NEC Corporation of America

UNIVERGE® UM8700

System Administration Guide

Telephony Server Document

Applies to Version 8.6 and above

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Edition Note

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Preface

This guide is written for those UNIVERGE® UM8700 system administrators using software version 8.6. It consists of the following parts:

- An Introduction to UM8700 Admin
- Working with Administrator accounts
- Managing Mailboxes
- Working with Call Processor mailboxes
- Working with Class of Service and Subscriber mailboxes
- Working with System Configuration settings
- Configuring an Answer mode
- Managing Speech commands
- Managing Groups
- Importing and Exporting Mailboxes
- Working with the Mailbox Archive utility
- An introduction to UM8700 Configuration
- Configuring the Online Backup Location
- Restoring the Database
- An introduction to the Line Status utility
- Changing Line Status

This guide assumes that you are familiar with the Microsoft Windows operating system.

Help

The primary source of information about UM8700 is the online help available within any of its administrative utilities. You can consult Help by taking one of the following steps:

- Select the appropriate command from the Help menu.
- Press the F1 key at any time.

Selecting the Index and Contents tabs from the Help menu causes Help to display an index system and table of contents that cross-references all UM8700 Help files, enabling installers, and system administrators to pinpoint the information they need with as little time and effort as possible.

Document Conventions

The following conventions apply to information in this guide:

Bold	Indicates text you type; enter the information exactly as shown. It also indicates buttons and commands that you click or select from menus.
Italics	Introduce or emphasize a term; can also signify a UM8700 voice prompt or announcement. Titles of other documents are shown in italics as well.
Mono-space	Indicates XML blocks, XML element and attribute names, Parameter names, structure names, code elements within text, errors, error numbers, and error strings, PBX commands and programming examples

WARNING A warning paragraph advises you of circumstances that can result in the loss of data, harm to the Telephony Server platform, or personal harm.

IMPORTANT An important paragraph gives decision-making information or informs you of the order in which tasks need to be completed.

NOTE A note gives additional information, provides an explanation, or indicates an exception to the information in the preceding text.

The terms Telephony Server and Telephony Server platform refer to an organization's computer platform that has UM8700 software installed and is dedicated for use as the organization's unified messaging server.

Frequently Used Terms

The terms System Server and Call Server refer to an organization’s computer platforms that have UM8700 software installed and are dedicated for use, as the organization’s unified messaging servers.

The term Telephony Server refers generically to the System Server platform, the Call Server platform, or both. The term is most often used to describe a software or hardware installation or configuration practice where the role of the server platform is not specifically expressed.

Online Books

Included on the UM8700 DVD is a series of online books. If you are installing any advanced applications, such as Networking and Fax Server applications, you should refer to the appropriate online books for application and installation information. If you want to keep your set of UM8700 documents up to date, you can download the latest editions at any time from the NEC website, http://www.ntac.com.

Online books are provided in Adobe Acrobat PDF format and must be read using the Adobe Acrobat Reader program. You can download the program from http://www.adobe.com.

The UM8700 Telephone Quick Reference introduces UM8700 users to the system of voice menus and commands they use to manage their messages over a telephone—the telephone user interface, or TUI for short. Because you can select one of four available TUI layouts for each user, four different editions of the Telephone Quick Reference are available.

Quick reference cards brief users on how to use Unified Messaging for Lotus Notes® and Domino™ Server, Unified Messaging for Microsoft Exchange Server, UM8700 for IBM Lotus Domino Unified Communications, Unified Messaging for Internet Message Access Protocol (IMAP), Short Message Service (SMS), and Voice Intercept Messaging (VIM). If the system in your office includes any of these features, you can print copies of these cards and distribute them as needed.

To determine where to look for more information on a specific subject, refer to the following table.

For information about …	See…
Configuring a UM8700 Telephony Server and a OpenText™ RightFax® fax server to work together in managing incoming fax messages	The RightFax Getting Started Guide and the online book Fax Messaging
Configuring a UM8700 system to support Unified Messaging on an IMAP compliant e-mail server	The online book UM8700 Unified Messaging for IMAP
Configuring a UM8700 system to support Unified Messaging on a Lotus Domino system that has IBM Lotus Domino Unified Communications installed	The online book UM8700 for IBM Lotus Domino Unified Communications
Configuring a UM8700 system to support the Unified Messaging for Lotus Notes and Domino client program and installing that program on subscribers' computers	The online book UM8700 Unified Messaging for Lotus Notes and Domino
Configuring a UM8700 system to support the Unified Messaging for Microsoft Exchange client program and installing that program on subscribers' computers	The online book *UM8700 Unified Messaging* for Microsoft Exchange
Configuring a UM8700 system to support an IMAP-based e-mail client	The online book Integrated Client Access
Configuring and changing your Short Message Service (SMS) message notification settings	The Short Message Service quick reference card

For information about …	See…
Configuring two or more networked UM8700 systems so that administrators on one server can view and change mailboxes and system configuration settings on the others	The online book Managing an Enterprise System
Configuring, installing, or replacing a Telephony Server platform or one of its hardware components	The spare parts document for the platform or component
Connecting the Call Server to the telephone system and programming both so that they handle calls in an integrated manner	The UM8700 Integration Technical Note for the telephone system
Creating new UCConnect scripts automatically	The UCConnect ScriptMaster™ online help
Diagnosing and correcting conflicts in information traffic (known as mailbox conflicts and server conflicts) between networked UM8700 systems	The online book Managing an Enterprise System
Installing a Telephony Server platform, setting up the UM8700 software on it, and preparing it to be used for the first time	System Installation Guide
Installing UCConnect interactive voice response (IVR) development software	The online book UCConnect: Getting Started
Installing the Web PhoneManager™ application on a web server and making it available to subscribers	The online book *Web PhoneManager*
Managing voice and fax messages through Lotus Notes	The online help and quick reference card for Unified Messaging for Lotus Notes and Domino, or the quick reference card for UM8700 for IBM Lotus Domino Unified Communications
Managing voice and fax messages through Microsoft Outlook	The online help and quick reference card for Unified Messaging for Microsoft Exchange
Managing voice and fax messages through Novell® GroupWise®	The quick reference card for Unified Messaging for IMAP

For information about …	See…
Networking a UM8700 system with one or more messaging servers or voice mail systems from other manufacturers so that they exchange messages over a data network	The online book Digital Networking
Networking a UM8700 system with one or more voice messaging servers or voice mail systems from other manufacturers so that they exchange messages over standard telephone connections	The online book Analog Networking
Networking two or more UM8700 systems to exchange configuration information about Subscriber and Distribution list mailboxes	The online book Digital Networking
Networking two or more UM8700 systems to exchange messages over a data network	The online book Digital Networking
Networking two or more UM8700 Telephony Servers to exchange messages over standard telephone connections	The online book Analog Networking
New features and capabilities in your version of the UM8700 software	The software release notice for that version of the software
Notifying subscribers of new messages through Short Message Service (SMS) support	The online book Short Message Service
Preparing a UM8700 system that is running a previous version of UM8700 so that you can upgrade the server to the current software version	The online book Upgrading and Migrating UM8700
Printing worksheets to use when you first map out the messaging application for a UM8700 Telephony Server	The online book Application Design Worksheets
Providing library documents by fax to callers who request them	The *RightFax Getting Started Guide* and the online book Faxtext

For information about …	See…
Recording names, recording greetings, and changing mailbox settings through an appropriate web browser	The Web PhoneManager application and its online help
Recording names, recording greetings, and changing mailbox settings through the PhoneManager™ utility	The online help and quick reference card for either Unified Messaging for Lotus Notes and Domino or Unified Messaging for Microsoft Exchange
Specific UCConnect programming syntax	The UCConnect online help system
Supporting Voice Intercept Messaging (VIM) features on an Aastra® telephone system	The online book Voice Intercept Messaging
Using basic UM8700 features over the telephone	The appropriate edition of the UM8700 Telephone Quick Reference Card
Using Voice Intercept Messaging (VIM) features with UM8700	The Voice Intercept Messaging quick reference card
Working with Call Processor Mailboxes	The online book Call Processor Mailboxes
Working with Automatic Speech Recognition	The online book Automatic Speech Recognition
Working with the Archive Utility	The online book Mailbox Archive Utility
Removing and Installing Dialogic and Aculab Software Support Components	The system manual, Removing, Installing Dialogic and Aculab Software Support Components
Installing and Administering Message Cache Manager	The online book *Web PhoneManager*
Installing and Administering the Mobility Data Server	The online book Web PhoneManager
A quick reference guide to the UM8700 Mobility Service	UM8700 Mobility Service QRC

Overview

The UNIVERGE® UM8700 software incorporates several different individual programs and operating system services. In the course of a typical day, administrators spend most of their time working with the following two programs, known as client utilities:

- UM8700 Admin
- Reports

This book discusses UM8700 Admin. For information on the Reports utility, refer to the online book, *The Reports Utility*.

NOTE To run the administrative utilities on the System Server platform, you must have both the ability and the permission to log on to the server platform. If you are not the primary administrator of the System Server, see that administrator for assistance.

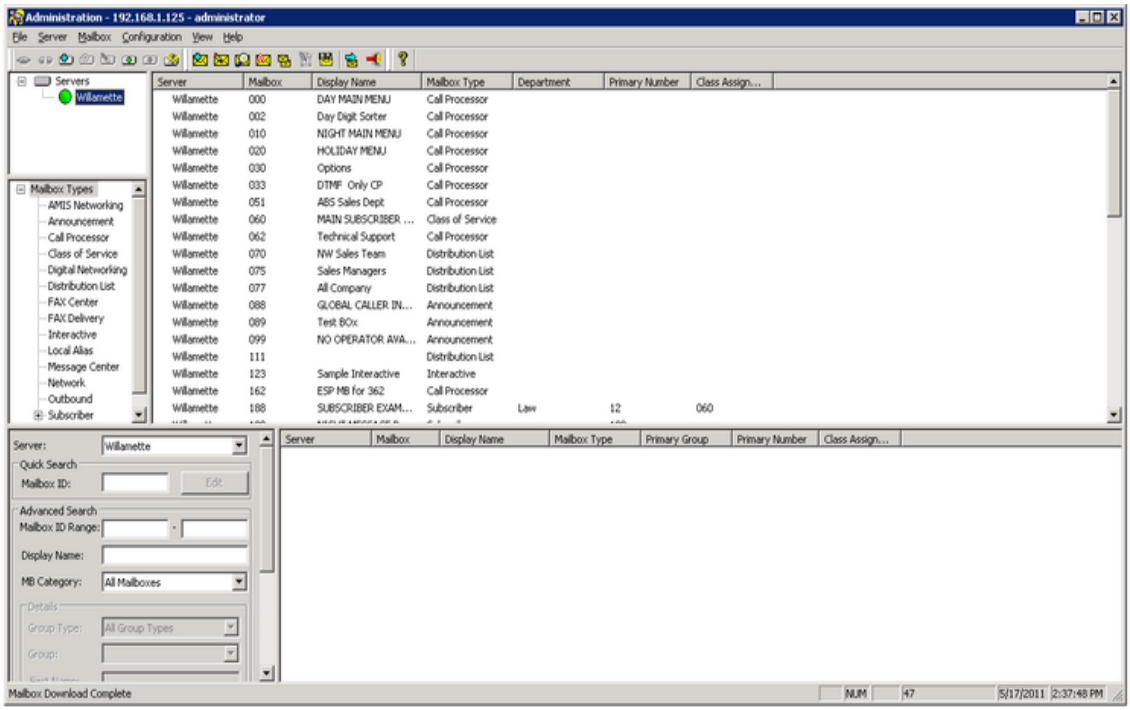
UM8700 Admin

UM8700 Admin gives administrators control over most aspects of a system that can be modified while the system processes are running. The utility is installed on the System Server platform during the initial software installation. UM8700 Admin may be installed on other servers or workstations as well, allowing administrators to administrate UM8700 from a workstation or another server. The remote workstations and servers must be able to communicate with the System Server through the network using Named Pipes or TCP/IP. Administrators can administer any System Server that is part of the same global network of UM8700 systems during a single administrative session. Some of the general tasks you perform with UM8700 Admin are:

- Import and export Network mailboxes
- Create, edit, manage administrator accounts
- Manage Digital Networking correspondents
- Create, edit, delete, and manage the system's mailboxes
- Configure the settings and parameters of the System Configuration tabs including:
- Configure and update the answer mode, which controls how Call Servers handle incoming calls
- Define standard overrides for the answer mode
- Create customized overrides
- Set the system parameters that control how Call Servers perform callouts
- Configure dialing plans and dialing instructions for the Call Servers
- Set the Daily Maintenance time for each server in the system
- Set the default transfer type for Subscriber mailboxes
- Set retention times for reports and messages
- Enable an analog network and configure the AMIS dialing instructions
- Set the message length for subscriber and non-subscriber messages
- Manage the Security Code parameters for the system

- Configure the Subscriber operator telephone number
- Set the default TUI for subscribers
- Set system timers and message actions
- Configure directory prompts, style, and name formatting
- SMS/SMTP -Add, edit, and delete SMS providers and enable simple UM
- Call Routing - Add, edit, and delete route codes
- Create and manage speech commands in the system
- Add, edit, and delete subscriber groups and group types
- Directory Propagation - Configure directory propagation for Digital Networking

NOTE This is not a comprehensive list of UM8700 Admin's capabilities. For more information, see the UM8700 server's online help system.



UM8700 Admin window

Where to Find the UM8700 Client Utilities

Whether the client utilities are installed on the System Server platform itself or on an administrator's own computer, they can be found in the UM8700 Desktop program group within the computer's Start menu.

To start one of the UM8700 client utilities...

- From the taskbar, select **Start** | **Programs** | **UM8700 Desktop**, and then click the name of the utility you want to use.

Starting UM8700 Admin

UM8700 Admin is used to manage the system's mailboxes that make up the site's applications, and to manage the system configuration parameters necessary to the administrative functions of the system. UM8700 Admin gives administrators control over most aspects of the system while the server is running.

You can run UM8700 Admin on client workstations as well as from the System Server platform, allowing remote administration of the UM8700 system. An administrator can run UM8700 Admin from either of the following locations:

- The System Server platform
- A workstation that can communicate with the System Server platform over a LAN or WAN

NOTE The connection to UM8700 Admin defaults using Secure Sockets Layer (SSL). If you do not want to use SSL to connect to the UM8700 System Server using UM8700 Admin, you must append http:// to the server's address to force an unencrypted connection, for example, http://systemserver.domain.com. SSL connections are supported to the home server only. If you are using Global Administration to administer multiple systems, you must append remote server addresses with http://.

If the server does not support SSL, you are prompted to try logging again using an unencrypted connection. If this connection succeeds, the application remembers to use the unencrypted connection in the future. The http:// prefix can be removed at any time once the server is upgraded to a version that supports SSL, and you want to use SSL by default.

To enable an administrator to attach to the System Server from a workstation, you must perform the following tasks:

- Install UM8700 Admin on the workstation.
- Set up an administrator account with appropriate access rights on the System Server or give the administrator the ID and password of an existing account. After being assigned an account and having UM8700 Admin installed, the administrator can then use the utility to manage the system.

To start UM8700 Admin...

1. Select **Start** | **All Programs** | **UM8700 Desktop**, and then click **UM8700 Admin**.
2. If the Logon to Telephony Server dialog box displays, skip to step six. If the Attach to Telephony Server dialog box displays, continue with the next step.
3. In the Connection Type box, select the type of LAN connection that UM8700 Admin should use to communicate with the Telephony Server (Named Pipes or TCP/IP).
4. In the Connection box, identify the System Server to which you want to connect.

If the Connection Type box is set to...	***And...***	***Then the Connection box must contain...***
TCP/IP	The System Server platform is a member of a Windows domain	The name of the System Server platform

TCP/IP	The System Server platform is not a member of a domain	The TCP/IP address of the System Server platform
Named Pipes	You are running UM8700 Admin on the System Server platform	A single period (.)
Named Pipes	You are running UM8700 Admin from a workstation on the same LAN or WAN as the System Server platform	The name of the System Server platform

5. Click **OK**.
6. In the Logon to Telephony Server dialog box, type the User ID and Password of the Administrator account that you want to use, and then click **OK**. If this account name is also a Windows User ID, you may need to specify the home domain as well as the ID itself (for example, HQLAN\MyUserID).

7. **NOTE** If the administrator is currently logged onto Windows and the user is setup to use the Windows Logon feature within UM8700, the Logon dialog will not display and the user will be automatically logged on.

Creating Administrator Accounts

UM8700 Admin provides several levels of security, allowing you to create administrator accounts with different degrees of authority over the UM8700 system. For example, you might want to install a copy of UM8700 Admin at a message desk, but only allow the operators there to edit Subscriber and Distribution List mailboxes; you can accomplish this by creating an Administrator's account with only those permissions.

IMPORTANT Be sure to keep records of all passwords you assign to administrator accounts with permission to configure the system. If the passwords for all accounts are lost, you lose the ability to configure the system and manage other administrator accounts.

IMPORTANT Do **not** give an administrator UM8700 Admin Configuration access unless you intend to give that administrator full control over UM8700 Admin's configuration settings. Likewise, do not give permission to create and edit administration user IDs to anyone who should not have control over all other administrators' account settings.

To create an Administrator account...

1. Start UM8700 Admin and log on using your administrator's name and password.

   NOTE You must have the administrator's permission, Create/Edit Administrator IDs, to create an administrator account.

2. From the menu bar, select **File**, and then **Administrators**. The Administrators dialog box displays.
3. Click **Add** to create a new administrator account. The User ID dialog box displays.
4. Enter the User ID the administrator uses to log on.
5. Enter the administrator's name.
6. In the Comment field, type a short comment to help identify this administrator account.
7. Do one of the following:
   - In the Password field, type a password for the administrator and then confirm the password by re-typing it in the Confirm box. Alternately, leave the boxes blank and let the administrator give the account a password.
   - Check the Windows Logon checkbox to use the Windows domain user authentication Service instead of requiring the administrator to log on separately. When Windows Logon is checked, the Logon to Telephony Server dialog box no longer displays when the administrator starts UM8700 Admin, Reports, Line Status, and Diagnostics utilities.

     IMPORTANT When using the Windows Logon feature, the administrator's user ID must match the administrator's Windows logon user ID exactly. For more information, see Support Windows Logon.

8. In the Logon Limit box, type the maximum number of simultaneous sessions for which this account can be logged on or check **Unlimited** to allow the account as many simultaneous logons as desired.

IMPORTANT To use UM8700 Admin, an account must have at least two logons. The Digital Networking Administration utility also uses two logons; the Reports utility requires only one. The default limit is five. More logons may be necessary if the administrator intends to use the UM8700 Admin and Reports utilities, or multiple copies of either one, at the same time. NEC recommends creating a separate account for each administrator. This enables you to track the changes that each administrator makes to the system.

9. Configure the permissions, mailbox types, and mailbox privileges you want the administrator account to have. Select only the permissions and privileges required for each administrator. The following table shows the different levels of security that can be configured within UM8700 Admin.

The setting...	Allows an administrator to...
Access Levels	***Permissions***
Create / Edit Administrator User IDs	Add, change, or delete other administrator accounts
Enterprise Logon Allowed [1]	Log on to and administer remote servers without having an administrator account on those servers
UM8700 Admin Configuration Access	Change the settings on UM8700 Admin's System Configuration tabs
Mailbox Access	Manage mailboxes - specify the Mailbox Types by selecting the box next to the mailbox type you want to grant permissions
Digital Networking Admin Access[2]	Access the System Server through the Digital Networking Administration utility to propagate mailboxes and recordings
Reports Access	Run the Reports utility and generate reports
Diagnostics Access	Run the Diagnostic utility and turn file logging on and off

Mailbox Types	***Permissions***
Manage mailboxes of specific types or all mailbox types	Select each individual mailbox type or click the **Select All** button to select all mailbox types. Click the **Clear All** button to clear all mailbox types.
Mailbox Privileges	***Permissions***
Edit Mailboxes	Change the settings within mailboxes. If Edit Mailboxes is cleared but Mailbox Access is selected, the administrator may view the settings of any mailbox whose type is selected under Mailbox Types
Add/Delete Mailboxes	Add or Delete mailboxes in the system
Edit Subscriber E-Mail configuration	Change settings on the E-mail tab of Subscriber mailboxes
Edit Subscriber Fax configuration	Change settings on the Fax tab of Subscriber mailboxes
Establish Subscriber Trusted Logon [3]	Configure subscriber devices as Trusted Voice devices.

Note 1 You must select the Allow Enterprise Logons check box in the correspondent Digital Networking mailbox for this setting to work properly.

Note 2 The Digital Networking Admin Access setting does **not** give the administrator access to the Digital Networking Administration utility. Instead, the setting provides Digital Networking Administration administrator accounts with the mailbox access they need to support mailbox and directory propagation. For more information about mailbox and directory propagation, refer to the online books *Digital Networking* and *Managing an Enterprise System*.

Note 3 Administrators must have the Establish Subscriber Trusted logon to enable a Trusted Voice device in a Subscriber mailbox. In addition, you must enable Allow Trusted Logons on the Database dialog box of the Main tab in UM8700 Configuration.

10. Click OK to exit the User ID dialog box, and then click OK again to exit the Administrators dialog box.
11. Once you have created a new administrator account and give the associated user ID to the administrator who uses it, be sure to advise the administrator to give the account a password as soon as possible if one has not already been specified.

Supporting Windows Logon

When the UM8700 Admin, Reports, Line Status, and Diagnostics utilities start, they normally require an administrator to log on using an ID and password specific to the UM8700 software. However, UM8700 administrator accounts contain a Windows Logon option that allows these utilities to bypass this process. If the Windows Logon option is set for an administrator, the utilities request authentication information from the Windows authentication service through which the administrator logged on to the LAN or the server platform.

Depending on the actual location where the administrator logged on, the authentication service might be running directly on the server platform, on a separate authentication server, or on a

domain controller. Before you can safely set the Windows Logon option for any administrator's UM8700 account, you must prepare the administrator's workstation as follows:

- Make note of the account's exact user ID

NOTE If an administrator wants to log on to the UM8700 utilities using an ID other than the one that is used to log on to the workstation the administrator is using, set the Account as part of the operating system policy at the workstation for the User ID (or Domain/ID combination) that is used to log on to the operating system there.

Changing an Administrator's Password

If you are authorized as an administrator to Create/Edit Administrator User IDs, you can use the following procedure to change the passwords of administrator accounts.

To change an administrator's password...

1. Start UM8700 Admin and log on to the Telephony Server.
2. From the menu bar, select **File**, and then **Administrators**.
3. From the Server list box within the Administrators dialog box, select the System Server where you want to apply this change.
4. In the Administrators dialog box, select the appropriate account and click **Edit**.
5. In the Password box, type the new password that you want to apply to the account.
6. In the Confirm Password box, type the new password again.
7. When you have finished entering the new password, verify that you are changing the correct account and click **OK**.

IMPORTANT Be sure to keep records of all passwords you assign to administrator accounts with permission to configure the system. If the passwords for all accounts are lost, you lose the ability to configure the system and to manage other administrator accounts.

Working with the System Configuration tabs

UM8700 Admin's System Configuration tabs allow you administer the settings and parameters required to set up the environment for the various mailboxes and features that comprise the UM8700 application. The settings and parameters of the System Configuration tabs are system-wide settings; they control functions of the entire UM8700 system, which include the System Server and all of the Call Servers within the system. Many of the settings are default settings that can be changed or overridden individually within a particular mailbox. The System Configuration tabs include:

- **Answer Mode tab** - controls how each Call Server handles incoming calls. This tab is discussed in the chapter, "Creating an Automated Attendant"
- **Availability Announcements tab** – controls announcements associated with various availability states.
- **Availability Sources tab** – used for setting up sources of availability information, such as calendaring or Lync.
- **Callout tab** - controls how Call Servers perform callouts to telephone devices and pagers
- **Dialing tab** - controls what telephone numbers each Call Server is allowed to dial
- **Environment tab** - contains system-wide parameters that control:
  - The Daily Maintenance time for each server in the system
  - The default transfer type for Subscriber mailboxes
  - The retention times for reports and messages
- **Networking tab** -contains settings to activate an analog network and configure the AMIS network callout parameters
- **Messaging tab** - contains system-wide parameters that control messaging options for Subscriber mailboxes such as:
  - The message length for subscriber and non-subscriber messages
  - The Security Code parameters for Subscriber mailboxes
  - The Web PhoneManager Security Code Reset parameters for Subscriber mailboxes
  - The default subscriber operator's device number
  - The parameter to enable e-mail access for subscribers
  - The default number of rings to wait during automated attendant transfer attempts
  - The default TUI for subscribers
- **Timing tab** - contains system timers and parameters to control when messages are marked as read
- **Directory tab** - contains parameters to configure how the directory prompts a caller, the style in which the directory is presented, and the Display Name formatting
- **SMS/SMTP** -contains parameters and fields for enabling, adding, editing, deleting SMS providers, and configuring the Simple UM feature. Refer to the online book, *Short Message Service* for information on how to configure this tab.
- **VIM** - contains the information needed to support Voice Intercept Messaging (VIM) for subscribers. VIM is available only on systems that are integrated with telephone systems

that support the VIM feature. VIM is a licensed feature of NEC and this tab is available only if the VIM feature is enabled on the license key. For more information about configuring VIM support, see the *Voice Intercept Messaging* online book.

- **Call Routing** - contains fields for adding, editing, and deleting route codes used in the Answer Mode. Refer to the chapter on "Creating an Automated Attendant" for information on this tab.
- **Speech tab** - contains fields and parameters to create and manage speech commands in the system. Refer to the chapter "Speech Commands" for information on this tab.
- **Group Management tab** - contains fields and parameters to manage subscriber groups and group types. Refer to the chapter "Group Management" for information on this tab.
- **Directory Propagation** - contains fields and setting to configure directory propagation for Digital Networking. Refer to the online book, *Digital Networking* for information on how to configure this tab.

This section provides an overview of some of the System Configuration tabs. For more information on these tabs press F1 from UM8700 Admin window or click **Help** on any of the tabs.

Dialing tab

The Dialing tab allows you to set up a dialing plan for each Call Server in the system, which it uses to validate telephone numbers entered by outside callers and subscribers. The Dialing tab tables allow the Call Server to determine if a dialed telephone number is valid, if the subscriber is allowed to make this type of call, and how the number is dialed. For example, if a subscriber enters a six-digit telephone number, the Call Server can look up the number on the dialing plan, and then prompt the subscriber that the number is invalid. The subscriber can then enter the correct seven-digit number.

The dialing plan also gives the Call Server dialing instructions for telephone numbers and indicates the call type: international, long distance, local, or extension. With the information from the dialing plan, the server can correctly place calls to any telephone number. The Call Server uses the call type information it receives from the dialing plan to determine if a call is allowed. For example, if a subscriber sends a fax to a long-distance number, the server uses the dialing plan to determine call type. It then checks the subscriber's mailbox to see if the subscriber has long distance callouts allowed. If so, it places the call; otherwise it advises the subscriber that the call is not allowed.

The dial plan a subscriber uses is determined by the Switch Section associated with the Subscriber mailbox. The Switch Section is selected on the Main tab of the Subscriber Mailbox. It controls the Switch Section of the Subscriber mailbox as well as the Switch Section of the category default Extension device configured in the mailbox. If the Switch Section of the default Extension device is changed on the Device tab, the Switch Section on the Main tab changes as well. The dial plan of any Call Server (the first one found) that implements this Switch Section is used as the applicable Dial Plan for the subscriber. This allows subscribers to do callouts based on the location of the Call Server, which may be in another country (international) or area code (long distance).

A default dialing plan is created at the time of database initialization. This dialing plan may be used with any or all Call Servers in the system or a separate dialing plan can be created for each individual Call Server.

NOTE The Dialing Plan must also allow for subscriber Availability and Personal Assistant settings. Call Servers calling subscriber devices adhere to the Dialing Plan.

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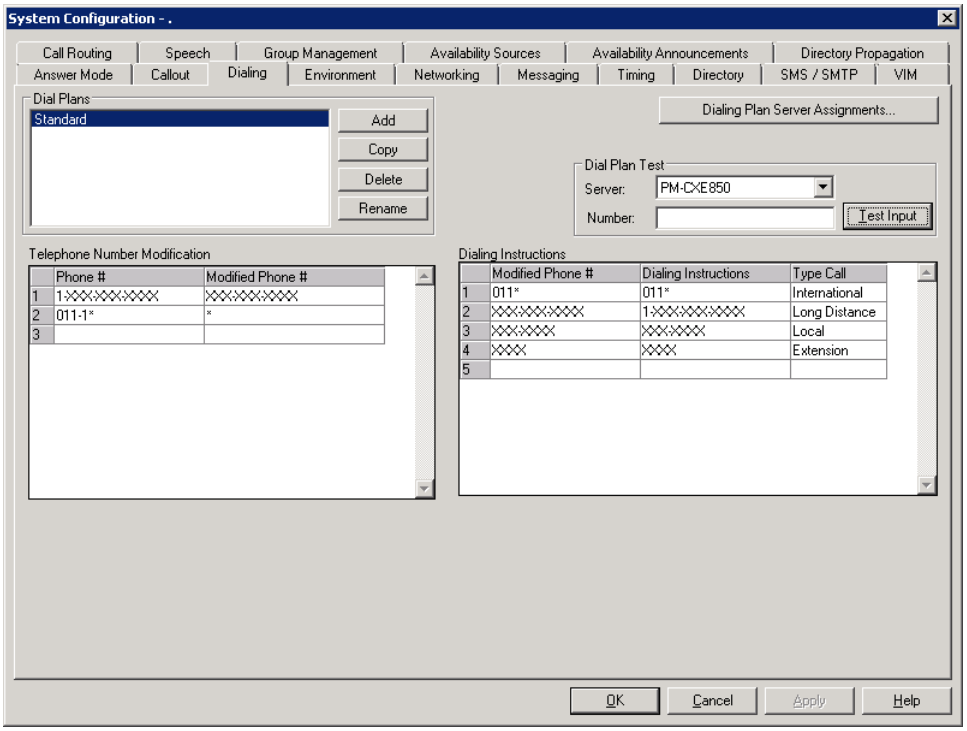
NOTE The Dialing Plan must also allow for subscriber Availability and Personal Assistant settings. Call Servers calling subscriber devices adhere to the Dialing Plan.



Dialing Plans

Dial Plan List - Lists the current dial plans available in the system.

Add button - To add a new Dial Plan click **Add**. The Add "Dial Plan" text box displays. Type a name for the new dial plan, and then click **OK**.

Copy button - Highlight the Dial Plan you want to copy, and then click the **Copy** button. The Add "Dial Plan" text box displays. Type a name for the new dial plan, and then click **OK**.

Delete button - Highlight the Dial Plan you want to delete, and then click **Delete**. Click **Yes** to confirm the deletion. The plan is deleted.

Rename button - Highlight the Dial Plan you want to rename, and then click **Rename**. The Edit "Dial Plan" Name text box displays. Type a new name for the Dial Plan, and then click **OK**.

Dialing Plan Server Assignments button - The Dialing Plan Server Assignments button displays the Server Assignments dialog box. The dialog box lists the Call Servers in the environment and the current Dial Plan assigned to it. To change the Dial Plan assignment, click the associated Dialing Plan Name cell, and then click the drop-down box. Select the Dial Plan you want to use for the Call Server, and then click **OK**.

Dial Plan Test

Server - Click the drop-down box to select the Call Server you want to perform a dial plan test.

Number - Enter the telephone number you want to use as a test number.

Test button - Click the Test button after you have entered the Call Server name and the telephone number. The test results are displayed describing the Call Type used to make the test call, or prompts an error that the test number failed.

NOTE The test button does not initiate an actual call; it uses the number entered to simulate a call through the Dial Plan.

Telephone Number Modification table - Use this table to modify existing telephone numbers. Specify an original number pattern and the number pattern to which it should be modified. Valid characters are 0–9, *, X, and - (hyphen). For example, the Telephone Number Modification table is commonly used to standardize long-distance numbers before the Dialing Instructions table acts on them. If a single Call Server is serving more than one location, the destination telephone numbers for some long-distance callouts on that server might include the digit 1 before the area code while others might not. You can ensure that the Call Server handles all long-distance calls correctly in such a case by adding the following entry to the Telephone Number Modification table: Phone # **1-XXX-XXX-XXXX** Modified Phone # **XXX-XXX-XXXX**. Since no long-distance telephone numbers would be preceded by a 1 when they arrived at the Dialing Instructions table, the table needs one entry only to deal with long-distance callouts. Numbers that do not match entries in the Phone # column are passed to the Dialing Instructions table unchanged.

Dialing Instructions table - Use the Dialing Instructions table to enter dialing instructions for modified telephone numbers. This table then passes the dialing instructions and call type information to the Call Server. Valid characters are 0–9, *, X, and - (hyphen). Select the call type of the Dialing Instructions from the drop-down list in the **Type Call** column that matches the type of call destination for which the dialing instructions are intended.

IMPORTANT Some telephone systems produce audio when sending calls using least-cost routing, which can confuse call progress. Use direct trunk access codes or retrain call progress, as needed.

Type Call - The call types are as follows:

- Extension - Calls within the local and networked telephone system
- Local - Calls within the same local area code (an area code is not required to dial)
- Long Distance - Calls to numbers outside the local area code
- International - Calls to numbers outside the same country code (See the International call example at the end of this topic.)

Call types place limits on the following types of callouts by subscribers within UM8700:

- Immediate Message Notification and Daily Message Reminder callouts
- TUI Live Reply (to message sender ANI)
- TUI dial number

- Speech application “Dial” (number)
- Speech application “Call” (contact)
- Speech application “Call Back” (message sender ANI)
- Web PhoneManager Call List Live reply
- Web PhoneManager message Live Reply
- Web PhoneManager device number edits
- Mobile application dial
- Mobile application message callback
- Mobile application contact dialing
- Mobile application Call List dialing to non-subscribers

Calls to subscribers are not restricted based on the caller. For example, if the caller is an unknown outside caller or a subscriber that is only allowed to dial an extension, neither caller is restricted from dialing a subscriber device that is classified as local, long distance, or international. Therefore, the following calls are not restricted.

- Auto Attendant calls
- Speech application Rings
- Speech application Locates
- Mobile application Directory dialing
- Mobile application Call List dialing to subscribers
- Admin number entries (with the exception of Immediate Message Notification numbers)

International Calls - The Dial Plan classification of International should not be restricted simply to mean another country. Use it to classify a number based on the location of the Call Server. For example, a multi-national corporation with a Call Server in France (Country code 33) and a Call Server Australia (Country Code 61):

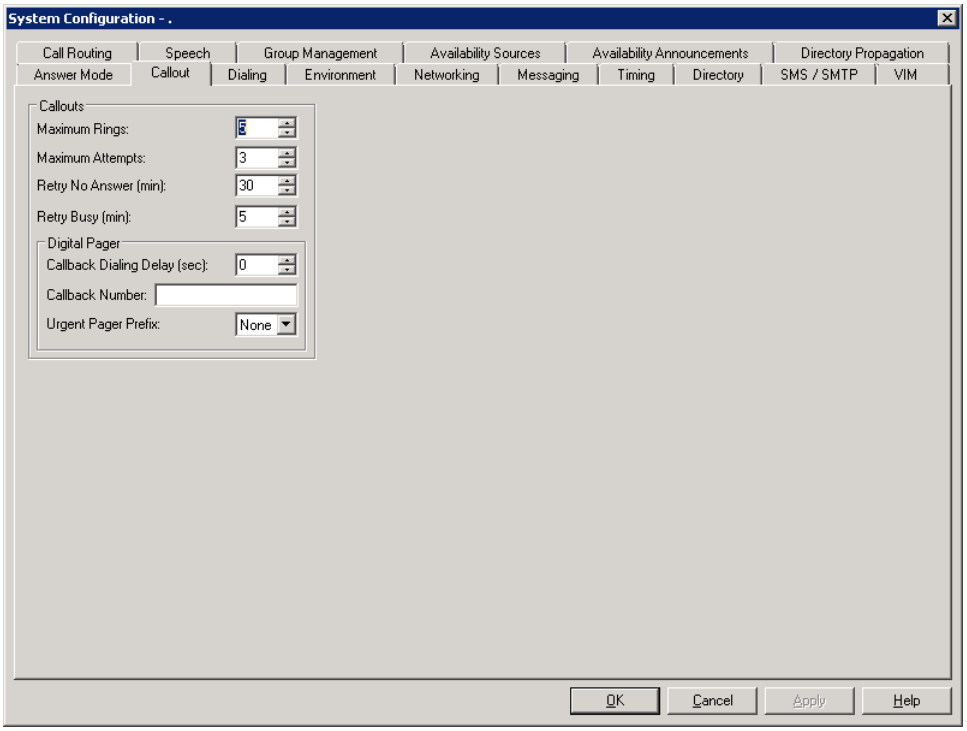
- The Dial plan for the Call Server in France (Country code 33) might classify UK numbers (Country Code 44) as "Long Distance."
- The Dial Plan for the Call Server in Australia (Country Code 61) might classify UK numbers (Country Code 44) as "International."
- The Dial plan for the Call Server in France (Country code 33) might classify New Zealand numbers (Country Code 64) as "International."
- The Dial Plan for the Call Server in Australia (Country Code 61) might classify New Zealand numbers (Country Code 64) as "Long Distance."
- Results:
- Subscriber A in Australia who has Long Distance and International dialing privileges checked can call a UK number or a New Zealand number
- Subscriber B in Australia who does not have International dialing privileges checked (has "Long Distance" checked) cannot call a UK number but can call New Zealand.
- Subscriber C in France who has Long Distance and International dialing privileges checked can call a UK number or a New Zealand number
- Subscriber D in France who does not have International dialing privileges checked (has "Long Distance" checked) cannot call a Zealand number but can call the UK.

Example Summary:

Subscriber	*Location*	*Long Distance*	*International*	*Can Call UK (CC44)*	*Can Call NZ (cc 64)*
A	AUS (cc 61)	Yes	Yes	Yes	Yes
B	AUS (cc 61)	Yes	No	No	No
C	France (cc 33)	Yes	Yes	Yes	Yes
D	France (cc33)	Yes	No	No	No

Callout tab

The Callout tab allows you to configure how the Call Server performs callouts on behalf of the subscriber.



Maximum Rings - Specify the number of times, from 1 to 9, that the Call Server allows telephones to ring when making callouts before assuming that no one answers. The default is five rings.

Maximum Attempts - Specify the number of times, from 1 to 9, that the Call Server calls out to a busy or answered telephone number. The default is 3 times.

Retry No Answer (min) - Specify the number of minutes, from 1 to 99, that the Call Server waits before re-dialing callouts to unanswered telephone numbers. The default is 30 minutes.

NOTE Subscriber message notification callouts are controlled by the *Wait* column in their personal call lists. Personal call list information can be set on the Msg Notification tab of the Subscriber Mailbox dialog box.

Retry Busy (min) - Specify the number of minutes, from 1 to 99, that the Call Server waits before re-dialing callouts to busy telephone numbers. The default is 5 minutes.

NOTE Subscriber message notification callouts are controlled by the Interval (min) box on the Msg Notification tab of the Subscriber Mailbox dialog box.

Digital Pager

Callback Dialing Delay (sec) - Specify the number of seconds, from 0 to 99, that the Call Server waits before dialing the pager callback number or personal identification number (PIN). This delay goes into effect after the Call Server detects a connection. The default is 0 seconds.

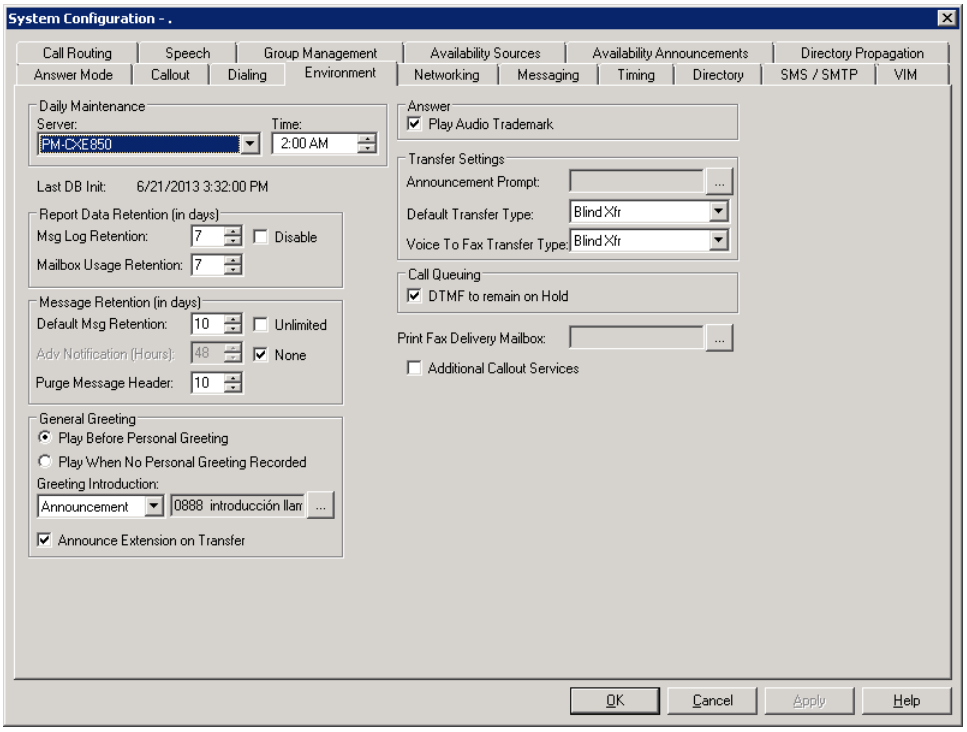
Callback Number - Specify a call back number of 17 digits or less to be sent to the digital pager when a message is received in a Subscriber mailbox. Typically, you would specify the main system telephone number. You can also add an X and Y character. The X character adds the sending subscriber's mailbox number to the display. The Y character adds the caller's ANI or CPID number to the display, if available. This feature is referred to as the "fast page" feature.

Urgent Pager Prefix - Specify a single-digit prefix, using the numbers 0–9 or the characters A, B, C, D, *, or #, that signals an urgent messages on digital pagers. The default is None. Use caution when specifying star (*) and pound (#). The star typically sends a space or dash to a digital pager, which does not display. The pound typically tells the paging company to hang up.

NOTE You must specify the message as Urgent for the Urgent Pager Prefix to be sent.

Environment tab

The Environment tab allows you to configure various system-wide features. The fields and settings of this tab are as follows:



Daily Maintenance

Server - Click the drop-down box in the Server field to select the server for which you are setting the Daily Maintenance time. During the Daily Maintenance routine, the system purges voice messages that have exceeded the storage limit of the associated Subscriber mailboxes. It also creates a snapshot of the database for the daily backup procedure to use.

Time - Use the Up and Down arrows to set the time you want the Scheduled Daily Maintenance to run for the selected server. The default is 2:00 AM. Set the Daily Maintenance for a time when the server is in low usage, because maintenance activities take longer while calls are being processed. The server continues to process calls during Daily Maintenance.

Last DB Init - Displays the date and time when the database was last initialized.

Report Data Retention (in days)

Msg Log Retention - Specify the number of days, from 1 to 60, that the System Server saves message log information. The default is 7 days. This information uses disk space, which affects the space available for messages. However, NEC recommends that you do not set this field smaller than two days, because you might need this information for troubleshooting the system or the telephone system.

Disable - Select this box if you do not want the system to save message log information.

Mailbox Usage Retention - Specify the number of days, from 1 to 60, that the System Server saves statistical and report information about calls to the system. The default is 7 days. This information uses disk space, which affects the space available for messages.

However, NEC recommends that you do not set this field smaller than two days, because you might need this information for troubleshooting the system or the telephone system.

Message Retention (in days)

Default Msg Retention - Specify the number of days, from 1 to 99, that the System Server saves messages. The default is ten days.

NOTE Changing the Default Message Retention does not affect existing Subscriber and Mailbox COS settings; it is the system default only. New mailboxes will have the new retention time set by default.

Unlimited Default Msg Retention - Select this box to enable unlimited default message retention.

Adv Notification (Hours) - Specify the number of hours, from 1 to 9999, that subscribers receive advanced notification for messages scheduled for automatic deletion. When you set this field, subscribers hear "*This message is scheduled to be deleted*" for messages that have reached the maximum retention time, allowing subscribers to save the messages if desired. You cannot set this value until the None box is cleared.

None - Select this box if you do not want subscribers to receive advanced notification for messages scheduled for deletion. The default is selected.

Purge Message Header - Specify the number of days subscribers hear envelope information about a message after it is deleted by the Daily Maintenance routine. If the envelope is left in the subscriber's mailbox longer than the allowed retention time, it is automatically purged during Daily Maintenance. This applies to locally stored voice and fax messages only.

NOTE To purge the message header along with the message at Daily Maintenance, change this setting to zero (0).

General Greeting

Play Before Personal Greeting - Choose this option if you want the system-wide general greeting to play always before subscribers' personal greetings.

Play When No Personal Greeting Recorded - Choose this option if you want the system-wide general greeting to play only if subscribers do not have a personal greeting recorded.

Greeting Introduction - Select an Announcement mailbox used as the system-wide general greeting. The Announcement mailbox must exist prior to selecting it.

Announce Extension on Transfer - Select the checkbox to have the automated attendant announce the extension number to callers when transferring from the automated attendant directory. For example, a caller using the 1-Key Directory action to find a subscriber hears the prompt, *"transferring to John Doe at extension 100*."

Answer

Play Audio Trademark - Select this box to play the UM8700 audio trademark when a call is answered by the automated attendant.

Transfer Settings

Announcement Prompt - Specify the Announcement mailbox that you want the Call Server to use instead of the default transfer prompt, "*One moment, please*." Click **Browse** to select an existing Announcement mailbox.

Default Transfer Type - Specify the default transfer type: Blind Xfer, Monitor Xfer, or Transfer. This setting is specified initially during Setup.

Voice to Fax Transfer Type - Specify a default transfer type for the Call Server to use when transferring calls to a fax server platform: Blind Xfer, Monitor Xfer, or Transfer. This setting is initially specified during Setup.

Call Queuing

DTMF to remain on Hold - Select this box to specify whether a caller needs to press a DTMF key to continue holding. The box is selected by default. You should select this box for telephone systems that do not provide positive disconnect supervision to the Call Server (such as a loop current drop or a fourth-column DTMF). The Call Queuing feature is fully supported in a single Call Server, or in a System Server with call services environment.

IMPORTANT NEC recommends that you do not use the Call Queuing feature in a multiple Call Server environment. A Call Server's call queuing list is independent from a call queuing list on any other Call Server in the system. For example, the spoken order, "*You are the third caller*," on Call Server A does not consider possible callers in queue on Call Server B for the same extension. Using the Call Queuing feature on multiple Call Servers that serve the same subscribers negates the intended design of the feature, and should be used only if the resulting operation is acceptable.

Print Fax Delivery Mailbox - Specify the Fax Delivery mailbox that the system should use by default to deliver fax messages. Click **Browse** to select an existing fax delivery mailbox.

NOTE This field must be configured to allow subscribers to print to a default fax number over the telephone and is used only with the Octel Aria TUI emulation.

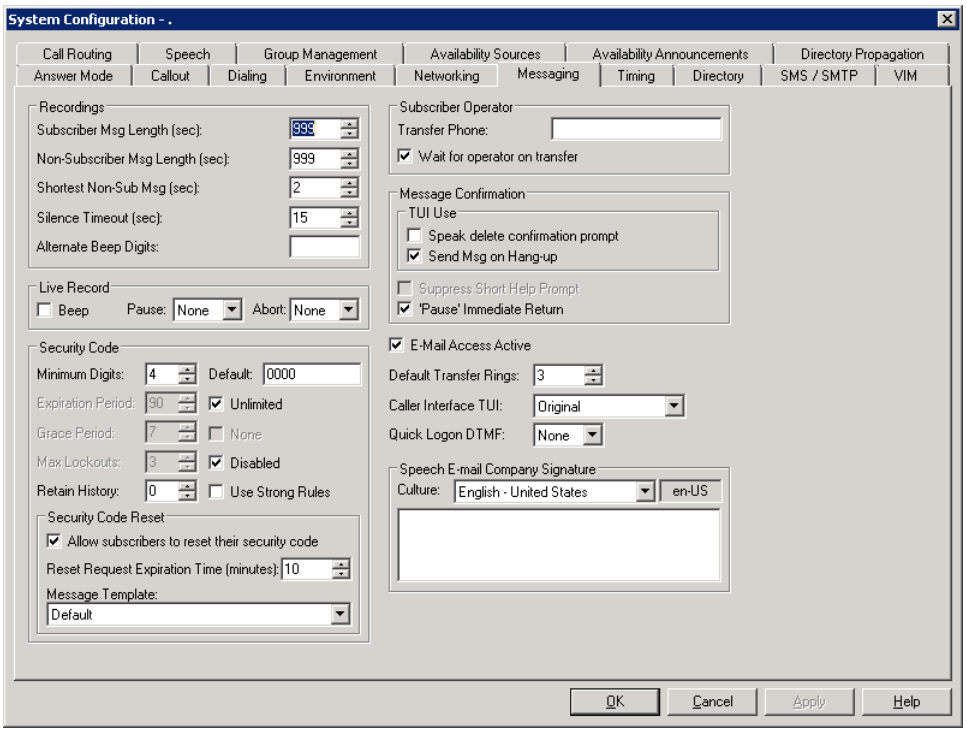
Additional Callout Services - Select this box if you want the main subscriber menu to include the option of placing outside calls from within subscriber mailboxes. If this box is selected, subscribers hear the following prompt as part of their main menu: "*For additional services, press nine*." After pressing nine, they hear the following prompt, "*To place a call, press one*."

NOTE To support Additional Callout Services, the Dialing Plan must be configured to allow the type of callout the subscriber is attempting to make. The Subscriber mailbox must have local or long-distance call-out permissions set. The Callout Limits Settings of the Switch Section to which the Subscriber mailbox belongs must also be configured to allow callouts.

Messaging tab

The Messaging tab allows you to configure how the system handles messaging features on a system-wide basis. The fields and settings of this tab are as follows:

IMPORTANT Changing some of these fields can adversely affect system operation.



Recordings

Subscriber Msg Length (sec) - Specify the maximum length, from 1 to 2700 seconds (45 minutes), for names, personal greetings, announcements, and messages recorded by subscribers while logged on to their mailboxes. The default is 999 seconds (almost 17 minutes).

Non-Subscriber Msg Length (sec) - Specify the maximum length, from 1 to 2700 seconds (45 minutes), for a message recorded by a non-subscriber. For example, this setting controls the length of a message recorded by the user of a visitor mailbox for the subscriber who sponsors that mailbox, or a message gathered from an outside number by an outbound mailbox. The default is 999 seconds (almost 17 minutes).

NOTE The non-subscriber message length for each subscriber can be adjusted individually by changing the Outside Caller Message Limits parameter on the Features tab of the Subscriber mailbox.

Shortest Non-Sub Msg (sec) - Specify the minimum message length, from 0 to 99 seconds, that is recorded from a non-subscriber. Specifying 0 tells the system to record and send all messages. The default is 2 seconds.

Silence Timeout (sec) - Specify the amount of time, from 1 to 25 seconds, that the Call Server should wait, without receiving any sound or DTMF information, before leaving the record mode and prompting the caller. The default is 15 seconds.

Alternate Beep Digits - Specify one to four DTMF tones used to prompt callers to begin recording. Use the DTMF tones associated with telephone DTMF keys: 0–9, A–D, # and *. If you specify more than one tone, the Call Server plays them sequentially. Leave this field blank to use the default recording tone.

NOTE These tones are intended for use with external devices, such as pulse-to-tone converters.

Live Record

Beep - Select this box if you want the Live Record feature to beep when it begins recording.

Pause - Specify the DTMF character that causes Live Record to pause and resume the recording process. Valid settings are None, 0–9, A–D, #, and *.

NOTE The settings for Pause and Abort must have different values. However, both Pause and Abort can have None as their setting at the same time. If a DTMF is pressed during a Live Record recording, the Call Server interrupts the recording and evaluates the DTMF key. If the DTMF key does not match the Pause or Abort keys configured for Live Record, the recording is restarted immediately. This means that actual DTMF tones are not recorded in a message.

Abort - Specify the DTMF character that causes Live Record to hang up and save the message in the specified subscriber mailbox. Valid settings are None, 0–9, A–D, #, and *.

Security Code

Minimum Digits - Specify the minimum number of digits required for security codes, from 2 to 15 digits. The default is 4 digits.

NOTE If you change the minimum digits required, it does not affect existing Subscriber mailboxes. This value is the minimum security-code length for all new Subscriber mailboxes and for any existing Subscriber mailbox when the security code is changed or reset.

Default - Enter a default security code for Subscriber mailboxes. This value is the default security code for all new Subscriber mailboxes and for any Subscriber mailbox for which the password is reset. The length of the default security code must be at least as long as the number in the Minimum Digits box and no longer than 15 digits.

NOTE Changing the default security code does not change the security code for existing Subscriber mailboxes.

Expiration Period - Specify the number of days, from 1 to 365, that a security code can be used until it must be changed. For example, if you specify an expiration of 30, subscribers must change their security codes every 30 days. This field is a security feature to force subscribers to change their security codes at specified intervals. The default is Unlimited. This field cannot be modified until the Unlimited check box is cleared.

Unlimited - Allows subscribers to keep security codes an unlimited length of time. This is the default setting. When this box is cleared, an expiration period for security codes must be specified.

Grace Period - Specify the number of days, from 1 to 31, that the system allows subscribers to log on to their mailboxes using expired security codes. Once the grace period expires, a subscriber can log on only to change the security code in PhoneManager. The default is 7 days. This field cannot be modified until the None check box is cleared.

None - Means that subscribers have no grace period to log on to their mailboxes using expired security codes. When a security code expires, a subscriber can log on only to change the security code in PhoneManager. When this check box is cleared, you must specify a grace period for security codes.

Max Lockouts - Enter the maximum number of times a subscriber can call the system and attempt to log on to a Subscriber mailbox before the mailbox is locked. After a subscriber is locked out, access to the mailbox is denied until the administrator resets the security code and unlocks the mailbox. If the logon attempts are made from Unified Messaging Connection Manager or Web PhoneManager, each new password that a subscriber enters counts as a logon attempt.

Disabled - Select this box to disable the subscriber lockout feature. If this box is selected, subscribers can enter invalid security codes repeatedly without being locked out of their Subscriber mailboxes. Failed log on attempts are logged to the Application log of the Windows Event Viewer.

Retain History - Specify the number of unique passwords subscribers must create before they are allowed to repeat them. If this value is set to zero, the setting is disabled.

NOTE To override this setting, clear the Use Advanced Security Policy check box on the Features tab of the Subscriber mailbox.

Use Strong Passwords - When selected, subscriber passwords must meet the following requirements: The digits may not form a simple arithmetic sequence; the password must contain at least three unique digits; the complete mailbox number may not be part of the password.

NOTE To override this setting, clear the Use Advanced Security Policy check box on the Features tab of the Subscriber mailbox.

Security Code Reset

Allow subscribers to reset their security code - Select this check box to enable the field, "Allow Subscriber to Reset Security Code" feature on the Main tab of Subscriber mailboxes. The feature allows subscribers to reset their mailbox security code from Web PhoneManager.

Subscribers verify their mailbox number, or e-mail address to confirm the security code reset. An e-mail is sent to the subscriber's e-mail address specified on the Main tab of the Subscriber mailbox with an imbedded URL that allows them to enter a new security code and log on to Web PhoneManager.

Reset Request Expiration Time (minutes) - Enter the number of minutes the security code reset link is valid from the time of creation (1-1440 minutes). The default is ten minutes.

Message Template - Enter the XML message template used to describe the reset security code procedure to subscribers. By default, the Message Template is configured to use the system provided default template file, DefaultSecurityCodeResetMessage.xml. For more information on customizing XML message templates, refer to the topic "Modifying Message Phrase Template XML files."

NOTE If the Security Code Reset Message Template file is invalid (for example, it is missing); the file name appears in red to alert you that the current selected file is invalid.

Subscriber Operator

Transfer Phone - Specify the operators telephone number to which subscribers, while logged on to their Subscriber mailbox, are transferred after dialing 0. Transfer can occur only between the time a subscriber logs on to the mailbox and the time that subscriber starts listening to voice messages.

Wait for operator on transfer - Select this box if the Call Server should wait for an operator to answer when transferring a call to the operator. This box is selected by default.

E-mail Access Active - Select this check box to enable E-mail Access throughout the system. Clear this check box to disable E-mail Access throughout the system. The box is cleared by default.

IMPORTANT If this box is cleared, messages are not delivered to subscribers configured to use Unified Messaging such as UM for Exchange, Notes, or IMAP.

Default Transfer Rings - Specify the default number of rings to wait on transfer, from 1 to 99 that the system uses to automatically configure newly created Subscriber mailboxes. The default is 3 rings. Device settings within the Subscriber mailbox can override this field.

Message Confirmation

Speak delete confirmation prompt - Indicate if the system should confirm message deletion with the prompt "*To confirm that you want to delete this message, press 4 again*." This parameter provides backward compatibility with earlier software versions. The field is cleared by default.

Send Msg on Hang-up - Select this box to allow subscribers to send a voice message by simply hanging up, as opposed to pressing a key to stop recording, and then pressing another key to send the message. The box is selected by default.

IMPORTANT Do not leave this box selected if the Call Server is connected to a PBX that does not support station-side disconnect supervision.

Suppress Short Help Prompt - Select this box to suppress the help prompt, "*To leave a message, press 1. For other options, press 9*." This prompt is normally heard by callers who are directed to a Subscriber mailbox in which there is no personal greeting recorded. This box is selected by default.

Pause Immediate Return - Select this box if you want subscribers to immediately return to the current messages after pausing message playback and selecting an action in the paused menu, as opposed to returning to the beginning of the message queue.

Caller Interface TUI - Select the type of Telephony User Interface (TUI) appropriate for the system.

IMPORTANT Before you select an alternate TUI type, be sure that the TUI is supported by the subscriber's default prompt language. To determine whether a prompt language supports an alternate TUI type, refer to the Software Release Note that supports this version of software or contact Technical Support.

NOTE Alternative TUIs are licensed features and are available for purchase from NEC.

Quick Logon DTMF - Select the key that subscribers press to go directly to their mailboxes when calling their own phone number.

IMPORTANT You must assign the Access Msgs action to the selected key in all answer mode Call Processors. The Arguments field must also be blank.

Speech E-mail Company Signature

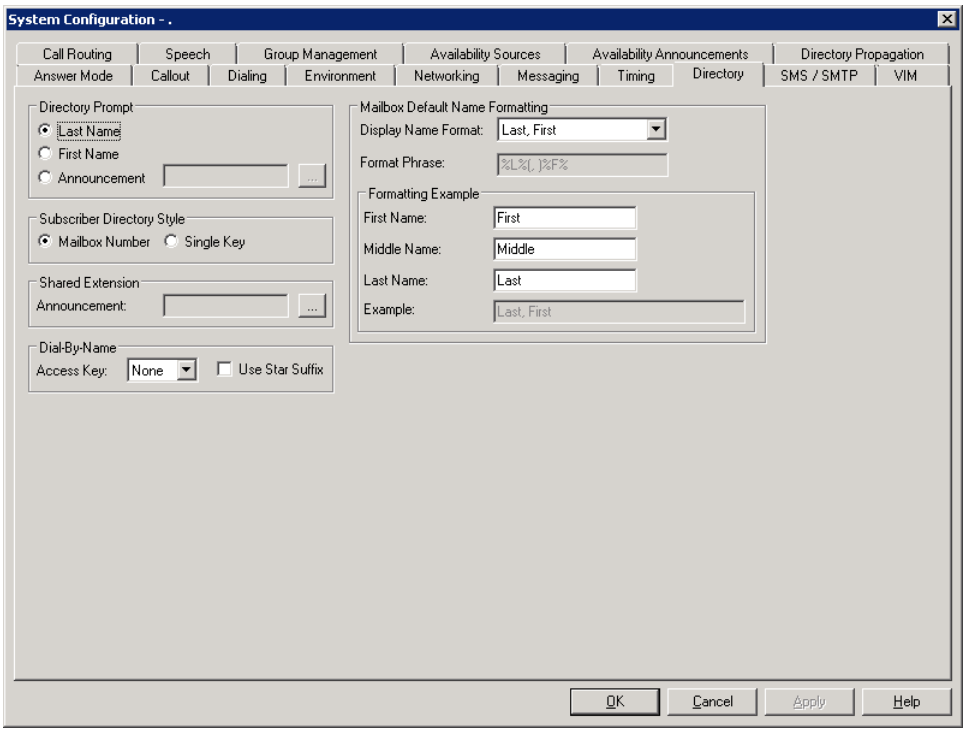
Culture - The current speech recognition culture and culture code of the system.

Signature Field - Enter the company-wide e-mail signature that subscribers send when using Simple UM unless otherwise defined in the Subscriber mailbox Speech tab.

Directory tab

The Directory tab allows you to specify how you want callers to request directory information, by last either name or first name. You can configure the dial-by-name access key, the shared extension announcement message, and set the name formatting. The fields and settings of this tab are as follows:

IMPORTANT Be sure to enter the subscriber's complete names in their Subscriber mailbox. The directory search and match function is based on the name in the Subscriber mailbox.



Directory Prompt

Last Name - Click if you want callers to be prompted to enter last names when requesting directory information. The Call Server prompts callers, "*Enter the first few letters of the person's last name. For the letter Q, use the seven key. For the letter Z, use the nine key. Please enter the letters now.*"

First Name - Click if you want callers to be prompted to enter first names when requesting directory information. The default is First Name. The Call Server prompts callers, "*Enter the first few letters of the person's first name. For the letter Q, use the seven key. For the letter Z, use the nine key. Please enter the letters now*."

IMPORTANT The Directory Prompt setting must be consistent with the current mailbox display name format. If they are not, existing mailbox display names will need to be updated by an administrator for this feature to work properly.

Announcement - To use a custom directory prompt, click **Browse** to select an existing Announcement mailbox from the list.

Subscriber Directory Style

Mailbox Number - Select this option to provide subscribers using the directory function, when forwarding or creating a message, with the primary extension number of a

subscriber. If this option is selected, the Call Server reads back directory entries in a form similar to the following example: "*Leslie Davidson: 3499. John Davis: 3100. Clara Davits: 3515*." The subscriber must then dial the extension number to address the message.

Single Key - Select this option to provide subscribers using the directory, when forwarding or creating a message, with single-digit choices to reach other subscribers. If this option is selected, the Call Server reads back directory entries in a form similar to the following example: "*For Leslie Davidson, press 1. For John Davis, press two. For Clara Davits, press 3*." The subscriber dials a single digit to address the message.

Shared Extension

Announcement - Click **Browse** to select the existing Announcement mailbox the Call Server should play before giving the caller choices when an extension is shared between multiple subscribers.

Dial By Name

Access Key - Select which digit subscribers dial to access the directory when addressing messages. This setting is used for the Original-Alternate and Centigram TUI.

Use Star Suffix - This setting places a "*" suffix after the directory is accessed.

Mailbox Default Name Formatting

Display Name Format - Click the drop-down box to select the mailbox display-name format you want to use. If you select Custom, use the format phrase box to create the type of display name format you want to use. This setting is used to format the display names of mailboxes. The mailbox display name is viewed from System Administration and other administration clients.

IMPORTANT Changing the default name formatting does not change the display name format of existing mailboxes. It affects the display name format of new mailboxes or existing mailboxes that have subsequent name changes.

Format Phrase - Use the Format phrase box to customize the format of the display name. A percent symbol (%) must enclose the letter signifying (L)ast , (M)iddle, (F)irst. Parentheses must enclose a non-alpha character such as a comma (,). For example, for a Display Name of Last, First Middle names the format phrase is entered as, %L%(,)%F%M%.

Formatting Example

First Name - The First name as displayed.

Middle Name - The Middle name as displayed.

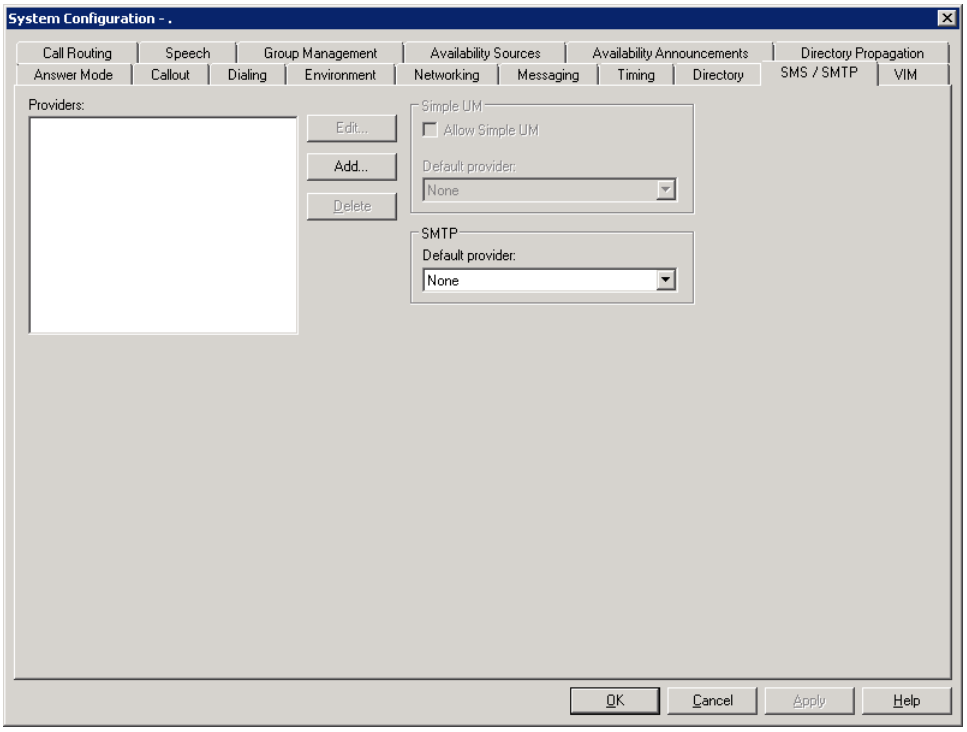
Last Name - The Last name as displayed.

Example - An example of the displayed name as configured is provided in the Format Phrase box.

SMS/SMTP Tab

The SMS/SMTP tab allows you to enable, add, and configure SMS (Short Message Service) or SMTP (Simple Message Transport Protocol) service providers on a system-wide basis. You can also edit or delete existing SMS/SMTP configurations. SMS and Simple UM (Unified Messaging) is allowed on an individual subscriber basis from the SMS/SMTP tab of the Subscriber mailbox.

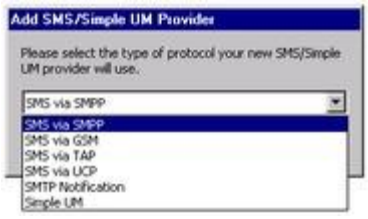
IMPORTANT You need specific information from the SMS provider to configure SMS.



Providers - Displays all SMS and SMTP providers that have been added to the system.

Edit button - Highlight the provider you want to edit, and then click **Edit** to edit the configuration. The SMS Provider dialog box displays to display the current configuration.

Add button - Click **Add** to display the SMS Provider dialog box, and then select a Short Message Service (SMS) protocol. Once you select a protocol, the related configuration dialog box displays to configure the settings required to communicate with the provider.



- SMS via SMPP
- SMS via GSM
- SMS via TAP
- SMS via UCP

- SMTP notification
- Simple UM

  The dialog box to configure the settings for the specific protocol selected displays.

  See the topic on the "SMS Provider dialog box" for detailed information on each provider type.

  Delete button - Highlight the provider you want to delete, and then click **Delete**. A warning text box displays if this provider is assigned to Subscriber mailboxes in the system.

  You must remove or change the provider on the SMS tab of each mailbox before you can delete the provider. Click **Yes** to set the SMS provider to None in each Subscriber mailbox configured for this SMS provider, or click **No** to cancel the delete action.

Simple UM

Allow Simple UM - Select to allow Simple UM for subscribers.

Default Provider - Select the default Simple UM provider from the list of Simple UM providers. You must create a provider before you can use it as the default provider. The default provider becomes the default provider on the E-mail tab of Subscriber mailboxes.

SMTP

Default Provider - Select the default SMTP provider from the list of SMTP Notification or Simple UM providers. You must create an SMTP provider before you can use it as the default SMTP provider. The default SMTP provider is used to send system messages to subscribers. For example, when subscribers request a security code reset through the Web PhoneManager application.

Speech tab

The Speech tab allows you to create and manage Speech commands for call processor actions and commands for Groups. For more information on administering speech functionality, please refer to the document entitled *Automatic Speech Recognition*.

Group Management tab

The Group Management tab allows you to create and manage Group Types and Groups. Group Management is a feature that enables administrators to assign subscribers to individual groups. These group identities are used to disambiguate, and then locate individuals through specific directory searches such as location, department, floor, or any other sub-group pertaining to the organization. Subscribers assigned to multiple groups are located through any directory in which they belong. For more information on the Group Management Tab, please refer to the document entitled *Automatic Speech Recognition.*

Working with UM8700 Mailboxes

On a typical UM8700 system the Call Processor mailboxes in conjunction with the Answer Mode determines how the Call Server handles incoming calls and message taking. This chapter introduces the other available types of UM8700 mailboxes that add both flexibility and features to your messaging application, and explains how to perform tasks common to all of them.

NOTE The information presented here is intended to coordinate with other topics in the UM8700 online help system as well as the worksheets in the online book Application Design Worksheets. NEC recommends that you have all of these resources at your disposal while you are designing a UM8700 messaging application.

Mailbox Types

Each mailbox type on a UM8700 system serves a specific function. The following table provides a brief description for each type of mailbox.

NOTE Not all of the types of mailboxes in this table handle incoming calls. Some, such as the Outbound mailbox for example, are designed specifically to handle messages or outbound calls.

Mailbox type	Function
AMIS networking	Accepts network messages to be sent to an AMIS compatible voice messaging system
Announcement	Plays a pre-recorded announcement to provide information to callers and as part of an Interactive mailbox it asks questions as part of an interactive questionnaire, or identifies an extension shared among several subscriber mailboxes
Availability COS	Specifies the default Availability settings for a group of mailboxes as well as shared Availability Automatic Override management. Provides the administrator with the ability to easily manage the Availability for groups of mailboxes. A subscriber must be associated with an Availability COS in order to use the Personal Assistant - Availability features.
Call Processor	Plays a greeting, typically to present a list of options and initiates an action based on the caller's input, either through DTMF or Speech commands, depending upon the application.

Digital Networking	Accepts network messages sent to another UM8700 or VPIM compliant voice messaging system over a TCP/IP network as specially formatted ESMTP e-mail messages. It also uses the network to exchange mailbox and server configuration information with other UM8700 systems
Distribution List	Sends one message simultaneously to a group of mailboxes
Fax Center	Routes fax messages to Subscriber mailboxes through the Fax server, typically from an auto attendant application. Used for backward compatibility to supports sites that upgrade from earlier versions of UM8700, but is not required for new applications.
Fax Delivery	Delivers fax messages to a fax machine or modem on demand from a subscriber
Interactive	Collects information from the caller by playing a sequence of Announcement mailboxes, and then waits for the caller's responses after each announcement. Responses are sent to the sponsoring Subscriber or Distribution List mailbox as a message.
Local Alias	Provides a local presence for a subscriber on a remote System Server
Mailbox COS	Specifies default mailbox settings for a group of Subscriber mailboxes. Provides the administrator with the ability to easily manage groups of Subscriber mailboxes and can be used as a template when creating or importing Subscriber mailboxes
Message Center	Used to create unique message taking applications and supports sites that upgrade from earlier versions of UM8700, but is not required for most applications
Network	Accepts analog network messages for subscribers on other UM8700 servers and sends those messages at scheduled times over analog telephone connections
Outbound	Delivers voice messages to telephone numbers that are not part of the UM8700 system
Subscriber	Receives messages on behalf of a single subscriber and provides unified communication support for that

	subscriber.
Visitor	Enables a visitor to the company to exchange messages with a sponsoring subscriber

Common Mailbox Management Tasks

The procedures in the related sections explain how to perform the following basic management tasks, which apply equally to mailboxes of all types:

- Using mailbox editing shortcuts
- Creating mailboxes
- Copying mailboxes
- Deleting mailboxes
- Editing and viewing mailbox settings
- Renumbering mailboxes
- Template editing groups or ranges of mailboxes

IMPORTANT To perform any of these tasks, you must log on to the System Server with a user ID that has the appropriate administrative access rights. If you are not sure whether your user ID has such rights, or if you find that you are blocked from completing a procedure, consult the other administrators of your UM8700 system.

Using Mailbox Editing Shortcuts

The following procedures are designed to lead you through a task as explicitly as possible. To remain as easy to follow as possible, however, the procedures omit the shortcuts that UM8700 Admin provides. For your reference, the following table lists the shortcuts that relate to mailbox management.

If you want to ...	*Then, from the Mailbox menu, select ...*	*Or click this button on the toolbar ...*	*Or...*	*Or...*
Add a mailbox	**Add**		Press the INSERT key	Right-click any mailbox, and then select **Add**.
Copy a mailbox	**Copy**			
Delete a mailbox	**Delete**		Click the mailbox, and then press the DELETE key	Right-click the mailbox, and then select **Delete**.
Edit the settings	**Edit**		Click the	Right-click the

If you want to ...	*Then, from the Mailbox menu, select ...*	*Or click this button on the toolbar ...*	*Or...*	*Or...*
in a mailbox			mailbox, and then press the RETURN key	mailbox, and then select **Edit**, or double-click the mailbox.
Renumber a mailbox	**Renumber**			
Template edit a group of mailboxes	**Template**			
View the settings in a mailbox	**View**			Right-click the mailbox, and then select **View**

Creating a Mailbox

You create a mailbox by assigning it a unique number and configuring the parameters and fields of the mailbox. NEC recommends that you follow the numbering scheme for the site. You can review the numbering scheme by looking at the mailbox list pane in the main UM8700 Admin window. A typical numbering scheme categorizes mailboxes by the leading digit of the mailbox. For example, Subscriber mailboxes match their extension numbers, 3001-3999, Call Processor mailboxes are numbered 0000-0999, Distribution List mailboxes are numbered 4001-4999, and so on.

UM8700 Admin lets you create mailboxes from the System Server or a client workstation. The utility also lets you create mailboxes individually or across a range of mailboxes for a specific type.

TIP Save time by copying an existing mailbox.

To create a mailbox...

1. Start UM8700 Admin.
2. From the menu bar select **Mailbox**, and then select **Add**.
3. From the Server list box, select the name of the System Server on which you want to create the new mailbox.
4. From the Mailbox Type list box, select the type of mailbox you want to create.
5. From the Class Assignment list, select a Mailbox COS if necessary (Subscriber mailboxes only).
6. From the Template list, select a default (Availability COS mailboxes only).

7. Click **OK** to open the new mailbox for editing.

> **IMPORTANT** In the next step, be sure to follow the naming convention that your company has chosen. If the mailbox is a Subscriber mailbox for example, be sure to use the same naming convention used for the other Subscriber mailboxes. If you do not, callers may not be able to locate the subscriber to whom the new mailbox belongs.

8. In the **Name** or **Display Name** box, type the name under which the System Server lists the mailbox.
9. Configure or change other settings within the mailbox as necessary, and then click **OK** to save the new mailbox.

When you create a mailbox, not all settings need to be configured; some have default values (information that is preset).

Copying a Mailbox

The following procedures explain how to create copies of an existing mailbox. The first procedure explains how to create individual copies, while the second explains how to create copies of one mailbox to all available numbers in the range that you specify.

The copies of a mailbox retain all of the settings in the original mailbox except for the following:

- Mailbox Number
- Name
- Security Code
- Telephone device numbers
- Mailboxes specified on any tab other than the Main tab of a Subscriber mailbox
- Greetings and name recordings
- Sponsorships and Distribution List memberships

Using the retained information when you configure the copied mailboxes helps you save time and maintain accuracy.

To copy a mailbox...

1. Start UM8700 Admin.
2. In the Server pane of UM8700 Admin, select the System Server where the mailbox you want to copy resides.
3. In the Mailbox Type pane of UM8700 Admin, select the type of mailbox you want to copy.
4. In the mailbox pane of UM8700 Admin, select the specific mailbox you want to copy.
5. From the menu bar, select **Mailbox**, and then **Copy**.

> **IMPORTANT** In the next step, be sure that the number you plan to give the copied mailbox is not needed for any other purpose.

6. In the Mailbox Number box, type the number that you want to assign to the copied mailbox.

IMPORTANT In the next step, be sure to follow the naming convention that your company has chosen. If the mailbox is a Subscriber mailbox for example, be sure to use the same naming convention used for the other Subscriber mailboxes. If you do not, callers using either of the directories may not be able to find the subscriber associated with the new mailbox.

7. In the Name fields, type the name under which the new mailbox should appear in reports and directory listings.
8. Configure or change other settings within the mailbox as necessary, and then click **OK** to save the new mailbox.

To copy one mailbox to a range of new mailboxes...

1. In the Server pane of UM8700 Admin, select the System Server where the mailbox you want to copy resides.
2. In the Mailbox Type pane of UM8700 Admin, select the type of mailbox you want to copy.
3. In the mailbox pane of UM8700 Admin, select the specific mailbox you want to copy.
4. From the menu bar, select **Mailbox** | **Range**, and then select **Copy**.
5. From the Server list box within the Mailbox Range Copy dialog box, select the System Server on which you want to create the new copies.
6. In the From and To boxes, type the mailbox numbers of the first and last copies you want to create.

IMPORTANT At the end of this procedure, the System Server creates new mailboxes at all unoccupied numbers in the range you specified in this step. This action does not replace or change any mailboxes that already exist.

7. To copy the mailboxes, click **OK**.
8. Click **OK** when the mailbox copy action is complete.

You can now open each mailbox individually and configure or change its settings as necessary.

Deleting a Mailbox

The following two procedures explain how to delete mailboxes individually, in small groups, or across continuous ranges of mailbox numbers.

WARNING When a mailbox is deleted, all recordings, messages, and other information associated with that mailbox are deleted permanently as well.

To delete a mailbox...

1. Start UM8700 Admin.
2. In the Server pane of UM8700 Admin, select the System Server where the mailbox you want to delete resides.
3. In the Mailbox Type pane of UM8700 Admin, select the type of mailbox you want to delete.
4. In the mailbox pane of UM8700 Admin, select the specific mailbox you want to delete.

NOTE To delete a group of specific mailboxes, hold down the CTRL key while selecting each of the mailboxes.

5. From the Mailbox menu, select **Delete**.
6. To confirm the deletion, click **Yes**.

Editing and Viewing Mailbox Settings

If you only need to check the settings within a certain mailbox, you can do so by opening the mailbox for editing. However, while the mailbox is open, you run the risk of accidentally changing one of its settings. Within UM8700 Admin, you can open the mailbox for viewing only.

The following procedures explain how to perform the following tasks:

- Opening individual mailboxes for editing
- Opening individual mailboxes for viewing
- Opening all mailboxes of a specified type and within a specified range for editing

To edit and view mailboxes...

1. Start UM8700 Admin.
2. In the Server pane of UM8700 Admin, select the System Server where the mailbox you want to view or edit resides.
3. In the Mailbox Type pane of UM8700 Admin, select the type of mailbox you want to view or edit.
4. In the Mailbox pane of UM8700 Admin, select the specific mailbox you want to view or edit.

NOTE To view or edit a group of specific mailboxes, press and hold down the CTRL key while selecting each mailbox.

5. From the menu bar select **Mailbox**, and then select the command that gives you the appropriate access to the mailbox.

If you ...	*Then ...*
Want to change the settings in the mailbox	Select **Edit**.
Do not want to change the settings in the mailbox	Select **View**.

6. When you are finished examining or editing the settings in the mailbox, click **OK**.

NOTE If you selected more than one mailbox in step 3, you need to repeat step 5 for the other mailboxes that you selected. The mailboxes open one at a time until you have viewed or edited them all.

Renumbering Mailboxes

Under most circumstances, you should not change the number of a mailbox after you have created it. When you open a mailbox for editing, UM8700 Admin enforces this principle by

preventing you from editing the number. However, there is a separate command for renumbering mailboxes if the need arises.

NOTE Changing the number of a Subscriber mailbox has no effect on the device numbers to which that mailbox refers.

To change the number of a mailbox...

1. Start UM8700 Admin.
2. In the Server pane of UM8700 Admin, select the System Server where the mailboxes you want to renumber reside.
3. In the Mailbox Type pane, select the type of mailbox you want to renumber.
4. In the Mailbox pane, select one or more mailboxes that you want to renumber.
5. From the menu bar select **Mailbox**, and then select **Renumber**.
6. In the New box within the Mailbox Renumber dialog box, type the new number that you want to assign.
7. If you want to make other changes to the mailbox after changing its number, select the **Edit after renumber** box.
8. To assign the new number, click **OK**.
9. If you are prompted that a mailbox with the new number already exists, click **OK**, and then repeat steps 5 through 7 with a different number.
10. If the mailbox displays for editing, make whatever changes are appropriate. When you are finished, click **OK**.
11. Repeat steps 5 through 9 for the remaining selected mailboxes.

Editing Mailboxes with Template Edit

Template editing allows you to make changes to one mailbox and apply that change to multiple other mailboxes.

NOTE Template editing can be used to edit common fields in Call Processor and Subscriber mailboxes only. Settings that are unique to individual mailboxes cannot be edited with the template edit tool.

The following procedure explains the steps to template edit mailboxes individually or in small groups. If you have more than a few mailboxes to update that occupy a continuous range of addresses, use the range template-edit procedure to perform these tasks.

WARNING Template editing overwrites the settings in all selected mailboxes without confirming the changes to each specific mailbox.

To template edit one or more individual mailboxes...

1. Start UM8700 Admin.
2. In the Server pane of UM8700 Admin, select the System Server that contains the mailboxes you want to edit.
3. In the Mailbox Type pane of UM8700 Admin, select the type of mailbox you want to edit.

4. In the mailbox pane of UM8700 Admin, select all of the mailboxes you want to edit. This group of mailboxes can, but does not have to include the template mailbox.
5. From the menu bar select **Mailbox**, and then select **Template**.

> **IMPORTANT** If you want to use a mailbox on a different System Server as the template, use the Server list box within the Mailbox Multiple Selection Template Edit dialog box to select the server on which that mailbox is found.

6. In the Mailbox Multiple Selection Template Edit dialog box, click the browse button.
7. Select the template mailbox, and then click **OK**.
8. To begin editing mailboxes, click **OK**.
9. In the template mailbox, make any appropriate changes.
10. To apply the changes to the template mailbox and all of the other mailboxes you selected, click **OK**.

> **WARNING** Template editing overwrites the settings in all selected mailboxes without confirming the changes to each specific mailbox.

To template edit a range of mailboxes...

1. From the menu bar, select **Mailbox** | **Range**, and then click **Template...**.
2. From the Server list box within the Mailbox Template Edit Range dialog box, select the System Server that contains the mailboxes you want to edit.
3. In the From and To boxes, type the numbers of the first and last mailboxes you want to change.

> **NOTE** The template mailbox does not need to be within the range of mailboxes between the two numbers you are editing.

4. Click **Browse** to select the template mailbox, and then click **OK**.
5. To begin editing mailboxes, click **OK** again within the Mailbox Template Edit Range dialog box.
6. When UM8700 Admin advises you of how many mailboxes the template editing process has updated, click **OK**.

Creating Recordings

In a typical system, each UM8700 mailbox has at least one recording associated with it: the name recording. Additionally, a greeting or announcement can be recorded for the following mailboxes:

- Announcement
- Call Processor
- Subscriber

You can also record a system-wide greeting (Announcement mailbox) that plays before the subscriber's personal greetings. The following guidelines and procedures discuss how to make and assign these greetings.

NOTE This chapter does not discuss how to create greetings for a Subscriber mailbox. Subscribers are typically responsible for managing their own greetings.

Guidelines for Writing Recording Scripts

Callers accept and use your call routing and messaging system only if they accept the information it provides. You can make sure this information is as useful, consistent, and credible as possible by planning your mailbox recordings before you start recording. As you plan your recordings, keep the following in mind:

- Prepare a written script containing all of the announcements, greetings, and names to record. Type and double-space the script so that it is easy to read. If possible, select a font that is as clear and legible as possible.
- In the initial greetings that callers hear, make it clear that a machine has answered the telephone. Never start an automated greeting with the word "Hello." Phrasing the initial response as though an actual person were answering might trick callers into speaking over part of a menu, which can be frustrating. Instead, communicate the situation clearly with an announcement like the following: "*Thank you for calling (company name). An operator will be with you in a moment*."
- Phrase your menu options carefully, presenting each option before you mention the key that callers need to press. This type of phrasing gives callers advance warning that they should press the key; for example, "To reach the sales department, press 2."
- Remember that greetings and announcements are heard, not read. Announcements that look fine on paper may not work in a voice menu. Try reading your scripts aloud to get an idea of how they sound and how easy they are to recite.

Guidelines for Recording

Follow the guidelines listed below to make recordings.

- Record in a noise-free environment
- Hold the telephone mouthpiece three to five inches (eight to twelve centimeters) from your mouth
- Do not move the telephone or cord while speaking
- Speak in a normal speaking voice

- To begin recording, take a breath, press the appropriate key to start the recording, and begin speaking after you hear the tone.

Review the recordings, listening for consistency, background noise, pauses too long between speech, anything that detracts from the information being delivered. You may also want to recruit a small group of users to listen to the recordings for you, to make sure that they convey the information you want your callers to hear. Re-record them if necessary.

Recording Mailbox Names

It is important that every mailbox have a recorded name. Subscribers usually record their own names and the names of any mailboxes they sponsor (Visitor, Announcement, Call Processor, and Distribution List mailboxes). The system administrator records the names for all other mailboxes (such as answer mode Call Processors, Announcement, and department Distribution Lists).

There are several reasons why it is important to record mailbox names:

- It helps callers know that they have reached the correct person or department.
- It helps subscribers identify the source of incoming messages.
- It is required for the mailbox to be announced in the subscriber and automated attendant directories.

Suppose, for example, you create mailbox number 451 as a Distribution List for the Marketing Department. If a caller leaves a message in that mailbox before you have recorded a mailbox name for it, UM8700 plays the following prompt before it directs the caller to start recording:

"*This message will be sent to 451*."

After you record a name, such as "the Marketing Distribution List," the prompt changes to reflect the newly recorded mailbox name:

"*This message will be sent to the Marketing distribution list.*"

IMPORTANT An administrator must have the system access option "Record Mailbox Names" enabled on the Recording tab of the administrator's Subscriber mailbox to record mailbox names.

To record a mailbox name...

1. Call into UM8700, and then log on to your Subscriber mailbox.
2. Press the appropriate key to reach the system administrator function menu.

If your Subscriber mailbox is set to use...	*Then press...*
The standard TUI	**4**
The Emulation for the Centigram TUI	**4**
The Emulation for the Octel Aria TUI	**6**
The Emulation for the Octel Serenade/VMX TUI	**1, 1**

NOTE The UM8700 Emulation for the Nortel Meridian Mail® TUI and the Avaya Intuity AUDIX® TUI do not provide access to the system administrator menu. To verify your TUI setting, check the Presentation tab of your own Subscriber mailbox in UM8700 Admin.

3. Press **2** to record a mailbox name.
4. Enter the mailbox number to which you want to record a name.
5. Press **2** to start recording. When you have finished recording, press **2** again.
6. Press **5** to save the recording.

Recording Two-Part Mailbox Greetings and Announcements

You can record two-part greetings and announcements for Call Processor mailboxes. A Call Processor mailbox must exist before you can create a recording for it.

The system administrator is responsible for recording announcement messages for all Call Processor mailboxes not sponsored by subscribers. The information you give in an announcement message depends on the audience for whom the message is intended.

IMPORTANT An administrator must have the system access option "Record Announcements" enabled on the Recording tab of the administrator's Subscriber mailbox in order to record announcements.

To record a greeting or an announcement...

1. Call into UM8700, and then log on to your Subscriber mailbox.
2. Press **4** to access the system administrator functions.
3. Press **5** to record an announcement message.
4. Enter the mailbox number for which you want to record an announcement. The system plays the current recorded announcement or, if nothing is recorded, plays "Nothing is currently recorded." If you are prompted with "*press 1 for the introductory greeting or 2 for the instructional greeting*," the Call Processor you are recording for is set up for two-part greetings.

If you want to...	*Then press...*
Record the introductory greeting	**1**
Record the instructional greeting (menu)	**2**

5. Press **2** to start recording. When you have finished recording, press **2** again.
6. Press **5** to save the recording.

The following system administrator options are available when recording announcements:

If you want to...	*Then...*
Record a new announcement	Press **2**
Re-record over the existing announcement	Press **2**
Discard the existing announcement	Press **4**
Review the announcement directly after recording	Press **6**

Cancel and leave the previous recording unchanged	Press *

Recording Announcements in Multiple Languages

The System Server stores a separate set of mailbox recordings for each installed and selected set of prompts. This allows the server's mailboxes to support multiple languages. When a caller selects an option that changes the language used for voice prompts, the server can provide greetings and announcements to match.

If more than one prompt set is installed on the Call Server, make recordings to support each prompt set by changing the language selection between sets of recordings. You can change languages in one of the following ways.

To change your active language through UM8700 Admin...

1. Open your own Subscriber mailbox and click the Presentation tab.
2. From the Language list box in the Prompt option group, select the new language.

To change your active language over the telephone...

1. Dial in to the system and log on to your Subscriber mailbox.
2. At the main menu, enter the appropriate string of digits.

If your subscriber mailbox is set to use …	*Then press …*
The standard TUI	**3**, **1**, **7**, and **1**
The Emulation for the Centigram TUI	**8**, **1**, **7**, and **1**
The Emulation for the Octel Aria TUI	**4**, **1**, **7**, and **1**
The Emulation for the Octel Serenade/VMX TUI	**1**, **6**, **1**, **7**, and **1**

NOTE The UM8700 Emulation for the Nortel Meridian Mail® TUI and the Avaya Intuity AUDIX® TUI do not provide access to the system administrator's menu. To verify your TUI setting, check the Presentation tab of your own Subscriber mailbox in UM8700 Admin.

3. If the new language is not the one you want to use, press the 7 and 1 keys to switch to the next available language. Repeat this step until you have reached the language you want to use.
4. To return to the main menu, press the * key twice.

Recording a Logon Message

The default logon message is the system prompt subscribers hear when they log on to their mailbox. For example, when a subscriber executes an Access Messages action type from a Call Processor mailbox in the automated attendant the logon message plays, "*please enter your mailbox number*." You can record a logon message to replace the default system prompt. When you record a logon message, the system prompt is replaced by the new logon message. The system prompt is not deleted, it is overridden. If you delete the logon message you created, the default system prompt plays again.

The logon message you record is an announcement, not a message. The Call Server plays the logon message immediately after a subscriber executes the Access Msgs action type enters his mailbox number. It is heard by any caller who executes an "Access Msgs" action.

IMPORTANT To record a logon message, the system administrator mailbox must have Record System Broadcast Msgs enabled in the System Access group on the Recordings tab of the Subscriber mailbox.

To enable the recording privilege for the logon message, open a Subscriber mailbox and click the Recordings tab. In the System Access group, select the Record System Broadcast Msgs checkbox, and then click **OK**.

To record the system logon message...

1. Call into the system, and then log onto a mailbox that has administrative privileges.

   NOTE The default Subscriber mailbox (9999) "Audio Administrator" has administrative recording privileges enabled.

2. Press **4** to access the system administrator functions.
3. Press **4** to record a logon message. If you have a logon message recorded, the Call Server plays it to you for review.
4. Choose one of the following options:

If you want to...	Then...
Record the a new logon message	Press **2**
Re-record over the existing system logon message	Press **2**
Discard the existing system logon message	Press **4**
Review the logon message directly after recording	Press **6**
Cancel and leave the previous recording unchanged	Press *****

5. Once you are satisfied with the recording, press **5** to save it.

Recording a System Broadcast Message

A system broadcast message notifies all subscribers of system changes or alerts subscribers of special situations such as the need to shut down the Telephony Server for system maintenance.

The system broadcast message is an announcement, not a message. The Call Server plays the broadcast message immediately after a subscriber enters his mailbox number and security code. It is heard only by subscribers and is played before any other prompt. Visitors and callers who access a Visitor mailbox do not hear the system broadcast.

Remember to delete the system broadcast message when the information is obsolete or when all or most subscribers have heard it. In most cases, you can delete the system broadcast after a few days if most subscribers access their mailboxes daily. During holiday and vacation periods, you might want to leave it longer. Subscribers cannot delete the system broadcast message. Subscribers can skip the message by pressing the # key; you might want to remind subscribers of this feature when you record the broadcast. The following introduction works well:

"If you have heard this message and want to skip it, press the pound sign key."

IMPORTANT To record a system broadcast message, the system administrator mailbox must have Record System Broadcast Msgs enabled in the System Access group on the Recordings tab of the Subscriber mailbox.

To enable the recording privilege for the logon message, open a Subscriber mailbox and click the Recordings tab. In the System Access group, select the Record System Broadcast Msgs checkbox, and then click **OK**.

To record a system broadcast message...

1. Call into the system, and then log onto a mailbox that has administrative privileges.
2. Press **4** to access the system administrator functions.
3. Press **1** to record a system broadcast message. If you have a broadcast recorded, the Call Server plays it.
4. Choose one of the following options:

If you want to...	Then...
Record the a new system broadcast message	Press **2**
Re-record over the existing system broadcast message	Press **2**
Discard the existing system broadcast message	Press **4**
Review the broadcast message directly after recording	Press **6**
Cancel and leave the previous recording unchanged	Press *****

5. Once you are satisfied with the recording, press **5** to save it.

Importing Audio Recordings into a Mailbox

If your company has a professional sound studio and voice talent available and wants to produce a complete set of audio recordings for its mailboxes, you can use UM8700 Admin to import those recordings. This section discusses what the studio needs to know before they finish producing the recordings and how the import process works.

Working with the Studio

Before you import an audio recording into a mailbox, you must make sure that its audio format is correct. The simplest way of doing this is to find out what format the System Server is using and ask the studio technician to deliver the recordings in that format.

The UM8700 software supports five different audio formats, but it also requires that a standard format be set for the server at installation time. You can look up the name of this format by viewing the setting on the Database dialog box of the Main tab in UM8700 Configuration of the System Server platform.

If the server uses …	*Then ask the studio technician to return the recordings as …*
PCM (G.711 µ-law)	Monaural Microsoft WAV files in CCITT µ-law format, at a sampling rate of 8000 Hz
PCM (G.711 A-law)	Monaural Microsoft WAV files in CCITT A-law format, at a sampling rate of 8000 Hz

NOTE You can also import .wav files in the following format: PCM (8 bits per sample, linear, no compression of any kind, and 8,000 samples per second). For more information, contact Technical Support.

NOTE The Greek letter µ in “µ-law” is also spelled as mu. In either case, if you have to discuss it with the studio technician by telephone, you can pronounce it as either mew or moo.

NOTE The µ-law format is used normally in North America and Japan, while A-law is used in most other parts of the world.

Importing Recording Files

Once you have received the files from the studio and performed any additional editing, you can import them into any of the mailboxes, except for Mailbox COS.

NOTE Regardless of how many languages are on the system, you can import only one spoken name recording for a mailbox. This name recording plays regardless of which language is selected.

To import audio files into a Subscriber mailbox...

1. Open a Subscriber mailbox for editing.
2. Click the **Recordings** tab.

3. In the Subscriber Recordings list, select the appropriate name or greeting in the language you want to import, and then click **Import**. The Select Recording File to Import dialog box displays.
4. Navigate to the file you want to import, select the file, and then click **Open**.
5. Repeat steps 3 and 4 for any remaining files you want to import into this mailbox.
6. In the mailbox, click **OK** to save your changes.

To import audio files into all other mailbox types...

1. Open a mailbox for editing.
2. Press **ALT+R**.
3. In the Recordings dialog box, select the appropriate name or greeting in the language you want to import, and then click **Import**. The Select Recording File to Import dialog box displays.
4. Navigate to the file you want to import, select the file, and then click **Open**.
5. Repeat steps 3 and 4 for any remaining files you want to import into this mailbox.
6. In the Recordings dialog box, click **OK** to return to the mailbox.
7. In the mailbox, click **OK** to save your changes.

Working With Call Processor Mailboxes

The Call Processor mailbox is used to create applications in UM8700. It is generally the starting point for all outside and non-integrated calls, the foundation of the automated attendant. The most obvious task a Call Processor mailbox performs is to interpret strings of dialed digits or speech commands and handle calls accordingly, but other settings in each Call Processor and interactions between Call Processors can also affect the way the messaging application works. Call Processor mailboxes are used throughout UM8700 to provide automated attendant functions, custom applications, departmental menus, or extension specific processing (ESP) for Subscriber mailboxes.

For more further information on call processor mailboxes, please refer to the document entited *Call Processor Mailbox*.

Questions to Consider

When you create or change a Call Processor mailbox, be aware of how the following questions should be answered for the site where the Call Server is installed:

- *What happens when a call times out?* That is, in the absence of any response from the caller, how much silence should the Call Processor allow between the time it finishes presenting its options and the time it takes its next automated action, and what should that action be? Using the Timeout box and the **TO** key action, you can set the Call Processor to respond as appropriate.

  NOTE Keep in mind that the Call Server may occasionally field calls from old rotary or pulse-dialing telephones. The timeout settings in the server's Call Processors should take this possibility into account, as should their greetings. (An example greeting might start "*Thank you for calling. Our operator will be with you in a moment. For ...*".)

- *What happens when control of a call returns to a Call Processor?* In a variety of cases, a Call Processor can invoke an action or a mailbox on a call, and then receive the call back once the action completes itself or the caller logs out of the mailbox. Normally, the Call Processor runs again as it had previously, repeating until it times out. However, using the Next Call Processor options, you can set the Call Processor to pass control of the call to the Next Call Processor in a sequence or back to the Call Processor mailbox configured in the Answer Mode.
- *What are the standards of application design at your company?* If most of the Call Processors have the same options, the key used for those options should be the same everywhere. For example, if a caller presses 1 to reach the automated attendant directory in the main menu Call Processors, the automated attendant directory should be tied to the 1 key in all of the other Call Processors as well.

  NOTE In the main menus, it is typically a good idea to assign one key, such as the # key, or speech command, such as User Login, to the Access Msgs action. This gives subscribers a quick and easy way of logging on to their mailboxes from outside telephones. Be sure to check with the administrator of your telephone system to make sure that the key you assign is not reserved by the system, or is the first digit in any valid extension number.

- *Do your subscribers already rely on any specific keystrokes or dialing sequences?* If you are installing a UM8700 server to replace an older voice mail system, you may want to assign the same keystrokes that the old system used for common actions, such as logging on to a mailbox or transferring to an extension. For example, if you are using the UM8700 Emulation for the Avaya Intuity AUDIX TUI, you might want to configure the Call Processors to transfer an incoming call when the caller enters *8, and to allow the caller to log on to a mailbox after entering *7.
- *What kind of greeting is appropriate for this Call Processor?* If callers pass through this Call Processor two or more times in a single call, as they do through the server's main menus, a two-part greeting is appropriate since it allows the Call Processor to repeat only the menu items on return visits. On the other hand, if callers are likely to pass through the Call Processor only once per call, a single greeting may work better. In addition, two-part greetings work only in Call Processors designated in the Answer Mode.
- *How long should voice messages taken through this Call Processor be?* The Max Msg Length (sec) feature controls the length of messages taken through key actions such as Subscriber Msg and Record, and it may affect some messages that callers leave after this Call Processor passes them to a Subscriber mailbox. Reducing the value of this setting can reduce the amount of disk space that voice messages take up on the System Server platform, but you also risk inconveniencing callers. Proceed with caution.
- Does this Call Server support AMIS networking? If this Call Processor can accept calls directly through the answer mode table, the C key action must be set aside for use in receiving Audio Messaging Interchange Specification (AMIS) voice messages for the subscribers in the system. (For more information about setting up AMIS voice networking, see the online book *Analog Networking*.)

For More Information

Because of the central role that Call Processor mailboxes play in a messaging application, instructions on configuring them are found in many of the documents and online books published to support the UM8700 software. For example, the online book, *Call Processor Mailboxes* discusses all of the Action types, Arguments, Keys, and parameters of the Call Processor mailbox, the online book *Fax Messaging* discusses how to set up Call Processors to handle fax messages, and the online book Analog Networking discusses how to configure Call Processors to support AMIS networking.

The UM8700 online help system also provides extensive information about all fields and controls in a Call Processor mailbox as well as procedures on building a messaging application, descriptions of the various key actions available, and a full list of input template characters and their purposes.

Using Speech Commands

You can initiate Call Processor action types using speech commands and create an entire automated attendant application using only speech commands. It is recommended that you create both a speech and DTMF driven automated attendant so callers have the option to use either the VUI or the TUI to navigate within the system. You can add speech commands to the system from either the Call Processor mailbox or the Speech tab of UM8700 Admin. If multiple ASR languages are installed you will see a tab at the bottom of the form for each language when the view is set to include speech. You may select any of the tabs to immediately see which commands are missing for that particular language

IMPORTANT You must have a licensed speech resource available to use a speech command in the automated attendant.

Call Processor Mailbox Speech Recognition Directory

Speech directories use the First Name, Last Name, and Speech Alias name fields of the Subscriber mailbox to locate subscribers. The speech directory uses the Name and Speech Alias name fields to locate Distribution List and Network mailboxes. The subscriber name or mailbox name is the speech command for the directory function. Provide instructions to callers answered by the automated attendant to speak the name of the person they are calling. The directory function of ASR listens for the name of the requested subscriber and searches for the best matches among all the names and alias names. When a match is found, the recorded name in the Subscriber mailbox is played to confirm a correct match, and the call is transferred or a messaging session is initiated.

Departmental, location, and custom directories are created by assigning the subscriber to various group assignments in the Group Management tab of Configuration, or the main tab of the Subscriber mailbox. Custom directories are created to suit the requirements of the organization.

Automatic Speech Recognition has several default directories:

- **Directory: All** – Searches all subscribers within the organization.
- **Directory: Department - <Group Name>** – Searches all subscribers within the specified Group Name, in the group type Department. For example, Directory: Department - Sales. Sales is a group defined within the group type, Department. Particular subscribers are assigned to the group, Sales.
- **Directory: Location -<Location Name>**– Searches all subscribers within a given location. For example, Directory: Location – New York. New York is a group defined within the group type, Location. Subscribers are a subset of the group, New York.

  NOTE The group types, Department and Location are created by default in the standard database. You may delete these group types if desired, and then create custom group types, such as “Affiliations” or “Job Titles.”

Important Considerations for the Speech Recognition Directory

- Only one type of directory is permitted per action in a Call Processor mailbox. If the application requires multiple speech directories, such as a department, location, or all employees, the application must use separate actions within the Call Processor mailbox for each directory type.

NOTE Only one Directory: All action may be configured for a Call Processor mailbox. It is not possible to combine a Directory: All action with any other speech directory in the same Call Processor mailbox.

- A transfer action must be defined as the action type for the directory if callers are to be transferred. Use the transfer type suitable to the application.
- Do not use template characters or DTMF digits in the Arguments field. Leave it blank. The directory search matches the subscriber's "Speech Recognition Name" with the primary device of the associated mailbox for transfers.

Add "Call Processor" Speech Command dialog box

The Add Call Processor Speech Command dialog box allows you to add a command name, associated speech command, and alternate phrases to the system. You can add the command name, add, or edit an alternate phrase, TTS name, or spoken name command.

For more information, please refer to the *Automatic Speech Recognition Administration Guide*.

Creating an Automated Attendant Application

The Call Processor mailbox in conjunction with the Answer Mode table comprises the automated attendant. You must allow transfers in the Call Processor mailbox to a particular number or group of numbers and the Call Processor mailbox must be defined in the particular line group on which the call was received.

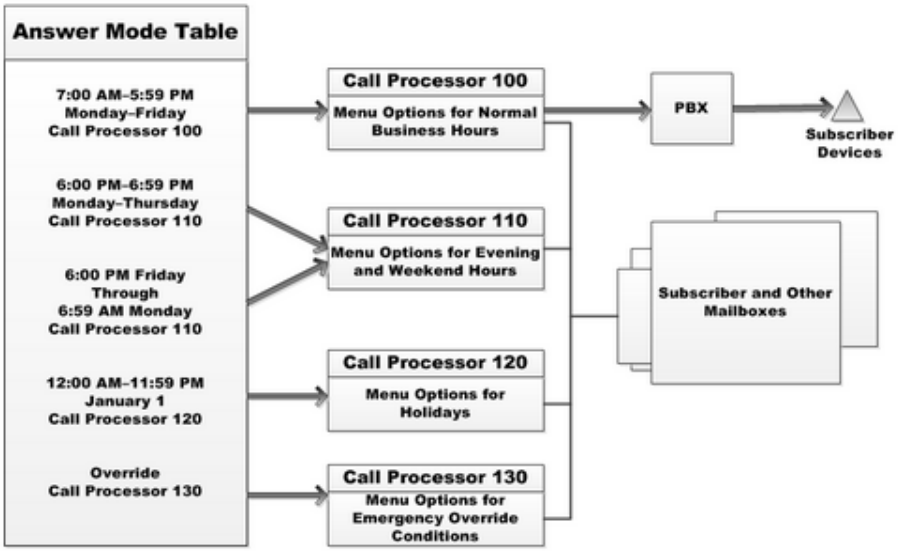
The simplest example of an automated attendant application, is one in which a Call Processor mailbox answers an incoming call, receives input from a caller, and then attempts to transfer the call to a subscriber's primary extension device. The subscriber answers the call or not; if the line is busy or unanswered the transfer attempt is aborted and the caller is passed to the Subscriber mailbox associated with the number the caller dialed.

The Answer Mode configuration defines which Call Processor mailbox is active for each Call Server, the Line Group, the Time of Day, and the Day of Week. The Answer Mode provides a scheduled routine, by which a defined Call Processor mailbox answers calls, plays a welcome greeting, and provides an audio menu based on the business hours of the organization.

All Call Processor mailboxes perform the same basic task; that is, they all receive control of a telephone call or message and respond to it as their internal settings dictate. To determine which mailbox should receive control of a call when it first arrives, the Call Server consults its answer mode table. This table contains two types of entries:

- Basic entries specify which mailbox initially answers and has control of the call based on the Call Server port taking the call, the time of day, and the day of week
- Override entries allow administrators to invoke special call handling conditions. Overrides are effective from the time they are enabled by an administrator and until the administrator disables it.

The following diagram shows how these elements fit together. In this example, a company uses four main menus (Call Processor mailboxes): one for normal business hours, one for non-business hours on weekdays, one for weekends, and one for a company holiday. In this example, Call Processor mailbox 130 is available for use when the weather is severe enough to close down the company.



Once the assigned answer mode (initial) Call Processor mailbox has control of a call, it can allow access to other mailboxes, based on the application. Application design and the settings in each mailbox affect what happens to the call after an action is initiated by the caller or the system, if no action is taken by the caller. In a typical automated attendant application the initial Call Processor mailbox allows a caller to transfer to a subscriber telephone or department, reach an operator, listen to an audio text message, leave a message, or log on to a Subscriber mailbox. If the caller completes an action and remains on the line the caller is returned to the initial Call Processor mailbox unless a "Next Call Processor" is defined in the initial Call Processor mailbox. If a Next Call Processor mailbox is defined, it takes control of the call. The caller may be offered a new set of options and instructions in this mailbox. If the caller now completes an action and remains on the line the caller is returned to the Next Call Processor mailbox.

IMPORTANT The preceding section serves only as a brief example of how a Call Processor mailbox handles calls. It does not provide a complete overview.

Getting Started with Subscriber and Mailbox Class of Service

The Subscriber mailbox is the primary point of contact between a UM8700 system and the subscribers of the telephone system to which the Call Server is connected. In a typical configuration, the telephone system forwards unanswered or busy incoming calls directly to the Call Server. The Subscriber mailbox can provide callers with several different options for communicating with the subscribers, including dialing an extension, speaking the subscriber's name, or leaving a message for a subscriber.

A Mailbox Class of Service (COS) is a pre-configured set of Subscriber mailbox configurations that are applied to any Subscriber mailbox. The settings found in a Mailbox COS are essentially the same as those found in a Subscriber mailbox. However, since some settings are unique to individual subscribers, they must be set within the individual Subscriber mailbox. You can use a Mailbox COS to create Subscriber mailboxes with the same settings or manage groups of Subscriber mailboxes within a particular class of service. You must first create and configure a Mailbox COS before Subscriber mailboxes can be assigned to it.

NOTE The terms caller and subscriber are used according to their traditional definitions in the discipline of telephony. In those definitions, a subscriber is a person associated with the telephone system or the UM8700 system, usually through ownership of a telephone extension device or a Subscriber mailbox. (This definition applies even if the subscriber pays no fee to use the system.) A caller is anyone who calls into the system, but is generally referred to as a non-subscriber and as someone attempting to reach a subscriber.

This chapter discusses what you need to know about subscribers and how they use the telephone system before you configure their Subscriber mailboxes. It also discusses Mailbox COS and their use. For specific definitions of the controls within a mailbox, consult the online help within UM8700 Admin.

Working with Mailbox COS

Mailbox COS can be created to manage settings on one or more Subscriber mailboxes. The Mailbox COS looks very similar to the Subscriber mailbox and provides the same general settings. Settings that are specific to each subscriber must be individually configured within the Subscriber mailbox. The administrator can perform the following tasks with a Mailbox COS:

- Create a class of service to be used as default settings for new subscribers
- Change existing subscriber settings by assigning them to a class of service
- Modify the default settings of a class without changing the Subscriber mailboxes in that class
- Apply settings simultaneously to all or selected Subscriber mailboxes within the class

To perform these tasks, the administrator must add subscribers to the class by using the Class Information tab. Once subscribers are assigned, the administrator can edit their mailboxes by applying class of service settings, or by modifying them individually. The administrator can also remove members of the class of service at any time.

Some settings in the Subscriber mailbox are specific to individual subscribers and are therefore not available in the Mailbox COS. The following table lists the settings that are Subscriber mailbox-specific.

Tab	***Subscriber-Specific Settings***
Class Information tab	None
Main tab	Extension Number, SMDI Prefix, Direct Dial number, MWI, Names, E-Mail, Important Public Numbers, Member of Distribution Lists, Group Assignments
Answering tab	None
E-mail tab	All, except ICA and Primary Message Template
Features tab	None
Presentation tab	None
VIM tab	None, except Personal Assistant Availability
Recordings tab	Subscriber Recordings
Speech tab	All except VUI and Contact Settings
Devices tab	All
SMS tab	All, except for Allow
Message Notification tab	All, except for Allow and Allow Daily Msg Reminder
Message Forwarding tab	All, except for Allow

Assigning Subscribers to a Class of Service

Once you have created a Mailbox COS, you can assign Subscriber mailboxes to the class of service.

NOTE You must have administrative access to Mailbox COS to perform this procedure.

To assign Subscriber mailboxes to a class of service...

1. Start UM8700 Admin.
2. Select a Mailbox COS in the Mailbox List pane.
3. Open the Mailbox COS.
4. On the Class Information tab, click **Add Members**.
5. Select the Subscriber mailboxes you want to add, and then click **OK**.
6. Do one of the following:

If you want to ...	*Then ...*
Assign the settings of the class of service to an individual subscriber	Select the subscriber on the Subscriber Members list and click **Reset to Defaults**.
Assign the settings of the class of service to all the subscribers	Click **Select All**, and then click **Reset to Defaults**.
Leave the settings of the subscriber's mailboxes unchanged	Continue to step 7.

7. Click **Save Mailbox**.
8. Alternatively, you can assign Mailbox COS to a Subscriber mailbox by adding a Mailbox COS to the Class Information assignment on the Main tab. Once you have added the mailbox, you can update the subscriber's settings to those of the Mailbox COS by clicking **Update Subscriber**.

Working with Subscriber Mailboxes

Before a Subscriber mailbox is ready for use, you must configure the basic settings that determine how that mailbox interacts with other UM8700 mailboxes and with the telephone system. The Main tab, which displays when a Subscriber mailbox opened, contains these settings. To configure the basic settings for each mailbox correctly, you should know the answers to the following questions:

- What range of numbers is appropriate to use for Subscriber mailboxes? If you are one of a group of people administering the system, you may have already made decisions about what numbers to use for Subscriber mailboxes. If your local system is part of a larger network, the administrator of the network may have assigned specific ranges of numbers to use for your mailbox-numbering plan.
- By what names should the subscriber be addressed, first name, middle name, last name?
- Is the subscriber going to receive e-mail messages from UM8700?
- In what Group or Groups should the subscriber appear? Groups are used to disambiguate subscribers and allow separate speech directories to be created for specific groups of subscribers.
- Should the mailbox be enabled, and if so, when? Should it receive messages? Coordinating the Enable Mailbox and Setup Tutorial Required settings of the Main tab, and the Accept Messages setting on the Features tab ensures the mailbox is setup correctly. You can choose whether or not the mailbox receives messages, and if it receives messages, when it receives messages.
- Is the subscriber required to go through the UM8700 setup tutorial? If not, are you expected to assign the subscriber a security code?
- What telephone device number, if any, is assigned to the subscriber? When you assign a device number in the Extension number field, any call that results in an incomplete transfer to that number is connected to the subscriber's mailbox.

IMPORTANT Subscriber mailboxes are assigned to a specific switch section. If you have more than one switch section, verify the switch section to which the mailbox should be assigned before you create the Subscriber mailbox. If you do not set the switch section correctly, the subscriber may not be able to receive calls through the system to the extension device.

- Do mailbox numbers and extension device numbers need to match? Although many systems follow this convention, yours may not. However, this is the default, so when you create a new Subscriber mailbox, the subscriber's extension device number defaults to the mailbox number.
- Is the system networked with other UM8700 systems? Should the subscriber directory information be propagated to other UM8700 System Servers?

NOTE For more information about propagation, see the online book *NetConnect Digital Networking*.

Configuring the Subscriber Mailbox to Receive Messages

It is important to coordinate the Accept Messages setting on the Features tab with the Enable Mailbox and Setup Tutorial Required settings on the Main tab. In combination, these three settings determine if, and when a Subscriber mailbox is enabled and able to receive messages. The following table displays different combinations of these settings and their results.

Setup Tutorial Required (Main tab)	***Accept Messages (Features tab)***	***Enable Mailbox (Main tab)***	***Mailbox Behavior***	***Resulting Prompt***
Selected	**After Setup** or **When Enabled**	**After Setup Tutorial**	Does not accept messages until the setup tutorial is complete	"Invalid mailbox"
Selected	**After Setup**	**Yes**	Does not accept messages until the setup tutorial is complete	"This mailbox is not activated and not accepting messages"
Selected	**When Enabled**	**Yes**	Accepts messages	'Mailbox has not been activated. To leave a message..."
Cleared	**Never**	**Yes**	Never accepts messages, but allows the subscriber to log in and record a personal greeting	"This mailbox is not accepting messages"

Setting Message Retention Time on the Features tab

The System Server automatically deletes each subscriber's voice messages after the number of days set on the Msg Retention box during the daily maintenance routine. After a message is automatically deleted, the Call Server plays the following prompt:

"This message was stored too long and automatically erased."

Enter the number of days to retain messages or select Unlimited to disable the feature.

NOTE These settings do not apply to subscribers whose Message Storage Location is set to External, such as with server based Unified Messaging.

Changing or Resetting a Subscriber's Security Code

Occasionally, you may find it necessary to assign a subscriber a new security code for one of the following reasons:

- The subscriber is having trouble setting the security code.
- The subscriber is having trouble logging on to the system.
- The subscriber is locked out after making too many unsuccessful attempts to log on, and you want to change the security code when you restore the subscriber's logon privileges.

In any of these cases, you can use the following procedure to assign a subscriber a new security code.

NOTE When an administrator changes or resets a subscriber's security code, the Telephony Server removes any lockout that exists for that subscriber.

To change a subscriber's security code...

1. Start UM8700 Admin and log on to the Telephony Server.
2. At the main UM8700 Admin window, select the Subscriber mailbox you want to edit.
3. From the menu bar select **Mailbox**, and then select **Edit**.
4. In the Security Code area on the Main tab, click **Set**.
5. In the New Password box, type the new security code.
6. In the Confirm Password box, type the new security code again.
7. Click **OK** to close the Set Password dialog box, and then click **OK** again to close the Subscriber mailbox.

Use the following procedure to reset the security codes of subscribers who have forgotten them. This procedure replaces a subscriber's existing security code with the default security code defined on the Messaging tab in the System Configuration dialog box.

To reset a subscriber's security code...

1. Start UM8700 Admin and log on to the Telephony Server.
2. At the main UM8700 Admin window, select the Subscriber mailbox you want to edit.
3. From the menu bar select Mailbox, and then select **Edit**.
4. In the Security Code area on the Main tab click **Reset**, and then click **OK**.

Configuring the Security Code Reset Feature

The Security Code Reset feature allows subscribers to request a security code reset from Web PhoneManager if they have forgotten their mailbox number or security code. You must configure both UM8700 and Web PhoneManager before subscribers can use this feature.

The Security Code Reset feature allows subscribers to enter their mailbox number or e-mail address from the Security Code Reset Request page of Web PhoneManager and the information is passed to UM8700. UM8700 sends an e-mail message to the subscriber, and then posts an E-Mail Sent confirmation with the subscriber's mailbox number and mailbox name back to the Web PhoneManager URL.

The subscriber clicks the URL embedded in the e-mail message that opens the Reset Security Code web page. From the web page the subscriber enters a new security code, and then using the new security code can log on to Web PhoneManager.

NOTE To use the security code reset feature the Subscriber mailbox cannot be a shared mailbox and the subscriber's e-mail address must be unique.

Configuring UM8700

The following fields and information on the System Configuration tabs of UM8700 Admin must be configured prior to subscribers using the Security Code Reset feature:

- SMS/SMTP Tab
- Add and enable an SMTP or Simple UM provider with the appropriate information required to access the provider. It is recommended that you use encryption to secure the connection to the SMTP server, but it is not required.
- In the SMTP default provider field, select the SMTP or Simple UM provider from the list, and then click **Apply**.

  NOTE The default SMTP provider is the provider UM8700 uses to send system messages to subscriber e-mail addresses. The e-mail address is configured on the Main tab of the Subscriber mailbox.

- Messaging tab
- Select the **Allow subscribers to reset their security code** check box to enable the Reset Security Code feature on the Main tab of Subscriber mailboxes. This feature allows subscribers to reset their mailbox security code from Web PhoneManager.

  NOTE When you select this checkbox, the *Allow Subscriber to Reset Security Code* checkbox on the Main tab of Subscriber mailboxes is selected by default. To disable the feature on a per subscriber basis you must clear the checkbox on the Main tab of the Subscriber mailbox.

- In the Reset Request Expiration Time (minutes) field, enter the number of minutes the security code reset link is valid from the time of creation (1-1440 minutes). The default is ten minutes.
- In the Message Template field, select the XML message template used to describe the reset security code procedure to subscribers. By default, the Message Template is configured to use the system provided default template file, DefaultSecurityCodeResetMessage.xml. It is recommended that you copy this file and use the copy to configure your site-specific information. At the very minimum, you must change the URL to direct subscribers to your Web PhoneManager website. However, there are additional fields to edit such as the helpdesk contact information for your company. For more information on customizing XML message templates, refer to the topic "Modifying XML Message Phrase Templates."
- Main tab of the Subscriber Mailbox

  The following fields on the Main tab of Subscriber mailboxes must be configured prior to subscribers using the Security Code Reset feature:

- In the Subscriber Information group, enter the subscriber's e-mail address. This is typically the e-mail address from which a subscriber receives business-related messages.
- In the Security Code Group, select the **Allow Subscriber to Reset Security Code** checkbox, and then click **OK**. This checkbox is selected by default, but does not apply unless the *Allow subscribers to reset their security code* field is selected on the Messaging tab of System Configuration.

Configuring Web PhoneManager

The following fields and files must be configured on Web PhoneManager must be configured prior to subscribers using the Security Code Reset feature:

NOTE For more information on Web PhoneManager requirements and configuring Web PhoneManager, refer to the Web PhoneManager™ online book. This book is located on the UM8700 Telephony Server DVD.

- Log onto Web PhoneManager admin.php to configure Web PhoneManager for subscribers to use the security code reset feature

  NOTE Alternatively, you can configure Web PhoneManager by editing the config.xml file.

- In the Authentication group, select the **Show Security Code Reset Link** checkbox.
- If you are using the Google® reCAPTCHA™ program for security purposes, enter the reCAPTCHA API **Public Key** in the reCAPTCHA API Public Key field.
- If you are using the Google reCAPTCHA™ program for security purposes, enter the reCAPTCHA API **Private Key** in the reCAPTCHA API Private Key field.
- Click **OK** to save changes.

  NOTE reCAPTCHA is a multi-purpose program used on many web sites as a security measure to prevent abuse from automated computer programs by using images and distorted words that humans can read but computers cannot. Users are required to re-type the two reCAPTCHA words in the text box to continue with the process of resetting their security codes. For more information about the Google reCAPTCHA program or to obtain a free reCAPTCHA key, visit http://www.google.com/recaptcha.

- To provide subscribers with contact information for communicating with administrators, open the *contact_admin.xml* file with an XML editor or Notepad and edit the fields with the appropriate contact information for your site. The file is found in the root directory of the Web PhoneManager directory, for example, C:\Inetpub\WPM. In addition, there is a sample file in the directory*, contact_admin_sample.xml*.

Configuring and Removing Subscriber Lockouts

You can configure the System Server to lock out Subscriber mailboxes if someone makes an excessive number of unsuccessful attempts to log on to those mailboxes. This protects the system against anyone who might attempt to break in by trying to log on with a succession of mailbox numbers and passwords. The following procedure explains how to set the conditions under which the system locks mailboxes against further logon attempts.

To configure the Subscriber mailbox lockout conditions...

1. Start UM8700 Admin and log on to the Telephony Server.
2. From the menu bar, select **Configuration**, and then **System**.
3. In the System Configuration dialog box, click the **Messaging** tab.
4. Within the Security Code group, clear the **Disabled** check box.
5. In the Max Lockouts box, type or select the number of times a caller is allowed to try logging on to a Subscriber mailbox unsuccessfully before being locked out of that mailbox.
6. Click **OK**.

To remove a lockout from a Subscriber mailbox...

1. Start UM8700 Admin and log on to the Telephony Server.
2. Open the affected Subscriber mailbox.
3. In the Security Code group on the Main tab, clear the **Lockout** check box.
4. If necessary, change the subscriber's password. For more information, see "To ensure the maximum security of your UM8700 system, you can set advanced security code requirements in the System Configuration dialog box.
5. Click **OK** to save your changes.

Setting Advanced Security Code Requirements

To ensure the maximum security of your system, you can set advanced security code requirements on the Messaging tab of the System Configuration tabs. These requirements include the following:

- The Expiration Period allows you to set the number of days the security code is valid. Select the Unlimited check box if you do not want the security codes to expire.
- The Grace Period allows you to set the number of days a password remains valid after the expiry date. Select **None** if you do not want to allow a grace period.
- The Max Lockouts setting allows you to configure the maximum number times a caller can attempt to log on to a mailbox before the mailbox is locked out. Select the Disabled check box to disable this feature.
- The Retain History setting enables you to select the number of security codes stored before subscribers can repeat them.
- The Strong Passwords setting ensures security codes have at least three unique digits, not contain the mailbox number, and not form a simple arithmetic sequence.

To set advanced security code requirements...

1. Open UM8700 Admin.
2. From the menu bar, select **Configuration**, and then **System**.
3. Click the **Messaging** tab.
4. In the Security Code section, set the number of passwords to retain in Retain History.
5. Select the **Strong Passwords** check box.
6. Click **OK** to exit the System Configuration dialog box and apply your changes.

7. Edit each Subscriber mailbox in which you want to enforce the Advanced Security Code requirements. On the Main tab of the Subscriber mailbox, select the Use Advanced Security Policy check box.

IMPORTANT You must select the Use Advanced Security Policy check box in all Subscriber mailboxes that uses this security policy.

Configuring Subscriber Telephone Devices

The settings on the Devices tab control which telephone devices are associated with the Subscriber mailbox.

Devices Tab

The Devices tab allows you to configure the subscriber's telephone devices. For example, you can enter Primary extension, a Company Mobile number, a Home Office number, or any other type of device for the system to call in order to reach the subscriber. Basic users probably require only a single extension; however, mobile workers often require more than one device. In addition to identifying the devices, this tab also allows additional settings for controlling how the devices function with the system.

IMPORTANT Regardless of the transfer type, when the automated attendant transfers a call to a subscriber, the Call Server always transfers the call to the primary device regardless of the subscriber's device number entered by the caller, unless the subscriber is using Availability processing. Personal Assistant and Availability are licensed features of UM8700. Licenses are allocated within the system on a per-user basis. A subscriber can only use the features if there is a license currently available.

Device List

Lists the currently configured devices for the subscriber

Add

Click **Add** to add a device. The Add Device dialog box displays.

Select a Device Category from the list, and then give the device a name or use the default name.

Delete

Select the device you want to delete, and then click **Delete**. Click **Yes** to confirm the deletion.

Edit

Click **Edit** to edit the selected device. The Edit Device dialog box displays.

Properties

The property sheet displays the current selected device. To view the properties of a particular device, select the device from the list in the Devices List.

Number

Enter the device number in this field.

Device Type/Capabilities

Use this setting to specify the current device behavior by selecting the desired type. To change the device type, select the type from the list. Click the drop-down list to select the Device type you want to define.

For extensions:

- Phone: logon, can receive calls
- Phone: auto logon, can receive calls
- Phone: logon, cannot receive calls
- Phone: no logon, can receive calls
- Phone: operator, can receive calls
- Phone: operator, cannot receive calls
- Fax

For devices other than extensions:

- Phone: logon, can receive calls
- Phone: auto logon, can receive calls
- Phone: auto logon, cannot receive calls
- Phone: logon, cannot receive calls
- Phone: no logon, can receive calls

Category

Select a device category for the selected from the drop-down list. When you select a Category for the device, the properties for the device become input-enabled.

Category Default

Select to make the current device the default device of this particular category. This property defines which device displays on the Main tab and Web PhoneManager when there are multiple devices in the same category.

Primary Device

Select to designate the device as the subscriber's primary device. There can only be one primary device for the mailbox. The primary device is the device to which UM8700 attempts to transfer calls. The primary device can be included in an Availability Find-me device.

The Primary device is the phone number assigned as the subscriber's main office number. For an office worker this is typically the PBX extension. A remote or home worker’s Primary device would be the home office or remote office number. A worker without a fixed phone may set his or her Primary device to a mobile phone number.

IMPORTANT When callers use the automated attendant to transfer to a subscriber, UM8700 always attempts a transfer to the primary device regardless of the subscriber's device number dialed unless the subscriber has Availability enabled and configured.

Primary Mobile Device

Select to designate the device as the subscriber's primary mobile device. Only one device can be designated as a primary mobile device. The primary device can be included in an Availability Find-me device

NOTE You can select a single device as both the primary and primary mobile device. This generally allows a subscriber with a mobile phone only to use standard Find-me device and availability templates.

Mailboxes Sharing this Number

Displays a list of mailboxes sharing the number that you entered in the Device Number field

Extension Properties

The Extension Properties are activated when you select Extension as a device type.

MWI

Select to enable MWI (message-waiting indicators) for the current extension device equipped with this feature. This box also reflects the MWI setting on the Main tab of the Subscriber mailbox.

Switch Section

If your telephone system contains multiple switch sections, select the switch section to which the mailbox belongs. This field also reflects the Switch Section field on the Main tab of the Subscriber mailbox.

Direct Dial

Enter a direct dial or DID number for the subscriber. This field also reflects the Direct Dial field on the Main tab of the Subscriber mailbox.

SMDI Prefix

Type a prefix string appropriate to your SMDI-type integration. Refer to the specific Integration Technical Note for more information on this box. This field also reflects the SMDI field on the Main tab of the Subscriber mailbox.

Number

Enter the subscriber's primary extension number. UM8700 uses this number for transferring calls, for clearing and setting the subscriber’s message waiting indicator (MWI), and message notification. This box also reflects the MWI setting on the Devices tab of the Subscriber mailbox.

In addition, when a telephone system retrieves a call from an extension that is ring-no-answer (RNA) or busy and forwards that call to UM8700, the UM8700 server attempts to connect the caller to the first Subscriber mailbox whose primary extension number matches the extension that did not answer. If UM8700 cannot find such a Subscriber mailbox, it attempts to find a mailbox whose alternate extension list contains the extension that did not answer.

Barge In Sensitivity

The Barge-In Sensitivity defaults at 0. You can adjust the Barge In Sensitivity of the device to control how loudly or softly the subscriber must speak in order to ‘barge in’ to a call using

speech commands. A lower setting makes the system less sensitive for this device, while a higher setting makes the system more sensitive. To increase the sensitivity, move the slider to the plus (+) side. To decrease the sensitivity, move the slider to the minus (-) side.

NOTE The scale is not representative of decibel level. By adjusting the barge-in sensitivity, you are increasing or decreasing the base ASR (Automatic Speech Recognition) value of the related Integration. The base ASR values are located in the Integration Specific Parameters of the Integration tab in UM8700 Configuration. These ASR values do not directly correlate to a specific decibel value. The base ASR values are typically set to a default median value of 5 and control the ASR levels for all calls within the specific integration.

IMPORTANT Consult a Technical Support Engineer before changing these values.

Ring Timeout (seconds)

The Ring Timeout default values vary by device type. Use the up/down arrows to change the Ring Timeout from the current default setting. The ring timeout parameter tells UM8700 how long to ring (in seconds) the selected device before considering it a RNA (ring no answer) condition. The timer starts when UM8700 detects ring back.

Active

Select to activate the device, de-select to de-activate the device. The device is active by default.

Use this box to temporarily disable a device rather than remove it from the current mailbox configuration. For example, you can de-activate the device if it becomes inactive for any reason, such as if the device has been lost or broken.

Mobile Device Client Properties (available only when a server is set up for mobile application support via UM8700 Mobile)

Enable Notifications - Select Enable Notifications to enable Mobile Device Notifications for incoming calls and badge updates.

Call Alert Type - Select the call alert type for this device from the list. The options are:

- **None** - No Call Alert is enabled
- **Simple Pop-up** (Balloon) - Call Alert followed by a Call to the device
- **Accept, Reject Dialog** - Simple Call Alert with accept or reject dialog followed by a conditional Call to the device
- **Accept, Reject, Acknowledge Dialog** - Call Alert with accept, reject, and acknowledge dialog followed by a conditional Call to the device
- **Accept, Reject, Acknowledge, Transfer** - Call Alert with accept, reject, acknowledge, and transfer dialog followed by a conditional Call to the device
- **Accept, Reject, Acknowledge, Record Dialog** - Call Alert with accept, reject, acknowledge, and record dialog followed by a conditional Call to the device
- **Accept, Reject, Acknowledge, Transfer, Record Dialog** - Call Alert with accept, reject, acknowledge, transfer and record dialog followed by a conditional Call to the device

NOTE For call notification, this follows the Call Alert Type in the Device Record. This information is also used by the client application to populate the “OK” and "Cancel" buttons as well as the “Option” dialog options.

Response Timeout (sec) - Enter the number of seconds the UM8700 Notification Service waits for a response to Notification before placing a call anyway, and then presenting the caller with other options such as leaving a message or trying another person. This is the initial time to wait and maybe extended by messages from the Client indicating the user is making option selections

Alert Expiration (sec) - Enter the number of seconds before the request is considered out of date. This value is used to for the fixed UNIX epoch date expressed in seconds which relates to the current UTC time. A value of 0 means that the notification is sent out once but not stored.

Platform Name - Displays the registered mobile device name, the Identifier of the Notification Platform. Registered Applications must use these strings. For example, Apple® or Android®.

Platform Version - Displays the version of the registered mobile device. The information is sent from the Mobile Data Server.

Client Version - Displays the version of the UM8700 Mobile client software.

Model - Displays the model of the registered mobile device. The information is sent from the Mobile Data Server.

Token - Displays the token type. The information is sent from the Mobile Data Server as part of the application registration process. This represents the combination of the mobile device ID and the application ID. It is interpreted based on the Platform ID. The encoding is not known by UM8700. This value is received when the device registered the application.

To add a new extension device for a subscriber...

1. On the Devices tab, click **Add**.
2. Use the drop-down list to select a **Category**, and then overwrite the **Name** if necessary.
3. Enter the **Number** you want the system to dial when this device is contacted.
4. Use the drop-down lists to select a **Category**.
5. Select **Extension** as the Category, the Extension Properties become input-enabled:
6. Enter the telephone number of the device in the Number field.
7. Select the Primary Device box to identify the extension as the primary extension.
8. Select the Category Default box if this is the default device in this category of device types
9. Select the **MWI** box to enable the Message Waiting Indicator function for the extension.
10. Select the Switch Section to which the device belongs (if you have more than one).
11. Enter the Direct Dial (DID) (DIL) telephone number of the subscriber (if applicable).

Setting Subscriber Availability Options

Configuring Availability is now covered in a separate document called *Availability Administration Guide.* This document is in the documentation directory on your UM8700 DVD. Please refer to this document for detailed instructions on configuring UM8700 Availability.

Setting Speech Options

The settings on the Speech tab of the Subscriber mailbox allow you to configure the VUI and Personal Assistant options for the subscriber.

IMPORTANT Automatic Speech Recognition is a licensed feature. You must purchase the appropriate licensing from NEC before you can use the speech features. Licenses are allocated within the system on a per-channel basis. A caller can only use the feature if there is a license currently available. If you license UM8700 for fewer Speech Recognition licenses than the total number of ports, you must enable the application for both Speech and DTMF commands. Callers accessing the system in a Speech enabled only application cannot access Speech commands unless an available licensed resource is available.

VUI

- **Allow** - Select Allow to allow the subscriber to enable or disable the Voice User Interface (VUI) feature in Web PhoneManager for their subscriber sessions.

VUI Type (Speech Recognition)

Select the Voice User Interface type for the subscriber. The drop down list contains the following options:

- **None** - Neither the subscriber nor the caller trying to reach the subscriber has any VUI capabilities.
- **Subscriber Session** - The subscriber can use the VUI after logging on to their mailbox to handle calls and navigate menus in the system.
- **Call Completion** - A caller is able to use the VUI to leave a message or reach this subscriber if Availability or other Speech options are configured.
- **Full** - Both the subscriber and the caller can use Speech commands to navigate through the system.

Culture

- Displays the default Speech Recognition culture of the system

Subscriber Access

Select the Speech options that you want to grant to the subscriber.

- **Allow Callback** - Allows/disallows the callback feature usage on a message. If Caller ID/ANI exists, the "call back" command will call the number back if this feature is allowed.
- **Total Hands Free** - Provides the subscriber with speech access at all times. Allows a subscriber to handle multiple calls (incoming and outgoing), as well as any messaging tasks. Uses one additional port for every call involved in the session.

Personal Assistant

- **Allow Call Recording** - Allows the subscriber to record a call and have the system save the recording as a message.
- **Allow Calendaring** - Allows the subscriber to access calendar information from the e-mail client.

NOTE Requires integration to an Exchange or Notes server.

- **Callback** - Allows/disallows the callback feature usage on a message. If Caller ID/ANI exists, the "call back" command will call the number back if this feature is allowed.
- **Whisper Call Waiting** - Allows the subscriber, while logged on to their Subscriber mailbox, to hear a soft audio prompt when an automated attendant call is incoming to their device. It will also provide an "incoming call from <name>" while in a joined call. Requires that the "Total Hands Free" feature is enabled.
- **Record Missed Calls** - Allows the subscriber to hear the recorded name of the person who was presented with the Subscriber mailbox but hung up before leaving a message. In addition, with UM, the subscriber receives an e-mail with the call information in the subject line, such as caller ID, if provided.
- **Confirm Contacts Before Dialing** - Accesses the subscriber's contact list in order to match the number to a contact prior to placing an outgoing call.

NOTE The Live Record action of the Call Processor mailbox is not related to the Call Recording feature of Personal Assistant. Call Recording is enabled on the Speech tab of the Subscriber mailbox; it requires a Personal Assistant license. Although the two features are similar in what they accomplish Live Record is an action type of the Call Processor mailbox and requires no additional licensing.

Contacts

- **Refresh Mode** - Select how to have the contacts database refreshed:
- **Automatic** - The contact folder is checked each time the subscriber logs on to the mailbox. If changes are detected, the contact list is automatically refreshed. The system prompts the subscriber when the contact list is being refreshed.
- **Disable** - The contacts are not refreshed automatically and must be updated by voice command. This is the default setting.
- **Nightly** - The contacts are refreshed during the daily maintenance routine.
- **Store Location** - select:
- **Local** - The contacts are stored on the UM8700 server. This is the default setting.
- **External** - The contacts are stored on an external server.

NOTE Requires integration to an E-mail server.

E-mail Signature

Use Standard Company Signature

Select to use the standard company signature. This is the default setting. When you de-select the box, the field becomes available to create a unique e-mail signature for the subscriber. The

Speech E-mail Standard Company Signature is defined in the Messaging tab of UM8700 Admin.

NOTE Requires integration to an E-mail server.

Setting a Personal Operator

When a caller is sent to a Subscriber mailbox, the caller always has at least two choices: leave a voice message or press zero to transfer to an operator. You can ensure that all callers who press zero in this mailbox go to the same operator telephone number by entering that number in the Personal Operator box.

NOTE The value in the Personal Operator box applies only to callers who transfer to the operator from the Subscriber mailbox during the subscriber's personal greeting. If the subscriber has, Extension Specific Processing (ESP) enabled and the caller presses 0, the action assigned to the 0 key in that Call Processor is used.

Setting Busy Options on the Answering tab

By default, a Subscriber mailbox deals with all incomplete transfers the same way: it advises the caller that the subscriber is not available (optional), it plays the subscriber's greeting, and gives the caller the options of leaving a voice message or pressing 0 to speak to an operator. However, using the Busy Action list box, you can set the Subscriber mailbox to take one of the two following special actions if the subscriber's primary device is busy:

- Play a separate greeting, called the subscriber's busy greeting (Announce)
- Put the caller, and any additional callers who arrive during the subscriber's current call, on hold until the subscriber hangs up (Queue)

If you select Queue, you must also configure the Retry Interval, Retry Attempts, and Announcement settings. These three settings work together as follows:

1. A caller is answered by the Call Server and dials the subscriber's extension. On detecting that the subscriber's extension is busy, the Call Server alerts the caller that the extension is busy and prompts the caller with an option to hold.
2. The Call Server plays the contents of the hold Announcement mailbox, if specified in the Announcement box, and then waits for the number of seconds specified in the Retry Interval box.
3. If the retry interval passes and the caller cannot yet be transferred to the subscriber, the Call Server gives the caller the option of pressing a key to continue holding.
4. If the caller chooses to continue holding, the Call Server repeats steps 2 and 3 for the number of times specified in the Retry Attempts box, then passes the call to the designated Call Processor (either the next Call Processor as designated in the Call Processor that is currently active, or the active Call Processor itself).
5. The Call Server repeats steps 2 through 4 for any other callers who are holding to speak to this subscriber, starting with the caller who has been holding the longest.

NOTE To prevent callers from hearing silence while they wait on hold, use the "hold" Announcement mailbox and create a music loop at least as long as the retry interval.

In addition, the following settings are required to support the Call Queuing feature:

- On the Environment tab of UM8700 Admin's System Configuration dialog box, the DTMF to remain on Hold box must be selected unless you are certain that the telephone system can always signal the Call Server that a caller has disconnected.
- The transfer type must be either Transfer or Monitor Transfer.
- You must configure the Maximum Ports on Hold parameter of the corresponding Switch Section of UM8700 Configuration for the maximum number of ports you want to use for Queuing.

Assigning the General Greeting

A general greeting is an Announcement mailbox that can be played before the subscriber's personal greeting or when a personal greeting has not been recorded. The general greeting is configured on the Answering tab of each Subscriber mailbox. You can also configure the general greeting for a specific group of subscriber's by assigning them to a Mailbox COS with the general greeting configured.

To configure the general greeting...

1. Start UM8700 Admin, and then double-click the Subscriber mailbox you want to edit.
2. Click the **Answering** tab.
3. Select one of the following greeting introductions:
   - **None**
   - **Default** - plays the General Greeting configured on the Environment tab of the System Configuration.
   - **Announcement** - plays the chosen Announcement mailbox
4. Select when to play the general greeting by selecting either:
   - **Play Before Personal Greeting** - plays the general greeting before the subscriber's personal greeting.
   - **Play When No Personal Greeting Recorded** - plays the general greeting when one has not been recorded.
5. Additionally, you can disable DTMF while callers listen to a subscriber's greeting. Select one of the following from the Disable DTMF During Personal Greeting list to enable this setting:
   - **Never**
   - **Always** - disables DTMF while any of the subscriber's personal greetings are playing
   - **When Play Out-of-Office** - disables DTMF only when the subscriber's out-of-office greeting is playing

Configuring Extension Specific Processing (ESP)

When a caller is directed to a Subscriber mailbox through a transfer action, a forwarded call, or a Subscriber Message action, the caller has three options: leave a message, press 0 for an operator, or hangup. If a subscriber or department wants any additional call processing capability beyond these three options then the Administrator must create and assign an Extension Specific Call Processor mailbox.

Extension Specific Processing is a Subscriber mailbox feature that provides the ability to process calls at the Subscriber mailbox level with a Call Processor mailbox. Use this feature to create a wide range of specific answering applications for the subscriber or for a unique department.

Call Processor mailboxes can be unique for each subscriber or used in a range of Subscriber mailboxes, depending on the application. Typically, a unique Call Processor mailbox is created for each subscriber and the subscriber is made a sponsor of the Call Processor. This allows the subscriber to create announcements in their own voice without having system administrator privileges enabled. When you enter an ESP Call Processor into the Subscriber mailbox ESP Call Processor field the feature is enabled, however the feature is not active until the subscriber logs on to the mailbox and enables the feature through the TUI, the VUI, Web Phone Manager, or the administrator activates it in the mailbox from UM8700 Admin.

In addition to the ESP Call Processor mailbox, the subscriber can also have a separate Call Processor mailbox to be used as a Busy Call Processor. Use the Busy Call Processor mailbox to answer calls when the subscriber's extension is busy and the call is either forwarded back to UM8700 on a busy condition or a transfer attempt was aborted on a busy condition. This feature provides the ability to offer an entirely different set of options to the caller when the extension is busy.

NOTE If the subscriber's telephone device is busy and no ESP Call Processor is specified for busy conditions, the Call Server connects callers to the subscriber's personal greeting on a busy condition. You can use the same EXP Call Processor for the Busy Call Processor, if desired.

You must create a Call Processor mailbox before you can configure it on the Subscriber mailbox.

To add the ESP Call Processor to the Subscriber mailbox…

1. Open the Subscriber mailbox, and then click the **Answering** tab.
2. Point to the ESP Call Processor field, click **Browse**, click the Call Processor mailbox you want to use from the Mailbox Selection list, and then click **OK**.
3. The mailbox is added to the ESP Call Processor field. Notice that once the Call Processor is inserted the Active and the Play Greeting first options become available.
4. To enable ESP Call Processing, check the **Active** box.
5. Click **OK**.
6. The Play Greeting First option allows or disallows the personal greeting recorded in the Subscriber mailbox to play prior to playing any announcement recorded in the ESP mailbox. Select the box to allow the subscriber's personal greeting to be heard first, followed by the Instruction announcement of the ESP Call Processor mailbox.

   NOTE When ESP is enabled, the actions of the ESP Call Processor mailbox are active while the subscriber's personal greeting is played.

7. Repeat the process to configure the Busy ESP Call Processor if desired.

Enabling the Out-of-Office Greeting

Unless they are enabled for Availability, most subscribers' normal personal greetings give no indication of how long they expect to be away from their telephones. The out-of-office greeting notifies callers that the subscriber is away for an extended length of time.

Settings on the Answering tab of a subscriber's mailbox specify whether the subscriber is allowed to create and set out-of-office greetings, and whether the mailbox can accept new messages while the subscriber is away.

NOTE While a subscriber is using an out-of-office greeting but not accepting messages, the message suppression feature takes precedence over the subscriber's personal operator setting. As a result, under these circumstances, callers are returned to the active Answer Mode Call Processor instead of being forwarded to the subscriber's personal operator.

You may also choose one of the following greeting introductions to precede the subscriber's out-of-office greeting:

- **None**
- **System Introduction** - plays the system's out-of-office greeting introduction
- **Announcement** - plays the chosen Announcement mailbox

Setting Subscriber E-mail Options

The settings on the E-Mail tab allow you to configure an e-mail client for the subscriber when the system is licensed to use Unified Messaging, determines how a subscriber listens to e-mail messages, by E-mail Access or Unified Messaging. The following sections provide an overview of both of these features.

Configuring Support for Unified Messaging, E-mail Access, and Integrated Client Access

---

NOTE This is required for voice and fax messaging availability on Android or iPhone mobile clients.

The E-mail server information section establishes the connection between the subscriber's mailbox on the System Server and an E-mail server. Depending on how this association is set up, it can handle the subscriber's messages in one of the following ways:

- Unified Messaging, in which all of the subscriber's messages, voice, fax, and e-mail, are stored on the E-mail server and are available either by telephone or through the subscriber's e-mail Inbox
- E-mail Access, in which UM8700 and E-mail servers function independently, but the subscriber can hear e-mail messages read over the telephone by one of the Call Server's text-to-speech (TTS) readers
- Integrated Client Access/WPM, in which all of the subscriber's messages, voice, fax, and e-mail, are stored on the UM8700 server and are available by telephone or through the subscriber's e-mail Inbox, or Web PhoneManager.

The administrator of the e-mail server must configure an E-mail server profile before the Subscriber mailbox can access the e-mail store. Consult the appropriate online book for the

type of -e-mails system you are integrating with UM8700. To configure e-mail support for a subscriber, you need the following specific items of information:

- The server profile that defines the subscriber's e-mail server on the e-mail server
- The display name that identifies the subscriber on the e-mail server
- The fully-qualified e-mail address that identifies the subscriber on the e-mail server

NOTE To configure or change these settings, you must have an administrator account whose Edit Subscriber E-mail configuration permission is enabled.

The E-Mail tab contains a search tool that allows you to look up the subscriber on an e-mail server by selecting the appropriate server profile and typing the first few letters of the subscriber's name. If the e-mail server supports the Lightweight Directory Access Protocol (LDAP) and it is configured properly, it is usually unnecessary to type in the subscriber's displayed name and e-mail address in the search tool.

IMPORTANT When configuring a subscriber's e-mail settings, you must work closely with the administrator who set up the e-mail server profiles on the System Server. For information on how to set up these profiles and on integrating the telephony and e-mail servers in general, see the online books UM8700 Unified Messaging for Microsoft Exchange, UM8700 Unified Messaging for Lotus Notes and Domino, UM8700 Unified Messaging for IMAP, and Integrated Client Access.

Working with Partial Message Enumeration Settings

The Partial Msg Enumeration settings apply only to specific situations in which a subscriber is using a server based unified messaging and have a large number of messages in their Inbox. Selecting the Partial Msg Enumeration box restricts the number of new messages that the System Server downloads from the E-mail server at one time. At the end of each bundle of new messages, the system offers the subscriber several different options for retrieving the rest of the messages. Additional settings allow the administrator to define the size of individual message bundles downloaded for this subscriber and to determine whether that size should be defined in terms of message age (three days' worth of messages per bundle, for example) or message count.

NOTE The Partial Msg Enumeration box only affects messages that the System Server downloads from an E-mail server. Therefore, it only affects a subscriber using unified messaging and accessing an external message store.

Setting Message-Waiting Indicator (MWI) Behavior

Message Waiting Indicators provide subscriber's with a visual or audio indication that a new message has been delivered to the subscriber's mailbox. Depending on the telephone system your company uses, an MWI can be any one of the following:

- An indicator light on the subscriber's telephone
- An icon or a line of text on the text display of the subscriber's telephone, if such a display exists

- An interrupted dial tone that the subscriber hears immediately after picking up the handset to make a call

In the MWI section of the Features tab, you can observe the Current MWI status (off or on) of the subscriber's MWI and change it if necessary. When you select/deselect the Current MWI checkbox, you send the MWI set or clear command to the telephone system.

You can set the Clear MWI Mode option group to control when the Call Server turns off the subscriber's MWI, as shown in the following table.

To have the MWI turned off ...	*Select...*
When the subscriber has reviewed all new messages in the mailbox and either deleted or saved them all. Choose this setting to closely emulate how Centigram, Octel Intuity AUDIX, and Octel Serenade/VMX TUIs) handle MWI.	Empty
When the subscriber opens the first new message in the mailbox	First
When the mailbox contains no more new messages or no messages at all, Choose this setting to emulate how Centigram, Octel Intuity AUDIX, Octel Serenade/VMX, and Nortel Meridian Mail handle MWI.	All

IMPORTANT If the subscriber is configured to use server-based Unified Messaging (SBUM), the MWI is cleared in the All mode, the Clear MWI Mode fields are grayed out (unavailable). If the subscriber is configured to use Integrated Client Access (ICA), the MWI is cleared in the First mode, the Empty and All modes are ignored. If the subscriber is using Web PhoneManager (WPM), the MWI is cleared in the First mode, the Empty and All modes are ignored.

NOTE If the subscriber is assigned two or more extensions on the telephone system, UM8700 can be configured to set and clear the MWIs on all of those extensions together as the subscriber receives and reads new messages. For such subscribers, the Current MWI check box on the Features tab affects all such extensions.

Assigning Directory Entries

In the Directories section on the Features tab of the Subscriber mailbox, you can select whether or not the subscriber displays in the two directories available on the Call Server. Those two directories are as follows:

- The subscriber directory is available to subscribers when they send messages to other subscribers in the system. This allows them to select recipients by name instead of by mailbox number while logged on to their Subscriber mailbox.
- The automated attendant directory assists outside callers who are trying to reach specific subscribers. This provides callers with the ability to dial by name the subscribers they are trying to contact.

NOTE Adding subscribers to only the subscriber directory hides their telephone numbers from outside callers. This can be appropriate for subscribers such as company executives, who normally exercise tight control over who can contact them directly.

These directory settings do not affect Speech name recognition or the ability to reach a subscriber using a spoken name in a speech directory.

Setting Automated Attendant Options

The Auto Attendant section on the Features tab of the Subscriber mailbox controls whether or not the following optional features are available during this process:

- Call blocking—prevents transfers to the subscriber devices from the auto attendant. Callers are immediately sent to the Subscriber mailbox
- Call screening— allows subscribers to accept or reject an incoming call after listening to a short recording identifying the caller
- The recording help prompt is played after the subscriber's standard greeting. It advises callers to press 1 to leave a message or 9 for other options. A caller who presses 1 is then prompted, "*To start recording, press two. To stop recording, press two again*." (Callers who press 9 at the initial prompt return to the active Call Processor; if it specifies a next Call Processor, the caller is then sent there.) If the subscriber has not recorded a standard greeting, the recording help prompt is the first thing a caller hears upon entering the subscriber's mailbox.
- One of two optional attendant transfer announcements plays: a long version ("Attendant transfer for [subscriber's name]") or a short version ("Attendant transfer"). Alternately, the mailbox can be set to perform the transfer without announcing it.

IMPORTANT The call screening and attendant transfer announcement features does not work unless the transfer type in effect is either a Transfer or Confirmed Transfer. Also, callers hear the following prompt when they are sent to a Subscriber mailbox without a standard greeting recorded or the recording help prompt active: *"To leave a message, please begin speaking at the tone and hang up when you are finished."*

If the subscriber wants one of the mailbox features that require a specific type of transfer, or needs a specific transfer-type set for other reasons, you can set the Transfer Type list box as appropriate for those needs. The following table discusses the differences between the available transfer types.

If the transfer type in effect is…	*Then the Call Server…*
Blind Transfer	Initiates the transfer action and then, dials the subscriber's extension and releases the call.
Confirmed Transfer	Initiates the transfer action and then, dials the subscriber's extension, waits for the subscriber to answer, and if answered, prompts the subscriber to accept the call by pressing 1. Otherwise, the call is retrieved after the time equal to the setting in the "Number of Rings to Transfer" field on the Messaging tab has expired.
Monitored Transfer	Initiates the transfer action and then, dials the subscriber's extension and waits for ring back tone before it releases the call. If the Call Server detects busy or reorder tone, it treats the call as

	an incomplete transfer.
Transfer (also referred to as a supervised or T-type transfer)	Initiates the transfer action and then, dials the subscriber's extension and waits for the subscriber to answer before it releases the call.
Default	Transfers the call using the Call Server's default transfer type. The transfer type is dictated by the transfer type configured on the active Call Processor for automated attendant transfers, while the default transfer type on UM8700 Admin's Environment tab dictates the transfer type subscriber's use when logged on their mailboxes For example when using Live Reply feature.

NOTE In the Transfer Type list box, the word *Transfer* is abbreviated to *Xfr*.

Setting System Presentation Options

The settings on the Presentation tab of the Subscriber mailbox regulate how the Call Server presents message information to the subscriber, and the subscriber can set and change most of those settings directly. However, an administrator must configure or change the following:

Options configured by the Administrator only:

- The Subscriber Interface for Fwd Calls check box determines what happens when this subscriber calls another subscriber and is connected to that subscriber's mailbox. After leaving a message, if this box is selected, the subscriber can forward the message and set urgent status if desired. However, if this box is cleared, the subscriber can only return to the active answer mode Call Processor after leaving a message.
- The TUI Type list box determines which telephone user interface (TUI) layout the subscriber must use: the standard layout used in most NEC systems, or alternate layouts such as those used in Octel Aria, Centigram, Nortel Meridian Mail, and Octel Serenade/VMX systems. If an alternate emulation is selected, the subscriber has choices similar to those available of that system when reviewing, sending, or answering messages.

  NOTE The TUI-Type setting affects only the subscriber's main menu and the menus the subscriber encounters while handling messages. The PhoneManager menu and the system administrator's menu move to different positions in the main subscriber menu when other emulations are active, but the structure and organization of those menus do not change. Note also, if an alternate TUI is selected, the subscriber's default Prompt Language setting must be set to a language that supports that emulation. For information on which languages currently provide such support, refer to the software release notice for this edition of UM8700 or contact Technical Support.

To Set the TUI Type...

On the Presentation tab, select one of the following options from TUI Type drop-down list:

- Select Adomo emulation if the subscriber uses Adomo emulation.
- Select the Audix emulation if the subscriber uses the Audix emulation

- Select Centigram if the subscriber uses the emulation for the Centigram TUI
- Select UM8500 if the subscriber uses the emulation for UM8500.
- Select Meridian Mail if the subscriber uses the emulation for the Meridian Mail TUI
- Select Octel Aria emulation if the subscriber uses the emulation for the Octel Aria TUI
- Select Octel Serenade 200/300 emulation (also known as VMX) if the subscriber uses the emulation for the Octel Serenade TUI
- Select Octel Serenade 200/300 Alternate emulation (also known as VMX) if the subscriber uses the alternate emulation for the Octel Serenade TUI
- Select Original if the subscriber uses the standard TUI. Selecting Original leaves all menu options and keystrokes as they are normally arranged in a UM8700 system.
- Select Original-Alternate Addressing if the subscriber uses the original alternate TUI
- Select UM4730/AD-64 for if the subscriber uses one of these TUIs.

Options the Subscriber Can Configure

The remaining settings on the Presentation tab, which are also available to the subscriber using PhoneManager or Web PhoneManager, control the following aspects of the Call Server's behavior:

- Auto Envelope—sets whether the message envelope, a short prompt describing the date, time, and sender of a message, plays back automatically:
- Before the message (when set for speech emulation, the envelope will only play before the message).
- After the message
- Not at all—available to the subscriber by key press while listening to the message
- Envelope Content—select to have the envelope content is presented in full format or as the date and time only
- Options
- Auto Play First Message—select to have the subscriber hear the first new message after logging on automatically
- Sort Urgent First—select to play back urgent messages first
- Listen by Type—select to sort messages by type (voice, fax, e-mail)
- LIFO/FIFO—the order in which the subscriber hears messages (last-in-first-out or first-in-first-out)

  NOTE If the Partial Msg Enumeration box on the E-mail tab is selected, the subscriber can listen to messages only in last-in-first-out order and cannot listen to messages by priority (that is, urgent messages first). In addition, Partial Msg Enumeration prevents the System Server from announcing the total number of new messages of each type in the mailbox if the subscriber has activated message presentation by type.

- Time Zone—the subscriber's current time zone (if different than the System Server)
- Language
- Initial TTS—the initial text-to-speech (TTS) language used for playback over the telephone

- Client Display—the language used for the client's Unified Messaging for Microsoft Exchange, Unified Messaging for Lotus Notes, and Web PhoneManager profiles
- Prompt Language - The language used for voice prompts to the subscriber and callers who are connected to the mailbox

Setting Callout Permissions

The Callouts section of the Features tab of the Subscriber mailbox specifies the types of numbers to which the Subscriber mailbox can make an outbound call. Callout settings apply not only to outbound calls that the subscriber places from the mailbox, but also to actions requiring the Call Server to place an outbound call on the subscriber's behalf. Such actions include the following:

- Immediate Message Notification (Msg Notification tab)
- Daily Message Reminder (Msg Notification tab)
- Messages to Outbound, AMIS networking, and Fax Delivery mailboxes

In the Callouts section of the Features tab, you can grant the subscriber permission to make outbound calls to the following types of numbers in any combination:

- Other extensions within the company's telephone system
- Local telephone numbers in the public switched telephone network (PSTN)
- Long-distance telephone numbers - If you allow the subscriber to make long-distance callouts, you have the option of limiting such callouts to three or fewer specific area codes.
- International - Select to allow international callouts for the subscriber. If you select International, the subscriber is allowed to place international calls only to numbers classified by the applicable Dial Plan as International.

NOTE On systems that are upgraded from a previous version of software, the International field takes on the value of the Long Distance setting. If Long Distance is *Yes*, it is checked (enabled). If Long Distance is *No* or *Specific*, it is unchecked (disabled). New mailboxes have a default value of disabled (unchecked).

The callout settings of a Subscriber mailbox are dependent upon the Dialing tab and the Callout tab of UM8700 Admin's System Configuration.

- The Dialing tab allows you to configure Dial Plans and Dialing Instructions are assigned to each individual Call Server in the Dialing Plan Server Assignments dialog box. You must configure the Dialing plan to allow the type of callouts you want to enable in a Subscriber mailbox for each Call Server the subscriber might use. The Call Server uses its dialing plan to determine which dialed numbers are extensions, which are local calls, and which are long-distance calls.
- The Callout tab allows you to configure how the Call Server responds when a callout attempt results in a ring no answer or busy condition. The tab also has fields for configuring callouts to digital pager devices, including the callback number to send to the digital pager, the delay to wait before the Call Server sends the callback number, and an urgent message prefix if required.

In addition, you must configure the Callout Limit Settings of the Local Switch Section Settings area on the Switch Section tab of UM8700 Configuration to allow the type of callouts you want

to allow for subscribers. These parameters control the maximum number of ports in the Switch Section that are allowed to make callouts, by callout type. See "*Configuring Callout Settings*," in the online help.

Trunk to Trunk Transfers

On some telephone systems, you can also enable trunk-to-trunk transfers for the subscriber. This feature is convenient for subscribers who call the Call Server and log on to their mailboxes from outside the telephone system. If the subscriber uses Live Reply to respond to a message from an outside caller, and the original caller answers the call, the Call Server can then signal the telephone system to connect them directly. After the connection is made, the Call Server has been removed from the call and the line the subscriber had been using is free for other calls.

IMPORTANT Before you enable trunk-to-trunk transfers, check with the telephone system administrator to verify that the system provides complete support for such transfers, including the ability to release the call when it is complete.

Configuring Immediate Message Notification

Immediate Message Notification is a Subscriber mailbox feature that provides subscribers with immediate notification of a new message to a list of telephone device numbers. The settings on the Msg Notification tab allow administrators to configure Immediate Message Notification (IMN) settings, allow, and enable IMN on a subscriber's behalf.

When IMN is enabled in a subscriber's mailbox, the Call Server attempts to contact the subscriber by telephone if it receives a new message that meets certain criteria the subscriber specifies. The subscriber can select any combination of the following criteria:

- Notify Status—Urgent (urgent messages only) or All level
- Notify Specific ID—select a specific Subscriber mailbox
- Message type—voice, fax, e-mail, or all
- Time of day
- Day of the week

When an eligible message arrives, the Call Server attempts to contact the subscriber by trying each telephone number in the Personal Call List. The subscriber can specify the following information for each number on the list:

- Whether it is a normal telephone (Normal), a voice-announce pager (Radio), a digital pager (Digital), or a PIN pager
- The PIN required to page the subscriber, if the number belongs to a PIN pager
- The number of minutes to wait for the subscriber to log on and retrieve the message before calling the next number on the list

The settings available for IMN provide flexibility. For example, a subscriber can select an IMN configuration that reflects the following instructions:

"If I get an urgent e-mail or voice message from my boss between 9:57 AM and 7:32 PM, Tuesday through Saturday, page me immediately. If I do not pick up the message within 20 minutes, call my cell phone. If I do not answer there, call my home phone. Try each of these numbers five times."

Subscribers can configure and change almost every setting on this tab using the TUI or Web PhoneManager. The only exceptions are the two Busy Retry settings, which determine how the Call Server reacts if one of the numbers on the personal call list is busy. When this happens, the Call Server makes the specified number of attempts to call that telephone number, waiting for the number of minutes shown in the Interval (min) box between attempts, and then continues with the next number on the personal call list.

NOTE Subscribers can also activate the daily message reminder, a brief advisory that messages are waiting, using PhoneManager or Web PhoneManager.

Configuring Automatic Message Forwarding

Automatic Message Forwarding is a Subscriber mailbox feature that allows subscribers to automatically forward copies of their messages to another subscriber. The Automatic Message Forwarding tab allows administrators to set automatic message forwarding options: allow, enable, and disable the feature a subscriber's behalf.

When Automatic Message Forwarding is on in a subscriber's mailbox, the System Server forwards a copy of the messages sent to a designated Subscriber mailbox based on the criteria the subscriber specifies. The subscriber can select any combination of the following criteria:

- Notify Status—Urgent (urgent messages only) or All level
- Notify Specific ID—select a specific Subscriber mailbox
- Message type—voice, fax, e-mail, or all
- Time of day
- Day of the week

Subscribers can configure and change almost every setting on this tab using the TUI or Web PhoneManager.

IMPORTANT Subscribers cannot use automatic message forwarding if they are using unified messaging with an external message store. For these subscribers, the System Server passes all incoming messages directly to the E-mail server. However, the E-mail server may provide automated message handling capabilities of its own. For more information, contact the administrator of the E-mail server or consult that server's software documentation.

Managing Subscriber Recordings

The settings on the Recordings tab of the Subscriber mailbox are used to import custom audio recordings and to grant subscribers system access rights.

In the System Access section of the Recordings tab, you can grant the subscriber the ability to record or change the following recordings for the system:

- The server's system broadcast message (an announcement message played to all subscribers just after they enter their mailbox numbers and security codes)
- The recorded names and greetings (announcements) for the server's mailboxes

IMPORTANT These access rights are assigned normally to administrators. Subscribers do not need these rights set to change their own mailbox recordings or recordings associated with other mailboxes they sponsor.

The Subscriber Recordings list displays the installed prompt sets and the current recordings for the name and each greeting, if they exist. You can import custom recordings by selecting the appropriate language on the Subscriber Recordings list and clicking Import.

Working with the Subscriber, Fax, SMS, and VIM Tabs

The Fax, SMS, and VIM tabs support advanced features that depend on services or integrations provided by other servers on the network. Separate references included with the UM8700 and Fax server software describe how to set up these three features.

IMPORTANT Before configuring the Fax, SMS, or VIM tab in a Subscriber mailbox, NEC recommends that you familiarize yourself with the corresponding documentation. If another administrator has set up these features on the System Server at your company, be sure to request that administrator's guidance as well.

NOTE To configure the settings on the Fax tab, you must have an administrator account that has the Edit Subscriber Fax configuration box selected. The general purpose of each tab is as follows:

- The Fax tab provides a way of setting up the subscriber's Fax server mailbox from inside the corresponding mailbox on the System Server. This tab is available only if the Fax server integration feature is installed on the System Server. For more information on configuring the servers to work together, see the RightFax documentation and the RightFax Getting Started Guide.
- The SMS tab is similar to the Msg Notification tab, with one exception: instead of calling a telephone number to advise the subscriber that new messages have arrived, UM8700 uses the industry-standard Short Message Service (SMS) to display a brief text message on the subscriber's mobile telephone or pager. For more information about setting up the System Server to support SMS, see the Short Message Service online book.
- The VIM tab contains the information that the system needs to support Voice Intercept Messaging (VIM) for the subscriber. VIM is available only on systems that are integrated with Aastra MX-ONE telephone systems and Aastra Dynamic Network Architecture (D.N.A.) servers. This tab is available only if the VIM feature is installed on UM8700. For more information about configuring VIM support on UM8700, see the Voice Intercept Messaging online book.

Working with Distribution List Mailboxes

Distribution List mailboxes allow you to send a message to a single message and have the message distributed simultaneously to a group of subscribers. Distribution List mailboxes can be configured to be used by any subscriber within the system or restricted to use by the members of the mailbox, to a list of specified subscribers, or to a single sponsoring subscriber only.

This chapter discusses how to perform the following tasks:

- Building a general Distribution List mailbox
- Assigning a personal Distribution List mailbox to a subscriber
- Making a Distribution List mailbox ready for propagation to other System Servers

Building a Distribution List

You can assemble a new Distribution List out of any combination of the following:

- AMIS networking mailboxes
- Other Distribution List mailboxes (either created on the local System Server or propagated from other System Servers)
- Local Alias mailboxes (either local or propagated)
- Outbound mailboxes
- Class of service mailboxes
- Subscriber mailboxes
- Visitor mailboxes
- References to remote subscribers in the remote directories of Network (analog) and Digital Networking mailboxes

Each Distribution List can contain up to 200 entries, and including other Distribution Lists can expand that capacity further if needed. The following procedure discusses the basic steps involved in putting a distribution list together.

To create a Distribution List mailbox...

1. Log on to UM8700 Admin.
2. From the menu bar select mailbox, and then **Add**.
3. In the New Mailbox dialog box, select the server on which you want to create the mailbox.
4. In the Mailbox Type field select **Distribution List**, and then click **OK**.
5. In the Number field, type a mailbox number, and then type a name for this mailbox in the name field.
6. If you want this mailbox to be a personal Distribution List for one subscriber, click the ellipsis button next to the Sponsor field. Select the Subscriber mailbox from the Mailbox Selection List, and then click **OK**.
7. If you want subscribers to be able to search the subscriber directory for this mailbox, select **Include** in the Subscriber Directory box.
8. If you are using Digital Networking and want this mailbox to propagate to other System Servers select the Propagate box.

9. In the Available Mailboxes panel, highlight the mailbox or group of mailboxes you want to add to this mailbox. Hold the CTRL key to highlight more than one mailbox at a time. Click the ⊞ box to expand the list of Subscriber, Class of Service, or Distribution List mailboxes.

NOTE You can use the search function to search for a range of mailboxes. Type the first and last numbers of the mailbox range, and then click Search. Alternatively, type a name in the display field to search for a Subscriber by the display name.

10. Click the **Add** button to add the mailboxes to the Selected Mailbox list.
11. In the Message Acceptance section, select one of the following options to restrict who can send messages to this distribution list:

If you want to allow messages from …	***Then select …***
Anyone	**Anyone**
Members of this Distribution List	**Membership**
Only those listed in the Accept From Mailboxes list	**Specified Mailboxes**, and then click **Add**... to add mailboxes to the list
Only the sponsor of this mailbox	**Sponsor**

NOTE Subscribers can send messages to Distribution List mailboxes only if the Allow Msgs to Distribution Lists feature is enabled on the Features tab of their Subscriber mailboxes

12. Set the Notification Suppression settings so that when a new message is delivered to a Distribution List, subscribers of the list can receive notification through any of the four methods listed. The administrator can control suppression of these notifications in one of three ways:
    - Don’t Suppress Notification - None of the four notification methods are suppressed
    - Suppress All Notification Types - All of the four notification methods are suppressed
    - Suppress Selected Notification Types - Any of the four notification methods can be selected for suppression.

13. Click **OK** to save the mailbox.

NOTE When you record a name for this mailbox, use a term that makes sense after the system prompt, “This message will be sent to …” An example of such a name might be “*the Marketing Department*.” In this case, you might want to enter “Marketing” or “Marketing Department” in the Name box, so that subscribers can find the mailbox easily if you add it to the subscriber directory.

Assigning Personal Distribution Lists

A Distribution List mailbox that a Subscriber mailbox sponsors is known as a personal distribution list. If you have created a personal Distribution List mailbox for a subscriber, the subscriber can record a name for the mailbox and add or remove members through the telephone user interface or Web PhoneManager.

IMPORTANT When you delete a Subscriber mailbox that sponsors another mailbox you are prompted to delete, reassign or release the sponsorship of all sponsored mailboxes. You must choose an option to continue with the deletion.

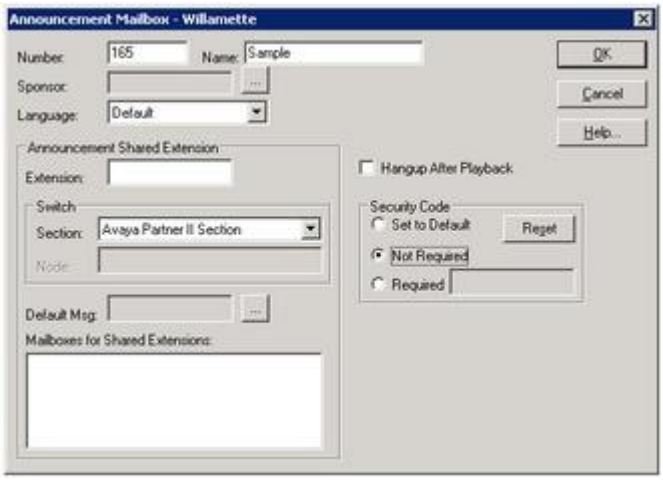
Working with Announcement and Interactive Mailboxes

Announcement Mailboxes

Announcement mailboxes have a simple purpose: they play back an announcement to the caller when the Call Server invokes them. The most common uses for Announcement mailboxes are as follows:

- Playing back audio text (recorded information) to callers who request it
- Providing a standard identifying announcement for extensions shared between several subscribers
- Providing a default introduction announcement for specific shared extensions
- Playing back questions or other speech as part of an Interactive mailbox questionnaire (as discussed later in this section) and delivering the caller's response to the sponsor's Subscriber mailbox

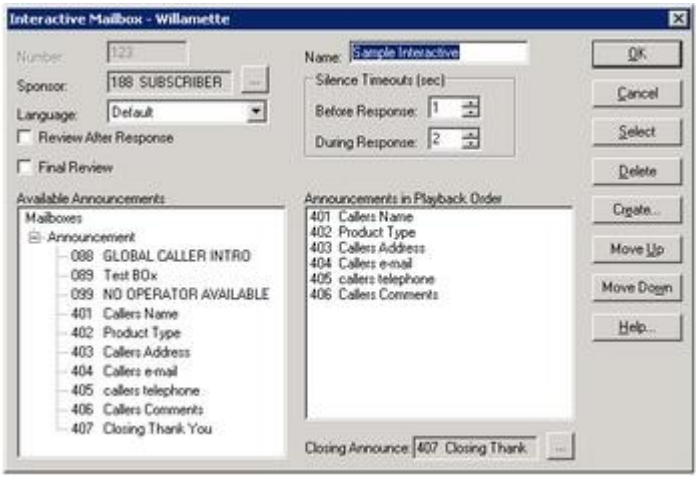
You can configure each Announcement mailbox to be maintained by an administrator or by a sponsoring subscriber. Announcement mailboxes can be password-protected to prevent unwanted access to confidential recordings. When the Announcement mailbox is accessed from a Call Processor mailbox, assign the Key/Event you are using with the Play Announcement Action type. The following image is an example of a typical Announcement mailbox.



Interactive Mailboxes

Interactive mailboxes give callers the opportunity to answer a questionnaire over the telephone. The Interactive mailbox plays back a sequence of Announcement mailboxes, stopping after each one to record a response from the caller. After the entire sequence is complete, the Interactive mailbox combines the caller's responses into a single voice message, which it sends to the sponsor of the Interactive mailbox.

The following illustration shows an Interactive mailbox that has been set up to take a caller's name, the name of the product the caller has purchased, the caller's address, e-mail address, and telephone number, and any comments the caller has about the product, in that order.



Before you create an Interactive mailbox, make sure that the following conditions are true:

- The Call Processor mailbox that allows the caller to access the Interactive mailbox must have a Key/Event programmed with the Interactive Action type.
- All of the Announcement mailboxes are created for the Interactive mailbox. (If you find that an Announcement mailbox is missing, you can add it by clicking **Create**. However, it is usually easiest to create the mailboxes and their announcements in advance.)
- A Subscriber mailbox is assigned as the sponsor of the mailbox.
- If you want the system to hang up after the caller has finished answering the questionnaire, the Hangup After Playback box is selected in the Announcement mailbox that you intend to use as the Closing Announcement mailbox.

Sample Announcements for Announcement and Interactive Mailboxes

Announcement mailboxes are used to distribute and request information.

Suppose delivery people ask the operator several times a day for directions to the company. You can create an Announcement mailbox that contains driving instructions, for example:

"Acme Manufacturing is located in downtown Seattle, just off Interstate 5. From the north, exit at Fairview/Mercer. Turn left at..."

When an Announcement mailbox is used to request information, it must be associated with an Interactive mailbox. Each question is recorded in its own Announcement mailbox. The caller speaks the answers, the Call Server records the caller's responses, and then the message is delivered into the Subscriber mailbox that is sponsoring the Interactive mailbox.

The questionnaire might be something like:

"This is the Acme Manufacturing Service Department. We would like you to respond to six questions. After you hear each question, wait for the beep before responding. Question number 1: Did you buy your product directly from Acme Manufacturing?"

"Approximately how many times have you brought the product to Acme Manufacturing for service in the past year?'

"How many of those times were NOT for scheduled maintenance?"

"Have you experienced any customer service issues?"

"Would you recommend Acme Manufacturing to a friend? Please say why you would or would not."

"If you are willing to speak to a representative, tell us your name and daytime telephone number."

The closing announcement might be:

"Thank you for taking the time to participate in our customer survey. Your responses will help us improve our service to you."

Working with Voice Networking Mailboxes

The UM8700 software provides three types of mailboxes that are designed to network UM8700 systems and enable them to exchange voice messages:

- **Digital Networking mailboxes** exchange messages over any TCP/IP-based data network, including (but not limited to) the Internet. Digital Networking mailboxes also exchange mailbox and switch integration information as well as provide network addresses that allow an administrator to change settings and mailboxes on other servers if global user administration is installed.

  NOTE Digital Networking mailboxes can exchange both voice and fax messages.

- **Network mailboxes** exchange voice messages over standard telephone lines, according to the scheduling settings in place on the System Server. Subscribers whose Network Priority levels are set to Urgent can optionally assign these messages urgent priority for faster delivery. A remote directory in each Network mailbox allows subscribers to look up the names of the subscribers on the remote System Server.
- **AMIS Networking mailboxes** exchange voice messages between UM8700 servers and other voice messaging systems on demand. Such messages must be limited in length and cannot be assigned priority levels; the subscribers who send them must be aware of the recipients' mailbox numbers.

For information about using these mailboxes and configuring System Servers in a network, consult the references in the following table.

For more about …	*Refer to …*
Digital Networking mailboxes	The online help and the online book *Digital Networking*
Network mailboxes	The online help and the online book *Analog Networking*
AMIS Networking mailboxes	The online help and the online book *Analog Networking*

Working with Outbound and Fax Delivery Mailboxes

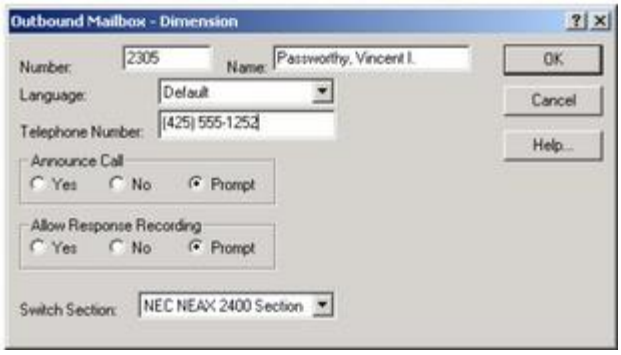
There are two types of mailboxes dedicated primarily to delivering messages, as opposed to handling calls or creating messages. This section describes these mailbox types briefly. For specific details about the controls and settings in each type of mailbox, refer to the online help system.

Outbound Mailboxes

An Outbound mailbox is used by subscribers to deliver messages to a telephone number outside of the system. You can specify this number in the mailbox or leave the Telephone Number box blank to allow subscribers to supply destination numbers of their own.

Optionally, the mailbox can announce the message: *"There is a message for <recipient's name>,* (recorded by the subscriber) from *<subscriber name>. Press any key to listen to this message."* In addition, the mailbox can be configured to ask the recipient to record a response. You can turn these options on or off within the mailbox, or you can allow the subscribers to decide separately for each message by setting both options to **Prompt**.

The following image is an example of a typical Outbound mailbox. Note that the Switch Section box determines the switch section of the Call Server the mailbox uses to place its outbound calls.



Fax Delivery Mailboxes

Fax Delivery mailboxes essentially fulfill the same function for fax messages that Outbound mailboxes do for voice messages. In addition, Fax Delivery mailboxes support Faxtext applications through *same-call delivery*, which allows callers to forward fax documents to themselves.

For more information about setting up a Faxtext application, see the online books *Faxtext* and *Fax Messaging*.

Incoming Calls and Call Types

There are many types of calls that UM8700 answers, and many ways in which UM8700 can answer each call. In its most simple form, UM8700 has no Answer Mode configuration and the caller hears, “Please enter your mailbox number.” Automated attendant call processing capabilities are not available until a Call Processor mailbox is created, and then entered into the Answer Mode configuration.

The Call Processor mailbox provides the automated attendant capabilities of the Call Server. The most basic automated attendant application requires a Call Processor mailbox configured with a transfer action type, and then entered into the Answer Mode. The application is typically expanded using different Call Processor mailboxes in the Answer Mode to answer based on the time of day and day of week. DTMF keys or Speech commands are assigned to various actions of the Call Processor mailbox to provide transfers, log on capabilities for subscribers, IVR applications, and other audio text applications.

Outside calls received without route code information or integrated data are answered by the automated attendant, the Call Processor mailbox that is currently active in the Answer Mode configuration. This is typical automated attendant call processing. When integrated call type information is sent to UM8700 with an incoming call, the information is used to route the caller to a specific mailbox. Integrated calls bypass the Answer Mode.

Incoming calls are broadly categorized into three groups: direct, forwarded, and transferred. Within these three groups are sub-groups that are described in the following list.

Transferred Calls (Automated Attendant)

- **Transferred Calls**—There are four transfer Action types available in a Call Processor mailbox. In general, use a Blind transfer when the telephone system is fully integrated and call type forwarding information is sent to the telephony server. Use a Monitor transfer action when the telephone system is integrated but does not support a blind transfer to a busy extension or does not distinguish a forwarded busy call from a forwarded RNA call. Use a Transfer (supervised) action if no integration is supported, if transfers are going to off-net extensions but call progress tones are still provided or to attendant consoles that do not support blind transfers. Use a Confirmed transfer action if no call progress tones are provided by the telephone system, or another transfer type cannot perform transfers to the PSTN or a mobile device. For more information on transfer actions, refer to the topic on Call Processor Action types.

  NOTE When the number dialed by the caller is not associated with any Subscriber mailbox, the Call Server returns the caller to either the Call Processor mailbox that initiated the transfer or the Next Call Processor mailbox, if defined, in the event of an incomplete transfer.

Direct Calls

- **Direct Call, External—Non-Integrated** - Calls originating from outside the telephone system with no caller information are answered by the Answer Mode Call Processor mailbox.
- **Direct Call, Internal—Non-Integrated** - Calls originating from inside the telephone system with no caller information are answered by the Answer Mode Call Processor mailbox.

- **Direct Call, External—Integrated** - Subscribers who have their mobile phones or home phone listed in their Subscriber mailboxes as a Trusted Logon device bypass the Answer Mode and are presented with log on prompting at their mailbox. This feature works only if UM8700 receives ANI (Automatic Number Identification) or CPID (Calling Party Identification) information from the PSTN.
- **Call Routing** - This call type includes outside calls that provide Call Routing information. These call types are answered by specific Call Processor mailboxes sorted by the Call Processor mailbox number in the Answer Mode configuration. See the topic on Route Codes for more information.
- **Direct Call, Internal—Integrated** – Subscribers who call the system from their extension device and have a Subscriber mailbox associated with the extension are greeted with, “Please enter your security code.”

Forwarded Calls

- **Forwarded Call, External, or Internal—Non-integrated** – A subscriber’s telephone is forwarded to UM8700 but there is no calling or called party information sent with the call. UM8700 answers with the Answer Mode Call Processor mailbox.
- **Forwarded Call, External—Integrated** – An outside caller is forwarded to the Subscriber mailbox on a RNA, Busy, or Do Not Disturb (DND) condition at the subscriber's primary device. If the telephone system sends conditional data such as RNA or busy, the caller is offered options based on the condition. Other integrated data includes the caller’s telephone number that is used for Reply purposes. The ability to answer a call at the subscriber level with different options based on a RNA or busy is dependent on the data sent by the telephone system.
- **Forwarded Calls, Internal—Integrated** - An internal caller is forwarded to the Subscriber mailbox on a RNA, Busy, or DND condition at the subscriber's primary extension device. This call type includes forwarded internal calls from the integrated telephone system and calls originating from other switch nodes or networked switches. If the telephone system sends conditional data such as RNA or busy then the caller is offered options based on the condition. Other integrated data includes the caller’s extension number that is used for Reply purposes. The ability to answer a call at the subscriber level with different options based on an RNA or busy is dependent on the data sent by the telephone system.

Configuring an Answer Mode Schedule

The Answer Mode tab is where you define how the Call Server answers each telephone line. You specify the announcements and menus that callers hear by assigning Call Processor mailboxes to line groups in the system. Each line group entry in the Answer Mode table tells the Call Server which mailbox to use when answering incoming calls on a particular day, date, or time. You can define as many entries in the Answer Mode table as your telephone system and messaging application require.

As you build the Answer Mode table, keep in mind that the Call Server applies table entries in the following order and according to the following rules of priority:

- Active overrides are always applied first by the system.

  NOTE You can designate a schedule as an override when you need to substitute a temporary announcement and call handling scheme for a selected number of lines. For example, you might use an override when the office is closed unexpectedly because of a winter storm. When you activate overrides, they take precedence over other table entries. They remain in effect until they are deactivated, at which time the normal answer mode scheme resumes.

- Entries for specific date, or day of week, or day of month are applied next.
- Entries for days of the week are applied last.

Within each of these groups, the Call Server searches for a valid entry with the highest priority and answers the call with the assigned mailbox. For example, when a call comes into a particular line group in the answer mode, a search the line group is searched for an override entry, a specific date, day of week, or a specific day of month entry, and finally an entry for the day of week. The caller is answered with the first entry it finds.

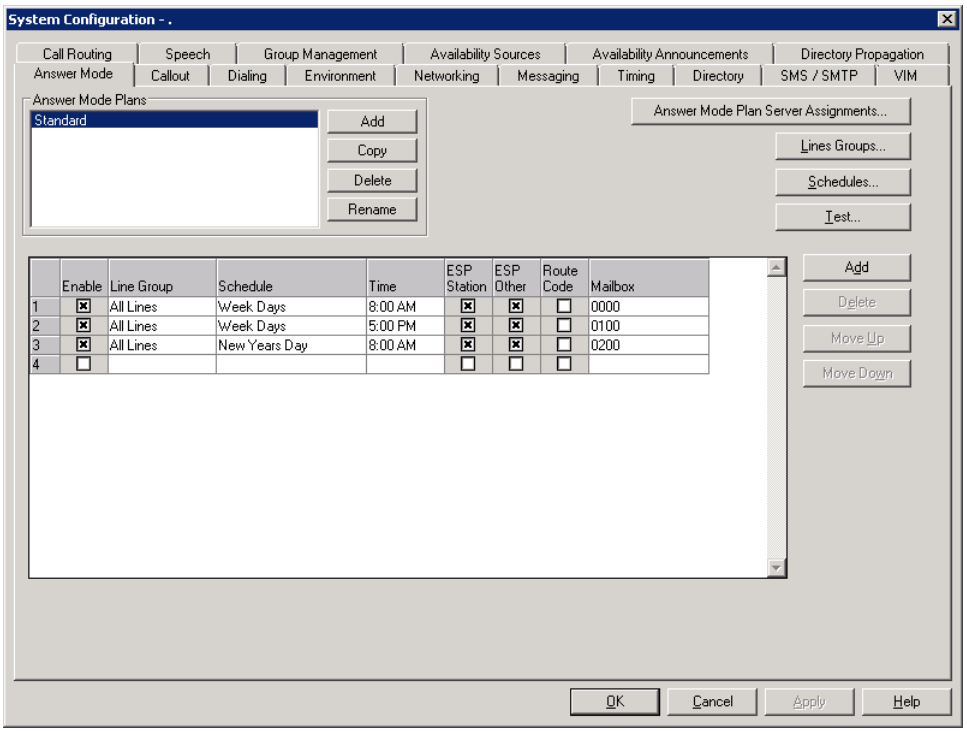
NOTE A standard answer mode schedule is created by default, when the database is first initialized.

Answer Mode schedules may be simple or complex depending on the needs of the organization. You can assign a single Answer Mode schedule for multiple call servers or assign multiple schedules for a single call server. Create an Answer Mode to handle the answering schedule requirements of every call server in the system. There are several steps to creating a new Answer Mode schedule. Once you create the various building blocks of the schedule, they can be modified or edited later. The order in which you create a schedule is as follows:

- **Answer Mode Plans** - Create an Answer Mode Plan to assign to a particular call server.
- **Answer Mode Plans Server Assignment** - Assign an Answer Mode Plan to a particular call server
- **Line Groups** -Create a Line Group for all lines or a specific group of lines on a particular call server.
- **Schedule** - Create a schedule for a specific date, day of week, or day of month
- **Add** - Add a new line to the answer mode schedule and enter the new information into the line criteria.
- **Test** - Test your new schedule to make sure it works the way you planned.

To create an Answer Mode schedule...

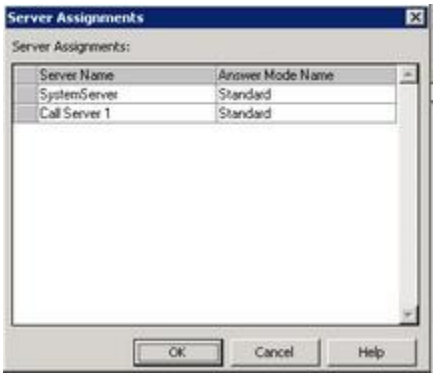
1. Start UM8700 Admin.
2. From the menu bar, click **Configuration**, and then **System**. The system configuration displays at the Answer Mode tab.



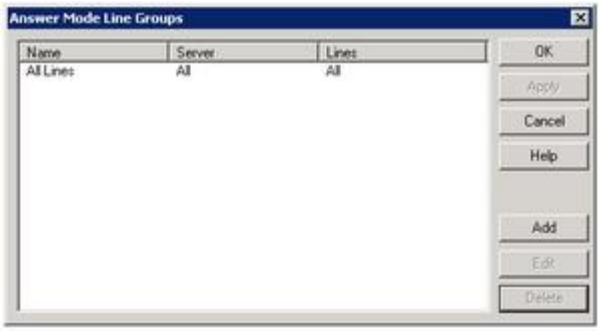
3. In the Answer Mode Plan area, click **Add**. The Add Answer Mode text box displays.

4. Type a name for the new Answer Mode Plan, click **OK,** and then click **Apply.**

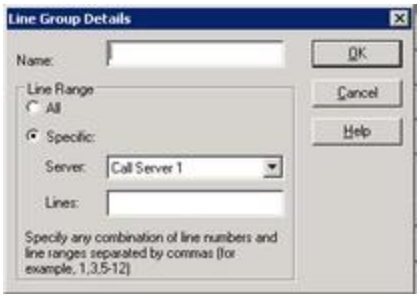
5. Click the **Answer Mode Plan Server Assignments** button. The Server Assignments dialog box displays.



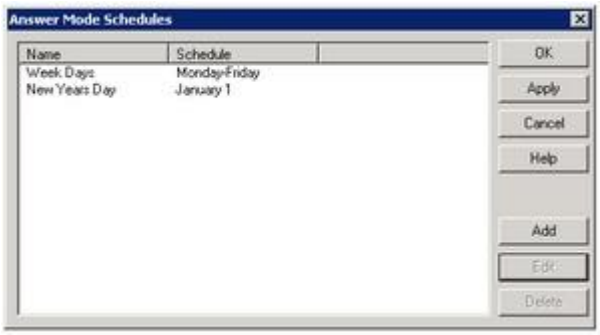
6. Click the drop-down box of the call server you want to assign the new Answer Mode Plan to, and then select the plan you want to assign.
7. Click **OK**, and then click **Apply**.
8. Click the **Lines Group** button. The Answer Mode Line Groups dialog box displays.



9. Click **Add**. The Line Group Details dialog box displays.



10. Type a name in the Name field, and then select the Line Range you want to assign, **All** or **Specific**. If you select Specific, continue to step 11. If you select All, skip to step 13.
11. Click the drop-down box, and then select the Call Server you want to assign.
12. Enter the Lines to use. Enter each line separated with a comma (1, 3, 5) or a range of lines separated with a dash (1-5).
13. Click **OK**, and then click **Apply**.
14. Click the **Schedules** button. The Answer Mode Schedules dialog box displays.

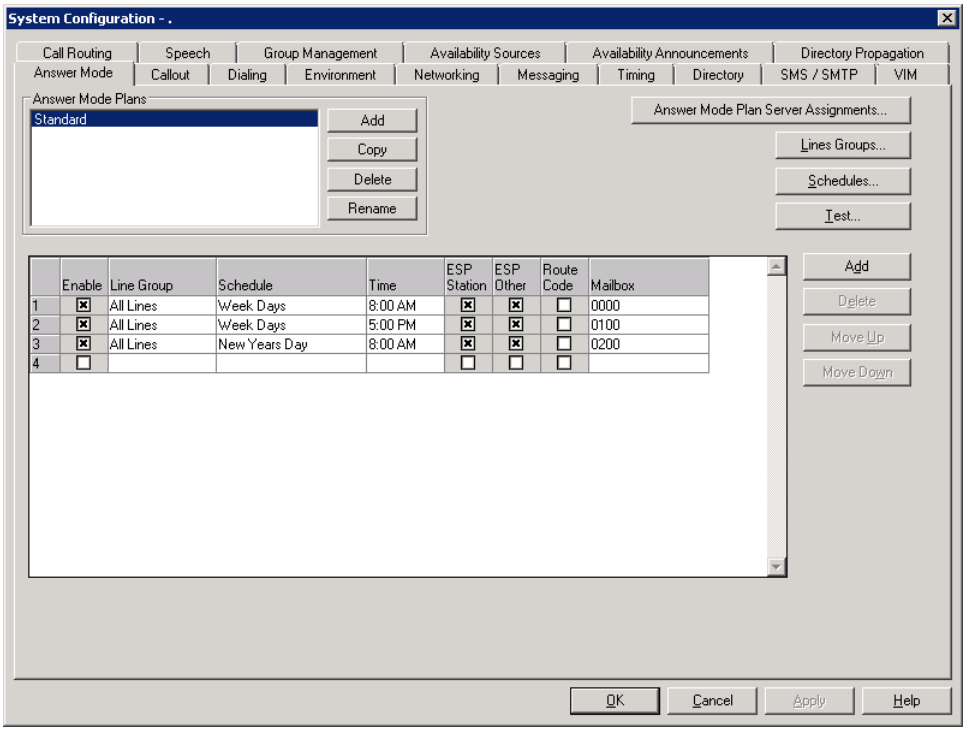


15. Click **Add**. The Schedule Detail dialog box displays.

16. Enter a Name for the Schedule, and then select Date, Day of Week, or Day of Month.
17. Enter the specific Date, Days of the Week, or Week/Day/Month criteria for the selection you choose.
18. Click **OK**, and then click **Apply**.

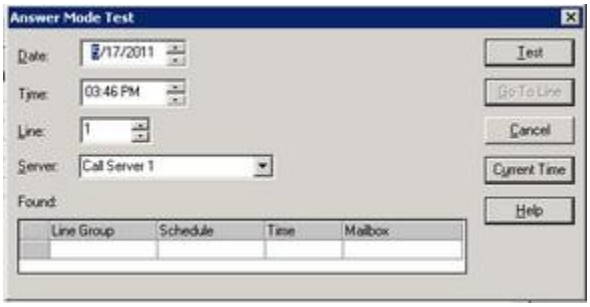
To add the schedule to the Answer Mode table...

1. Click **Add** next to the Answer Mode table. A new row is added to the table.



2. Click the drop-down box in the cell of the Line Group column, and then select the line group you want to add.
3. Click the drop-down box in the cell of the Schedule column, and then select the schedule you want to add.
4. In the cell of the Time column, enter the time the schedule becomes effective
5. Select whether ESP is accessible from this Line Group. ESP is enabled by default.
6. Select whether you want Route Codes to be accessible from this line group. The default is disabled.
7. Click **Browse** in the mailbox cell, and then select the Call Processor mailbox number to use for this schedule.
8. Click **Apply**.
9. Click the **Test** button. The Answer Mode Test dialog box displays.

10. Enter the specific criteria to test the new Answer Mode schedule, and then click **Test**. If the test of the new schedule is successful, the test results show the Answer Mode was found and the table is filled in with the resulting schedule.



11. Click **Cancel** to close the test dialog box.
12. In the Answer Mode table, click the **Enable** box of the new schedule to enable the new schedule, and then click **OK**.

To create an Override Schedule...

1. Start UM8700 Admin.
2. From the menu bar, click **Configuration**, and then **System**. The system configuration displays the Answer Mode tab.
3. Click **Add** next to the Answer Mode table. A new line is added to the table.
4. Click **Enable** to enable the override now.
5. Click the drop-down box of the cell in the Line Group column, and then select the **Line Group** to use the override.
6. Click the drop-down box of the cell in the Schedule column, and then select **Override**.
7. Click **Browse** in the mailbox column, and then select the Call Processor mailbox to answer the Line Group.
8. Click **Apply**. The Override is in effect.

To disable the Override...

1. Start UM8700 Admin.
2. From the menu bar, click **Configuration**, and then **System**. The system configuration displays the Answer Mode tab.
3. Click (uncheck) the **Enable** box of the Override schedule, and then click **Apply**. The Override is disabled.

Updating the Answer Mode Table

The Answer Mode schedule defines how and when each Call Server answers incoming calls. You might want to change the Answer Mode schedule when one of these situations occurs:

- The business hours change
- You want to add the holiday schedule for the year
- You can assign an unlimited number of answer mode entries—enough for day, night, weekend, and holiday modes for various lines or groups of lines.
- Mailboxes you plan to specify must exist before you modify the Answer Mode schedule.

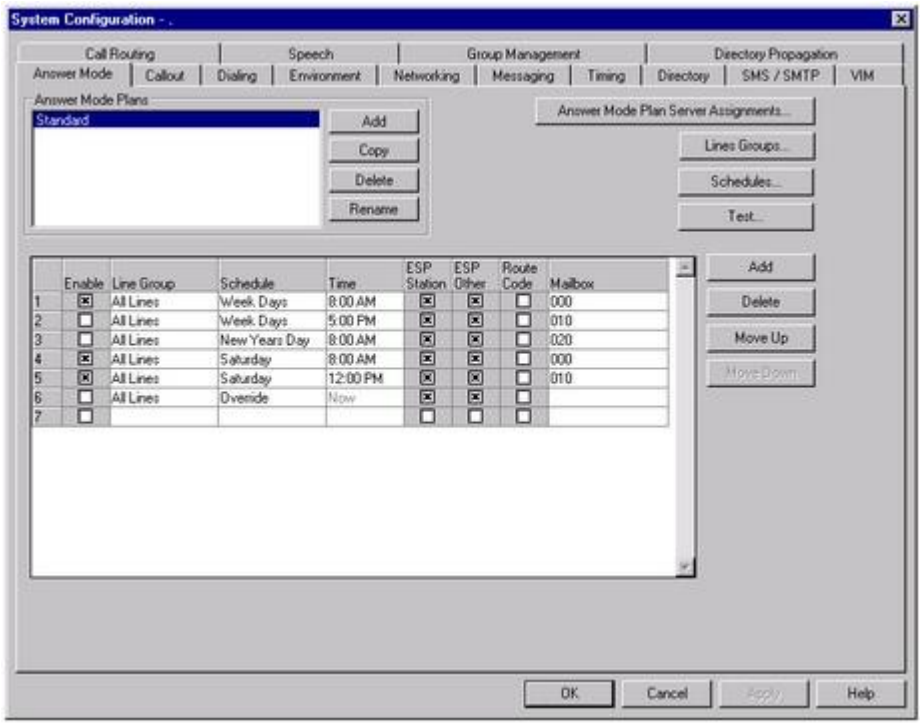
WARNING Do not change the system time to test answer mode entries. Not only does this not work as desired but messages may also be lost. To test an answer mode entry, use the Answer Mode test dialog box (which you can reach by clicking the Test button on the Answer Mode tab).

Sample Change in Business Hours

You can change the answer mode to reflect new business hours, whether the change concerns hours, or days of business. The answer mode can be customized to reflect the individual schedule of your business.

The following example of the Schedule Detail dialog box shows a starting schedule defined for Saturday. Answer Mode entries that invoke this starting schedule become effective every Saturday at the specified time and remain effective until another entry supersedes or overrides them.

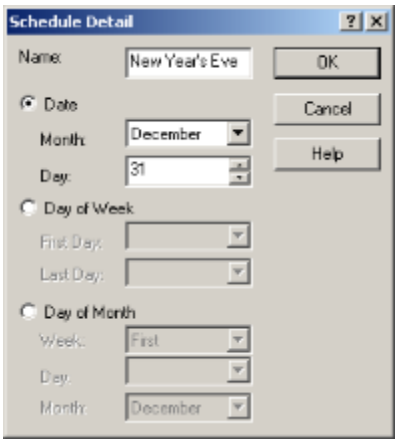
The following tab shows the Answer Mode schedule changed with the addition of settings for Saturday.



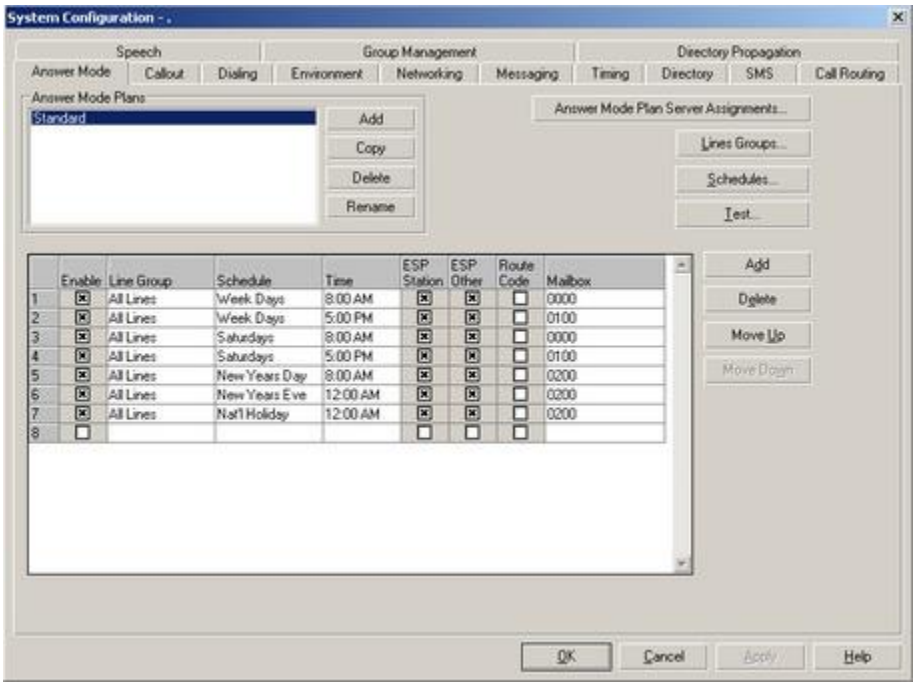
Sample Addition of Holidays

The UM8700 software makes it simple to add an Answer Mode entry for a specific date. Date entries supersede day-of-the-week entries and are in effect only for the day specified. This allows you to instruct UM8700 to answer in a specific way on a particular day. At midnight at the end of the defined day, UM8700 returns to the Answer Mode configuration that would normally be in effect at that point in the week, instead of leaving the configuration unchanged until the next answer mode entry is due to take effect.

The following example of the Schedule Detail dialog box shows a starting schedule defined for New Year's Eve (December 31). Note that date entries can be defined as specific calendar dates (such as this one) or as specific points in a month (such as the third Tuesday in September, for example).



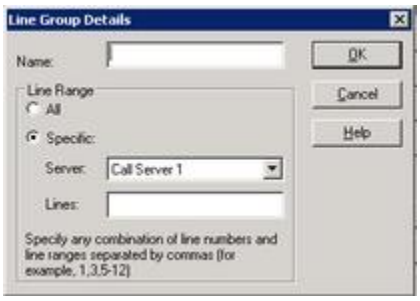
The following tab shows an Answer Mode table that uses the New Year's Eve starting schedule, as well as several other date-specific schedules.



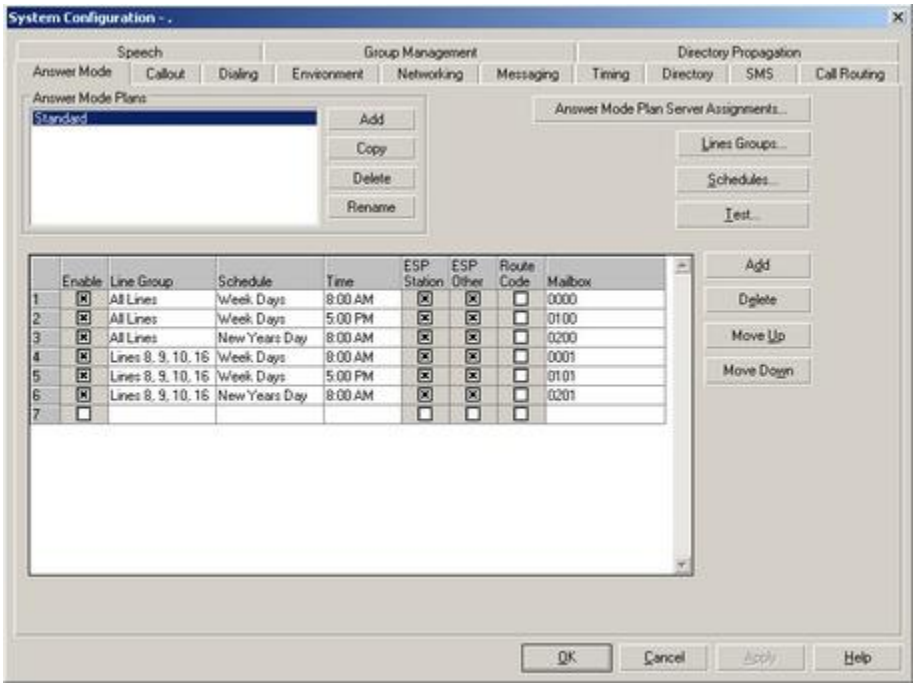
Sample Addition of Line Groups

IMPORTANT Do not define line groups, or create answer mode table entries for those groups, unless you are familiar with the integration between the Call Server and the telephone system. If you are not, consult with the administrator responsible for the integration before creating answer mode entries for specific lines.

If your organization needs to separate incoming calls by the lines on which they arrive at the Call Server, you can do so through the Answer Mode tab. The Line Group Details dialog box allows you to define a named group of lines that you can then associate with a separate set of answer mode entries. The following example of the Line Group Details dialog box shows a line group that consists of lines 8, 9, 10, and 16. Note that these lines can also be specified as a range plus an extra line, as shown in the example.



The following example shows an answer mode table that assigns separate Call Processors to the lines in the group. You could also use route codes to create the assignment.



IMPORTANT Use the Test button and dialog box to check the behavior of specific lines at various times of day and verify that the Call Server directs calls appropriately at all times.

Overriding the Answer Mode Schedule

The Answer Mode schedule defines how and when the Call Server responds to an incoming call. You might need to override the answer mode schedule when your company is:

- Temporarily changing its work hours (to close the building for a company-wide meeting or party, for example)
- Unexpectedly closed, such as during severe storms and natural disasters

Overrides do not contain date and time information like standard answer mode settings. When an override is set for one or more telephone lines, it takes effect immediately. The special/emergency Call Processor mailbox specified in the override answers the selected telephone lines, superseding all other date and time settings for those lines until the override is canceled. You can establish an unlimited number of overrides for special or emergency situations.

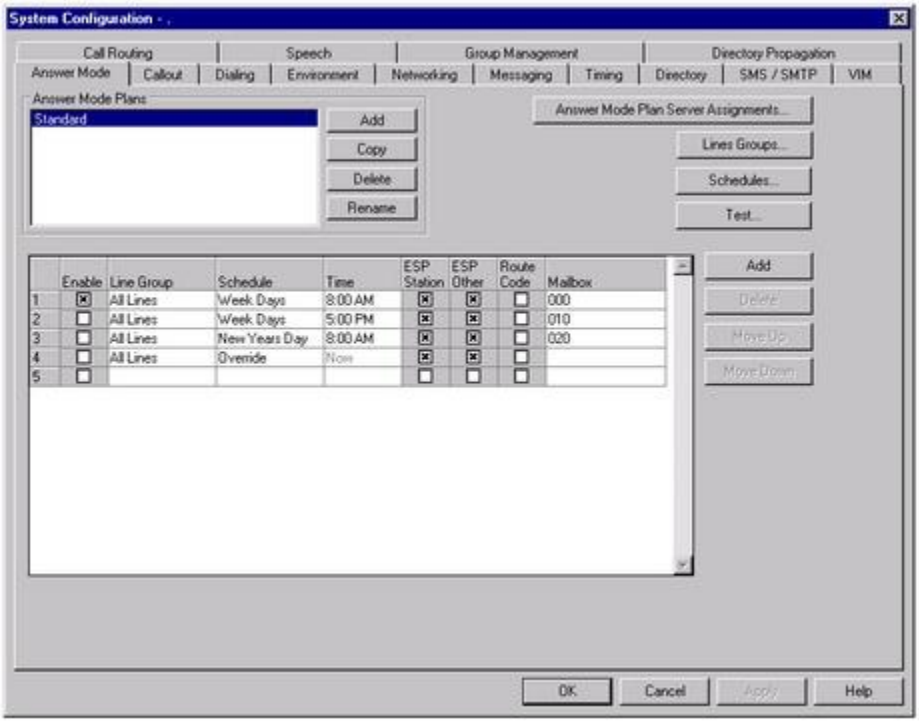
IMPORTANT The "special/emergency" Call Processor mailbox must exist before you can use it to override the answer mode schedule. Also, be sure to cancel overrides when they are no longer needed.

Use UM8700 Admin, locally or remotely, to set and cancel answer mode overrides.

To set an Answer Mode override...

1. Start UM8700 Admin and log on to the System Server.

2. From the menu bar select **Configuration**, and then select **System**.
3. On the Answer Mode tab, click the **Answer Mode Plan Server Assignments** button. The Server Assignments window displays.
4. Select the Call Server on which you want to override answer mode and click **OK**.
5. In the Answer Mode table, click the cell that represents the new override in the Line Group column. In this column, select the defined group of lines for the override.



NOTE If you want to create an override for a group of lines that is un-defined, click Line Groups, and then specify the lines to which this override should apply. For more information about the Line Groups button and dialog box, see Help.

6. If you want subscribers' extension specific call processing (ESP) settings to remain available while the override is in effect, select the boxes representing the override in the ESP Station and ESP Other columns.

If you want ESP to be available to …	*Then select …*
Direct or forwarded calls from other extensions	ESP Station
Direct or forwarded calls from operators or outside trunks	ESP Other

7. If you want the Call Server to continue applying route codes to incoming calls and routing them to different mailboxes by call type, select the box representing the override in the Route Code column.
8. Click the cell representing the override in the Mailbox column, and then click **Browse** to select the mailbox where you want calls on the selected lines routed when the override is in effect.

IMPORTANT Create a special or emergency situation Call Processor mailbox to assign as an override in advance, so that you are prepared if the need arises. If the Route Code box for an override is selected, you must make sure not only that the mailbox exists, but also that similar mailboxes exist for all active route codes. For more information about setting up mailboxes to work with route codes, see Help.

9. To activate the override, select **Enable**.
10. To set additional overrides for other telephone lines, repeat steps 3 through 8.
11. When you are finished specifying overrides, click **Apply** or **OK**.

To cancel an Answer Mode override...

1. Start UM8700 Admin and log on to the System Server.
2. From the menu bar select **Configuration**, and then select **System**.
3. Click the **Answer Mode Plan Server Assignments** button. The Server Assignments window displays.
4. Select the Call Server on which you want to override answer mode, and then click **OK**.
5. In the Answer Mode table, clear the **Enable** box next to the override setting.
6. If you want to remove the override, click the numbered cell next to the override to highlight its entire line, and then click **Delete**.

Working with Route Codes

Route codes are used to steer calls to specific Call Processor mailboxes based on numeric information sent to a Call Server by the telephone system or the Public Switched Telephone Network (PSTN) when the call is first received. This integrated information is sent to the Call Server through DTMF tones or data packets while call ringing is taking place at the linecard level.

An incoming trunk number, a DNIS (Directory Number Identification Service) number, or a phantom extension number is used to direct calls to specific Call Processor mailboxes through route codes. Configure Route codes on the Call Routing tab of UM8700 Admin's System Configuration tabs, and then enable them on the Answer Mode tab.

- **Trunk Numbers** - Incoming lines or trunks are typically assigned numbers to identify them by line or by line (trunk) group. Depending on the telephone system's capabilities, these numbers may be sent as packet information to the equipment answering the call for call routing purposes.
- **DNIS** - The Directory Number Identification Service (DNIS) is a service provided by telecom companies. This service typically sends the number dialed by the caller to the answering equipment. For example, if your company sells a variety of widgets and you advertise each widget with a different toll free number, the DNIS information would enable UM8700 to answer each call with the correct announcement and provide the caller with the appropriate application to purchase the specific widget.
- **Phantom Extensions** - Phantom extensions or groups can be programmed in many telephone systems and provide a means to direct calls to specific places without consuming switching resources or physical hardware. When a caller dials a phantom extension number assigned to UM8700, the call is forwarded to the pilot number of the UM8700 hunt group immediately. Route codes are triggered by the call forwarding information in order to send the caller to the appropriate Call Processor mailbox.

When you assign a route code, the code you enter is added arithmetically to the Call Processor mailbox number that is assigned in the Answer Mode configuration. The Call Processor mailbox number that answers a call for a particular route code is the combined value of the route code number and the mailbox number of the Call Processor active in the Answer Mode at the time of the call.

Every route code and answer mode Call Processor combination must have a matching Call Processor. For example, phantom extension 4500 is assigned the route code of 62. When extension 4500 is dialed and the active Answer Mode Call Processor is the Day Main Call Processor mailbox 000, the route code 62 is added to mailbox number 000 and Call Processor mailbox 062 answers the call. When extension 4500 is dialed, the same route code 62 is assigned during the nighttime hours, and the Night Main Call Processor mailbox for after business hours is mailbox 010, Call Processor mailbox 072 answers the call.

If you are using route codes, you must create enough Call Processor mailboxes to support calls during all hours in which the Answer Mode is configured. This involves listing the answer mode entries and overrides whose Route Code boxes are selected, adding the value of each route code to each answer mode entry and override on your list, and creating Call Processors for each of the resulting mailbox numbers.

To program a route code…

1. Click the **Call Routing** tab.

2. Enter the number to be sent to UM8700.
3. In the Service Type field click the drop-down box, and then select the service type to use for this route code. Select Phantom Extension, DNIS, or Trunk.
4. Enter a route code number to associate with the incoming number.
5. Select whether to allow Subscriber logon from the route code Call Processor mailbox.
6. Enter a comment to describe what the route code does in the application.
7. Click **OK**.

Once you have entered a route code for each incoming number used in the application and have created a Call Processor mailbox that supports the route code for each entry in the Answer Mode Configuration, open the Answer Mode tab and enable Route Codes.

To enable Route Codes…

1. Click the Answer Mode tab.
2. Select the Route Code box for each Answer Mode entry for which you want to enable Route Codes.
3. Click **OK**.

Supporting the System: Some Basic Procedures

This chapter provides instructions for the basic procedures used to support UM8700; however, it does not cover all the procedures that may be needed. For instructions that are not provided here, refer to the online help system.

- Exporting and importing mailbox configuration information
- Backing up and Restoring Mailboxes
- Starting UM8700 Configuration
- Starting up and shutting down UM8700
- Configuring the Online Backup Location
- Restoring the system from a backup
- Starting the Line Status utility
- Changing Line Status
- Checking system activity
- Installing anti-virus software
- Resetting the system time
- Shutting down the operating system

Exporting and Importing Mailbox Configuration Information

Using UM8700 Admin's Mailbox Import and Mailbox Export utility, you can export the information from existing mailboxes on the System Server to a text file in comma-separated-values (.csv) format. You can then use the text file in one of the following ways:

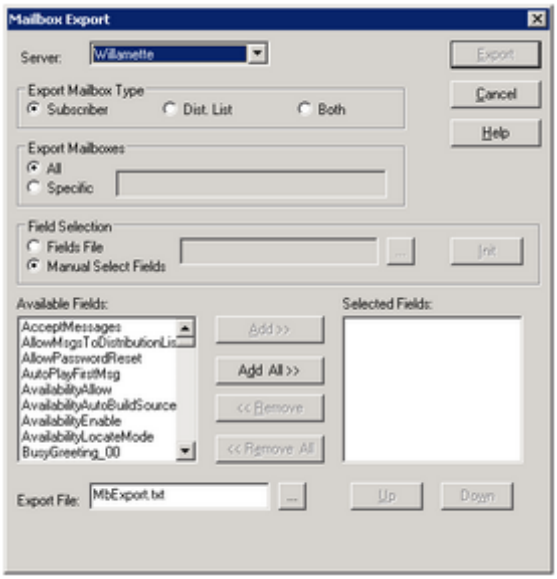
- Import it to a different System Server to create copies of the mailboxes there.
- Edit it to include configuration changes and re-import it. Alternately, you can create a .csv file in a text editor or other program and import it to create or reconfigure mailboxes on the System Server. This file is referred to later as a *Fields* file.

The following procedures explain how to use .csv files to export and import mailbox information.

IMPORTANT Do **not** create a mailbox import file by hand without familiarizing yourself with the online help topic "Working with the Mailbox Import file." This topic contains current information about the structure the System Server requires the file to have, the data fields it can contain, and the data formats and dependencies of those fields. *The System Server may not import the contents of a file that does not meet these requirements, or it may import only parts of the file.*

To export mailbox information from a System Server to a .csv file...

1. Start UM8700 Admin.
2. From the menu bar, select **Mailbox**, and then click **Export**. The Mailbox Export dialog box displays.



3. In the Export Mailbox Type option group, select the type of mailboxes you want to export.

If you want to export...	*Then select...*
Subscriber mailboxes only	Subscriber
Distribution List mailboxes only	Dist List
Both types of mailboxes	Both

4. In the Export Mailboxes option group, select whether to export all mailboxes (**All**) or only the mailboxes you specify (**Specific**).
5. If you selected Specific in the previous step, type the numbers of the mailboxes you want to export in the adjacent text box. Type a list of individual mailbox numbers to export, separated by commas (1001, 2005, 3007), one or more ranges of mailboxes (5000-5049, 5075-6005), or a combination of such specifications.
6. In the Field Selection option group, select whether to export fields you choose in the Mailbox Export dialog box (**Manual Select Fields**) or the same fields that are specified in an existing mailbox import file (**Fields File**).

If you selected...	**Perform...**	**And...**
Manual Select Fields	Steps 8-10	Continue with Step 11
Fields File	Step 7	Skip to Step 11

7. In the text box adjacent to the Fields File option, type the path and filename of the file, that specifies the appropriate group of fields. If necessary, click **Browse,** and then use the Mailbox Export—Input File Selection dialog box to locate the file.
8. In the Available Fields box, select as many fields as you want to include in the exported file. When you are finished, click **Add**. Alternately, to add all of the fields click **Add All**.

> **NOTE** When you select a field in the Available Fields box, it remains selected until you click it again.

9. If you want to remove a field from the Selected Fields box, select the field name and click **Remove**. Alternately, double-click the field name. To remove all fields in the Selected Fields box, click **Remove All**.
10. To change the order in which the fields appear in the newly exported file, select an individual field and click the **Up** and **Down** buttons to move that field within the order. Repeat this step for any other fields you want to move.
11. In the Export File box, type the path and filename of the file you are exporting. Alternatively, click **Browse**, and then use the Mailbox Export—Export File Selection dialog box to specify the location and name of the file you want to use.

> **NOTE** Use a filename ending in .csv or .txt.

12. Click **Export**, and then click **OK**.

To import mailbox information from a .csv file to a System Server...

1. Create a mailbox import file, either by composing one manually or by using the Mailbox Export command.
2. Start UM8700 Admin.
3. From the menu bar select **Mailbox**, and then select **Import**.
4. In the Import File text box, type the path and filename of the mailbox import file. Alternately, click Browse, and then use the Mailbox Import Input File Selection dialog box to specify the appropriate path and filename.
5. In the Output File text box, type the path and filename of the mailbox import output file. Alternately, click Browse, and then use the Mailbox Import Output File Selection dialog box to specify the appropriate path and filename.
6. Click **Init** to load the mailbox import file into memory. The file's header row displays in the Import Fields box and the Import Contents box displays the remaining rows in the file. When this step is complete, an Import button replaces the Init button.
7. If the Action box displays, select the method you want to use in applying the entries of the mailbox import file.

If you want the System Server to...	*Then click...*
Add the mailboxes specified in the file, and then configure them with the specified information.	**Add**
Delete the mailboxes specified in the file.	**Delete**
Apply the information in the file to the existing mailboxes specified there.	**Change**

8. Click **Import**.

   Mailboxes are updated according to the information in the Mailbox Import file. If there are errors in this file, they are displayed in the Import Errors box that replaces the Import Contents box. After you have examined these errors and made any notes required, you can exit the Mailbox Import dialog box by clicking **OK**.

Working with the Mailbox Archive Utility

The Mailbox Archive utility in the Desktop program folder allows you to back up and restore any or all mailboxes and their associated recordings, messages and mailbox dependencies. You can also include administrator accounts in the backup.

NOTE Mailbox Archive is a System Server application; it does not run on a Call Server.

Use Mailbox Archive:

When Backing up

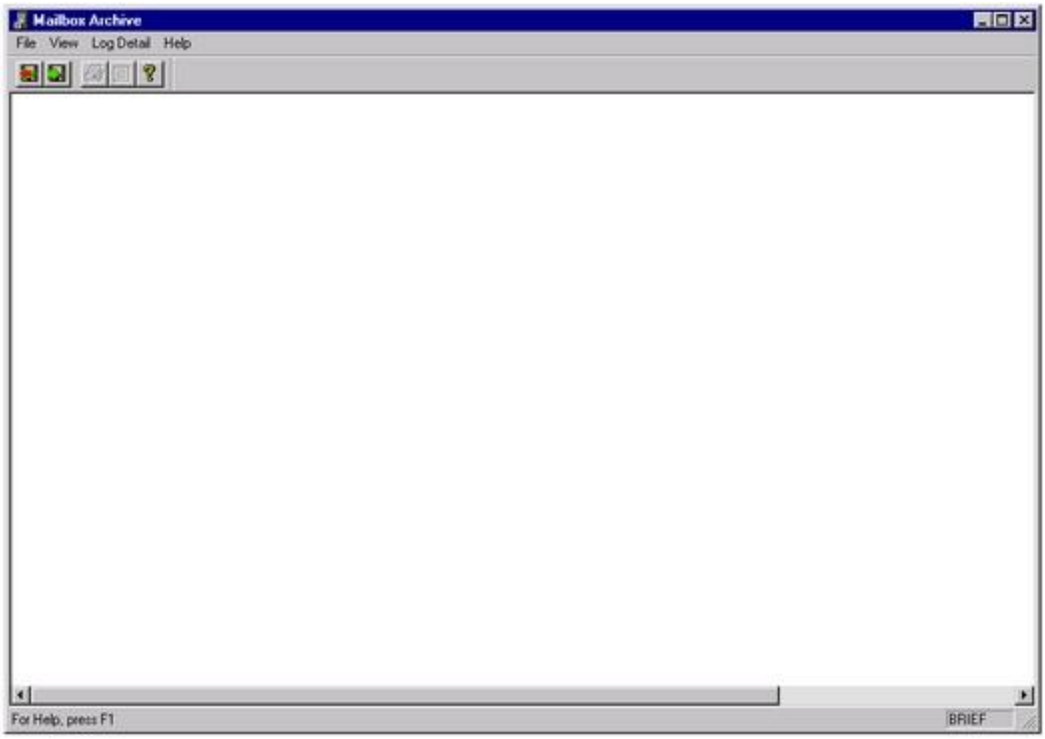
- Back up the mailboxes in the system. The associated mailbox recordings of mailboxes (announcements, personal greetings, and recorded names) are automatically backed up whenever the mailbox is backed up
- Back up voice and fax messages contained in the mailboxes chosen for backup
- Enforce dependencies in backups; automatically back up mailboxes that have some relationship to mailboxes explicitly chosen for backup
- Back up administrator accounts

When Restoring

- Restore mailboxes
- Restore mailbox recordings or preserve existing recordings of mailboxes
- Restore voice and fax messages associated with the mailboxes chosen for restore
- Enforce dependencies in restores. Automatically restore mailboxes that are referenced by the mailboxes explicitly chosen for restore
- Restore administrator accounts

To start Archive...

1. Select **Start | Programs | UM8700 Desktop | Archive**. The Mailbox Archive utility displays.



2. Click the button or select the command that corresponds to the next action you want to perform.

If you want to...	*From the Menu bar Select...*	*or click...*
Back up	File | Backup	The Backup button
Restore	File | Restore	The Restore button
Print the archive log	File | Print	The Print button
Print Preview	File | Print Preview	
Print Setup	File | Print Setup	
View Log Detail	Log Detail, or View | Log Detail and then select: Brief Standard, or Verbose	
Save the archive log	Select File | Save Log	The Log button

Determine the version of Mailbox Archive	Select File | Help | About Mailbox Archive	The About button

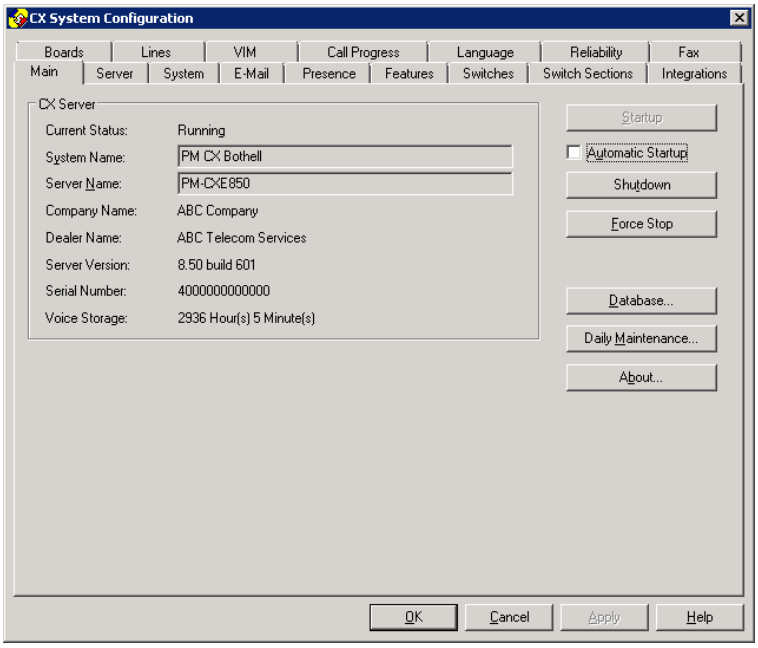
For more information the Mailbox Archive Utility, refer to the related help topics or the online book, *The Mailbox Archive utility*.

Working with UM8700 Configuration

UM8700 Configuration provides access and control of the Telephony Server's fundamental configuration settings: switch setup, integration, and database management. This utility also lets you shut down and start up the call handling services. The utility must be run locally at the Telephony Server.

To Start UM8700 Configuration...

- Select **Start** | **Control Panel** | **UM8700 Configuration**. The utility opens with the Main tab displayed.



Starting UM8700

When you initially install the UM8700 software, you must start the UM8700 software manually. You also need to start UM8700 after performing a procedure that has required you to shut it down. The System Server and each Call Server are started in the same manner form the Main tab of UM8700 Configuration.

To start the Telephony Server...

1. Start UM8700 Configuration.
2. On the Main tab, click **Startup**.

Shutting Down the Telephony Server

Some installation and maintenance procedures require that you shut down the System Server or Call Server first. In most situations, the server prompts you, allowing you to continue that procedure or cancel it.

If you plan to shut down the operating system as well, NEC recommends that you shut down the UM8700 processes before you shut down the operating system.

IMPORTANT Do **not** use the hardware reset button on the server platform at any time. Also, do **not** just power off the server platform. Shut down the UM8700 software processes, and then the operating system. Allow the operating system to power off the system. If you do not properly shut down both, you can lose important data.

To shut down the Telephony Server...

1. Start the Configuration utility.
2. On the Main tab, click **Shutdown**.

While shutting down, a Call Server warns callers still on the line with the prompt, *"The system is shutting down; please hang up now."* The Call Server shuts down all inactive lines. If a line is active, for example, an outside caller is leaving a message the server waits for the line to become inactive before closing it.

NOTE Use the Line Status utility to observe the lines if necessary. If a line remains active, you can force the line closed by clicking Force Stop. However, forcing a line to close may disconnect an outside caller or subscriber before they have completed the purpose of their call.

Configuring an Online Backup Location

UM8700 copies the system backup file it created during the Daily Maintenance routine automatically to an online location, as well as local store messages, name recordings, greeting recordings, announcements, and report data. You can configure UM8700 to copy the daily backup files to a local drive, a network location, or an external USB drive. UM8700 manages the retention time of the Online Backup Location files based on its server time.

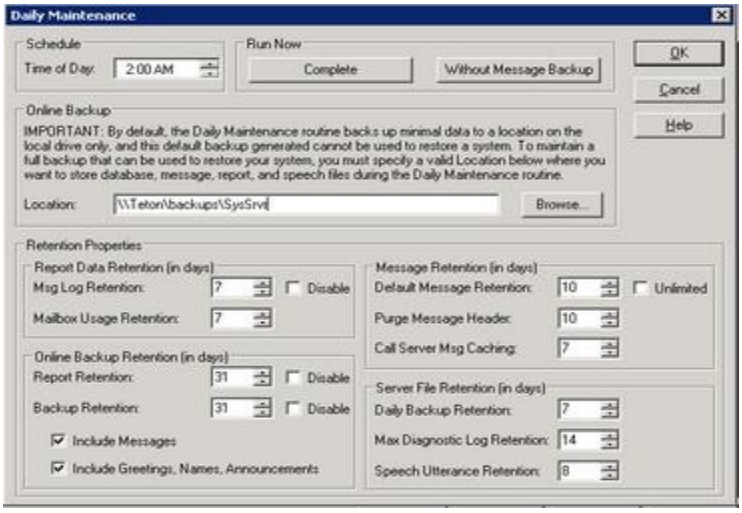
IMPORTANT You must configure the UM8700 File Manager Service with an administrator-level log on and password to allow UM8700 the right to copy the backup to the Online Backup Location. See the help topic, "Configuring Services in a Multi-Server Environment" for more information on how to configure the required Services.

To configure an Online Location for backup storage...

1. Start UM8700 Configuration.
2. On the Main tab, click the **Daily Maintenance** button. The Daily Maintenance dialog box displays.
3. In the Online Backup Location field type a drive letter and path name, a UNC path name, or click the **Browse** button to select a location from the list.

NOTE Drive letters are valid for local drives only. The UM8700 online backup does not support mapped network drives.

IMPORTANT By default, the Daily Maintenance routine backs up minimal data on the local drive only and this default backup generated cannot be used to restore a system. To maintain a full backup that can be used to restore your system, you must specify a valid location where you want to store database, message, report, and speech files during the Daily Maintenance routine. To maximize recovery options in the event of a system failure, it is recommended that you select a different server on the network as the online backup location.



4. Click **OK**. Three directories are created in the Online Backup Location directory. In addition, subdirectories are created within these directories. Each subdirectory is used to store a particular backup set of files. They are:
   - <online_location>**Backup**
   - <online_location>**Reports**
   - <online_location>**Speech**

Recovering a Database

The Recover Database function allows you to restore your system database back to proper operation from a previous online backup created during the Daily Maintenance routine. You perform a database recovery from the Database dialog box of the Main tab in UM8700 Configuration. UM8700 must be shutdown to recover the database.

In the event of a complete system failure, it may be necessary to re-install the UM8700 software prior to recovery. Follow the normal installation steps to re-install the software. Refer to the *Install Guide*, the *Administrator Guide*, and the online help system for more information on installing UM8700 software. Once the software is installed completely, you can initialize the database with a previous online backup <file>.zip.

IMPORTANT The Online Backup Location must be configured in order for the WAV files and report data to be available during the restore process. Otherwise, the WAV files and report data must be copied manually to the new server from the source server.

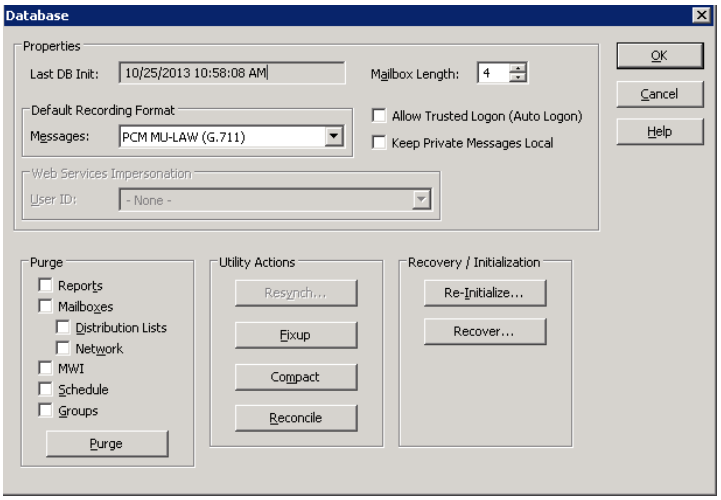
NOTE Unless otherwise stated, the images and steps below are for a System Server but in most cases apply to both the System Server and the Call Server. When the differences are important, additional images and steps specific to a Call Server are also provided.

WARNING The following procedure attempts to recover the database and restore the System Server in a like-new condition with a previously stored database. The recovery process uses an existing backup <file>.zip file to perform the recovery. Any changes to the database that occurred between the time of the backup and the recovery are lost in the process. Exercise caution when performing this procedure.

NOTE UM8700 software must be installed completely before you begin this procedure.

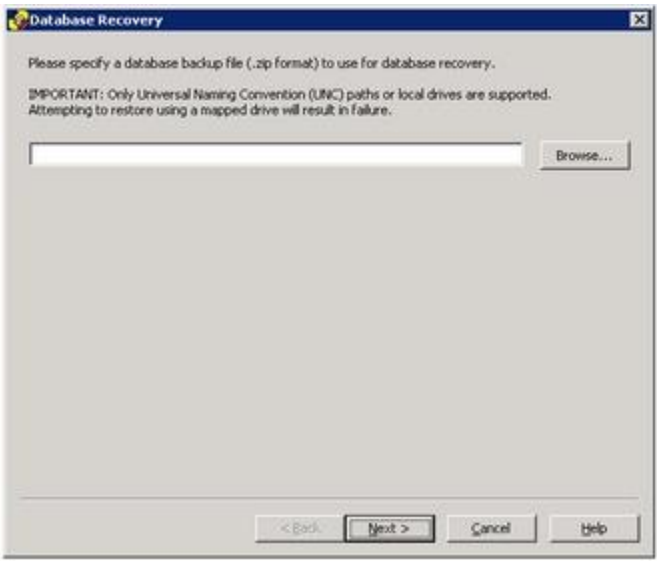
To recover the database using a system recovery backup <file>.zip...

1. **Shut down** the Telephony Server, and then on the Main tab, click the **Database** button. The Database dialog box displays.



2. Click the **Recover** button. The Telephony Server Configuration text box displays. Click **OK** to continue.

3. The Database Recovery Server Information dialog box displays.

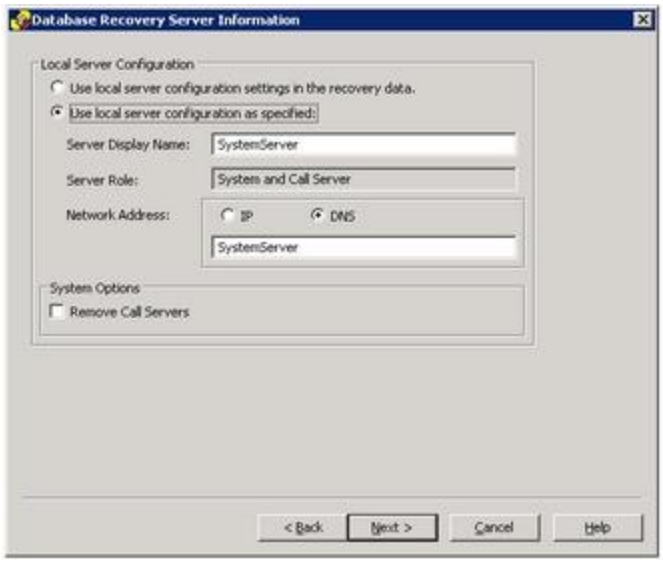


4. Enter the UNC path, the local drive, or click **Browse** to select the backup from the Online Backup Location. The Select Backup Zip File dialog box displays if you click Browse.

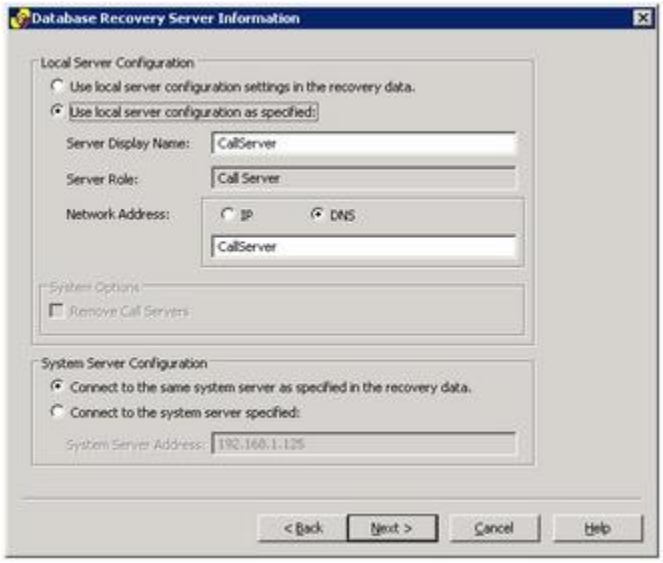
> **NOTE** This dialog box only supports the Universal Naming Convention (UNC) paths or a local drives; attempting to use a mapped drive may result in failure.

5. Select the zip file you want to use for the recovery process, and then click **Open**. The selected path and location are filled in the Database Recovery dialog box.
6. Click **Next** to continue. One of the following Database Recovery Server Information dialog boxes displays, depending on whether the server is a System Server or a Call Server.

System Server Database Recovery Server Information



Call Server Database Recovery Server Information



- **On a System Server** - From the Database Recovery Server Information dialog box make the following selections:

If you select…	Then...
Local Server Configuration	
Use local server configuration settings in the recovery data	The existing configuration in the backup data to configure the local server settings is used. (Typically used if the backup was created on the same server to which it is being restored)
Use local server configuration as specified	Enter the server display name and the network address. If you select IP, enter a TCP/IP address. If you select DNS, enter a DNS name.

System Options

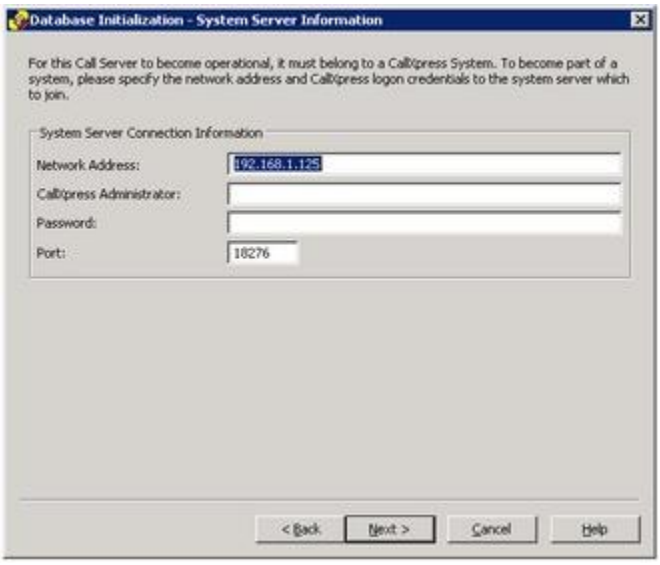
Remove Call Servers	Select to remove any Call Servers configured in the recovery data. Selecting this option breaks communication between any existing Call Servers and the newly restored System Server.

- **On a Call Server** - From the Database Recovery Server Information dialog box make the following selections:

If you select…	Then...
Local Server Configuration	
Use local server configuration settings in the recovery data	The existing configuration in the backup data to configure the local server settings is used. (Typically used if the backup was created on the same server to which it is being restored)
Use local server configuration as specified	Enter the server display name and the network address. If you select IP, enter a TCP/IP address. If you select DNS, enter a DNS name.
System Server Configuration	
Connect to the same System Server as specified in the recovery data	Use the existing System Server network address in the backup data.
Connect to the System Server specified	Enter the network address of the server. **NOTE** This option is typically selected only in cases when the restored System Server has a different network address than the local server settings configuration in the backup data.

7. Click **Next** to continue. If this is a System Server, skip to the step 10.

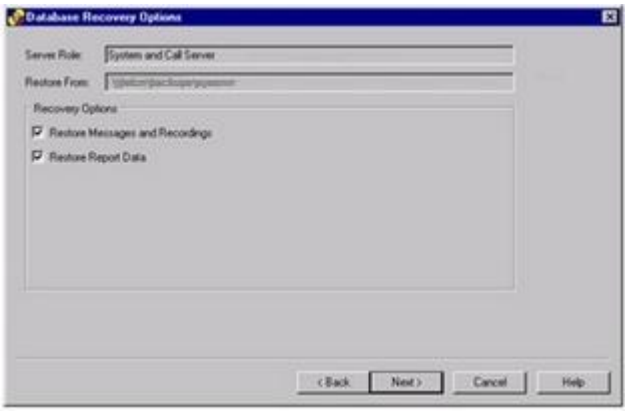
NOTE The Call Server attempts to log on to the System Server using the credentials in the backup. If it cannot log on, the Call Server–The Database Initialization–System Server Information dialog box displays.



Enter the System Server Connection Information

- In the Network Address field, enter the network address. If you select IP, enter a TCP/IP address. If you select DNS, enter a DNS name.
- In the UM8700 Admin field enter the UM8700 administrator's ID
- In the Password field, enter the UM8700 administrator's password

8. Click **Next**. The Database Recovery Options dialog box displays.



9. From the Database Recovery Options dialog box, select **Restore Messages and Recordings** if you want to include them in the recovery process. Select **Restore Report Data** if you want to include the report data in the recovery process.

IMPORTANT If you want to restore messages and recordings and report data the Online Backup Location must be used. Otherwise, the WAV files and report data must be copied manually to the server. The restore options are unavailable if the Online Backup Location is not used.

10. Click **Next**. The Database Recovery Confirmation dialog box displays.
11. Click **Finish** to start the recovery process.

    Important Considerations:

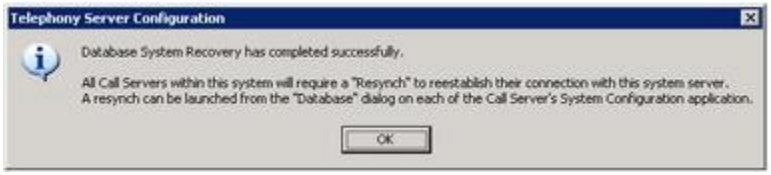
    - If you are restoring from a directory other than the Online Backup Location , the recovery options are grayed out
    - If you are restoring a System Server from an Online Backup location, it is highly recommended that you select both options, particularly if it is a new install of UM8700 software.

12. On a System Server:

    - Once the Recovery process completes the Administrators dialog box displays and lists the current available administrators. Click **OK** to continue.

    - The Telephony Server Configuration dialog box displays. Click **OK**. The database is validated, Services are restarted, and UM8700 Configuration opens,. The recovery process is complete.

IMPORTANT It is essential to re-synchronize each Call Server in the system to this recovered System Server before proper system operation can resume. See the help topic, "Re-synchronizing a Call Server." for instructions on how to re-synchronize a Call Server. If the recovered System Server has a different network address then it had prior to the recovery (at the time of its backup), the Re-synch Call Servers function does not work. Instead, you must add each Call Server to the System Server.



System Server Configuration Completion dialog box

- On a Call Server
- The server displays a text box indicating it is re-synching with the System Server followed by a dialog box indicating it is added to the system. Click **OK**. The Telephony Server Configuration dialog box displays to confirm completion of a successful Database System Recovery.

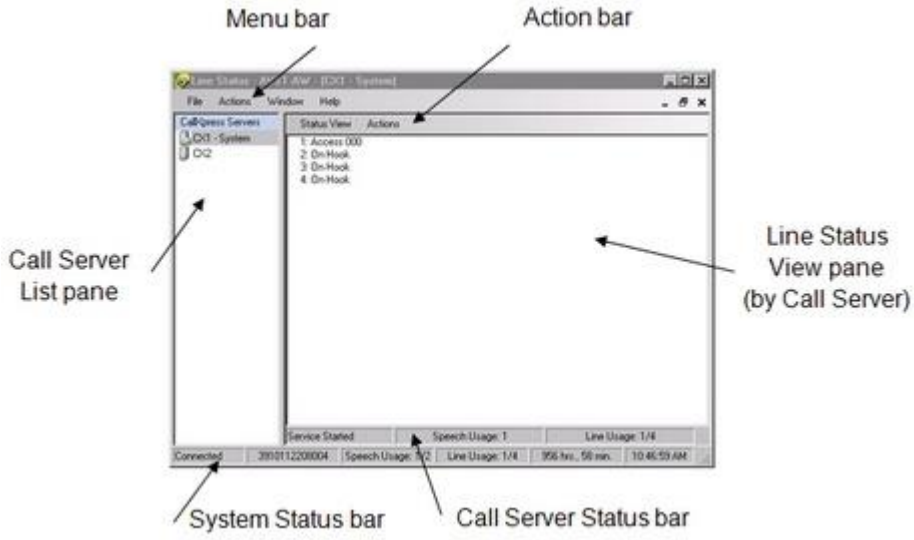
Call Server Configuration Completion dialog box

- Click **OK**. The database is validated, Services are restarted, and UM8700 Configuration displays. The recovery process is complete

13. Click **OK**.

Working with the Line Status utility

The Line Status utility provides status information of the Call Server's telephony ports for each Call Server in the system. This utility runs from the Call Server or System Server platform only, it is not a client utility. Line Status can run from each individual Call Server or the Line Status of all Call Servers can be viewed from the System Server.



To Start the Line Status Utility...

1. Select **Start** | **All Programs** | **UM8700 Desktop** | **Line Status**.
2. Enter the **Server Name**, the administrator's **User ID**, and the **Password** in the Line Status Login dialog box, and then click **OK**.

3. The Line Status utility window displays.
4. Double-click the name of the Call Server you want to view.
5. The Line Status of the Call Server displays.

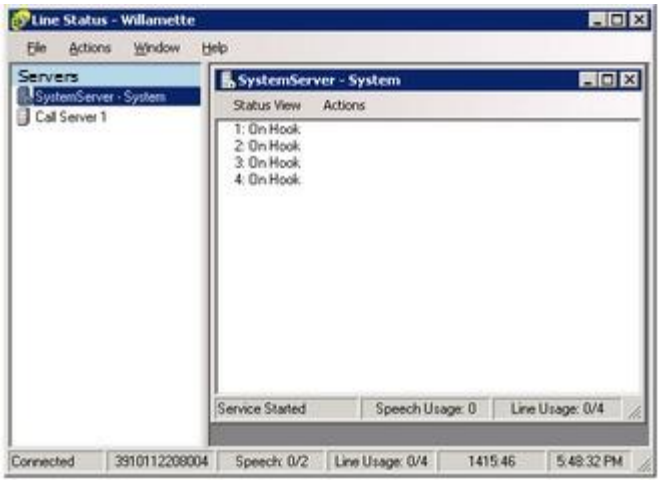
Checking System Activity

Periodically, you might want to check the activity of the Call Server to make sure it is answering calls properly. Use the Line Status utility to:

- Display activity of lines
- Display the Status Information dialog box, which shows activity of lines and server processes.

The bottom of the Line Status window features a status bar that displays the following information about the Call Server:

- Its operating status (Starting, Running, Stopping, or Stopped)
- Its serial number
- The estimated total amount of voice storage, in hours and minutes, that the current amount of disk space supports
- The current system time



You can reach the application menu for the Line Status utility by right clicking anywhere on the Line Status title bar. The menu displays the following options:

- **Show Line Status** - Displays the operating status of all lines; this is the default option.
- **Show Debug Info** - On some outband integrations, troubleshooting information that may be useful to Customer Support displays.
- **Show Process IDs** - Displays the ID number that the operating system has assigned to the copy of the AT_Phone process currently executing on the line. You can use this ID number within the Windows Task Manager to help troubleshoot problems with specific lines. (This information is displayed only for active ports.)
- **Show Extensions** - Displays the telephone number associated with the line on the Voice Lines Configuration tab of the Hardware Configuration property sheet in UM8700 Admin.
- **Show Call Durations** - Displays three state durations per line in the format X:MMM:SS, where MMM represents the minutes and SS represents the seconds. X represents one of the following status indicators:
- **S** indicates that the line has been in the state displayed on the Line Status display or the indicated amount of time.

- **C** indicates that the line has been active for the indicated amount of time.
- **L** indicates that the line has been Open, Closed, or Out of Service for the indicated amount of time.
- **About Telephony Server, Line Status** - Displays the version number and specific revision of UM8700 software, as well as related copyright information.

As each call progresses, the Line Status utility and the Status Information dialog box in UM8700 Admin display a sequence of messages to indicate what is happening at the port that the call is using. The following table lists the messages that the utilities can display for each line port.

Status	***The line is...***
Access XXXX	In use by a Call Processor or subscriber mailbox numbered XXXX
AMIS in XXXX	Communicating with an AMIS-compliant node that called in; XXXX is the local AMIS mailbox
AMIS out XXXX	Communicating with an AMIS-compliant node called by local AMIS mailbox XXXX
Call Mgr XXXX	In use by subscriber mailbox XXXX using Desktop Call Manager (existing Desktop Call Manager systems
CallOut	Beginning a network callout; it has not logged on to the remote system yet
Closed	Closed from the Status Information dialog box in UM8700 Admin
CM Xfer XXXX	Transferring a call to a subscriber who is currently logged on to Desktop Call Manager (existing Desktop
Dir	In use by a caller accessing the automated attendant directory
Down	Down (displayed during shutdown)
Incoming	Receiving a call
LiveRec XXXX	Recording a telephone conversation by a subscriber using the Live Record feature; XXXX is the subscriber
LiveRec Paused	In use by a subscriber who is using the Live Record feature to record a telephone conversation but has
Logon XXXX	In use by a subscriber who is currently logging on to subscriber mailbox XXXX
Msg XXXX	In use by a caller leaving a message for subscriber XXXX from a message center
MWI+ XXXX	Transmitting a command sequence to the telephone system to set the message-waiting indicator (MWI)

Status	***The line is...***
MWI- XXXX	Transmitting a command sequence to the telephone system to clear the message-waiting indicator (MWI)
Net in XXXX	Communicating with a voice messaging network node that called in; XXXX is a local network mailbox
Net out XXXX	Communicating with a voice messaging network node after calling it; XXXX is the local network mailbox that
Notify XXXX	Calling out to subscriber XXXX for message notification to pager or other number
On hook	Idle, available for a call
Outbnd XXXX	Calling out for an outbound mailbox; XXXX is the subscriber mailbox that sent the message
Out of Service	Port placed out of service by the telephone system due to an error
Play XXXX	Playing the contents of announcement mailbox XXXX
Record XXXX	In use by a caller leaving a message for subscriber XXXX; uses the Record action on a Call Processor
Remind XXXX	Calling out for daily message reminder for subscriber mailbox XXXX
Set Lang XXXX	In use by a caller who has selected a language as part of an automated attendant session
Starting	Starting up
SubScr Fax XXXX	Receiving a fax for subscriber mailbox XXXX
SubScr Msg XXXX	In use by a subscriber recording a message; XXXX is the subscriber mailbox
Transact XXXX	In use by a caller accessing XXXX, an interactive mailbox
UCConnect *scriptname*	Running UCConnect script *scriptname*
Xfer XXXX	Transferring a call to device XXXX, or taking a message after an incomplete transfer to that device

Changing the Line Status View

The Line Status utility displays the line status of each port on each Call Server. The Line Status window of each Call Server includes a Status bar at the bottom of the window. In addition, a Status View menu is provided for each Call Server that is attached to toggle between the display the line status, extension number, call timer, the process ID of each line, or the System Manager view.

To change the line status view...

1. Select **Start** | **All Programs** | **UM8700 Desktop** | **Line Status**.
2. Enter the **Server Name**, the administrator's **User ID**, and the **Password** in the Line Status Login dialog box, and then click **OK**.
3. Double-click the name of the Call Server you want to view.
4. The Line Status of the Call Server displays.
5. Click the **Status View**, and then select any of the following options:

   Line Status - Displays the operating status of all lines; this is the default option.

   Extensions - Displays the extension number associated with the line on the Lines tab of UM8700 Configuration.

   Call Timers -Display three state durations per line in the format X:MMM:SS, where MMM represents the minutes and SS represents the seconds. X represents one of the following status indicators:

- **S** indicates that the line has been in the state displayed on the Line Status display or the indicated amount of time.
- **C** indicates that the line has been active for the indicated amount of time.
- **L** indicates that the line has been Open, Closed, or Out of Service for the indicated amount of time.

NOTE If the duration exceeds 999:59 seconds, then the duration displays as ***:**.

Process IDs - Displays the ID number that the operating system has assigned to the copy of the AT_Phone process currently executing on the line. You can use this ID number within the Windows Task Manager to help troubleshoot problems with specific lines. (This information displays for active ports only.)

System Manager - Displays the current system processes of the Call Server.

Installing Anti-Virus Software

NEC recognizes that most company policies require the installation of virus-scanning software on all servers including UM8700. However, as a real-time system performing business-critical functions, do not expect UM8700 to perform to specification if a third party application periodically makes essential CPU, memory, and disk resources unavailable. Accordingly, virus-scanning software on UM8700 servers is usually configured differently than other IT applications such as Internet, mail, and ftp servers.

IMPORTANT If Neverfail is installed with UM8700, refer to knowledgebase article #104 on the Neverfail extranet. Follow their anti-virus guidelines in addition to the NEC guidelines described in this document.

Recommendations

A preferred solution is to schedule virus scanning on a daily basis during low server activity. The selected time should not coincide with scheduled daily maintenance. Should a periodic scan not be acceptable, the virus scanning software may have multiple configurations or approaches for continuous or active scanning.

All virus scan solutions including periodic, active, and continuous background scans of directories or disks may significantly impede operating system resources, and prevent UM8700 from responding to calls. It is the customer's responsibility to test the virus scanning software in conjunction with UM8700 during a high load condition to assure correct system operation.

When configuring the virus scan software, the preferred choice is the one that uses the least amount of CPU and generates the least amount of disk activity. The following guidelines help minimize the impact of virus scanning on the UM8700 server.

Directory Exclusions

Often, virus scan software allows the configuration of a specific set of directories for exclusion from the virus scans. Directories that include any files that are part of UM8700 operation, including product files such as executable files, and operational files such as WAV files, should be excluded from virus scanning.

System Server Exclusions

- D:\CX
- C:\Program Files\MySQL
- C:\Program Files\Nuance
- C:\Program Files\ScanSoft

Call Server Exclusions

- D:\CX
- C:\Program Files\MySQL
- C:\Program Files\Nuance
- C:\Program Files\ScanSoft
- C:\Program Files\Dialogic (If installed)
- C:\Program Files\Aculab (if installed)

System Server with Neverfail (Both primary and secondary)

- D:\CX
- C:\Program Files\MySQL
- C:\Program Files\Nuance
- C:\Program Files\ScanSoft
- C:\Neverfail\R2\logs
- C:\Neverfail\r2\log
- C:\Neverfail\R2\FSMTemp

Integrated Client Access (ICA) Server

- D:\NEC\Integrated Client Access
- Digital Networking Server
- D:\CX

Process Exclusions

Some virus scan software allows the exclusion of processes:

- If process exclusion is available, exclude the processes that comprise the UM8700, Nuance, ScanSoft, MySQL, and Neverfail applications.
- If Dialogic cards are installed in the system, exclude the processes that comprise the Dialogic application.
- If Aculab cards are installed in the system, exclude the processes that comprise the Aculab application.

Customer IT personnel should recognize that some anti-virus utilities may generate false-positive warnings on a perfectly clean UM8700 system. Accordingly, we advise onsite monitoring of the first few scans by an administrator or technician.

NOTE NEC will expend a good faith, reasonable effort to support UM8700 with virus-scanning software installed. However, NEC cannot guarantee compatibility or interoperability between UM8700 and any particular virus-scanning product.

Administering UM8700 Remotely

This section discusses the tools necessary to administer a UM8700 system from a remote location. NEC supports the following remote administration methods:

- Remote administration through a Microsoft Windows Remote Desktop Connection session
- Monitoring and controlling the server software using a Simple Network Management Protocol (SNMP) management console and the UM8700 SNMP extension agent
- Desktop-level remote administration over a serial or TCP/IP link using Symantec pcAnywhere

NOTE The connection to UM8700 Admin defaults using Secure Sockets Layer (SSL). If you do not want to use SSL to connect to UM8700 Admin, you must append http:// to the server's address to force an unencrypted connection, for example, http://systemserver.domain.com. SSL connections are supported to the home server only. If you are using Global Administration to administer multiple systems, you must append remote server addresses with http://.

If the server does not support SSL, you are prompted to try logging again using an unencrypted connection. If this connection succeeds, the application remembers to use the unencrypted connection in the future. The http:// prefix can be removed at any time once the server is upgraded to a version that supports SSL, and you want to use SSL by default.

Using Windows Remote Desktop Connection

UM8700 software is compatible with Microsoft Windows Terminal Services and functions properly within a Windows Remote Desktop Connection session. In many cases, all you need to do to administer UM8700 through Terminal Services is to configure the UM8700 server platform as the host and log on through Remote Desktop on the computer you want to use.

To start a Remote Desktop Connection session…

1. From the Start menu, point to **Programs** | **Accessories** | **Communications**, and then click **Remote Desktop Connection**.
2. From the Computer list box, select the server name of the UM8700 platform.
3. In the new Remote Desktop session, log on to Windows as you normally would on the UM8700 platform.

NOTE If you are logging on remotely to a UM8700 server it is not always necessary to attach to the console, but it is required to attach to the console when performing installs, upgrades, or performing callout tests (on the Call Progress tab). The /admin switch works on Windows 7 and Windows Server 2008.

Note that for older versions of UM8700, logging on remotely to the console causes UM8700 to lose access to the hardware lock, thus initiating a 96-hour countdown to system shutdown.

Using Remote Desktop as described in the preceding steps causes Terminal Services to mirror the desktop of the UM8700 platform on your local computer.

IMPORTANT The UM8700 licensing routines prohibit validation of any license information over any network connection. Because of this, you can use the Administrative Pack's version of Remote Desktops session to shut down UM8700, but not to start it again. Because a standard Remote Desktop session mirrors the desktop of the UM8700 platform without moving it, you can restart UM8700 in such a session.

To start an administrative Remote Desktop session...

1. From the Start menu, point to **Administrative Tools**, and then click **Remote Desktops**.
2. In the left pane of the Remote Desktops window, expand Remote Desktops if necessary and double-click the name of the UM8700 server platform.
3. In the Remote Desktop session that displays in the right-hand pane of the window, log on to Windows as you normally would on the UM8700 platform.
4. To end the session, right-click the UM8700 platform in the left pane and select **Disconnect** from the menu that displays. You can then unlock the UM8700 platform and log on locally.

TIP To save time, you can unlock the UM8700 platform and log on without disconnecting first. If you do, the session in the Remote Desktops window disconnects automatically.

Using SNMP

The UM8700 SNMP extension agent can provide management information about the System Server and Call Servers to any SNMP management console that can use management info base (.mib) or trap definition (.tdf) files. The SNMP extension agent is an option you can select as part of the UM8700 software installation process. For more information about this process, see *System Installation Guide*.

Once the extension agent has been installed and a management console has been configured to manage it, you can use it to manage the UM8700 Server from another computer on the same LAN or WAN. If the UCConnect or Digital Networking features are installed on the server platform, you can use the extension agent to manage them as well.

For more information about SNMP gets, sets, traps, and error messages available from UM8700, refer to the online book *SNMP*. Diagnosing UM8700

The information in this section presents solutions to common problems that can occur in a UM8700 system during normal operation. Troubleshooting tasks that arise during installation of the system or its advanced features are included in the installation documents listed in the following table.

For more about installing and troubleshooting…	***See …***
An enterprise system of two or more correspondent Telephony Servers permitting global administration from one site	The online book *NetConnect Digital Networking*
Fax message routing between a OpenText RightFax fax server and a UM8700 system	The *RightFax Getting Started Guide* and the online books *Fax Messaging* and *Faxtext*
Integrations between Call Servers and the	*System Installation Guide* and the appropriate Integration Technical Note for

telephone system	the telephone system
Unified messaging through an Internet Message Access Protocol (IMAP)-compliant e-mail server	The online book *UM8700 Unified Messaging for IMAP*
Unified messaging through a Lotus Domino server	The online books *UM8700 Unified Messaging for Lotus Notes and Domino* and *UM8700 for IBM Lotus Domino Unified Communications*
Unified messaging through a Microsoft Exchange server	The online books *UM8700 Unified Messaging for Microsoft Exchange* and *Directory Agent for Microsoft Exchange*
Voice and fax message networking between System Servers	The online books *Digital Networking* and *Analog Networking*

Using pcAnywhere

To provide remote administration of UM8700 systems, NEC supports Symantec pcAnywhere. If necessary, Technical Support can use pcAnywhere to help diagnose and correct problems at remote sites.

IMPORTANT Be sure to change the password on the Telephony Server's Administrator account as soon as possible. Once additional copies of UM8700 Admin are installed on the server's LAN or WAN, and pcAnywhere is installed on the server platform itself, *an unprotected Administrator account poses a serious security risk*.

pcAnywhere Platform Requirements

To determine the platform requirements for the version of pcAnywhere that you are using, consult the *pcAnywhere User Manual*.

IMPORTANT You must use pcAnywhere version 10.5 or later. Previous versions of pcAnywhere may prevent the operating system from functioning properly.

Logging On to UM8700 Remotely using pcAnywhere

pcAnywhere runs as a normal Windows application on the UM8700 server platforms and the computer used as the remote terminal. The pcAnywhere User Manual explains how to install the software on both platforms.

When you run pcAnywhere on a UM8700 system, NEC recommends that you take the following actions:

- Install the software to drive D.
- To discourage abuse of the platform, set login names and passwords for the callers who need to administer the server platform remotely. These caller definitions, which are set on the property sheet for each *Be a Host PC* item, should include the NEC recommended user name and password. If you do not know this user name or this password, contact Technical Support.
- Configure all security options completely for the *Be a Host PC* item that runs on the server platform.

- Set the Video Mode Selection box on the Host Operation tab of the Application Options dialog box to Compatibility.
- Once you have configured a Be a Host PC item appropriately on the server platform, you can double-click it to start a pcAnywhere host session. At any time while that host session is running, you can connect and log on to the server platform by starting a remote control session in the copy of pcAnywhere installed on your computer. For more details about the logon procedure between the pcAnywhere sessions, consult the *pcAnywhere User Manual*.
- Once you have started your remote control session and logged on, you should see a windowed copy of the current screen on the server platform. At this point, you can administer the system remotely.

Modifying Message Phrase Template XML files

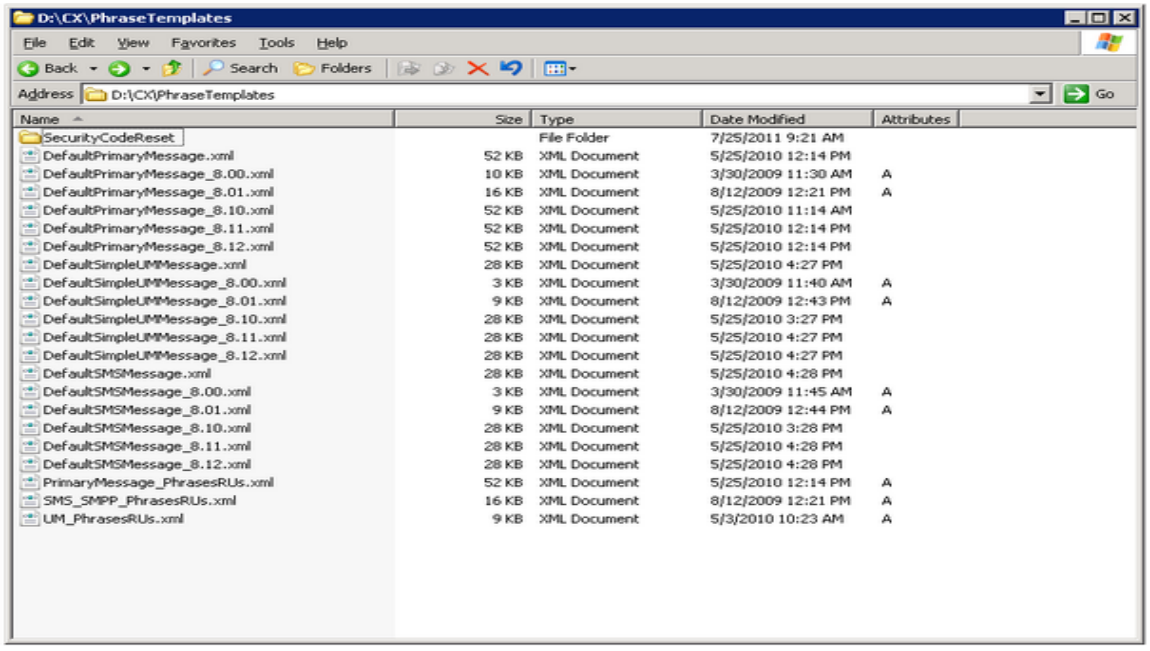
Use the Message template XML files to modify the language, message header, or body text of SMS and e-mail messages generated by UM8700 to subscribers. Message templates are used when generating messages from the following UM8700 sources:

- Unified Messaging (Microsoft Exchange, Lotus Notes)
- Message Subject for Integrated Client Access (ICA) and Web PhoneManager
- SMS, SMTP, and Simple UM
- Subscriber Security Code Reset messages (Web PhoneManager)

When you are configuring these features for subscribers, you must customize the default phrase template files so that messages sent to subscribers have the telephone number, web site, or e-mail address that is specific to the site. This practice helps subscribers identify the sender and allows subscribers to reference the correct system when retrieving messages.

Default message phrase template files are provided in the Telephony Server software for each type of notification message UM8700 sends to subscribers. When you install the Telephony Server software, a set of default phrase files are installed in the CX\PhraseTemplates folder. If the server was upgraded from a previous version of software, an additional copy of the files are installed during software installation. The new XML files are renamed with the software version number following the default name. The file content is identical initially. The reason the files are renamed during installation is to protect any existing default files on the server, in the likelihood they were previously modified.

For example, the default primary template file is named DefaultPrimaryMessage.XML. If the server is upgraded from a previous software version to version 8.6, a new file is copied to the folder but the new file name is changed to DefaultPrimaryMessage_8.60.XML.



IMPORTANT The phrase template XML files you use must remain in the same default CX\PhraseTemplates folder or the sub-folder in which they are installed in order for UM8700 to access them when requested.

The default message template files for the Subscriber Security Code Reset Request feature of Web PhoneManager are located in a subdirectory of the Phrase Message template folder, CX\Phrase\Template\SecurityCodeReset. They must remain in the same CX\PhraseTemplates\SecurityCodeReset sub-folder in which they are installed in order for UM8700 to access them when requested.

For more information on the syntax and structure of XML Phrase Message templates, refer to the topic, “Appendix B – Understanding XML Phrase Message Templates.”

Editing XML Files

NEC recommends using an XML editor to edit the message template XML files. An XML editor provides tag completion features and common menu choices for editing XML files. You can find several free XML editors available on the Internet. For example, both the Source Forge Notepad ++ and Microsoft XML Notepad applications are good XML editors. In addition, Notepad can also be used to open and edit XML files.

IMPORTANT Use the default XML files as a reference. Before you modify an XML file for use in the system, make a copy of the default file, give the file a new name that you can refer to later, and then make your modifications in the new file. If you encounter a problem with the modified file, use the default file as a reference to begin again.

Customizing Message Template XML Files

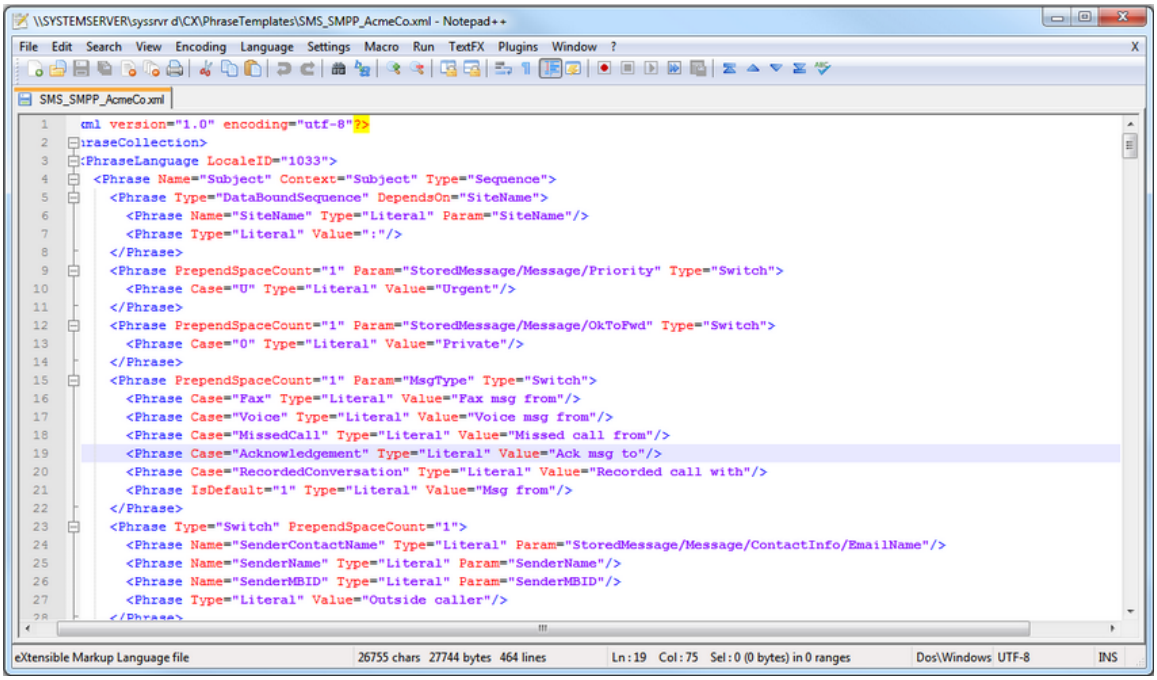
You must customize Message Template files for the individual site. You can use a unique message template file for each type of provider that is configured on UM8700. In general, you are simply changing values within each phrase to modify the language, the message header, or the body text of e-mail and SMS messages for subscribers that UM8700 sends to the subscriber’s mobile device or e-mail server.

To customize an SMS message template file…

The following procedure uses a copy of the defaultSMSMessage.xml to provide an example of message-template file customization for SMS.

1. Navigate to the CX\Bin\PhraseTemplates folder.
2. Select the default message template XML file you want to use.
3. From the menu bar, select **Edit**, and then **Copy**.
4. From the menu bar, select **Edit**, and then **Paste**. A copy of the selected file is pasted to the folder.
5. Highlight the new file, and then rename it to something appropriate for its use. For example, if you are customizing the default SMSMessage.XML file for SMS with the service provider Acme Company, rename the new file SMS_SMPP_AcmeCo.XML.

6. Open the SMS_SMPP_AcmeCo.XML file with an XML editor, such as Notepad++.



7. In this example, line 43 is the literal phrase for the site's telephone number. This is the number subscriber's dial to retrieve messages. The default line reads <Phrase Type="Literal" Value=XXX-XXX-XXXX/>.
8. Replace the X template characters with the ten-digit telephone number that subscribers dial to retrieve messages (typically the main UM8700 number).

```
43    <Phrase Type="Literal" Value="415 555 1234"/>
```

9. In this example, line 45 is the literal phrase for the site's Web PhoneManager website. If subscribers use Web PhoneManager to manage their messages, change the value on this line to that of the site's website address. The default line reads: <Phrase Type="Literal"Value=webservername.com/wpm/>.
10. Replace the default web server name to that of the site's website address for Web PhoneManager. For example, <Phrase Type="Literal" Value=Acme.com/wpm/>.

```
45    <Phrase Type="Literal" Value="http://www.acmeco.com/wpm"/>
```

NOTE If your organization does not use Web PhoneManager, you can delete the lines in this section that refer users to the Web PhoneManager address.

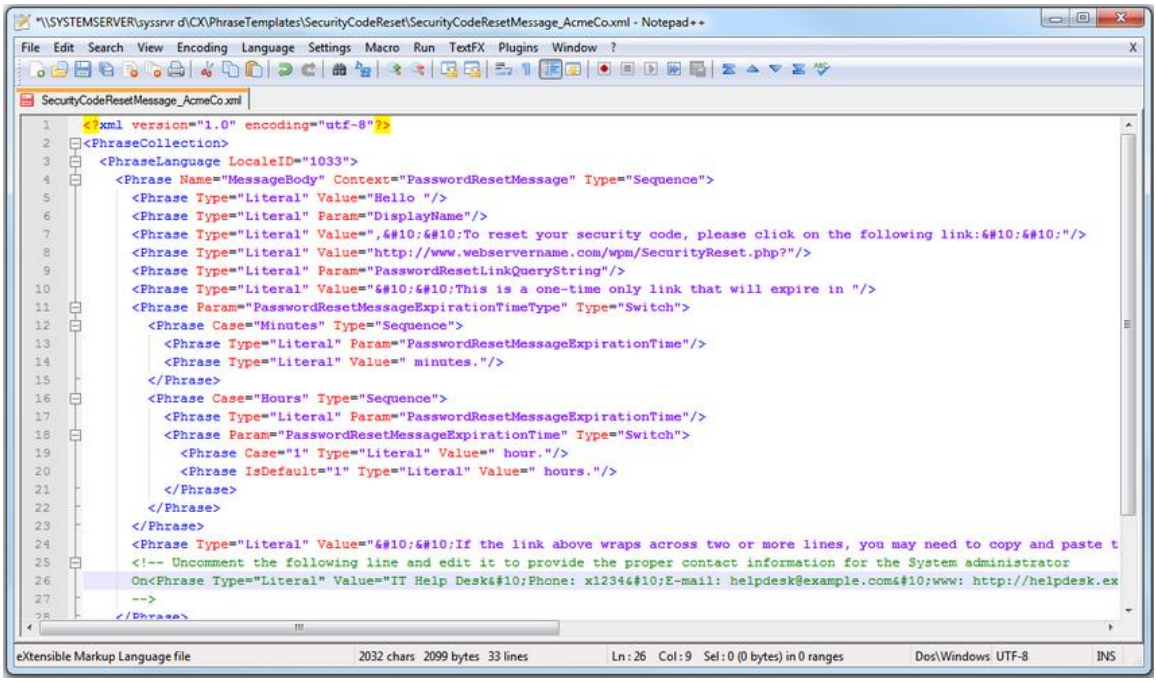
11. After you are finished customizing the file, save it, and then exit the editor.
12. Test the new message file by sending a message to a Subscriber mailbox configured to send SMS notification messages. If you want to change or add to the relevant information displayed in the message body of the message, open the file again, and then edit the file to suit your requirements.

To customize a Security Code Reset Message...

The following procedure uses a copy of the DefaultSecurityCodeResetMessage.xml to provide an example of message template file customization for SMS.

1. Navigate to the CX\Bin\PhraseTemplates\SecurityCodeReset folder.

14. Select the DefaultSecurityCodeResetMessage.xml file you want to use.
15. From the menu bar, select **Edit**, and then **Copy**.
16. From the menu bar, select **Edit**, and then **Paste**. A copy of the selected file is pasted to the folder.
17. Highlight the new file, and then rename it to something appropriate for its use. For example, rename the new file SecurityCodeResetMessage_AcmeCo.xml.
18. Open the SecurityCodeResetMessage_AcmeCo.xml file with an XML editor, such as Notepad++.



19. In this example, on line 8, change the default value www.webservername.com/wpm/SecurityReset.php? to the domain name or IP address of your Web PhoneManager.

```
8       <Phrase Type="Literal" Value="http://www.acmeco.com/wpm/SecurityReset.php?"/>
```

20. To provide subscribers with contact information to the administrator or company help desk, un-comment line twenty-six, or copy and paste it above line 25. It becomes line 25.
21. In the Value field, change the default text, the phone number, e-mail address, and website information to match the contact information for your site.

```
25      <Phrase Type="Literal" Value="Acme Help Desk&#10;Phone: 415 555 1234&#10;E-mail: helpdesk@acmeco.com&#10;www: http://acmeco.com"/>
```

22. After you are finished customizing the file, save it, and then exit the editor.
23. Test the new message file by performing a security code reset request from Web PhoneManager. If you want to change or add to the relevant information displayed in the message body of the e-mail message, open the file again, and then edit the file to suit your requirements.

Resetting the System Time

The System Server and its Call Servers uses the time and date settings of the Windows operating system. You should not ever need to change the system time and date, even if the server platform experiences a power failure, because the server platform's clock is backed up with an internal battery. The clock was also set during installation to adjust automatically for daylight savings time and your local time zone. The server platform uses the clock to track the dates and times at which voice messages are received. In addition, date and time information is used for diagnosing errors logged during normal operation. If your site is using Unified Messaging, it is important for the System Server and the E-mail server to synchronize system times. The Windows operating system includes a time synchronization service. Refer to the Microsoft operating system documentation for more information.

IMPORTANT You should not change the time randomly because it can affect message posting (causing late message complaints) or even result in lost messages. Before changing the system date, consult with the UM8700 dealer or Technical Support.

Shutting Down the Operating System

You might need to shut down or restart the Windows operating system to update it. You should shut the operating system down before powering off the server platform and servicing its components or moving it to another location.

Shutting down the operating system also shuts down the UM8700 software processes. However, NEC recommends shutting down the UM8700 processes separately before you shut down the operating system.

IMPORTANT Do **not** use the hardware reset button on the server platform at any time. Also, do **not** just power off the server platform. Shut down the UM8700 software processes by clicking **shutdown** from the Main tab of UM8700 Configuration, and then the operating system. Allow the operating system to power off the system. If you do not properly shut down both, you can lose important data.

To shut down the operating system...

1. From the Start menu, select **Shut Down**.
2. At the Shut Down Windows dialog box, select **Shutdown**.
3. Complete the Event Tracker information if required, and then click **OK**.
4. Wait for the computer to shut itself down, or wait for the message *"You can now safely turn off your computer" to appear on the monitor."*

IMPORTANT If you must turn off your computer manually, do not turn it off until the above message displays.

Solutions to Common Problems

The following table suggests steps that you can take to help troubleshoot common problems. Check these tables and the documents mentioned earlier in this chapter before contacting your dealer or Technical Support.

Problem	***Suggestion***
Subscribers are not receiving immediate message notification or daily message reminder calls.	Verify that the subscribers have sufficient callout permissions set in their mailboxes to support the calls. For example, if a subscriber wants to receive notification at home for certain types of calls, but only has permission for extension calls, the Call Server does not allow the notification calls. Verify the Call Server's dialing plan. It may be rejecting the subscribers' telephone numbers or not interpreting them correctly. You can check, edit, and test the dialing plan within UM8700 Admin. From the utility's menu bar, select **Configuration**, and then **System**. Click the Dialing tab. See the online help on the Dialing tab for more information.
Subscribers cannot place calls to outside numbers from their mailboxes, or Live Reply does not work.	Verify that the subscribers have sufficient callout permissions set in their mailboxes to support outbound calls.
Subscribers are having difficulty reviewing their messages and cannot find the PhoneManager menu.	Verify that the TUI type is set correctly for each subscriber.
The Call Server does not recognize subscribers; they must log on from the initial answer mode Call Processor.	Verify that the correct primary device numbers are set in the subscribers' mailboxes. Have the person who installed the integration system check the integration to make sure it is working correctly.
The Archive utility cannot back up information to the desired disk drive or data storage device.	Map the drive or device to a Windows drive letter. If you launch the Archive utility from the DailyMaintUser.bat file and you do not want to leave the drive letter assigned permanently, add the net use command to the beginning and end of the DailyMaintUser.bat file to assign a letter temporarily. See the Archive online help for more information.
UM8700 Admin cannot import/export network information from another System Server.	If the information was exported in Backup / Restore format, ask the other server's administrator to export it again in Zip format. If this is not possible, contact Technical Support for assistance.

Problem	*Suggestion*
Subscribers cannot activate message forwarding.	Forwarding is not available from Subscriber mailboxes whose message retrieval type is set to Store. These subscribers' messages are stored on an e-mail server; they (or you) should configure their e-mail profiles to forward messages under the appropriate conditions.
A directory listing (automated attendant, 1- Touch, or subscriber) does not mention a subscriber's name.	Verify that the name in the subscriber's mailbox is in the same order (last name first or first name first) as the other subscribers' names. Also, verify that the Auto Attendant Directory and Subscriber Directory boxes are selected appropriately in the subscriber's mailbox.
It is not possible to edit any settings in a subscriber's mailbox.	Verify that your administrator account has the appropriate access permissions set. You may need the assistance of another administrator to change these permissions. If the **External Directory Synchronization** box in the subscriber's mailbox is selected, do not attempt to change it without the assistance of your company's Exchange server administrator. *Deactivating external directory synchronization may prevent the subscriber's mailbox from working correctly.*
Callers complain of being disconnected while waiting to speak to a subscriber.	If the subscriber has call queuing active, try creating an Announcement mailbox, storing a hold music loop in it, and setting it as the subscriber's queue announcement. Make sure that the music loop is as long as or longer than the amount of time specified in the subscriber's Retry Interval setting.
Announcements and greetings have vanished without an apparent reason.	Check to see whether the server's default prompt set has been changed. If so, the announcements and greetings need to be re-recorded for the new default.
Mailboxes have vanished without an apparent reason.	Check to see whether the mailboxes had a sponsoring mailbox and whether that mailbox was deleted. If so, contact Technical Support.
Announcements or greetings have poor sound quality.	If the recordings were made over the telephone, try recording them again from a reliable telephone in a quiet area. If the recordings were created as .wav files and imported, verify that they were in the correct audio format.
You are not allowed to record announcements, greetings, or mailbox names (other than those for your own subscriber mailbox) over the telephone.	Verify that the **Record Mailbox Names** and **Record Announcements** boxes are selected in your Subscriber mailbox.
A Call Processor mailbox does not accept a two-part greeting.	Verify that the Call Processor's Two-Part Greeting box is selected. Two-part greetings do not work in ESP Call Processor mailboxes.

Problem	*Suggestion*
When you are using UM8700 Admin, the System Configuration tabs are not available to you.	Verify that your administrator account has the appropriate access permissions set. You may need the assistance of another administrator to change these permissions.
You cannot .log on to use the Reports utility.	Verify that your administrator account has the appropriate access permissions set. You may need the assistance of another administrator to change these permissions.
The reports do not include recent changes that you have made.	From the File menu in the Reports utility, select the **Update Log Data**, **Update Mailbox Data**, and **Update Administrator Data** commands, and then generate the report again.
Subscribers' message-waiting indicators are not switching on and off at the appropriate times.	Try changing the subscribers' MWI mode settings.
When attempting to dial a number, subscribers hear a series of three beeps followed by a recorded message.	UM8700 supports the use of Special Information Tones (SIT). SIT Tones are based on an international standard and consist of a three beep signal indicating a call could not be completed as dialed. Generally, these tones precede a recorded announcement that explains the problem. Examples of this include a disconnected number, busy circuits, dialing error, and so forth. If you hear one of these tones, hang up and try your call again.

Keeping Private Messages Locally

Setting Keep Private Message Locally

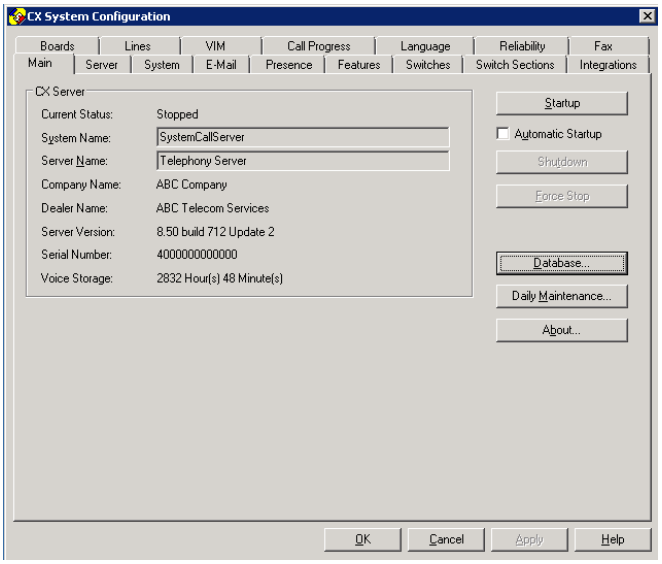
NOTE Keep Private Messages Local is currently only supported for Microsoft Exchange 2010 or greater.

There may be a case where a system administrator would wish to keep private messages on the local server and prevent them from being forwarded to other users on the same server or other remote telephony servers. Exchange doesn't restrict forwarding, and therefore isn't secure when using Unified Messaging to store messages on the Exchange Server. When enabled, this allows non-private messages to be delivered to the subscriber's Exchange inbox. For private messages, a notification message is sent to the subscriber's Exchange inbox informing them of the private message and instructing them to use a phone to retrieve the message.

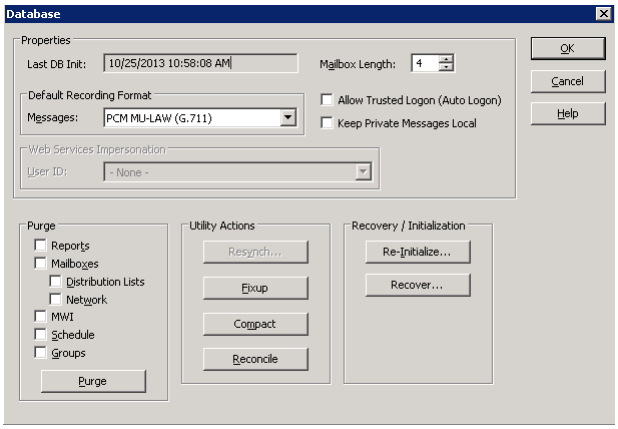
To locate and activate Keep Private Messages Local, do the following:

1. Open **UM8700 System Configuration** by double-clicking the desktop icon or navigating to **Start → All Programs → UM8700 Desktop → UM8700 Admin**.
2. On the **Main** tab, click **Shutdown** if UM8700 is running.

   NOTE The server must be shut down to enable or disable Keep Private Messages Local.



3. Once *Current Status* displays *Stopped*, click the **Database** button. The *Database* screen displays.



4. To enable or disable, check or clear the **Keep Private Messages Local** checkbox.
5. Click **OK**.
6. Click **Startup** to start the server.

NOTE Instead of delivering the private message to an external store, such as Microsoft Exchange, the message is stored locally and a notification is sent via email. This process uses the DefaultExternalStoreNotificationMessage.xml phrase template to generate the notification message's body and subject. Instead of the locally stored message, the Notification Message triggers the MWI indicator for private messages.

Appendix A - Working with the Mobile Web PhoneManager Application

Mobile Web PhoneManager is a web application specifically designed for mobile Internet browsers. This application enables you to manage your availability schedule from your mobile device browser. With Mobile Web PhoneManager, you can do the following:

- View your current Availability Settings including availability, duration and devices you are currently using for that setting
- Change your current availability including type and duration

After going to the Mobile Web PhoneManager site (you can get the address from your system administrator) to change your availability, simply click on the type of override you wish to enable. This list displays the following types of items:

- Your schedule - This item routes calls to you based on the settings from your UM8700, Schedules, and Calendar. The system administrator creates this schedule for you. You can view it from the Availability Settings and Daily Schedule tabs.
- Your Availability States - You can directly route calls to any of your Find-me Devices.

To enable an override, do the following…

- Select the availability you wish to enable from the Availability drop down.
- Set the duration for the override. Durations can be Indefinite or set to a specific time or duration for which you want the override to remain in effect.

You can get more information about your Call Lists, Schedules, and Calendar settings either from your system administrator by going to the UM8700 Web PhoneManager application from a traditional Internet browser.

Known Display Issues

Blackberry devices using operating systems prior to the 5.0 version will display the Mobile Web PhoneManager differently than the 5.0 and later versions. Blackberry versions older than 5.0 will have the following browser display issues:

- The text on the submit buttons is not properly centered on these browsers. These versions of the BlackBerry browser do not center the text and do not support changing its alignment.
- The vertical alignment of the drop-downs menus in the time selection screen does not display correctly.
- Users have to select the corresponding radio button manually for a duration when they select a drop-down menu.

Appendix B – Understanding XML Phrase Message Templates

The UM8700 Phrase Engine uses XML template files that exist in the "\CX\PhraseTemplates" folder on the hard drive on which your UM8700 system resides. This mechanism allows you to create different phrase representations within different languages. You can customize these representations by modifying the default phrase files or by creating new ones. This topic describes the syntax that these XML phrase files use to modify the language, message header, or body text of messages generated by UM8700 to subscribers. After knowing the syntax, you can modify the templates to customize the message subject and body text of messages generated by UM8700 to subscribers for any language.

For information on modifying a message template, refer to the topic, "Modifying Message Phrase Template XML files."

Syntax

You can construct a phrase from component phrases, and then these component phrases can be constructed from other sub-component phrases, in a nested type of construction.

Each phrase definition is always a `Phrase` element. The phrase definition syntax allows nesting of `Phrase` elements thereby providing a way to build a phrase from sub-phrases and sub-sub-phrases and so on. There is no hard limit to this nesting depth.

`Phrase` elements support a `Name` attribute; the name that UM8700 uses to look up the phrase for evaluation.

For example, when the UM8700 Phrase Engine needs to build the subject for a message, it locates the phrase named "Subject" beneath the `PhraseLanguage` element for the active language within the configured phrase file. UM8700 then uses this definition to build the Subject. The subject that UM8700 builds is specified fully by the `Phrase` element named "Subject" and its direct and indirect child `Phrase` elements.

- The syntax for phrase definition also allows for runtime variables or parameters. You can access and make use of parameters within the Phrase file, at any nesting level. You can use a parameter's value to directly substitute and act as the value of the phrase. Alternatively, you can use the Parameter's value to drive a switch-case type of conditional logic to select a particular component phrase.
- You can only use parameters that UM8700 supports. Parameters are packaged into a context object and only parameters that are part of the context object may be referenced within the phrase files. You can view the context object as a nested XML structure that contains elements with no attributes.
- You can reference any parameter within the context using the X-PATH notation. You can reference immediate child elements of the context element by name. You can reference indirect child elements of the context by specifying a path, with each branch delimited by the '/' character.

Here is an example context for message subject generation:

```
<Subject>
  <MsgType>Voice</MsgType>
  <FaxPageCount>0</FaxPageCount>
  <SenderName>AUDIO ADMINISTRATOR</SenderName>
  <SenderMBID>9999</SenderMBID>
  <SenderRemoteNodeName></SenderRemoteNodeName>
  <SenderTel></SenderTel>
  <IsSenderSub>1</IsSenderSub>
  <StoredMessage>...</StoredMessage>
</Subject>
```

IMPORTANT When you are working with a phrase file, the context does not exist and is not visible anywhere within the file. It is only a concept, a conceptual container that holds all of the runtime parameter values that can be referenced within phrase definitions. The context is actually only created and used by UM8700, for example when a subject phrase needs to be generated for a message.

The `Param` attribute of the `Phrase` element references a parameter. The syntax for specifying the `Param` is an X-Path Syntax. For example, you can create a `Phrase` element like the following to reference the `SenderMBID` parameter. When the UM8700 Phrase Engine evaluates this phrase, the mailbox number value (9999) is substituted, and then used as the runtime value of this phrase.

```
<Phrase Type="Literal" Param="SenderMBID"/>
```

Note the `StoredMessage` element within the above context. This is an XML structure by itself. The complete structure is not shown in the above context example for the sake of conciseness.

The following is a `Phrase` element example that references the MBID (mailbox number) of the recipient, which is a deeply nested element within the `StoredMessage` XML structure. Here again, the value of MBID is used directly as the value of the phrase.

```
<Phrase Type="Literal" Param="StoredMessage/Message/Recipients/Recipient/MBID"/>
```

The following is another example of context, an example for generating the body text of a Security Code Reset Message.

```
<PasswordResetMessage>
  <MBID>5700</MBID>
  <FirstName>Human</FirstName>
  <MiddleName></MiddleName>
```

<LastName>Being</LastName>

<DisplayName>Being, Human</DisplayName>

<ClientCodePage>1033</ClientCodePage>

<EmailAddress>hbeing@NEC.com</EmailAddress>

<AllowPasswordReset>1</AllowPasswordReset>

<PasswordResetRequestID>c519af4e-2b17-487e-a050-45aaedf10ef3</PasswordResetRequestID>

<PasswordResetRequestTimestamp>2011-08-03T23:59:16Z</PasswordResetRequestTimestamp>

<PasswordResetLinkQueryString>RequestID=c519af4e-2b17-487e-a050-45aaedf10ef3&MBID=5700&DisplayName=Zero%2c%20Local&Server=https://seadsk01596.NEC.com:18277</PasswordResetLinkQueryString>

<PasswordResetMessageExpirationTimeType>Minutes</PasswordResetMessageExpirationTimeType>

<PasswordResetMessageExpirationTime>3</PasswordResetMessageExpirationTime>

</PasswordResetMessage>

Notice that this context does not have any nested XML structures. So all of the parameters are accessible simply by their name, as in the example below:

<Phrase Type="Literal" Param="PasswordResetLinkQueryString"/>

Phrase File Structure

At the root of each file is the PhraseCollection element. This single element holds all the content within the file. `PhraseLanguage` is a child element of `PhraseCollection`. There can be multiple `PhraseLanguage` elements with each `PhraseLanguage` holding all the phrases for one particular language. The `LocaleID` attribute of the `PhraseLanguage` element specifies the language (specifically the culture) for all the containing phrases.

A list of LocaleIDs is available on the following website:

http://msdn.microsoft.com/en-us/goglobal/bb964664.aspx

NOTE The Phrase Engine uses the LocaleID; it is directly related to the more commonly used culture name. The mapping between the LocaleID and the culture name is well defined. There are Software Development Kit functions that allow Windows Vista and later operating systems to support that perform a conversion between the two. For example, the LocaleID for “en-US” is 1033.

A `PhraseLanguage` element contains Phrase definitions for various Phrases.

Phrase Types

A `Phrase` element is one of the following types as specified by its Type attribute:

- Literal Phrase:

If a `Value` attribute is specified then it is used as the value of the phrase. If a `Param` attribute is specified, the dynamic value is retrieved from the context and that is used as the value of the phrase. A phrase of this type cannot have children.

Example of a Literal phrase with value from a Parameter:

```
<Phrase Type="Literal" Param="SenderMBID"/>
```

- Sequence Phrase:

  A Sequence phrase is a container and usually has more than one child. Sequence phrases are evaluated by evaluating each of their child phrases and by concatenating their values in the order that they are specified in the XML file.

  ```
  <Phrase Case="Fax" Type="Sequence">
    <Phrase Type="Literal" Param="FaxPageCount"/>
    <Phrase Type="Literal" Value=" Page fax from"/>
  </Phrase>
  ```

  In the above example, the phrase evaluates to “3 Page fax from” if 3 is the runtime value of the `FaxPageCount` parameter within the context.

- Switch Phrase:

  Like the Sequence phrase, this is a container phrase too. However, it needs a `Param` attribute. This phrase is evaluated by retrieving the value of the parameter from the context and then evaluating the single child phrase that has the matching value in its `Case` attribute. Note that the final value of this Phrase is the value of the evaluated single child phrase. As such, this phrase type helps implement a conditional switch-case logic.

  ```
  <Phrase Type="Switch" Param="StoredMessage/Message/DeliveryError">
    <Phrase Case="3415" Type="Literal" Value="Delivery Error: Invalid mailbox"/>
    <Phrase Case="3426" Type="Literal" Value="Delivery Error: No message space on
  receiving system"/>
    <Phrase Case="3427" Type="Literal" Value="Delivery Error: No such mailbox"/>
    <Phrase Case="3428" Type="Literal" Value="Delivery Error: All network messages
  returned by admin"/>
    <Phrase IsDefault="1" Type="Literal" Value="Delivery Error: Could not deliver"/>
  </Phrase>
  ```

  In the above example, the value of the Switch phrase is based on the `DeliveryError` parameter. In the case of a particular message, this is equal to 3426. In this case, the value of the phrase is the value after evaluation of the second child phrase. This would thus cause the value of the phrase to be “Delivery Error: No message space on receiving system”.

  Suppose that for another message the value of the `DeliveryError` parameter is 3000. This value does not match with any of the case values specified by the child phrase elements. However, since there is a default child phrase with its `IsDefault` attribute set to 1, it becomes the phrase that is evaluated when none of the other phrases match. This causes the value of the phrase to be “Delivery Error: Could not deliver”.

- DataBoundSequence Phrase:

  The DataBoundSequence phrase is a container and usually has more than one child. It is evaluated by first evaluating the single child phrase that is referenced by its `DependsOn` attribute. If the evaluated value of this is anything other than an empty string, each of the other child phrases are evaluated and the final value is the value of all the evaluations concatenated together in the order they appear in the XML. This is useful for prefixing variable strings with language-specific strings.

  ```
  <Phrase Type="DataBoundSequence" DependsOn="SenderTel">
    <Phrase Type="Literal" Value="Tel: "/>
    <Phrase Name="SenderTel" Type="Literal" Param="SenderTel"/>
  </Phrase>
  ```

  For example, generating the phrase, “Tel: 425 555 5555” where the telephone number is the variable. If the variable part is empty then the entire phrase should be empty.

Phrase Element Attributes

The following table summarizes the attributes you can apply to a phrase element:

Attribute Name	***Applies To***	***Description***
Name	All phrase types	The identifier for a phrase element This must match the name for which UM8700 searches.
Context	All phrase types	Identifies the context that UM8700 provides when it evaluates the Phrase, its children, grandchildren, and so on
Type	All phrase types	Specifies the type of the phrase such as Literal, Sequence, Switch or DataBoundSequence
RefPath	All phrase types	Borrows a phrase definition from some other place within the same language section This allows the re-use of phrase definitions so that they need not be repeated in many places.
Param	All phrase types except the Sequence type	Specifies the parameter to be used in an X-Path notation relative to the context
Case	Phrases whose parent phrase is a Switch type	Specifies the static value that must match the dynamic value of the parameter (specified in the parent phrase) in order for this phrase to get evaluated

Value	Literal phrase type	Specifies the string, which is the result of the evaluation of this phrase. **IMPORTANT** Most customizations can be made by simply changing this attribute.
IsDefault	Phrases whose parent phrase is a Switch type	If this value is 1, it means that this Phrase is treated as the default case when none of the other cases matches.
DependsOn	DataBoundSequence type	Specifies the name of the child phrase whose evaluation to something other than an empty string is a necessary pre-condition for evaluation of this Phrase
PrependSpaceCount	All phrase types	Specifies the number of spaces to prepend to the evaluated result of this phrase Space prepending only happens if the Phrase evaluates to something other than an empty string.

STRUCTURE OF StoredMessage

It is necessary to know the XML structure of a message in order to determine the XPath used to reference a parameter within it correctly. To serve this purpose, an example of the StoredMessage XML is provided below.

```
<StoredMessage>
  <StoreType>Local</StoreType>
  <Folder>New</Folder>
  <Read>0</Read>
  <Deleted>0</Deleted>
  <SoftDeleted>0</SoftDeleted>
  <Purged>0</Purged>
  <Message>
    <OkToFwd>1</OkToFwd>
    <ReturnReceiptRequested>0</ReturnReceiptRequested>
    <ReceiptType>None</ReceiptType>
    <DeliveryError>0</DeliveryError>
    <SubdueReply>0</SubdueReply>
    <TotalVoiceMsec>6660</TotalVoiceMsec>
```

```
<MsgID>1000</MsgID>
<PermanentMsgID>LS\1235087639</PermanentMsgID>
<Type>Voice</Type>
<VoiceMsgSubType>Normal</VoiceMsgSubType>
<Priority>N</Priority>
<SentTimestamp>2010-01-14T01:43:12Z</SentTimestamp>
<DeliveryTimestamp>2010-01-14T01:43:12Z</DeliveryTimestamp>
<UserDeliveryTimestamp>2010-01-13T17:43:12-08:00</UserDeliveryTimestamp>
<ChangedTimestamp>2010-01-14T01:43:25Z</ChangedTimestamp>
<Subject>Message vocal provenant de Copy of 5000 Boîte vocale: 55626</Subject>
<Sender>
  <MBID>55626</MBID>
  <Location>
  </Location>
  <RemoteMBID>
  </RemoteMBID>
  <Extension>
  </Extension>
  <Name>Copy of 5000</Name>
  <EmailName>
  </EmailName>
  <EmailAddress>
  </EmailAddress>
  <PhoneNumber>
  </PhoneNumber>
  <MobileNumber>
  </MobileNumber>
</Sender>
<Recipients>
  <Recipient>
    <MBID>57001</MBID>
    <Location>
    </Location>
    <RemoteMBID>
    </RemoteMBID>
```

<Extension>
</Extension>
<Name>
</Name>
<EmailName>
</EmailName>
<EmailAddress>
</EmailAddress>
<PhoneNumber>
</PhoneNumber>
<MobileNumber>
</MobileNumber>
</Recipient>
</Recipients>
<Attachments>
<Attachment>
<ID>0</ID>
<FileType>4</FileType>
<FileName>0bc75bcc-9948-4e4e-9f94-456400c854d3</FileName>
<IsBody>0</IsBody>
<FilePath>\CX\speech\msgs\0bc75bcc-9948-4e4e-9f94-456400c854d3.WAV</FilePath>
<PageCount>0</PageCount>
</Attachment>
</Attachments>
</Message>
</StoredMessage>

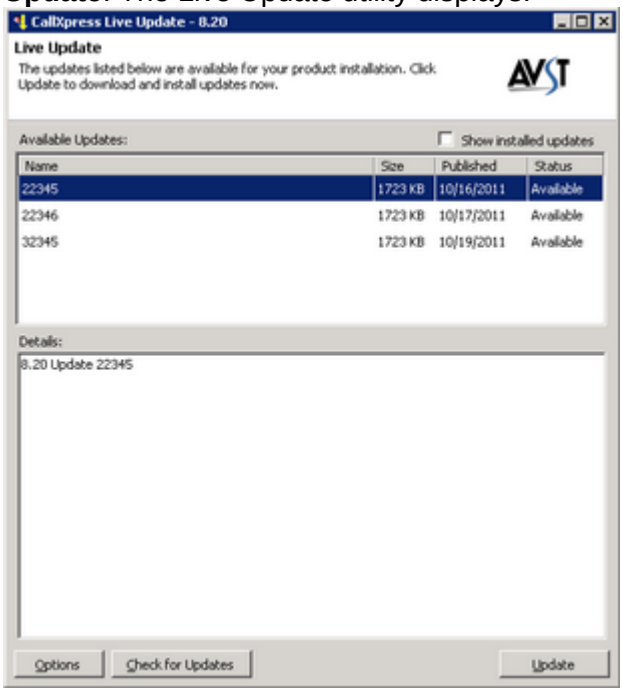
Appendix C - The Live Update Utility

The Live Update utility allows you to configure each server in the system to connect with the Live Update Server during Daily Maintenance and check for software updates. If an update is available, a message is posted to the server's desktop tray and a pop-up message displays on the desktop. Administrators can quickly determine if an update is available when they log on to the server. In addition, you can configure the Service to send an e-mail if new updates are available.

NOTE You must configure the Live Update utility to run on Remember to always update the System Server first, and then update the Call Servers in the system.

To start the Software update utility from the desktop…

1. Log on to the Telephony Server.
2. From the taskbar, select **Start** | **Programs** | **UM8700 Desktop**, and then click **Live Update**. The Live Update utility displays.



Show Installed Updates – Select to display the list of installed updates on the server.

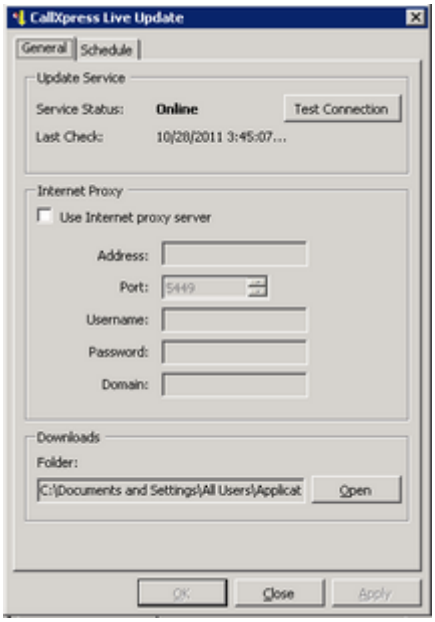
Check for Updates button – Click **Check for Updates** to connect with the Live Update Server and check for new software updates. If an update is available, it displays in the Available Updates area of the window. A short description of the update displays in the Details area of the window.

NOTE If multiple updates are available, highlight an update to view its description.

Update button – The Update button is grayed out unless an update is available. Click **Update** to begin the update installation process.

Options button – Click **Options** to configure an Internet proxy, a schedule, e-mail notification, or test the connection to the SUS. The Live Update dialog box displays the General tab.

General Tab



Update Service

Service Status – Displays the Service status found during the last check

Last Check – Displays the date and time of the last Service check

Test Connection – Click **Test Connection** to test the connection between the Telephony Server and the Update Server

Internet Proxy

Use Internet proxy server - Select this box if the connection to the update Server requires a proxy server

Address – Enter the IP Address or server name of the proxy server

Port – Enter the port number to connect to the proxy server. The default port number is 5449.

Username – Enter the user account name to log on to the proxy server

Password – Enter the user's password

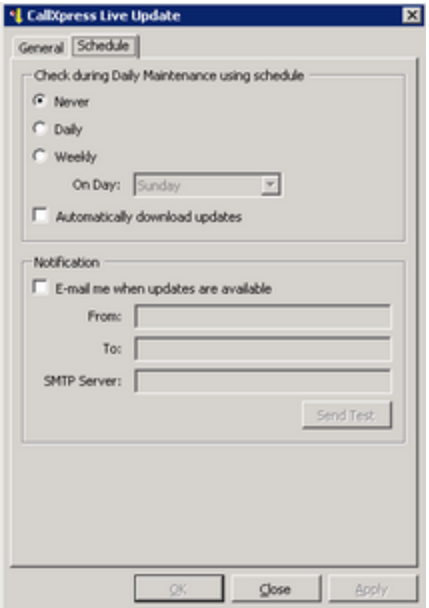
Domain – Enter the domain name of which the proxy server is a member

Downloads

Folder – Displays the default location in which the software updates are downloaded

Open – Click Open to display the folder in Explorer view or to change folders

Schedule Tab



Check during Daily Maintenance using schedule

Never – Select **Never** if you do not want to use the automatic update service

Daily – Select **Daily** if you want the server to check daily for updates during Daily Maintenance

Weekly – Select **Weekly** if you want the server to check weekly for updates during Daily Maintenance, and then select the day you want the server to check for updates from the list.

Automatically download updates –Select to download updates automatically if available

Notification

E-mail me when updates are available – Select this box if you want the server to send an e-mail when updates are available.

From – Enter the sender's valid e-mail address

To – Enter the recipient's valid e-mail address. Separate multiple addresses with a semi-colon.

SMTP Server - Enter the FQDN of the SMTP Server

Send Test – Click **Send Test** to verify the notification settings.

Configuring the DailyMaintUser.bat file

When you configure the Live Update utility to run on a daily or weekly basis the system creates the DailyMaintUser.bat file automatically. If the DailyMaintUser.bat file already exists, a line is added to the existing batch file to run the software update service based on the schedule you created on the Schedule tab. The executable file, AT_SoftwareUpdate.exe starts the software update. This file is located in the CX\Bin directory. In addition, there are two command line arguments you can add manually to the executable in the DailyMaintUser.bat file:

- -silent - Instructs the application to run windowless
- -quiet - Instructs the application to run windowless during startup. If updates are available, the application displays an icon in the system tray and generates pop-up notification message.

Configuring the Utility to Start at Logon on Windows Server 2008 R2 Servers

You must manually configure Windows Server 2008 R2 servers to run the Live Update utility at user log on. The User Account Control (UAC) restrictions on Windows Server 2008 servers blocks the program from starting by default. To start the Live Update utility at user log on you must configure Task Scheduler. You must be logged on as an administrator to configure Task Scheduler.

To configure Task Scheduler…

1. From the Task bar select, **Start**, type **Task Scheduler** in the Start Search box, and then press **Enter**. The Task Scheduler window displays.
2. On the menu bar click **Action**, and then click **New Task**.

- In the Begin the task box of the Triggers tab select, At Log on.
- In the Action box of the Actions tab select, Start a program.
- In the Settings | Program script box of the Actions tab, type the path or click Browse to locate the Drive\CX\Bin\AT_SoftwareUpdate.exe file. The default path is D:\CX\Bin\AT_SoftwareUpdate.exe.
- To run the utility without opening a window, add the –quiet switch to the end of the path. For example, D:\CX\Bin\AT_SoftwareUpdate.exe –quiet.

For more information on configuring Task Scheduler, press F1 for help while in Task Scheduler.

Glossary

Access rights: Permission granted by a system's administrators to perform tasks such as adding, editing, or deleting mailboxes

AMIS: *see* Audio Messaging Interchange Specification

ANI: *see* automatic number identification

Answer Mode table: a set of configurable instructions that determine which mailbox on a Call Server initially receives control of an incoming call

Application: a system of mailboxes and other settings that controls how the Call Server and the telephone system work together to process calls

Audio format: the combination of encoding methods used to convert an audio signal to digital information

Audio Messaging Interchange Specification: an industry standard that allows voice messaging systems from different manufacturers to exchange messages

Automatic number identification: a series of digits or a data packet that accompanies a telephone call and communicates the caller's telephone number

Blind transfer: a transfer type in which the Call Server dials the caller's destination telephone number and releases the call immediately; see also confirmed transfer, monitored transfer, supervised transfer, and transfer type

Call Processor: a mailbox that takes incoming calls and presents callers with a menu of options. Call Processor mailboxes contain at least three elements: a set of recorded announcements, a set of definable actions that allow callers to select an action by pressing specific DTMF keys, a set of definable actions that allow callers to select an action by speech commands, and mailbox settings that specify how the Call Processor operates and interacts with other mailboxes in the system

Caller: a person who places a call to a telephone system; see also subscriber

Callout: an outbound call placed by a subscriber or by the Call Server. The Call Server makes callouts to deliver daily message reminders, immediate message notification, and messages from outbound, AMIS networking, and fax delivery mailboxes.

Mailbox COS: a pre-designed set of configurations that can be applied to any Subscriber mailbox

Client utilities: programs that an administrator uses to configure and manage the System Server

Confirmed transfer: a transfer type in which the Call Server dials the caller's destination telephone number and requires the answering party to accept the call by pressing 1 before it releases the call. See also blind transfer, monitored transfer, supervised transfer, and transfer type

Dial plan or dialing plan: a set of rules in place on a Call Server or telephone switch that evaluates and classifies dialed telephone numbers to determine whether each dialed number is valid, whether the subscriber is allowed to make a call of this type, and how the number should be dialed.

Extended Simple Mail Transfer Protocol (ESMTP): an enhanced version of the basic e-mail protocol for TCP/IP. One of the enhancements is VPIM, which in turn makes digital networking possible

Extension Specific Processing (ESP): a Call Processor mailbox that is initiated from a Subscriber mailbox and can add options to the normal messaging options available in a Subscriber mailbox

Global user administration: a feature that makes it possible to examine and change mailboxes and certain configuration elements on several System Server platforms simultaneously from one location

Incomplete transfer: a condition in which the Call Server has attempted to transfer a caller to a device but no connection occurred. The Subscriber Msg Call Processor action also registers as an incomplete transfer

Integration: A specification, supplied with the Call Server, that describes how to connect that server to the telephone system and program both so that they exchange as much information as possible about the calls they handle

Internet Message Access Protocol (IMAP): A messaging standard supported by a number of different Internet e-mail server and client programs

Lightweight Directory Access Protocol (LDAP): an industry standard for making user directory information available on a LAN

Mailbox range: *see* range

Message-waiting indicator (MWI): an indicator light, stuttered dial tone, or display used to notify subscribers of new messages

Messaging application: *see* application

Management info base (MIB): a text file containing information that an SNMP management console uses to communicate with an SNMP management agent

Monitored transfer: a transfer type in which the Call Server dials the caller's destination telephone number and waits to detect ring tone before it releases the call; if it detects busy or reorder tone, the server pulls back the call and takes a message. See also blind transfer, confirmed transfer, supervised transfer, and transfer type

Override: an auxiliary entry in the answer mode table that allows administrators to use the telephone to redirect incoming telephone calls to a special Call Processor mailbox

Personal identification number: a numeric password required for security reasons

PIN: *see* personal identification number

Prompt: a factory-installed Call Server message such as "Please enter your security code"; a prompt set (or language prompt set) is the whole set of factory default system announcements in a particular language, such as Female North American English

Propagation: the automatic exchange of system configuration and mailbox information between System Servers participating in a digital messaging network

Public switched telephone network (PSTN): the worldwide network of telephone switches and other devices through which telephone service is provided

Queuing: keeping one or more callers on hold, in the order the call is received, until a subscriber becomes available to take their calls

Range: a set of mailboxes whose mailbox numbers fall between a defined upper and lower limit

Route code: a rule that adds defined values to the mailbox numbers specified in the answer mode table for calls that meet certain criteria, thus directing those calls to a different mailbox

Service type: in route codes, the type of identification service that the Call Server should assume is present on an incoming call

Simple Network Management Protocol (SNMP): an industry standard protocol for monitoring and managing networked computer platforms

Short Message Service (SMS): an industry-standard method of transmitting short text messages to a subscriber's mobile telephone, pager, or other device for immediate display

Subscriber: The user of a specific telephone instrument or a Subscriber mailbox on the system; see also caller

Supervised transfer: a transfer type in which the Call Server dials the caller's destination telephone number and waits for the answering party to go offhook before it releases the call; referred to in the UM8700 software simply as "Transfer." See also blind transfer, confirmed transfer, monitored transfer, and transfer type

System broadcast message: a voice message played to all subscribers just after they enter their mailbox numbers and security codes, typically used to notify subscribers of system changes or to alert them to the need to shut down the Call Server for system maintenance

TCP/IP: *see* Transmission Control Protocol / Internet Protocol

Telephone user interface: (TUI) the system of voice menus, DTMF commands, and prompts that a caller or a subscriber hears while interacting with the Call Server over the telephone

Telephony Server platform: the computer hardware on which the System Server and Call Server software runs

Telephony Server: the combined System Server/Call Server set of hardware and software that handles telephone calls, voice messages, and audio recordings in a UM8700 system

Text-to-speech: a program that accepts strings of computer text and generates synthetic speech to read the text aloud

Transfer type: the method that the Call Server uses to transfer calls; see also blind transfer, confirmed transfer, monitored transfer, and supervised transfer

Transmission Control Protocol / Internet Protocol: a set of specifications, and a resulting set of data networking protocols that support the Internet and a wide range of smaller networks

Trunk-to-trunk transfer: the process of transferring one party to another by connecting the two trunk lines they are using

TTS: *see* text-to-speech

T-type transfer: see supervised transfer

TUI: *see* telephone user interface

Unified Messaging: the term used to describe the management of all of a subscriber's voice, fax, and e-mail messages by telephone or through the subscriber's E-mail Inbox

User ID: an account name that identifies an individual as a valid Telephony Server administrator

Utilities: *see* client utilities

Voice Intercept Messaging (VIM): a service that allows subscribers to divert incoming calls to a variety of destinations, available on Aastra MX-ONE telephone systems only

VPIM: Voice Profile for Internet Mail, a specification for encoding audio recordings as long strings of plain text, which makes digital networking possible