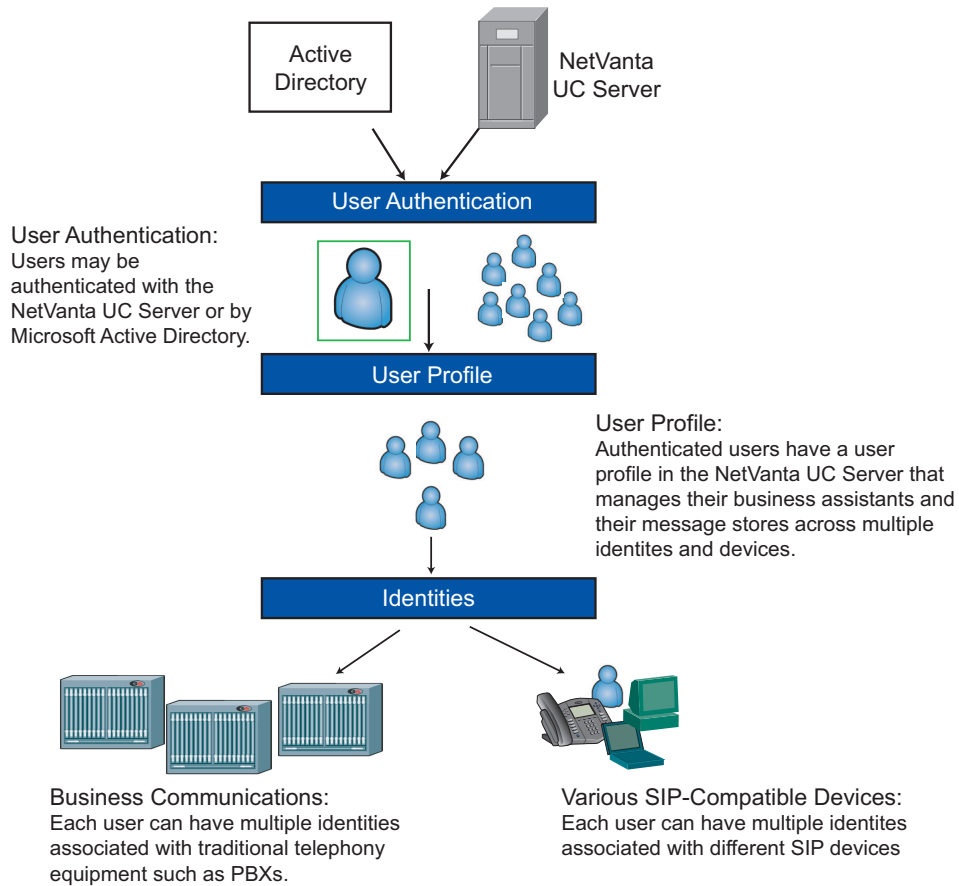
NetVanta UC Server in Personal Assistant mode provides the most commonly used unified communications features. Master the basic functions and manage your personal greetings and delivery features with efficiency and ease, right from your desktop. The user interface is remarkably user-friendly.

The NetVanta 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.

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



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 NetVanta UC Server is integrated with Active Directory.

**NOTE** *For more information about the NetVanta UC Server, refer to the ADTRAN website at <https://supportforums.adtran.com>. Here you will find reference materials, a quick reference card, and SIP phone user guides.*



# 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



## Requirements

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

- The name of the server to which to connect
- The NetVanta 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 3200.
3. Select **UC Client** and the Choose NetVanta UC Server dialog box opens.
4. Type the NetVanta 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

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



*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 <https://supportforums.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.

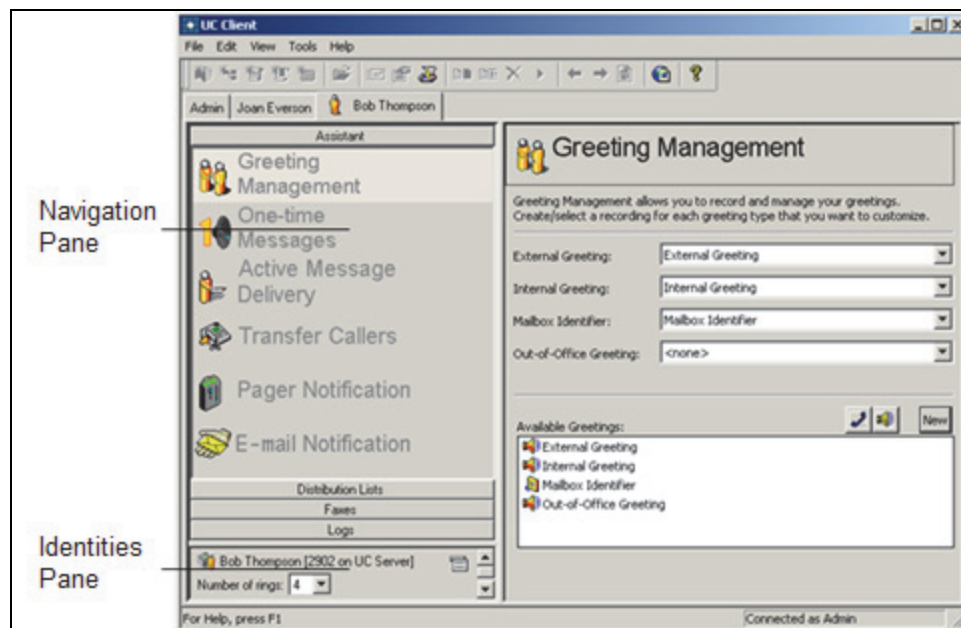
In the text box, you can type the greeting that you want to record. This is useful for eliminating pauses when you record.

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



*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 NetVanta 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 NetVanta UC Server access number.
2. Enter your password followed by #. You are prompted to change your password.



*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.



*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 NetVanta UC Server as the auto attendant.
2. At the prompt, press the system-defined key used to perform remote mailbox management.
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.



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



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

## 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 15](#)
- [Customizing your Mailbox using your Computer on page 20](#)

### 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 41](#).

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.

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 15](#).

### 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



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



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



## 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:

|                 |  |
|-----------------|--|
| <b>Disabled</b> | No message summary is provided.  |
| <b>Quick</b>    | The message summary provides limited information. For example, “You have five new messages and six saved messages.” This is the default mode.                            |
| <b>Verbose</b>  | 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.

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 103](#).

### 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.

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

## 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.



*For more information on setting mailbox options from your computer, refer to [Customizing your Mailbox on page 110](#).*

### 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

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



*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.

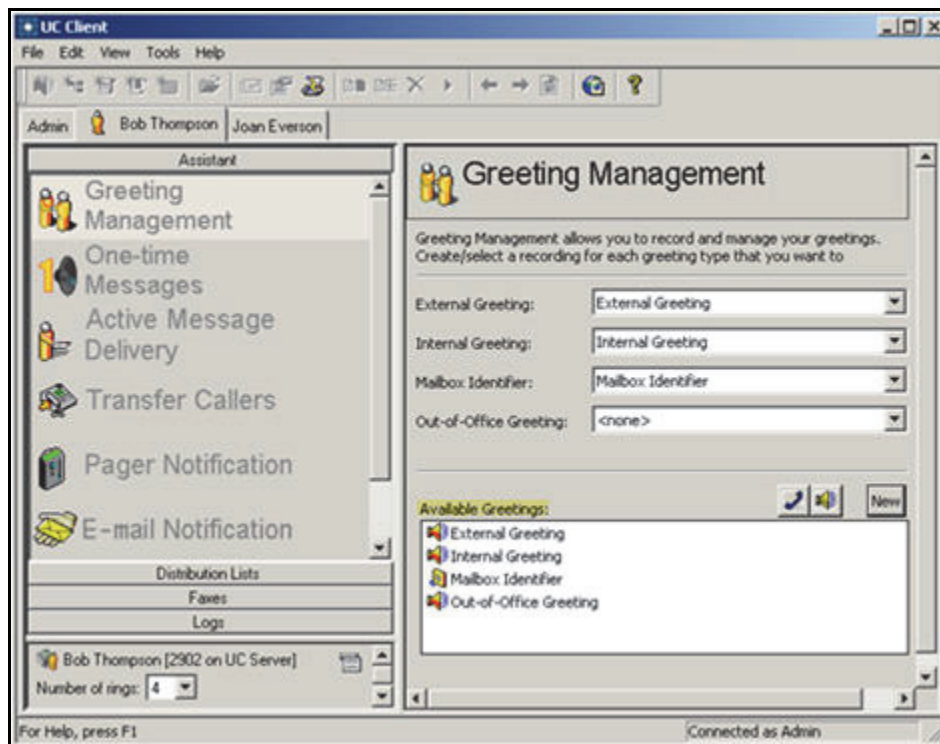
For information about managing greetings using the telephone, refer to [Managing Messages using your Telephone on page 41](#).

#### 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.

**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**.



*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 141](#).

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



*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



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



*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.



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

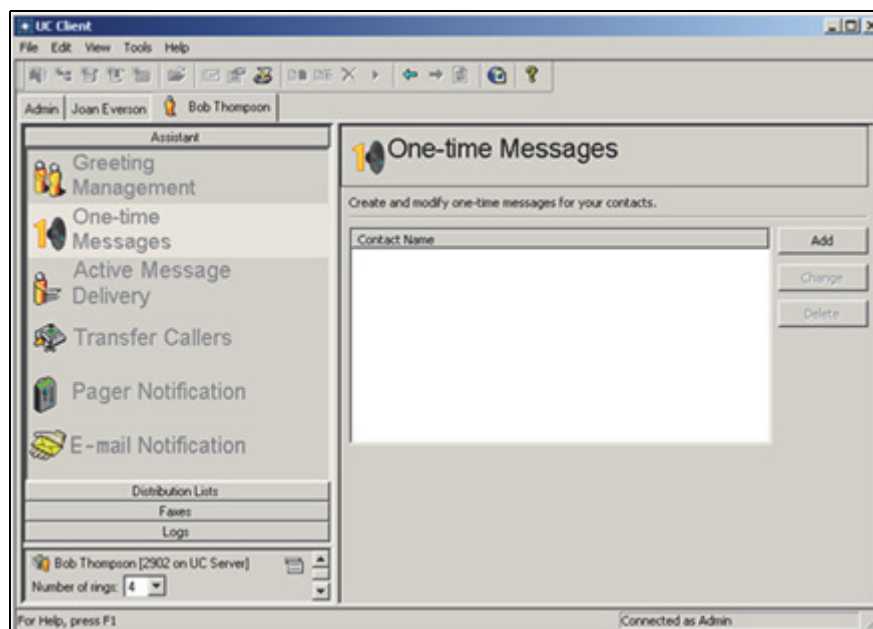
## Recording one-time messages

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.

### 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.

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.



*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 26](#).
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.



## 3 Customizing Incoming Call Options

### Overview

This section explains how to manage identities. This section explains how to use NetVanta 3200 voice message features on your user extension. These include features used to notify you about messages, and transferring calls based on conditions you specify, such as specific callers or time of day. It also includes information about how to manage extensions and identities.

You manage all voice message features using the main window or the 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.

This section covers the following topics:

- *Specifying Callers on page 29*
- *Setting Time and Day Restrictions on page 31*
- *Using Account Codes on page 31*
- *Transferring Callers on page 31*
- *Setting up Call Notification Options on page 33*
- *Managing Extensions and Identities Options on page 38*

### Specifying Callers

The notification options, and the transfer calls option, allow you to specify callers whose calls or messages you want transferred or delivered to you. Follow the same procedure for each feature after you open its content pane.

You can specify callers from within your Contacts list in Outlook, or enter numbers individually if they are not on your Contacts list.



*Unless you specify callers, the NetVanta UC Server forwards/delivers all calls/messages to you if a notification option is enabled.*

#### To specify callers from your Outlook Contacts list

1. In any of the notification option panes, enable the **Specific callers** check box.
2. Select the down arrow to access your Outlook Contacts list.
3. Select a contact. The contact appears in the large text box.
4. Repeat step 3 to add other contacts.

5. Select **Apply**. Messages from selected contacts are delivered or forwarded to you, depending on the feature you are using.

### To specify callers who are not on your Outlook Contacts list

1. In any of the notification option panes, enable the **Specific callers** check box.
2. Select the telephone icon.



*You can also type the telephone number directly into the text box.*

3. Type a phone number in the **Telephone number** text box.
4. Select **OK**. The number that you specified appears in the large text box.
5. Repeat steps 2 to 4 to add other numbers to the list.
6. Select **Apply**. The NetVanta UC Server forwards calls or delivers messages whose caller ID matches any of the numbers that you specify.

### To delete a phone number from the list of numbers that you specified for a notification option

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

## Synchronizing contacts

The Synchronize contacts option 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 these client-side contact databases, so in order to perform real-time contact matching this contact information must be copied and stored on the NetVanta UC Server. Client-side contacts are synchronized with the information stored on the NetVanta UC Server every time a user starts the NetVanta 3200 and when the NetVanta 3200 is shut down. If a user makes changes to their client-side contact database while the NetVanta 3200 is open, and they want the NetVanta UC Server to recognize these changes without having to shut-down and restart the NetVanta 3200, the user can force a contact synchronization by using the Tools > Synchronize contacts menu option.

### To synchronize contacts from a user's computer to the NetVanta UC Server

Select **Tools > Synchronize contacts**.

## Setting Time and Day Restrictions

You can set time and day restrictions for any notification option. Follow the same procedures for each feature after you open the content pane.

### To set time and day restrictions

1. In any of the notification option panes, enable the **On time and day** check box.
2. Highlight the hour in the first text box. Using a 24-hour clock, type the hour when you want the time restriction to begin. Do the same for the minutes, if required. The time restriction starts at this time.
3. Highlight the hour in the second text box. Using a 24-hour clock, type the hour when you want the time restriction to end. Do the same for the minutes, if required. The time restriction ends at this time.
4. Select the check boxes for the days of the week when you want the notification option to be enabled.
5. Select **Apply**.

## Using Account Codes

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 also ensure security because 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 trunk service. If the NetVanta UC Server administrator has enabled the account codes option, you can specify the account that you want callers to use.

### To specify a default account code for a notification option

1. In any of the notification option panes, enable the Deliver, Transfer, or Notify check box.
2. Select the telephone icon.
3. In the Enter Phone Number box, enable the Use account code check box.
4. Type an account code in the text box.
5. Select **OK**.

## Transferring Callers

The Transfer Callers option transfers callers to a telephone number that you specify. This option is useful if you are out of the office and want to make sure that you receive an important phone call.

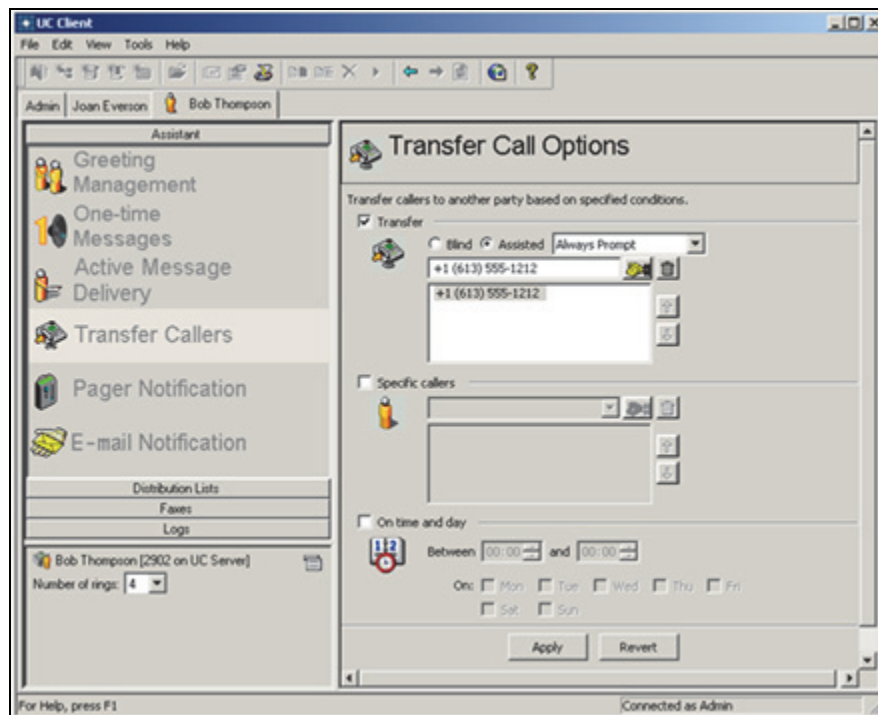
You can specify a target phone number, to which callers are transferred, and the type of transfer. Specifying an assisted transfer allows the call recipient to accept or deny a call based on the caller's recorded name. The default transfer type is a blind transfer, in which callers are transferred directly to the call recipient.

**NOTE**

*To specify callers, set time and day restrictions, or use account codes, refer to the following sections, [Specifying Callers on page 29](#), [Setting Time and Day Restrictions on page 31](#), and [Using Account Codes on page 31](#).*

## To enable Transfer Callers and specify a target phone number

1. On the Assistant navigation pane, select Transfer Callers to open the Transfer Callers content pane.



2. Enable the **Transfer** check box to enable Transfer Callers.
3. Type a phone number in the **Target phone number** text box. The NetVanta UC Server transfers your calls to that number.

## To specify the type of transfer

1. Enable the **Transfer** check box to enable Transfer Callers.
2. Do one of the following:
  - Enable the **Blind** button for a blind transfer—callers are transferred directly
  - Enable the **Assisted** button for an assisted transfer



3. If you enabled the Assisted button, select a transfer type from the list:
  - **Never Prompt**—callers are not prompted to record a name
  - **Always Prompt**—every caller is prompted to record a name
  - **Prompt Unknown Caller**—only callers not in the recipient's contact list are prompted to record a name

## Setting up Call Notification Options

There are three notification options:

- *Active Message Delivery on page 33*
- *Pager Notification on page 35*
- *Email Notification on page 37*

When the notification options are enabled, the NetVanta UC Server notifies you when you have received messages.

You can customize the notification options so that the NetVanta UC Server notifies you about calls or messages only from certain telephone numbers. Note that your office must have caller ID to be able to use some of these features. You can also be notified about calls or messages based on the time or day.

### Active Message Delivery

Active Message Delivery, when enabled for your user profile, notifies you that you have received a voicemail or fax message directly from a caller, or forwarded from another user. When the callers that you have specified leave a voice or fax message, you can be notified. You can also specify the days and times during which you want to be notified.

When Active Message Delivery is enabled, the NetVanta UC Server calls you and informs you that you have new messages. The NetVanta UC Server then prompts you for your mailbox password. You can then manage your messages.

If you have multiple telephone numbers entered in the Deliver box, and the first number on the list is not answered, or the call is declined, the NetVanta UC Server tries the next number on the list.

Active Message Delivery is useful for service organizations such as call centers. For example, if a call comes into a technical support line, and the first support technician is unavailable, then the call can be rerouted to the next number on the list (another available technician), or to a manager, in order, to locate a person available to answer the call.

Using Active Message Delivery, you can select who to send calls to, in what order, the number of attempts to contact a user, and the amount of time between attempts. For example, you can select that a call comes into your work number first, then your cell number, and if the call is still unanswered, then the call is routed to your home number.

The target phone number that you specify for Active Message Delivery is the number that the NetVanta

UC Server uses to call you to notify you that you have a message. Specify several target phone numbers in the order that you want the NetVanta UC Server to try them.

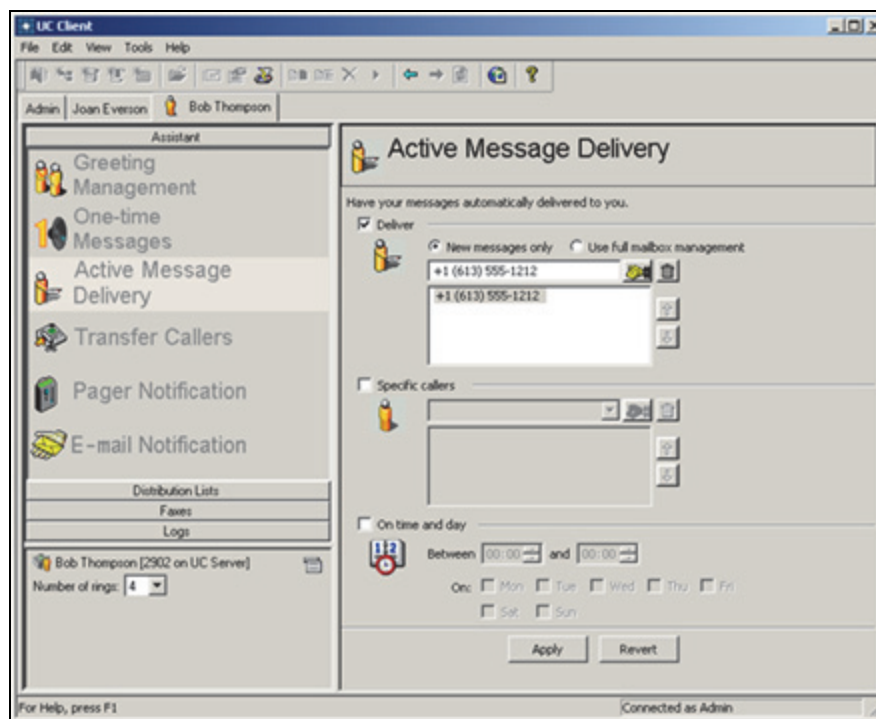
You can also cancel Active Message Delivery by specifying certain conditions. When the condition is met, Active Message Delivery is canceled. If the NetVanta UC Server is between calls, Active Message Delivery is discontinued, and no further attempts are made. If an outgoing call is already in progress, that call continues until completion. For example, if a message is retrieved through voicemail, Outlook, Lotus Notes, or an Instant Messaging client, then Active Message Delivery stops, so that no further attempts are made to contact a user.



*To specify callers, set time and day restrictions, or use account codes, refer to the following sections, [Specifying Callers on page 29](#), [Setting Time and Day Restrictions on page 31](#), and [Using Account Codes on page 31](#).*

## To use Active Message Delivery

1. On the Assistant navigation pane, select the Active Message Delivery icon to open the Active Message Delivery content pane.



2. Enable the **Deliver** check box to enable Active Message Delivery.
3. Select **New messages only**, if you want the NetVanta UC Server to deliver only new messages. Use full mailbox management instructs for the NetVanta UC Server to deliver all your messages. You have full access to your messages, as you do when you call in to check them, except that the NetVanta UC Server calls you.
4. Select **Apply**.

### To specify target phone numbers for Active Message Delivery

1. Select the **telephone** icon.



*You can also type the telephone number directly into the text box.*

2. In the Enter Phone Number dialog box, type the area code and telephone number that you want the NetVanta UC Server to use to call you.
3. From the Country code list, select the country, and select **OK**. Repeat steps 1 to 3 to add more target numbers to your list. The NetVanta UC Server calls each number in the list, in the order that you specify, until it reaches you.
4. Select **Apply**.

### To change the sequence of target phone numbers listed for Active Message Delivery

1. In the Active Message Delivery pane, select the telephone number whose position in the list you want to change.
2. Select an arrow to move the number up or down within the list.
3. Select **Apply**.

### To delete a target phone number from the list for Active Message Delivery

1. In the Active Message Delivery pane, select the telephone number that you want to delete.
2. Select the **trash** icon.
3. Select **Apply**.

### 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

## Pager Notification

When you receive a message, the NetVanta UC Server pages you using a supported paging system. If it is

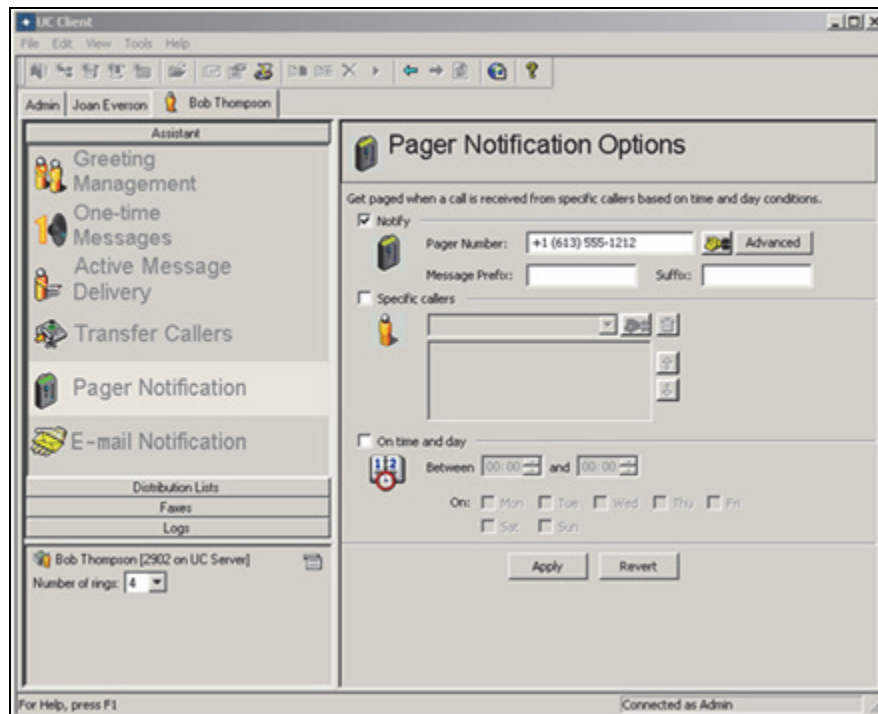
available, caller ID information from the call is transmitted to the paging system.



*To specify callers, set time and day restrictions, or use account codes, refer to the following sections, [Specifying Callers on page 29](#), [Setting Time and Day Restrictions on page 31](#), and [Using Account Codes on page 31](#).*

## To use Pager Notification

1. In the Assistant navigation pane, select **Pager Notification** to open the Pager Notification Options content pane.



2. Enable the **Notify** check box to enable Pager Notification.
3. Select the telephone icon.



*You can also type the telephone number directly into the text box.*

4. In the **Telephone number** text box, type the pager phone number and then select **OK**.
5. In the Message Prefix box, type information that will be part of the message sent before caller ID is displayed on your pager. Numeric prefixes and suffixes are useful for identifying calls that the NetVanta UC Server delivers. The prefix helps you differentiate between callers whose messages you have instructed the NetVanta UC Server to deliver, and other callers to your paging system. For example, you can use a prefix such as **123** or **000** to signal NetVanta UC Server deliveries.

6. In the Message Suffix box, type information that will be part of the messages sent following any caller ID information displayed on your pager.
7. Select **Apply**.

### To set advanced Pager Notification options

1. In the Pager Notification content pane, select **Advanced**.
2. In the **Delay after dialing** text box, type a number. This is the number of seconds of delay that you want to occur before tones have been sent to the paging system after the NetVanta UC Server has dialed the phone number.
3. In the **Tones to send before message** text box, type any DTMF tones that must be issued before a message is sent. Centralized paging systems require that users enter specific information before a message is sent. For example, you might have to enter a Personal Identification Number. If your number were **454501**, you would enter these digits in the **Tones to send before message** text box.
4. In the **Tones to send after message** text box, type any DTMF tones that must be issued after the message has been sent. Centralized paging systems require that users enter specific information after a message is sent. For example, you might have to enter a symbol, such as **#**. Enter the appropriate information in the **Tones to send before message** text box.
5. Select **OK** and then select **Apply**.

## Email Notification

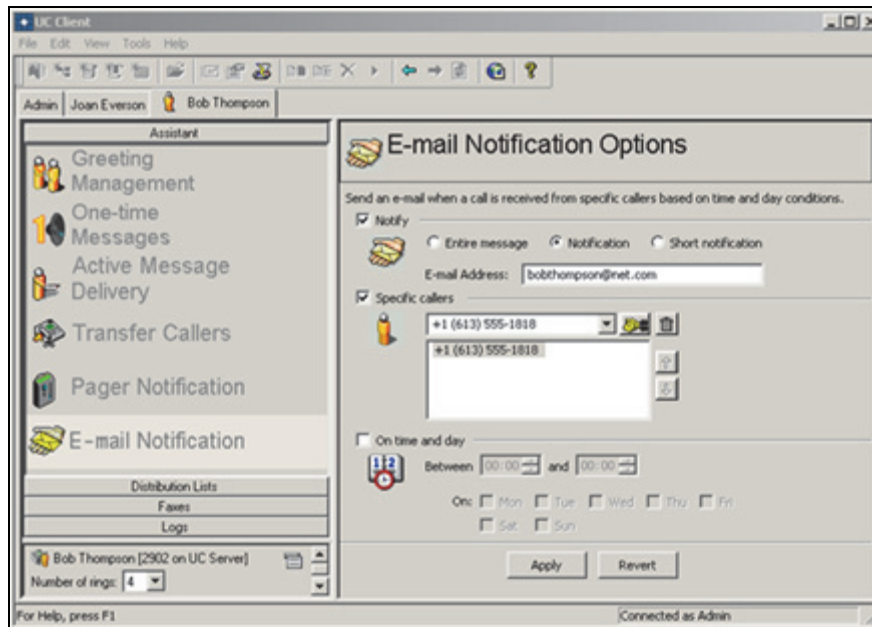
When a message arrives, the NetVanta UC Server notifies you at the email address that you specify.



*To specify callers, set time and day restrictions, or use account codes, refer to the following sections, [Specifying Callers on page 29](#), [Setting Time and Day Restrictions on page 31](#), and [Using Account Codes on page 31](#).*

## To use Email Notification

1. In the Assistant navigation pane, select **Email Notification** to open the Email Notification Options content pane.

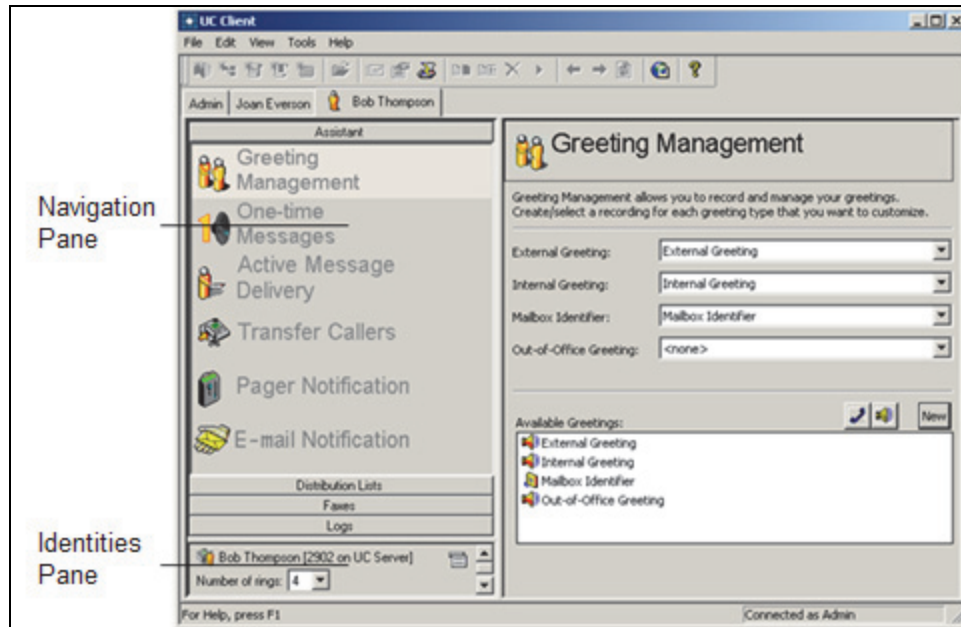


2. Enable the **Notify** check box to enable Email Notification.
3. Enable one of the following options:
  - **Entire Message**
  - **Notification**
  - **Short Notification**
4. Select **Apply**.

## 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 view the SIP Authentication



Active Service icon

1. On the Identities pane, select the active service icon.
2. Select **SIP Authentication**. You can view your user name and password. The Administrator needs this information to assign a phone to an identity.





## 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 41*
- *Accessing your Mailbox using your Telephone on page 41*
- *Listening to Messages Remotely on page 41*
- *Sending Messages from your Mailbox on page 43*
- *Caller Options on page 47*

### 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.

### 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**

|            |                              |
|------------|------------------------------|
| <b>1,1</b> | to review new messages       |
| <b>1,2</b> | to review new voice messages |
| <b>1,3</b> | to review new email messages |
| <b>1</b>   | to review all messages       |
| <b>2</b>   | to send a message            |
| <b>4</b>   | to change mailbox options    |
| <b>5</b>   | to search contacts           |
| <b>*</b>   | 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**

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



*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**

|          |                             |
|----------|-----------------------------|
| <b>3</b> | to forward                  |
| <b>4</b> | to replay                   |
| <b>5</b> | to play message information |
| <b>7</b> | to delete                   |
| <b>8</b> | to reply to messages        |
| <b>9</b> | to save                     |
| <b>#</b> | skip message                |
| <b>0</b> | 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**

|          |           |
|----------|-----------|
| <b>1</b> | keep      |
| <b>2</b> | re-record |
| <b>3</b> | listen    |
| <b>*</b> | 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 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.



*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 43*:
  - 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

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 43*:
  - 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.



*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.



*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.

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**

|          |           |
|----------|-----------|
| <b>1</b> | deliver   |
| <b>2</b> | re-record |
| <b>3</b> | listen    |
| <b>4</b> | append    |
| <b>5</b> | discard   |
| <b>*</b> | 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 #.



*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.

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



*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.

### To bypass a greeting

Press # while listening to a greeting.



*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.”



*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 43](#). 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.”



*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.



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



## 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:

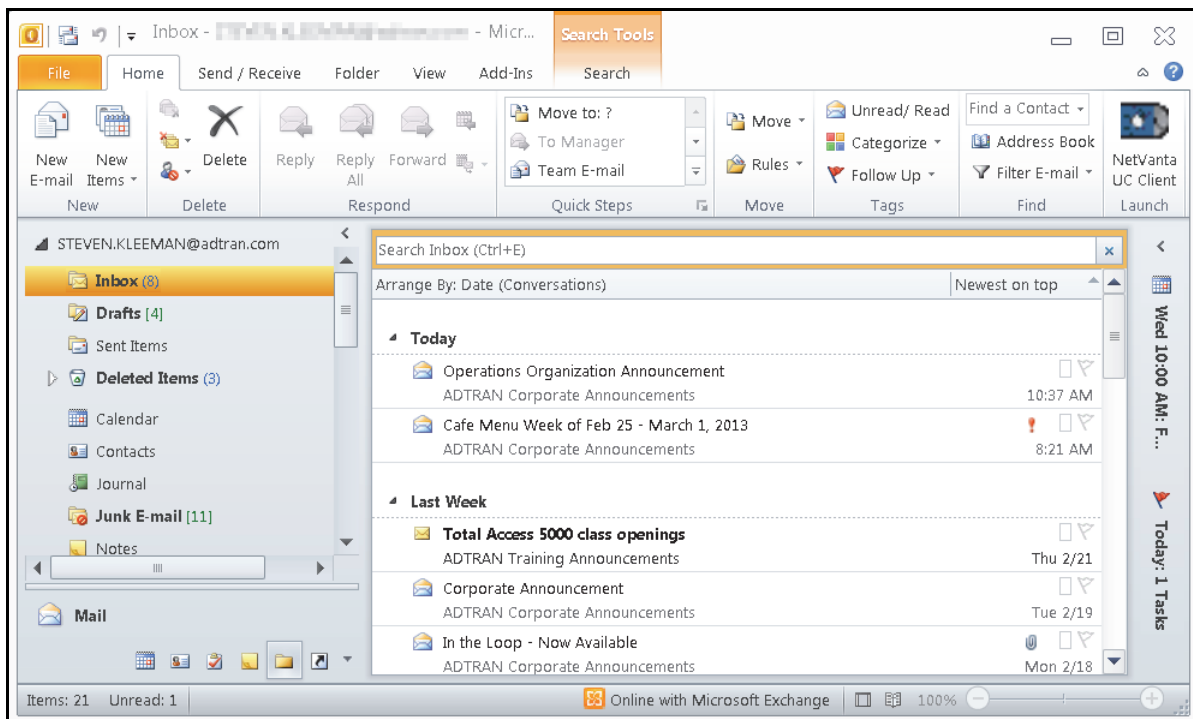
- [Overview on page 49](#)
- [Managing Messages in Microsoft Outlook on page 49](#)
- [Managing Messages in Lotus Notes on page 55](#)
- [Managing Messages in the Mailboxes Menu in NetVanta UC Client on page 61](#)

### 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:



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.



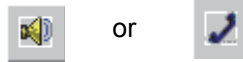
Audio commands

Speaker icons

Sliding volume control

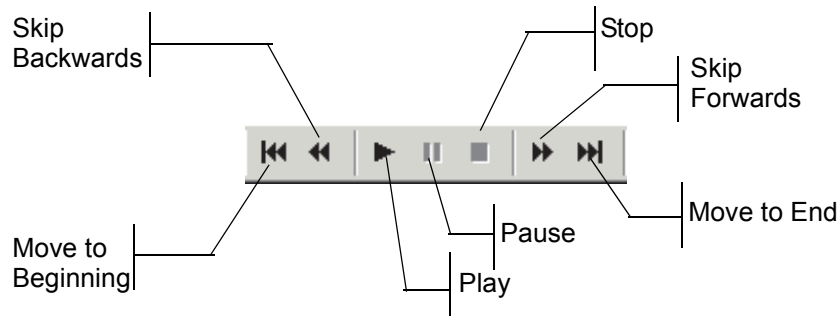
Connection state

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



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

3. Select 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**.

**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.

Wave form

Text area

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.



*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**.

### 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.

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.

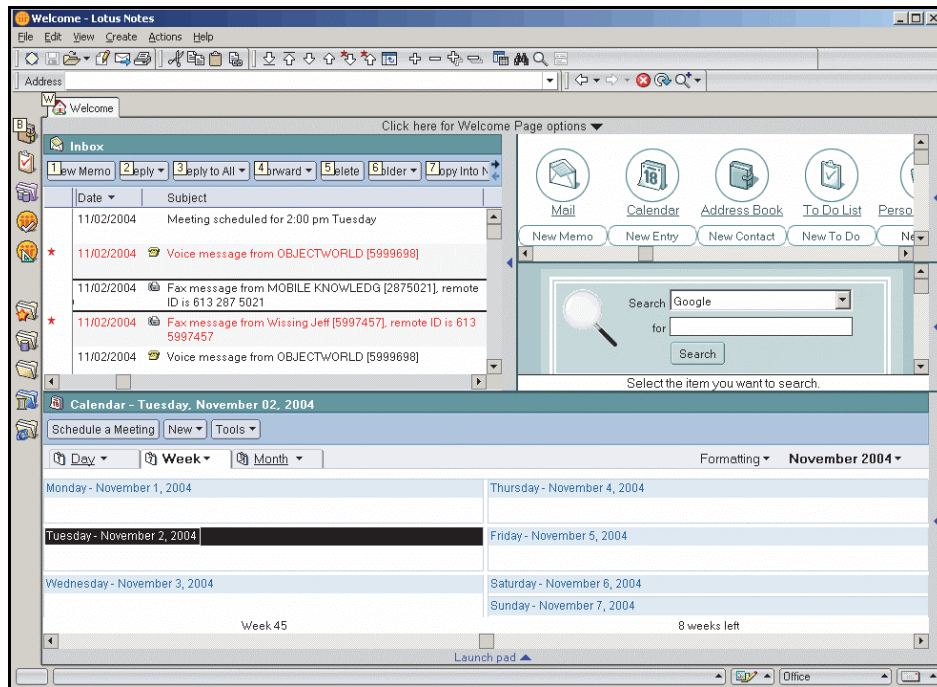
Lotus Notes users can view voice messages in their inbox and can play voice messages through either a computer sound card or over the telephone. Lotus Notes users can also view fax messages without opening additional programs.

### 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.

**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



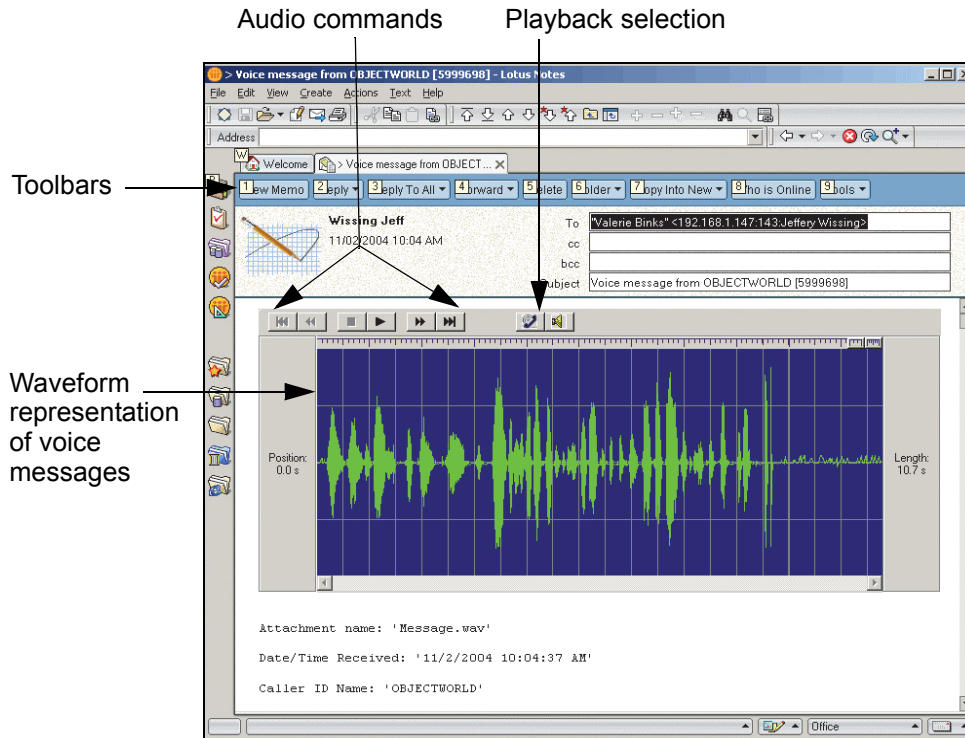
Fax icon



## 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.

**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**

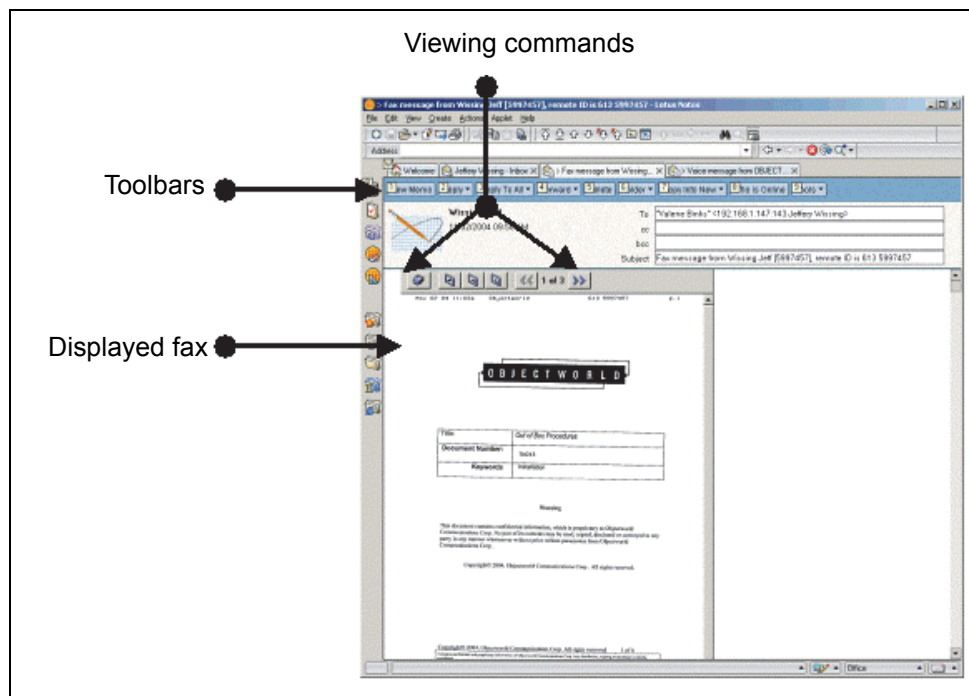
1. Select **Forward**.
2. Select one of the following:
  - Forward
  - Forward without Attachment(s)
  - Forward with Internet-Style History
3. enter the email address to which you want to forward the memo.
4. If you want to add a message, enter it in the message area.
5. Select **Send**. If you want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



## Sent Items—Fax Transmission Reports

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



*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 83](#).

## 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.

### 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.

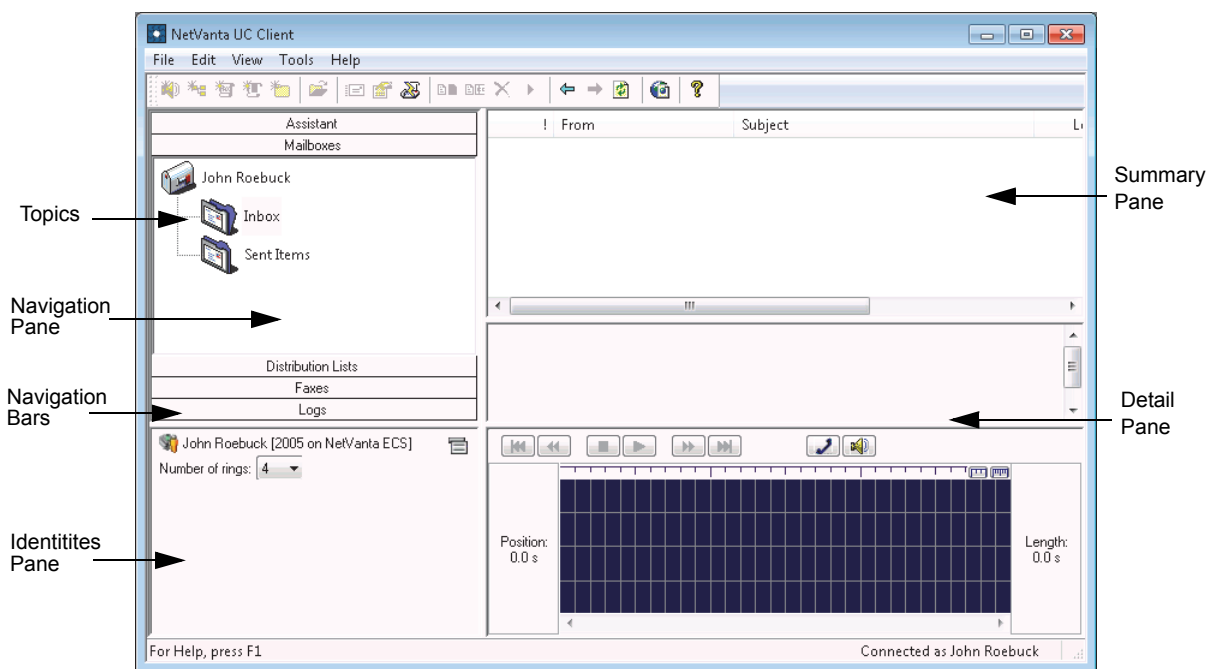
### To change your IMAP4 password in the NetVanta UC Server

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.

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**.

**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.

### 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.





## 6. Using SIP Telephones

SIP-enabled phones, in conjunction with the NetVanta UC Server, offer a wide range of phone features, such as call park/pickup, overhead paging, auto attendant, single button voicemail access, caller ID, conferencing, hunt groups, ring groups, message waiting indicator, music on hold, and more.

The NetVanta UC Server works with many types of SIP-compliant phones. However, phones from different manufacturers are configured differently, and the phone features are accessed in different ways.



*This chapter does not replace individual phone installation and configuration manuals. SIP telephone user guides for manufacturers that are part of the ADTRAN Connect or Connect PLUS program are available on the ADTRAN website [www.adtran.com/support](http://www.adtran.com/support). Refer to the SIP user guide for information about how to use the phone with the NetVanta UC Server.*

This chapter presents the basics of using SIP telephones, and includes the following topics:

- [Customizing Your Phone on page 65](#)
- [Using SIP Phones on page 66](#)

### Customizing Your Phone

In the NetVanta UC Server you can customize your phone to suit your personal preferences. For example, you can set the number of rings before your phone goes to voicemail. You can also set how the message waiting indicator on your phone operates. For example, whether the message waiting indicator on your phone turns off when you've accessed your first new voicemail message, or when you've accessed all your new voicemail messages. You can also customize your phone according to your particular phone's make and model. For information on customizing your phone in the NetVanta UC Server, refer to the following sections.

- [Changing the Number of Rings Before Calls Transfer to Voicemail on page 65](#)
- [Setting the Message Waiting Indicator on Your Phone on page 66](#)

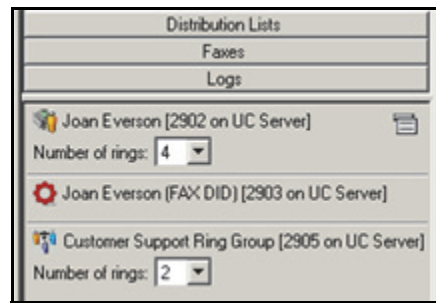


*For more information on customizing your phone, refer to the phone user guide that applies to the make and model of your phone. User guides for ADTRAN supported phones are available from the ADTRAN website at [www.adtran.com/support](http://www.adtran.com/support).*

### Changing the Number of Rings Before Calls Transfer to Voicemail

You can change the number of times a call rings on your extension, before the call is directed to voicemail.

An identity refers to a user extension, an auto attendant, or an email address. The administrator creates and assigns identities for you, which typically refer to your extension numbers. If you have identities assigned, they appear in the identities pane, on the bottom-left of the NetVanta UC Client window.



### To change the number of rings

On the identities pane, select the identity that you want to change, and select the **Number of rings** from the drop-down menu. The default number of rings is 4.

## Setting the Message Waiting Indicator on Your Phone

Through the NetVanta UC Client, you can set how the message waiting indicator on your phone operates.

### To set the message waiting indicator on your phone

1. Select **Tools > Options**.
2. In the **General** tab, select one of the following options.

**Use system defaults**

The message waiting indicator behavior for your phone is set according to the system-wide setting set by your administrator.

**Never turn on or off**

NetVanta UC Server does not manage the message waiting indicator.

**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.

**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**.



*Any changes to the message waiting indicator options take effect immediately.*

## Using SIP Phones

Depending on the manufacturer, SIP phones and the NetVanta UC Server offer a variety of features, such

as the following:

- *Using the Global Phone Directory on page 67*
- *Transferring Callers Directly to Voicemail on page 68*
- *Using the NetVanta UC Server Conference Bridge on page 68*
- *Paging on page 69*
- *When you are finished with the page, hang up or use the end call function on your phone. Parking Calls and Picking up Parked Calls Using Access Codes on page 70*
- *Parking Calls and Picking up Parked Calls Using Park Zone Button on page 71*
- *Working with Call Queues on page 72*
- *Picking up Ringing Calls on page 74*
- *Changing Phones During a Call on page 75*

## Using the Global Phone Directory

The Global Phone Directory uses Polycom's Corporate Directory feature to enable users of Polycom and ADTRAN IP phones to use the GUI on their phones to search for identities included in the Global Phone Directory.



*The Global Phone Directory feature is supported for all ADTRAN IP phones (except the ADTRAN IP 706 and IP 712) and Polycom IP phones using firmware 3.1.8 and higher. No other phone types are supported. Phones associated with other communication systems (such as the NetVanta 7100) are not provisioned by NetVanta UC Server, and, therefore, are outside the scope of this document.*

Users can search the Global Phone Directory database using simple and advanced searches. In a simple search, the user enters either the first name, last name, or phone number of the identity for which they are searching. In the advanced search, the user can search on one or more of the first name, last name, and phone number values.

For more information on using the Polycom Corporate Directory search feature, refer to the user manual for your phone available from the Polycom Knowledge Base at <http://support.polycom.com/>.

## Accessing Voicemail Messages

Some telephones provide a single button to access your voicemail. This is useful when accessing messages from your phone. You can press your phone's Messages button and go directly to voicemail to check your messages.

You might have one or several identities (typically extensions) assigned to your telephone. The number of buttons on the phone determines the number of possible identities that can be configured on it.

### To use the message button on a phone with one identity

4. Press the **Messages** button on your phone. Enter your telephone personal identification number (PIN) at the prompt to access your personal voicemail.

### To use the message button on a phone with more than one identity

1. Press the **Messages** button on your phone.
2. From the **Line Select** menu, select using the telephone keypad, or the arrow keys on the telephone line for which you want to review your messages.



*As long as there is a user profile associated with the identity, callers are prompted for their telephone PIN.*

### Transferring Callers Directly to Voicemail

You can transfer a caller directly to voicemail, without ringing the recipient's telephone. This feature is useful if a caller needs to leave a message for a user, but does not need to speak to the user directly. After a direct transfer, the caller hears the user's personal assistant greeting, and can follow the prompts accordingly.

#### To perform a blind transfer to another user's voicemail

1. During an active call, begin a blind transfer, which puts the caller on hold. The steps to perform a blind transfer vary depending on the type of phone you are using. For more information, refer to the user documentation for your phone.
2. Enter **\*86**<Destination mailbox number>.
3. Press **Send** or **Dial**, depending on the phone type you are using.

#### To perform a supervised transfer to another user's voicemail

1. During an active call, begin a supervised transfer, which puts the caller on consultation hold. The steps to perform a supervised transfer vary depending on the type of phone you are using. For more information, refer to the user documentation for your phone.
2. Enter **\*86**<Destination mailbox number>.
3. Press **Send** or **Dial**, depending on the phone type you are using.
4. To complete the transfer, press the **Transfer** key again.

#### To leave a message directly in a recipient's mailbox

1. Enter **\*86**<Destination mailbox number>.
2. Press **Send** or **Dial**.

### Using the NetVanta UC Server Conference Bridge

The NetVanta UC Server has the ability to support a limited-sized conference bridge application. The number of participants is limited to the number of licenses available, however additional conference expansion licenses can be purchased. See your system administrator for more details. You can use your SIP



*Any lone user in a conference bridge will hear the sound of crickets, which is confirmation that they are the only person in the conference.*

### To access the conference bridge

1. From an internal telephone, dial the conference bridge number. The default number is **7050**.



*You can also dial 7050 to access the conference bridge from the **dial by extension** or **dial by name** directory.*

2. Enter the four-digit **conference ID**.
3. Follow the prompts to access the conference bridge.



*To access the list of options, you can press \* while the conference is in progress.*

When you press \* during a conference, the following options are available. The available options depend on when during the conference you press \*.

- Press **1** to mute yourself. Response: *You are now muted.*
- Press **2** to unmute yourself. Response: *You are now unmuted.*
- Press **3** to disable entry and exit notifications. Response: *Entry and exit notifications have been disabled.*
- Press **4** to mute all other participants. Response: *All others have been muted.*



*When you press **4** to mute all participants, this does not apply to new callers who join the conference. To mute new callers, press **4** again.*

- Press **5** to unmute all other participants. Response: *All others have been unmuted.*
- Press **7** to toggle between closing and reopening the conference to additional participants. Response: *The conference is now closed to additional participants.* Response: *The conference is now reopened to additional participants.*
- Press **9** to end the conference.
- Press **0** to report the number of participants. Response: *Including yourself, there are x participants.*
- Press **#** to return to the conference.

## Paging

You can send live pages and HFAA pages. Live paging allows you to instantly broadcast a page . HFAA

pages allow you to send a bidirectional page to a single recipient. For instructions on sending recorded pages, see your system administrator.



*In order to send a live page, your system administrator must have enabled access for you to do so. For more information, see your system administrator.*

### To send a live page

1. From your phone, dial **\*72** (or **\*PA**).
2. After you hear the tone, begin speaking.
3. When you are finished with the page, hang up or use the end call function on your phone.
- 4.

### To send an HFAA page

1. From your phone, dial **\*\***
2. Dial the extension of the user you would like to page.
3. After you hear the tone, begin speaking.

## When you are finished with the page, hang up or use the end call function on your phone. **Parking Calls and Picking up Parked Calls Using Access Codes**

You can park an active call, and the parked call can be retrieved on another phone. This feature is useful if you want to change phones during a call.



*Call park/pickup must be enabled by your system administrator for use on your phone.*

There are two methods of parking calls. In one method, the NetVanta UC Server selects the next available park number. Alternatively, you can select your own park number. Having the NetVanta UC Server select the park number is useful if you are uncertain whether a call is already parked at a particular number.



*If there is more than one identity is assigned to your phone, then **Transfer** the call instead of putting it on hold.*



*If a person whose call has been parked then puts the call on hold, the person retrieving the parked call will hear dead air or silence until the other party resumes the call.*

### To park a call at the next available number

1. Place the active call on hold.



*If there is more than one identity assigned to your phone, then **Transfer** the call instead of putting it on hold.*

2. Dial **\*99**.
3. Note the **hold position** that plays over the telephone. The hold position is used by the person who answers the parked call. The NetVanta UC Server selects the park number for the caller beginning at 1 or the next available higher number.
4. Press **DIAL**. The call is removed from the hold position and put in the system park position.

### To park a call at a selected park number

1. Put the active call on hold.



*If there is more than one identity assigned to your phone, then **Transfer** the call instead of putting it on hold.*

2. Dial **\*99**.
3. Enter the number that you want to use as the park number. The hold position is used by the person who answers the parked call. For example, if you enter **1234**, then the call is parked at 1234, and can be picked up at 1234.
4. Press **DIAL**. The call is removed from the hold position and put in the park position.

### To answer a parked call

1. Typically, a company announcement informs you that a call is on hold for you.
2. Dial **\*98**. The system prompts you for the park hold position.
3. Dial the number of the park hold position. The system disconnects the current call and presents a new call.
4. Answer the new call to speak to the parked caller.



*If no one answers the parked call, the call rings the extension that originally put the call on system park.*

## Parking Calls and Picking up Parked Calls Using Park Zone Button

Calls can be parked and picked using park buttons configured on your phone by your system administrator.

Each park button is assigned to a single Park Zone, and Park Zones are shared among users in NetVanta UC Server. For example, if a user parks a call in Park Zone 1 (using either a park button assigned to Park Zone 1 or the \*99 access code), another user can retrieve the parked call from Park Zone 1 using a park button assigned to Park Zone 1 on their phone.



*If there is more than one identity assigned to your phone, then **Transfer** the call instead of putting it on hold.*



*Because each park button is assigned to a specific Park Zone, users can only use park buttons to retrieve calls from Park Zones associated with their phone's park buttons. For example, a park button assigned to Park Zone 1 cannot be used to retrieve a call parked in Park Zone 2.*

### To park a call using a park button

During a call, press a park button. The call will be parked in the Park Zone associated with the park button, and the button indicator will change from idle to busy.



*When parking a call on an ADTRAN IP phone using a Park Zone button, you must first place the call on hold then select the desired Park Zone button.*



*The label for the park button can differ depending on the description chosen by the system administrator. However, park buttons are labeled **Park** <zone> (where <zone> is the number of the Park Zone) by default.*

You can now inform the user for whom the call is parked.

### To answer a parked call using a park button

Once informed that a call is parked for you, press the park button associated with the Park Zone on which the call is parked. The button indicator will change from busy to idle.

## Working with Call Queues

Call queuing allows incoming calls to be distributed to an individual within a specified group of agents. This feature is useful for companies that handle large numbers of incoming phone calls; where the caller is not trying to reach a specific individual, but wants to speak to a member of an agent group, such as a salesperson, as quickly as possible. Call queuing allows callers to remain in a queue while they wait for their call to be answered by the appropriate agent.



*The total number of simultaneous calls that can be queued in the system is **64**.*



The agent is typically associated with a particular area of expertise, for example, sales or support. A support agent who is ready to answer calls can log into the call queue and receive support calls in a specified order, such as in order of arrival or priority.

Calls are distributed to the most idle agent. If an agent is logged in, the caller hears an introductory queue greeting. If no agents are logged in, the caller is directed to the overflow destination. The overflow destination then provides an additional greeting.

If callers know the queue number, they can dial directly into a queue.

Agents can log in or log out of a queue. Agents who log in to a queue receive calls that are directed to that queue.

**NOTE**

*The maximum number of agents that can log in to a queue at the same time is 64.*

### To subscribe to a queue

1. Dial **\*81**<QueueNumber>. Ensure that you enter the correct queue number.
2. Hang up.

**NOTE**

*To avoid errors when entering queue numbers, use speed dial to log in and out of queues without errors.*

### To unsubscribe from a queue

1. Dial **\*82**<QueueNumber>.
2. Hang up.

### To present a call to the queue

1. Dial **\*80**<QueueNumber>.
2. Hang up.

**NOTE**

*Contact your system administrator to obtain the appropriate number for your queue.*

If you are logged into a queue to accept incoming queued calls, there may be times when you wish to temporarily stop accepting queued calls without logging out of the queue. You can manually set your status to unavailable to prevent accepting further incoming queued calls, without logging out of the queue.

Temporarily setting your status to unavailable does not change your longest idle position in the agent

group. When you make yourself available again by logging back into the queue, your idle time is based on the time since your last call, including the time that you were unavailable.

### To set your agent status to unavailable

1. Dial **\*83**.
2. Press a number from **1** to **9** to indicate your reason for being unavailable.
3. Hang up.

### To set your agent status to available

1. Dial **\*83**.
2. Press **0** at the prompt.
3. Hang up.

You can check your agent status to verify whether you're currently logged into a call queue, whether your status is set to temporarily unavailable, or whether you're currently logged out of the call queue.

### To check your agent status

1. Dial **\*84**<QueueNumber>. Ensure that you enter the correct queue number.

The system will indicate your current status as:

- The agent is logged in.
- The agent is not available, service code <#>.
- The agent is not logged in.

2. Hang up.

## Picking up Ringing Calls

Ringing call pick up allows you to answer other user's ringing telephones. You can divert a ringing call from another telephone, typically within earshot, to your own telephone to answer.

To use ringing call pick up, you must know the extension of the phone that is ringing.

This feature also allows for night bell support. Many small companies have an audible bell that rings after business hours. Night bell support can also allow employees to contact security after hours. This feature can allow employees who are not stationed at a particular desk to answer any telephone.



*To use ringing call pick up, your phone must be configured to receive incoming calls. Make sure that such features as **call forwarding** and **do not disturb** are not enabled on the phone.*

## To answer a call on another user's phone

1. When you hear a phone that you want to answer, dial **\*78**<Extension> from your phone.
2. If the phone has stopped ringing by the time you dial the \*78 code, the system prompts you to enter your pickup ID.



*If the pickup ID that you enter is invalid, the system prompts you with **That is not a valid pickup ID**, and asks you to enter a valid pickup ID.*

## Changing Phones During a Call

Using connected call pickup, you can seamlessly transfer calls from one device to another. This feature is most commonly used with mobile twinning, where calls to one phone number can ring simultaneously at multiple devices, such as an internal extension number and a cell phone number. For example, if you were away from your desk and you answered a call that was transferred or twinned to your cell phone, then when you return to your desk, using the connected call pickup feature, you can pick up that call on your desk phone, without the caller being aware that you changed phones.



*To configure mobile twinning, see your system administrator.*

The benefits of using connected call pickup include using one phone number and multiple devices to be accessible to callers, while minimizing costs by then transferring calls to your internal extension or to another land line phone.

To pick up a connected call, the called number must go through the NetVanta UC Server. That is, the call must be transferred, forwarded, or twinned to your alternate phone number, for example:

- Calls can be made directly from another extension to your alternate phone number.
- Calls can be transferred by internal users to your alternate phone number.
- Calls can be transferred using the Transfer Call options available from your Personal Assistant or Personal Business Assistant to your alternate number.
- Using mobile twinning, calls can ring your alternate phone number and your internal extension simultaneously.

Unless your system administrator has configured this mode differently, you must know the phone number of the phone that answered the call, that is, the extension number or the external telephone number, in order to pickup the connected call.

Your phone must be able to receive another call, that is:

- A line must be available.
- Do not disturb (DND) must be disabled.
- Call forwarding must be disabled.



*Your system administrator may disable the connected call pickup feature due to privacy concerns.*

### **To change phones during a call**

1. From the phone to which you want to transfer the call, dial **\*27** <called phone number>. The called phone number can be an internal extension number or an external phone number, and refers to the number of the phone that answered the call. Your system administrator may configure this option so that you can only pick up connected calls from your cell phone using your desk phone. If this is the case, then dial **\*27** only. To connect the call, the phone from which you are dialing will ring.
2. Answer the ringing phone. When you answer the phone, the call automatically connects to this phone, and is dropped from the phone from which you originally answered the call. The call is transferred from one phone to another silently, so the user may be unaware that you have changed phones.

## 7. 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 77*
- *Sending Faxes on page 77*
- *Receiving Faxes on page 101*

### 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

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)

### 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.



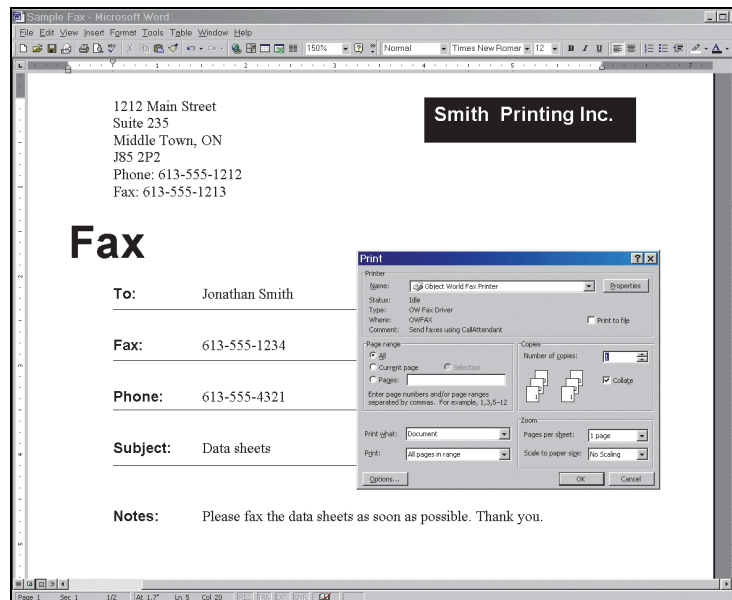
*You can send a fax cover page only using Quick Fax. For more information, refer to [To send a cover page only using Quick Fax on page 100](#).*

## 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**.
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



*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 80](#).*

6. If you select **Save to file**, refer to *To save a document as a fax on page 79*.
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.



*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**.
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.



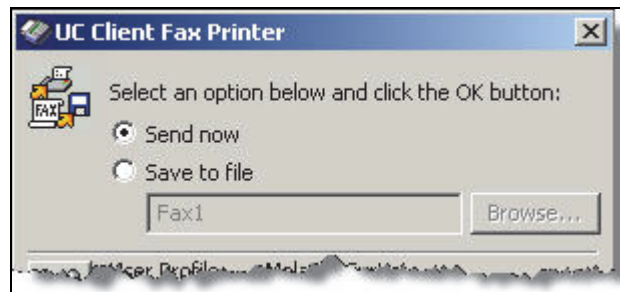
Browse Button

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.

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**.

## 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 105*.



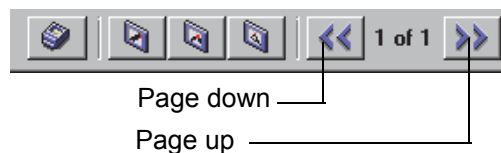
The **Faxes menu** displays a Navigation pane, summary pane, and detail pane.

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.

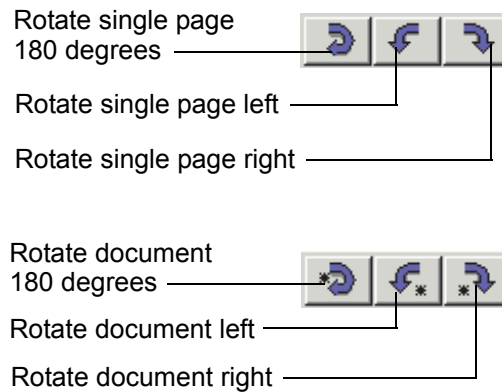
The **detail pane** provides a partial view of a fax document that you select. As you scroll through the list of available fax documents, you can view them in the detail pane.

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

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 83](#).

**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 78](#).

### 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.

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**.

## 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.

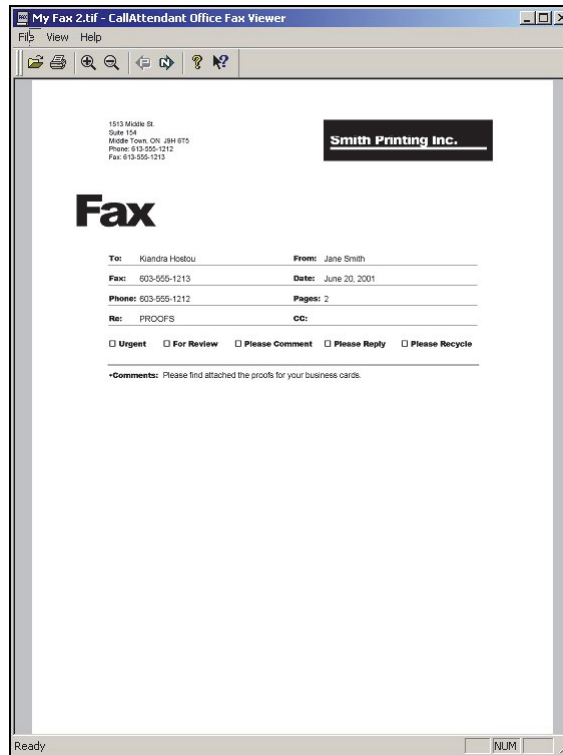
### To preview a fax document

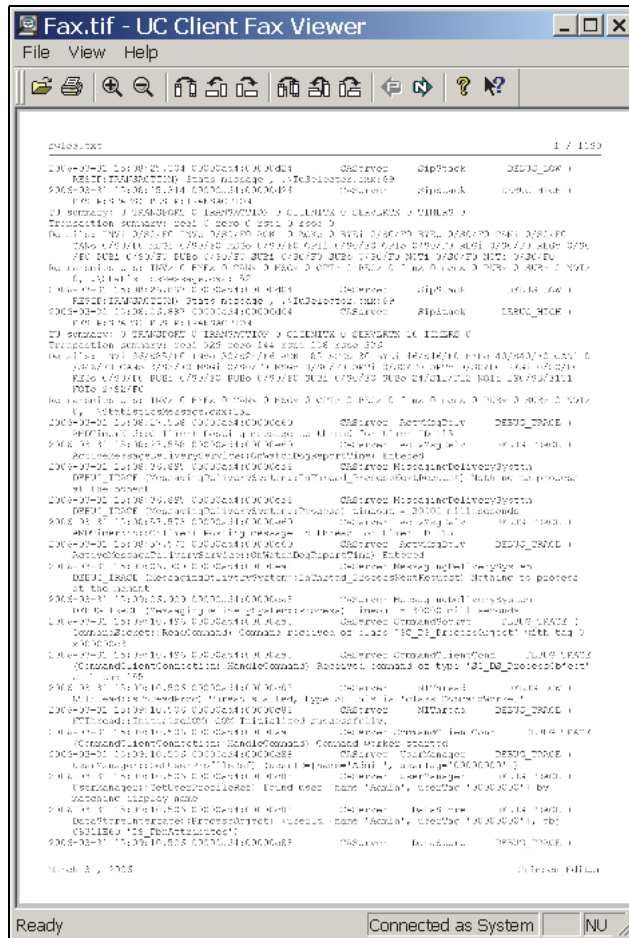
1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the fax documents folder containing the document that you want to preview. The folder's contents are listed in the summary pane.



Faxes Folder

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.



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

Previous page  Next page



*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.

### 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 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.



*Select 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.*

## 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**.



### 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.



*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.

### 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 105](#).

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.

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



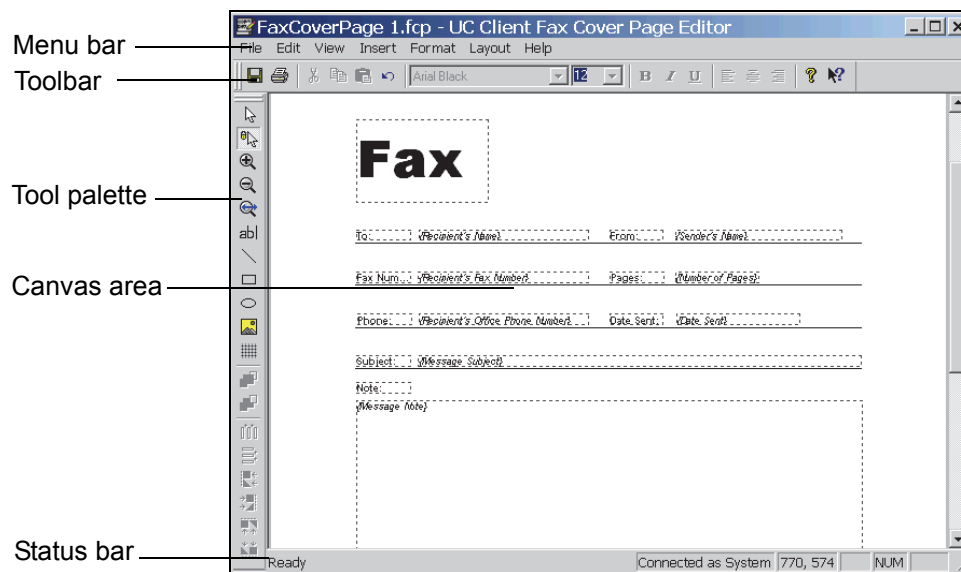
*If you do not make a copy of the cover page before you make the changes, the application permanently replaces the original cover page template with your changed copy.*

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

- From the NetVanta UC Client select the **Faxes** navigation bar to open the Faxes menu .
- 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.
- 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.

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

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 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
- 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**.

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.



*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.

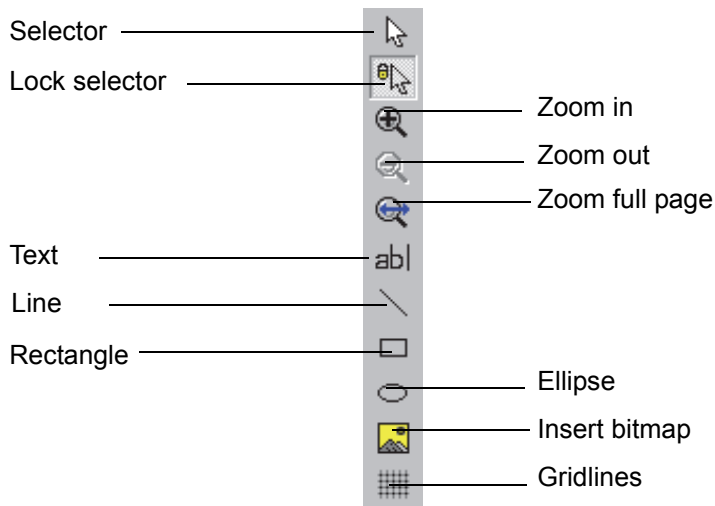


*You can change label content, but you cannot change associated field content from within the Fax Cover Page Editor. To change field content related to a specific fax transmission, you need to do so from the fax queue. Select the fax that you want to change and right-click to get a shortcut menu.*

**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.

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

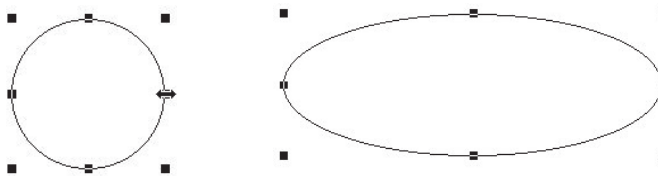
1. Select the shape to select it.
2. Drag the shape to the position that you want.



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

### 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.
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.

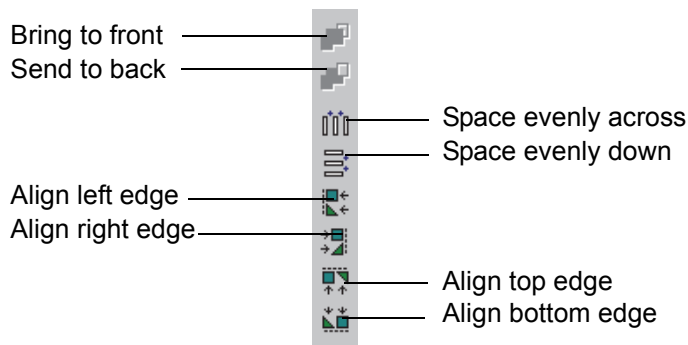


## To insert a bitmap

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.



## 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.

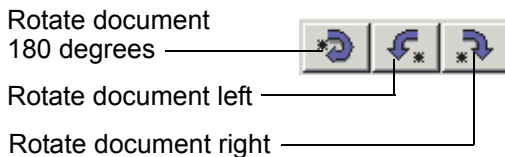
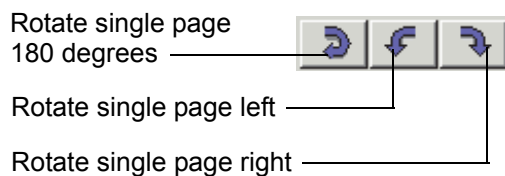
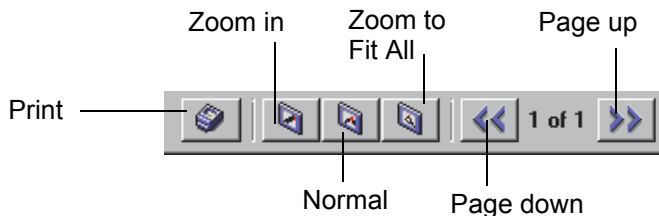


Alignment tools

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.
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.

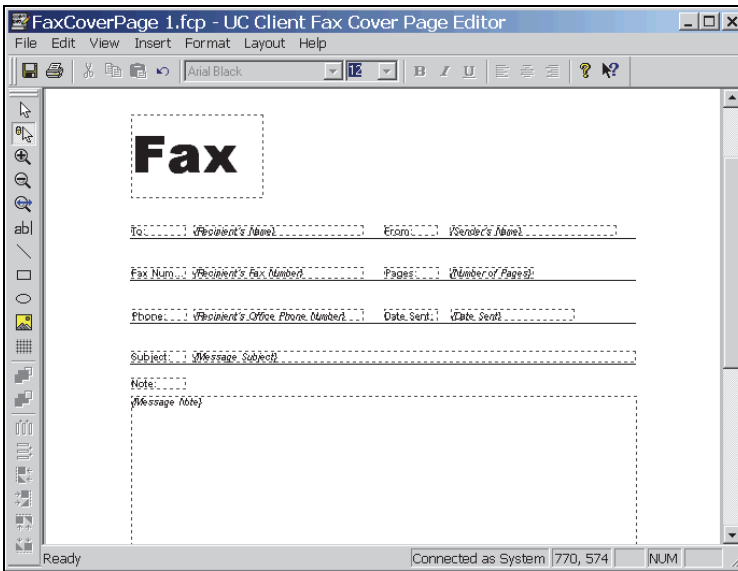
### **To delete a fax cover page**

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



*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.



*“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.



*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.

### 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.



## 8. 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 18](#).

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 104](#).
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**.

### 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 104*.
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.



## 9. Importing and Exporting

This chapter explains how to use the Import/Export Wizard and covers the following topics:

- *Overview on page 105*
- *Starting the Import/Export Wizard on page 105*
- *Importing and Exporting Items on page 105*

### 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.



*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.

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.

## 10 Setting Options

This chapter explains how to set various options. Options fall under the following categories:

- *Setting General Options on page 107*
- *Setting Message Delivery Options on page 108*
- *Customizing your Mailbox on page 110*
- *Setting Integrated Messaging Options on page 112*
- *Compressing Voice Messages on page 113*



*For more information on setting mailbox options, refer to [Customizing your Mailbox on page 15](#).*

### 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.

3. In the Time zone section, select the Time zone list.
4. From the Time zone list, select the time zone that you want.



*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**.



*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.

Message delivery options apply to the Active Message Delivery feature.

When Active Message Delivery is enabled and a message is received, the NetVanta 3200 calls a list of specified numbers until it reaches you. You can set the number of times the NetVanta 3200 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 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

## 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.

### 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.
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**.



*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**.

### 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**.



*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**.



*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.*



# 11. 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, and SIP phone user guides. For more information, refer to the following sections:

- *Troubleshooting Message Waiting Indicators on page 115*
- *Troubleshooting the NetVanta UC Server on page 116*
- *Using the NetVanta UC Server Logs on page 117*
- *Accessing Documentation and Training on page 122*

## 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**.

## 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.



*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.



*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 122](#).*

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.

1. Uninstall the third-party antivirus or firewall software.
2. Shutdown the NetVanta UC Server and restart.



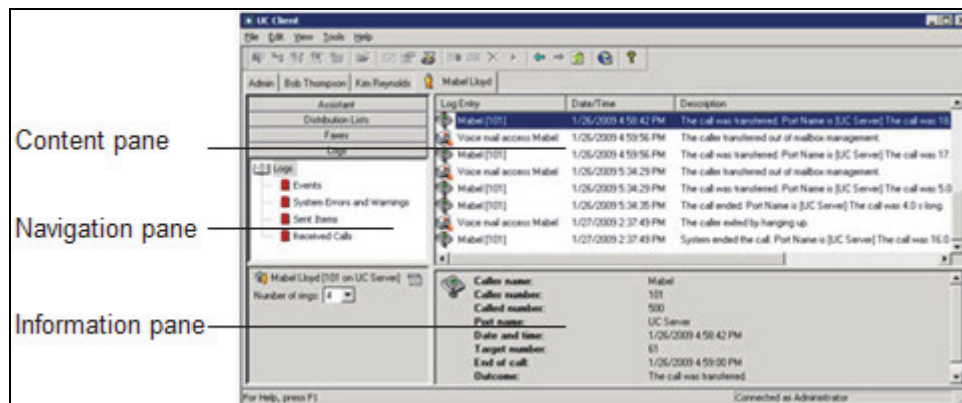
*Antivirus and firewall behavior is unpredictable even after shutting down or uninstalling.*

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 105](#).



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.

### 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](http://www.msdn.microsoft.com/en-us/library/cc721719.aspx) for details on how to create a custom alert.
2. Specify the following:

|                     |                    |
|---------------------|--------------------|
| <b>Path</b>         | Application        |
| <b>Provider</b>     | NetVanta UC Server |
| <b>SetEventID</b>   | 256                |
| <b>ClearEventID</b> | 512                |











*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 11–1: 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   |
|  | 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**.
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**



*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**



*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.



20020701\_0

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.

### 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**.



*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.



*Not all errors and warnings necessarily require action.*

### Log Entry

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.

### Possible Causes and Solutions

Verify that Caller ID is available when attempting to send a pager notification which includes sending the Caller ID.

## 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](http://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**

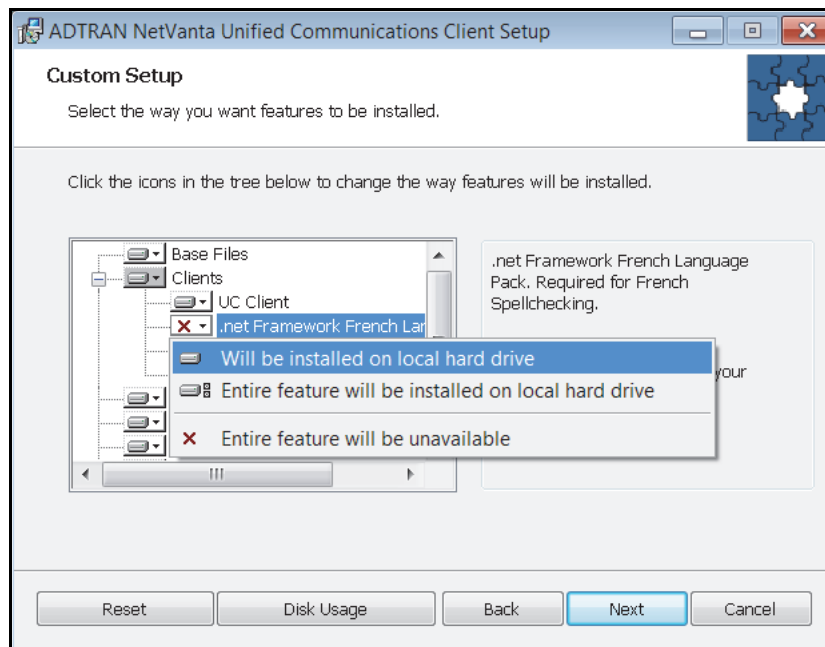
From the NetVanta UC Server select Help > About UC Client. Alternatively, select the ? button on the toolbar.



# 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**.