Documentation Change Notice for CMS(2)/(4)-U10 ETU

It is very important to note that this product **does not** support the following features.

- Softkeys
- Live Record
- Live Monitor
- Call Return
- CID
- Call Holding
- Call Screening

Please ignore any references to these features that may be included in the documentation that is shipped with the product.

Part Number - 750240-0

NOTICE

NEC

EliteMail VMS/
EliteMail Limited

JOB SPECIFICATIONS MANUAL

NEC America, Inc.

Stock Number 750176-1

Issue 1

NEC America, Inc.
1555 Walnut Hill Lane
Irving, TX 75038

Business Terminals Division

Preface

SECTION 1
GENERAL INFORMATION

The EliteMail VMS/EliteMail Limited system is people oriented, and speeds communication between people using the very latest technology.

The EliteMail VMS/EliteMail Limited has a set of manuals that provide all the information necessary to install and support the system. The manuals are described in this preface.

SECTION 2
THIS MANUAL

This manual provides detailed information to tailor the application to the customer needs. Worksheets are provided to collect information about the NEC telephone system that can be used by the service technician when customizing the system.

SUPPORTING DOCUMENTS

EliteMail VMS/EliteMail Limited Technician Guide
(Stock Number 750370)

This manual provides general information about the system features, configuration, and standards. Sections of this manual include:

- ✆ Hardware Specifications
  Describes installation and operation of VMS/FMS( )-U10 ETU.
- ✆ Programming
  Provides Memory Block assignment to program VMS/FMS( )-U10 ETU.
- ✆ Console Maintenance
  Provides procedures for all local and remote maintenance.
- ✆ Reference Book
  Provides detailed information to enable the technician to set up and maintain the EliteMail VMS/EliteMail Limited system.
- ✆ Glossary
  Defines terms used in this guide.

Table of Contents

Chapter 1 Job Specification Worksheets

Chapter 2 Fill in the Worksheets

Chapter 3 Fill in the Screens

Appendix A Worksheets

List of Figures

List of Tables

Job Specification Worksheets

CHAPTER 1

SECTION 1 GENERAL INFORMATION

You can set up the digital voice mail system for a particular application quickly and easily.

An **application** is the way you set up the voice mail system at a site to meet individual needs. Every company has unique telephone communication requirements. The decisions you make about the company specific needs determine the way you set up the voice mail system.

SECTION 2 WHAT YOU SHOULD KNOW ABOUT YOUR SITE

The Quick Installation worksheets define everything that happens to a telephone call after it reaches an organization and how it is answered, transferred, and answered again. Before you begin filling out the worksheets, determine the answer to these questions:

Which trunks does the voice mail system answer?

This is the most important question to answer. Do you want the voice mail system to answer all trunks, so that all callers hear the voice mail system first and use it to route to the correct person? Do the receptionists answer the bulk of the calls, with the voice mail system answering only overflow calls during peak periods? Is the voice mail system used exclusively for voice messaging, answering only lines dedicated to that purpose?

What should the voice mail system say when it answers?

Should the different trunks be answered differently? Should A toll-free line require a special greeting? Do you want lines answered differently depending on whether it is day or night?

Do you want to use directory assistance?

Should callers be given a numeric or alphabetic directory of personnel?

Which calls should be transferred to an operator?

What happens when a caller without a touchtone telephone wants to go to the operator? Should the transfer be made automatically? What touchtone should callers press to get to the operator, and how many operator lines are there?

How should calls be transferred to extensions?

What happens after an extension is selected? Are calls answered differently for different individuals in the organization? Should the voice mail system ask for the caller name before transferring a call? If the extension doesn't answer or is busy, should the caller be given other choices or just leave a message?

Should internal calls forward to voice mail automatically?

What does the organization want to happen when someone calls an extension in the organization and it is not answered or is busy? Do they want the call to forward automatically to the voice mail system?

Do subscribers use message notification?

How do people want to be informed when they have messages? Will message waiting lamps be used? Is automatic calling of a telephone at certain hours required?

Does the organization use a fax machine?

Does the organization want to use fax detect? What telephone extension should the fax machine use? Should the voice mail system ask outside callers to record a message describing their fax? Should the voice mail system send a public notice each time a call is transferred to the fax machine?

SECTION 3
THE QUICK INSTALL METHOD

The Quick Install method organizes the answers to all of these questions to easily define an application that is structured around the most important considerations.

The Quick Install method includes worksheets that facilitate setting up your voice mail system. These should be completed at least one week prior to the scheduled installation date.

SECTION 4
ABOUT THIS MANUAL

The Quick Install method has two basic functions:

- Fill in the Worksheets

  The first half of this manual explains how to fill in each worksheet. After the worksheets are completed, you should have a solid understanding of what the application really is and how to make it successful. A complete set of blank worksheets is included in *Appendix A*.

  Worksheets 1-13 are basic worksheets that should be completed for **every** installation using automated attendant or voice mail features. Worksheets 14-17 are advanced worksheets that cover such features as automatic call routing, audiotext applications, interviews, multilingual systems, and numeric directory assistance. They should be completed only if required for the site application.

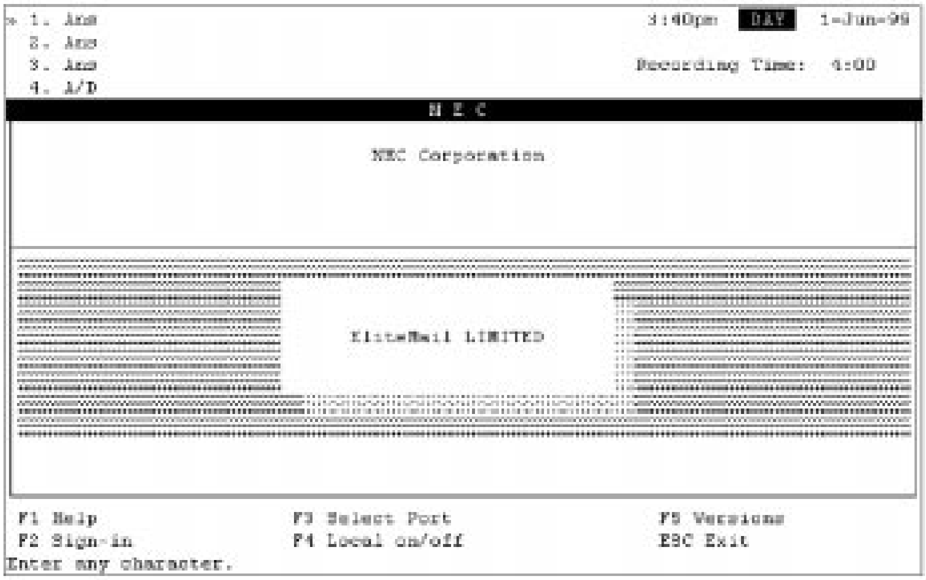
  Many system features are preset with default values when the software is shipped. **The default setting for an option is marked with *.**

- Fill in the Screens

  The second half of the manual helps you to fill in the system screens. After you complete the worksheets, it is easy to configure the system because the line numbers and blanks on the worksheets correspond with the field numbers and labels on the screen. Each worksheet identifies the corresponding system screen.

SECTION 5
ELITEMAIL LIMITED

Descriptions and procedures in this manual are intended for both EliteMail Limited and EliteMail VMS. Refer to Figure 1-1 EliteMail Limited Banner Screen. The only difference between the banner screens should be the system title and the recording time. The differences that make the EliteMail Limited unique are described below.



```
> 1. Ans                                              3:40pm  DAY   1-Jun-99
  2. Ans
  3. Ans                                            Recording Time:  4:00
  4. A/D
                                   N E C
                             NEC Corporation

                            EliteMail LIMITED

 F1 Help                F3 Select Port                F5 Versions
 F2 Sign-in             F4 Local on/off               ESC Exit
Enter any character.
```

NEC Corporation should read NEC America, Inc.

Figure 1-1 EliteMail Limited Banner Screen

Refer to Figure 1-2 FMS( )-U10 ETU. The 64 MB IDE Flash Memory module is configured as a single-drive partition for the Electra Elite 48 telephone system (it can also be used in the Electra Elite 192). System configuration and differences are described below.

✆ System Configuration

  - 40 subscriber mailboxes
  - 2 or 4 ports
  - 4 hours message storage and live recording time
  - Single system language

✆ EliteMail Limited has No softkey or Live Monitoring ability, but they are being considered as add-on options.

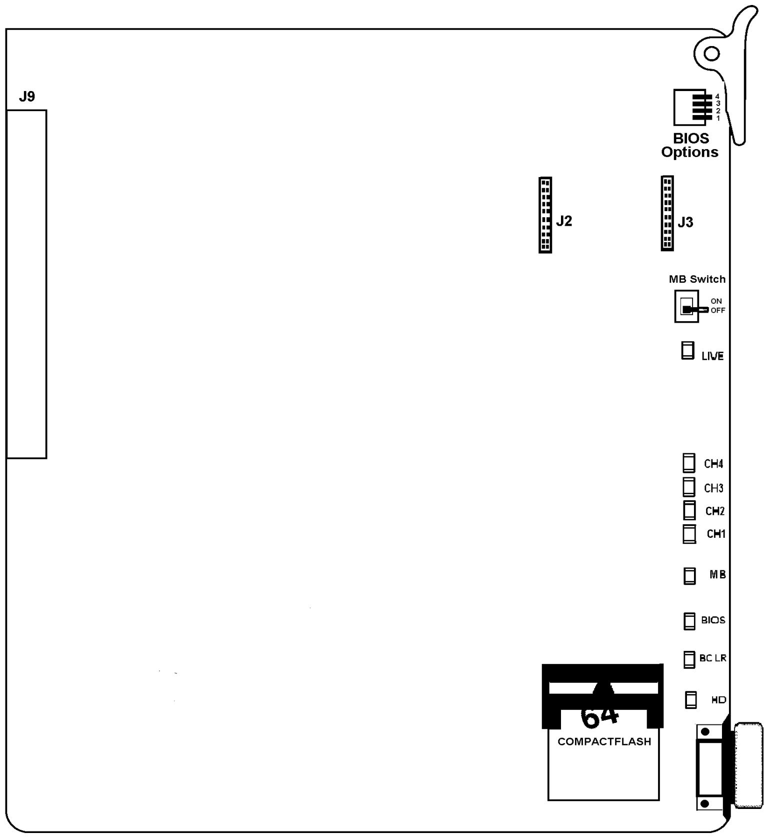


Figure 1-2 FMS( )-U10 ETU

✆ Available Recording Space Warning

The Disk Full warning at 15 mins left field on Easymade Application Page 6 also sets the minimum storage space allowed for live record messages. For EliteMail Limited only, subscribers are prevented from using live record when the available storage space is less than or equal to twice the indicated disk full warning value.

☞ Live record messages can quickly fill up available storage space. Subscribers are encouraged to promptly delete all unnecessary voice and live record messages.

Fill in the Worksheets

Chapter 2

Section 1
Worksheet 1:
Site Information

Use this worksheet to collect information about the NEC telephone system that may be helpful to a service technician in the future. Although providing the information on Lines 1-6 has **no** effect on how the voice mail system operates, filling in this worksheet is a good way to keep the information in one place.

1. Site name

Enter the name of the site where the voice mail system is installed.

2. Contact name and telephone

Enter the name of the contact person at the site. The person is usually a System Manager. Enter the work telephone number of the contact person, including the extension number.

Calls Answered

3. Total number of trunks/Total number of stations

Enter the number of trunks and stations in the NEC telephone system.

Number of calls per day

Enter the average daily number of calls the telephone system handles.

4. Day calls /Night calls to be answered

Select the calls the voice mail system answers, and when. It can answer all incoming calls or only certain trunks, depending on the site needs. You can also set whether or not it answers calls differently during normal office hours (Day Mode) than after hours (Night Mode). Your choices are:

- All trunks

  The system is a primary automated attendant and answers all incoming calls. Callers may reach an operator or receptionist if they press a particular touchtone or have a telephone that lacks touchtones.

- Some trunks

  A live operator answers most calls. The system is a back door automated attendant to answer either overflow calls or incoming calls on a particular set of trunks.

- No trunks

  An operator answers all incoming calls first, then may forward certain calls to the voice mail system. In this configuration, the system automated attendant features are not used.

5. Action to Take for Overflow Calls

Choose how the voice mail system handles incoming calls when all its ports are busy:

- Ring system until it answers

  When all ports are busy, an incoming call continues to ring until an EliteMail port is free. If the system is being used as an automated attendant, this causes all outside ports to be handled by EliteMail. Ensure that the number of ports on the system can handle the call traffic you expect.

- Forward calls to Operator

  When all EliteMail ports are busy, an incoming call is forwarded to a live operator.

- Issue busy tone

  When all EliteMail ports are busy, incoming callers hear a busy signal. They must hang up and call back.

System Access Numbers

6. Trunk Pilot Number

Enter the telephone number that outside callers dial to reach the voice mail system. Leave this field blank if the voice mail system only answers forwarded calls.

Number of trunks answered by system

Enter the number of trunks that the voice mail system answers.

Alternate trunk numbers

Enter other published telephone numbers that outside callers use to reach the system, such as 800 numbers and service numbers.

7. Voice Port Stations

Enter the number of voice mail ports on the system.

Station Pilot Number

Enter the extension or telephone number that subscribers use to dial the voice mail system internally. This is also called the *master hunt group number*.

Station Number for each voice mail system port

Enter the physical station number of the NEC telephone system that is connected to each port of the voice mail system. (*e.g.*, a 4-port system has only 4 blanks filled in.)

Telephone System Information

Keypad Map

Indicate which keypad map the voice mail system uses. The keypad map defines how letters and numbers are arranged on the touchtone keypad. The system supports several keypad maps, including a numbers-only map. The keypad map is set automatically during installation.

If the numbers-only keypad map is used, subscribers send messages to other subscribers, guests, and message groups by pressing numbers instead of letters. You can also set up numeric directory assistance for outside callers.

If you want to set the system for a keypad map other than the default, you must run a special utility.

For details about the numbers-only keypad map, numeric directory assistance, or changing the keypad map, refer to the EliteMail VMS/ EliteMail Limited Technician Guide.

Table 2-1 Sample Worksheet 1 – Site Information

Worksheet 1 Site Information

1. Site name The Franklin Shipping Company

2. Contact name Jonathan Winter

Telephone#214-555-1000

Calls Answered

3. Total number of trunks 12
Total number of stations 75

Number of calls per day 800

4. Day calls to be answered (select one)
■ All trunks
☐ Some trunks
☐ No trunks (forwarded calls only)

Night calls to be answered (select one)
■ All trunks
☐ Some trunks
☐ No trunks (forwarded calls only)

5. Action to take for overflow calls, when all system ports are busy (select one)
■ Ring system until it answers (System answers as soon as a port is free.)
☐ Forward calls to Operator (Live Operator handles overflow calls.)
☐ Issue busy tone

System Access Numbers

6. Trunk pilot number 214-555-1000
Alternate trunk numbers 800-555-2001

Number of trunks answered by system 4

7. Voice Port Stations 4

Station pilot number 71

Station Number for each port:

1. 201 2. 202 3. 203 4. 204
5. ____ 6. ____ 7. ____ 8. ____
9. ____ 10. ____ 11. ____ 12. ____
13. ____ 14. ____ 15. ____ 16. ____
17. ____ 18. ____ 19. ____ 20. ____
21. ____ 22. ____ 23. ____ 24. ____
25. ____ 26. ____ 27. ____ 28. ____
29. ____ 30. ____ 31. ____ 32. ____
33. ____ 34. ____ 35. ____ 36. ____

Application Screen Page 1

Telephone System Information

Manufacturer NEC

Model Electra Elite

Software Release #

Switch Setup Screen Page 1

Keypad Map
☐ Default (Q=7, Z=9)
☐ QZ on the 1 Key
☐ QZ on the 0 Key
☐ Swedish Keypad
☐ Numbers Only Keypad

SECTION 2 WORKSHEET 2: THE OPENING GREETING

You should customize the opening greeting for your application. Ensure that the quality of the recording is good. Keep background noise to a minimum, and don't overwhelm callers with a long list of options. Include the name of your organization, and be sure to thank people for calling.

This worksheet helps you plan your opening greeting. You can set up different opening greeting prompts for the system Day Mode and Night Mode.

Greeting

Day Greeting / Night Greeting

Enter the text of the day and night greetings for the transaction box.

The caller hears either the day or night greeting when call transfer is turned off, or the extension is busy or does not answer.

Use one-key dialing during greeting?

If this transaction box uses one-key dialing, enter the System IDs.

The one-key dialing menu lets you set up single digits to represent full System IDs for other transaction boxes, interview boxes, or extension numbers. Enter an existing System ID for each single digit the caller may press. As you record the greeting, include pauses in your recording so the caller has time to make a selection.

One-key dialing lets the caller press a single digit during or after the greeting; the system translates that single digit to the corresponding System ID, and routes the call accordingly.

Action After Greeting

Select the action, for Day and Night Mode, the system should take if the caller doesn't press touchtones during the greeting.

If greeting is not recorded, the voice mail system takes this action immediately.

You may specify a different action to be taken during Day Mode than during Night Mode. The possible actions are described below.

✆ Take a message

Take a message from the caller. This is the most commonly used option.

- Transfer to operator

  Transfer the caller to the operator.

- Say Good-bye

  The system says *“If you need further assistance, press the pound key now. Thank you and good-bye”* and hangs up.

- Hang up

  The system hangs up, without saying good-bye.

- Go to another ID

  The system routes the caller to another System ID you enter.

- Restart the call

  Except in special applications, return the call to the opening greeting that answered the call.

If Take a Message is Used

If you want the transaction box to take a message, answer the rest of the questions on the worksheet.

- Maximum Message Length

  Enter maximum time in seconds a message from an outside caller can last.

- Allow caller to edit message?

  Specify if callers should be asked if they want to record again or add to their message to the subscriber.

- Mark the messages urgent?

  Indicate how the system marks the priority of messages from outside callers. Select **Yes** to automatically mark **all** messages from outside callers urgent. Select **No** to leave messages from outside callers unmarked. Choose **Ask** if you want the system to **ask** outside callers if the message should be marked urgent.

✆ Action after message?

Choose how the system handles callers after they record a message. The system cannot take another message. The possible choices are:

- Transfer to operator

  Transfer the caller to the operator.

- Say Good-bye

  The system says *“If you need further assistance, press the pound key now. Thank you and good-bye”* and hangs up.

- Hang up

  The system hangs up, without saying good-bye.

- Go to another ID

  The system routes the caller to another System ID you Enter.

- Restart the call

  Except in special applications, return the caller to the opening greeting that answered the call.

Table 2-2 Sample Worksheet 2 – The Opening Greeting

Worksheet
2

The Opening Greeting

The opening greeting is recorded in a default transaction box ($Greeting). You may select the default prompt or write an announcement suitable for your application. Also identify what should happen if the caller does not respond to the prompts.

System ID $Greeting

Call Transfer

Transfer the calls reaching this box to an extension?
Day hours ☐ Yes, to extension ■ No
Night hours ☐ Yes, to extension _____ ■ No

Call transfer type ■ Await Answer for 4 rings (3 rings or more) ☐ Release ☐ Wait for Ringback for ___ rings (3 rings or more)

Transfer options ■ **A**nnounce ☐ **C**onfirm ☐ **I**ntroduce ☐ **M**essage Screen ☐ **S**creen ☐ None
(Use only with Await Answer call transfer)

Use call holding? ☐ Yes ☐ Vox ■ No
(Do not use with Release call transfer)

Greeting

Day Greeting I'm sorry, all of our technicians are answering other calls. Please hold and I'll connect you to an operator.
Night Greeting You've reached our network support desk after hours. You may leave a message for our technicians. Be sure to include your telephone number. ________________

Use one-key dialing during greeting? ☐ Yes ■ No

1= ________ 2 = ________ 3 = ________ 4 = _________ 5 = _________
6 = ________ 7 = ________ 8 = ________ 9 = _________ 0 = _________

Action After Greeting

Day	**Night**	(check one box for Day hours and one box for Night hours)
☐	☐	Say "Goodbye" then hang up
■	☐	Transfer the caller to the operator
☐	☐	Restart the call at the opening greeting
☐	☐	Route the call to another subscriber or transaction box (Use Go-to-ID →)
☐	☐	Interview the caller (Use Go-to-ID→ $PM)
☐	■	Take a message

If taking message:
Maximum Message Length 180 seconds Allow caller to edit message? ■ Yes ☐ No
Mark the messages urgent? ☐ Yes ☐ No ■ Ask
Action after message? Say Goodbye

Transaction Directory

SECTION 3
WORKSHEET 3: OPERATOR HANDLING

When callers reach your organization during normal business hours, they must have easy access to an operator. Callers need to know how and when they can be connected to an operator.

20. When is an operator available to handle calls?

Identify when an operator is available to answer calls. Most organizations have operator coverage only during normal business hours. Operator availability during night hours varies widely from one organization to another.

If operator is not available for either day or night, check the No boxes and go to the next worksheet.

Transferring Calls to the Operator

What is the operator extension number?

Enter the actual operator extension number on the NEC telephone system, both for day and night. At many organizations, the operator extension number is 0. If your operator has a different extension number, fill in the blank with the number. The voice mail system automatically dials this extension when transferring a call to your operator. The extension numbers can be different for Day Mode and Night Mode.

Call transfer type to use for the operator extension

The voice mail system can transfer a call to the operator three ways. If you are not sure which to use, select Release, the most common method for transferring to the operator.

✆ Release

The voice mail system puts the caller on hold, dials the extension and then releases the call to the NEC telephone system. The voice mail system does not check the progress of the call or the status of the called extension. If the extension is busy or not answered, the telephone system determines what happens to the call.

Releasing a call to the operator clears the voice mail system port to take other calls.

✆ Await Answer

The voice mail system puts the caller on hold and dials the operator. If the operator answers within the number of rings specified in the **rings** field, the voice mail system puts the caller through.

If the extension is busy or does not answer within the specified number of rings, the voice mail system plays the operator greeting and then takes an action (typically, goes to a special interview box). For details on this call transfer type, refer to the EliteMail VMS/EliteMail Limited Technician Guide.

✆ Wait for Ringback

The voice mail system puts the caller on hold and dials the operator extension. If the extension rings the number of times specified in the **rings** field, the voice mail system releases the call to the NEC telephone system.

If the extension is answered while the voice mail system is counting rings, the voice mail system puts the call through. If the extension is busy, the voice mail system plays the extension greeting and takes the specified action. The operator **cannot** use call screening features. For details on this call transfer option, refer to the EliteMail VMS/EliteMail Limited Technician Guide.

✆ rings

This specifies the number of rings the voice mail system waits for a call to be answered. The minimum number of rings is three.

Enter the number of rings for your application. Using three or four rings is recommended.

Table 2-3 Sample Worksheet 3 – Operator Handling

Worksheet **3**	**Operator Handling**

20. When is an operator available to handle calls?

Day ☒ Yes ☐ No
Night ☐ Yes ☒ No

Transfer Calls to the Operator

What is the operator extension number on the telephone system? **Day** ☒ 0 (zero) ☐_____

Night ☐ 0 (zero) ☐_____

Call transfer type to use for operator extension ☒ Release
☐ Await Answer for ______ rings
☐ Wait for Ringback for ______ rings
(3 rings or more)

Application Screen Page 3

SECTION 4
WORKSHEET 4: SYSTEM SCHEDULES

Most organizations set regular working hours. You can set up the voice mail system to handle calls differently when your organization is open and closed. The voice mail system uses a Day Mode schedule to define the hours your organization is open. The rest of the time the system operates in Night Mode.

You can define up to four different Day Mode schedules, and then assign to different voice ports or transaction boxes different Day Mode schedules. In most cases, however, you use only Schedule #1. This worksheet defines only one schedule. You can define others later.

31. Daytime Schedule

Enter regular business hours for your organization. Sample completed Schedules Worksheet is shown below.

Each working schedule you define for a site can be specified in three different time ranges. These ranges (a, b, c) define the hours classified as Day Mode. You may specify any range as Day Mode; it need not fall in the range that is normally considered daytime. For any hours *not* specified, the voice mail system operates in Night Mode.

Typically, you specify only one range, such as 8:00 am - 5:00 pm Monday through Friday. However, if your organization has different weekend hours, you may specify ranges for Saturday and Sunday. The sample schedule is completed for a business that is open from 9:00 am to 8:00 pm Monday through Friday; from 10:00 am to 5:00 pm on Saturday, and 11:00 am to 3:00 pm on Sunday.

If your organization closes for lunch hour, you can specify Day hours as 8:00 am to 12:00 pm in range a and 1:00 pm to 5:00 pm in range b. The voice mail system is then in Night Mode from noon to 1:00 pm.

Ignore holidays?

In most cases, because your organization is closed on holidays, you want the voice mail system to operate in Night Mode for 24 hours on those days. This is the default setting. If Schedule #1 should **not** follow your regular Day Mode and Night Mode hours on official holidays (that is, if you want Schedule #1 to operate in Night Mode for 24 hours) select No and fill in **33. Holidays**. If you want the system to follow your regular Day and Night schedule on holidays, select Yes, and skip the **33. Holidays** section of the worksheet.

32. Schedule #4

Schedule #4 is a special schedule that stays in either Day Mode or Night Mode 24 hours a day, all days a year. The mode does not change unless you change it at the console. Use Schedule #4 to set a group of ports or transaction boxes to stay in a particular mode regardless of the time of day. By changing the setting of Schedule #4, you can reset all the ports or transaction boxes that use Schedule #4. This field has no effect on Schedules #1, #2, or #3.

33. Holidays

At most sites, the voice mail system operates in Night Mode for 24 hours on any day marked as a holiday. You may specify up to 18 holidays. List only the day and month for each holiday. You must update the holiday schedule each year to cover holidays that fall on a different date each year.

34. Automatically adjust system for Daylight Savings Time?

The voice mail system can automatically adjust its internal clock for Daylight Savings Time in those countries and locations that recognize it.

Select **Yes** if you want the voice mail system to adjust for Daylight Savings Time, and enter the dates when Daylight Savings Time changes. If you select **No**, you may still manually reset the computer clock twice a year for Daylight Savings Time.

Table 2-4 Sample Worksheet 4 – System Schedules

Worksheet
4

System Schedules

Use this worksheet to define the system Day Mode operating schedule. This usually matches the company office hours. All other hours the system operates in Night Mode. You may specify up to three ranges of hours and days for Day Mode operation.

31. Daytime Schedule (Enter up to three ranges of hours and days for Schedule #1)

a: 9:00 [✓ **am**] **/ pm** to 8:00 **am /** [✓ **pm**] on [✓ **M**on] [✓ **T**ue] [✓ **W**ed] [✓ T**H**u] [✓ **F**ri] **S**at S**U**n
b: 10:00 [✓ **am**] **/ pm** to 5:00 **am /** [✓ **pm**] on **M**on **T**ue **W**ed T**H**u **F**ri [✓ **S**at] S**U**n
c: 11:00 [✓ **am**] **/ pm** to 3:00 **am /** [✓ **pm**] on **M**on **T**ue **W**ed T**H**u **F**ri **S**at [✓ S**U**n]

Ignore holidays? ☐ Yes ■ No

32. Special Schedule (#4) ■ Day ☐ Night

33. Holidays (Write in the day and month of up to eighteen holidays)

1-Jan 25-Dec ____________ ____________ ____________ ____________
____________ ____________ ____________ ____________ ____________ ____________
____________ ____________ ____________ ____________ ____________ ____________

34. Automatically adjust system for Daylight Savings Time?

■ Yes Date On 1-Apr Date Off 28-Oct
☐ No

Application Screen Page 4

SECTION 5 WORKSHEET 5: DEFAULT SUBSCRIBER SETTINGS

This worksheet helps you plan the default settings for every new subscriber.

EliteMail makes adding subscribers with standard features quick and easy. Just fill in Application Screen Page 5 with the settings you want for each subscriber. Then, each new subscriber you add has the settings you choose on this default screen. This saves you time, because you do not have to configure each subscriber individually. Of course, you can still change any setting for any particular subscriber that wants settings different from the default.

Use this worksheet to specify default settings for: Personal IDs, feature access, call transfer, message waiting lamps, and message delivery.

Personal ID and Access Codes

Personal ID for Subscribers

First, write down the convention you want the system to use when creating Personal IDs for the subscribers.

On the default setup, when you add a new subscriber, the system automatically creates a unique Personal ID for the subscriber by adding 9 to the beginning of the subscriber Extension # ID (write as **9X**). You can change 9 to another number or string of numbers plus X (the extension number).

☞ Although you do not have to base the Personal IDs on extension numbers, this saves you from having to think of a unique Personal ID each time you add a subscriber to the system.

If you want to change the default convention, enter that on the worksheet.

Access Codes

Set up the access codes for each subscriber. Access codes allow or deny particular features, such as special delivery options, the enrollment conversation, and if subscribers can send open group messages. Specify any combination except M and T of the following access codes:

A	**No Setup Options Access** This denies subscriber access to change setup options by telephone. The subscriber cannot change personal greetings, message groups, call transfer options, message delivery, recorded name, spelled name, security code, or directory listing. The access codes A and T may be combined to deny access to all setup options *except* personal greetings.
B	**No Receipt Summary** The system does not tell the subscriber that the messages sent to a particular person are received, unless the subscriber marks a message for explicit return receipt.
C	**No Public Notify** This prevents the system from notifying the subscriber when a public message is received. A public message is not addressed to a particular extension. Use this code for subscribers who have public message access (no P code) but want their message waiting lamp lit only for messages sent specifically to them.
D	**Not in Directory** Excludes subscriber from automatic directory.
E	**Messages by Extension** The subscriber leaves messages by extension number instead of the first three letters of the last name.
F	**First-Time Enroll** The system enrolls the subscriber by telephone the next time the subscriber calls the system. The system does **not** deliver messages to subscriber with the **F** access code.
G	**Can’t Edit Greeting** The subscriber cannot change personal greetings.
I	**Live Monitor On?** Enables Live Monitoring for the subscriber. ☞ Upgrade option on EliteMail Limited.

J	**Auto Live Monitor** Sets enabled Live Monitoring to automatic mode. ☞ Upgrade option on EliteMail Limited.
K	**Can Edit Hold** The subscriber can change call holding by telephone.
L	**Message Length** The system announces how long new and old messages last, for example *“You have 3 new messages totaling 3 minutes, 20 seconds. Would you like to hear them?”*
M	**Menu Mode Exclusively** The subscriber hears the system quick option menus for all voice mail features, instead of the usual yes-and-no conversation. This code cancels the **T** access code.
N	**Hands-Free Play** This code turns on handsfree message retrieval. The system does not ask the subscriber *“Would you like to hear them?”* between message sources.
O	**No Old Messages** The subscriber cannot review old messages.
P	**No Public Messages** The subscriber cannot access public messages. Usually, only one or two people at any site need access to public messages.
Q	**No Urgent Messages** The subscriber cannot mark messages urgent.
R	**Can’t Redirect** The subscriber cannot redirect received messages.
S	**Can’t Send Message** The subscriber cannot leave messages for other subscribers, guests, or groups.
T	**Traditional Order** The subscriber hears four basic questions in this order: Check new messages, Leave messages, Change greetings, Review old messages. To reach setup options other than greetings, press # # after the system asks *“Would you like to do anything else?”*. The **M** access code cancels this code.

U	**Not to Subscribers** The subscriber cannot send messages to other subscribers. The subscriber can leave messages for guests and message groups.
V	**No Private Messages** The subscriber cannot mark messages private. Any message the subscriber sends may be redirected by the recipient.
W	**No Future Delivery** The subscriber cannot mark messages for future delivery.
X	**No Receipt Request** Subscriber cannot mark messages for explicit return receipt. The subscriber cannot cancel a return receipt marked automatically by the system.
Y	**No Open Groups** The subscriber cannot create open message groups, or leave messages for open message groups. The subscriber can still create and leave messages for private message groups.
Z	**Automatic Receipts** The system automatically marks *every* message sent by the subscriber for return receipt requested. ☞ To avoid redundant return receipts and receipt summary announcements, never use this code without also using the **B** access code.

Call Transfer

Transfer calls to subscribers?

Select **Yes** if you want the voice mail system to transfer calls to subscribers. When call transfer is **Yes**, the voice mail system transfers callers to the actual subscriber extension. If the extension is busy or does not answer, the caller may leave a message.

If you select **No**, callers may leave a message in a subscriber voice mailbox, but they cannot directly reach a subscriber extension without going through the operator. Select **No** if you want to use voice mail only.

Call transfer type

Select the call transfer method to apply to the subscribers. The voice mail system can transfer a call to a subscriber in the following ways:

✆ Await Answer

The voice mail system puts the caller on hold and dials the extension. If the extension is answered within the number of rings specified in the **rings** field, the voice mail system puts the call through.

If the extension is busy or does not answer within the specified number of rings, the voice mail system plays the extension greeting and then takes an action (usually takes message).

✆ Release

The voice mail system puts the caller on hold, dials the extension and then releases the call to the NEC telephone system. Voice mail system does not check call progress or the status of the called extension. If the extension is busy or unanswered, the caller can leave a message when the extension is set up to forward calls to voice mail.

Releasing a call to an extension clears the voice mail system port. The subscriber **cannot** use call holding or call screening.

✆ Wait for Ringback

The voice mail system puts the caller on hold and dials the extension. If the extension rings the number of times specified, the voice mail system releases the call to the NEC telephone system.

If the extension is answered while the voice mail system is counting rings, the voice mail system puts the call through. If the extension is busy, the voice mail system plays the extension greeting and takes the specified action. The subscriber **cannot** use call screening. For details on this call transfer type, refer to the EliteMail VMS/EliteMail Limited Technician Guide.

✆ Use call screening?

This feature lets subscribers find out who is calling before the voice mail system puts the call through. When call screening is turned on, the voice mail system asks callers, *"Who may I say is calling?"* before transferring the call to the subscriber extension. When the subscriber answers the call, the voice mail system plays the caller name before putting the call through. You can only use call screening with Await Answer call transfer.

✆ Use call holding?

This feature allows you to queue up several callers who are waiting for a busy extension to become free. The voice mail system periodically tells callers their position in the queue, and allows them to hold, transfer to another extension or leave a message.

The system provides two types of call holding. You can set the system either to allow outside callers to press 1 or to say ***"Yes"*** to hold. With the first type, outside callers must have a touchtone telephone. With the second type, outside callers do not need a touchtone telephone. The system uses the system voice detect feature.

Call holding is available with Await Answer and Wait for Ringback call transfer. Call holding is not available with Release call transfer.

On the worksheet, select **Yes** if callers should press a touchtone to hold. Select **Vox** if callers should say ***"Yes"*** to hold. Select **No** if call holding should be turned off for subscribers by default.

Message Notification

When a subscriber or guest has messages pending, the voice mail system can light a message waiting lamp to notify the subscriber. This feature, called message notification, is available with your NEC telephone system.

Activate message waiting lamps for new messages?

Select whether or not you are using message waiting lamps. The voice mail system supports message waiting lamps automatically on all NEC telephone systems. Select **Yes** to use message waiting lamps to notify subscribers with pending messages. Message waiting lamps should be used when they are available.

Message Delivery

The voice mail system can notify subscribers for pending messages. For example, when a message comes in, the voice mail system can dial the subscriber extension number, wait for an answer, and then say:

"This is the voice mail system calling with a message for <subscriber name>. Please enter your Personal ID now to receive the message."

If the subscriber enters the correct Personal ID (and security code, if applicable), the voice mail system proceeds with the conversation in the same way that it does when the subscriber calls the voice mail system directly.

Should the system call the subscriber extension?

Check **Yes** if you want messages delivered to each subscriber work telephone, as described above. If **No**, skip the rest of this worksheet.

Wait ___ minutes after a new message arrives

Check to select, and enter the time you want the system to wait before delivering new messages. This field applies to Batch message delivery only. Enter the days and times you want the voice mail system to call you to deliver your messages. Select the number of times the voice mail system rings a subscriber extension on each delivery attempt.

Each, Batch, or Urgent Delivery

Select whether you want Each, Batch or Urgent delivery. Also, enter the time (in minutes) between delivery attempts.

- ✆ Each

  The voice mail system calls the subscriber each time a new message comes in, regardless of when it last tried to call the subscriber. This method speeds up the delivery of new messages, but also increases system dial out time. This means that the dial-out ports may be tied up more frequently. If the dial-out ports are constantly busy, the voice mail system may have to hold dial-out requests in a queue until a dial-out port is free. This could cause delivery delays.

- ✆ Batch

  Any message that comes in since the last attempted delivery is added to the batch and delivered at the next specified time interval. A 30-minute delivery time is suitable for most installations. Using batch message delivery lessens the time the voice mail system ties up voice ports dialing out to deliver messages.

- ✆ Urgent

  Urgent message delivery works like Each message delivery, except the voice mail system only calls you when an urgent message comes in. The system won’t call when new messages that are not urgent are waiting.

Table 2-5 Sample Worksheet 5 – Default Subscriber Settings

Worksheet 5

Default Subscriber Settings

Use this worksheet to specify settings that apply to *most* subscribers, including settings for Personal IDs, how calls are transferred, if message waiting lamps are used, and if the system calls the subscriber to deliver messages. Although these settings apply to most subscribers, you may specify custom settings for individual subscribers on another worksheet.

Personal ID & Access Codes

The system automatically assigns a Personal ID to a new subscriber by adding one or more digits to the subscriber extension (X). For example, 9X creates a Personal ID of 9100 for extension 100.

Access codes allow or deny subscribers particular features of the system. See the *Application Manual* or the system on-line help for access code definitions.

	Default	Change to:
Personal ID for Subscribers	9X	______________________
Access Codes	PCBF	______________________

Call Transfer

Transfer calls to subscribers? ☒ Yes ☐ No

Call transfer type

☒ Await Answer for 4 rings
☐ Release
☐ Wait for Ringback for ______ rings
(3 rings or more)

Use call screening? ☐ Yes ☒ No
(Use only with Await Answer call transfer)

Use call holding? ☐ Yes ☐ Vox ☒ No
(Do not use with Release call transfer)

Message Notification

Activate message waiting lamps for new messages? ☒ Yes ☐ No
(The telephone system must be programmed to support message waiting lamps or indicators)

Message Delivery

Should the system call the subscriber extension to deliver new messages? ☒ Yes ☐ No

☐ Wait 30 minutes after a new message arrives before trying to call.
Hours to deliver: 8:00 **am** / **pm** to 5:30 **am** / **pm** on **M**on **T**ue **W**ed T**H**u **F**ri **S**at S**U**n
Ring the extension for **4** rings before hanging up (3 or more rings)

Choose one of the following:
☐ Deliver **each** new message as it arrives. If no answer, try again every _____ minutes.
☒ Deliver a **batch** of new messages every 30 minutes.
☐ Deliver **urgent** messages, as soon as they arrive. If no answer, try again every _____ minutes.

Application Screen Page 5

SECTION 6

WORKSHEET 6: SYSTEM SECURITY

The voice mail system offers system-wide features that protect the system from unauthorized access and from certain system errors.

Use Table 2-6 Sample Worksheet 6 – System Security to identify:

- Number of times a caller is allowed to misdial
- If caller should be routed to another System ID for help after misdialing
- The minimum available message storage space the system requires
- Who should receive a voice message if certain system errors occur.

53. How many times should caller be allowed to misdial?

Identify the number of times a caller is allowed to misdial. This includes the number of times an outside caller can try to enter a valid System ID to route the call, and the number of times a subscriber can try to enter a valid Personal ID and security code.

Should caller be routed to another System ID for help after misdialing repeatedly?

Identify how the system handles a caller who exceeds the number of invalid entries allowed. At most sites, the system is set to hang up on callers who misdial the number of times specified. However, the system can also route callers to another System ID for additional help. For example, you could route these callers to the operator, who can help determine the correct Extension # ID or Box ID.

55. When should the system ask subscribers to delete unnecessary messages?

Identify the minimum minutes of available message storage space the system requires before asking subscribers to delete unnecessary messages. To help prevent the system from running out of storage space, the system asks subscribers to delete unnecessary messages when space is getting low. Most systems set the minimum to 15 minutes. You should not decrease this amount. However, you may increase it for larger systems with many subscribers or ports.

56. Who should receive a voice message if a system error occurs?

Identify who should receive a voice message if a system error occurs.

If a system error occurs, the system can display a text message at the system console, or, for some errors, can also send a voice message.

Most systems are set to send a voice message to everyone with public message access (no **P** access code). A public message is a special message available only to authorized subscribers. If you choose to send error messages to subscribers with public message access, ensure that you set at least one subscriber for public message access when you complete Table 2-12 Sample Worksheet 12 – Special Subscriber Settings. You may also want to remove the **C** access code for subscribers with public message access, so the system can call them or light a lamp when new public messages are waiting.

You may also specify one or more specific subscribers who should receive these messages. This may or may not be the same subscribers who receive public messages. Write each subscriber name and Personal ID on the worksheet.

For details about public messages or error messages, refer to the EliteMail VMS/EliteMail Limited Technician Guide.

Table 2-6 Sample Worksheet 6 – System Security

Worksheet **6**	**System Security**

Use this worksheet to specify several system-wide features that protect your system from unauthorized access and from certain system errors.

53. How many times should a caller be allowed to misdial?

☒ 4 times ☐ ____________ times

Should a caller be routed to another System ID for help after misdialing repeatedly?

☒ No (system hangs up) ☐ Yes, route to System ID _____________

55. When should the system ask subscribers to delete unnecessary messages?

☒ When less than 15 minutes of message storage space is left

☐ When less than ________ minutes of message storage space is left

58. Who should receive a voice message if a system error occurs?

☐ Everyone who receives public messages

☒ These subscribers: Name: Jonathan Winter Personal ID: 92219

Name: ____________________________ Personal ID: _________

Name: ____________________________ Personal ID: _________

Application Screen Page 6

SECTION 7 WORKSHEET 7: DIRECTORY ASSISTANCE

People who call your organization may not know the extension number of the person they are trying to reach. The caller must then speak to the operator to find the extension or look up the extension in a directory.

The voice mail system offers two kinds of directory assistance to help outside callers determine a subscriber extension:

✆ **Automatic directory assistance**

The automatic directory provides a list of subscriber names and extensions. Outside callers get a subscriber extension by spelling the first three letters of the last name. Outside callers must have letters on their touchtone keypads to use automatic directory assistance.

✆ **Numeric directory assistance**

The numeric directory allows outside callers to press numbers instead of letters to look up a subscriber extension. Numeric directory assistance groups subscribers by a common characteristic (such as department, location, or schedule), and creates a menu of choices that assign a single touchtone to each directory grouping.

Use Worksheet 7 to select the type of directory assistance to offer outside callers. Or, if you are not using directory assistance for this application, write that on the worksheet, and skip to the next worksheet. If you are using numeric directory assistance, you should also complete Table 2-11 Sample Worksheet 11 – Message Groups.

☞ You can also use transaction boxes to set up other call routing for outside callers who do not know the extension number. The system comes with a sample transaction box (Departments Box) to help you set up special call routing to departments.

Directory Assistance

Some sites may want to use both automatic and numeric directory assistance if some outside callers have lettered keypads.

Indicate the type of directory assistance the system should offer. You can offer automatic directory assistance, numeric directory assistance, or both.

Using automatic directory assistance requires only that outside callers have letters on their keypad that match the system keypad map, and that you mention the System ID for directory assistance in the opening greeting. Using numeric directory assistance or transaction boxes for directory assistance requires additional setup at the system console.

If you are using automatic directory assistance, the system can automatically route a caller to the correct Extension # ID when only one name matches the three letters the caller enters. Indicate on the worksheet whether you want to use this feature with automatic directory assistance.

System IDs for Directory Assistance

Enter on the worksheet the System ID callers should dial to reach directory assistance. The default System ID for automatic directory assistance is 555. If you are changing the System ID, enter that information on the worksheet.

Numeric directory assistance requires special configuration at the system console. The system comes with several sample directory groups installed to help get you started. For details on how to set up numeric directory assistance, refer to the EliteMail VMS/EliteMail Limited Technician Guide.

Ensure that the System ID for directory assistance is mentioned in the opening greeting.

Notes on the Department Transaction Box

The system is shipped with a department directory in a transaction box that has the System ID $411. This transaction box announces:

“Press 1 for Sales, 2 for support, or 3 for a list of all personnel. Once again: press 1 for Sales, 2 for Support, or 3 for a list of all personnel.”

To use this department transaction box, you can modify the greeting or System ID to fit your application. If the system uses the default department transaction box, indicate that on the worksheet. Otherwise, enter remove on the worksheet.

Table 2-7 Sample Worksheet 7 – Directory Assistance

Worksheet 7

Directory Assistance

The voice mail system offers an automatic directory of extensions, numeric directory assistance, and a special Departments transaction box to help callers find out the extension number of the person or department they are trying to reach. Use this worksheet to choose the directory assistance the system provides.

Directory Assistance

	Default ID	Change to:	Make change on:
■ Automatic directory assistance	555	_______	*Application Screen Page 6*
Should the system automatically route the caller if there is only one matching name in the automatic directory? ■ Yes ☐ No			
☐ Numeric directory assistance	$411	_______	*Groups Screen*
☐ Departments transaction box	411	_______	*Transaction Directory*

SECTION 8
WORKSHEET 8: PUBLIC FAX BOX

The voice mail system can detect incoming faxes and route them to a fax machine. This feature eliminates the need for a separate, dedicated telephone line for the fax machine. Each time the system transfers a call to the fax extension, it can send a public announcement to the Public Fax Box.

If you plan to use the voice mail system fax detect feature, complete this worksheet. Specify the fax extension number, System ID, and call transfer parameters. Also, indicate whether or not the person sending the fax is asked to record a message describing the fax.

The Public Fax Box is quite flexible. For details on the various options available, refer to the EliteMail VMS/EliteMail Limited Technician Guide.

Fax ID

Indicate the System ID for the Public Fax Box. You can choose an ID that allows callers to manually dial the fax machine extension, or make it accessible only when a fax machine calls the system. In the opening greeting, tell callers what System ID to dial to send a fax.

By default, the System ID is set to $_FAXBOX. If the System ID begins with the $ symbol, callers cannot select the fax machine by pressing touchtones. Thus, the system can only route automatic faxes sent directly from a fax machine.

Voice Name

Indicate whether you want to change the Public Fax Box recorded name, *The Public Fax Box*. If you decide to change the recording, enter the name you want to use.

Transfer calls to the Public Fax Box?

To use the fax detect feature, you must indicate the actual telephone extension the fax machine is connected to. Select Yes, and enter the fax machine extension number.

Call transfer type

Select the transfer method that the voice mail system uses for the Public Fax Box. The voice mail system can transfer a call using: Await Answer, Release, or Wait for Ringback.

- ✆ Await Answer

  The voice mail system reminds the caller to press the Start button on the fax machine at the fax tone, puts the caller on hold, then dials the fax extension. If the extension is answered within the number of specified rings, the voice mail system waits for the caller to press the Start button, then puts the fax through.

  If the extension is busy or does not answer within the specified number of rings, and call holding for the fax extension is turned off, the voice mail system takes the alternate action (typically, transfer to the operator).

- ✆ Release

  The voice mail system puts the caller on hold, dials the fax extension and then releases the call to the NEC telephone system. The voice mail system does not check the progress of the fax call or the status of the fax extension.

  Releasing a call to the fax extension clears the voice mail system port to take other calls. However, the caller cannot hold for the fax machine.

- ✆ Wait for Ringback

  The voice mail system puts the caller on hold and dials the fax extension. If the extension rings the number of specified times, the voice mail system releases the call to the NEC telephone system. The number of rings should be at least three.

If the fax extension is answered while the voice mail system is counting rings, the voice mail system puts the fax call through. If the extension is busy and call holding for the fax extension is turned off, the voice mail system takes the alternate action (typically, transfer to the operator).

Use call holding?

Indicate whether or not caller can hold if the fax extension is busy. To use call holding, you must use Await Answer or Wait for Ringback call transfer.

The system provides two call holding types. You can set the system so that outside callers can press **1** or say ***"Yes"*** to hold for an extension. With this first type, outside callers must have touchtone telephones. With the second type, outside callers do not need touchtone telephones: The system listens for spoken sound, using the system voice detect feature.

On the worksheet, select **Yes** if callers should press a touchtone to hold for the Public Fax Box. Select **Vox** if callers should say ***"Yes"*** to hold. Select **No** if call holding should be turned off for the Public Fax Box by default.

Alternate Action

Indicate how the system should handle the caller if the transfer to the fax extension is unsuccessful (and call holding is not allowed). The most common choice is transfer to operator. The possible actions are as follows:

- Say Good-bye

  The system says *"If you need further assistance, press the pound key now. Thank you and good-bye"* and hangs up.

- Transfer to operator

  Transfer the caller to the operator.

- Restart the call

  Return the caller to the opening greeting.

- Go to another ID

  The system routes the caller to another System ID. Enter the System ID if you choose this option.

- Hang up

  The system hangs up, without saying good-bye.

Announce Options

Indicate if the system should send a public notice when it transfers a call to the fax machine, and if it asks the person sending a manual fax to record a message describing the fax and who it is for. Values include: **Always**, **Voice**, **Post**, and **Never**.

	Ask Caller to Record a Message?	**Notify when Fax Call is Transferred?**
Always	Yes	Yes
Voice	Yes	Only when caller records a voice message
Post	No	Yes
Never	No	No

If you use fax notification, the fax notice is delivered to the Operator Box and received by any subscriber who has public message access. (Typically, this is the operator or System Manager.)

Table 2-8 Sample Worksheet 8 – Public Fax box

Worksheet 8 Public Fax Box

You can route incoming faxes to a particular extension, called the Public Fax Box. This extension is then connected to one or more fax machines. Use this worksheet to specify how to set up the Public Fax Box. If you are not using the Public Fax Box, you may skip this worksheet.

Fax ID: ☐ $_FAXBOX ■ FAX (329) ☐ Other: ____________________
Voice Name: ☐ *“...the Public Fax Box...”* ☐ Other: ____________________
NOTE: If you use the default Fax System ID, callers cannot dial the Public Fax Box directly.

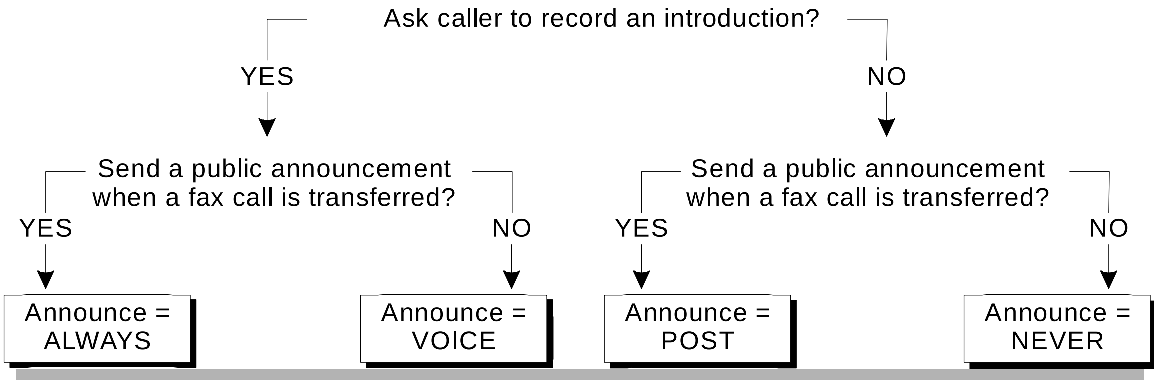
Transfer calls to the Public Fax Box? ■ Yes, to extension 345 ☐ No (Turn off Public Fax Box)
Call transfer type ■ Await Answer for 4 rings ☐ Release ☐ Wait for Ringback for ___ rings
Use call holding? ■ Yes ☐ Vox ☐ No (Do not use holding with Release call transfer type)

Alternate Action: (if fax call transfer is unsuccessful)

- ☐ Say Goodbye then hang up
- ■ Transfer the call to the operator
- ☐ Restart the call at the opening greeting
- ☐ Route call to another subscriber or transaction box (Use Go-to-ID -> ______)
- ☐ Hang up

Announce Options

Use this decision chart to decide how to handle manual fax calls and how to announce calls that are transferred to the Public Fax Box. Circle the choice you want for Announce=.


Ask caller to record an introduction?
YES
NO
Send a public announcement when a fax call is transferred?
YES
NO
Send a public announcement when a fax call is transferred?
YES
NO
Announce = ALWAYS
Announce = VOICE
Announce = POST
Announce = NEVER

Application Screen Page 6

SECTION 9
WORKSHEET 9: SUBSCRIBER LIST

Subscribers can be enrolled on the system by range or individually. There are advantages and disadvantages to each method.

Before you fill in, read Ways to Enroll Subscribers below to decide which method to use.

If you enroll subscribers by range, use worksheet to list starting and stopping Extension # ID of each range.

If you enroll subscribers individually, use worksheet to list the extension number and name of each subscriber you want to add to the system. If you already have a list of subscribers, use it instead of this worksheet.

Ways to Enroll Subscribers

- ✆ A System Manager can enter each subscriber ID and spelled name, record a name, and set any special options to enroll individual subscribers at the console.
- ✆ A System Manager can add a range of subscriber mailboxes with the **F** access code, and let subscribers enroll themselves by telephone when they first call the system.

When using enrollment by telephone, the System Manager may want to go through the Personal Directory in ID sort order and enter the full name of each subscriber.

Extension # ID Range 1, 2 and 3

If you decide to add subscribers by range, write down the starting and stopping Extension # ID of each range. If you have more than three ranges, make copies of the worksheet.

Extension / Last Name / First & Middle Names

Enter each subscriber you want to add to your system, in extension number order, beginning with the lowest extension number. This makes it easier to add the subscriber to the system later.

Unlisted

Indicate if any subscribers should **not** be listed in directory assistance.

Some subscribers may not want to be in directory assistance, so that outside callers can’t get their extension number without asking the operator. If the site uses automatic directory assistance, subscribers can change their automatic directory listing by telephone anytime, by accessing setup options. If the site uses numeric directory assistance, only a System Manager can add or remove someone in the numeric directory.

Table 2-9 Sample Worksheet 9 – Subscriber List

Worksheet
9

Subscriber List

Page 1 of 1

To add subscribers **by range**, list the range of Extension IDs (for example, 210-320). To add subscribers **one-by-one**, make copies of this worksheet and create a list of all subscribers. For each person, enter the full name and extension number, with the lowest extension first. Check off any subscriber you do **not** want listed in directory assistance. If you have a list or directory of all personnel and their extension numbers, you may use it in place of this worksheet.

Extension # ID Range 1 Start: **220** Stop: **241**
Extension # ID Range 2 Start: **247** Stop: **360**
Extension # ID Range 3 Start: ____________ Stop: _____________

EXTENSION	**LAST NAME**	**FIRST & MIDDLE NAMES**	**UNLISTED**
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐
________	______________________________	________________________	☐

Personal Directory Screen

SECTION 10
WORKSHEET 10: GUESTS

Some subscribers may wish to provide more personal call handling for special clients, contacts, friends, or family. Rather than accessing the system as outside callers, these individuals can be enrolled as guests of a particular subscriber. Each guest receives a Personal ID. The system greets guests by name and gives them immediate access to their host subscriber voice mailbox.

A guest can leave messages for the host subscriber and receive messages from the host subscriber the same way other subscribers leave two-way messages.

Use this worksheet to list each guest on the system, and the guest host subscriber. Be sure to ask subscribers to identify guests they would like added to the system.

Host Subscriber

List the name of the subscriber who hosts the guest. Only the subscriber host can leave messages for the guest and receives two-way messages from the guest.

Guest Name

List the guest name. There is no limit to the guests a subscriber may host. If the system uses a lettered keypad, the host can use the first three letters of the guest last name to leave messages for the guest. Otherwise, the host can use the guest Personal ID.

Guest Personal ID

Enter the Personal ID the guest uses to access messages from the host subscriber. Like any other System ID, the guest Personal ID must be unique. For details, refer to the EliteMail VMS/EliteMail Limited Technician Guide.

Urgent?

Specify if the guest can send urgent messages to the host subscriber.

Table 2-10 Sample Worksheet 10 – Guests

Worksheet **10**	**Guests**	
Page 1 of 1		Page 1 of 1

A subscriber may have one or more guests. Guests can leave and receive messages on the system, but only with their host subscriber. Guests are usually important clients, family members, or others with whom a subscriber wants regular, two-way communication. Copy this worksheet and enter each host subscriber, guest name, and guest Personal ID. If the subscriber wants to receive the guest messages as urgent messages, check the urgent block.

HOST SUBSCRIBER	GUEST NAME	GUEST PERSONAL ID	URGENT?
Doug Wood	Alice Wood	925423	☐
	Brian Wood	94437	☐
	Jaime Wood	9559	☐
			☐
James Cole	Alan Green	92626	■
			☐
			☐
Bob Thompson	Helen Thompson	943536	☐
			☐
			☐
			☐

Personal Directory Screen

SECTION 11
WORKSHEET 11: MESSAGE GROUPS

The voice mail system lets you create message groups of subscribers to make it easy to send the same message to several people at once. When you send a message to a **message group**, it is available to all members of the group.

Subscribers can create and maintain their own message groups from any touchtone telephone. A System Manager can also create and maintain message groups at the system console.

This worksheet helps you plan the message groups created at the console. Make a copy of the worksheet for each message group you plan to add.

Considerations

When you add message groups to the system, consider the following:

✆ **Does the system keypad map have letters or numbers only?**

If the system uses a lettered keypad map, message group names may begin with three letters. Subscribers send a message to a group by spelling the group name using the touchtone keypad.

If some or all subscribers have only numbers on their keypads, choose a System ID for sending messages to numbered groups. Group names should begin with three numbers. Subscribers send messages to groups by pressing the System ID for numbered groups, then the group number.

✆ **Can anyone but the owner send a message to the group?**

A message group can be **open** or **private**. All authorized subscribers can send messages to open message groups. A private message group belongs to a single subscriber, called the group **owner**. Only the group owner can send messages to a private group. The members of a private group can hear group messages, but they cannot **send** messages to the group.

✆ **Should the message be delivered only to the first person who hears the message?**

A message group can have **broadcast** or **dispatch** distribution. With broadcast distribution, every member of the group receives a copy of the message. With dispatch distribution, only the first person to hear the message receives it.

Spelled Names or Numbered Names

Indicate whether the message groups on the system should begin with three letters or three numbers. If message group names begin with numbers, also indicate the System ID subscribers press before leaving group messages.

The special System ID for numbered groups must be unique. The number should be short (two or three digits), to speed the flow of the conversation (the system prompts a subscriber for the System ID each time a subscriber leaves a message). Remember that the ID you choose prevents you from using a range of other System IDs. For example, using 14 for the special System ID for numbered groups makes the ranges 140~149 and 1400~1499 unavailable.

Group Name or Number

Indicate the name or 3-digit number of the message group. Remember that subscribers use the message group name or number to leave messages for the group.

For sites using spelled-name groups, carefully consider the names you give open groups. Subscribers use the first three letters of the group name to send messages to it, so the name you choose should be easy to remember. For example, it would be easier to remember that entering **ALL** sends a message to a group containing all staff than to remember to enter **EMP** for the same group that was named employees.

For sites using numbered groups, a 3-digit group number is not a System ID, so it does not have to be unique.

☞ You should not use your system wildcard character (usually 1 or 0) in the group number.

You can have more than one message group with the same spelled name or group number. If this occurs, subscribers choose the correct group by listening to the group recorded name, just as they do when choosing between subscribers with the same last name.

Group Owner

Enter the name of the subscriber that owns this group. Only the owner of the group can change the group by telephone.

Deliver message only to the first person to hear it?

Select whether the group has dispatch or broadcast distribution. Most groups have broadcast distribution.

Can others send a message to this group?

Indicate whether the message group is open or private.

If the group is open, all authorized subscribers can send messages to the group. If the group is private, only the group owner can send messages to the group.

Group Members

List the names of the subscribers included in the group. Any subscriber can be a member of a group. A guest can be a member only of the host private message groups.

Table 2-11 Sample Worksheet 11 – Message Groups

Worksheet 11	**Message Groups**

Page 3 of 9

If a subscriber wants to regularly send messages to a group of other subscribers or guests, create a message group. Subscribers can also create their own message group by telephone. Decide whether message groups should begin with letters or numbers. If message groups begin with numbers, include the special System ID for sending group messages. For each group you need, enter the group name or number and the group owner. Indicate if the owner is the *only* person who can send messages to the group. A group can also be set for dispatch distribution, so that only the *first* person to hear the message actually receives it.

Select message groups by name or by number?

☒ Use named groups (Message group names begin with 3 letters)
☐ Use numbered groups (Message group names begin with 3 numbers)
System ID for numbered groups: ____________ *(Application Screen Page 6)*

Group Name or Number: Sales	Group Owner: Jonathan Winter
Deliver message *only* to the first person who hears it? ☐ Yes (DISPATCH distribution) ☒ No	Can someone besides the owner send a message to this group? ☒ Yes (OPEN group) ☐ No (PRIVATE group)

Group Members

Ron Shadbolt
William Richmond
James Cole
Diana Peck

Groups Screen

SECTION 12 WORKSHEET 12: SPECIAL SUBSCRIBER SETTINGS

It is easy to customize features for individual subscribers with special needs. The System Manager can change the values on a subscriber Personal Directory page to configure features individually for any subscriber, anytime. Subscribers can also change many features themselves from any touchtone telephone.

Make a copy of Table 2-12 Sample Worksheet 12 – Special Subscriber Settings for each subscriber that requires a configuration different from the default settings you entered on Table 2-5 Sample Worksheet 5 – Default Subscriber Settings. Then, complete a separate worksheet for each subscriber to document the customized features.

Personal data

✆ Name

Enter the name of the special subscriber.

✆ Personal ID

Enter the subscriber Personal ID. You may change the Personal ID to something other than the default numbering scheme, but each subscriber Personal ID must be unique.

✆ Extension # ID

Indicate the ID outside callers press to reach the subscriber telephone or voice mailbox. The best Extension # ID is usually the same as the subscriber actual telephone extension number, but it doesn’t have to be.

✆ Hold / Archive Messages

If different from the default subscriber settings, indicate the number of days the system saves old and archived messages.

✆ Access Codes

To Indicate the features you want to turn on or turn off, enter the access code for those features. An access code is a single letter that turns on or off a specific feature for a subscriber. You can specify any combination except M and T of the access codes listed in the Worksheet 5 discussion.

Call Transfer

Transfer calls to subscriber?

Indicate if call transfer should be turned on (**Y**/**N**). When call transfer is turned on for a subscriber, the voice mail system transfers incoming calls to the subscriber extension. The subscriber can turn call transfer on or off from any touchtone telephone.

If you select **N**, outside callers may still leave a message in the subscriber voice mailbox, but they cannot directly reach the subscriber extension without going through the operator. Select **N** if the subscriber uses voice mail only.

Call transfer type

Select the call transfer type that the voice mail system uses for the subscriber. The voice mail system can transfer a call to a subscriber using Await Answer, Release, or Wait for Ringback.

✆ Await Answer

The voice mail system puts the caller on hold and dials the extension. If the extension is answered within the range of specified rings, the voice mail system puts the caller through.

If the extension is busy or does not answer within the specified number of rings, the voice mail system plays the extension greeting and then takes an action (usually take message).

✆ Release

The voice mail system puts the caller on hold, dials the extension and then releases the call to the NEC telephone system. The voice mail system does not check the progress of the call or the status of the called extension. If the extension is busy or is not answered, the caller can leave a message only when the telephone system supports Call Forward to Personal Greeting.

Releasing a call to an extension clears the voice mail system port to take other calls. However, the subscriber **cannot** hold or screen calls.

✆ Wait for Ringback

The voice mail system puts the caller on hold and dials the extension. If the extension rings the number of specified times, the voice mail system releases the call to the NEC telephone system.

If the extension is answered while the voice mail system is counting rings, the voice mail system puts the call through. If the extension is busy, the voice mail system plays the extension greeting and takes the specified action. The subscriber **cannot** screen calls.

Turn screening options on?

When call screening is turned on, the system uses the screening options to control how calls are transferred to the subscriber extension.

Use call holding?

Indicate if the subscriber uses the voice mail system call holding feature. The call holding feature allows you to queue up several callers who are waiting for a busy extension. The voice mail system periodically tells callers their position in the queue, and allows them to hold, transfer to another extension, or leave a message.

The system provides two types of call holding. You can set the system so that outside callers can either press **1** or say ***"Yes"*** to hold for an extension. With the first type, outside callers must have touchtone telephones. With the other type, outside callers do not need touchtone telephones: The system listens for spoken sound, using the system voice detect feature.

Call holding is available with Await Answer and Wait for Ringback call transfer. Call holding is not available with Release call transfer.

On the worksheet, select **Yes** if callers should press a touchtone to hold for the subscriber extension. Select **Vox** if callers should say ***"Yes"*** to hold. Select **No** if call holding should be turned off for the subscriber by default.

Transfer options

Indicate which call transfer options the subscriber uses. Transfer options control how the voice mail system transfers calls to the subscriber and are active only when call transfer is turned on and set to Await Answer. Choose any or all of the following options:

✆ Announce (A)

The subscriber hears a beep before being connected to a caller.

✆ Confirm (C)

The subscriber hears *“Please press 1 to take the call or 2 and I’ll take a message.”* The subscriber can press1 to be connected to a caller.

✆ Introduce (I)

The subscriber hears “*Call for <subscriber recorded name>”* before being connected to a caller.

✆ Screen (S or M)

With S, The caller is asked, *“Whom may I say is calling?”*, then the system records the caller name. Before the call is transferred, the subscriber hears *“Call from <caller name>.”* The M option also adds the caller name to a message the caller leaves. Do not use both options at the same time.

✆ Screening options

If the subscriber uses call screening, indicate which transfer options the subscriber uses when call screening is turned on. You can use call screening only with Await Answer call transfer.

In most cases, you use at least **M** and **C** for the screening options. The call screening feature lets subscribers find out who is calling before the voice mail system puts the call through.

Choose any single or multiple options: **A, C, D, I, M,** or **S** described above under Transfer Options. (Do not use **M** and **S** at the same time.)

Action After Greeting

Specify how you want the voice mail system to handle callers after they listen to the subscriber personal greeting. Choose one of the following options:

✆ Take a message

Take a message from the caller. This is the most commonly used option.

✆ Other Action

Transfer the caller to the operator, restart the call, go to another ID, or hang up. Except in special applications, return the caller to the opening greeting that answered the call.

✆ If taking a message

If the system is to take a message after the greeting, specify:

- Maximum Message Length ___

  Enter the maximum time (in seconds) for messages from outside callers.

- Allow caller to edit message?

  Specify whether or not callers are asked if they want to record again or add to their message to the subscriber.

✆ Mark the messages urgent?

Select how the system marks the priority of messages from outside callers.

- Select **Yes** to automatically mark **all** messages from outside callers urgent.
- Select **No** to mark **none** of the messages from outside callers urgent.
- Select **Ask** if you want the system to **ask** outside callers if the message should be marked urgent.

✆ Action after message?

Choose how you want the system to handle the callers after they record a message for the subscriber. You cannot have the system take another message. The possible choices are:

- Transfer to operator
- Say Good-bye
- Hang up
- Go to another ID
- Restart the call.

✆ Use one-key dialing during greeting?

Select whether or not callers can press single touchtones to route to other System IDs during the subscriber personal greeting. If **Yes**, indicate on the back of the worksheet which touchtones and System IDs are to be used.

Message Notification and Delivery

When a subscriber or guest has messages pending, the voice mail system can light a message waiting lamp or a special display or set a distinctive dial tone on the subscriber extension to notify the subscriber . This feature is supported by the NEC telephone system.

✆ Lamp #

Enter the number the voice mail system should dial to turn a message waiting lamp on or off for the subscriber. In most cases, use the subscriber extension number.

✆ Activate message waiting lamps for new messages?

Indicate if the voice mail system should activate message waiting lamps for the subscriber when new messages come in.

✆ For telephone #1 - #4

For *each* telephone number you want the voice mail system to call to deliver messages for the subscriber, enter the following:

- Phone #
  Enter the telephone number you want the system to dial.
- Wait _____ minutes

  Indicate time you want the voice mail system to wait after a new message arrives before dialing (batch message delivery only).
- Delivery Schedule

  Enter the time the voice mail system should start delivering messages and stop delivering messages. Circle the days of the week the voice mail system should follow this delivery schedule.

  Enter the number of times the voice mail system should ring before hanging up, and how long it should wait before trying the telephone number again.

Select one of the following delivery methods:

› Each

  The voice mail system calls the subscriber each time a new message comes in. This speeds up the delivery of new messages, but increases system dialing. The dial-out ports may be tied up more frequently. If the dial-out ports are constantly busy, the voice mail system may be delayed by holding dial-out requests in a queue until a dial-out port is free.

› Batch

  With Batch message delivery, any message that comes in since the last attempted delivery is added to the batch and delivered at the next specified time interval. A 30-minute delivery interval is suitable for most installations. This option decreases the time the voice mail system ties up system ports dialing out to deliver messages.

› Urgent

  Urgent message delivery works like Each message delivery, except the voice mail system only calls you when an urgent message comes in.

Table 2-12 Sample Worksheet 12 – Special Subscriber Settings

Worksheet
12

Special Subscriber Settings

Page 1 of 3

Name Jonathan Winter

Personal ID 92219

Extension # ID 221 Hold / Archive messages / days

Access Codes PCL

Call Transfer

Transfer calls to subscriber? ■ Yes ☐ No

Call transfer type ■ Await Answer for 6 rings ☐ Release ☐ Wait for Ringback for ____rings

(3 rings or more) (3 rings or more)

Turn screening options on? ■ Yes ☐ No **Use call holding?** ☐ Yes ☐ Vox ■ No

(Do not use with Release call transfer)

Transfer options ■ **A**nnounce ■ **C**onfirm ■ **I**ntroduce ☐ **M**essage Screen ☐ **S**creen ☐ None

Screening options ■ **A**nnounce ■ **C**onfirm ■ **I**ntroduce ☐ **M**essage Screen ☐ **S**creen ☐ None

(Use transfer and screening options only with Await Answer call transfer type)

Action After Greeting

■ Take a message ☐ Other Action ____

If taking message:

Maximum Message Length _____ seconds Allow caller to edit message? ■ Yes ☐ No

Mark the messages urgent? ☐ Yes ☐ No ■ Ask

Action after message? hang up

Use one-key dialing during greeting? ☐ Yes ■ No

Message Notification & Delivery

Lamp # 221 Activate message waiting lamps for new messages? ■ Yes ☐ No

(The telephone system must be programmed to support message waiting lamps or indicators)

Phone #1 221 Wait 0 minutes before trying to call.

Hours to deliver: 7:30 [✓ **am**] **/ pm** to 6:00 **am /** [✓ **pm**] on [✓ **M**on] [✓ **T**ue] [✓ **W**ed] [✓ T**H**u] [✓ **F**ri] **S**at S**U**n

Try for 6 rings before hanging up. Try again in 15 minutes.

Deliver ■ **Each** new message ☐ **Batches** of new messages ☐ **Urgent messages only**

Phone #2 555-1234 Wait 0 minutes before trying to call.

Hours to deliver: 6:30 **am /** [✓ **pm**] to 10:00 **am /** [✓ **pm**] on [✓ **M**on] [✓ **T**ue] [✓ **W**ed] [✓ T**H**u] [✓ **F**ri] **S**at S**U**n

Try for 6 rings before hanging up. Try again in 30 minutes.

Deliver ■ **Each** new message ☐ **Batches** of new messages ☐ **Urgent messages only**

Phone #3 555-1234 Wait 0 minutes before trying to call.

Hours to deliver: 10:01 **am /** [✓ **pm**] to 7:00 [✓ **am**] **/ pm** on **M**on **T**ue **W**ed T**H**u **F**ri **S**at S**U**n

Try for 12 rings before hanging up. Try again in 15 minutes.

Deliver ☐ **Each** new message ☐ **Batches** of new messages ■ **Urgent messages only**

Phone #4 ________________________ Wait _____ minutes before trying to call.

Hours to deliver: __________ **am / pm** to __________ **am / pm** on **M**on **T**ue **W**ed T**H**u **F**ri **S**at S**U**n

Try for ________ rings before hanging up. Try again in ________ minutes.

Deliver ☐ **Each** new message ☐ **Batches** of new messages ☐ **Urgent** messages only

Personal Directory Screen

SECTION 13 WORKSHEET 13: PUBLIC INTERVIEW BOX

This is a special interview box. Messages in the Public Interview Box are **public messages** that are available to subscribers with public message access. When no operator is on duty, the Public Interview Box collects messages from callers who don't know where to send their message.

By default, the Public Interview Box uses the System ID, $PM. Do not change this System ID.

☞ If using the Public Interview Box, remove the **P** access code from the subscriber Access field to set at least one subscriber for public message access. Most systems set the System Manager and the receptionist for public message access.

Questions

Enter the full text for each interview question. You are allowed up to 20 questions for the Public Interview Box. It is not limited to questions – you may want to make a statement. For example, at the end of all the questions, you might want to say ***"Thank you for your order."***

The Public Interview Box comes with six prerecorded questions, listed below:

1. *"I'm going to ask you several questions. After each, please reply. First, whom are you trying to reach?"*
2. *"Who is calling please?"*
3. *"At what number can you be reached?"*
4. *"What's this in reference to?"*
5. *"What additional message would you like to leave?"*
6. *"Thank you, I'll make sure your message gets attention."*

For each question you want to change, enter the maximum time (in seconds) for reply a caller may leave. For questions that normally have short replies, such as "What is your telephone number?" a reply time of 6 to 10 seconds is usually enough. For each question or statement that does not require a reply, enter a zero reply time.

Should Outside Callers Mark Messages Urgent?

Select how the system marks the priority of messages left in the Public Interview Box.

- Select **Yes** to automatically mark all messages from outside callers urgent.
- Select **No** to leave messages from outside callers unmarked.
- Select **Ask** if you want the system to ask outside callers if the message should be marked urgent.

Action after last question

Decide what action you want the voice mail system to take after asking the questions. The most common choices are Say Good-bye or Hang up. The possible actions are as follows:

- Transfer to operator

  Transfer the caller to the operator.

- Say Good-bye

  The system says, *"If you need further assistance, press the pound key now. Thank you and good-bye"* and hangs up.

- Hang up

  The system hangs up, without saying good-bye.

- Go to another ID

  The system routes the caller to another System ID. If you choose this option, enter the System ID.

- Restart the call

  Return the caller to the opening greeting.

Table 2-13 Sample Worksheet 13 – The Public Interview Box

Worksheet 13

The Public Interview Box

Page 1 of 3

The Public Interview Box is a special interview box owned by the system. When no operator is on duty, it can collect messages from callers who don't know where to send their message. The messages are delivered to all subscribers with public message access. There is only one Public Interview Box and it cannot be removed from the system. If you are not using the Public Interview Box, skip this worksheet.

Write in the questions to be asked the caller and the maximum time allowed for the caller answer.

System ID for Public Interview Box ☒ $PM ☐ Other ______________

Question	Max. Response (in seconds)
1. Who is calling, please?	6
2. Who are you trying to reach?	6
3. What is this in reference to?	9
4. At what number can you be reached?	9
5. What additional message would you like to leave?	45
6. ______________________________	
7. ______________________________	
8. ______________________________	
9. ______________________________	
10. ______________________________	
11. ______________________________	
12. ______________________________	
13. ______________________________	
14. ______________________________	
15. ______________________________	
16. ______________________________	
17. ______________________________	
18. ______________________________	
19. ______________________________	
20. ______________________________	

Should outside callers be allowed to mark messages urgent? ☐ Yes ☒ No ☐ Ask

Action after last question

☒ Say Goodbye then hang up
☐ Transfer call to operator
☐ Restart the call at the opening greeting
☐ Route the call to another subscriber or transaction box (use Go-to-ID ->)
☐ Hang up (The system does not say anything after the last question.)

Transaction Directory, Public Interview

SECTION 14 WORKSHEETS 14 & 15: MENUS AND INTERVIEWS MAP

By using transaction boxes, voice detect boxes, and interview boxes, you can set up the voice mail system to do more than transfer calls to subscriber telephones. You can offer menus to allow callers to select between departments, directories of services, or submenus. You can route callers to interview boxes, ask a series of questions, then route them to another transaction box. You can create practically unlimited special applications. For details, refer to the EliteMail VMS/EliteMail Limited Technician Guide.

Use Worksheets 14 and 15 to plan and create special call routing applications using transaction boxes and interview boxes. Use Worksheet 14, to draw a picture of the overall flow and structure of the application transaction boxes and interview boxes.

Then use Worksheet 15: Menus and Interviews List to write down the System IDs, names, and owners of all the transaction boxes, voice detect boxes, and interview boxes you need. Also indicate if the box routes callers to other System IDs, and if it uses one-key dialing.

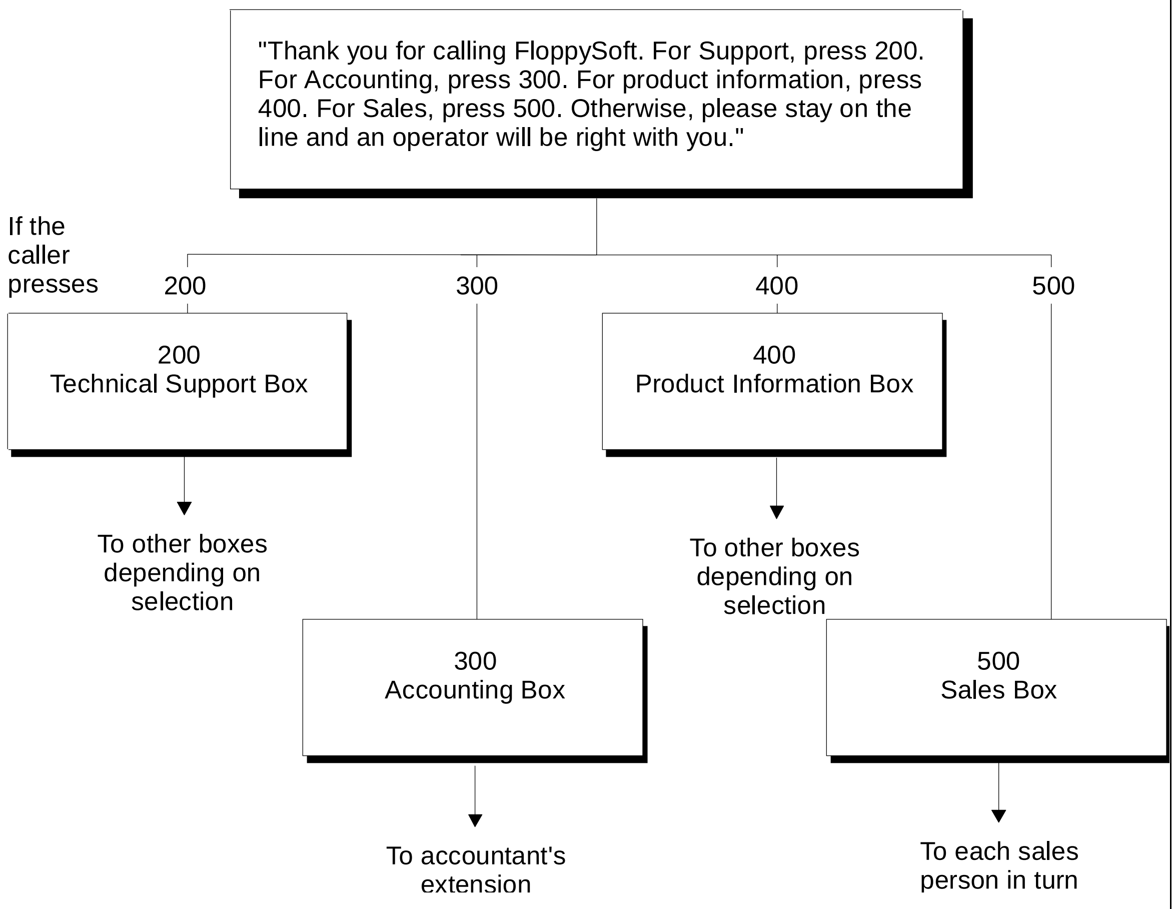
After you plan the overall scheme for your application, use copies of Worksheet 16 and Worksheet 17, to enter the specific requirements you have for each transaction box, voice detect box, or interview box.

The following application example should give you a feel for how you could use transaction boxes for call routing.

Table 2-14 Sample Worksheet 14 – Menus and Interviews Map

Worksheet 14	**Menus & Interviews Map**

Use this sheet to draw a map or diagram of any personnel directories, information menus, or special call routing you use in your application. You can then use the *Menus & Interviews List* worksheet to list the transaction boxes required for this part of your application.



"Thank you for calling FloppySoft. For Support, press 200. For Accounting, press 300. For product information, press 400. For Sales, press 500. Otherwise, please stay on the line and an operator will be right with you."

If the caller presses
200
300
400
500
200 Technical Support Box
400 Product Information Box
To other boxes depending on selection
To other boxes depending on selection
300 Accounting Box
500 Sales Box
To accountant's extension
To each sales person in turn

Example

A Directory of Departments

FloppySoft Corporation is used as an example name for a software company that plays this opening greeting for callers:

“Thank you for calling FloppySoft. For Technical Support, press 200. For Accounting, press 300. For product information, press 400. For Sales, press 500. Otherwise, please stay on the line and an operator will be right with you.”

Each selection in this menu corresponds to a System ID for a transaction box. In this example, the Technical Support transaction box with System ID 200 routes calls for a specific FloppySoft product, depending on the selection the caller makes. Refer to Figure 2-1 FloppySoft Menus and Interviews Map..

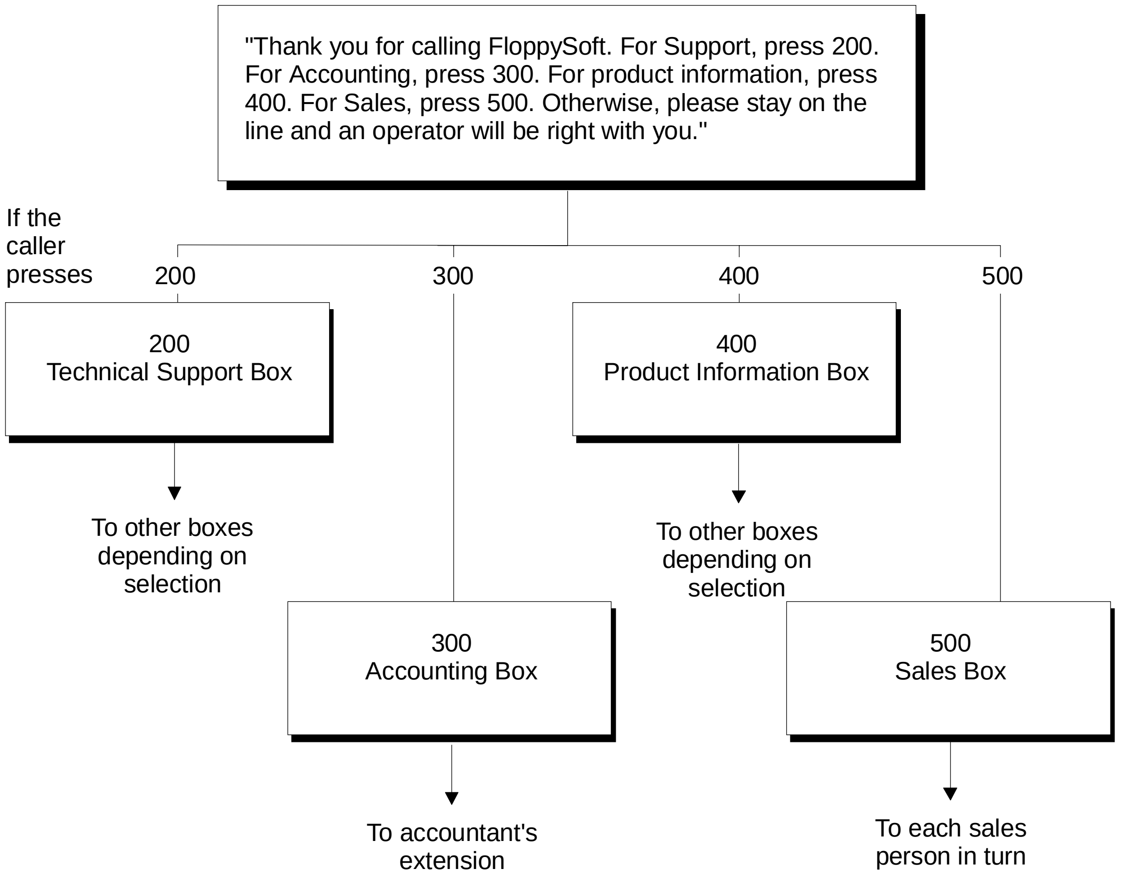

"Thank you for calling FloppySoft. For Support, press 200. For Accounting, press 300. For product information, press 400. For Sales, press 500. Otherwise, please stay on the line and an operator will be right with you."
If the caller presses
200
300
400
500
200 Technical Support Box
400 Product Information Box
To other boxes depending on selection
To other boxes depending on selection
300 Accounting Box
500 Sales Box
To accountant's extension
To each sales person in turn

Figure 2-1 FloppySoft Menus and Interviews Map

Table 2-15 Sample Worksheet 15 – Menus and Interviews Map

Worksheet 15	**Menus & Interviews List**
Page 1 of 4	

List here the transaction boxes or interview boxes you need to complete the application features designed in the previous worksheet. Make as many copies of this worksheet as you need. For each box listed here, you should also complete an individual *Transaction Box* or *Interview Box* worksheet.

System ID 200	Name Technical support Box	Owner Jonathan Winter
Transfer? ☐ Yes, to Ext. # ____ ■ No	Greeting ☐ None Press 1 for network, 2 for database, or 3 for Spreadsheet (pause). ■ Use One-Key Dialing	Action after Greeting Say - bye

System ID 300	Name Accounting	Owner Lisa Smith
Transfer? ■ Yes, to Ext. # 213 ☐ No	Greeting ☐ None I'm sorry, our accountant is not available. Please leave a message. ☐ Use One-Key Dialing	Action after Greeting Take a message

System ID 400	Name Product Information Box	Owner Jonathan Winter
Transfer? ☐ Yes, to Ext. # ____ ■ No	Greeting ☐ None For network, press 1. For database, press 2. For Spreadsheet, press 3. ☐ Use One-Key Dialing	Action after Greeting Say-bye

System ID 500	Name Sales Box	Owner Bob Thompson
Transfer? ■ Yes, to Ext. # 212 ☐ No	Greeting ☐ None Thank you! I'll transfer you to the next available representative. ☐ Use One-Key Dialing	Action after Greeting Go to 501

Transaction Directory

SECTION 15 WORKSHEET 15: MENUS AND INTERVIEWS LIST

Each Technical Support department transaction box routes calls to a hunt group. If technicians are unavailable, the voice mail system takes a message. Refer to Figure 2-2 FloppySoft Technical Support Menu Boxes.

200 Technical Support

Transfer	Greeting	Action
none	"Press 1 for NetWork, 2 for DataBase, or 3 for SpreadSheet (pause)."	Say-bye

One key dialing: 1> 201 2> 202 3> 203

201 NetWork Support

Transfer	Greeting	Action
Ext. 125	"I'm sorry, all our technicians are answering other calls. Please hold and I'll connect you to an operator."	Go to 0

202 DataBase Support

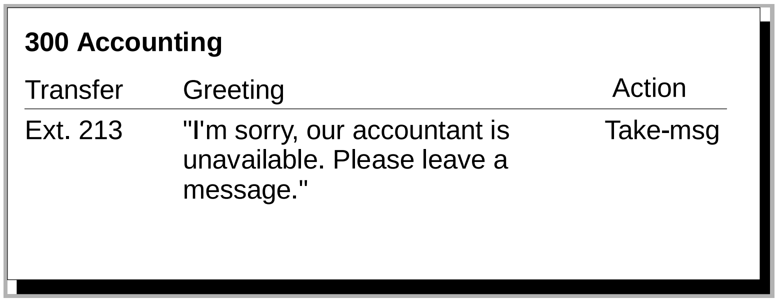
Transfer	Greeting	Action
Ext. 138	"I'm sorry, all our technicians are answering other calls. Please hold and I'll connect you to an operator."	Go to 0

203 SpreadSheet Support

Transfer	Greeting	Action
Ext. 126	"I'm sorry, all our technicians are answering other calls. Please hold and I'll connect you to an operator."	Go to 0

Figure 2-2 FloppySoft Technical Support Menu Boxes

The System ID 300 transaction box rings the company accountant. If the accountant does not answer, the voice mail system takes a message. Refer to Figure 2-3 FloppySoft Accounting Transaction Box.



300 Accounting

Transfer	Greeting	Action
Ext. 213	"I'm sorry, our accountant is unavailable. Please leave a message."	Take-msg

Figure 2-3 FloppySoft Accounting Transaction Box

System ID 400 is a transaction box linked to a series of transaction boxes in much the same way that the Technical Support department transaction boxes are linked together. Refer to Figure 2-4 FloppySoft Product information and Ordering Menu Boxes. The difference is that while the Technical Support department uses transaction boxes to route calls to the hunt groups, the product information line uses transaction boxes to provide information on each of its products.

400 Product Information

Transfer	Greeting	Action
none	"Press 1 for NetWork, 2 for DataBase, or 3 for SpreadSheet (pause)."	Say-bye

One key dialing: 1> 401 2> 402 3> 403

401 NetWork Information

Transfer	Greeting	Action
none	"Voted Product of the Year by Network Today magazine, FloppySoft Network Management is the perfect tool for any office using personal computers.To order NetWork, press 1."	Go to 400

One key dialing: 1> 404

402 DataBase Information

Transfer	Greeting	Action
none	"FloppySoft DataBase is a full-featured, robust database program. To order FloppySoft DataBase, press 1."	Go to 400

One key dialing: 1> 404

403 SpreadSheet Information

Transfer	Greeting	Action
none	"FloppySoft's SpreadSheet is an arithmetically dynamic spreadsheet. To order SpreadSheet, press 1."	Go to 400

One key dialing: 1> 404

404 Order Interview Box

Question 1:	"What product would you like to order?"
Question 2:	"What is your telephone number?"
Question 3:	"What is your shipping address?"
Question 4:	"To what purchase order number should this be billed?"

Figure 2-4 FloppySoft Product information and Ordering Menu Boxes

System ID 500 is a transaction box that is linked to several other transaction boxes. Refer to Figure 2-5 FloppySoft Sales Hunt Group Boxes. Each box routes calls to a specific sales representative. Incoming callers who do not dial the number of a specific representative are routed to the first transaction box in the chain.

The first box attempts to route the caller to a sales representative. If the sales representative is not available, the voice mail system routes the caller to the next transaction box in the chain, that repeats the attempt.

500 Sales Hunt Group Boxes

Transfer	Greeting	Action
none	"Thank you! I'll transfer you to the next available sales representative."	Go to 501

501 Sales Representative 1

Transfer	Greeting	Action
Ext. 163	"Please hold while I try another extension."	Go to 502

502 Sales Representative 2

Transfer	Greeting	Action
Ext. 164	"Please hold while I try another extension."	Go to 503

503 Sales Representative 3

Transfer	Greeting	Action
Ext. 101	"Please hold while I try another extension."	Go to 504

504 Sales Representative 4

Transfer	Greeting	Action
Ext. 135	"Please hold while I try another extension."	Go to 505

Figure 2-5 FloppySoft Sales Hunt Group Boxes

This cycle continues until the caller reaches a sales representative, or until the system has tried to reach every sales representative in the hunt group. At this point, the system transfers the caller to the operator. Refer to Figure 2-6 Final Box in FloppySoft Sales Hunt Group.

505 Sales Representative 5

Transfer	Greeting	Action
Ext. 131	"All of our sales representatives are currently handling other calls. I'll transfer you to an operator so that your call gets attention."	Go to 0

Figure 2-6 Final Box in FloppySoft Sales Hunt Group

SECTION 16
WORKSHEET 16: TRANSACTION BOXES

After you plan the overall flow of your transaction boxes, voice detect boxes, and interview boxes and complete the Menus and Interviews List, you must specify how each box in your application works.

First, make a copy of this sheet for each transaction box you need. Then, complete a worksheet for each transaction box.

System ID

Enter the transaction box System ID.

Name

Enter a name for the transaction box that describes the purpose, such as Customer Information Box. If the system is set for a lettered keypad, the owner can use the first three letters of the box name to record a greeting for the box by telephone. Otherwise, the owner can use the box System ID.

Owner

Enter the name of the subscriber who owns the transaction box. This person can listen to the box messages and record the box greetings.

Call Transfer

Transfer the calls reaching this box to an extension?

Indicate if you want calls reaching this transaction box to be transferred to a telephone extension during Day Mode or Night Mode.

- ✆ Select Yes, and enter the extension number if callers reaching the transaction box should be immediately transferred to an extension. Callers do not hear the transaction box greeting before being transferred.
- ✆ Select No to turn call transfer off for this transaction box.

Call transfer type

Select transfer type the voice mail system uses for this transaction box: Await Answer, Release, or Wait for Ringback.

- ✆ Await Answer

  The voice mail system puts the caller on hold and dials the extension. If the extension is answered within the number of specified rings, the voice mail system puts the call through.

  If the extension is busy or does not answer by the specified number of rings, the voice mail system plays the extension greeting and then takes an action (usually takes message).

- ✆ Release

  The voice mail system puts the caller on hold, dials the extension and then releases the call to the NEC telephone system. The voice mail system does not check the progress of the call or the status of the called extension. If the extension is busy or is not answered, the caller can leave a message when the extension is set up to forward calls to voice mail.

  Releasing a call to an extension clears the voice mail system port to take other calls. However, the box **cannot** use call holding or call screening.

✆ Wait for Ringback

The voice mail system puts the caller on hold and dials the extension. After the extension rings the number of specified times, the voice mail system releases the call to the NEC telephone system.

If the extension is answered while the voice mail system is counting rings, the voice mail system puts the call through. If the extension is busy, the voice mail system plays the extension greeting and takes the specified action. The box **cannot** screen calls.

Transfer options

Indicate call transfer options the transaction box uses. These options control how the voice mail system transfers calls to the subscriber who answers the telephone when a call is transferred from this transaction box. These options are active only when call transfer is turned on. Choose any or several of the following options:

✆ Announce (A)

The person who answers the telephone hears a beep before being connected to the caller.

✆ Confirm (C)

The person who answers the telephone hears *“Please press 1 to take the call or 2 and I’ll take a message.”* You must press 1 to be connected to a caller.

✆ Introduce (I)

The person who answers the telephone hears *“Call for <box name>“* before being connected to a caller.

✆ Message Screen (M or S)

With S, the caller is asked, *“Whom may I say is calling?”*, then the system records the caller name. The **M** option adds the caller name to a message the caller leaves. Before the call is transferred for **S**, the person who answers the telephone hears *“Call from <caller name>.”* Do not use these options at the same time.

Greeting

Day Greeting / Night Greeting

Enter the text of the day and night greetings for the transaction box.

The caller hears either the day or night greeting when call transfer is turned off or the extension is busy or does not answer.

Use one-key dialing during greeting?

If this transaction box uses one-key dialing, enter the System IDs.

The one-key dialing menu lets you set up single digits to indicate full System IDs for other transaction boxes, interview boxes, or extension numbers. Enter an existing System ID for each single digit the caller may press. As you record the greeting, include pauses in your recording so the caller has time to make a selection.

One-key dialing lets the caller press a single digit during or after the greeting; the system translates that single digit to the corresponding System ID, and routes the call accordingly.

Action After Greeting

Select the action, for Day and Night Mode, the system should take if the caller doesn’t press touchtones during the greeting.

If greeting is not recorded, the voice mail system takes this action immediately.

You may specify a different action to be taken during Day Mode than during Night Mode. The possible actions are described below.

✆ Take a message

Take a message from the caller. This is the most commonly used option.

✆ Transfer to operator

Transfer the caller to the operator.

✆ Say Good-bye

The system says *“If you need further assistance, press the pound key now. Thank you and good-bye”* and hangs up.

✆ Hang up

The system hangs up, without saying good-bye.

✆ Go to another ID

The system routes the caller to the System ID you enter.

✆ Restart the call

Except in special applications, the call returns to the opening greeting that answered the call.

If Take a Message is Used

If you want the transaction box to take a message, answer the rest of the questions on the worksheet.

✆ Maximum Message Length

Enter time (in seconds) a message from an outside caller can last.

✆ Allow caller to edit message?

Specify if callers can record again or add to their message.

✆ Mark the messages urgent?

Indicate the message priority of outside callers.

- Select **Yes** to automatically mark all messages from outside callers urgent.
- Select **No** to leave messages from outside callers unmarked.
- Select **Ask** if you want the system to ask outside callers if the message should be marked urgent.

Table 2-16 Sample Worksheet 16 – Transaction Boxes

Worksheet **16**	**Transaction Boxes**
Page 1 of 1	

Transaction boxes are the building blocks of special applications. They can be used to provide audiotext, one-key menus, special message taking, and special call routing. For each transaction box in your application, fill out a copy of this worksheet.

System ID 201	Name Network Support	Owner Jonathan Winter

Call Transfer

Transfer the calls reaching this box to an extension?
Day hours ■ Yes, to extension 125 ☐ No
Night hours ☐ Yes, to extension _____ ■ No

Call transfer type ■ Await Answer for 4 rings (3 rings or more) ☐ Release ☐ Wait for Ringback for ___ rings (3 rings or more)

Transfer options ■ **A**nnounce ☐ **C**onfirm ☐ **I**ntroduce ☐ **M**essage Screen ☐ **S**creen ☐ None
(Use only with Await Answer call transfer)

Use call holding? ☐ Yes ☐ Vox ■ No
(Do not use with Release call transfer)

Greeting

Day Greeting I'm sorry, all of our technicians are answering other calls. Please hold and I'll connect you to an operator.

Night Greeting You've reached our network support desk after hours. You may leave a message for our technicians. Be sure to include your telephone number. ____________________

Use one-key dialing during greeting? ☐ Yes ■ No

1= ________	2 = ________	3 = ________	4 = _________	5 = _________
6 = ________	7 = ________	8 = ________	9 = _________	0 = _________

Action After Greeting

Day	Night	(check one box for Day hours and one box for Night hours)
☐	☐	Say "Goodbye" then hang up
■	☐	Transfer the caller to the operator
☐	☐	Restart the call at the opening greeting
☐	☐	Route the call to another subscriber or transaction box (Use Go-to-ID →)
☐	☐	Interview the caller (Use Go-to-ID→ $PM)
☐	■	Take a message

If taking message:
Maximum Message Length 180 seconds Allow caller to edit message? ■ Yes ☐ No
Mark the messages urgent? ☐ Yes ☐ No ■ Ask
Action after message? Say Goodbye

Transaction Directory

SECTION 17

WORKSHEET 17: INTERVIEW BOXES

An interview box is a special transaction box that can ask up to 20 questions and record the caller responses in a single message.

Make a copy of this sheet for each interview box your application uses, including the Public Interview Box. Then, fill in the worksheet with the box name, owner, and System ID. Enter the text of each question you want the voice mail system to ask.

Box Name

Enter the name of the interview box. Give the box a name that describes the purpose, such as Sales Order Box.

Owner

Enter the name of the subscriber who owns the interview box. The owner receives the messages left in the interview box. The Public Interview Box is owned by the system.

System ID

Choose a System ID for the interview box. Ensure that this ID does not conflict with any other System IDs in the system.

Question

Enter the full text for each interview question. You are allowed up to 20 questions for the interview box. Statements are also allowed for questions. For example, at the end of all the questions, you might want to say *"Thank you for your order."*

Enter the time (in seconds) the caller has to answer. For questions that normally have short replies, such as (*"What is your telephone number?"*) a reply time of 6 to 10 seconds is usually enough. For each question or statement that does not require a reply, enter a zero reply time.

Should outside callers mark messages urgent?

Select how the system marks the priority of messages in the interview box.

- Select **Yes** to automatically mark **all** messages from outside callers urgent.
- Select **No** to leave messages from outside callers unmarked.
- Select **Ask** if you want the system to **ask** outside callers if the message is urgent.

Action after last question

Decide what action you want the voice mail system to take after asking the questions. The most common choices are Say Good-bye or Hang up. The possible actions are as follows:

- Say goodbye then hang up
  The system says *“If you need further assistance, press the pound key now. Thank you and good-bye,”* and hangs up.
- Transfer the call to the operator

  Transfer the caller to the operator.
- Restart the call

  Except in special applications, the caller is returned to the opening greeting that answered the call.
- Route the call to another subscriber or transaction box (Use Go-to-ID →)

  The system routes the caller to the entered System ID.

Table 2-17 Sample Worksheet 17 – Interview Boxes

Worksheet **17**	**Interview Boxes**
Page 1 of 2	

Interview boxes allow you to ask specific questions of callers. All the responses of a caller are joined together in a single message, that is sent to the owner of the interview box. For each interview box in your application, fill out a copy of this worksheet. Write in the questions to be asked the caller and the maximum time allowed for the caller answer.

Box Name Order Interview

Owner Troy Thompson

System ID **$404**

Question	**Max. Response (in seconds)**
1. What product would you like to order, and how many copies?	10
2. What is your telephone number?	10
3. How would you like this shipped?	15
4. Please tell me the complete shipping address.	30
5. To what purchase order number should this be billed?	10
6. Any additional instructions or requests?	40
7. Thank you. We will confirm your order in one day.	0

(Unused lines 8 through 20 omitted for example)

Should outside callers be allowed to mark messages urgent ☐ Yes ■ No ☐ Ask

Action after last question

■ Say goodbye then hang up

☐ Transfer the call to the operator

☐ Restart the call

☐ Route the call to another subscriber or transaction box (Use Go-to-ID →)

Transaction Directory

Fill in the Screens

CHAPTER 3

SECTION 1
BEFORE YOU FILL IN THE SCREENS

Now that you have filled in all of your worksheets, you can actually fill in the system screens with the configuration you have chosen. Before you begin to fill in screens, read through this section.

Use the Completed Worksheets

It's easy to use completed worksheets to configure the system; the worksheets correspond to the voice mail system screens. The screen name is printed in the lower right corner of the worksheet. For those screens with numbered lines, the line numbers on the worksheets correspond to the line numbers on each screen.

This section of the guide walks you through using each worksheet to fill in the system screens, step by step. Sign in to the system, find the screen you want, and answer the worksheet questions in the fields on the screen. Your application can be configured in no time.

If you have any questions as you configure the application, refer to this manual or to the EliteMail VMS/EliteMail Limited Technician Guide for details about system features.

Sign In to the System

Only a System Manager can access and change the system screens. To configure the voice mail system, sign in at the console using a System Manager Personal ID. If you don't know a System Manager Personal ID, check with the installer.

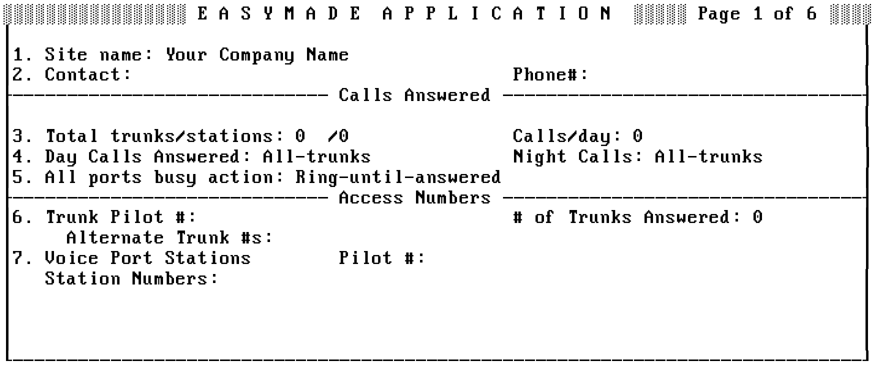
1. Press F2. The system prompts: **Please enter your ID**.
2. Enter a System Manager Personal ID, and press ↵Enter. If asked, enter the System Manager security code, and press ↵Enter. The system displays Application Screen Page 1.

Now you can enter your answers to the questions on the worksheet.

☞ If you get interrupted as you configure the application, the system may sign out and return to the Banner Screen. The system does this automatically to protect the system from unauthorized access. If this occurs, sign back in and continue from where you left off.

SECTION 2 PROGRAM WORKSHEET 1: SITE INFORMATION

You enter most of the site information on Application Screen Page 1. (Refer to Figure 3-1 Easymade Application Screen Page 1.)



```
░░░░░░░░░░░░░░░░ E A S Y M A D E   A P P L I C A T I O N  ░░░░░ Page 1 of 6 ░░░░
|1. Site name: Your Company Name                                               |
|2. Contact:                                   Phone#:                         |
|----------------------------- Calls Answered ---------------------------------|
|                                                                              |
|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:                                                           |
|                                                                              |
|                                                                              |
|                                                                              |
|______________________________________________________________________________|
```

Figure 3-1 Easymade Application Screen Page 1

Application Screen Page 1 gives an overview of how your system is configured. It keeps important telephone traffic and contact information in one place.

✆ 1. Site name

1. Move cursor to this field.
2. Enter the name of the site, and press ↵Enter.

✆ 2. Contact:

1. Move cursor to this field.
2. Enter the contact name, and press ↵Enter.

✆ Phone#:

1. Move cursor to this field.
2. Enter the contact work telephone number, and press ↵Enter.

Calls Answered

✆ 3. Total trunks / stations:

Enter the number of trunks, and press ↵Enter, followed by the number of stations, and press ↵Enter for the NEC telephone system.

✆ Calls/day:

Enter the average number of calls received on the site busiest days, and press ↵Enter.

✆ 4. Day Calls Answered:

Move cursor to this field, and enter one of the following:

Worksheet Choice	**Enter**
All Trunks	A, and press ↵Enter
Some Trunks	S, and press ↵Enter
No Trunks	F, and press ↵Enter

✆ Night calls:

Move cursor to this field, and enter one of the following:

Worksheet Choice	**Enter**
All Trunks	A, and press ↵Enter
Some Trunks	S, and press ↵Enter
No Trunks	F, and press ↵Enter

✆ 5. All ports busy action

Move cursor to this field, and enter one of the following:

Worksheet Choice	**Enter**
Ring until Answered	R, and press ↵Enter
Operator Forward	O, and press ↵Enter
Busy Tone	B, and press ↵Enter

Access Numbers

✆ 6. Trunk Pilot #:

Enter area code and telephone number outside callers use to reach the voice mail system, and press ↵Enter. If the voice mail system answers only internally forwarded calls, press ↵Enter to leave the field blank.

✆ # of trunks answered:

Enter number of trunks the voice mail system answers, and press ↵Enter.

✆ Alternate Trunk #s:

Enter another number for outside callers to use to reach voice mail, and press ↵Enter. You can enter additional numbers in three fields. Press ↵Enter after you enter each number to move the cursor to the next telephone number field.

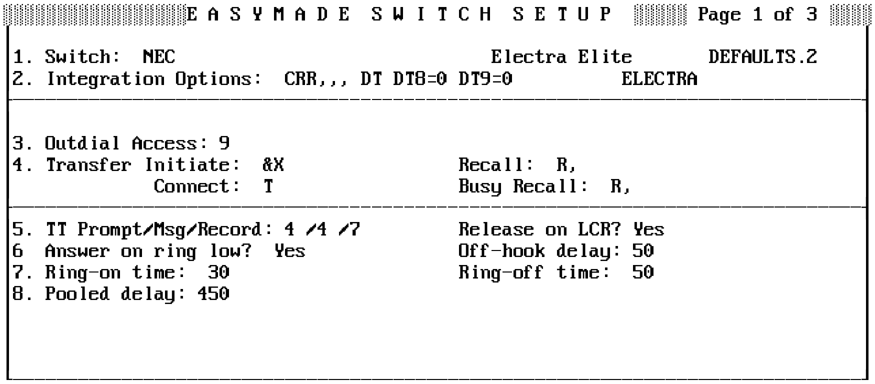
✆ 7. Voice Port Stations

- Pilot #:
  Enter the area code and telephone number, and press ↵Enter.
- Station Numbers
  Enter numbers in ascending order, separated by commas. If the station numbers are sequential, you may enter a range of numbers (*e.g.*, 101~104).

  Enter all the NEC telephone system station numbers connected to a voice mail system port, and press ↵Enter.

NEC Telephone System Information

The NEC Electra Elite is the only telephone system the EliteMail card supports.



```
E A S Y M A D E   S W I T C H   S E T U P        Page 1 of 3
1. Switch:  NEC                                Electra Elite      DEFAULTS.2
2. Integration Options:  CRR,,, DT DT8=0 DT9=0           ELECTRA
--------------------------------------------------------------------------------

3. Outdial Access: 9
4. Transfer Initiate:  &X                   Recall:  R,
             Connect:  T                    Busy Recall:  R,
--------------------------------------------------------------------------------
5. TT Prompt/Msg/Record: 4 /4 /7            Release on LCR? Yes
6  Answer on ring low?  Yes                 Off-hook delay: 50
7. Ring-on time:  30                        Ring-off time:  50
8. Pooled delay: 450
```

Figure 3-2 Easymade Switch Setup Screen Page 1

To reinitialize the switch parameters to the factory default settings, press Ctrl-S and Refer to Figure 3-2 Easymade Switch Setup Screen Page 1.

1. In the **Switch** field, enter **NEC**, and press ↵Enter.
   The system finds the name of first NEC Electra Elite telephone system in the Switch Setup library.

2. Enter Y, and press ↵Enter to select the telephone system or Enter N, and press ↵Enter to display the next match.

3. When the system asks: Is it the NEC Electra Elite? (Y/N), Enter Y, and press ↵Enter to verify.

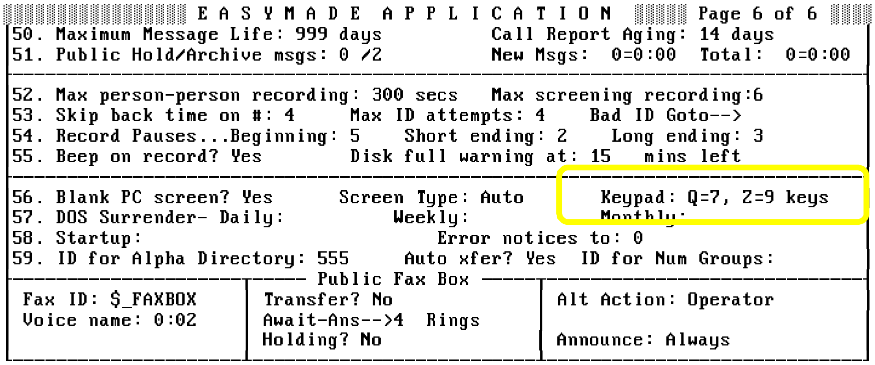
4. Then the system asks: Are you sure you want to initialize all switch parameters?

5. Enter Y, and press ↵Enter, and the fields on the screen (pages 1 ~ 3) are automatically filled with the factory default parameters best suited for your NEC Electra Elite telephone system.

☞ Some fields on Switch Setup Screen Page 2 are used to set how Live Record and Constant Message Count work at your site. For details, refer to the EliteMail VMS/EliteMail Limited Technician Guide.

Keypad Map

The keypad map used system-wide is displayed in the **Keypad** field on Application Screen Page 6. This is a display-only field. If you want to set the system for a keypad map other than the default, you must run a special utility. For details on changing the keypad map, refer to the EliteMail VMS/ EliteMail Limited Technician Guide.

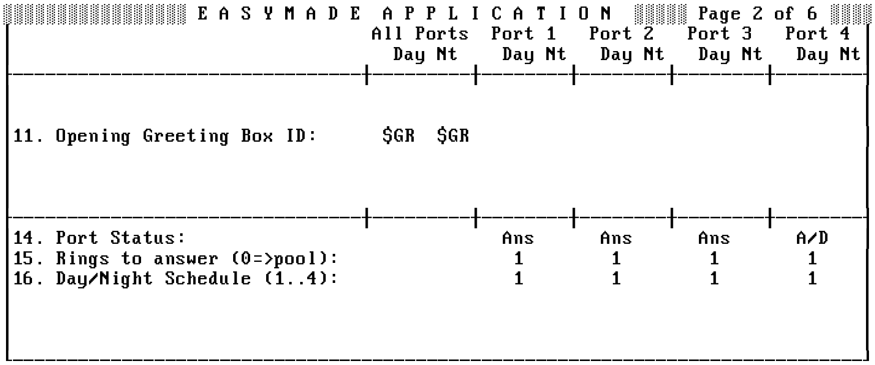


```
░░░░░░░░░░░░░░░░░░ E A S Y M A D E  A P P L I C A T I O N ░░░░░ Page 6 of 6 ░░░░
50. Maximum Message Life: 999 days          Call Report Aging: 14 days
51. Public Hold/Archive msgs: 0 /2          New Msgs:  0=0:00  Total:  0=0:00
--------------------------------------------------------------------------------
52. Max person-person recording: 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. DOS 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       |
                      | Holding? No                | Announce: Always
```

Figure 3-3   Keypad Map

SECTION 3 PROGRAM WORKSHEET 2: THE OPENING GREETING

Use this worksheet to help you as you record your opening greetings and set up how the system handles incoming calls. (Refer to Figure 3-4 Easymade Application Screen Page 2.)



```
░░░░░░░░░░░░░░░░░░ E A S Y M A D E  A P P L I C A T I O N ░░░░░ Page 2 of 6 ░░░░
                                  All Ports  Port 1   Port 2   Port 3   Port 4
                                   Day Nt    Day Nt   Day Nt   Day Nt   Day Nt
---------------------------------+---------+--------+--------+--------+--------


11. Opening Greeting Box ID:       $GR  $GR



---------------------------------+---------+--------+--------+--------+--------
14. Port Status:                              Ans      Ans      Ans      A/D
15. Rings to answer (0=>pool):                 1        1        1        1
16. Day/Night Schedule (1..4):                 1        1        1        1
```

Figure 3-4   Easymade Application Screen Page 2

If you are not viewing the Easymade Application Screen, press Ctrl-A, then press PageDown to view Page 2.

All Ports

11. Opening Greeting Box ID

Prompts were recorded for a default opening greeting, but you may record them again to personalize the voice mail system for your application. The default opening greeting is recorded in the $Greeting transaction directory. If you are not viewing this screen, press Ctrl-T, then press PageDown until you are actually viewing the $Greeting transaction directory

Recording prompts involves two main steps:

1. Establish a local connection with the voice mail system. Local connection is made using the F3 Select Port, and F4 Local on/off, command keys. This is a quick, 4-step process. You need a telephone within arm reach of the system console.
2. Press F9 or F10 to listen to or record the prompts.

Establish a local connection:

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. **RINGING** is followed shortly by **DAY ANSWER** (or **NIGHT ANSWER**) as your line rings, is answered, and the system plays the opening greeting.
3. The port selection indicator, **>>**, shows the port connecting locally. Press F3 to move **>>** to the port that answered your call.
4. Press F4 to connect locally. The port status indicator changes to **Local Connect**, and any message you hear playing stops.

☞ After you are connected locally, leave the telephone handset off-hook. If you hang up the telephone before you are finished with the local connection, you must disconnect and establish your connection again.

On the worksheet, if you chose:

Transfer Call to Operator

Enter the operator ID, usually 0, and press ↵ Enter.

Interview the caller

Enter **$PM**, and press ↵Enter. Callers are routed to the Public Interview Box.

Hang Up

Leave the field blank (no System ID). To delete an existing ID, position the cursor on the ID, press Delete several times until the field is empty, and press ↵Enter.

Other

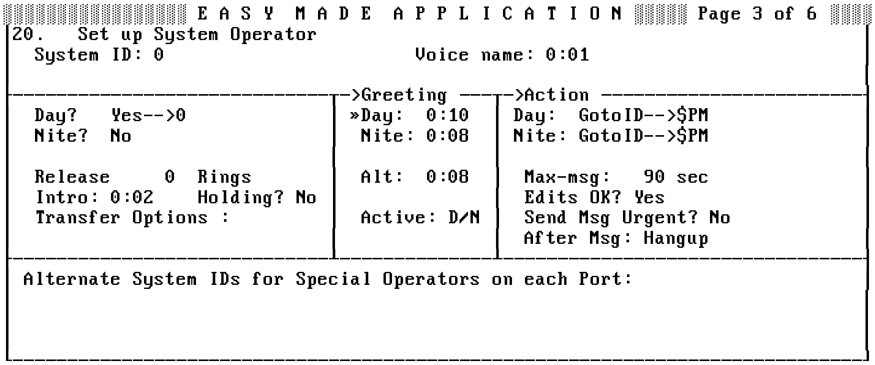
Enter the System ID of the transaction box, interview box, or other System ID where you want the voice mail system to route the caller, and press ↵Enter.

☞ A System ID may have up to 10 digits, but only three digits are displayed in this field. You can scroll left and right through the field. To guarantee that nothing is hidden to right of the entry, press Ctrl-K to delete to the end of the field.

SECTION 4 PROGRAM WORKSHEET 3: OPERATOR HANDLING

Application Screen

If you are not viewing the Easymade Application Screen, press Ctrl-A, then press PageDown until you display Page 3. Refer to Figure 3-5 Easymade Application Screen Page 3.



```
░░░░░░░░░░░░░░░░░ E A S Y  M A D E  A P P L I C A T I O N ░░░░░ Page 3 of 6 ░░░░
|20.   Set up System Operator                                                    |
|  System ID: 0                         Voice name: 0:01                         |
|                                                                                |
|------------------------------->Greeting ----->Action --------------------------|
|  Day?   Yes-->0                |»Day:  0:10  |Day:  GotoID-->$PM               |
|  Nite?  No                     | Nite: 0:08  |Nite: GotoID-->$PM               |
|                                |             |                                 |
|  Release     0  Rings          | Alt:  0:08  | Max-msg:   90 sec               |
|  Intro: 0:02    Holding? No    |             | Edits OK? Yes                   |
|  Transfer Options :            | Active: D/N | Send Msg Urgent? No             |
|                                |             | After Msg: Hangup               |
|--------------------------------------------------------------------------------|
| Alternate System IDs for Special Operators on each Port:                       |
|                                                                                |
|                                                                                |
|________________________________________________________________________________|
```

Figure 3-5 Easymade Application Screen Page 3

20. Set up System Operator

✆ System ID:

1. Select this field
2. Enter 0 and press ↵Enter.
   If your operator ID is different, enter it instead of 0.

✆ Day?

1. Move the cursor to this field.
2. Enter **N**, and press ↵Enter if an operator is not available.
3. Enter **Y**, and press ↵Enter if an operator is available during the hours your organization is open (Day Mode).
4. After the →, enter the operator actual extension number, and press ↵Enter.

✆ Nite?

1. Move the cursor to this field.
2. Enter **Y**, and ↵Enter if an operator is available during the hours your organization is not open (Night Mode).
3. Enter **N**, and press ↵Enter if an operator is not available.

✆ Transfer Type

The call transfer type field, directly below the Nite? field, is not labeled. It can be Release, Await-Ans, or Wait-ring**.** To change the setting, position the cursor on the existing field, and enter:

Worksheet Choice	Enter
Release	R, and press ↵Enter
Await Answer	A, and press ↵Enter
Wait for Ringback	W, and press ↵Enter

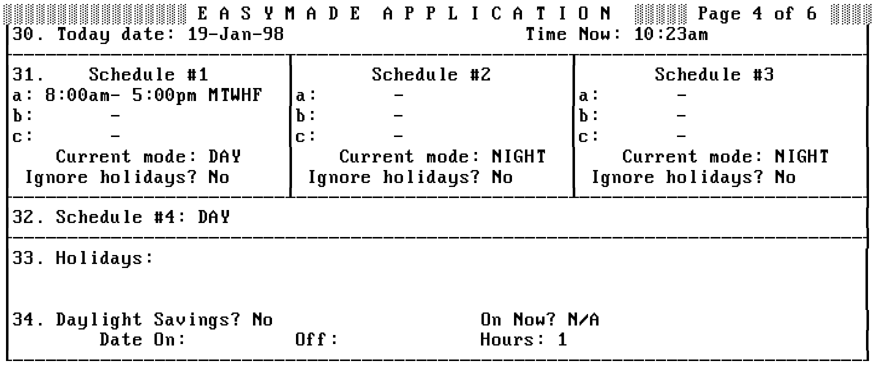
✆ Rings

Enter the number of Rings to Wait, and press ↵Enter**.**

☞ This parameter does not apply if you selected Release transfer.

Section 5 Program Worksheet 4: System Schedules

If you are not viewing the Easymade Application Screen, press Ctrl-A, then press PageDown until you display Page 4. Refer to Figure 3-6 Easymade Application Screen Page 4.



```
░░░░░░░░░░░░░░░░░ E A S Y M A D E   A P P L I C A T I O N  ░░░░░ Page 4 of 6 ░░░░
|30. Today date: 19-Jan-98                              Time Now: 10:23am          |
|----------------------------------------------------------------------------------|
|31.    Schedule #1        |       Schedule #2         |       Schedule #3         |
|a: 8:00am- 5:00pm MTWHF   |a:        -                |a:        -                |
|b:        -               |b:        -                |b:        -                |
|c:        -               |c:        -                |c:        -                |
|    Current mode: DAY     |    Current mode: NIGHT    |    Current mode: NIGHT    |
| Ignore holidays? No      | Ignore holidays? No       | Ignore holidays? No       |
|----------------------------------------------------------------------------------|
|32. Schedule #4: DAY                                                              |
|----------------------------------------------------------------------------------|
|33. Holidays:                                                                     |
|                                                                                  |
|                                                                                  |
|34. Daylight Savings? No                          On Now? N/A                     |
|        Date On:          Off:                    Hours: 1                        |
|__________________________________________________________________________________|
```

Figure 3-6 Easymade Application Screen Page 4

✆ 31. Schedule #1/Schedule #2/Schedule #3

1. Move the cursor to Schedule #1.
2. Enter the beginning time (in HH:MM format), and press ↵Enter.
3. Enter the ending time, and press ↵Enter.
4. Enter the letters for the days of the week this range applies to. The valid letters are:

M	Monday
T	Tuesday
W	Wednesday
H	Thursday
F	Friday
S	Saturday
U	Sunday

You can enter up to 3 ranges for each separate schedule (e.g., your organization could be open from 8:00 am to 12:00 pm, closed for lunch from 12:00 pm to 1:00 pm, and then reopen from 1:00 pm to 6:00 pm.) Enter the days of the week (MTWHFSU) for each schedule range entered.

✆ Ignore holidays?

1. If Schedule #1 follows normal hours on holidays, move the cursor to this field.
2. Enter **Y**, and press ↵Enter.

Schedule #2 and Schedule #3 are for advanced applications, as described in the EliteMail VMS/EliteMail Limited Technician Guide. Leave the fields for these schedules blank for now.

✆ 32. Schedule #4:

Enter **D** or **N** , and press ↵Enter to set Schedule #4 to Day Mode or Night Mode.

✆ 33. Holidays:

Enter the dates your organization is closed on the two rows below Line 33. Enter the day of the month, followed by **-** and the first three letters of the month, and press ↵Enter (*e.g.*, Enter **1-Jan**, and press ↵Enter). You may enter up to nine holidays on each row. The date is considered a holiday in any year.

✆ 34. Daylight Savings?

1. Enter **Y** or **N**, and press ↵Enter to set this field to Yes or No.
2. If you entered **Y**, enter the date the system turns on Daylight Savings Time in the Date On: field.
3. Enter the day that the system turns off Daylight Savings In the Off: field.
   Use the same format (day-month) as you did for your holidays (*e.g.*, 31-Dec).

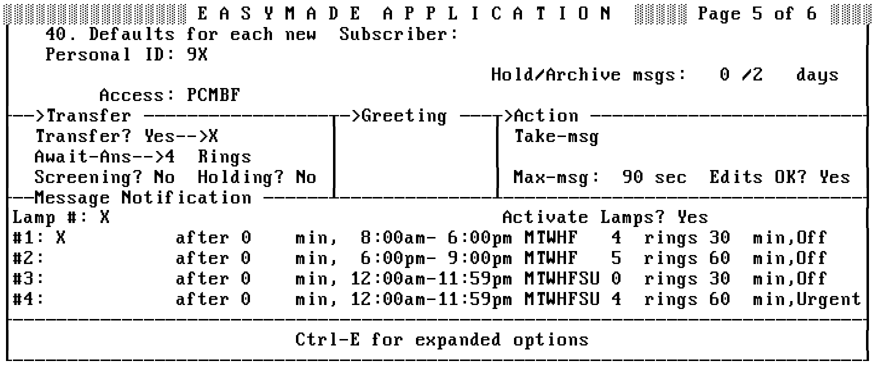
SECTION 6 PROGRAM WORKSHEET 5: DEFAULT SUBSCRIBER SETUP

If you are not viewing the Easymade Application Screen, press Ctrl-A, then press PageDown until you display Page 5.

The parameters on this screen are applied to new subscribers as they are added to the system. Later, you can change these parameters for individual subscribers on Personal Directory Screens.

☞ Changing parameters on Application Screen Page 5, does **not** change parameters for subscribers already enrolled in the system.

(Refer to Figure 3-7 Easymade Application Screen Page 5.)



```
░░░░░░░░░░░░░░░░░ EASYMADE APPLICATION ░░░░░ Page 5 of 6 ░░░░
   40. Defaults for each new  Subscriber:
   Personal ID: 9X
                                                  Hold/Archive msgs:   0 /2   days
        Access: PCMBF
--->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
-------------------------------------------------------------------------------
```

Figure 3-7 Easymade Application Screen Page 5

✆ 40. Defaults for each new subscriber

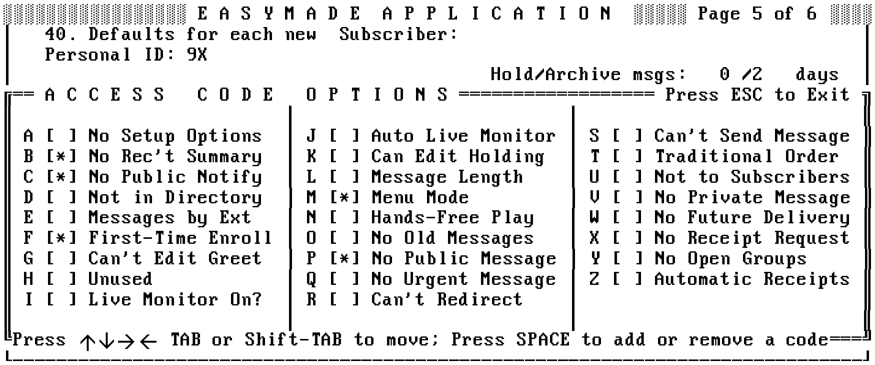
- Personal ID

  To use a different numbering convention for Personal IDs, enter a different prefix in this field, and press ↵Enter.

- Access

  1. To turn on or off specific features for subscribers, highlight this field.
  2. To add codes, enter the access codes, and press ↵Enter.
  3. To remove codes, press Del.

You can also use a special pop-up window to add or remove access codes. Refer to Figure 3-8 Access Code Options Window. On the pop-up window, an active code has ***** in its checkbox.



```
░░░░░░░░░░░░░░░░ E A S Y M A D E   A P P L I C A T I O N  ░░░░░ Page 5 of 6 ░░░
    40. Defaults for each new  Subscriber:
    Personal ID: 9X
                                          Hold/Archive msgs:   0 /2   days
== A C C E S S   C O D E   O P T I O N S ================== Press ESC to Exit

  A [ ] No Setup Options  | J [ ] Auto Live Monitor | S [ ] Can't Send Message
  B [*] No Rec't Summary  | K [ ] Can Edit Holding  | T [ ] Traditional Order
  C [*] No Public Notify  | L [ ] Message Length    | U [ ] Not to Subscribers
  D [ ] Not in Directory  | M [*] Menu Mode         | V [ ] No Private Message
  E [ ] Messages by Ext   | N [ ] Hands-Free Play   | W [ ] No Future Delivery
  F [*] First-Time Enroll | O [ ] No Old Messages   | X [ ] No Receipt Request
  G [ ] Can't Edit Greet  | P [*] No Public Message | Y [ ] No Open Groups
  H [ ] Unused            | Q [ ] No Urgent Message | Z [ ] Automatic Receipts
  I [ ] Live Monitor On?  | R [ ] Can't Redirect    |

Press ↑↓→← TAB or Shift-TAB to move; Press SPACE to add or remove a code===
```

Figure 3-8 Access Code Options Window

Add or remove codes at the Access Code Options window:

1. Press Ctrl-E.

2. Press ↵Enter.

3. Press Tab, Shift-Tab, ↓, ↑, ←, or → key to highlight the checkbox for the code you want.

4. Press SpaceBar to add or remove a code.

5. Press Esc to close the window.

✆ Transfer?

1. If Yes, highlight this field, enter **Y**, and press ↵Enter.

2. After **→**, enter **X**, and press ↵Enter.
   X indicates the voice mail system transfers calls to the subscriber extension. Extension # IDs are assigned to individual subscribers as you add them to the system.

3. If No, enter **N**, press ↵Enter, and skip this section.

✆ Call transfer type

This field, located directly below the Transfer? field, is not labeled. It can be Release, Await-Ans, or Wait-ring. To change the setting, position the cursor over the existing setting, and enter:

Worksheet Choice	**Enter**
Release	R, and press ↵Enter
Await Answer	A, and press ↵Enter
Wait for Ringback	W, and press ↵Enter

✆ → Rings

Enter the number of times the extension should ring before the caller is transferred to the subscriber voice, and press ↵Enter.

☞ This parameter does not apply if you selected Release call transfer.

✆ Screening?

Press Ctrl-E, then press ↓, and press ↵Enter to expand the screen.

1. If you want to use call screening in the **Screening Options** field, enter **SC** for Screen-Confirm, and press ↵Enter.

2. Move the cursor to the **Screening?** field, enter **Y**, and press ↵Enter.

☞ You can turn on call screening only with Await Answer call transfer.

3. If you do not want to use call screening, set the **Screening?** field to **No**.

4. Move the cursor to the **Transfer Options** field.

5. Enter **A** for Announce, and press ↵Enter.
   Subscribers hears a beep before the voice mail system connects an outside caller.

6. If you are using Release call transfer, leave the **Screening Options** and **Transfer Options** fields blank.

✆ Holding?

1. Set up call holding in the **Holding?** field, enter:

Worksheet Choice	**Enter**
Yes	Y, and press ↵Enter
Vox	V, and press ↵Enter
No	N, and press ↵Enter

☞ You cannot use call holding with Release call transfer.

2. Press Esc to close the expanded window.

Message Notification

✆ Lamp #

If you are using message waiting lamps, in the **Lamp #** field, enter the telephone number the system should dial to turn a message waiting lamp on or off for the subscriber, and press ↵Enter. Enter **X** to indicate the subscriber extension number.

✆ Activate Lamps ?

1. Enter **Y** for Yes or **N** for No, and press ↵Enter to indicate if the voice mail system should activate message waiting lamps for every subscriber.

2. If you select **Y**, also check the Message Lamp On and Off codes at the top of Switch Setup Screen Page 2 to ensure that they are the correct codes for your NEC telephone system. These codes were configured automatically when you entered the name of the NEC telephone system. (Refer to Program Worksheet 1: Site Information.)

Message Notification

✆ Should the system call the subscriber to deliver messages?

1. If you answered Yes on the worksheet, move the cursor to the **#1** field.
2. Enter **X**, and press [↵Enter] if you want the system to call a subscriber extension number.

✆ after_____ min

Enter the time in minutes you want the voice mail system to wait after a new message arrives, and press [↵Enter].

☞ This applies only to Batch message delivery.

✆ Delivery Schedule

The fields where you enter a delivery number and schedule for the subscriber extension are not marked.

1. After you enter **X** for the subscriber extension number, the cursor automatically moves to the next field.
2. Enter the time the voice mail system should start delivering messages, and press [↵Enter].
3. Enter the time the voice mail system should stop delivering messages, and press [↵Enter].
4. Enter the days of the week the voice mail system should follow this delivery schedule, and press [↵Enter]. Use these letters:

M	Monday
T	Tuesday
W	Wednesday
H	Thursday
F	Friday
S	Saturday
U	Sunday

5. Enter the number of times the voice mail system should ring the extension before hanging up, and press Enter.

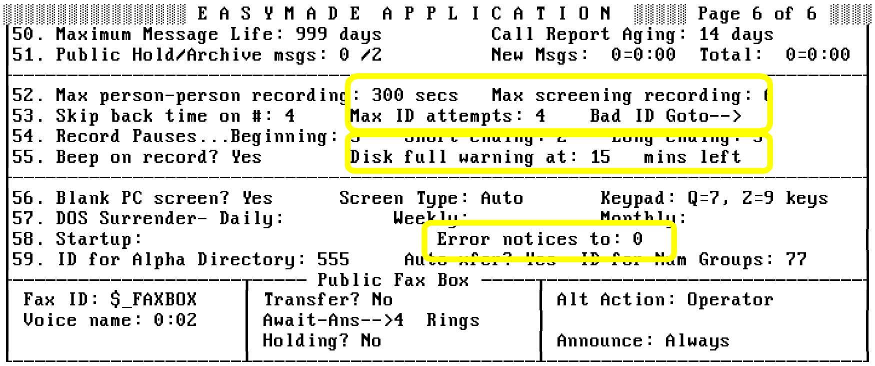
6. Enter the time delay in minutes between tries, and press Enter.

7. On the far right of the #1 Line, enter a code to select a delivery method, and press Enter. Use these letters:

B	Batch
E	Each
U	Urgent
O	Off

SECTION 7 PROGRAM WORKSHEET 6: SYSTEM SECURITY

Use the information from Worksheet 6 for Easymade Application Screen Page 6.



```
░░░░░░░░░░░░░░░░░ E A S Y M A D E  A P P L I C A T I O N ░░░░░ 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. Max person-person recording: 300 secs   Max screening recording:
53. Skip back time on #: 4      Max ID attempts: 4    Bad ID Goto-->
54. Record Pauses...Beginning:
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. DOS Surrender- Daily:          Weekly:            Monthly:
58. Startup:                          Error notices to: 0
59. ID for Alpha Directory: 555     Auto xfer? Yes   ID for Num Groups: 77
--------------------------- Public Fax Box ------------------------------------
 Fax ID: $_FAXBOX     | Transfer? No             | Alt Action: Operator
 Voice name: 0:02     | Await-Ans-->4  Rings     |
                      | Holding? No              | Announce: Always
```

Figure 3-9 Easymade Application Screen Page 6

If you are not viewing the Easymade Application Screen, press Ctrl-A, then press PageDown until you display Page 6.

✆ Max ID attempts:

Use this field to set the number of times a caller can misdial.

1. To use a value other than the default of 4, highlight this field.
2. Enter the new value, and press ↵Enter.
3. If a caller should be routed to another System ID for help after misdialing, highlight the Bad ID Goto→ field. Enter the new value, and press ↵Enter.

✆ Disk full warning at ___ mins left

Use this field to set the number of minutes of available message storage space remaining before the system asks subscribers to delete unnecessary messages.

1. To change this setting, highlight this field.
2. Enter the new value, and press ↵Enter.

✆ Error notices to:

Use this field to set who should receive a voice message if certain system errors occur. The system is set by default to the System ID for the Operator Box (System ID **0**), that sends the messages to everyone with public message access. If the System ID for the Operator Box is different on your system, replace **0** with the correct ID.

1. To send the messages to a subscriber, replace the Operator Box System ID with a subscriber Personal ID.
2. To send the messages to more than one subscriber, separate the subscriber Personal IDs with commas (*e.g.*, **8123,8456,8678**).
   You can also send the message to everyone with public message access and to one or more subscribers (*e.g.*, **0,8123,8456,8789**).

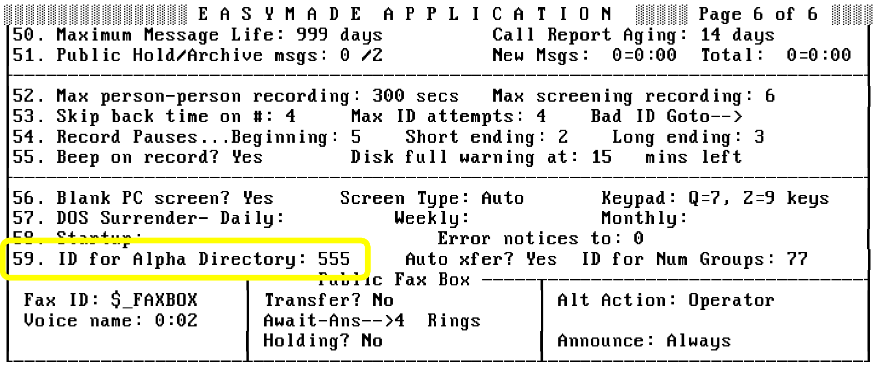
☞ If you use the Operator Box System ID to send error notices to everyone with public message access, remove the **P** access code for at least one subscriber. For details, refer to Worksheet 12 .

SECTION 8 PROGRAM WORKSHEET 7: DIRECTORY ASSISTANCE

Use the information you gathered to set up automatic directory assistance.

Automatic Directory Assistance

To turn on automatic directory assistance requires no special configuration. The default system comes with the automatic directory already set to the System ID 555 in the ID for Alpha Directory field. (Refer to Figure 3-10 Easymade Application Screen Page 6)



```
░░░░░░░░░░░░░░░░░░ E A S Y M A D E   A P P L I C A T I O N  ░░░░░ 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. Max person-person recording: 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. DOS Surrender- Daily:          Weekly:            Monthly:
58. Startup:                           Error notices to: 0
59. ID for Alpha Directory: 555     Auto xfer? Yes  ID for Num Groups: 77
                          Public Fax Box ----------------------------------------
 Fax ID: $_FAXBOX      | Transfer? No               | Alt Action: Operator
 Voice name: 0:02      | Await-Ans-->4  Rings       |
                       | Holding? No                | Announce: Always
_______________________|____________________________|__________________________
```

Figure 3-10 Easymade Application Screen Page 6

If you are not viewing the Application Screen, press Ctrl-A, then press PageDown until you display Page 6.

☞ In the opening greeting, mention the System ID that outside callers use to reach automatic directory assistance.

✆ Change 59. ID for Alpha Directory

1. Move the cursor to this field.
2. Enter the new System ID, and press ↵Enter.

✆ Turn off the automatic directory:

1. Move the cursor to this field.
2. Press Delete repeatedly until the field is empty, and press ↵Enter.

✆ Auto xfer?

1. Highlight the field.
2. Enter **Y**, and press ↵Enter to set the field to **Yes**.
3. Enter **N**, and press ↵Enter to set the field to **No**.

Numeric Directory Assistance

Setting up numeric directory assistance requires special configuration at the system console. To set up numeric directory assistance, add directory menus and directory groups at the Groups Screen, then manually add subscribers to directory groups. Numeric directory assistance requires ongoing maintenance as new subscribers or groupings are added or deleted from the system. Subscribers cannot change their listing in the numeric directory by telephone.

For details on setting up numeric directory assistance, refer to the EliteMail VMS/EliteMail Limited Technician Guide.

Department Transaction Box

The system is shipped with a department directory using a transaction box with the System ID 411. If you decided to use this directory on your system, you may want to record the greeting again or change the System ID.

If you decide not to use this department directory, you should delete the Departments, Sales, and Technical Support transaction boxes.

✆ Record greetings again for the Department, Sales, or Technical Support Box:

1. Establish a local connection with the voice mail system. For details, refer to Section 3 Program Worksheet 2: The Opening Greeting on page 3-6.

2. Press Ctrl-T to access the Transaction Directory.

3. Press PageUp or PageDown (or use the Jump command) to display the transaction box you want to change (**Departments**, **Sales**, or **Technical Support Box**).

4. Highlight the **Greeting Day** field.

5. Press F9. Press SpaceBar to start recording the new greeting. Press any key to stop recording.

6. Listen to the greeting to make sure it sounds the way you want. Press F10 to hear it.

7. Repeat steps 5 and 6 until you are satisfied with the recording.

✆ Change the System ID callers dial to reach the department directory:

1. Press Ctrl-T to access the Transaction Directory.

2. Press PageUp or PageDown (or use the Jump command) to display the **Departments Box**.

3. Move the cursor to the **System ID** field.

4. Enter the new System ID, and press ↵Enter.

✆ Delete the transaction boxes:

1. Press Ctrl-T to access the Transaction Directory.

2. Press PageUp or PageDown (or use the Jump command) to display the transaction box you want to delete (**Departments**, **Sales**, or **Technical Support Box**).

3. Press F7.

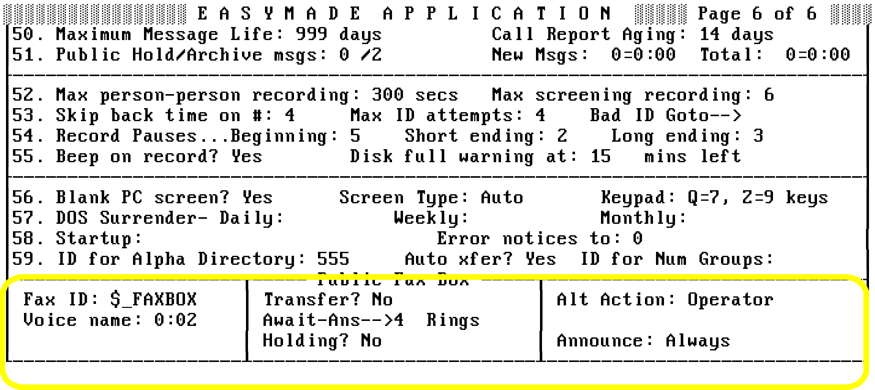
4. Press ↵Enter to select **Box**.

5. Press Y to delete the transaction box.

6. Repeat steps 1 ~ 5 for each box in the department directory.

SECTION 9 PROGRAM WORKSHEET 8: PUBLIC FAX BOX

To set up the fax detect feature, refer to Figure 3-11 Public Fax Box to fill in the Public Fax Box fields. If you are not viewing this screen, press Ctrl-A. Press PageUp or PageDown until Page 6 is displayed.



```
░░░░░░░░░░░░░░░░░░░ E A S Y M A D E   A P P L I C A T I O N  ░░░░░ 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. Max person-person recording: 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. DOS 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     |
                       | Holding? No              | Announce: Always
-------------------------------------------------------------------------------
```

Figure 3-11 Public Fax Box

Public Fax Box

✆ Fax ID:

1. Move the cursor to this field.
2. Enter the System ID of the Public Fax Box, and press ↵Enter. The default System ID is $_FAXBOX.

✆ Voice Name:

To change the voice name, establish a local connection and record the Public Fax Box name again. The default recorded name is The Public Fax Box. For local connection, refer to Program Worksheet 2.

1. After a local connection is established, highlight this field.
2. To record, press F9, then press SpaceBar. Say the name, and press any key to stop recording.
3. Press F10 to listen to the name to make sure it sounds the way you want.
4. Repeat steps 2 and 3 until you are satisfied with the recording.

✆ Transfer?

1. Move cursor to this field.
2. Enter **Y**, and press ↵Enter.
3. Enter the fax machine extension number on the NEC telephone system, and press ↵Enter.
   If using more than one fax machine, set up a hunt group on your telephone system for the fax machine extensions, and enter the pilot extension number here.

✆ Call transfer type

The transfer type field, located directly below the **Transfer?** field, is not labeled. You can select Release, Await-Ans, or Wait-ring. To change the setting, position the cursor over the existing setting, and enter:

Worksheet Choice	**Enter**
Release	R, and press ↵Enter
Await Answer	A, and press ↵Enter
Wait for Ringback	W, and press ↵Enter

✆ → ____ Rings

Enter the number of times the fax extension should ring before the system takes the alternate action, and press ↵Enter.

☞ This parameter does not apply if you selected **Release** call transfer.

✆ Holding?

In this field, enter:

Worksheet Choice	Enter
Yes	Y, and press ↵Enter
Vox	V, and press ↵Enter
No	N, and press ↵Enter

✆ Alt Action:

Set how the system reacts if the transfer to the fax extension is unsuccessful. The most common choice is Transfer to operator. Depending on which alternate action was checked on the worksheet, enter the applicable choice in this field.

Worksheet Choice	Enter
Say Good-bye and Hang up	S, and press ↵Enter
Transfer Caller to Operator	O, and press ↵Enter
Restart Call	R, and press ↵Enter
Try another System ID	G, and press ↵Enter (Specify ID)
Hang up	H, and press ↵Enter

✆ Announce:

Set if the system should send a public notice when it transfers a call to the fax machine, and if it asks the person sending a manual fax to record a message describing the fax and who it is for. Depending on the choice circle on the worksheet, enter one of the following:

Worksheet Choice	**Enter**
Always	A, and press ↵Enter
Voice	V, and press ↵Enter
Post	P, and press ↵Enter
Never	N, and press ↵Enter

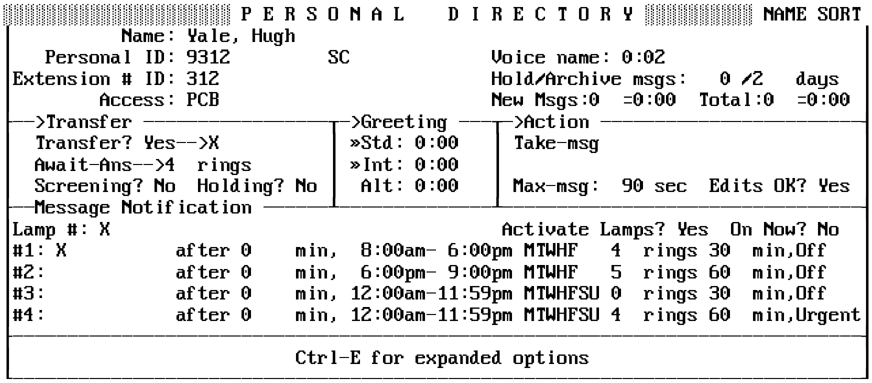
✆ Startup:

To use the Public Fax Box, you must add the **CNG** startup parameter to this field on Line 58 of Application Screen Page 6. This parameter sets the voice mail system to recognize incoming fax tone.

1. Highlight the field.
2. If necessary, press → repeatedly to move the cursor to the end of any startup options already entered in the field.
3. Enter **CNG**, and press ↵Enter.

SECTION 10 PROGRAM WORKSHEET 9: SUBSCRIBER LIST

Use to add new subscribers to the system on the Personal Directory Screen. Refer to Figure 3-12 Personal Directory Screen (Subscriber).



```
░░░░░░░░░░░░░░░░░░░░ P E R S O N A L   D I R E C T O R Y ░░░░░░░░░░ NAME SORT
           Name: Yale, Hugh
   Personal ID: 9312        SC            Voice name: 0:02
Extension # ID: 312                       Hold/Archive msgs:   0 /2   days
        Access: PCB                       New Msgs:0   =0:00  Total:0  =0:00
-->Transfer ---------------------->Greeting ----->Action ---------------------
  Transfer? Yes-->X              »Std: 0:00     Take-msg
  Await-Ans-->4  rings           »Int: 0:00
  Screening? No  Holding? No      Alt: 0:00     Max-msg:  90 sec  Edits OK? Yes
--Message Notification -------------------------------------------------------
Lamp #: X                                      Activate Lamps? Yes  On Now? No
#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
------------------------------------------------------------------------------
```

Figure 3-12 Personal Directory Screen (Subscriber)

Before you add subscribers, set up the default settings for each subscriber on Application Screen Page 5. Any subscribers you add to the system are set up with the default features automatically; that saves time. For details, refer to Worksheet 5.

After you set subscriber defaults, press Ctrl-D to display the Personal Directory Screen. To view each subscriber, press PageUp or PageDown. Press Home to display the first subscriber (alphabetically), and press End to display the last subscriber. The Personal Directory Screen keeps a page of settings for each subscriber.

☞ Changing parameters on Application Screen Page 5, does **not** change those parameters for subscribers already enrolled in the system.

The Add Menu

You can add subscribers one by one or by range of Extension # IDs.

Refer to Figure 3-13 Subscriber Added by Range. If the subscribers use consecutive Extension # IDs, adding by range can save time.

✆ Add subscribers by range:

1. Press F8 to Add.
2. Press ↓ ↓ to select **Range**, and press ↵Enter.

   Enter Range of Extension # IDs

   Start: **Stop:**

3. Enter the starting number of the range, and press Tab.
4. Enter the ending number of the range, and press ↵Enter.

If desired, enter any numbers or letters as a prefix to the Extension # IDs you are adding.

   Constant prefix:

5. Press Tab.
6. Enter any numbers or letters as a suffix to the Extension # IDs you are adding, and press ↵Enter.
   Constant suffix:

   The system displays the selected range and asks to confirm.

7. To accept the range, press Y.
8. Otherwise, press N.
9. Follow these steps again to add new range of Extension # IDs.

   After you confirm the range, the system displays a series of status messages as it adds the Extension # IDs.

10. If an ID in the range conflicts with a System ID already in your system, that particular ID is **not** added. Refer to this message:

    ID ... conflicts with existing

    <ID and name of mailbox> and was not added.

    Please make a note of this

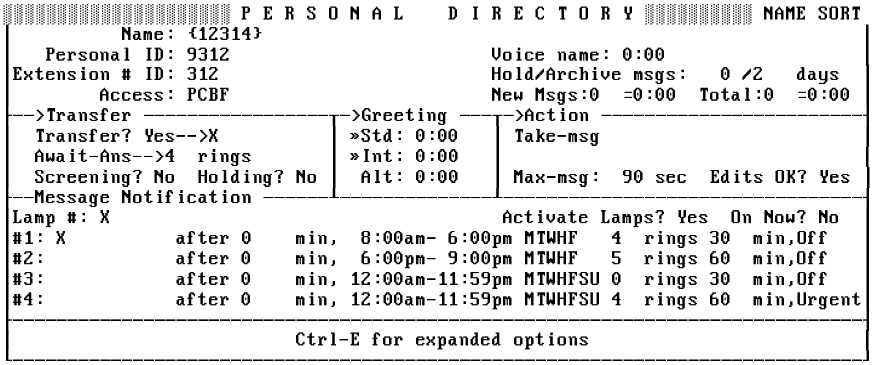
    Do you want to continue with the

    next Extension # ID (Y/N)?

11. To continue adding the remaining Extension # IDs in the range, press Y.

12. To stop the process altogether, press N. Repeat these steps to add different ranges of Extension # IDs without conflicting IDs.

13. When the system finishes adding the range of Extension # IDs, look through the Personal Directory to find the pages the system added. Each new subscriber has a spelled name with the Extension # ID in curly brackets { }. For each subscriber added by range, you can enter each subscriber name in the **Name** field, if you want.



```
░░░░░░░░░░░░░░░░░░░░░ P E R S O N A L   D I R E C T O R Y ░░░░░░░░░░ NAME SORT
|          Name: {12314}                                                       |
|   Personal ID: 9312                           Voice name: 0:00                |
|Extension # ID: 312                            Hold/Archive msgs:   0 /2   days|
|        Access: PCBF                           New Msgs:0  =0:00  Total:0  =0:00
|--->Transfer ------------------->Greeting ----->Action ------------------------|
|  Transfer? Yes-->X            | »Std: 0:00   | Take-msg                       |
|  Await-Ans-->4  rings         | »Int: 0:00   |                                |
|  Screening? No  Holding? No   |  Alt: 0:00   | Max-msg:  90 sec  Edits OK? Yes|
|--Message Notification ------------------------------------------------------ |
|Lamp #: X                                      Activate Lamps? Yes  On Now? No |
|#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                          |
|_______________________________________________________________________________|
```

Figure 3-13 Subscriber Added by Range

✆ Add subscribers individually:

1. Press F8 to display the Add Menu.

2. Press S to select **Subscriber**.

3. Enter the Extension # ID, and press ↵Enter.

4. Enter the last name, and press ↵Enter.

5. Enter the first name, and press ↵Enter.

6. Press ↵Enter to accept the default Personal ID for this subscriber, or enter a different ID, and press ↵Enter.

   To make it easy to add several subscribers at once, the system automatically prompts you for the next Extension # ID.

7. Continue adding the rest of the subscribers on your list by repeating steps 3~6 for each one.

8. Press Esc to return to the Personal Directory Page.

   For a subscriber that should not be listed in the automatic directory, add **D** to that subscriber Access field. Remember that subscribers can also change their automatic directory listing anytime from any touchtone telephone.

Record Names

For sites that are not using the subscriber enrollment conversation (**F** in subscriber Access field), you should record a name for each subscriber you just added. The subscriber can record the voice name later.

The system plays a subscriber name to identify the source or destination of a message. To reduce confusion, each subscriber needs a recorded name.

Making a recording at the system console involves establishing a local connection with the voice mail system, then recording the names using a telephone handset.

1. Establish a local connection. For details, refer to Program Worksheet 2: The Opening Greeting.

2. Press PageUp or PageDown (or use the Jump command) to display the subscriber Personal Directory Page. Highlight the **Voice name** field.

3. Press F9. Press SpaceBar to start recording. Say the subscriber first and last name. Press any key to stop recording.

4. Listen to the name to make sure it sounds the way you want. Press F10 to hear the name.

5. Repeat steps 3 and 4 until you are satisfied with the recording.

6. Repeat steps 2 through 5 for each new subscriber.

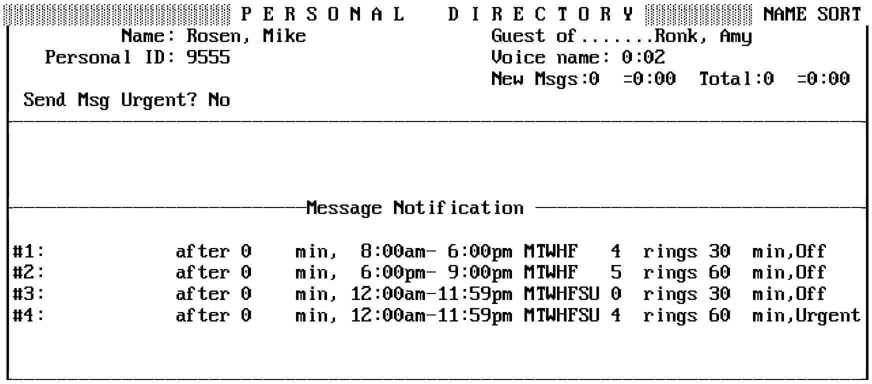
7. After you finish recording names, press F4 again to disconnect locally.

☞ Don’t forget to disconnect. A port is tied up until the local connection is disconnected.

For details on making recordings, refer to the EliteMail VMS/ EliteMail Limited Technician Guide.

SECTION 11 PROGRAM WORKSHEET 10: GUESTS

Use the information to add guests on the Personal Directory Screen. Refer to Figure 3-14 Personal Directory Screen (Guest).



```
░░░░░░░░░░░░░░░░░░░░ P E R S O N A L   D I R E C T O R Y ░░░░░░░░░░ NAME SORT
          Name: Rosen, Mike                     Guest of.......Ronk, Amy
   Personal ID: 9555                            Voice name: 0:02
                                                New Msgs:0  =0:00  Total:0  =0:00
 Send Msg Urgent? No
──────────────────────────────────────────────────────────────────────────────


───────────────────────────Message Notification ──────────────────────────────

#1:            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
```

Figure 3-14 Personal Directory Screen (Guest)

If you’re not viewing the Personal Directory Screen, press Ctrl-D.

Add Guests

Follow these steps for each guest.

1. Press PageUp or PageDown to display the page belonging to the host subscriber.
2. Press F8 to display the Add Menu.
3. Press G to select **Guest**, and press ↵Enter.
4. Press ↵Enter to confirm the name of the host subscriber.
5. Enter the guest Personal ID, and press ↵Enter.

6. Enter the last name, and press ↵Enter.

7. Enter the first name, and press ↵Enter.

8. Record a name for the guest. For details, refer to Worksheet 8.

✆ Send Msg Urgent?

1. If the guest can send the host subscriber urgent messages, move the cursor to this field.

2. Enter **Y**, and press ↵Enter to mark all messages from the guest Urgent

3. Enter **A**, and press ↵Enter to ask the guest each time if the message is urgent.

Message Notification

Even though guests do not use an internal extension, you can set the system to call a guest at up to 4 outside telephone numbers.

1. Highlight the #1 field.

2. Enter the number the voice mail system should call to deliver messages, and press ↵Enter.

3. In the **after** field, enter the number of minutes you want the voice mail system to wait after a new message arrives, and press ↵Enter.

☞ This applies only to batch message delivery.

4. Enter the time the voice mail system should start delivering messages, and press ↵Enter.

5. Enter the time the voice mail system should stop delivering messages, and press ↵Enter.

6. Enter the days of the week the voice mail system should follow this delivery schedule, and press ↵Enter. Use these letters:

M	Monday
T	Tuesday
W	Wednesday
H	Thursday
F	Friday
S	Saturday
U	Sunday

7. Enter the number of times the voice mail system should ring the extension before hanging up, and press ↵Enter.

8. Enter the time between tries, and press ↵Enter.

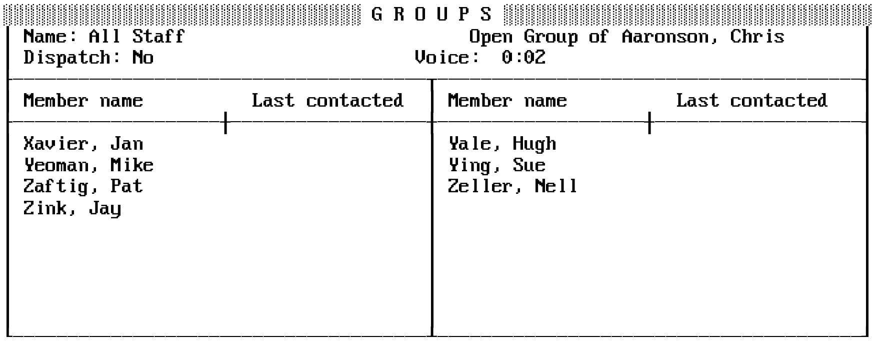
9. On the far right of the **#1** Line, enter a code to select a delivery method, and press ↵Enter. Use these letters:

B	Batch
E	Each
U	Urgent
O	Off

10. Repeat this process to add more delivery numbers and schedules for the guest, if desired.

SECTION 12 PROGRAM WORKSHEET 11: MESSAGE GROUPS

Use this information to add message groups. Refer to Figure 3-15 Groups Screen. To view the Groups Screen, press Ctrl-G.

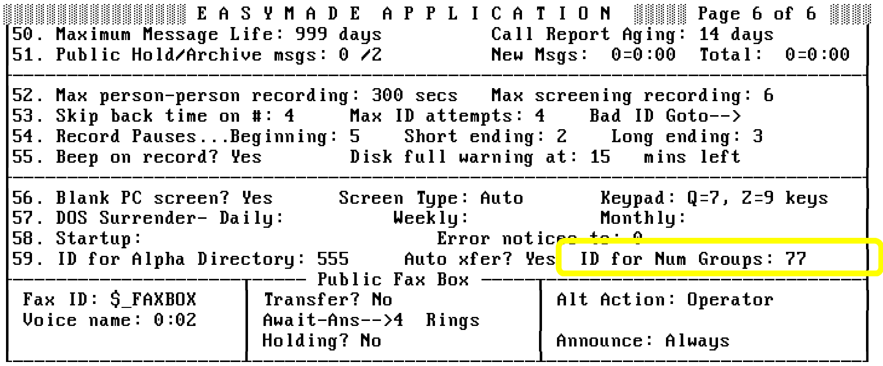


```
                               G R O U P S
 Name: All Staff                                Open Group of Aaronson, Chris
 Dispatch: No                               Voice:  0:02
 Member name          Last contacted      Member name          Last contacted
 Xavier, Jan                              Yale, Hugh
 Yeoman, Mike                             Ying, Sue
 Zaftig, Pat                              Zeller, Nell
 Zink, Jay
```

Figure 3-15 Groups Screen

✆ ID for Num Groups

If you are using numbered message groups, you must set a special System ID for leaving numbered group messages. Refer to Figure 3-16 ID for Num Groups Field. Set this System ID in the field.



```
░░░░░░░░░░░░░░░░░░░ E A S Y M A D E  A P P L I C A T I O N ░░░░░ 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. Max person-person recording: 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. DOS Surrender- Daily:          Weekly:            Monthly:
58. Startup:                            Error notices to: 0
59. ID for Alpha Directory: 555     Auto xfer? Yes  ID for Num Groups: 77
-------------------------- Public Fax Box ---------------------------------------
 Fax ID: $_FAXBOX      | Transfer? No               | Alt Action: Operator
 Voice name: 0:02      | Await-Ans-->4  Rings       |
                       | Holding? No                | Announce: Always
```

Figure 3-16   ID for Num Groups Field

1. Press Ctrl-A to view the Easymade Application Screen. Press PageUp or PageDown until you refer to Page 6.
2. Press ↓ repeatedly until you highlight the **ID for Num Groups** field.
3. Enter the System ID, and press ↵Enter.

Adding Message Groups at the Console

Subscribers can add message groups from any touchtone telephone. The System Manager can also add message groups at the system console. Program Worksheet 11: Message Groups is used for message groups added at the console.

Adding a new message group from the console involves two procedures:

✆ Add a new message group:

1. If necessary, press Ctrl-G to display the **Groups** Screen.
2. Press F8 to add a new group.
3. To add a private message group, press P. To add an open message group, press O.
4. To assign the System Manager as the group owner, press ↵Enter.

5. To assign another subscriber as the group owner, press N. Enter the first few letters of the owner last name, and press ↵Enter.
   The system shows the first matching name.
6. Press Y to select the name, or N to view the next matching name.
7. Press N until you refer to the name you want. Then, press Y.
8. After you select the message group owner, enter the group name or number, and press ↵Enter.
   For numbered groups, the first three characters of the group name should be digits (*e.g.*, 234 Sales Group). For lettered groups, subscribers use the first three letters of the group name to leave messages for the group.
9. Record a name for the group. Establish a local connection and record the name. For details, refer to Section 3 Program Worksheet 2: The Opening Greeting on page 3-6.

✆ Add members to the message group:

1. Press F8.
2. Press ↵Enter to select **Member**.
3. Enter the first few letters of the first group member last name. The system displays the first matching name.
4. Press Y to add the subscriber to the group, or press N to display the next matching name. Press Y or N until you have added all the members to the message group.

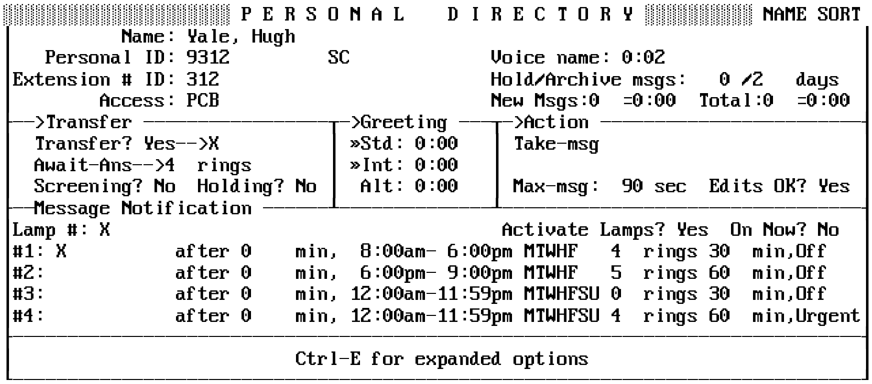
SECTION 13 PROGRAM WORKSHEET 12: SPECIAL SUBSCRIBER SETTINGS

Use this information to set up custom features for individual subscribers on the Personal Directory. Refer to Figure 3-17 Personal Directory Screen (Subscriber).

The subscribers added to the system with Worksheet 9 receive the default settings on Application Screen Page 5. However, there may be some subscribers who want features other than the default. Using this sheet as your guide, configure custom features by changing the settings on individual Personal Directory pages for those subscribers.

☞ This section assumes you have added the subscribers to the system. To add a new subscriber, follow the procedure in Figure 3-17 Personal

Directory Screen (Subscriber)



```
                     P E R S O N A L   D I R E C T O R Y             NAME SORT
          Name: Yale, Hugh
   Personal ID: 9312        SC            Voice name: 0:02
Extension # ID: 312                       Hold/Archive msgs:   0 /2   days
        Access: PCB                       New Msgs:0  =0:00  Total:0  =0:00
-->Transfer ------------------+->Greeting ---+->Action ------------------------
  Transfer? Yes-->X           |»Std: 0:00    | Take-msg
  Await-Ans-->4  rings        |»Int: 0:00    |
  Screening? No  Holding? No  | Alt: 0:00    | Max-msg:  90 sec  Edits OK? Yes
--Message Notification -------+--------------+---------------------------------
Lamp #: X                                     Activate Lamps? Yes  On Now? No
#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
```

Figure 3-17 Personal Directory Screen (Subscriber)

If you are not viewing the Personal Directory Screen, press Ctrl-D, and then press PageUp or PageDown (or use the Jump command) to display the correct subscriber.

Fill in the fields on the Personal Directory Screen using step 1 or step 2.

1. Enter new field values, and press ↵Enter.

2. Enter a code in the field, and press ↵Enter.
   The codes turn different features on or off, depending on the field. Determine the correct codes before you fill in.

Name, IDs, Hold/Archive Time

To change a subscriber Name, Personal ID, Extension # ID, or Hold/ Archive time, move the cursor to the field you want to change, enter the change, and press ↵Enter.

Add or Remove Access Codes

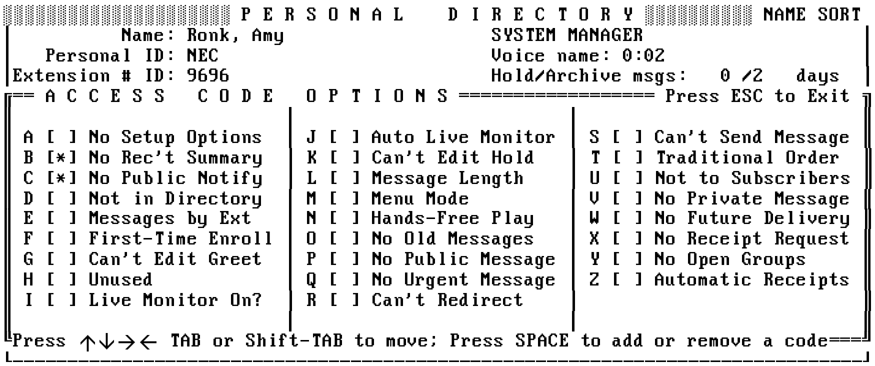
Access codes turn on or off certain features for the subscriber. Each code is a single letter representing a feature. You can add access codes to or remove them from the subscriber **Access** field, or you can use a special pop-up window to view all access code options and add or remove access codes for a subscriber. Refer to Figure 3-18 Access Code Options Window.

- Add or Remove an access code

  1. Highlight the **Access** field.
  2. Make sure your keyboard is in INSERT mode.
  3. To add a code, enter any missing letters.
  4. Move the cursor to any code you want to delete. To remove a code, press Delete.
  5. Press ↵Enter when you finish.

- View all access code options and add or remove access codes at the pop-up window:

  1. Press Ctrl-E.
  2. Press ↵Enter to select Access Codes.
  3. Press Tab, Shift-Tab, ↓, ↑, ←, or → to highlight the checkbox to the left of the description of the code.
  4. Press SpaceBar to add or remove the code.
  5. Press Esc to close the window.



```
░░░░░░░░░░░░░░░░░░░░░ P E R S O N A L   D I R E C T O R Y ░░░░░░░░░░ NAME SORT
|        Name: Ronk, Amy                    SYSTEM MANAGER                       |
|  Personal ID: NEC                         Voice name: 0:02                     |
|Extension # ID: 9696                       Hold/Archive msgs:   0 /2   days     |
╔== A C C E S S   C O D E   O P T I O N S ================= Press ESC to Exit ╗
║                          |                          |                        ║
║ A [ ] No Setup Options   | J [ ] Auto Live Monitor  | S [ ] Can't Send Message║
║ B [*] No Rec't Summary   | K [ ] Can't Edit Hold    | T [ ] Traditional Order ║
║ C [*] No Public Notify   | L [ ] Message Length     | U [ ] Not to Subscribers║
║ D [ ] Not in Directory   | M [ ] Menu Mode          | V [ ] No Private Message║
║ E [ ] Messages by Ext    | N [ ] Hands-Free Play    | W [ ] No Future Delivery║
║ F [ ] First-Time Enroll  | O [ ] No Old Messages    | X [ ] No Receipt Request║
║ G [ ] Can't Edit Greet   | P [ ] No Public Message  | Y [ ] No Open Groups    ║
║ H [ ] Unused             | Q [ ] No Urgent Message  | Z [ ] Automatic Receipts║
║ I [ ] Live Monitor On?   | R [ ] Can't Redirect     |                         ║
║                          |                          |                         ║
╚Press ↑↓→← TAB or Shift-TAB to move; Press SPACE to add or remove a code===╝
└─────────────────────────────────────────────────────────────────────────────┘
```

Figure 3-18 Access Code Options Window

An active code On the pop-up window has ***** in its checkbox.

After you open the Access Code Options window, it stays open as you scroll through the Personal Directory to view subscriber pages.

✆ Transfer?

When call transfer is turned on for a subscriber, you can set several custom features that control how the voice mail system transfers calls. The subscriber can turn call transfer on/off from any touchtone telephone. When call transfer is on, the custom settings configured on the Personal Directory page take effect. Even if call transfer is turned off for a particular subscriber, you may want to set up custom call transfer features. That way, when the subscriber turns call transfer on, the custom features are available.

1. Highlight this field.
2. To turn call transfer on, enter **Y**, and press ↵Enter.
3. After the →, enter X, and press ↵Enter if calls should be transferred to the subscriber extension. Or enter a different telephone extension number, and press ↵Enter.
4. To turn call transfer off, enter **N**, press ↵Enter, and skip the rest of this section.

✆ Call transfer type

The transfer type field, below the **Transfer?** field, is not labeled. The type can be Release, Await-Ans, or Wait-ring. To change the setting, position the cursor over the existing setting, and enter:

Worksheet Choice	**Enter**
Release	R, and press ↵Enter
Await Answer	A, and press ↵Enter
Wait for Ringback	W, and press ↵Enter

✆ →______ rings

In the rings field, enter the number of times the extension should ring before the caller is transferred to the subscriber voice mailbox, and press ↵Enter.

☞ This does not apply if you select **Release** call transfer.

✆ Screening?

1. To turn call screening on or off, move the cursor to this field.

2. To turn it on, enter **Y**, and press ↵Enter.

☞ You can use call screening only with Await Answer call transfer.

3. To turn call screening off, enter **N**, and press ↵Enter.

✆ Holding?

Set up call holding. In this field, enter:

Worksheet Choice	**Enter**
Yes	Y, and press ↵Enter
Vox	V, and press ↵Enter
No	N, and press ↵Enter

☞ You cannot use call holding with **Release** call transfer.

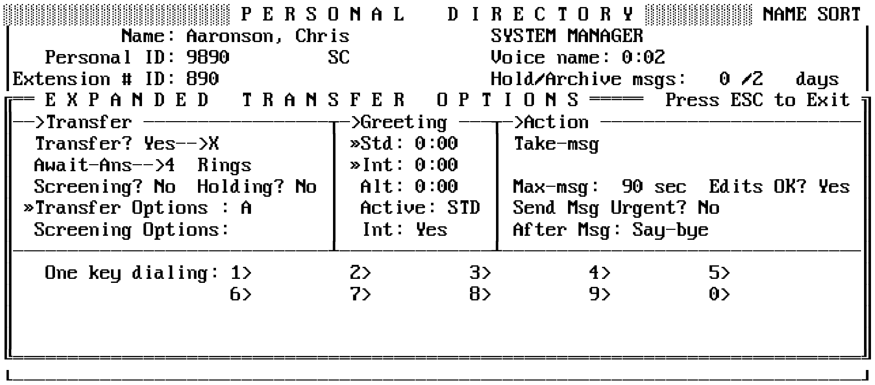
Expanded Transfer Options

Set up several custom call transfer features using the Expanded Transfer Options window. (Refer to Figure 3-19 Personal Directory Page with Expanded Transfer Options Displayed.)

✆ View Expanded Transfer Options for a subscriber:

1. At the subscriber Personal Directory Page, press Ctrl-E.

2. ↓ to highlight **Transfer Options**, and press ↵Enter.



```
░░░░░░░░░░░░░░░░░ P E R S O N A L   D I R E C T O R Y ░░░░░░░░ NAME SORT
          Name: Aaronson, Chris               SYSTEM MANAGER
   Personal ID: 9890         SC               Voice name: 0:02
Extension # ID: 890                           Hold/Archive msgs:   0 /2   days
== E X P A N D E D   T R A N S F E R   O P T I O N S ====  Press ESC to Exit
-->Transfer ---------------->Greeting ---->Action ----------------------
  Transfer? Yes-->X          »Std: 0:00   Take-msg
  Await-Ans-->4  Rings       »Int: 0:00
  Screening? No  Holding? No  Alt: 0:00   Max-msg:  90 sec  Edits OK? Yes
 »Transfer Options : A        Active: STD Send Msg Urgent? No
  Screening Options:          Int: Yes    After Msg: Say-bye

   One key dialing: 1>          2>          3>          4>          5>
                    6>          7>          8>          9>          0>
```

Figure 3-19 Personal Directory Page with Expanded Transfer Options Displayed

After you open the Expanded Transfer Options window, it stays open as you scroll through the Personal Directory.

3. Move cursor to **Transfer Options** field.

☞ Voice mail uses these options if call transfer is **Await-Ans** and turned on.

4. Enter as many of these codes in the field as you need:

Worksheet Choice	**Enter**
Announce	A, and press ↵Enter
Confirm	C, and press ↵Enter
Introduce	I, and press ↵Enter
Message Screen	M, and press ↵Enter
Screen	S, and press ↵Enter

☞ Do not use both M and S.

✆ Screening Options

1. Move the cursor to this field.

☞ The voice mail system uses these options when call screening is turned on, and call transfer is **Await-Ans**.

2. Enter as many of these codes in the field as you need.

Worksheet Choice	**Enter**
Announce	A, and press ↵Enter
Confirm	C, and press ↵Enter
Introduce	I, and press ↵Enter
Message Screen	M, and press ↵Enter
Screen	S, and press ↵Enter

☞ Do not use the M and S options together.

→Action

1. Move the cursor to the field underneath →Action.

2. Enter the code that indicates how you want the voice mail system to handle the call after playing the subscriber personal greeting. Your options are:

Worksheet Choice	**Enter**
Take a Message	T, and press ↵Enter
Transfer to Operator	O, and press ↵Enter
Say–bye	S, and press ↵Enter
Hang up	H, and press ↵Enter
Go to Another ID	G, and press ↵Enter (Specify System ID)
Restart a Call	R, and press ↵Enter

✆ Take–msg

If the Action is Take-msg, these additional parameters affect the way the system takes the message.

- Max–msg:
    1. Move the cursor to this field.
    2. Enter the number of seconds a message from an outside caller can last, and press ↵Enter.
- Edits OK?
    1. Move the cursor to this field.
    2. To allow outside callers to record their messages to this subscriber, enter **Y**, and press ↵Enter.
    3. To prevent callers from recording their message again, enter **N**, and press ↵Enter.
- Send Msg Urgent?
    1. Move the cursor to this field.
    2. To set the system to mark all messages from outside callers urgent, enter **Y**, and press ↵Enter.
    3. To keep outside callers from marking messages urgent, enter **N**, and press ↵Enter.
    4. To set the system to ask callers if they want to send their message urgent, enter **A,** and press ↵Enter.

- After msg:

  1. Move the cursor to this field.

  2. Enter the code for the action you want the system to take after recording a message from an outside caller. The choices are:

Worksheet Choice	**Enter**
Transfer to Operator	O, and press ↵Enter
Say–bye	S, and press ↵Enter
Hang up	H, and press ↵Enter
Go to Another ID	G, and press ↵Enter (Specify ID)
Restart a Call	R, and press ↵Enter

✆ One key dialing

1. Use the One key dialing portion of the Expanded Transfer Options screen to set up single digits to indicate full System IDs for other transaction boxes, interview boxes, or subscriber extension numbers.

2. Move the cursor to the number you want to use.

3. Enter the System ID, and press ↵Enter.

4. Press Esc to close the Expanded Transfer Options window.

Message Notification

If you are looking at the Expanded Transfer Options on the subscriber Personal Directory page, press Esc to close it. The system displays the **Message Notification** part of the screen. This is where you set up message notification and delivery settings for the subscriber.

✆ Lamp #

Enter the area code and number the voice mail system should dial to turn a message waiting lamp on or off for the subscriber, and press ↵Enter. Use **X** for the subscriber extension number.

✆ Activate Lamps?

1. Enter **Y**, and press ↵Enter to indicate if the voice mail system should activate message waiting lamps.
2. If you select **Y**, also check the Message Lamp On and Off codes at the top of Switch Setup Screen Page 2 to verify that they are the correct codes for your telephone system. These codes were configured automatically when you selected your NEC telephone system. (Refer to Section 2 Program Worksheet 1: Site Information on page 3-2.)
3. Enter **N**, and press ↵Enter to indicate if the voice mail system should not activate message waiting lamps.

Message delivery telephone numbers

Fill in the specifics for each message delivery telephone number on the last 4 lines of the Message Notification screen. For each telephone number you want the voice mail system to call to deliver messages, fill in the following:

☞ For details about the special characters you can use in message delivery telephone numbers, refer to the EliteMail VMS/EliteMail Limited Technician Guide. These characters allow you to program pauses and other special dialing for your NEC telephone system.

✆ #1
Enter the telephone number (or **X**) you want the system to dial, and press ↵Enter.

✆ after _____ min

Enter the number of minutes you want the voice mail system to wait after a new message arrives, and press ↵Enter.

☞ This applies only to batch message delivery.

✆ Delivery Schedule

1. Enter the time the voice mail system should start delivering messages, and press ↵Enter.
2. Enter the time the voice mail system should stop delivering messages, and press ↵Enter.
3. Enter the days of the week the voice mail system should follow this delivery schedule, and press ↵Enter. Use these letters:

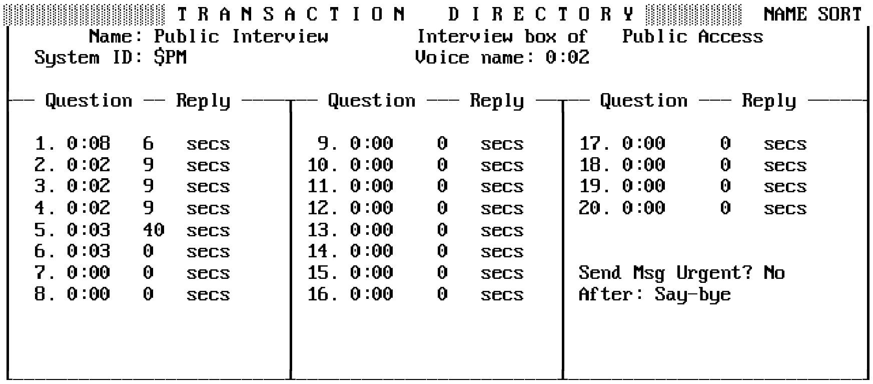
M	Monday
T	Tuesday
W	Wednesday
H	Thursday
F	Friday
S	Saturday
U	Sunday

4. Enter the number of times the voice mail system should ring the extension before hanging up, and press ↵Enter.
5. Enter the time between retries, and press ↵Enter.
6. Enter a code to select a delivery method, and press ↵Enter. Use these letters:

B	Batch
E	Each
U	Urgent
O	Off

Section 14 Program Worksheet 13: Public Interview Box

Use this information on the Public Interview Box page. (Refer to Figure 3-20 Transaction Directory, Public Interview Box.)



```
░░░░░░░░░░░░░░░ T R A N S A C T I O N   D I R E C T O R Y ░░░░░░░░░  NAME 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
```

Figure 3-20 Transaction Directory, Public Interview Box

If not viewing the Transaction Directory, press Ctrl-T. Press PageUp or PageDown (or use the Jump command) to display the Public Interview Box.

Record Interview Box Questions

To record questions in an interview box, first establish a local connection, then make the recordings. To establish a local connection, refer to Section 3 Program Worksheet 2: The Opening Greeting on page 3-6. After you record each question, enter the maximum reply time (in seconds) immediately to the right of the question.

✆ Send Msg Urgent?

1. Move the cursor to this field.
2. To set the system to mark all messages left in the interview box urgent enter **Y**, and press ↵Enter.
3. To keep outside callers from marking messages urgent, enter **N**, and press ↵Enter.
4. To set the system to ask callers if the message is urgent, enter **A**, and press ↵Enter.

✆ After :

Depending on checked action on the worksheet, enter the following.

Worksheet Choice	Enter
Say–bye and Hang up	S, and press ↵Enter
Transfer Caller to Operator	O, and press ↵Enter
Restart Call	R, and press ↵Enter
Try another System ID	G, and press ↵Enter (Specify ID)
Hang up	H, and press ↵Enter

SECTION 15
PROGRAM WORKSHEETS 14 & 15: MENUS AND INTERVIEWS

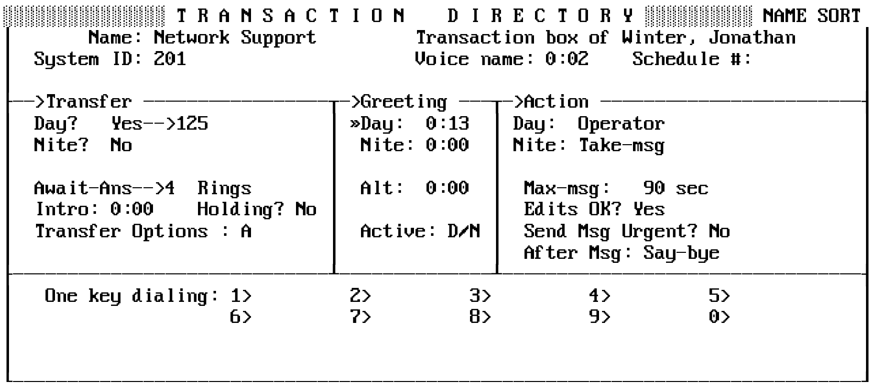
The Menus & Interviews Map (Worksheet 14) and the Menus & Interviews List (Worksheet 15) are a guide to help design your application transaction boxes, voice detect boxes, and interview boxes.

Complete separate Worksheet 16 for each (transaction box or voice detect box) or Program Worksheet 17: Interview Boxes (for an interview box).

Then configure each transaction box, voice detect box, or interview box from those worksheets.

SECTION 16 PROGRAM WORKSHEET 16: TRANSACTION BOXES

For each copy you fill in, add a transaction box to the system at the Transaction Directory. (Refer to Figure 3-21 Sample Transaction Box.)



```
░░░░░░░░░░░░░░ T R A N S A C T I O N   D I R E C T O R Y ░░░░░░░░░ NAME SORT
|      Name: Network Support          Transaction box of Winter, Jonathan    |
|  System ID: 201                     Voice name: 0:02    Schedule #:        |
|                                                                            |
|-->Transfer ----------------------->Greeting ---->Action ------------------|
|  Day?   Yes-->125            |»Day:  0:13   | Day:  Operator              |
|  Nite?  No                   | Nite: 0:00   | Nite: Take-msg              |
|                              |              |                             |
|  Await-Ans-->4  Rings        | Alt:  0:00   |  Max-msg:   90 sec          |
|  Intro: 0:00    Holding? No  |              |  Edits OK? Yes              |
|  Transfer Options : A        | Active: D/N  |  Send Msg Urgent? No        |
|                              |              |  After Msg: Say-bye         |
|----------------------------------------------------------------------------|
|   One key dialing: 1>         2>         3>         4>         5>          |
|                    6>         7>         8>         9>         0>          |
|                                                                            |
|____________________________________________________________________________|
```

Figure 3-21 Sample Transaction Box

To view the Transaction Directory, press Ctrl-T.

☞ When you add a transaction box, the system copies the call transfer and action parameters from the transaction box you are viewing when you add the box.

Add a Transaction Box

1. If necessary, press Ctrl-T to access the Transaction Directory.
2. Press F8 for the Add Menu.
3. Select **Transaction box**. You are prompted with:

   Add transaction box for <System Manager name>? (Y/N).

4. Enter Y, and press ↵Enter if you want the box for the system manager or enter N, and press ↵Enter if you want the box to belong to a different subscriber.
5. If you enter N, You are then prompted with:

   Add transaction box for which subscriber (enter last name):

6. Enter the last name of the subscriber who owns the box. Any letter or word that you enter puts you into an alphabetical list of subscribers with the following confirmation prompts:

   Add transaction box for subscriber <NAME>

   (Press ESC to quit)? (Y/N)

7. If you enter N, and press ↵Enter, the same prompt offers the name of the next subscriber in the system.

8. If you press ↵Enter for Yes, you are then prompted for the System ID and name of the transaction box.

9. Enter the System ID for the transaction box, and press ↵Enter.

10. Enter the name of the transaction box, and press ↵Enter. The name must be entered. The first three letters of this name may be used by the subscriber owning the box to record new greetings. (If your system has been set up for numeric access only, the owner may use the box System ID to record greetings.) The system then displays the new transaction box on screen.

11. After adding a transaction box, record a name and greetings for the box. To establish a local connection and make recordings, refer to Section 3 Program Worksheet 2: The Opening Greeting on page 3-6

Transfer

✆ Day?

1. Highlight this field.

2. Enter **Y**, and press ↵Enter.

3. Enter the extension number, and press ↵Enter.

✆ Nite?

1. Highlight this field.
2. Enter **Y**, and press ↵Enter.
3. Enter the extension number, and press ↵Enter.

✆ Call transfer type

Set the call transfer type. This field below the **Nite?** field, is not labeled. Select Await-Ans, Release, or Wait-ring. To change the setting, position the cursor on the field, and enter:

Worksheet Choice	**Enter**
Release	R, and press ↵Enter
Await Answer	A, and press ↵Enter
Wait for Ringback	W, and press ↵Enter

✆ → _______ rings

In the **rings** field, enter the number of times the extension should ring before giving up on call transfer, and press ↵Enter.

☞ This does not apply if you selected **Release** call transfer.

✆ Transfer options

1. Move cursor to this field.

☞ Voice mail uses these options when call transfer is on, and transfer type is **Await-Ans**.

2. Enter as many of these codes in the field as you need:

Worksheet Choice	Enter
Announce	A, and press ↵Enter
Confirm	C, and press ↵Enter
introduce	I, and press ↵Enter
Message Screen	M, and press ↵Enter
Screen	S, and press ↵Enter

☞ Do not use the M and the S transfer options together.

✆ Holding?

1. To turn call holding on or off, move the cursor to this field.

2. To turn it on, enter **Y**, and press ↵Enter.

3. To turn call holding off, enter **N**, and press ↵Enter.

☞ You cannot use call holding with Release call transfer.

→Action

✆ Day:

1. Move the cursor to this field.

2. Refer to table below, and enter the code that indicates how you want the voice mail system to handle day calls after playing the box greeting.

✆ Nite:

1. Move the cursor to this field.

2. Refer to table below, and enter the code that indicates how you want the voice mail system to handle night calls after playing the box greeting.

Worksheet Choice	**Enter**
Take a Message	T, and press ↵Enter
Transfer to Operator	O, and press ↵Enter
Say–bye	S, and press ↵Enter
Hang up	H, and press ↵Enter
Go to Another ID	G, and press ↵Enter (Specify System ID)
Restart a Call	R, and press ↵Enter

✆ Take–msg

The additional fields below affect the way the system takes the message.

- Max–msg:
  1. Move the cursor to this field.
  2. Enter the time in seconds a message from an outside caller can last, and press ↵Enter.
- Edits OK?
  1. Move the cursor to this field.
  2. To allow outside callers to record messages to this box again, enter **Y**, and press ↵Enter.
  3. To prevent callers from recording messages to this box, enter **N**, and press ↵Enter.

- Send Msg Urgent?

  1. Move the cursor to this field.
  2. To set the system to mark all messages for this transaction box urgent, enter **Y**, and press ↵Enter.
  3. To keep outside callers from marking messages urgent, enter **N**, and press ↵Enter.
  4. To set the system to ask callers if they want to send their message urgent, enter **A,** and press ↵Enter.

- After Msg:

  1. Move the cursor to this field.
  2. Enter the code for the action you want the system to take after recording a message from an outside caller. The choices are:

Worksheet Choice	**Enter**
Transfer to Operator	O, and press ↵Enter
Say–bye	S, and press ↵Enter
Hang up	H, and press ↵Enter
Go to Another ID	G, and press ↵Enter (Specify System ID)
Restart a Call	R, and press ↵Enter

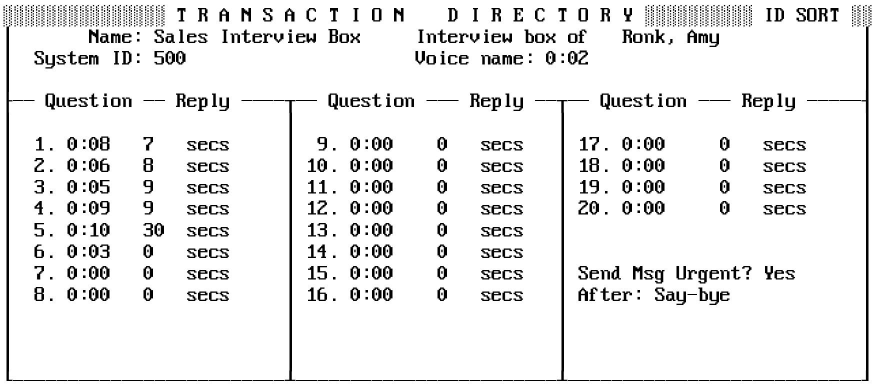
✆ One key dialing

Use this part of the screen to set up single digits to represent full System IDs for other transaction boxes, interview boxes, or subscriber extension numbers.

1. Move the cursor to the number you want to use.
2. Enter the System ID, and press ↵Enter.

SECTION 17 PROGRAM WORKSHEET 17: INTERVIEW BOXES

For each completed copy, add an interview box at the Transaction Directory.



```
T R A N S A C T I O N   D I R E C T O R Y  ID SORT
      Name: Sales Interview Box     Interview box of   Ronk, Amy
 System ID: 500                     Voice name: 0:02

-- Question -- Reply ----- Question --- Reply --- Question --- Reply -----

 1. 0:08   7   secs      9. 0:00    0   secs     17. 0:00     0   secs
 2. 0:06   8   secs     10. 0:00    0   secs     18. 0:00     0   secs
 3. 0:05   9   secs     11. 0:00    0   secs     19. 0:00     0   secs
 4. 0:09   9   secs     12. 0:00    0   secs     20. 0:00     0   secs
 5. 0:10   30  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? Yes
 8. 0:00   0   secs     16. 0:00    0   secs     After: Say-bye
```

Figure 3-22 Sample Interview Box

If you are not viewing the Transaction Directory, press Ctrl-T.

Add an Interview Box

1. Press F8 for the Add Menu.

2. Press ↓ and ↵Enter to select **Interview box**. You are prompted with:

   Add interview box for <System Manager name>? (Y/N)

3. Enter Y, and press ↵Enter if you want the box to belong to a system manager or enter N, and press ↵Enter if you want the box to belong to a different subscriber.

4. If you enter N, You are then prompted with:

   Add interview box for which subscriber (enter last name):

5. Enter the last name of the subscriber who owns the box. Any letter or word you enter puts you in an alphabetical list of subscribers with the following confirmation prompts:

   Add interview box for subscriber <NAME>

   (Press ESC to quit)? (Y/N):

6. If you enter N, and press ↵Enter, the same prompt offers the name of the next subscriber (alphabetically) in the system.

7. If you press ↵Enter, you are prompted for the System ID and name of the interview box.

8. Enter the System ID, and press ↵Enter.

9. Enter the name of the interview box, and press ↵Enter. You must enter a name. The system then displays the new interview box on screen.

10. After adding an interview box, record a name for the box. Follow the steps to establish a local connection and record the name. To establish a local connection, refer to Section 3 Program Worksheet 2: The Opening Greeting on page 3-6.

Record Interview Box Questions

To record an interview box questions, establish a local connection and make the recordings. After you record each question, enter the maximum reply time (in seconds) immediately to the right of the question.

✆ Send Msg Urgent?

1. Move the cursor to this field.

2. To set the system to mark all messages left in the interview box urgent, enter **Y**, and press ↵Enter.

3. To keep outside callers from marking messages urgent, enter **N**, and press ↵Enter.

4. To set the system to ask callers if the message is urgent, enter **A**, and press ↵Enter.

✆ After :

Depending on checked action on the worksheet, enter the following in the **After** field.

Worksheet Choice	Enter
Say–bye and Hang up	S, and press ↵Enter
Transfer Caller to Operator	O, and press ↵Enter
Restart a Call	R, and press ↵Enter
Go to Another ID	G, and press ↵Enter (Specify System ID)
Hang up	H, and press ↵Enter

Worksheets

APPENDIX A

Worksheet 1	**Site Information**

1. Site name

2. Contact name | Phone #

Calls Answered

3. Total number of trunks | Number of calls per day
Total number of stations

4. Day calls to be answered (check one)
☐ All trunks (default)
☐ Some trunks
☐ No trunks (forwarded calls only)

Night calls to be answered (check one)
☐ All trunks (default)
☐ Some trunks
☐ No trunks (forwarded calls only)

5. Action to take for overflow calls, when all system ports are busy (check one)
☐ Ring system until it answers (default) (System answers as soon as a port is free.)
☐ Forward calls to Operator (Live Operator handles overflow calls.)
☐ Issue busy tone

System Access Numbers

6. Trunk pilot number______________________ Number of trunks answered by system ___________________
Alternate trunk numbers _________________

7. Voice Port Stations | Station pilot number

Station Number for each port:

1. _______________	2._______________	3. ________________	4. ________________
5. _______________	6. _______________	7. _______________	8. _______________
9. _______________	10. _______________	11. _______________	12. _______________
13. _______________	14. _______________	15. _______________	16. _______________
17. _______________	18. _______________	19. _______________	20. _______________
21. _______________	22. _______________	23. _______________	24. _______________
25. _______________	26. _______________	27. _______________	28. _______________
29. _______________	30. _______________	31. _______________	32. _______________
33. _______________	34. _______________	35. _______________	36 ._______________

Telephone System Information

Manufacturer	Model	Software Release #

Switch Setup Screen Page 1

Keypad Map

☐ Default (Q=7, Z=9)
☐ QZ on the 1 Key
☐ QZ on the 0 Key
☐ Swedish Keypad
☐ Numbers Only Keypad

Worksheet 2

The Opening Greeting

The opening greeting is recorded in a default transaction Box ($Greeting). You may select the default prompt or enter an announcement suitable for your application. Also identify what should happen if the caller does not respond to the prompts.

System ID

Call Transfer

Transfer the calls reaching this box to an extension?
Day hours ☐ Yes, to extensio ______ ☐ No (default)
Night hours ☐ Yes, to extension _____ ☐ No (default)

Call transfer type ☐ Await Answer for ___ rings(default) (3 rings or more) ☐ Release ☐ Wait for Ringback for ___ rings (3 rings or more)

Transfer options ☐ **A**nnounce ☐ **C**onfirm ☐ **I**ntroduce ☐ **M**essage Screen ☐ **S**creen ☐ None
(Use only with Await Answer call transfer)

Use call holding? ☐ Yes ☐ Vox ☐ No (default)
(Do not use with Release call transfer)

Greeting

Day Greeting ____

Night Greeting ____

Use one-key dialing during greeting? ☐ Yes ☐ No (default)

1 = __________ 2 = __________ 3 = __________ 4 = _________ 5 = _________
6 = __________ 7 = __________ 8 = __________ 9 = _________ 0 = _________

Action After Greeting

Day	Night	(check one box for Day hours and one box for Night hours)
☐	☐	Say Goodbye then hang up
☐	☐	Transfer the caller to the operator
☐	☐	Restart the call at the opening greeting
☐	☐	Route the call to another subscriber or transaction box (Use Go-to-ID ->)
☐	☐	Interview the caller (Use Go-to-ID→ $PM)
☐	☐	Take a message

If taking message:
Maximum Message Length _____ seconds Allow caller to edit message? ☐ Yes (default) ☐ No
Mark the messages urgent? ☐ Yes ☐ No (defaulkt) ☐ Ask
Action after message? ____

Transaction Directory

Worksheet 3 — Operator Handling

20. When is an operator available to handle calls?

Day ☐ Yes(default) ☐ No
Night ☐ Yes ☐ No (default)

Transferring Calls to the Operator

What is the operator extension number on the telephone system? **Day** ☐ 0 (zero) ☐ ______
Night ☐ 0 (zero) ☐ ______

Call transfer type to use for operator extension
☐ Release(default)
☐ Await Answer for ______ rings
☐ Wait for Ringback for ______ rings
(3 rings or more)

Application Screen Page 3

Worksheet 4 — System Schedules

Use this worksheet to define the system Day Mode operating schedule. This usually matches the company office hours. All other hours the system operates in Night Mode. You may specify up to three ranges of hours and days for Day Mode operation.

31. Daytime Schedule (Enter up to three ranges of hours and days for Schedule #1)

a: _____ **am / pm** to _____ **am / pm** on **M**on **T**ue **W**ed T**H**u **F**ri **S**at S**U**n
b: _____ **am / pm** to _____ **am / pm** on **M**on **T**ue **W**ed T**H**u **F**ri **S**at S**U**n
c: _____ **am / pm** to _____ **am / pm** on **M**on **T**ue **W**ed T**H**u **F**ri **S**at S**U**n

Ignore holidays? ☐ Yes ☐ No(default)

32. Special Schedule (#4) ☐ Day ☐ Night

33. Holidays (Write in the day and month of up to eighteen holidays)

__________ __________ __________ __________ __________ __________
__________ __________ __________ __________ __________ __________
__________ __________ __________ __________ __________ __________

34. Automatically adjust system for Daylight Savings Time?

☐ Yes Date On _____ Date Off ______
☐ No

Application Screen Page 4

Worksheet 5 — Default Subscriber Settings

Use this worksheet to specify settings that apply to *most* subscribers, including settings for Personal IDs, how calls are transferred, if message waiting lamps are used, and if the system calls the subscriber to deliver messages. You may specify custom settings for individual subscribers on another worksheet.

Personal ID & Access Codes

The system automatically assigns a Personal ID to a new subscriber by adding one or more digits to the subscriber extension (X). For example, 9X creates a Personal ID of 9100 for extension 100.

Access codes allow or deny subscribers particular features of the system. Refer to the *Application Manual* or the system on-line help for access code definitions.

	Default	Change to:
Personal ID for Subscribers	9X	______________________
Access Codes	PCBF	______________________

Call Transfer

Transfer calls to subscribers? ☐ Yes (default) ☐ No

Call transfer type

☐ Await Answer for ______ rings (default)
☐ Release
☐ Wait for Ringback for ______ rings
(3 rings or more)

Use call screening? ☐ Yes ☐ No (default)
(Use only with Await Answer call transfer)

Use call holding? ☐ Yes ☐ Vox ☐ No (default)
(Do not use with Release call transfer)

Message Notification

Activate message waiting lamps for new messages? ☐ Yes (default) ☐ No
(The telephone system must be programmed to support message waiting lamps or indicators)

Message Delivery

Should the system call the subscriber extension to deliver new messages? ☐ Yes ☐ No (default)

☐ Wait ______ minutes after a new message arrives before trying to call.
Hours to deliver: _______ **am / pm** to _______ **am / pm** on **M**on **T**ue **W**ed T**H**u **F**ri **S**at S**U**n
Ring the extension for ______ rings before hanging up (3 or more rings)

Choose one of the following:

☐ Deliver **each** new message as it arrives. If no answer, try again every _____ minutes.
☐ Deliver a **batch** of new messages every ______ minutes.
☐ Deliver **urgent** messages, as soon as they arrive. If no answer, try again every _____ minutes.

Application Screen Page 5

Worksheet 6 — System Security

Use this worksheet to specify several system-wide features that protect your system from unauthorized access and from certain system errors.

53. How many times should a caller be allowed to misdial?

☐ 4 times (default) ☐ ___________ times

Should a caller be routed to another System ID for help after misdialing repeatedly?

☐ No (system hangs up) (default) ☐ Yes, route to System ID ____________

55. When should the system ask subscribers to delete unnecessary messages?

☐ When there is less than 15 minutes of message storage space left (default)

☐ When there is less than ________ minutes of message storage space left

58. Who should receive a voice message if a system error occurs?

☐ Everyone who receives public messages (default)

☐ These subscribers: Name:__________________________ Personal ID:_________________

Name:__________________________ Personal ID: _________________

Name:__________________________ Personal ID: _________________

Application Screen Page 6

Worksheet 7 — Directory Assistance

The voice mail system offers an automatic directory of extensions, numeric directory assistance, and a special Departments transaction box to help callers find out the extension number of the person or department they are trying to reach. Use this worksheet to choose the directory assistance the system provides.

Directory Assistance

		Default ID	Change to:	Make change on:
☐	Automatic directory assistance	555	______	*Application Screen Page 6*
	Should the system automatically route the caller if there is only one matching name in the automatic directory? ☐ Yes (default) ☐ No			
☐	Numeric directory assistance	$411	_______	*Groups Screen*
☐	Departments transaction box	411	_______	*Transaction Directory*

Worksheet 8 — Public Fax Box

You can route incoming faxes to a particular extension, known as the Public Fax Box. This extension is then connected to one or more fax machines. Use this worksheet to specify how to set up the Public Fax Box. If you are not using the Public Fax Box, you may skip this worksheet.

Fax ID: ☐ $_FAXBOX (default) ☐ FAX (329) ☐ Other: ____________________

Voice Name: ☐ *"...the Public Fax Box..."* (default) ☐ Other: ____________________

NOTE: If you use the default Fax System ID, callers cannot dial the Public Fax Box directly.

Transfer calls to the Public Fax Box? ☐ Yes, to extension _____ ☐ No (Turn off Public Fax Box) (default)

Call transfer type ☐ Await Answer for _____ rings (default) ☐ Release ☐ Wait for Ringback for ____ rings

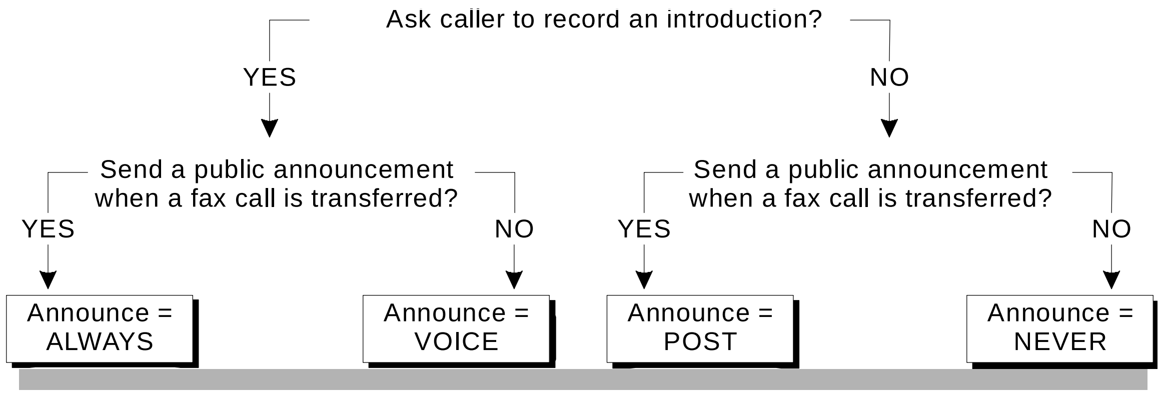
Use call holding? ☐ Yes ☐ Vox ☐ No (default) (Do not use holding with Release call transfer)

Alternate Action: (if fax call transfer is unsuccessful)

☐ Say Goodbye then hang up
☐ Transfer call to the operator (default)
☐ Restart call at the opening greeting
☐ Route call to another subscriber or transaction box (Use Go-to-ID -> ______)
☐ Hang up

Announce Options

Use this decision chart to decide how to handle manual fax calls and how to announce calls that are transferred to the Public Fax Box. Circle the choice you want for Announce=.


Ask caller to record an introduction?
YES
NO
Send a public announcement when a fax call is transferred?
YES
NO
Send a public announcement when a fax call is transferred?
YES
NO
Announce = ALWAYS
Announce = VOICE
Announce = POST
Announce = NEVER

Application Screen Page 6

Worksheet 9	**Subscriber List**
Page___ of____	

If you are adding subscribers **by range**, list the range(s) of Extension IDs (for example, 210-320). If you are adding subscribers **one-by-one**, make as many copies of this worksheet as necessary to list all subscribers. For each person, enter the full name and extension number, with the lowest extension number first. Also, check off any subscribers you do NOT want listed in directory assistance. If you have a list or directory of all personnel and their extension numbers, you may use it in place of this worksheet.

Extension # ID Range 1 Start: ____________ Stop: _____________
Extension # ID Range 2 Start: ____________ Stop: _____________
Extension # ID Range 3 Start: ____________ Stop: _____________

Extension	**Last Name**	**First & Middle Names**	**Unlisted**
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐

Personal Directory Screen

Worksheet 10	**Guests**
Page___ of ___	

A subscriber may have one or more guests. Like subscribers, guests can leave and receive messages on the system. Guests are usually important clients, family members, or others with whom a subscriber wants regular, two-way communication. Make as many copies of this worksheet as you need to list the host subscriber, guest name, and guest personal ID. If the subscriber wants to receive the guest messages as urgent messages, put a check mark next to the guest name..

Host Subscriber	**Guest Name**	**Guest Personal ID**	**Urgent?**
______________	____________________	___________________	☐
______________	____________________	___________________	☐
______________	____________________	___________________	☐
______________	____________________	___________________	☐
______________	____________________	___________________	☐
______________	____________________	___________________	☐
______________	____________________	___________________	☐
______________	____________________	___________________	☐
______________	____________________	___________________	☐
______________	____________________	___________________	☐
______________	____________________	___________________	☐

Personal Directory Screen

Worksheet 11	**Message Groups**
Page___ of ___	
Subscribers that want to regularly send messages to a group of other subscibers or guests can create a message group by phone. Decide whether messages should begin with letters or numbers. If a message group begins with numbers, include the special System ID for sending group messages. For each group you need, enter the group name or number and the group owner. Indicate if the owner is the only one that can send messages to the group. A group can also be set for dispatch distribution so that only the first person to hear the message actually receives it	
Select message groups by name or by number? ☐ Use named groups (Message group names begin with 3 letters) ☐ Use numbered groups (Message group names begin with 3 numbers) System ID for numbered groups: ___________ *(Application Screen Page 6)*	
Group Name or Number:	Group Owner:
Deliver the message *only* to the first person who hears it? ☐ Yes (DISPATCH distribution) ☐ No (default)	Can someone besides the owner send a message to this group? ☐ Yes (OPEN group) ☐ No (default) (PRIVATE group)
Group Members ____ ____ ____ ____ ____ ____ ____ ____ ____ ____ ____ ____	___________________________________ ___________________________________ ___________________________________ ___________________________________ ___________________________________ ___________________________________ ___________________________________ ___________________________________ ___________________________________ ___________________________________ ___________________________________ ___________________________________
	Groups Screen

Worksheet 12	**Special Subscriber Settings**

Page___ of ___

Name ______________________________________
Personal ID ________________________________
Extension # ID ______________________________ Hold / Archive messages / days
Access Codes ________________________________

Call Transfer

Transfer calls to subscriber? ☐ Yes (default) ☐ No
Call transfer type ☐ Await Answer for ___ rings (default) (3 rings or more) ☐ Release ☐ Wait for Ringback for ____ rings (3 rings or more)
Turn screening options on? ☐ Yes ☐ No **(default)** **Use call holding?** ☐ Yes ☐ Vox ☐ No(default)
(Do not use with Release call transfer)
Transfer options ☐ **A**nnounce ☐ **C**onfirm ☐ **I**ntroduce ☐ **M**essage Screen ☐ **S**creen ☐ None
Screening options ☐ **A**nnounce ☐ **C**onfirm ☐ **I**ntroduce ☐ **M**essage Screen ☐ **S**creen ☐ None
(Use transfer and screening options only with Await Answer call transfer)

Action After Greeting

☐ Take a message ☐ Other Action ____
If taking message:
Maximum Message Length _____ seconds Allow caller to edit message? ☐ Yes (default) ☐ No
Mark the messages urgent? ☐ Yes ☐ No (default) ☐ Ask
Action after message? ___________________________________
Use one-key dialing during greeting? ☐ Yes ☐ No (default)

Message Notification & Delivery

Lamp # _____ Activate message waiting lamps for new messages? ☐ Yes (default) ☐ No
(The telephone system must be programmed to support message waiting lamps or indicators)

Phone #1 ________________ Wait ______ minutes before trying to call.
Hours to deliver: ______ **am / pm** to ______ **am / pm** on **M**on **T**ue **W**ed T**H**u **F**ri **S**at S**U**n
Try for ______ rings before hanging up. Try again in ______ minutes.
Deliver ☐ **Each** new message ☐ **Batches** of new messages ☐ **Urgent** messages only

Phone #2 ________________ Wait ______ minutes before trying to call.
Hours to deliver: ______ **am / pm** to ________ **am / pm** on **M**on **T**ue **W**ed T**H**u **F**ri **S**at S**U**n
Try for _______ rings before hanging up. Try again in ______ minutes.
Deliver ☐ **Each** new message ☐ **Batches** of new messages ☐ **Urgent** messages only

Phone #3 _________________ Wait_______ minutes before trying to call.
Hours to deliver: ______ **am / pm** to _______ **am / pm** on **M**on **T**ue **W**ed T**H**u **F**ri **S**at S**U**n
Try for _______ rings before hanging up. Try again in ________ minutes.
Deliver ☐ **Each** new message ☐ **Batches** of new messages ☐ **Urgent** messages only

Personal Directory Screen

Worksheet 13 **The Public Interview Box**

Page____ of ____

The Public Interview Box is a special interview box owned by the system. When an operator is not on duty, it can collect messages from callers who don't know where to send their message. The messages are delivered to all subscribers with public message access. There is only one Public Interview Box, and it cannot be removed from the system. If you are not using the Public Interview Box, you may skip this worksheet.

Enter the questions to be asked the caller and the maximum time allowed for the caller answer.

System ID for Public Interview Box ☐ $PM (default) ☐ Other

Question **Max Response**
(in seconds)

1. ____ __________
2. ____ __________
3. ____ __________
4. ____ __________
5. ____ __________
6. ____ __________
7. ____ __________
8. ____ __________
9. ____ __________
10. ____ __________
11. ____ __________
12. ____ __________
13. ____ __________
14. ____ __________
15. ____ __________
16. ____ __________
17. ____ __________
18. ____ __________
19. ____ __________
20. ____ __________

Should outside callers be allowed to mark messages urgent? ☐ Yes ☐ No (default) ☐ Ask

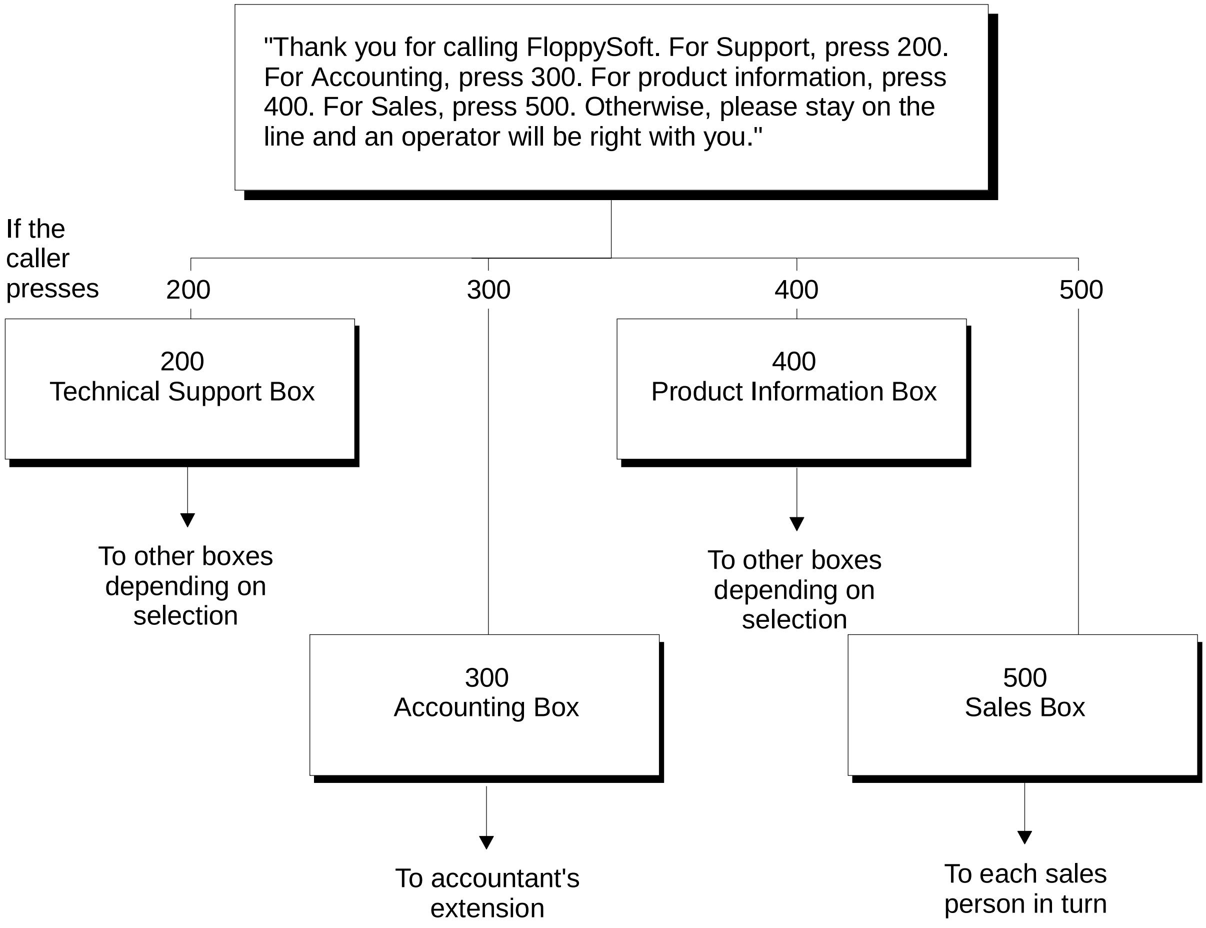
Action after last question

☐ Say goodbye, then hang up (default)
☐ Transfer call to operator
☐ Restart the call at the opening greeting
☐ Route the call to another subscriber or transaction box (Use Go-to-ID→______)
☐ Hang up (The system does not say anything after the last question.)

Transaction Directory, Public Interview

Worksheet 14	**Menus & Interviews Map**

Use this sheet to draw a map or diagram of any personnel directories, information menus, or special call routing to use in your application. You can then use the *Menus & Interviews List* worksheet to list the transaction boxes required for this part of your application.


"Thank you for calling FloppySoft. For Support, press 200. For Accounting, press 300. For product information, press 400. For Sales, press 500. Otherwise, please stay on the line and an operator will be right with you."
If the caller presses
200
300
400
500
200 Technical Support Box
400 Product Information Box
To other boxes depending on selection
To other boxes depending on selection
300 Accounting Box
500 Sales Box
To accountant's extension
To each sales person in turn

Worksheet 15	**Menus & Interviews List**

Page___ of ___

List here the transaction boxes or interview boxes you need to complete the application features designed in the previous worksheet. Make as many copies of this worksheet as you need. For each box listed here, you should also complete an individual *Transaction Box* or *Interview Box* worksheet.

System ID	Name	Owner
Transfer? ☐ Yes, to Ext. # ______ ☐ No	Greeting ☐ None ☐ Use One-Key Dialing	Action after Greeting

System ID	Name	Owner
Transfer? ☐ Yes, to Ext. # _____ ☐ No	Greeting ☐ None ☐ Use One-Key Dialing	Action after Greeting

System ID	Name	Owner
Transfer? ☐ Yes, to Ext. # _____ ☐ No	Greeting ☐ None ☐ Use One-Key Dialing	Action after Greeting

System ID	Name	Owner
Transfer? ☐ Yes, to Ext. # _____ ☐ No	Greeting ☐ None ☐ Use One-Key Dialing	Action after Greeting

Transaction Directory

Worksheet 16	**Transaction Boxes**
Page___ of	

Transaction boxes are the building blocks of special applications. They can be used to provide audiotext, one-key menus, special message taking, and special call routing. For each transaction box in your application, fill out a copy of this worksheet.

System ID	Name	Owner

Call Transfer

Transfer the calls reaching this box to an extension?
Day hours ☐ Yes, to extensio ______ ☐ No (default)
Night hours ☐ Yes, to extension ______ ☐ No (default)

Call transfer type ☐ Await Answer for ___ rings(default) (3 rings or more) ☐ Release ☐ Wait for Ringback for ___ rings (3 rings or more)

Transfer options ☐ **A**nnounce ☐ **C**onfirm ☐ **I**ntroduce ☐ **M**essage Screen ☐ **S**creen ☐ None
(Use only with Await Answer call transfer)

Use call holding? ☐ Yes ☐ Vox ☐ No (default)
(Do not use with Release call transfer)

Greeting

Day Greeting ____
Night Greeting ____
Use one-key dialing during greeting? ☐ Yes ☐ No (default)

1 = __________	2 = __________	3 = __________	4 = __________	5 = __________
6 = __________	7 = __________	8 = __________	9 = __________	0 = __________

Action After Greeting

Day	Night	(check one box for Day hours and one box for Night hours)
☐	☐	Say Goodbye then hang up
☐	☐	Transfer the caller to the operator
☐	☐	Restart the call at the opening greeting
☐	☐	Route the call to another subscriber or transaction box (Use Go-to-ID ->)
☐	☐	Interview the caller (Use Go-to-ID→ $PM)
☐	☐	Take a message

If taking message:
Maximum Message Length _____ seconds Allow caller to edit message? ☐ Yes (default) ☐ No
Mark the messages urgent? ☐ Yes ☐ No (default) ☐ Ask
Action after message? ____

Transaction Directory

Worksheet
17

Interview Boxes

Page___ of ___

Interview boxes allow you to ask specific questions of callers. All the responses of a caller are joined together in a single message, that is sent to the owner of the interview box. For each interview box in your application, fill out a copy of this worksheet. Enter the questions to be asked the caller and the maximum time allowed for the caller answer.

Box Name

Owner

System ID

Question	**Max. Response** (in seconds)
1. ______	______
2. ______	______
3. ______	______
4. ______	______
5. ______	______
6. ______	______
7. ______	______
8. ______	______
9. ______	______
10. ______	______
11. ______	______
12. ______	______
13. ______	______
14. ______	______
15. ______	______
16. ______	______
17. ______	______
18. ______	______
19. ______	______
20. ______	______

Should outside callers be allowed to mark messages urgent? ☐ Yes ☐ No (default) ☐ Ask

Action after last question

☐ Say goodbye then hang up
☐ Transfer the call to the operator
☐ Restart the call.
☐ Route the call to another subscriber or transaction box (Use Go-to-ID →_____)
☐ Hang up (The system does not say anything after the last question.)

Transaction Directory

NEC

EliteMail VMS/
EliteMail Limited

JOB SPECIFICATIONS MANUAL

NEC America, Inc.

Issue 1