



NetVanta Unified Communications

NetVanta Unified Communications Server

Personal Assistant User Guide

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Conventions



NOTE

Notes provide additional useful information.



CAUTION

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

WARNING

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

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1 Getting Started

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

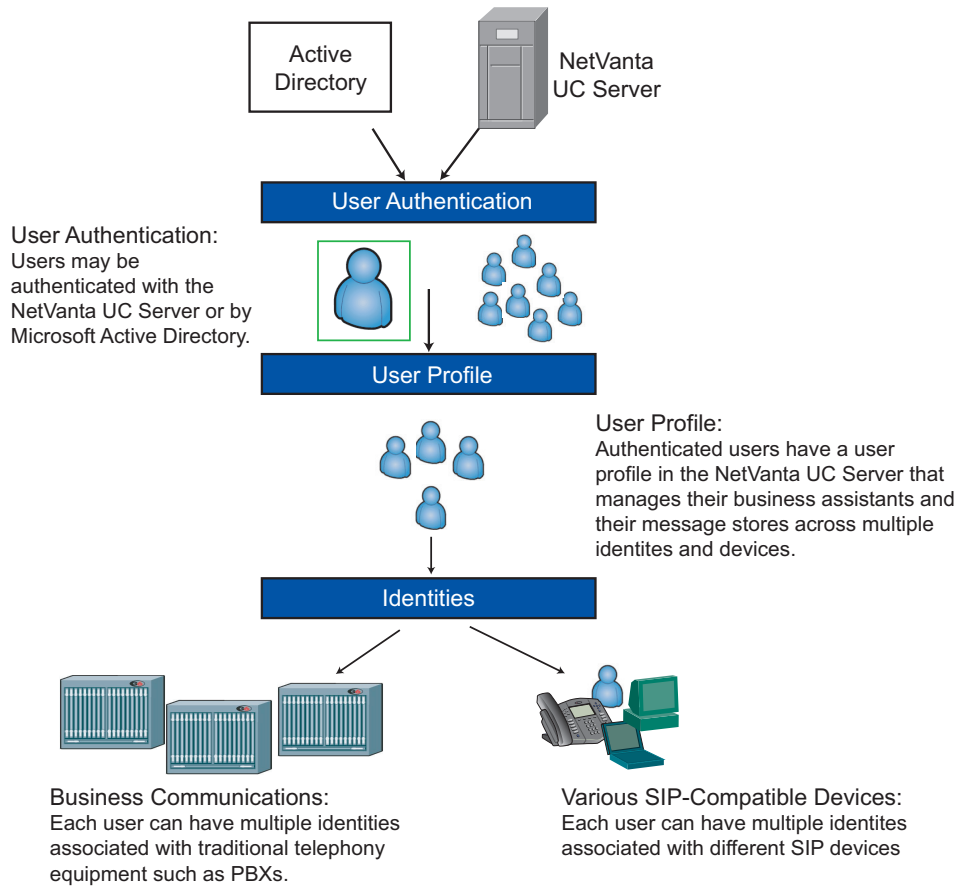
UC Server in Personal Assistant mode provides the most commonly used unified communications features. Master the basic functions and manage your personal greetings and delivery features with efficiency and ease, right from your desktop. The user interface is remarkably user-friendly.

The 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 UC Server is integrated with Active Directory.



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

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 UC Server access number
- Your default password for performing mailbox management
- The system-defined key used to perform remote mailbox management

Starting the Application

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

To start the application

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

First-time Access using the Desktop

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 <http://kb.adtran.com>.

To change your password and record your greetings

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



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

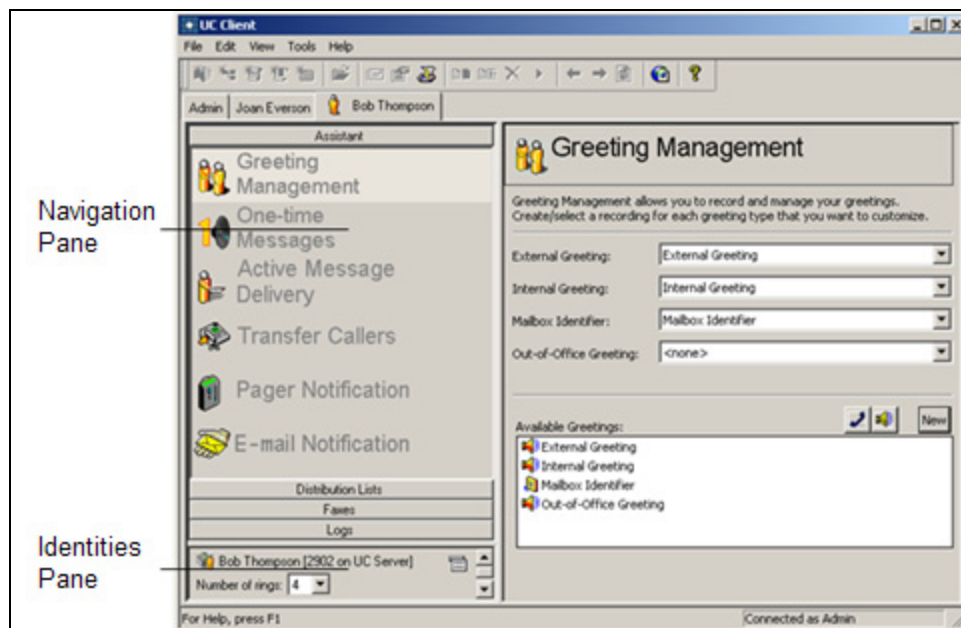
In the text box, you can type the greeting that you want to record. This is useful for eliminating pauses when you record.

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 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 UC Server access number and your default password. You can obtain these from your system administrator.

To access your mailbox using your telephone extension

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



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 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:

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

To change the message summary

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

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 91](#).

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 98](#).

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 131](#).

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

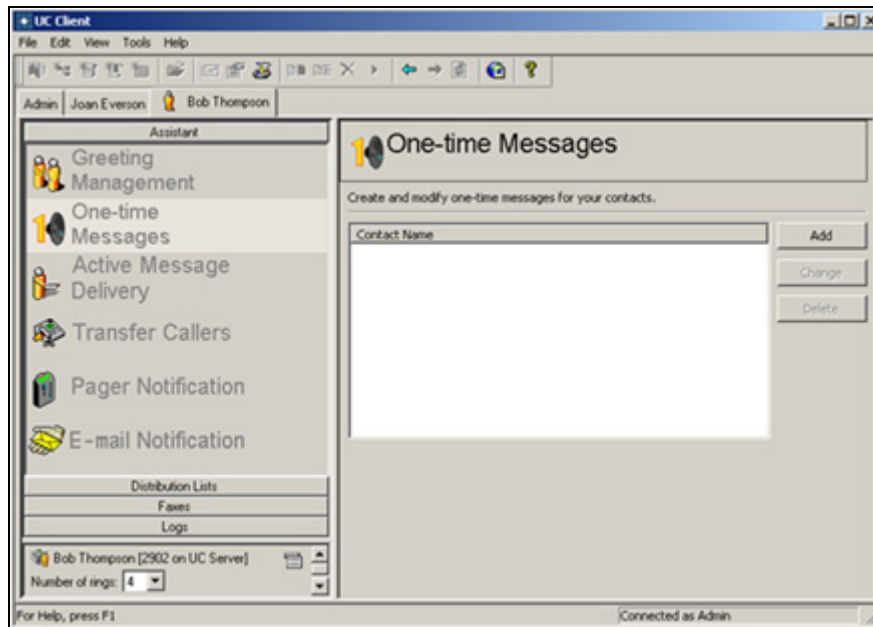
The One-time Messages feature allows you to record a message intended for a specific caller. The caller's name and telephone number are recorded in the Contacts list that you maintain in Outlook. You need caller

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 UC client 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 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 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 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 UC Server. Client-side contacts are synchronized with the information stored on the UC Server every time a user starts the NetVanta UC client and when the NetVanta UC client is shut down. If a user makes changes to their client-side contact database while the NetVanta UC client is open, and they want the UC Server to recognize these changes without having to shut-down and restart the NetVanta UC client, 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 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 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.

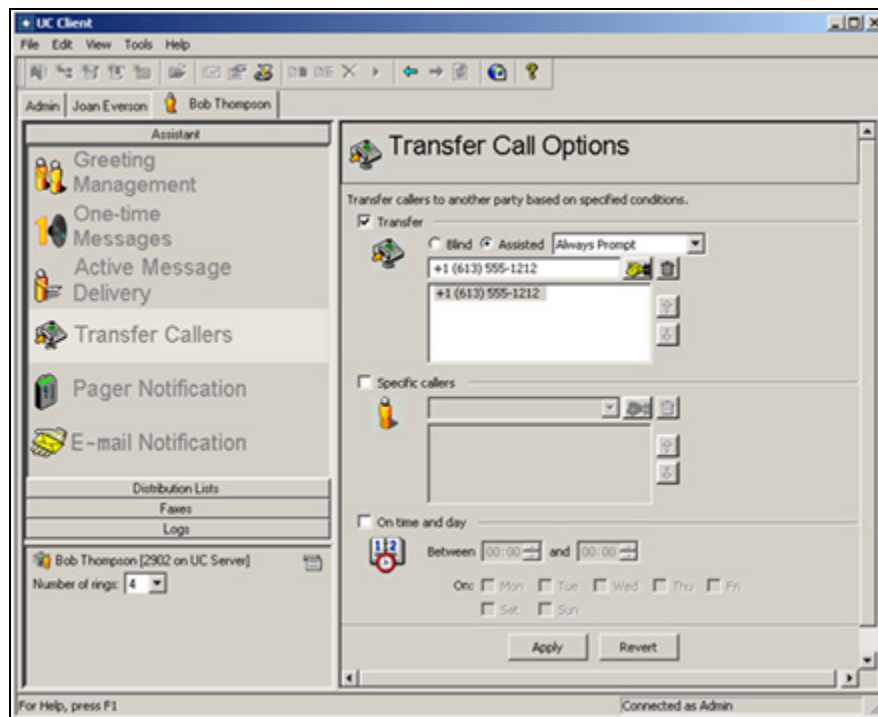
You can specify a target phone number, to which callers are transferred, and the type of transfer. Specifying an assisted transfer allows the call recipient to accept or deny a call based on the caller's recorded name. The default transfer type is a blind transfer, in which callers are transferred directly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

You can customize the notification options so that the 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 UC Server calls you and informs you that you have new messages. The 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 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 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 UC Server to try them.

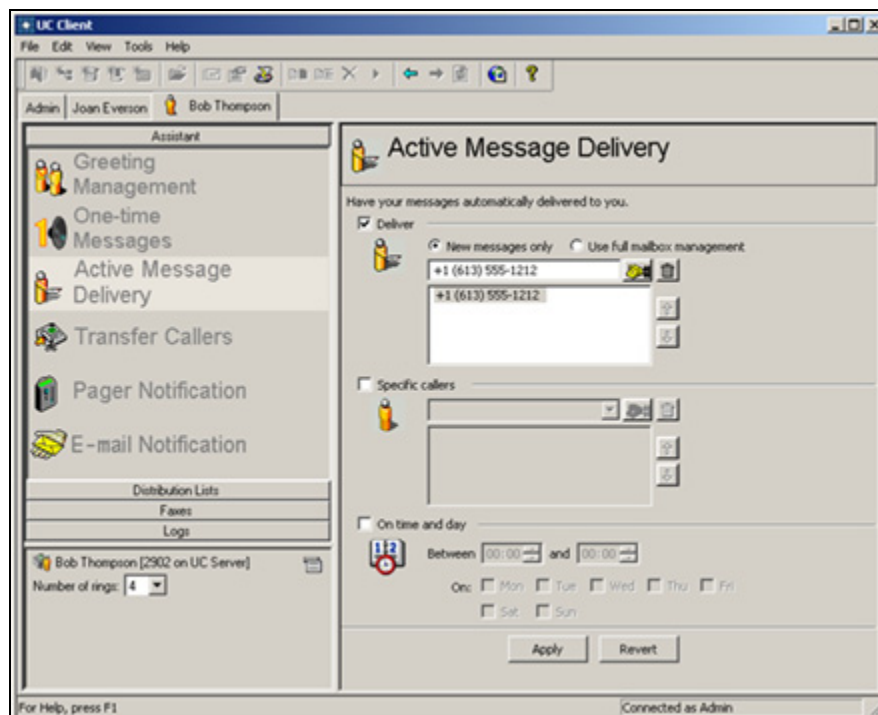
You can also cancel Active Message Delivery by specifying certain conditions. When the condition is met, Active Message Delivery is canceled. If the UC Server is between calls, Active Message Delivery is discontinued, and no further attempts are made. If an outgoing call is already in progress, that 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 UC Server to deliver only new messages. Use full mailbox management instructs for the 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 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 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 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 UC Server pages you using a supported paging system. If it is available,

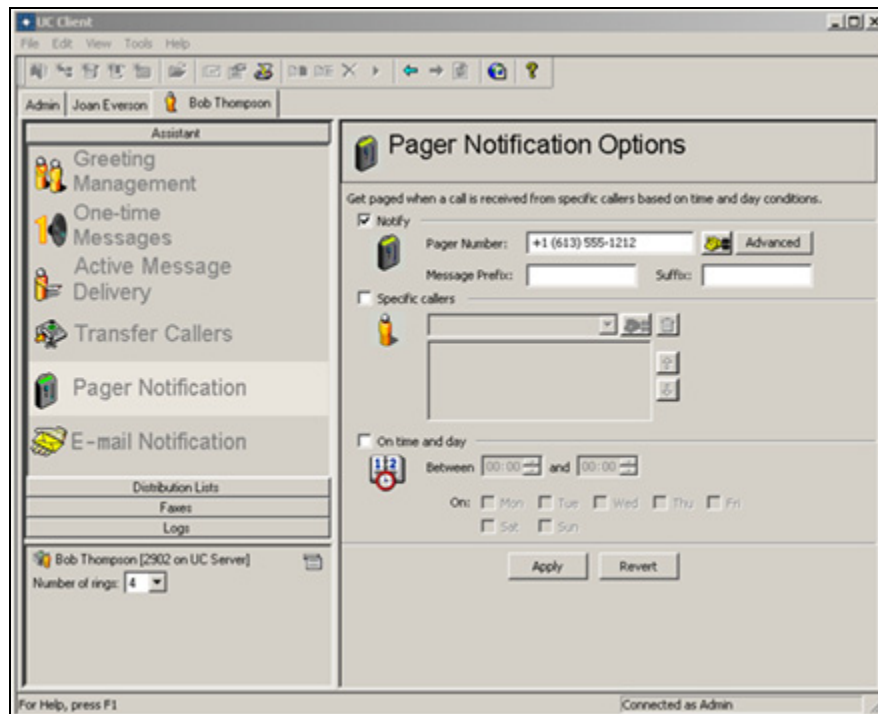
caller ID information from the call is transmitted to the paging system.



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 UC Server delivers. The prefix helps you differentiate between callers whose messages you have instructed the 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 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 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

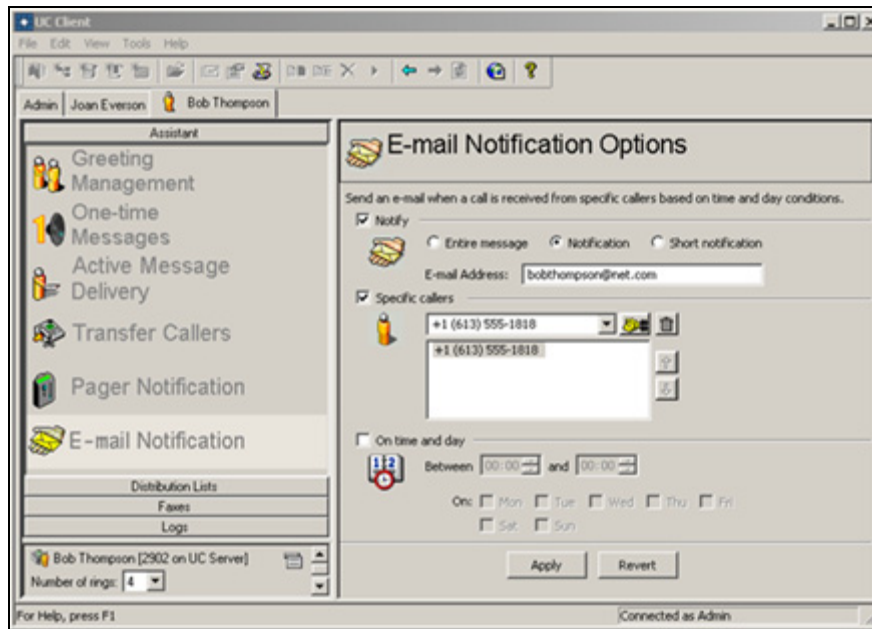
When a message arrives, the UC Server notifies you at the email address that you specify.



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.

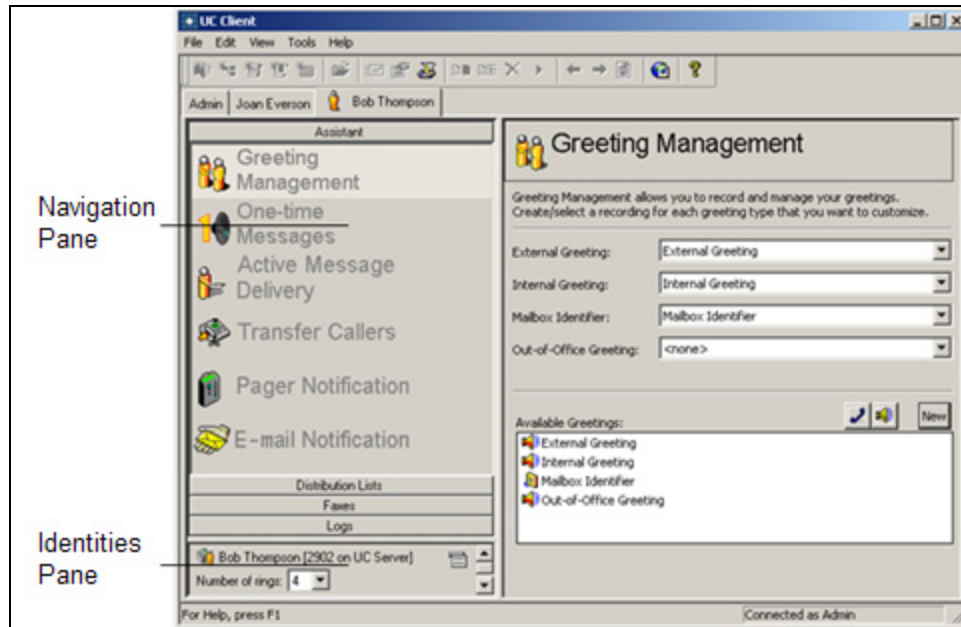


2. Enable the **Notify** check box to enable Email Notification.
3. Enable one of the following options:
 - **Entire Message**
 - **Notification**
 - **Short Notification**
4. Select **Apply**.

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**.
- 3.

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

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

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

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

Table 4–2: Playback commands

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



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

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

Table 4–3: End of message menu

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

Sending Messages from your Mailbox

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

To send a voice message from your mailbox:

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

Table 4–4: Post-recording options

1	keep
2	re-record
3	listen
*	cancel

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

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

To reply to an internal voice message

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

To reply to an email message

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



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 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:

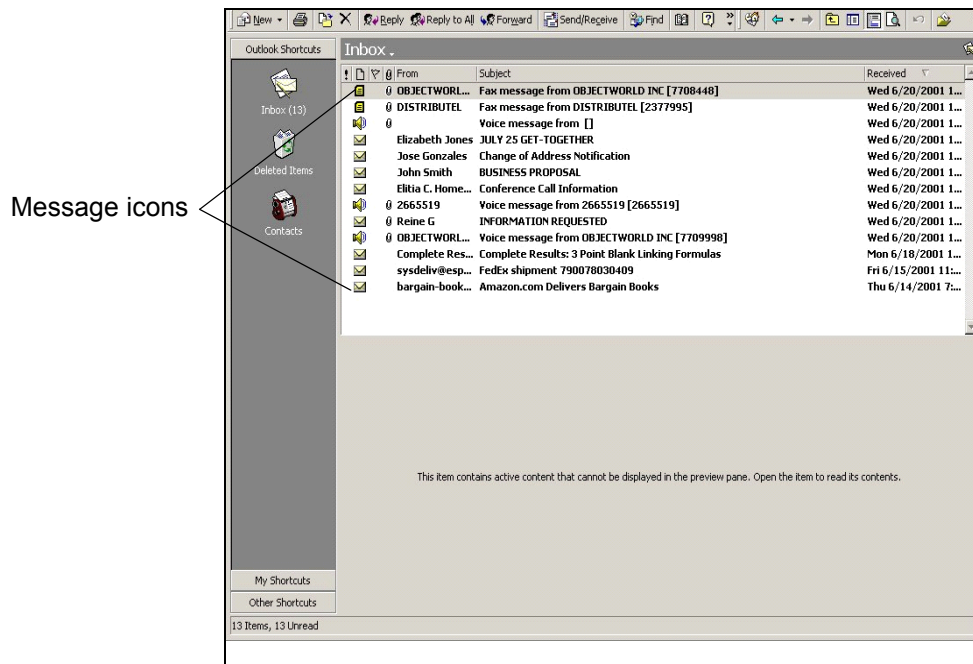
- [Overview on page 49](#)
- [Managing Messages in Microsoft Outlook on page 49](#)
- [Managing Messages in Lotus Notes on page 55](#)
- [Managing Messages in the Mailboxes Menu in the NetVanta UC client on page 61](#)

Overview

The UC Server works with Microsoft Exchange, Lotus Notes, an integrated messaging client (using the Mailboxes menu in the 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 UC Server can be integrated with Microsoft Outlook so that all your messages appear in the same inbox. Here is what an Outlook inbox looks like:



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.

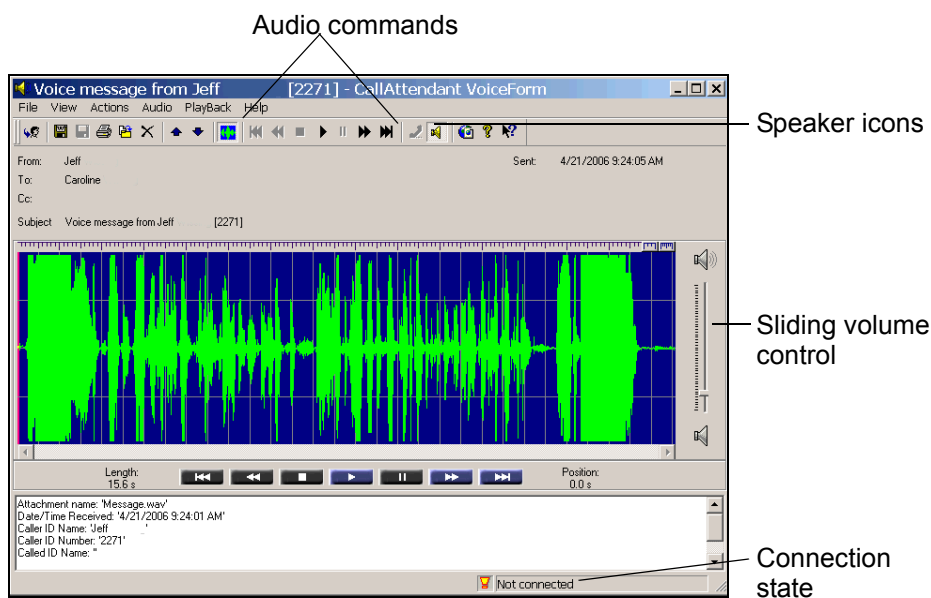
To listen to a voice message

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 voice message window appears.

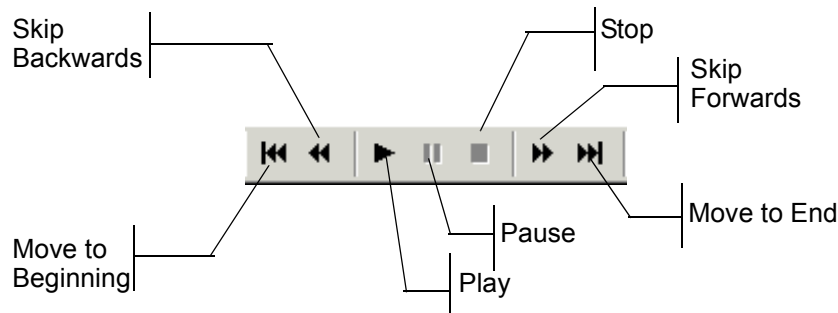


2. Select the icon of the speaker that you want to use.



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

3. Select **play**. 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 print options that you want.
3. Select **OK**.

To save the audio component of a voice message

1. Select **File > Save As**.
2. In the **File name** text box, type 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. Outlook folders appear in the folder list of your inbox.

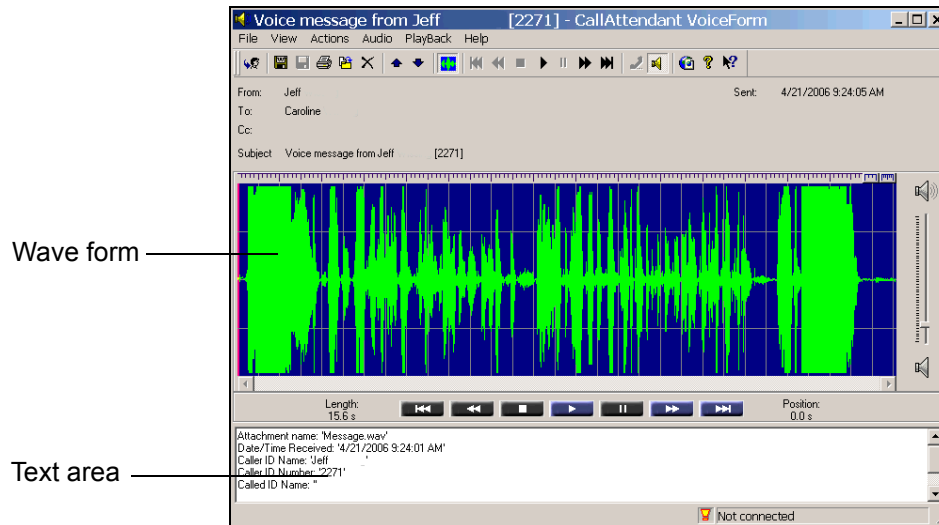
To forward a voice message

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



Forward message icon

The following window opens.



2. In the text area, type 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 type the recipient's email address in the **Forward Voicemail To** text box.
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 client. 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** text box, type 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



Save as PDF File icon

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

3. In the **File name** text box, type 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, type 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 type the recipient's email address in the **To** text box.
6. Select **OK**.
7. Select **File > Send**.

To forward a fax message by email

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



Forward message as
a PDF file

The NetVanta UC client FaxForm 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, type 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, type 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 type the recipient's email address in the **To** text box.
7. Select **File > Send**.

Managing Messages in Lotus Notes

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

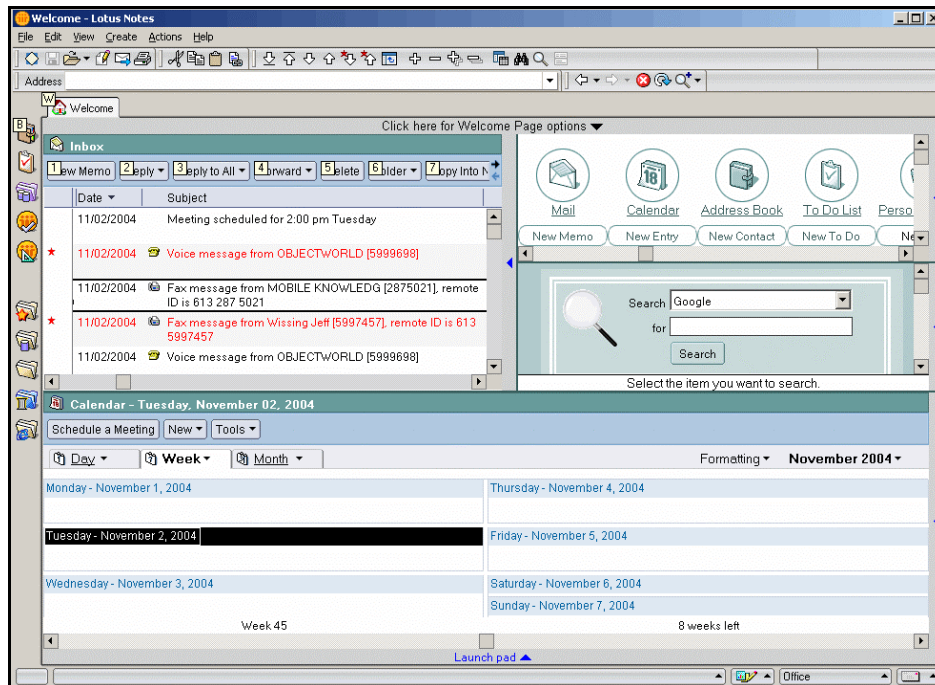
Lotus Notes users can view voice messages in their inbox and can play voice messages through either a computer sound card or over the telephone. Lotus Notes users can also view fax messages without opening additional programs.

Launching Lotus Notes

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

To launch Lotus Notes with the UC Server the first time

1. Launch Lotus Notes.
2. In the Server Name box, select the machine name or IP address of the 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. Type your user name in the **User name** box. In most cases, the user name is your mailbox number.
6. Type 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 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

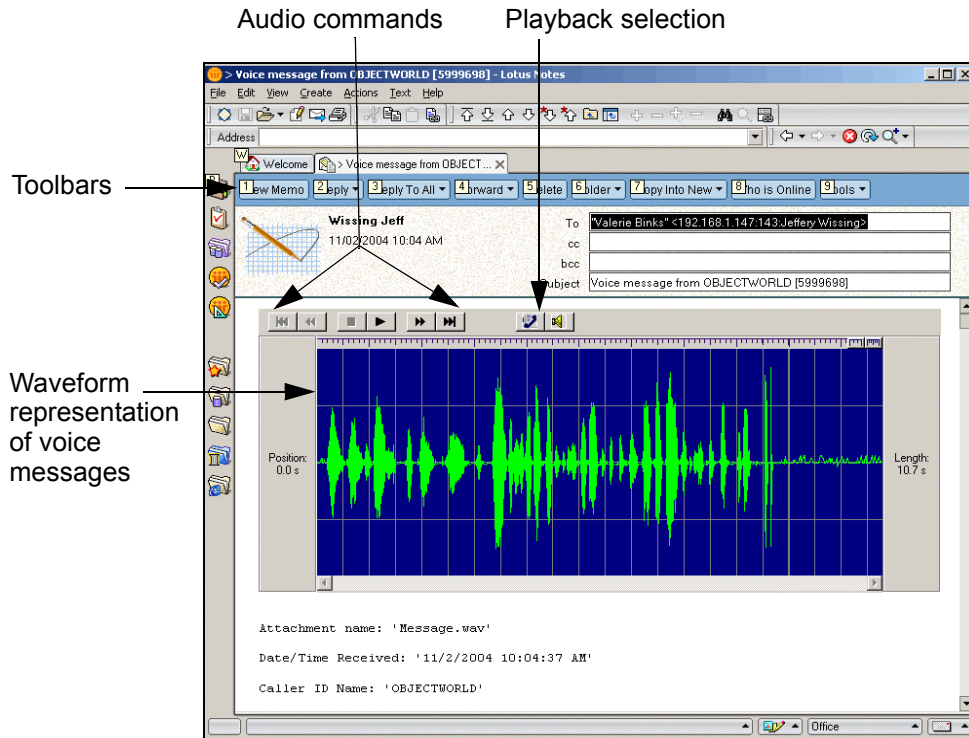


Fax icon

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 type: 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. Type 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

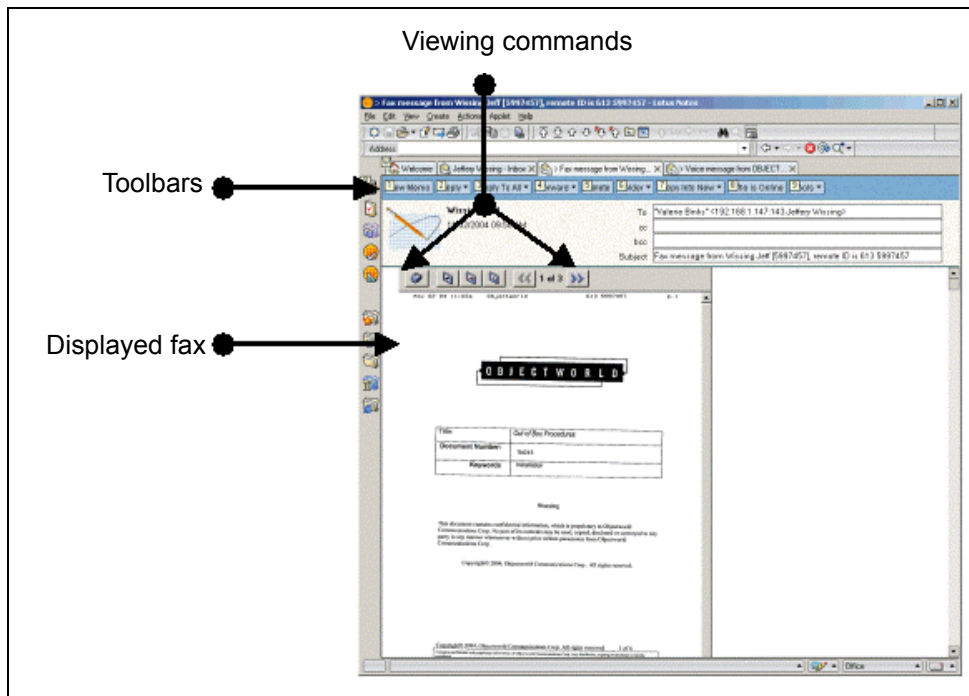
1. Select **Forward**.
2. Select one of the following:
 - Forward
 - Forward without Attachment(s)
 - Forward with Internet-Style History
3. Type the email address to which you want to forward the memo.
4. If you want to add a message, type it in the message area.
5. Select **Send**. If you want to save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

 <p>NOTE</p>	<p><i>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.”</i></p>
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For information about the fax transmission report, refer to [Managing outgoing faxes on page 71](#).

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



Save as PDF

1. Double-click a fax message
2. Select on the **Save as PDF...** icon in the fax control
3. In the file name box, type 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 UC Server

1. Launch the NetVanta UC client.
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 the 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, type 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 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 65](#)
- [Sending Faxes on page 65](#)
- [Receiving Faxes on page 89](#)

Overview

Use the Faxes menu to send and manage fax documents and their cover pages from the 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 UC client using Quick Fax
- Sending a prepared fax from the 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 UC client) or IMAP4.

The 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 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.



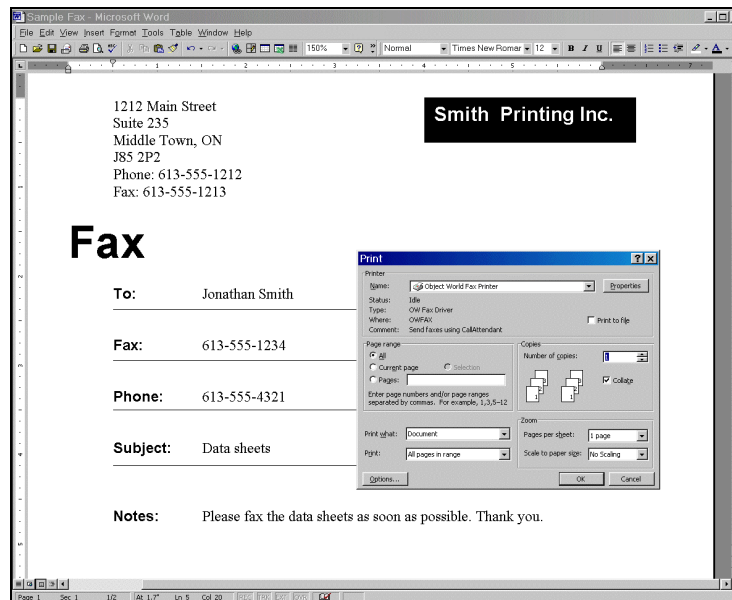
You can send a fax cover page only using Quick Fax. For more information, refer to [Sending cover pages only using Quick Fax on page 88](#).

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 dialog box.



3. From the printer name list 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 UC client fax printer dialog 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 68](#).

6. If you select **Save to file**, refer to *To save a document as a fax on page 67*.
7. If you select **Send now**, select **OK** to open the Fax Recipients dialog box.
8. Select **Addresses** to select recipients from your Outlook Contacts list. Otherwise, type 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 dialog box opens.
11. Specify when you want to send the fax, select **Next**, and the Select Cover Page dialog 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 dialog box opens. Use the arrow if you want to return to the previous folder.



Go back arrow

14. Type 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 dialog box.
3. In the Name list, 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 dialog box opens then select **UC Server** from the list, enable the **Save server as default** check box, and select **OK** to open the UC client *Fax Printer* dialog box.
6. Enable the **Save to file** button.

7. Select the **Browse** button to open the Select Fax Name dialog box.



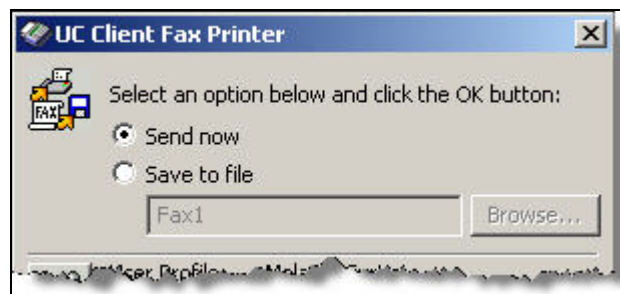
Browse Button

8. In the text box, type a name for the file and then select **Select**.
9. On the Fax Printer dialog 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* dialog once you have selected the **ADTRAN Fax Printer** and selected **Print**, then you are presented with the UC client *Fax Printer* dialog.



To change users when sending or saving a fax

1. From the UC client Fax Printer dialog box, select the **Change user** button.



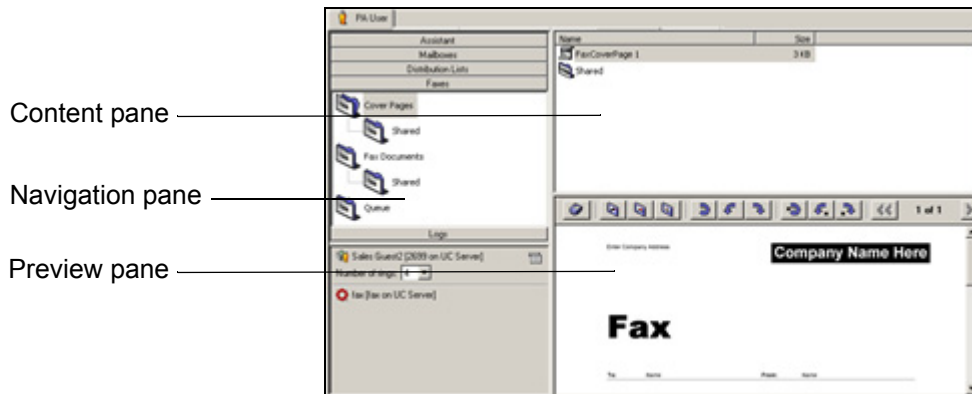
Change user button

2. Type 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 dialog box.
3. Select **OK**.

Sending faxes using the Faxes menu in the NetVanta UC Client

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

For information about sharing faxes, refer to *Importing and Exporting on page 93*.



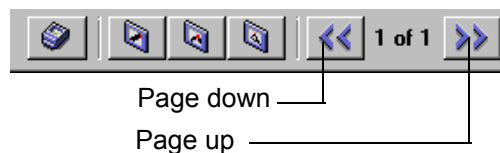
The **Faxes menu** displays a Navigation pane, Content pane, and Preview pane.

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 **Content pane** displays the contents of a folder when you select it.

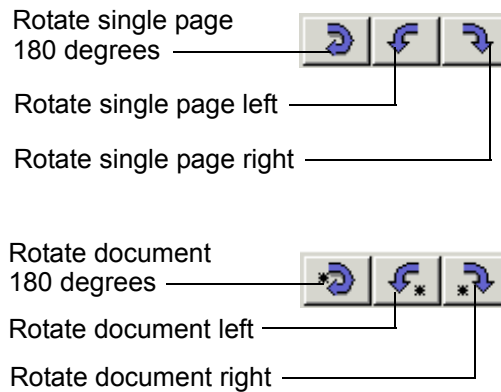
The **Preview pane** provides a partial view of a fax document that you select. As you scroll through the list of available fax documents, you can view them in the Preview pane.

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 Preview 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 71](#).

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 content pane.



Faxes Folder

3. Select the fax document that you want to send.
4. Select **File > Print** to open the Print dialog box.
5. Follow steps 3 to 18 in [Sending faxes from other applications using the ADTRAN Fax Printer on page 66](#).

To specify fax numbers and account code

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



Telephone icon

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

3. Choose a country code from the Country code list.
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 text box, 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.

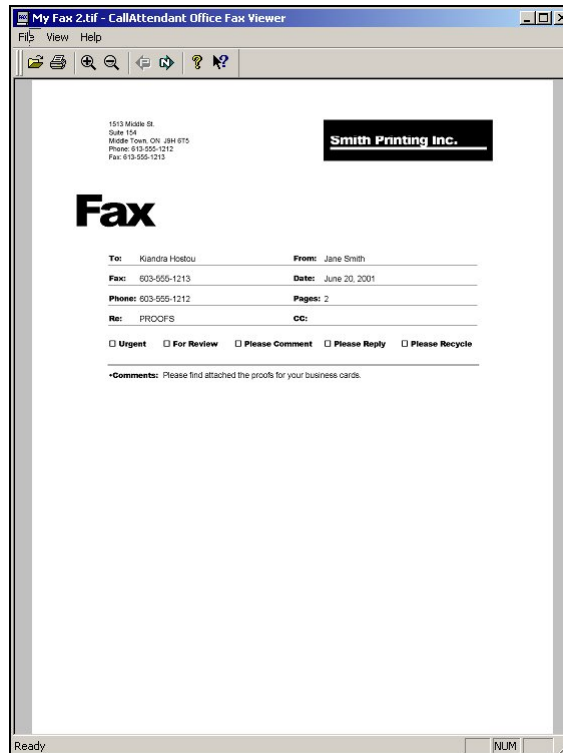
To preview a fax document

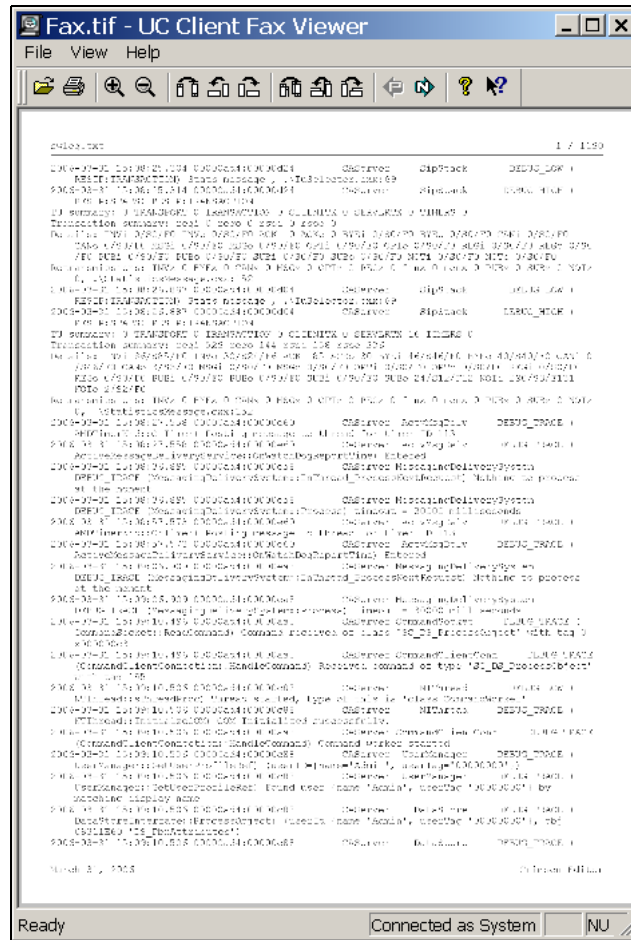
1. Select the **Faxes** navigation bar to open the Faxes menu.
2. Select the fax documents folder containing the document that you want to preview. The folder's contents are listed in the content pane.



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 content 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 dialog 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 content 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 content pane.
3. Right-click the fax document that you want to rename, and select **Rename**.
4. Type 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 content pane.
3. Right-click the fax document that you want to copy, and select **Duplicate**. A copy of the fax document appears in the content 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 content 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 content pane.
2. Select **New > Folder**. A new folder is added to the list in the content pane.
3. Type 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 content 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 content 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 content 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 content 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 dialog 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 content 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 dialog 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 content 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 dialog box.
3. Select **Addresses** to select a recipient from your Outlook contacts list. Otherwise, type 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 content 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 content 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 content 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 content 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 93](#).

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

Creating fax cover pages

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 content pane.
4. Select **New > Fax Cover Page**. A new untitled cover page appears in the content pane.
5. Type 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. Type a new name for the fax cover page.
8. Double-click the new fax cover page to open the Fax Cover Page Editor and make the changes that you want.



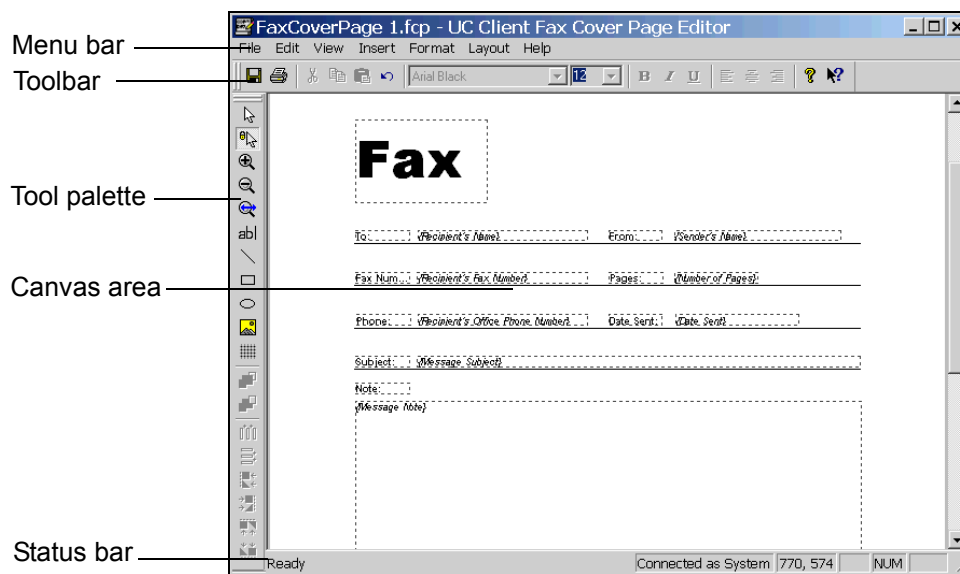
If you do not make a copy of the cover page before you make the changes, the application permanently replaces the original cover page template with your changed copy.

Customizing fax cover pages using the Fax Cover Page Editor

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

To access the Fax Cover Page Editor

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

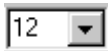
1. Select anywhere inside the label's dotted rectangle and then drag it to the desired position.
2. Do the same with the dotted rectangle of the associated field.

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 list.



- Select a point size from the size list.



- 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. Type the changes to the label content.



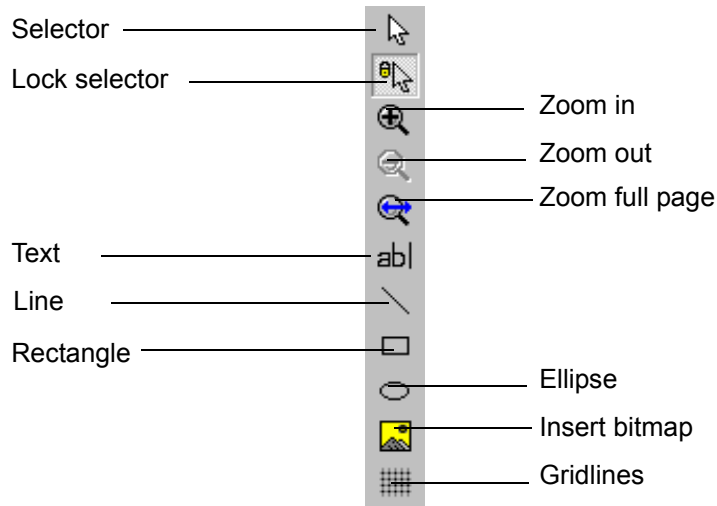
You can change label content, but you cannot change associated field content from within the Fax Cover Page Editor. To change field content related to a specific fax transmission, you need to do so from the fax queue. Select the fax that you want to change and right-click to get a shortcut menu.

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

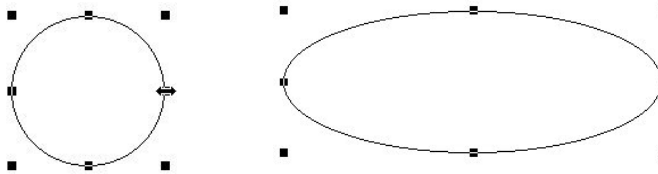
1. Select the shape to select it.
2. Drag the shape to the position that you want.



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. Type 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

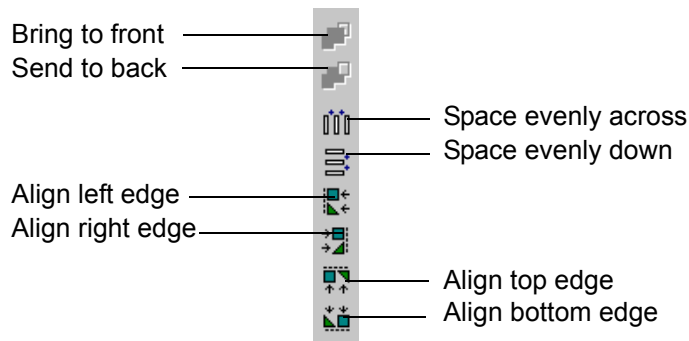
1. Select the lock selector tool.
2. Select the text tool.
3. Select where you want to insert the text box and then drag to the right and down. A dotted text box appears on the canvas.
4. Select **Format > Line, Fill and Color** to open the Line, Fill and Color dialog box.
5. Select the **Draw border/line**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

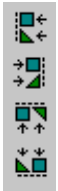


Spacing tools

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

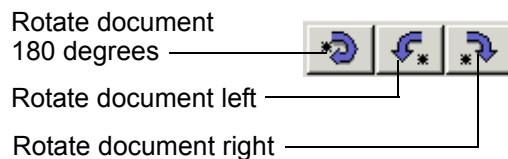
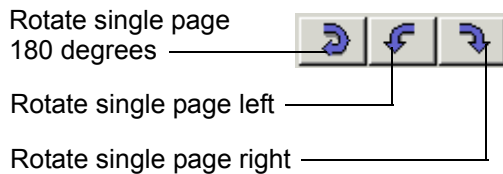
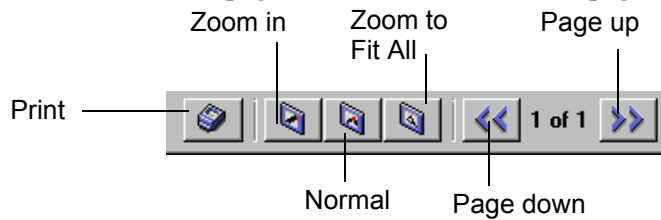
The items that you selected are aligned by the edges that you specify.

Managing fax cover pages

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 content pane.
3. Select the fax cover page that you want to preview.
4. In the preview pane, select **Download** to get the file from the server. The cover page appears in the preview pane.

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



To rename a fax cover page

- Select the **Faxes** navigation bar to open the Faxes menu.
- Select the **Cover Pages** icon. The fax cover pages are listed in the content pane.
- Right-click the cover page that you want to rename.
- Select **Rename**.
- Type a new name for the cover page.
- Select the icon of the new cover page to make the change.

To copy a fax cover page

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

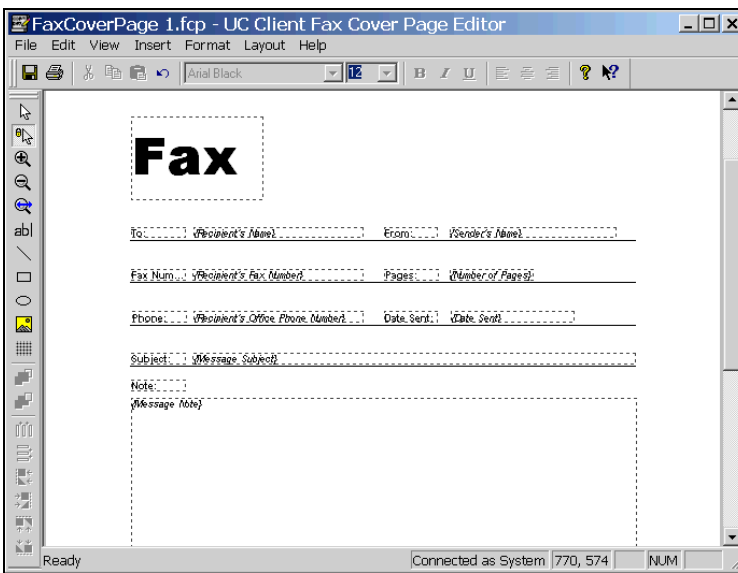
To delete a fax cover page

- Select the **Faxes** navigation bar to open the Faxes menu.
- Select the **Cover Pages** icon. The fax cover pages are listed in the content pane.
- 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 content 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**.

Sending cover pages 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.

To send a cover page only using Quick Fax

1. On the toolbar, select the **Quick Fax** icon to open the Fax Recipients dialog 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, type 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 dialog 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 dialog box.
7. Select a cover page to use as your Quick Fax document.
8. Select **Next** to open the Cover Page Details dialog box.
9. Type the subject of your Quick Fax and then type 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 UC server detects the tone that signals a fax, the 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 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.

7 Creating Distribution Lists

Overview

You can use the Distribution Lists menu to manage personal distribution lists. Distribution lists allow you to send voice and fax messages to groups of users using the telephone. For information about using the distribution lists over the telephone, refer to [Managing distribution lists on page 18](#).

Three folders are included with the Client application—Everyone, Personal, and System. The Everyone folder contains all the 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.

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 content pane right-click, and select **New > Distribution List**.
4. Type a Name for the distribution list folder.
5. Type a unique number in the List Identifier box.
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 92](#).
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:
 - Type a new name in the Name box.
 - Type a new number in the List Identifier box.
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 92](#).
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. Type 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 content 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 box, 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.

8 Importing and Exporting

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

- [Overview on page 93](#)
- [Starting the Import/Export Wizard on page 93](#)
- [Importing and Exporting Items on page 93](#)

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. In the **Task Selection** box, select **Import data from the File System**, and then select **Next**.
2. In the **Import Directory** box, 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 box, 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. In the Select task to perform box, 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.

9 Setting Options

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

- [Setting General Options on page 95](#)
- [Setting Message Delivery Options on page 96](#)
- [Customizing your Mailbox on page 98](#)
- [Setting Integrated Messaging Options on page 100](#)
- [Compressing Voice Messages on page 101](#)



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 Active Message Delivery feature.

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

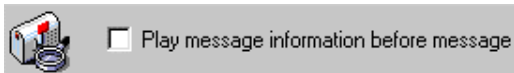
Message information is played before each message. It includes:

- 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**.

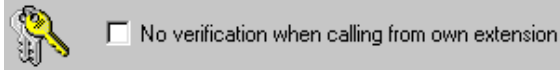
Turning password verification on or off

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.

10 Troubleshooting

Overview

You can use UC server logs to review calls, events, system errors or warnings.

You can configure the 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 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. For more information, refer to the following sections:

- [Troubleshooting Message Waiting Indicators on page 103](#)
- [Troubleshooting the NetVanta UC Server on page 104](#)
- [Using the NetVanta UC Server Logs on page 105](#)
- [Accessing Documentation and Training on page 111](#)

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 UC server.



The UC server is tested with Microsoft security products, such as Windows Firewall and Windows Defender.

Symptoms

- UC server services keep shutting down with Trend Micro software installed.
- The 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 111](#).

Solution A: Verify that the NetVanta UC Server files are excluded from antivirus software scanning

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 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.

Solution B: Uninstall the third-party antivirus or firewall software

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



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

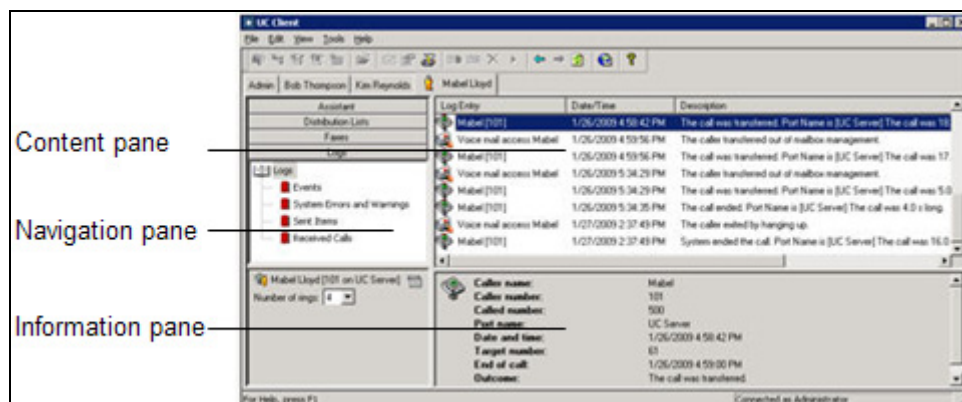
Solution C: Uninstall all software and reinstall

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 93](#).



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.



To troubleshoot specific warnings, refer to [Troubleshooting warning log entries on page 110](#).

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 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 UC server was unable to deliver a message, then the 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 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 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 UC client disappears.

To view system errors and warning logs

1. On the left side of the 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 content pane, the errors and warning logs appear.

To acknowledge the alert notification

On the right side in the Logs content 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 UC client window.

Managing NetVanta UC Server Alerts from Windows SBS 2008

Microsoft Windows Small Business Server (SBS) 2008 records unacknowledged errors or warnings in the UC server. This simplifies management such that Administrators do not need to have the UC client open in order to be aware of any error or warning messages.

When the UC server is installed on Windows SBS 2008, a custom alert is automatically configured for the SBS 2008 Console. If the 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 for details on how to create a custom alert.
2. Specify the following:

Path	Application
Provider	UC server
SetEventID	256
ClearEventID	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 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 10–1: 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

Table 10–1: Log entry icon definitions

	Voicemail access—represents a voice message event, for example, a voice message sent from a UC server user to another user
	Pager access—represents events in which UC server users send or receive a page
	Message delivered
	Voicemail 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 content 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 content 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**, type the date in the text box.
5. Select **OK**.

To archive a log

1. Right-click anywhere in the content 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**, type the date in the text box. 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. Type 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**:
 - Type a location for the file in the **Save exported file as** box.
 - Select **Browse** to find a location for the file.
7. If you want to save the configuration, type a name in the box.
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 website at <http://kb.adtran.com>. Here you will find training materials, and a quick reference card.

Accessing Technical Support

Unless there is a support contract in place, please see your reseller for support information. For more information on ADTRAN Technical Support, refer to the ADTRAN website at www.adtran.com.

If you are contacting ADTRAN Technical Support, then please ensure that you have the following information readily available.

- Product edition (Standard, SIP, or CEBP)
- Product version
- Service code

The Service code is an identification number to be used when contacting ADTRAN Technical Support. If you are contacting ADTRAN Technical Support then you will need to enter the service code number over the phone, so have the number ready when you call. The service contract type and expiry date are available for your information.

To access the NetVanta UC Server product and service information

From the UC server select **Help > About UC Client**. Alternatively, select the ? button on the toolbar.

Appendix A - Glossary

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 are also used to ensure security because a caller who does not have an account code cannot access specified information. Use account codes to allow long distance dialing, in which the telephone company applies the long distance charges to your account code.

Active Message Delivery

Active Message Delivery is a feature of the UC server. The UC server calls you to deliver your messages. It informs you of a new message and asks you to enter your password to review the message.

Active Service

Your active service is the service that is currently enabled and answering your calls.

Announcements

Announcements are outgoing recorded messages that play to callers. Announcements apply to trunk lines and are managed by the network administrator.

Assisted Transfer

An option that allows the call recipient to accept or deny a call based on the caller's recorded name.

Caller

A caller is a person who initiates an incoming call.

Call Park/Pickup

A type of hold that allows a user to "park" a caller on hold so that another user on the system can pick up the call on another telephone.

Call Transfer

Have your calls transferred to an operator, to another number, or to a different extension using the Call Transfer element in your service. Note that your workplace must have Call Transfer from your telephone service provider or PBX to be able to use the Call Transfer element.

Contacts

Contacts are individuals from whom you receive calls, email messages or faxes. They are entered in the Contacts database in Microsoft Outlook.

Cover Page Editor

The Cover Page Editor is the tool you use to create and design fax cover pages.

DTMF

Dual tone multi-frequency tones are also known as touchtone dialing.

Fax-on-demand

Fax-on-demand allows callers to dial in and retrieve a fax document completely unattended. The caller follows instructions to select the desired document and the UC server automatically transmits it. The administrator sets up fax-on-demand services on trunk lines.

Greetings

Users can record three types of standard greetings: an identifier, an internal greeting, and an external greeting. The identifier states the user's name. The internal greeting is played to internal callers, while external callers making incoming calls hear the external greeting.

Identities

Any dialable string of numbers, such as an extension or email address, that reaches a specific user is an identity. A user profile can have several identities.

Integrated Messaging

If Integrated Messaging is enabled for a user, then a Mailboxes navigation bar is added to the user's UC client. The user can then manage their voice and fax messages visually through the Inbox and Sent Items folders in the UC client.

Logs

Logs are records of activity within the UC server. The UC server logs all events and provides information on Errors and Warnings, Received Calls, Sent Items, and Events.

One-time Message

A One-time Message is a message that you record for an expected caller. The message is caller-specific such that no others will receive it. When the message has been played, it is automatically erased.

Pager notification

Pager Notification is a feature of the UC server that calls your supported paging system to inform you of new messages in your mailbox.

PBX

The Private Branch Exchange is a system of telephone lines that serves an organization and uses telephone services, rather than supplies them. Users of the PBX share a certain number of outside lines for making external calls.

Remote mailbox management

Remote mailbox management allows users to access their mailbox from an external, or remote, telephone.

Text-to-speech

The text-to-speech engine reads back email messages over the phone when users call in to review their messages.

User

A user is someone who has a UC server profile on the system.

Unified Messaging

Unified Messaging allows users to manage all message types from one central storage location. This means a single inbox for voice, email, and fax messages that is accessible by both telephone and computer. The UC server provides a unified messaging solution that allows you to receive all your messages in the Microsoft Outlook Client. Users receive all of their messages at once, in one convenient location.

Appendix B - Installing the NetVanta UC Client Application

To install the application

1. Insert the NetVanta UC Client **CD-ROM** into the CD-ROM drive of the user's computer.
2. On the desktop, select **My Computer**.
3. Double-click the CD-ROM drive icon to start the auto-run utility.
4. Select **Install UC Client**.
5. Double-click **Setup** to open the Welcome menu.
6. Select **Next**. Read the Software License Agreement menu carefully.
7. If you accept the agreement, select **Yes** to open the Choose Destination Location menu. The default destination folder is:
C:\...\UC client.
8. Select **Next** to open the **SetupType** menu. The default setup is **Typical**.
9. Select **Next** to open the **Select Program** folder menu. The default program folder is ADTRAN UC client.
10. Select **Next**. Wait while the program files are copied to your computer. The **Setup Complete** menu appears when the UC client application is installed.
11. Select **Finish**.