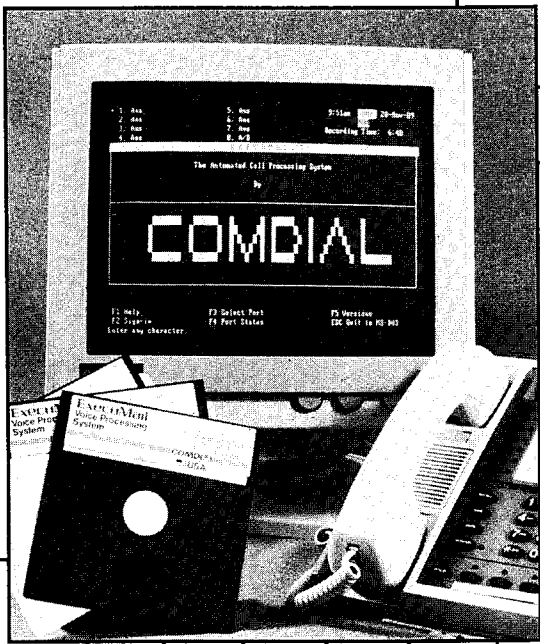


ExecuMail

Voice Processing System

Learning ExecuMail
Version 6.5
Com:044

1



Learning ExecuMail[®]

Version 6.5

COMDIAL
Made right in the USA

Learning ExecuMail Manual V6.5
First Edition April 1994
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Charlottesville, Virginia
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Introduction

Congratulations, you have chosen an excellent voice processing system to handle your voice mail and automatic call routing needs: ExecuMail. ExecuMail is a powerful yet **easy-to-use** system. This *Learning ExecuMail* guide is designed to help you as a system manager learn how the system operates and how you can tap its state-of-the-art features.

Using This Guide

Whether you are a new system manager or customer service representative, take a few minutes to read this guide, follow the lessons, and learn how to get the best use out of the voice mail system. This guide consists of three main sections:

- n An *Introduction* which outlines this guide and describes the roles of the people working with the system — the ExecuMail team.
- n A series of *System Manager Lessons* which consists of five easy, **hands-on** lessons covering the basic tasks a system manager handles. In just a few hours, you'll gain an understanding of how to operate the voice mail system, both by phone and at the system's console.
- n An outline for *Training Others* which covers how to train other system managers, receptionists, and end users. This section will help you share your knowledge with other members of the ExecuMail team and includes a sample training memo which you can modify or use as is to introduce the system to users, once it is installed.

By the time you have finished this guide, you'll be able to answer user questions about the system, conduct a demonstration of the system — both by phone and at the system console — and will be quite familiar with the system's basic operations.

The ExecuMail Team

Teamwork is the key to a successful installation. This guide, *Learning ExecuMail*, can help you ensure that all the members of the team understand the product and how it can help them in their day-to-day work. The team consists of the installer, the system manager, the operator/receptionist, and the system subscribers.

The ExecuMail Installer

The installer is responsible for the initial installation and configuration of the system. The installer helps oversee the entire training process at a customer site,

providing initial training for the company's system manager, operator, and subscribers. The installer can also provide ongoing support when the time comes to expand the system or its features.

The System Manager

The system manager (or managers; you can have more than one), is responsible for the day-to-day operation and maintenance of the voice mail system. The system manager uses the system console (the keyboard and monitor) to add or delete subscribers from the system, update subscriber options, and perform backups or other routine tasks. The system manager also answers users' questions, trains new subscribers, and acts as the contact person for both system users and the installer.

While this may seem like a lot to do, it actually takes very little time. The system's ease of use makes the system manager's job a breeze.

Most companies will have their own system manager **on-site**, but in some cases the installer or the installer's customer service representative will also act as a site's system manager.

The Operator/Receptionist

The operator or receptionist at a site talks to more callers and end users than any other person in the company. Thus, this person's opinion and understanding of the voice mail system can have a tremendous influence on the acceptance and effectiveness of the voice mail system at a new site. ExecuMail can lighten the workload of a company's receptionists, allowing them to provide better, more professional service to those callers who need more assistance. The operator or receptionist can also answer many user questions that might otherwise have to wait for the system manager and can provide a seamless interface to the system's voice mail, call routing, and fax handling capabilities. The operator is an integral part of the ExecuMail team.

The Subscribers

Even the best voice mail system cannot be effective if the end user does not understand how to use it. ExecuMail's *1 for Yes, 2 for No* conversation makes it easy for both subscribers and outside callers to use the system. Still, to make full use of the system, subscribers can often benefit from extra training in the powerful features ExecuMail offers. This can best be done through ExecuMail's *User's Guide* and a brief group training or demonstration by the system manager or installer.

Once subscribers become familiar with ExecuMail's features, they may want to use the system's menu mode conversation. The menu mode conversation can replace the system's yes-and-no conversation with special quick option menus. While this guide focuses on the system's *1 for Yes, 2 for No* conversation, later in this guide you'll also learn how to set subscribers to hear menus, if they prefer.

The Training Process

ExecuMail is extremely easy to use, but any new product requires training. ExecuMail is a product used by the entire company, just like the Comdial telephone system.

This guide outlines a training process to ensure that the training after installation is complete and that all users are satisfied. ExecuMail is most effective when it is well accepted and appreciated by everyone in the company. By becoming thoroughly familiar with the product yourself, you can more effectively train others on the team.

Using the Checklists

Before you can start learning ExecuMail yourself, the system must be installed and operating. You should go over the items on the Installer Checklist with the person installing your system to make sure the system is fully prepared.

If you are a new system manager who will be operating your new ExecuMail system, use the System Manager Checklist to identify the steps you should take to learn how to use ExecuMail and introduce it to others in your company.



Installer Checklist

- Assemble and install the system according to the instructions in the *Installation Manual*.
- Complete the QuickStart Application Worksheets.
- Add subscribers, groups, and other initial configuration information (from the worksheets).
- Test the basic functions of the system.
- Introduce the system manager to the system.
- Go over with the system manager the system documentation, the system manager lessons in this guide, and discuss the options for training the subscribers.



System Manager Checklist

- Complete all of the system manager lessons in this guide.
- c/* Determine the training method that will work best for your subscribers.
- Prepare and distribute the training memo.
- c/* Leave a “test” message to each subscriber as described in the memo.
- q* Contact users who do not reply to the “test” message. Answer questions and encourage them to use the system.
- c/* During the first week leave additional messages to subscribers encouraging them to ask questions about the system.
- Send a follow-up memo.
- q* Make Guest Request Forms available.

System Manager Lessons

For most people, ExecuMail *is* the voice heard on the telephone. This is the voice that politely and quickly answers and directs calls and efficiently takes and delivers messages. This unobtrusive ease of use from a caller's point of view is the result of thoughtful design and years of refinement.

Behind this friendly voice lies a sophisticated computer program. This part of ExecuMail is accessible only from the console (the system video display plus the keyboard). Regular users-called subscribers-never see this part of the system. It is available only to a special kind of subscriber, called the **system manager**. The system manager is the person who uses the console to enter and maintain the information the voice mail system needs for processing calls and controlling operations.

While ExecuMail is sophisticated, it is not complicated-the screens and controls are well organized and easy to use. By following the 5 easy lessons in this section, you can become a skilled system manager in only a few hours.

In these lessons, you'll explore and use the system "hands on," learning how to control its operation and its interaction with callers. You'll use the system both from the console, as a system manager, and from the telephone, calling as a subscriber, guest, and as an outside caller. You'll also learn how to **fine-tune** and enhance system operation as needed.

The lessons are complete. Only technical details that are the responsibility of your installer have been left out. (These details are in other parts of the system documentation however, if you should ever need them.)

We've kept things simple, too. The lessons don't make assumptions about your level of computer skills. **Everything you need to know** is covered, step by step.

Lesson Organization

To help you learn and retain your new skills quickly and painlessly, lessons are in a "discuss-do-review" format. First, we start each lesson by discussing what you can expect to learn. Next comes the hands-on part of the lesson with **step-by-step** instructions. Each lesson ends with a short review of the topics discussed and new terms defined. For best results, be sure you are familiar with each topic and term before you continue.

Along with the topic review, we give cross-references to other parts of the system manuals that also cover what you have just learned. When you complete a

lesson, browse through this material. The better you know the documentation for the voice mail system, the better you'll be able to take advantage of the system's many features and options.

Learning on a Live System

If you'll be training on the voice mail system as it answers your calls, you might be concerned about the effect your training could have on normal call processing operations.

Training won't hamper normal activity. You can complete training *while* the system answers and processes calls. In fact, lessons 1 and 2 don't change anything on the system at all—you'll only tour screens and test commands. And while lessons 3, 4, and 5 do add sample data to your system, these samples are designed to avoid conflicts or interference. Don't worry about "breaking" anything, either. The system carefully protects its voice messages and other stored information.

Once you complete the lessons, you'll find easy, **step-by-step** instructions for removing all samples, so that you can quickly return the system to its original state.

Before You Start the First Lesson

Before you start the lessons in this guide, the system must be installed and working. Your installer must have already installed the voice mail system and connected it to the Comdial telephone system. This doesn't mean that the voice mail system must actually be in use in your organization, but it must be *ready* to use. An Installer Checklist appears on page 4. You can go over this checklist with your installer to be sure your system is ready to use. You'll also need:

- A telephone near the system console that you can use to call the system.
- n The number to dial in order to call the system directly.

If you don't have a telephone available at the computer or you don't know how to call the system, ask your installer for assistance.

If you do have the telephone and number, you are ready to go. In a few minutes, you'll learn how to start the system (if it is now off), and learn how to make sure everything is working properly.

What You'll Accomplish

These 5 lessons will give you a thorough understanding of:

- n How the system answers and routes calls.
- n How it takes and delivers messages.
- n How to teach subscribers to use the system.
- n How to add or remove subscribers or change their message options.

The first lesson takes about 30 minutes to finish; the remaining lessons take about an hour each. While you may complete these lessons at any comfortable pace, take breaks after lessons 2, 3, and 4. Ideally, try to complete the lessons over a two or three day period. Allow time to review each lesson before you continue

with the next. Once you have completed lesson 5, you'll have learned everything you need to use the system right away.

Lesson Goals

Lesson 1 is a quick introduction to the system. Here, you'll learn how to start, stop, and restart the system, how to sign in and out at the console, and how to move through the system's screens. You'll also learn your duties as system manager.

Lesson 2 shows you how the voice mail system is organized. This material will give you an overview of the entire system. You'll understand where to look for a particular feature, option, or function. As part of the overview, you'll learn about each of the system's different screens in detail.

Lesson 3 will teach you the ins and outs of adding subscribers and guests to the system. In the process, you'll learn how to review, record, and change various system prompts, names, and greetings. You'll practice adding subscribers and learn how to control call transfer and message delivery.

Lesson 4 teaches you how to use the system from a subscriber's point of view. You'll practice leaving and retrieving messages. You'll learn how to review and redirect messages, and how to cancel an undelivered message. Finally, you'll learn how a subscriber uses setup options to record his or her name and personal greetings by phone.

Lesson 5 teaches you how to place subscribers into message groups to speed delivering the same message to several people at once. As you continue with your "subscriber" practice by leaving and retrieving group messages, you'll learn how to pause, rewind, and fast forward through messages and use other touchtone controls. You'll also learn how a subscriber sets and uses a security code and how you, as system manager, can delete a forgotten security code.

Lesson 1: The Screens & Keyboard

This first lesson is a quick, hands-on introduction to the voice mail system's screens and commands. (It is also a good, quick refresher if you have not used the system for a while.) You'll tour the system without doing anything that will change existing settings or information.

Here, you'll learn how to sign in and out of the system at the console and you'll learn to move from screen to screen. We'll define your role as a system manager and touch upon the division of duties between you (as system manager) and your installer.

Using the System Keyboard

You'll soon be starting the hands-on part of the training lessons. Here's the format we'll use for typed instructions:

Key Names

When you see a word in a shadowed box, it represents a key or combination of keys on the console keyboard. For example, ←Enter refers to the key labeled "Enter" on the keyboard.

Sometimes we'll show a combination of two or more keys separated by hyphens, Ctrl-S, for example. This means, press *and hold* the Ctrl key and then press the S key. After you press S, release both keys together.

We don't use the boxed key symbols for every **keystroke**—this would be hard to read. But we *will* use the symbols to distinguish between typing the letters of a word, "Enter" for instance, and pressing a single key, ←Enter.

Typing Your Response

We'll use two simple "direction" words, *type* and *press*, to tell you what to type on the keyboard or dial on the telephone. For example:

Type: 866 [-Enter]

This means that you would type "866" on the keyboard and then press the ←Enter key. The words and letters we want you to type are printed in a typewriterstyle typeface for added clarity. Type your response as shown—match uppercase and lowercase letters exactly.

“Press” refers either to a single-key action at the keyboard or one or more touchtones on your telephone. For example:

Press: 



Press : 1


In the first instance, you would press a single key on the keyboard. In the second, you would press it on the telephone keypad, as indicated by the small picture of a telephone.

Finally, when you type, don't use “1” (lowercase letter “L”) for the number one (“1”) or “O” (uppercase letter “o”) for zero (“0”). While these characters look similar in print, they are not interchangeable on the keyboard: they won't work. (When the distinction is not clear on the page, we'll specify number or letter.)

Following the Results of Your Actions

Along with “type” and “press,” we'll use a special two-column format for stepbystep instructions. The left column will show you what to press or **type** and the right column will show what you'll see on-screen or hear on the telephone. Think of the left column as the “action” you are to perform and the right column as the corresponding “result.” For example:

ACTION	RESULT
Press: 	Please enter your ID:
Press  : 1	“I'll record your message now. ”

In the first example, you would see the words “Please enter your ID” appear on the console screen immediately after you press . In the second example, you would hear “I'll record your message now” on the telephone immediately after you pressed “1” on the telephone keypad. As you do the training, use the right “results” column to confirm that you are proceeding properly.

How to Start or Restart ExecuMail

ExecuMail is a full-time, dedicated system. The software uses the system *100%* of the time. You'll not do anything else (like word processing) with the voice mail computer. Except in special circumstances, it will remain on and active, answering and processing calls, 24 hours a day. As such, the system computer, monitor, (and printer if one is part of the system) *should never be switched off*:

When you sit down at the console, the system should be on and active. You should see either the system “Banner” screen showing the system logo or the words AWAITING A KEY on an otherwise empty screen. If you see the Banner screen or the AWAITING A KEY message, skip ahead to the next topic heading.

Otherwise, if the system is turned on but the voice mail software is not running, you need to restart the system. (Don't restart the system if the software is already running.) Here's how:

Press: --

Press the 3 keys simultaneously. This usually takes both hands. (It is hard to do, so that you won't do it accidentally.) Once you press the keys, it might take a second or two before you see any activity.

This combination of keys restarts (or "reboots") the system. Restarting the system reloads and restarts the software programs used by the system. Restarting ensures that the system tests and reloads itself in the correct sequence. The restart sequence can take several minutes to complete, depending on your particular installation.

On rare occasions, the system might not respond or might stop working properly (we'll discuss how to see if this has happened, below). The **Ctrl-Alt-Del** restart sequence is usually all you need to get the system back into operation.

NOTE: If the system computer is switched off, contact your installer. This might mean the system installation is not complete. You might still be able to train on the system computer, but you'll need to check with your installer to ensure that doing so won't interfere with the installation process or normal telephone operations.

Awaiting a Key



AWAITING A **KEY**

Generally, when you sit down at the console, the system will be turned on and active. However, the screen will probably be *blank* except for the message AWAITING A KEY. This is normal. Since the system is always on, it includes a feature that prolongs the life of the monitor. After a few minutes of keyboard inactivity, the system clears the full screen and displays this short message instead. The message itself changes screen position *every* few minutes.

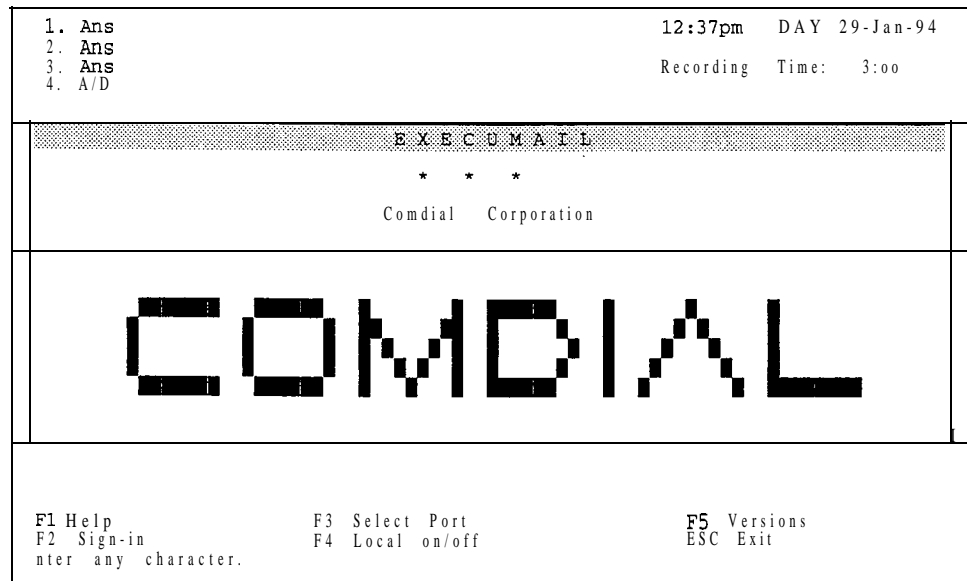
The AWAITING A KEY message will disappear and the screen will return to normal with the first key press. Try it now...

Press: **↵Enter**

The Banner Screen is shown.

NOTE: As you use these lessons, the system may clear the screen and show AWAITING A KEY. This will happen if you pause to read or attend to something else for more than a couple of minutes. When this happens, just press any key before you resume the lesson instructions.

The Banner Screen



The Banner Screen is shown whenever the system is active but secured (and the screen protection feature has not cleared the screen). Here is where you sign in to the voice mail system to perform your system manager duties.

The Banner Screen has many important status and activity indicators on it. Let's review them:

Ports available and port status: The upper-left corner of the Banner Screen shows port numbers (1, 2, and so on) along with an abbreviation stating current port status (**Ans** meaning "ready to answer," for example). These indicators change while calls are answered and processed. If your system is processing calls as you train, you have probably seen these indicators change. **Port** simply means a single incoming telephone line answered by the system. The number of available ports helps to define the "size" of your system. This can range from 2 to 16 ports.

Earlier, we mentioned a quick test you can use to make sure the system is working. Simply dial the voice mail system and see if it answers your call. Use the telephone near the console and try it now...

Press **☎**: {dial the number for "Hello, this is..." your system}

Your system should answer within a few rings. If you watch the port status area, you'll see a RINGING indicator followed by DAY **ANSWER** (or NIGHT ANSWER, if you are working after hours) as your call is answered.

To disconnect...

Press =:***and hang up the telephone.

Date, time, and answering status: These indicators are in the upper-right corner of the Banner Screen. The date and time shown are from the system's internal clock and calendar. The voice mail system uses these to time and datestamp

messages. For best results, they should be accurate. You can change the system date and time within ExecuMail. We'll show you how in the next lesson. The answering status indicator shows either DAY or NIGHT depending on whether the system is answering with its daytime or nighttime greeting. This is determined by the Day Mode schedules you set within the system. These will be covered in the next lesson, as well.

Keylock status: Just below the date and time, is an area that shows whether or not the **CapsLock**, **Num Lock**, or **Insert** keys have been pressed on the console keyboard. When set on, **CAPS** keeps all letters UPPERCASE, **NUM** enables the keyboard 10-key pad, and **INSERT** means that typed characters will be *inserted* into a line (rather than typing over the existing characters). These keys may or may not be pressed on your keyboard. Try them now so you can see the status indicators on the screen:

Press: Num Lock	NUM indicator toggles on or off.
Press: CapsLock	CAPS indicator toggles on or off.
Press: [Insert]	INSERT indicator toggles on or off.

Try these keys several times. Leave them *OFF* when you finish.

Recording time: Messages are recorded digitally on the system's internal hard disk drive. Once heard, messages are erased after a predetermined period. The recording time indicator shows the number of hours and minutes available for new messages. (For example, 5 : 24 = 5 hours, 24 minutes of storage time available.) Depending on your equipment, the total time available for message storage can range from a few hours to dozens of hours. Your installer has helped select the best-sized system for your organization. Watching this number grow and shrink over time will give you a feeling for how much recording time is "normal." If your organization grows, and this number starts to drop dramatically, your installer can quickly help you expand recording capacity.

Banner logo: Your installer may have customized this area of the screen with your logo instead of the system logo. As a result, this area might not match the screen shown on page 12.

Available Function Keys: Along the bottom of the Banner Screen, there is a list of keys showing functions currently available. These correspond to the keys labeled "F1" through "F5" on your keyboard. For example, pressing **F1** gives you **on-screen** help. Different screens have different combinations of functions, but the ones available are listed here. Try this yourself:

Press: F5	Software version information is shown. PRESS ANY KEY TO CONTINUE
------------------	---

Version numbers can be important for telephone support by your installer. If you are asked what "version" of voice mail software you are using, look here.

Press: ←Enter	Software version information clears.
----------------------	--------------------------------------

Press: F1	Help for the Banner Screen is shown.
------------------	--------------------------------------

The help system gives a summary for each system screen. Use the **↑** **↓** **PgUp** and **PgDn** keys to review help. Try it now...

- Press: **[PgDn]** More help for the Banner Screen is shown.
- Press: **[↓][↓]** Two more lines of help for the Banner Screen are shown.
- Press: **[PgUp]** Move back one screen-full of help.
- Press: **[↑][↑]** Move back two lines of help.
- Press: **[Esc]** Help information clears.

You'll sign in with **[F2]** in just a minute. You'll learn to use **[F3]** and **[F4]** in the next lesson.

One-line help: At the bottom of the screen, immediately below the function key list, is a one-line typing help indicator. This tells you what the system expects you to type. It now reads `Enter any character`. The system will accept anything you type. As you enter information in the system, watch this area for quick reminders.

Subscribers, Guests, and Outside Callers

Let's define some terms we'll be using frequently in the rest of these lessons:

The term **subscriber** refers to all enrolled *users* of the voice mail system. **Enrolled** means that the user's name, extension number, and other information have been entered in the system. This term encompasses regular subscribers and system managers. Nonsubscribers—customers, clients, and friends who telephone your organization—are called *outside callers*.

A **guest** is a person who is hosted by a particular subscriber. A guest is given a "guest mailbox" and very limited system privileges. For example, a client who calls frequently could be assigned as a guest of one of the staff. Unlike an outside caller, a guest can leave and *receive* private messages from his or her host subscriber. Guest privileges give a person **two-way** communication on the system, but only with the host staff member. When a system feature is available to guests as well as subscribers, we'll mention "subscribers and guests" explicitly. You'll create sample guests in Lesson 3.

Signing In to the System

The voice mail system protects its operations and data from casual "browsers" with a system of **Personal IDs**. This applies to both the console and the telephone. Each subscriber and guest uses his or her Personal ID to retrieve messages and perform other tasks by phone.

As a system manager, you'll use your Personal ID to enter the system from the console keyboard as well. As shipped, the system contains a sample system manager named "Thomas Jefferson" whose Personal ID is "TOM" (or "866"). At the Banner Screen, **[F2]** is the command you use to sign in. Sign in as Thomas:

Press: **[F2]** Please enter your ID:

Type: TOM **QuickStart** APPLICATION Page 1 is shown.
or type: 866

That's all there is to signing in as system manager! Since signing-in is easy, remember to change your Personal ID regularly to protect system security.

NOTE: If you cannot sign in, your installer or another system manager may have removed or edited Thomas Jefferson. If you cannot sign in as Thomas, use your actual Personal ID or contact your installer for a System ID to use for training. While we'll be adding our own sample system manager later in the lessons, you'll need a substitute for Thomas Jefferson for now.

We'll finish this lesson by taking you on a brief tour of the system screens. First, it is important to learn how to sign out.

Press: Are you sure you want to sign out to the banner screen? (Y/N):

To confirm your intentions...

Press: The Banner Screen is shown.

At the Banner Screen, also signals that you want to "exit the system." Exiting stops call processing-no calls are answered. (All messages stored on the system are saved.) While the system software should normally be left running, as system manager you'll need to exit the system from time to time. For example, you'll have to exit the system in order to make backup copies of the system software and files. Of course, you should shut down call processing at an announced time, when it will cause little or no disruption.

To keep an unauthorized person from exiting the system and shutting down call processing, the system always asks for the system manager password before exiting. Like signing out, asking to exit gives you a chance to change your mind. Try it now...

Press: Are you sure you want to exit AND DISCONNECT ALL LINES? (Y/N):

Press: To exit, please type your ID:

Let's not exit the system for now, so as to keep **processing** calls...

Press: The password message clears.

If you do shut down the system (accidentally or intentionally), press the key combination to restart the system.

Overall, it is a good idea to protect the system by placing the console in a restricted area. Don't try to limit access by unplugging the keyboard. Doing this **will often** make the system stop working. Even if the system continues to run, the keyboard will probably not work when plugged back in. In either case, you'll be forced to restart the system.

As an added security feature, the system automatically signs you out if there is no keyboard activity for several minutes. This protects the system if you forget to sign out or if you are distracted by a long interruption.

This feature is great when it works as anticipated, but since you'll be pausing to read as you use these lessons, you might find yourself unexpectedly signed out on occasion. Automatic sign out takes place in two stages. First, after a few minutes of inactivity, the screen will display a sign-out confirmation message:

Are you sure you want to Sign
out to the banner screen? (Y/N):

Simply press **Enter** to clear the message and continue. If the confirmation remains unanswered for several more minutes, the system secures itself and returns to the Banner Screen. If this happens, just sign yourself back in (using **F2** and your Personal ID), then return to the correct screen before you continue the lesson instructions.

Screen Tour

Let's take a short tour of the different system screens. With this tour, you'll learn how the screens are organized and which commands help you move from screen to screen. At the Banner Screen, sign back in as Thomas Jefferson:

Press: **F2** Please enter your ID:
Type: TOM **Enter** **QuickStart** APPLICATION Page 1
or type: 866 **Enter** is shown.

The voice mail system is organized around 6 information screens. Each screen contains one or more *pages* of information. Simple commands let you move from screen to screen and from page to page within a given screen. Figure 1 on page 17 will give you a feel for the system organization.

From the illustration, you can see the 6 screen names: **QuickStart** Application Screen, Personal Directory Screen, Groups Screen, Transaction Directory Screen, Voice Prompt Editor Screen, and **QuickStart** Switch Setup Screen.

The **F5** Previous Screen, and **F6** Next screen commands let you move from screen to screen. You can think of **F5** as moving "backwards" through the screens and **F6** moving "forward," relative to your current position. In a way, the screens are really in a kind of *circular* arrangement, since, if you press either **F5** or **F6** six times in a row, you'll be right back at the screen you started from.

Try these commands yourself starting from the **QuickStart** Application Screen...

Press: **F6** PERSONAL **DIRECTORY** is shown.

This is the first page of the subscriber and guest directory. There **will** be one page for each person enrolled in the system. By default, the system keeps this list in

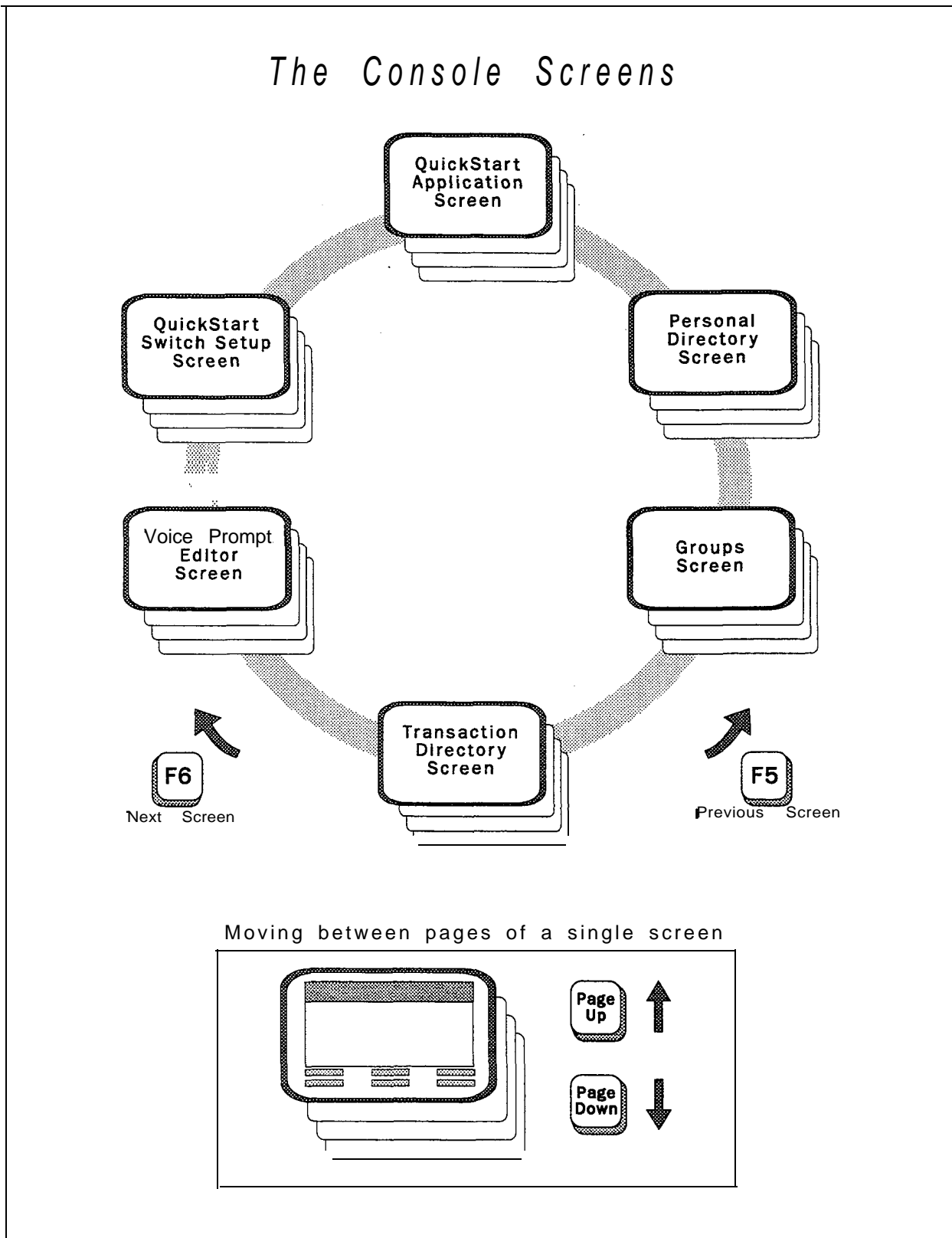


Figure 1: Screen Organization

alphabetical order by last name, so you'll see the directory page for the first person, alphabetically, in your organization. We'll discuss line-by-line details of this and other screens in the next lesson. For now, just concentrate on the overall screen organization.

NOTE: You may see a subscriber who has a name that begins with a letter (like **JPD**) or an extension number in brackets (like **{100}**). These occur when a subscriber enrolls him- or herself by phone or when you have extra subscriber mailboxes on the system. We'll discuss how subscribers and guests are added in Lesson 3.

Press: **F6** GROUPS is shown.

Subscribers (and guests, in certain cases) can be put in "message groups" to speed delivering the same message to many related people. For example, you could have a message group called "Everybody." Sending a single message to this group would deliver it to everyone in your organization. Message groups typically mirror your organization by department.

Message groups can be added by phone by subscribers, or the system manager can add message groups at the system console. In either case, message groups are sorted by group name or number. The system has options that let you choose who can leave group messages and how messages are delivered to group members. In Lesson 5, you'll create sample message groups by phone and at the system console and you'll learn about group options.

Press: **F6** TRANSACTION DIRECTORY is shown.

Transaction boxes let the system route certain kinds of calls, and collect and distribute information from and to callers. Transaction boxes give the system a wide range of uses. This feature is discussed in the *Reference Manual*.

Press: **F6** VOICE PROMPT EDITOR is shown.

This screen lets you review and modify the recorded prompts that the system uses to create its "conversation" with callers. On this first page, you can see some of the recordings used in conversations. In later lessons, you'll learn how to review and modify these recordings as desired.

Press: **F6** **QuickStart SWITCH SETUP**
Page 1 of 3 is shown.

The Switch Setup Screen contains 3 pages of technical settings that let the voice mail system communicate with your particular Comdial telephone system. Your installer may have already selected the correct Comdial telephone system and made any fine-tuning adjustments.

You have moved forward through all 6 screens. If you were to press **F6** once again, you would return to the QuickStart Application Screen. As practice though, use **F5** to move backward to where you started...

Press: **F5** VOICE PROMPT EDITOR is shown.
 Press: **F5** TRANSACTION **DIRECTORY** is shown.
 Press: **F5** GROUPS is shown.
 Press: **F5** PERSONAL **DIRECTORY** is shown.
 Press: **F5** **QuickStart** APPLICATION Page 1 is shown.

Unlike the **F5** and **F6** keys, the **PgDn** and **PgUp** keys move through the pages of a particular screen. For example, the QuickStart Application Screen has 6 pages that control how the system answers and processes calls. (If your system has an optional feature package installed, you may have more than 6 QuickStart

PgDn **PgDn** {slowly, please}

QuickStart APPLICATION Page 3 through **QuickStart** APPLICATION Page 6 are shown.

Finally, move back up a page...

Press: **PgUp** **QuickStart** APPLICATION Page 5 is shown.

Screen Shortcut Keys

Since there are only a few different types of screens, you can move quickly through the system using the **F5** and **F6** keys. However, there is also a shortcut to move directly to a particular screen as desired:

Press: **Ctrl-G** **GROUPS** is shown.

This shortcut method lets you jump directly to a given screen. The letter combinations are:

Ctrl-A QuickStart Application	Ctrl-T Transaction Directory
Ctrl-D Personal Directory	Ctrl-P Voice Prompt Editor
Ctrl-G u p s	Ctrl-S QuickStart Switch Setup

You'll jump to the Personal Directory most often. Try it now...

Press: **Ctrl-D** PERSONAL DIRECTORY is shown.

The Role of a System Manager

Earlier, we said the system manager is the person who **enters** and maintains subscriber and other information that the system uses for processing calls and controlling operations. This is a limited view. As system manager, you are also the person responsible for the acceptance of the system by other staff members. Ultimately, you are the person who can make the system a successful, fully integrated part of the organization itself.

Your duties as system manager fall into 4 broad areas:

System maintenance: This includes inspecting and testing the system daily to ensure that it is active and working, optimizing the system's hard disk, and making backups of the system periodically as insurance against service disruptions.

Database maintenance: *The database* is the collection of subscriber and other information stored and used by the system. This includes recordings (prompts, names, and greetings). You'll periodically add to, edit, or delete information in the system database. For example, you'll probably add new subscribers to the system at some point. Routine attention to detail here keeps the system flowing smoothly.

Training: During the start-up phase, when the system is new to everyone, your role as an "expert subscriber" is critical. Others will rely on you as a system manager for quick answers to basic questions. The approach you use for training depends upon the number of subscribers. It can be as formal or informal as needed. At first, you might want to train users in conjunction with your installer. At a minimum, training must achieve three things: First, you must let each subscriber know that the system is on-line. Second, you must tell subscribers the minimum steps they must take to get started (listening to the enrollment conversation, or accessing their setup options to record a name and greeting, for example). Finally, you must tell subscribers about the learning tools available (the *User's Guide* and any other materials you or your installer have prepared). After a while, training will be reduced to training any *new* subscribers, notifying others of any system-wide changes made, and perhaps reminding subscribers of advanced features and "expert" shortcuts and tips.

Motivation: One of the most important things a system manager does is ensure that the system becomes an accepted, fully integrated part of the organization. This is more than teaching subscribers to press the right buttons; it is crucial that you be an advocate of the new system. Others will follow your lead in accepting and using the system.

As you can see, the job of system manager takes a combination of organizational, teaching, and motivational skills. At first glance, this might seem like a lot to tackle. Remember that you'll be approaching the job in stage-s-you won't have to do everything all at once.

Plus, your job is made much easier by 3 things:

- n Subscriber education is easy. In most cases, subscribers teach themselves how to use the system simply by listening to the enrollment conversation. The system guides a new subscriber through setting up a voice mailbox with easy yes-and-no questions. Or, subscribers can learn about the system by reading the *User's Guide*.
- n Your installer has eliminated a lot of the details for you by configuring many system features and options. You can learn the basics quickly, and then add to your skills at your own pace.
- n Training will teach you everything you need to know to become a successful system manager. The skills you learn here will help you educate and motivate other subscribers.

Other System Manager Considerations

Here are some other things you should consider:

Background knowledge: As system manager, it will help if you understand your Comdial telephone system. This means knowing how extensions are numbered and organized. This also means knowing how to use the functions and features available on individual telephone sets. When subscribers ask questions about the voice mail system, they will also ask questions about other telephone features.

Time requirements: While not a full-time job, your system manager duties do require routine attention. Generally, this time will decrease as you move from the start-up and training phases into normal operations with the system. Your installer can give you a better idea of what to expect based on your specific situation.

Sharing system manager duties: System manager duties can be shared by two or more people. The system does not limit the number of system managers. You can have as many subscribers with "system manager" status as you need. How duties are shared depends upon the special needs of your organization. For example, you might handle the basics, while your installer does the rest. Or, you might handle the "keyboard" part of the job and leave education to an in-house trainer. Once you complete these lessons, you'll understand the scope of the job. Then, you'll be best able to decide if and how you want to share system manager duties.

The Role of Your Installer

Your installer is an active partner in your system investment. He or she can help you get the best use from your voice mail system. Your installer ensures that the voice mail system and the Comdial telephone system integrate. "Integration" means that the two systems communicate fully with each other.

You may also depend upon your installer for:

- **Configuring and setting up the system.** This includes collecting and entering subscriber and other information. Your installer will help you choose the initial messages, options, and other such details that best fit your current needs.
- n **Initial education and orientation.** In addition to helping you learn and understand the voice mail system, this means teaching you other important details that are "outside" the software itself. Examples of these are: the

names and locations of the system components, location of power switches and other important controls, *and how to optimize the system's hard disk and make backups of the system software and database files.*

- n Ongoing technical maintenance. This includes servicing the system computer and other components as needed, and system expansion and enhancement. Examples are: increasing the number of telephone lines answered, updating system software, and implementing improved or expanded features.
- Solving problems and answering questions. When you have a question or a problem, call your installer. Your installer is most familiar with the details of your overall system. As a result, your installer can solve your problems and answer your questions quickly and competently.

Summary

This is the end of Lesson 1. Spend a few minutes using the commands you have just learned to move to various screens and pages. Once you are comfortable with the commands and the system's screens, press **Esc** then **Y** to sign out. Review the summary below before you begin the next lesson.

Key Topics and Terminology

How to start or restart the voice mail system
 "Awaiting a key" message
 The definition of "port"
 Quick, "Hello" test

The Banner Screen and its indicators, including:
 Ports available and port status
 Date, time, and answering status
 Keylock status
 Function keys available listing
 One-line help reminder

The definition of "subscriber," "guest," and "outside caller"
 How to sign in and out at the console
 The definition of Personal ID
 Automatic sign out
 Screen organization
 The definition of "screen" and "page"
 Your role as a system manager
 The role of your installer

Command Functions

Ctrl-Alt-Del for system reset/restart
Esc to sign out or exit system
Pg Dn **Pg Up**

- Ctrl-A for QuickStart Application Screen
- Ctrl-D for Personal Directory Screen
- Ctrl-G for Groups Screen
- Ctrl-P for Voice Prompt Editor Screen
- Ctrl-S for QuickStart Switch Setup Screen
- Ctrl-T for Transaction Directory Screen

Additional information

Please see these *Reference Manual* topics for discussions related to this lesson:

- n *Port Applications*
- *System Manager*

Lesson 2: Reviewing System Features

In Lesson 1, you took a brief tour of the six screens that the voice mail system uses to process calls and control operations. In this lesson, you'll take an in-depth look at each of these screens. We'll discuss specifics of how each screen is organized and used, and what information each screen contains. In the process, we'll introduce you to the Reference *Manual* and other learning guides by showing you where to look for details about the things we can only touch upon here.

You'll also learn how to use the system's "local connect" feature to listen to prompts, names, and greetings. As in Lesson 1, you'll use the system without making any changes in existing settings or stored information.

While this lesson contains more reading than hands-on activity, many important terms and concepts are defined here. The remaining hands-on training lessons depend upon your understanding this material.

QuickStart Application Screen, Page 1

QUICKSTART APPLICATION		Page 1 of 6
1. Site name: Your Company Name		
2. Contact: _____	Calls Answered	Phone#:
3. Total trunks/stations: 0 /0		Calls/day: 0
4. Day Calls Answered: All-trunks		Night Calls: All-trunks
5. All ports busy action: Ring-until-answered	Access Numbers	
6. Trunk Pilot #: _____		# of Trunks Answered: 0
Alternate Trunk #s: _____		
7. Voice Port Stations _____	Pilot #:	
Station Numbers: _____		

If you are continuing on after completing Lesson 1 and are already signed in...

Press: **Ctrl-A**

QuickStart APPLICATION Page 5 is shown.

Press: **PgDn PgDn**

QuickStart APPLICATION Page 1 is shown.

Or, if you are signed out, at the Banner Screen, sign in as "Thomas Jefferson"...

Press: **F2**

Please enter your ID:

Type: TOM  Enter
or type: 866  Enter

QuickStart APPLICATION Page 1
is shown.

This is one of two QuickStart screens found on the voice mail system. The QuickStart Application Screen contains at least 6 pages of information. (If your system has an optional feature package installed, you have more than 6 pages.) These pages organize many of the basic operating details for the system.

This first page gives an overview of how your system is configured. It keeps important traffic and contact information in one place, like a registration page for your system.

“QuickStart” is a trademark for our simplified start-up method that helps an installer get the voice mail system configured and running with a minimum of effort and error. QuickStart includes worksheets that help your installer collect and organize the subscriber and other information that must be entered initially. Other worksheets help plan how the system will process calls for your specific needs. These worksheets and the complete steps of the QuickStart method are found in the *QuickStart Application Manual*.

Page Organization and Data Fields


Notice that a screen page is divided into smaller areas by lines. These areas often have titles to show their general purpose. The QuickStart Application Screen, Page 1 shows Calls Answered and Access Numbers areas, for example.

Information is organized and stored in *data* fields contained within each area. You enter and edit database information in these fields by typing. To help you recognize that we are discussing something as it appears on-screen, we’ll print field names in a special screen typeface, for example: Site name.

In most cases, fields are labeled. The *current* field area is indicated by a highlight and by a blinking typing cursor. For example, the Site name field is currently highlighted on-screen. The highlight shows the size of the field and the cursor shows the current typing point. If you were to type characters now, they would type over your company name.

Sometimes, a field or a group of fields is labeled with a number followed by a period (like so: “1.”) These “line” numbers correspond to questions on QuickStart Application worksheets. Numbers (without a period) are also used to identify prompts on the Voice Prompt Editor Screen. When appropriate, we’ll refer to a single field, or group of related fields, by its line number *and* field name.

Escaping from Immediate Typing Mistakes

 Before you proceed, make sure that the NUM, CAPS, and INSERT keylock indicators are off (check the upper-right corner of your screen).

If you type something in a field accidentally, it is easy to undo the mistake. Try it now...

Type: abcd

abcd overtypes the Site name field.

Press: **[Esc]** **abcd** clears from the Site name field.

[Esc] works only immediately after the mistake. You must realize your mistake and press **[Esc]** before moving to another field. Once you move the cursor to another field (by pressing **[Enter]**, **[Tab]**, and so on), your change is stored. In this case, you'll have to move back to the field and edit it back to its original state.

QuickStart Application Screen, Page 2

QUICKSTART APPLICATION Page 2 of 6										
	All Ports	Port 1	Port 2	Port 3	Port 4					
	Day Nt	Day Nt	Day Nt	Day Nt	Day Nt					
10. Intro (Hello, this is...):	QP	<-	<-	<-	<-	<-	<-	<-	<-	<-
11. Action (Enter ext number):	QP	<-	<-	<-	<-	<-	<-	<-	<-	<-
12. Otherwise (Hold for oper):	QP	:5	<-	<-	<-	<-	<-	<-	<-	<-
13. System ID if no TTs:	0	\$PM								
14. Port Status:		Ans	Ans	Ans	A/D					
15. Rings to answer (0=>pool):		0	0	0	0					
16. Day/Night Schedule (1..4):		1	1	1	1					
17. Special Port Options:										

Press: **[PgDn]** **QuickStart APPLICATION Page 2** is shown.

This page contains fields that control what introductory message a caller first hears (lines 10 to 13) and how ports are answered (lines 14 to 17).

Lines 10, 11, and 12 contain the recorded "Hello, this is..." greeting and initial instructions a caller hears. We call this special group of greetings the *Opening Line*. Line 13 tells the system how each port should handle a caller who does not respond. Most often, these are callers who can't respond because they are calling from a telephone without touchtones. These callers are usually routed to the operator or to a special voice mailbox.

Lines 10 to 13 are divided into pairs of fields (labeled Day and Nt) for each individual port. These allow for separate day and night schedule actions on each port. For example, the system could answer a group of sales lines differently than a group of service lines or answer a particular port in a different language.

The fields on lines 14 to 17 are set by port. There is a field for each port on your system. These fields have been preset by your installer for best performance. See the Reference *Manual* for more details. Briefly, these fields are:

Port Status: This field controls how the system uses each port to answer, route calls, and to dial out to notify subscribers of voice mail received.

Rings to Answer: This is useful when the system serves as a backup for a receptionist or operator. More rings lengthens the time an operator has to answer before the system takes a call.

Day/Night Schedule (1..4): You'll explore day and night schedules in detail on the QuickStart Application Screen, Page 4. Basically, the system supports up to 4 different day and night schedules that may be applied to ports individually.

Special Port Options: Settings in this area control the way the system works with special telephone equipment.

QuickStart Application Screen, Page 3

QUICKSTART APPLICATION Page 3 of 6		
20. Set up System Operator System ID: 0 Voice name: 0:01		
Day? Yes-->,0 Nite? No	>Greeting »Day: 0:10 Nite: 0:08 Alt: 0:08 Active: D/N	>Action Day: GotoID-->\$PM Nite: GotoID-->\$PM Max-msg: 90 sec Edits OK? Yes Send Msg Urgent? No After Msg: Say-bye
Await-Ans-->4 Rings Intro: 0:02 Holding? No Transfer Options :		
Alternate System IDs for Special Operators on each Port:		

Press: **PgDn**

QuickStart APPLICATION Page 3 is shown.

The QuickStart Application Screen, Page 3 handles the setup for the System Operator Box. The System Operator Box lets the system handle “operator” calls very flexibly. It is discussed in detail in the *Reference Manual*.

Set up System Operator lets you choose the **System ID** for the operator. A System ID uniquely identifies an extension, a subscriber, a guest, and certain other things to the system. A System ID can be a number, a word spelled in touchtones (where A, B, and C translate to 2; D, E, and F are 3; and so on), or a combination of both. System IDs can be up to 10 characters long. They are discussed in detail in *the Reference Manual*.

The operator System ID is preset to “0”. In other words, a caller could press “0” at any time to be transferred to the operator box. From there, the system would route the caller to a live operator, a voice mailbox, or perform whatever action you have set within the box. Of course, you can choose any operator ID you wish, “HELP,” for example. The *Reference Manual* explains the many potential uses for this system feature.

QuickStart Application Screen, Page 4

QUICKSTART APPLICATION Page 4 of 6		
30. Today's date: 19-Jan-94 Time Now: 10:23am		
31. Schedule #1 a: 8:00am- 5:00pm MTWHF b: c: Current mode: DAY Ignore holidays? No	Schedule #2 a: - b: - c: - Current mode: NIGHT Ignore holidays? No	Schedule #3 a: - b: - c: - Current mode: NIGHT Ignore holidays? No
32. Schedule #4: DAY		
33. Holidays:		
34. Daylight Savings? NO Date On: 7-Awr Off: 27-Oct On Now? N/A Hours: 1		

Press: **PgDn**

QuickStart APPLICATION Page 4 is shown.

The QuickStart Application Screen, Page 4 controls date, time, and schedule-related information. The screen is divided into 4 areas. Let's look at each one.

System Date and Time

It is important that the system calendar and clock settings are correct, since the system adds the recording date and time to each message.

The date is set in the Today's date field. If the date is wrong, simply type the corrected date here. The Time Now field shows the current clock setting. This field may be changed just like the date field.

Both the date and time are stored in the system's battery-powered clock/calendar. The battery ensures that the correct date and time are kept even during power failures. Once set, this information should remain correct.

Day anti Night Schedules

The voice mail system can handle calls differently between its day and night schedules. The fields on line 31 let you set the range of hours and days of the week for these two modes of operation. In other words, here is where you define the days and hours your organization is open. The voice mail system calls your "open" time the "DAY" schedule. Note that you don't set a specific nighttime schedule; NIGHT is simply everything that falls outside the DAY schedule.

The system allows up to three separate ranges of DAY hours and days of the week for each schedule (these ranges are identified as "a," "b," and "c"). It also allows up to three such separate schedules called "Schedule 1," "Schedule 2," and "Schedule 3."

This flexibility can be confusing at first glance. Some examples of possible DAY hours will show you clearly how the DAY schedule is set:

Open Hours	Field Setting Range a:	Range b:	Range c:
8 to 5, Mon-Fri	8:00am-5:00pm MTWHF		
8 to 12 1 to 6 Mon-Fri	8:00am-12:00am MTWHF	1:00pm-6:00pm MTWHF	
9 to 9, Mon-Fri 9 to 6, Sat, Sun	9:00am-9:00pm, MTWHF	9:00am-6:00pm SU	
9 to 6, Mon-Thu 9 to 9, Fri-Sat 9 to 5, Sun	9:00am-6:00pm MTWH	9:00am-9:00pm FS	9:00am-5:00pm U
24 hours, 7 days	2:01am-2:00am MTWHFSU		

Your DAY schedule is entered into the "a:" field normally. Fields "b:" and "c:" are used when your hours vary during the day or vary by day of the week. For example, this might be an office that closes for lunch from 12 to 1 daily, or an office with limited weekend hours. Note that when specifying days for a range, "H" stands for Thursday and "U," for Sunday.

Schedule #1 (the first column shown on screen) is used by the system automatically. Alternate schedule numbers are entered by port at the bottom of QuickStart Application Screen, Page 1. This is useful when different parts of an organization operate at different times. For example, customer service might stay open several hours longer than the front desk.

Note that the Schedule #1, Schedule #2, and Schedule #3 columns each contain a field that tells you whether the schedule is currently in Day Mode or Night Mode: Current mode: DAY or Current mode: NIGHT. This field shows, based on the days and hours set within ranges a : through c : , whether DAY or NIGHT operation is in effect for the schedule. If the date and time shown on line 30 falls within a set schedule range, the field displays DAY, otherwise it displays NIGHT.

You can also set whether a schedule operates in Night Mode for 24 hours on holidays by using the Ignore holidays? field. We'll discuss holidays in more detail in just a moment.

Schedule #4

Line 32 Schedule #4 is an additional schedule that can be manually set to either Day Mode or Night Mode. Once set, it never changes mode. It is used only in special applications.

Holidays and Daylight Savings Time

Line 33, Holidays contains fields for up to 18 dates. Dates are entered in day-



QUICKSTART APPLICATION		Page 5 of 6
40. Defaults for each new Subscriber:		
Personal ID: 8X	Hold/Archive msgs: 0 /2 days	
Access: PCBF		
>Transfer	>Greeting	>Action
Transfer? Yes-->X		Take-msg
Await-Ans-->4 Rings		
Screening? No	Holding? No	Max-msg: 90 sec Edits OK? Yes
Message Notification		
Lamp #: X	Activate Lamps? Yes	
#1: X	after 0 min, 8:00am- 6:00pm MTWHF	4 rings 30 min,Off
#2:	after 0 min, 6:00pm- 9:00pm MTWHF	5 rings 60 min,Off
#3:	after 0 min, 12:00am-11:59pm MTWHFSU	0 rings 30 min,Off
#4:	after 0 min, 12:00am-11:59pm MTWHFSU	4 rings 60 min,Urgent
Ctrl-E for expanded options		

Press: **PgDn** QuickStart APPLICATION Page 5 is shown.

The QuickStart Application Screen, Page 5 lets you specify the standard (default) settings for each subscriber or guest added to the system. Think of it as a standard entry form for a subscriber or guest's Personal Directory page.

The Personal Directory has many different control settings. These can be customized for each subscriber and guest, but more often than not, most of the settings will be the same for each person. You can save yourself time when enrolling new people on the system by entering default settings here. Then, when you add a new Personal Directory page, you'll only have to make changes when a subscriber's or guest's settings are different.

Your installer has preset the best default settings for your system. We'll discuss these fields and their settings in more detail when we review the Personal Directory Screen later in the lesson.

QuickStart Application Screen, Page 6

QUICKSTART APPLICATION		Page 6 of 6
50. Maximum Message Life: 999 days		Call Report Aging: 14 days
51. Public Hold/Archive msgs: 0 /2		New Msgs: 0=0:00 Total: 0=0:00
52. Maxperson-personrecording: 300 secs		Max screening recording: 6
53. Skip back time on #: 4		Max ID attempts: 4 Bad ID Goto-->
54. Record Pauses...Beginning: 5		Short ending: 2 Long ending: 3
55. Beep on record? Yes		Disk full warning at: 15 mins left
56. Blank PC screen? Yes		Screen Type: Auto Keypad: Q=7, Z=9 keys
57. OS Surrender- Daily:		Weekly: Monthly:
58. Startup:		Error notices to: 0
59. ID for Alpha Directory: 555		Auto xfer? Yes ID for Num Groups:
Public Fax Box		
Fax ID: \$FAXBOX	Transfer? No	Alt Action: Operator
Voice name: 0:02	Await-Ans-->4 Rings	Announce: Always
	Holding? No	

Press: **PgDn** QuickStart APPLICATION Page 6 is shown.

The QuickStart Application Screen, Page 6 gathers together a variety of control options, settings, and indicators. Detailed discussions of each field are found in the *Reference Manual*. We'll summarize them for you here. If you need more details, refer to the specific field name in the *Reference Manual* index.

Maximum Message Life: This field sets how many days a new message will be held before it is deleted automatically. A *new message* is one that has not been heard by a subscriber or guest. Once a message is heard by a subscriber or guest, it is called an *old message*. A setting of “999” keeps new messages indefinitely.

Call Report Aging: The system can produce a number of different reports that summarize call processing activity. Data about system activity are stored in a special file. This field lets you set how many days worth of activity, counting back from the current date, are kept in this file. Consequently, this setting determines the overall reporting period for any system report.

Public Hold/Archive msgs: Once heard, all messages are held on the system for a time automatically, and can be specifically held for a longer time. *Hold* is the number of days an old message is kept before it is deleted. A setting of “0” means that message will be held until midnight of the current day, “1” means until midnight the following day, and so on. Up until this time, the message can be reheard (reviewed) as desired.

A subscriber or guest can request that any message be “archived” so that it will be kept for a longer period than the customary hold period. The **archive** time is given in days, as well.

These fields let you set the hold and archive times for public messages only. Regular subscribers’ and guests’ message hold and archive times are set individually on the Personal Directory pages. Public messages are messages received in the operator box or a special mailbox called the “Public Interview Box.” See the *Reference Manual* for more details.

New Msgs and Total : These fields display information only—they can’t be edited. New Msgs shows the total count and duration (in hours and minutes) of new public messages received. Total shows the total count and duration for all public messages (new and old) currently on the system.

Max person-person recording: This field sets the maximum allowable length a single subscriber-to-subscriber message can be. It is preset to 300 seconds, or 5 minutes total.

Max screening recording: When the voice mail system is asked to screen calls, it asks a caller “*Whom may I say is calling?*” and then records the person’s reply. The maximum recording length of this reply, in seconds, is set here. It is preset to 6 seconds.

Skip back time on # : As a message is played, a caller can press the “#” touchtone to repeat a small portion of it. By skipping back slightly, a caller can have the system repeat information that was missed (a telephone number that was spoken too quickly, for example). This field lets you set how many seconds will be skipped back with each # press. It is preset to 4 seconds. This “skip back” setting is also used to control a similar “fast forward” feature that is available as messages are played. You’ll learn to use these features in Lesson 5.

Max ID attempts: Subscribers and guests retrieve messages by dialing their Personal ID when the voice mail system answers. Occasionally, a subscriber or guest may misdial his or her Personal ID and need another chance. This field lets you set the number of times a subscriber or guest can try to enter a valid

Personal ID. It is preset to 4 tries. After this number of tries, the caller is disconnected or transferred to another extension. This is a security feature, which slows down the person who might be trying to enter the system by guessing at Personal IDs.

Bad ID Goto-->: This field can contain a System ID which a caller is transferred to if the caller repeatedly dials invalid IDs.

Record pauses : When a caller pauses while speaking, the system must decide if the caller is finished speaking or merely collecting his or her thoughts. The system uses the length of the pause to make this decision. Pauses are interpreted 3 ways:

Beginning pause is the number of seconds the system will wait for a caller to start speaking. It is preset to 5 seconds. In other words, if the caller doesn't start to leave a message within 5 seconds, the system will assume no message is desired.

Short ending pause is the number of seconds the system will wait after a caller stops speaking to assume that the message is complete. "Short" is used for messages which have a maximum message length of less than 30 seconds. It is preset to 2 seconds. After 2 seconds of silence on a short message, the system will assume the message is complete and continue the processing steps.

Long ending pause is used for messages which have a maximum message length of 30 seconds or longer. This pause is longer because callers tend to pause more often and for more time when leaving detailed or complex messages. It is preset to 3 seconds.

Beep on Record? When this is set to Yes, the system beeps just prior to recording a response or a message from a caller. This is preset to Yes. In some applications, the beep helps prompt callers to begin speaking.

Disk full warning at n mins left When the amount of disk storage space left on the system is less than the number of minutes specified in this field, the system alerts subscribers when they sign in to the system. It also asks them to delete any messages they don't need so as to free up more space.

Blank PC screen? When this is set to Yes, the Banner Screen is cleared and the "awaiting a key" message is displayed whenever the console keyboard is idle for several minutes. No disables this feature.

Screen Type: Normally this is set to Auto, meaning the system automatically senses whether a monochrome or color monitor is being used with the console. This field allows you to choose Mono or color manually, if needed.

Keypad: This field displays the type of keypad map currently set for the system. This field is for display only.

OS Surrender and Startup: This feature lets the system shut down the voice mail system and automatically run another program. This is useful for automating the data backup process. This feature is discussed in detail in the *Reference Manual*.

Error notices to: This field sets the system to send a voice message when certain system errors occur. This field is usually set to 0, to make the error notices available to anyone with public message access. To send the error notices to one or more subscribers, you may also set the field to one or more Extension # IDs, separated by commas.

ID for Alpha Directory: When the voice mail system answers, a caller can dial an extension number directly to reach a particular subscriber. Often, a caller might not know a subscriber's extension number. The automatic directory assistance feature lets a caller find a subscriber's extension by spelling the first three letters of the person's name, using a touchtone keypad. This field lets you choose the number a caller dials to reach automatic directory assistance. It is preset to 555. Some systems may not be using the automatic directory, because the system is set for keypads without letters (so it is not possible to spell a name). These systems may be using numeric directory assistance instead. See the *Reference Manual* for more details about automatic and numeric directory assistance.

Auto xfer? This field applies only to systems using automatic directory assistance. If this is set to Yes, a caller will be transferred from automatic directory assistance to the desired subscriber automatically, once the extension has been found. This works only when there is a single automatic directory assistance entry matching the three letters dialed. If two or more subscribers match, the caller must dial the extension number manually.

ID for Num Groups : This field lets you set a special System ID for subscribers to leave messages for message groups by pressing numbers instead of spelling a group's name. This is useful if the system uses a keypad without letters on it (thus preventing subscribers from spelling a group's name), or if some of your subscribers prefer leaving messages by number. You can set some or all subscribers for numeric access instead of alphabetic access. See the *Reference Manual* for more details.

Public Fax Box

The **QuickStart** Application Screen, Page 6 is also used to set up fax detect, routing, and notification. The voice mail system can recognize incoming faxes, and automatically deliver them to your fax machine. You program how the system handles faxes using the fields on the lower portion of the screen.

Fax ID: The System ID a caller may press to reach your fax machine. By default, this ID is **\$FAXBOX**. To set up the voice mail system to deliver incoming faxes to your fax machine, you change this field to a **unique** System ID. The ID can be the same as the fax machine's actual extension number, but doesn't have to be.

Voice Name This field stores the recording for the Public Fax Box's name (*"The Public Fax Box"*).

Transfer? This field controls whether and how incoming fax calls are transferred to the fax machine's actual extension number. To tell the voice mail system to transfer calls to your fax machine, you set this field to Yes, and enter the fax machine's telephone extension number. In the area below the Transfer? field, you select a transfer type. For the Await Answer and Wait for

Ringback call transfer types, in the Rings field you also set the number of rings the voice mail system should wait before taking an action.

Rings: The number of times the voice mail system rings the fax machine's extension before taking the action specified in the Alt Action field. Applies to Await Answer and Wait for Ringback call transfer types only.

Holding? This field controls whether callers are allowed to hold if the fax machine's extension is busy.

Alt Action This field controls the action the system takes if your fax machine is busy or doesn't answer (and call holding for the fax extension is turned off). By default, the system transfers the call to the operator. You can also set the 'system up to say goodbye and hangup, just hang up, start the conversation over at the Opening Line, or to route the call to another System ID.

Announce This field controls whether the system notifies you when it transfers a call to the fax machine, and whether it asks the person sending a fax to record a message describing the fax. The Announce field has four possible values: Always, Voice, Post, and Never. For more details, see the Reference Manual.

Personal Directory Screen

PERSONAL DIRECTORY										NAME	SORT
Name: Jefferson, Thomas				SYSTEM MANAGER							
Personal ID: TOM				Voice name: 0:00				Hold/Archive msgs: 0 / 2 days			
				New Msgs: 3 =0:03				Total: 3 =0:03			
		rings		Greeting		Action					
		Message Notification		»Std: 0:00		Take-msg					
Screening? No		Holding? No		Alt: 0:00		Max-msg: 90 sec		Edits OK? Yes			
Lamp #: x				Activate		Lamps? No		On Now? No			
#1:	after 0 min.	8:00am-	6:00pm	MTWHF	5 rings	30 min	Off				
#2:	after 0 min.	6:00pm-	9:00pm	MTWHF	4 rings	60 min	Off				
#3:	after 0 min.	12:00am-	11:59pm	MTWHFSU	0 rings	30 min	Off				
#4:	after 0 min.	12:00am-	11:59pm	MTWHFSU	4 rings	60 min	Urgent				
Ctrl-E for expanded options											

Press: **Ctrl-D**

PERSONAL DIRECTORY is shown.

A page is added to the Personal Directory Screen for each enrolled subscriber and guest. The screen itself controls many options for each person. You'll add sample subscribers and experiment with control features in Lesson 3, so we'll limit this discussion to a brief overview.

A Personal Directory page is divided into three control areas. The topmost area of the screen contains information about the subscriber or guest. This includes the person's first and last name, a recording of the name, a Personal ID, and indicators showing the total count and duration of messages received. On a subscriber page, this area also shows an extension number, message hold and archive settings, and any service access options that are set. These additional fields are not available for a guest.

The middle area of the Personal Directory page contains fields that control how calls are transferred, control how messages are taken, and store an optional alternate greeting. These features determine whether calls are transferred to the subscriber's extension (versus taking an immediate message), how many rings to

wait before assuming no-answer, whether callers are allowed to hold, and whether the system “screens” calls. You can also see which greeting is active, and determine how the system will handle the caller if he or she doesn’t press a touchtone during the greeting. In most cases, the Action will be Take-msg (take a message).

Here too is where you set the maximum allowable length of an individual message, and select whether or not a caller may “edit” a message he or she has left. These features are not available for a guest.

The bottom area of the Personal Directory page controls message notification and delivery to a subscriber or guest. When voice mail is received for a subscriber, there are many ways the system can alert a person of waiting messages. On Comdial telephone systems that feature message notification by station, the voice mail system can light a “message waiting” lamp or activate a stutter dialtone.

In addition to notifying by station, the system can be set to deliver messages to a subscriber or guest by phone. In other words, the voice mail system can periodically call the subscriber at his or her extension number, home or work telephone, pager, and so on. There are fields for up to 4 different delivery options. These can be set to deliver by time and day of the week at various intervals and schedules.

Expanded Transfer Options

The Personal Directory page also has an “expanded” window, which lets you change special call transfer settings for a subscriber’s mailbox. You can open the expanded window by pressing **Ctrl-E**, then pressing **↓** **←Enter** from any subscriber’s page. (You can’t view the expanded window from a guest’s page, since guests don’t use call transfer.) Let’s take a look...

PERSONAL DIRECTORY			NAME SORT
Name: Jefferson, Thomas		SYSTEM MANAGER	
Personal ID: TOM		Voice name: 0:02	
Extension # ID: 1776		Hold/Archive msgs: 0 / 2 days	
EXPANDED TRANSFER OPTIONS = Press ESC to Exit			
>Transfer	>Greeting	>Action	
Transfer? Yes-->,X	»Std: 0:00	Take-msg	
Await-Ans-->4 Rings	Alt: 0:00	Max-msg: 90 sec Edits OK? Yes	
Screening? No Holding? No	Active: STD	Send Msg Urgent? No	
>Transfer Options: A		After Msg: Say-bye	
Screening Options:			
One key dialing: 1>	2>	3>	4>
6>	7>	8>	9>
			0>

First, make sure you are looking at a subscriber’s page. To view Thomas’s page...

Press **Ctrl-J** then type JEF **←Enter** to jump to Thomas’s page.

Then, to display expanded transfer options...

Press: **Ctrl-E** **↓** **←Enter** The system displays a pop-up menu, then the Personal Directory’s Expanded Transfer Options window.

The expanded transfer window shows you: the subscriber’s call transfer and call screening options, the personal greeting that is active, and what action the system takes after playing the subscriber’s greeting. Usually, the action will be

Take-msg. The expanded window also shows how the system handles messages for the subscriber, including how long messages can be, whether the caller can edit the message, whether the message will be sent urgent delivery, and what the caller hears after leaving the message. The bottom portion of the expanded window lets you add **one-key** dialing to a subscriber's mailbox. This is discussed in detail in the Reference *Manual*.

For now, let's close the expanded portion of the Personal Directory page.

Press: **Esc**

Expanded Transfer Options window closes.

Groups Screen

Member name		Last contacted		Member name		Last contacted	
Xavier, Jan				Yale, Hugh			
Yeoman, Mike				Ying, Sue			
Zaftig, Pat				Zeller, Nell			
Zink, Jay							

Press: **Ctrl-G**

GROUPS is shown.

As we've explained previously, the voice mail system lets you create message groups to simplify the task of sending the same message to many subscribers at once. For example, you might wish to deliver the same message to every subscriber on the system. This can be done by setting up a message group containing every subscriber's name. Subscribers can create message groups by phone, or the system manager can create a group at the system console.

The system keeps a separate page for each message group. Creating groups and adding subscribers is easy. You'll create sample message groups in Lesson 5, so we'll just summarize the basics of the screen here.

Name and Voice : Each message group has a name or group number, and a corresponding recording of its name.

Open Group of : Message groups are "owned" by a particular subscriber. A message group is either "open" or "private." Any authorized subscriber can send a message to an open group. When a subscriber owns a private group, only he or she can leave messages for that group.

Dispatch: This field can be set to either Yes or No. When this option is set to Yes, the first person in the group who listens to a message is the only person who receives it. This has many applications. For example, a receptionist might place a sales lead as a dispatch message for "All Sales People." Then, the first sales person to listen to the message would be the only person to receive the lead.

Member name: This area of the page lists the last and first names of each message group member in alphabetical order.

Last contacted: Shows the date and time a group member last listened to a group message. This is useful when you want to verify that each group member has heard a group message.

Directory Groups and Directory Menus

The Groups Screen may also contain pages for two special kinds of groups: **directory** groups and **directory** menus. These special groups allow the installer or system manager to set up directory assistance using numbers instead of letters.

Using numeric directory assistance involves grouping subscribers by a common characteristic. In most cases, subscribers are grouped by their department. However, you can also group subscribers based on their location, schedule, or where their name falls in the alphabet. Using directory groups and directory menus to create numeric directory assistance is explained in detail in the *Reference Manual*.

Transaction Directory Screen

T.R.A.N.S.A.C.T.I.O.N. D.I.R.E.C.T.O.R.Y.		NAME SORT
Name: 'Departments Box'		Transaction box of Jefferson, Thomas
System ID: 411		Voice name: 0:02 Schedule #:
>Transfer	>Greeting	>Action
Day? No	>Day: 0:13	Day: Operator
Nite? No	Nite: 0:00	Nite: Operator
Await-Ans-->4 Rings	Alt: 0:00	Max-msg: 90 sec
Intro: 0:00 Holdina? No		Edits OK? Yes
Transfer Options :	Active: D/N	Send Msg Urgent? No
		After Msg: Say-bye
One key dialing: 12700	22800	3>555
6>	7>	4>
		8>
		9>
		0>

Press: **Ctrl-T** TRANSACTION DIRECTORY is shown.

The Transaction Directory contains a page for each transaction box created. Transaction boxes are stored alphabetically by “box” name. Box is short for “mailbox,” and each page of the Transaction Directory contains one complete “box.” There are three types of transaction boxes: the basic transaction box, the voice detect box, and the interview box.

Transaction boxes can distribute audiotext information to callers, provide menus of choices for callers, and route calls through the system in special ways. Transaction boxes use the “Transfer - 7 Greeting - 7 Action.” process to handle calls. Transfer and Greeting control how calls are transferred, and tell you which greeting is active. Action allows for alternate call processing options in addition to taking a message.

One key dialing lets the transaction box route calls and deliver information based on a caller’s single touchtone response, just like you saw earlier on the Personal Directory page. In the example shown above, for instance, the greeting might say “For sales, press 1, for service, press 2, and for directory assistance, press 3.” This is much easier for a caller than saying “For sales, press 700, ” and so on.

To use one-key dialing, outside callers must have touchtone telephones. However, you can also set the system to recognize callers' spoken responses to yes-and-no questions by using voice detect boxes.

Interview boxes ask a series of questions and record the caller's response to each question. These can be used to collect information in a controlled, logical way. For example, a catalog company could automate nighttime order taking and be certain that all the relevant details are collected (name, address, telephone, quantity, credit card number, and so on).

TRANSACTION		DIRECTORY		ID	SORT
Name: Public Interview		Interview box of		Public Access	
System ID: \$PM		Voice name: 0:02			
Question	Reply	Question	Reply	Question	Reply
1. 0:08	6 secs	9. 0:00	0 secs	17. 0:00	0 secs
2. 0:02	9 secs	10. 0:00	0 secs	18. 0:00	0 secs
3. 0:02	9 secs	11. 0:00	0 secs	19. 0:00	0 secs
4. 0:02	9 secs	12. 0:00	0 secs	20. 0:00	0 secs
5. 0:03	40 secs	13. 0:00	0 secs		
6. 0:03	0 secs	14. 0:00	0 secs		
7. 0:00	0 secs	15. 0:00	0 secs	Send Msg Urgent? No	
8. 0:00	0 secs	16. 0:00	0 secs	After: Say-bye	

Press: **[PgDn]**, **[PgDn]**
and so on

Until the Public Interview Box is displayed.

Voice detect boxes allow callers to make choices by saying "Yes" or remaining silent for "No". You can use voice detect boxes to set up special call routing, or other special applications. This feature is especially useful if many of your callers do not have touchtone keypads. The system is shipped with a sample voice detect box already added with the System ID \$VOICE. See the Reference Manual for more details.

TRANSACTION		DIRECTORY		NAME	SORT
Name: Voice Detect Box		Voice detect box of Jefferson, Thomas			
System ID: \$VOICE		Voice name: 0:02		Schedule #:	
>Transfer		>Greeting		>Action	
Day? No		»Day: 0:15		Day: Operator	
Nite? No		Nite: 0:00		Nite: Operator	
Await-Ans-->4 Rings		Alt: 0:00		Max-msg: 90 sec	
Intro: 0:00 Holding? No		Active: D/N		Edits OK? No	
Transfer Options :				Send Msg Urgent? No	
				After Msg: Say-bye	
Voice Selection: Voice>		Silence>			

Press: **[PgDn]**, **[PgDn]**
and so on

Until the sample voice detect box is displayed.

Transaction boxes, voice detect boxes, and interview boxes are rich and flexible features of the system. For additional information and suggested applications see the Reference Manual.

Voice Prompt Editor Screen

PROMPT SET: DR-Directory		VOICE PROMPT EDITOR								
PROMPT Num	Description	All Ports Day Nt	Port 1 Day Nt	Port 2 Day Nt	Port 3 Day Nt	Port 4 Day Nt	Port 1 Day Nt	Port 2 Day Nt	Port 3 Day Nt	Port 4 Day Nt
1	Please press the first thr	:4	<-	<-	<-	<-	<-	<-	<-	<-
2	Please enter the letters n	:2	<-	<-	<-	<-	<-	<-	<-	<-
3	You may dial the extension	:3	<-	<-	<-	<-	<-	<-	<-	<-
4	To stop the directory, pre	:6	<-	<-	<-	<-	<-	<-	<-	<-
5	There are no matches to th	:3	<-	<-	<-	<-	<-	<-	<-	<-
6	Press 1 to try another	nam :2	<-	<-	<-	<-	<-	<-	<-	<-
7	I'm sorry, directory assis	:3	<-	<-	<-	<-	<-	<-	<-	<-
8	This directory will help	y :4	<-	<-	<-	<-	<-	<-	<-	<-
9	End of...	:2	<-	<-	<-	<-	<-	<-	<-	<-
10	To start the list again, p	:3	<-	<-	<-	<-	<-	<-	<-	<-
11	To hear the list again, pr	:3	<-	<-	<-	<-	<-	<-	<-	<-
12	Extension...	QP	<-	<-	<-	<-	<-	<-	<-	<-
13	For...	QP	<-	<-	<-	<-	<-	<-	<-	<-

Press: **Ctrl-P** VOICE PROMPT EDITOR is shown.

The “voice” of the voice mail system consists of digital recordings of hundreds of words and sentences. Spoken by the system, these recordings are termed *prompts*. Prompts tell a caller what action to take or tell callers what is happening as they progress through the system.

Along with recorded names, greetings, and messages, these prompts are connected to create the conversations the system conducts with a caller.

The Voice Prompt Editor Screen groups the majority of the prompts together in a single, accessible place. There are several hundred prompts listed. Here, you may review or change any of these prompts.

Related prompts are grouped together in what are called **prompt sets**. For example, the first prompt set contains prompts that are used in the system’s conversation relating to looking up subscribers by name in directory assistance.

If you need to find a specific prompt, see the guide *Changing the System Conversation*. This guide explains stepbystep how to find and change prompts, and how changing a prompt affects the system conversation.

System prompts are extraordinarily flexible. Notice that different prompts can be recorded for day and night schedules and prompts can be different for each port or group of ports. This flexibility can be used to create a system that “speaks” more than one language, handles two different company departments—even two different companies-within a single system.

Voice Fields

Prompts and other sound recordings played by phone are stored in screen areas called *voice fields*. The system uses the contents of voice fields to create a “conversation” with a caller. Sound recordings used by the system fall into 4 general categories:

Prompts These recordings are the system’s “voice,” telling callers what action to take, or what is currently happening with their call.

Voice Names -or- Names These identify a subscriber, guest, or group of subscribers to a caller by phone. These are simply recordings of individuals speaking their name (or a group's name).

Greetings There are four kinds of greetings: subscriber greetings, transaction box greetings, voice detect box greetings, and system greetings. Subscriber greetings are recorded by individual subscribers. These optional messages are played to a caller when the subscriber is unable to take a call. This is like having an individual answering machine for each extension—"Hi, I'll be away on vacation until..." Transaction box and voice detect box greetings can "greet" a caller in many varied ways. These uses are discussed in the *Reference Manual*. System greetings are the prompts used in the system's Opening Line. The system greeting is heard by every caller and is stored on the QuickStart Application Screen, Page 2, Lines 10 through 12.

Audiotext messages Transaction box greetings can also be used to deliver information to a caller (for example, today's weather forecast). These messages can be arranged in a menu of choices callers can select.

A system manager can use a telephone to "connect locally" with the system, and then listen to, change, or delete anything recorded in a voice field. You'll learn how to connect locally shortly. Subscriber, transaction box, and voice detect box greetings can be changed by phone as well. You'll learn how to do this in Lesson 4.

Of course, the system also records and stores messages left by outside callers, subscribers, or guests. Unlike voice field recordings, messages can't be heard or changed by the system manager working at the console. For security and privacy, messages are played only to the subscriber or group the messages were sent to.

About Spoken Text Shown in These Lessons

In these lessons, we use two kinds of quoted, italic letters to help you better identify the printed text that you'll speak or hear spoken over the telephone:

"You have one new message. Would you like to check it?"

-OR-

*"Hi, this is Chris **Aaronson**, I'll be away **from** the office through Friday..."*

Plain, quoted italic letters mean: you'll hear the system say these words. Quoted, italic letters in boldface mean: speak these exact words into the telephone, so the system can record them.

You'll practice recording names and greetings in later lessons.

Connecting With The Voice Mail System Locally

When you are signed in as a system manager, you can use the "local connect" feature to hear and record prompts, names, and other voice field information using a telephone handset.

Local connect is made with the **F3** Select Port, and **F4** Local on/off, command keys. This is a quick, 4-step process. You'll need a telephone within arm's reach of the system console.

Read all these steps, then follow them to establish a local connection with the system:

1. Dial the system. If you are on a busy system, you might have to wait until a port is free to answer calls.
2. After you dial, watch the port status indicators in the upper-left corner of the Banner Screen. Look for the port taking your call. You'll see RINGING followed shortly by DAY ANSWER (or NIGHT ANSWER) as your line rings, is answered, and the system plays the Opening Line greeting.
3. The port selection indicator, >>, shows which port will connect locally when you press **F4**. Press **F3** to move the ">>" indicator to the port that has answered your call.
4. Press **F4** to connect locally. The port status indicator will change to Local Connect, and any message you hear playing will stop.

NOTE: Once connected locally, leave the telephone handset off-hook. As you type and read, place the handset on the desk-not back into the cradle of the telephone. If you hang up the telephone before you are finished with the local connection, you'll have to disconnect (discussed on page 42) and then reestablish your connection.

NOTE: On busy systems with more than 12 ports, press **Ctrl-F3** to view the port status indicators for the additional ports on the system.

Listening to Voice Fields

To verify that you are connected properly, listen to a voice field. You should be at the Voice Prompt Editor Screen, Page 1. The PROMPT SET should say DR-Directory. The highlight should be on prompt 1, "Please press the first thr..." The voice fields for this and the other prompts are to the right of the prompt text. You must position the cursor on a voice field to hear it. Move the cursor with the **Tab** key...

Press: **Tab** Voice field under All Ports, Day is highlighted.

Although different voice fields are labeled with various names on-screen ("Greeting," "Name," and "Day," for example), they are easily identified. Simply check the one-line help indicator at the bottom of the screen. When the cursor is positioned on a voice field, one-line help *always* reads Press **F10** to play message, **DEL** to delete it.

Voice fields are also easily identified since they show the length of the recorded sound. Prompt lengths are given in seconds. For example, : 5 means the prompt is 5 seconds long. When a prompt is longer than 9 seconds, you'll see >9 rather than an exact time. Unrecorded (empty) prompts show a left-arrow (<-) instead of a time. Names, greetings, and other "non-prompt" voice fields show the length in minutes and seconds. For example, 1: 05 means 1 minute, 5 seconds. When empty, these fields show 0 : 00.

Certain prompt fields show the letters QP instead of a time. This is an abbreviation for “Quick Play.” This is a system feature that allows often-used prompts to be accessed faster. This feature, set by your installer, keeps conversations moving smoothly under high call loads.

You can listen to any voice field using local connect. You simply move the cursor to the desired voice field and press **F10**.

Try it now. Listen to the handset and...

Press: **F10**

“Please press the first three letters of the person’s last name.”

Listen to prompt 2...

Press: **↓**

Prompt 2, All Ports, Day entry is highlighted.

Press: **F10**

“Please enter the letters now.”

You may experiment with listening to other prompts on this first page or any of the other Voice Prompt Editor Screen pages.

Disconnecting Locally

In the next lesson, you’ll use the local connect feature to record voice fields as well as hear them. For now, since you have finished with your local connection, it is important to disconnect properly. *Always press **F4** to turn local connect off.*

Remember, **F4** acts only on the port with the “>>” indicator. This should still be positioned by the Local Connect port you are currently connected to. If not, use **F3** to move “>>” to the correct port.

Hang up your handset.

Press: **F4**

Local Connect indicator clears.

This action returns the port back to its prior answer status so it can resume processing calls.

*NOTE: If you forget to switch the local connection off, the port will not answer calls. This will remain true until you remember to press **F4** or until the system discovers you have disconnected. This can tie up the port for several hours.*

QuickStart Switch Setup Screen

QUICKSTART SWITCH SETUP		Page 1 of 3
1. Switch: COMDIAL	ExecuTech 2000 Series COM820 20	
2. Integration Options: COMVM DTMFCP HUT=A DT DT3=3		
3. Outdial Access: 9,	Recall: &	
4. Transfer Initiate: &,X	Busy Recall: &	
Connect: Q		
5. TT Prompt/Msg/Record: 5 /7 /9	Release on LCR? Yes	
6. Answer on ring low? Yes	Off-hook delay: 5	
8. Ringedn delay: 400	Ring-off time: 40	

Press: **Ctrl-S**

QuickStart SWITCH SETUP

Page 1 of 3 is shown.

This is the other **QuickStart** screen on the system. The Switch Setup Screen contains 3 pages of settings that tell the system how to communicate with your telephones and telephone equipment. This purely technical information is the responsibility of your installer. It includes settings for call transfer codes, message waiting lamp activation codes, dialing access codes, touchtone sensitivity settings, and ring and busy signal characteristics. Unless instructed to do so by your installer, there are no further adjustments for you to make here.

Summary

This is the end of Lesson 2. You have covered a lot of material here. You should now be thoroughly familiar with each of the screens the voice mail system uses to store and organize information. You should also be familiar with the basic purpose of data fields found on each screen. Please spend a few minutes reviewing this information before you continue with the next lesson.

Key Topics and Terminology

Screen organization

The definition of "field"

The location and purpose of the Opening Line

Setting the system date and time, and day and night mode schedules

Setting holiday dates and daylight savings time

The definitions of "new" and "old" messages

The definitions of "hold" and "archive"

The definition of "one key dialing"

The definitions of "prompt," "voice field," "voice names," and "greeting"

How to make a local connect and listen to a voice field

The purpose of the ">>" port selection indicator

What is meant when a prompt shows "QP" in the voice field

The make and model of your Comdial telephone system

Command Functions

- Esc** to undo an immediate typing mistake
- F3** to move the port selection indicator
- F4** to make a local connection
- F10** to listen to the contents of a voice field

Additional Information

Please *see* these *Reference Manual* topics for discussions related to this lesson:

- n *Backing Up and Restoring*
- n *Directory Assistance*
- n *Faxes & the Public Fax Box*
- n *Messages*
- n *Message Taking*
- n *Operator Box*
- n *Port Applications*
- n *Public Interview Box & Public Messages*
- n *Recording Voice Fields*
- n *Schedules*
- n *Subscribers*
- n *Switch Setup*
- n *System IDs*
- n *Transaction Boxes*
- n *Voice Detect Boxes*

See also:

- n *Changing the System Conversation*

Lesson 3: Adding Subscribers & Guests

In this lesson you'll learn the basics of using the voice mail system as system manager. You'll add new subscribers and a guest to the system. You'll learn how to assign system manager status to a subscriber and you'll learn how to edit subscriber information and all other information stored on the system. Finally, you'll practice using local connect to record names and you'll learn about the various message taking, notification, and delivery options available to each subscriber.

Please note that we've designed the samples used in this lesson carefully to avoid conflicts with actual subscribers or other information. You can enter the sample information and train without concern, while your system processes normal calls. At the end of Lesson 5, we'll show you how to erase the training samples and return your system to its original state.

Adding New Subscribers

Adding new subscribers to the system is a simple process. All you have to do is add a new page to the Personal Directory Screen and enter the subscriber name, extension, and other preliminary information. The system's enrollment conversation guides the subscriber through the process of setting up the mailbox for use.

As part of installation and setup, your installer has already added current subscriber information for you. But, it is important for you to know how to do this for yourself. You'll work with this part of the system often, adding and editing subscribers, and mirroring physical changes in extension numbering and locations.


At the Banner Screen, sign in to the system as "Thomas Jefferson"...

Press: **F2**

Please enter your ID: is shown.

Type: TOM **←Enter**
or type: 866 **←Enter**

QuickStart APPLICATION Page 1
is shown.

 Before you continue, make sure that the CAPS, NUM, and INSERT keylock indicators are OFF--check the upper-right corner of your screen.

Move to the Personal Directory Screen...

Press: **Ctrl-D**

PERSONAL DIRECTORY is shown.