COMDIAL®

Interchange
Supervisor's User Guide

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-Notice-
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Interchange	Software versions 11.1 and greater

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1. SYSTEM SUPERVISOR OVERVIEW

Once the installing technician sets up the Interchange system at a site, an on site system supervisor must be appointed to perform day-to-day system maintenance tasks. This manual defines the tasks that you, the System Supervisor, may need to perform. It also provides information about how to complete each task.

Before you attempt to perform any system supervisor functions, you must be familiar with the basic capabilities and structure of the Interchange system.

1.1 What Does Interchange Do?

In its simplest form, Interchange acts like a telephone receptionist. It answers incoming calls and transfers them to the appropriate extension. If the called extension is not available (busy or no answer), Interchange offers to take a message or try an alternative extension.

Interchange functionality includes:

- Automated attendant features
- Voice mail features

These two functions work together to provide smooth call coverage at an Interchange site.

1.1.1 WHAT IS AN AUTOMATED ATTENDANT?

The automated attendant features perform the tasks of a live attendant.

Live Attendant	Interchange Automated Attendant
Answers an incoming call by lifting telephone.	Answers an incoming call by going "off-hook."
Greets the caller with a phrase such as, *"Welcome to [XYZ Company]."*	Greets the caller by playing a pre-recorded greeting such as, *"Welcome to [XYZ Company]."*
Asks to whom the caller wishes to speak.	Plays a pre-recorded greeting that prompts the caller to either: • dial the extension of the party they are trying to reach, or • choose from a list of voiced options.
Listens to the caller's response.	Listens to the digits dialed by the caller.
Says, "Please hold."	Plays a pre-recorded phrase, *"Please hold..."*
Calls the required extension by hook-flashing and dialing the extension number.	Calls the required extension by hook-flashing and dialing the extension number.
Listens for busy tone, ring tone, answer, etc.	Listens for busy tone, ring tone, answer, etc.
If the extension is busy, offers to let the caller hold. If the extension does not answer, offers to take a message or try another extension.	If the extension is busy, plays a pre-recorded prompt offering the option to hold. If the extension does not answer, plays a pre-recorded prompt offering to take a message or try another extension.

1.1.2 WHAT IS VOICE MAIL?

The term *voice mail* refers to systems that can record a voice message and treat it like a mail message.

In a typical office environment, the live attendant takes a message from a caller and writes it down on a piece of paper. The attendant then places the slip in the recipient's in-box or *mailbox*. The box owner then retrieves and reads the message placed in the box.

In contrast, the Interchange records a message from a caller and places it in a voice mailbox. The mailbox owner can later retrieve the message by calling into the system and listening to the recording. The following table compares how Interchange processes voice messages compared to a live attendant.

Live Attendant	Interchange Voice Mail
Attendant listens as the callers dictates their messages, writing it down on a piece of paper.	Interchange records the message as the caller speaks.
Attendant places the message slip in a mailbox belonging to the recipient.	Interchange stores the voice message electronically in the recipient's voice mailbox.
Attendant dials the code to turn on message waiting lamp on the recipient's telephone.	Interchange dials the code to turn on the message waiting lamp on the recipient's telephone.
Recipient sees the message waiting lamp is on, and retrieves message slips from the message mailbox.	Recipient sees the message waiting lamp is on and dials Interchange to retrieve messages.
Recipient reads messages left on message slips.	Interchange plays messages recorded by callers in the voice mailbox.

Interchange is designed using the Box concept. A box contains a set of instructions that tells the program what to do with a call it is handling. By sending calls to different boxes created on the system, the system effectively processes calls—including playing certain prompts or greetings to callers, collecting information and messages from callers, and routing calls to certain extensions based on digits dialed by callers.

When you use the automated attendant capabilities in Interchange, the system uses routing boxes to answer incoming calls, play a listing of options to callers, and route each call to a specific mailbox (or another type of box on the system) based on either digits dialed by the caller, or on other criteria the technician defined when the system was set up. The mailboxes transfer calls to their associated extensions and store messages for system mailbox owners. Each mailbox can also be set up to forward calls to another phone or extension number, deliver messages to another phone or pager, play one of 10 pre-recorded greetings to callers, screen calls, queue calls when the extension is busy, or record call conversations.

In addition to routing boxes and mailboxes, the Interchange provides several other types of boxes:

- Question box
- Directory box
- Account Number box
- Group box
- Customer Service box.

This document discusses how you can make modifications to mailboxes and routing boxes, which are the two most commonly used box types. Because the other types of boxes are used in conjunction with more intricate system setups, adjusting their functionality is best left to a certified Interchange technician. Therefore, if you need to adjust the operation of any boxes other than mailboxes or routing boxes, contact your Interchange technician.

1.2 Understanding Supervisor Responsibilities

You can perform most administrative functions over the telephone, by simply calling into the system and logging into a supervisor mailbox. Other functions, however, must be performed from the Interchange PC because they require you to make adjustments to fields on Interchange program screens.

1.2.1 CREATING, MODIFYING, AND DELETING MAILBOX OWNER MAILBOXES

All employees are assigned a mailbox in the system. They can use Interchange to record voice mail messages in a mailbox, or to forward calls to other phones or extension numbers. As employees join and leave the company, you must create or delete their associated mailboxes. If employees' need to access certain system features changes, you may need to modify their mailboxes. You must also modify mailboxes when employees want to change numbers the system uses with its message delivery and pager notification features.

While you can perform most modifications by calling into the system over the telephone, certain modifications require you to use the Interchange PC (such as modifying the second through fifth phone or pager numbers for message delivery).

1.2.2 CREATING AND MAINTAINING GROUP DISTRIBUTION LISTS

Group distribution lists provide mailbox owners an easy way to send one message they record to multiple individuals, without specifying each individual recipient's extension. Though mailbox owners can set up one to four personal distribution lists specific to their needs, many organizations also set up group distribution lists that can be used by all company employees. A group list a company maintains

may contain, for example, the names of all company employees, of all employees in a particular department, of all employees that work a specified shift, etc. You must update these group distribution lists as employees join or leave your organization.

You must create and maintain group distribution lists using the Interchange PC (you cannot call into the system over the telephone to create/modify them).

1.2.3 ISSUING BROADCAST MESSAGES

The broadcast message feature allows you to easily distribute informational messages to all mailboxes on the system. Only a system supervisor has access to this feature.

You must issue broadcast messages by calling into the system over the telephone.

1.2.4 DISABLING PORTS AND RE-ENABLING PORTS

Should a telephone line or port be malfunctioning, the Interchange system technician may ask you to disable the line until it can be serviced.

You can only disable ports by calling into the system over the telephone.

1.2.5 TEMPORARILY FORCING THE SYSTEM INTO DAY, LUNCH, OR NIGHT SERVICE MODE

Interchange can be set up to play different greetings and to process calls differently according to the time of day each call is received. Three different modes can be set up on the system: Day Service, Lunch Service, and Night Service. Each service mode is assigned a specific time segment of the day. Calls received within a mode's time segment are routed to a particular box, which plays a particular greeting. Many systems, for instance, have calls route to a different

box that plays an Office Closed greeting during the Night Service hours. Occasionally you may need to force Interchange to temporarily process calls according to a service mode that is other than the current mode (to extend the Lunch hour mode for example).

You can only temporarily change the service mode by calling into the system over the telephone.

1.2.6 CHANGING DESIGNATED COMPANY BUSINESS HOURS

You may need to permanently change the hours associated with the Day Service, Lunch Service, and Night Service modes. If, for example, your company extends its business hours from 5:00 PM to 6:00 PM during a particular time of the year, you may need to extend the Day Service hours (during which the system routes calls to a box that plays an Office Open greeting) to last until 6:00 PM.

To permanently adjust the business hours you must use the Interchange PC to access the Business Hours screen.

1.2.7 CHANGING DESIGNATED COMPANY HOLIDAYS

Up to 20 holiday dates can be defined on the system. On each holiday, calls can be routed to a special Routing box, in which you can record a specific holiday greeting. From time to time, especially from year to year, you may need to add, modify, or delete specified holiday dates.

You must use the Interchange PC to modify the holiday dates. (You can record holiday greetings over the telephone, however.)

1.2.8 CHANGING THE GREETING PLAYED BY A ROUTING BOX

When a call comes into Interchange, it is processed by a routing box, which plays a greeting to the caller and may offer the caller options on how the call can proceed (*"Press 2 for Sales,"* for example). You may need to modify the greeting played by a particular routing box. For example, you may want to customize the greeting played by the routing box that answers calls on a particular holiday. Or, you may need to add or eliminate a routing option voiced to callers (such as, *"Press 5 for Customer Service"*).

You may use either the Interchange PC to modify the holiday dates or you can call in over the telephone.

1.2.9 CHANGING THE ROUTING IN A ROUTING BOX

At times you may need to add or eliminate a routing option available to callers (such as, *"Press 5 for Customer Service"*). Or, you may need to modify the box to which the call is routed when callers select the option (you may want to send the call to mailbox 399 instead of 395, for example). Remember that when you change single-digit key routing, you must also change the greeting voiced by the routing box (as described in Section 1.2.8, *Changing the Greeting Played by a Routing Box*).

You may use either the Interchange PC to modify single-digit call routing or you can call in over the telephone. However, you can only modify the routing technique (routing based on day of week, call sequence, etc.), through the screen interface.

1.2.10 CONTROLLING MAILBOX OWNER ACCESS TO SYSTEM FEATURES

You can modify the features to which a group of mailbox owners is permitted access by modifying the class of service assigned to the mailbox owners. Making class of service modifications allows you to also prevent the system from dialing certain phone numbers, such as long distance numbers, when making outgoing calls from a mailbox owner's mailbox. Outgoing calls may be made by the system to deliver messages to a mailbox owner, page a mailbox owner, or to have the system place an outgoing call (when the mailbox owner calls into the mailbox and selects this option).

You must use the Interchange PC to adjust the Class of Service screen.

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2. USING THE TELEPHONE TO PERFORM SUPERVISOR FUNCTIONS

To access system supervisor functions by calling into the system, you must log into a supervisor mailbox. A supervisor mailbox is any mailbox that has been assigned supervisor privileges in the mailbox's assigned class of service. (The mailbox's assigned class of service defines the features and options to which the mailbox owner is permitted access.) Consult with the technician who installed the Interchange system for a list of which mailboxes have been assigned supervisor privileges.

To log into a supervisor mailbox from the telephone, and access supervisor functions, perform the following steps.

1. From a telephone, call into voice mail and log into a supervisor mailbox. The system voices the Main Menu:

   "To listen to your messages press 1. To send a message press 2. To change your options press 3."

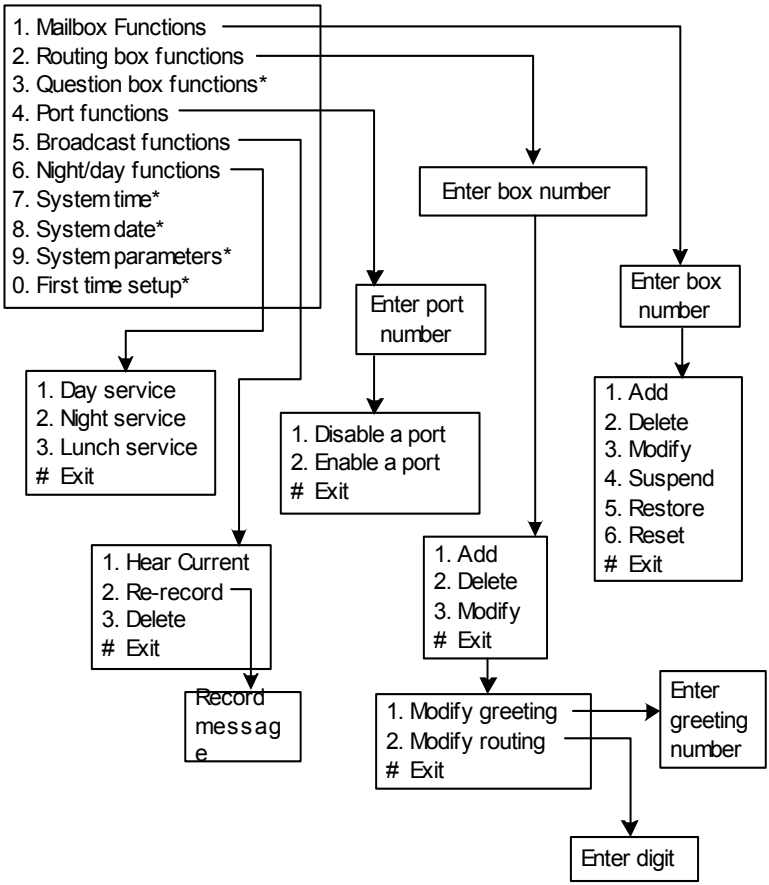
2. To access the Supervisor menu, press 6 (the system does not voice this option).

   Next, the system voices the Supervisor menu options:

Supervisor Menu	
For Mailbox Administration	Press 1
For Routing box Administration	Press 2
For Question box Administration	Press 3
For Port Administration	Press 4
To Change the System Broadcast Message	Press 5
To Change the voice mail Day / Night Service	Press 6
To Change the System Time	Press 7
To Change the System Date	Press 8
To Modify System Parameters	Press 9
To Perform First Time Setup	Press 0
To Exit	Press #

The following illustration shows the structure of the Supervisor menus.

Figure 2-1 Structure of Supervisor Menus



***CAUTION:** Select and modify these options ONLY under the guidance of your system technician. Using these options incorrectly may keep the system from effectively processing calls and performing messaging functions. This guide does not include information on w orking w ith these options.

2.1 Creating, Changing, or Deleting a Mailbox

You can create, modify, or delete a mailbox using options on the Mailbox Administration menu. Specifically, you can use this menu to:

- add or delete a mailbox,
- change a mailbox greeting (the mailbox owner can also perform this function by logging into the mailbox),
- change a mailbox password (the mailbox owner can also perform this function by logging into the mailbox),
- change the call transfer, pager, and message notification numbers (the mailbox owner can also perform this function by logging into the mailbox), or
- suspend a mailbox (making it inaccessible to the mailbox owner) and restore access to a suspended mailbox.

To create, modify, or delete a mailbox over the telephone, perform the following steps.

1. From the Supervisors menu, press *1* for Mailbox Administration.
2. When prompted, enter the number of the mailbox you want to add, modify, or delete. The system repeats the number back to you.

3. When prompted, press *1* to confirm the number or press # if the number you entered was incorrect. Once you confirm, the system tells you the Mailbox menu options:

Mailbox Menu	
To Add	Press 1
To Delete	Press 2
To Modify	Press 3
To Suspend	Press 4
To Restore	Press 5
To Reset	Press 6
To Exit	Press #

4. To add a new the mailbox to the system, press *1*. The system adds the new mailbox to the mailbox database. All default settings in the mailbox are set to the default parameters settings specified in prototype mailbox 9994. The default password for the mailbox is the same as the mailbox number.
5. To delete the mailbox from the system, press *2*. The system deletes the mailbox from the mailbox database.

6. To modify the mailbox on the system, press *3*. The system tells you the Options Menu choices.

Options Menu	
To Record your Name	Press 1
To Record your Greeting	Press 2
To Change your Password	Press 3
To Change your Call-Transfer feature	Press 4
To Change your Message Notification feature	Press 5
To Change your Pager feature	Press 6
To Review msgs scheduled for Future Delivery	Press 7
To Change your Personal Distribution Lists	Press 8
To Retrieve a Message Previously Sent	Press *
To Return to the Main Menu	Press #

7. To record the mailbox owner's name, press *1*. *Note: Each mailbox owner can also log into the mailbox and complete this task—this does not need to be performed by a system supervisor.*

   Once you record the name, the system speaks the following prompts:

To Replay	Press 1
To Re-record	Press 2
To Delete	Press 3
To Exit	Press #

   Follow the prompts to complete the procedure.

8. To record a personal greeting for the mailbox, press *2*. You can record up to ten personal greetings for the mailbox (numbered 0 through 9). *Note: Each mailbox owner can also log into the mailbox and complete this task—this does not need to be performed by a system supervisor.*

Once you record a greeting, the system gives you the following options:

To Replay the Greeting	Press 1
To Re-record the Greeting	Press 2
To Delete the Greeting	Press 3
To Choose a New Greeting	Press 5
To Exit	Press #

Follow the prompts to complete the procedure.

9. To change the mailbox password, press *3*. Note that to change the password, you must first enter the current password when prompted by the system. By default, the mailbox password is the same as the mailbox number. *Note: Each mailbox owner can log into the mailbox and complete this task—this does not need to be performed by a system supervisor.*

   Once you enter a new mailbox password and confirm the entry as prompted, the system tells you that the new password will be in effect the next time the mailbox is accessed.

10. To change the call transfer feature, press *4*. *Note: Each mailbox owner can also log into the mailbox and complete this task—this does not need to be performed by a system supervisor.*

    The system tells you the current call transfer set up, then gives you options:

Press 1 if you would like to change the number
Press * to turn this feature on or off, or
Press # if you are satisfied

    Follow the prompts to complete the procedure.

11. To change the message notification feature, press *5*. *Note: Each mailbox owner can also log into the mailbox and complete this task—this does not need to be performed by a system supervisor.*

The system identifies the current message notification setup, then tells you the notification options:

Press 1 if you would like to change the number
Press * to turn this feature on or off, or
Press # if you are satisfied

Follow the prompts to complete the procedure.

12. To change the pager feature, press *6*. *Note: Each mailbox owner can also log into the mailbox and complete this task—this does not need to be performed by a system supervisor.*

    The system voices a prompt identifying the current pager set up, then voices the paging options:

Press 1 if you would like to change the number
Press * to turn this feature on or off, or
Press # if you are satisfied

    Follow the prompts to complete the procedure.

13. To review messages scheduled for future delivery, press *7*. *Note: Each mailbox owner can also log into the mailbox and complete this task—this does not need to be performed by a system supervisor.*

    The system identifies any message scheduled for future delivery, then lists your options:

To Listen to the Message	Press 1
To Hear the Next Message (scheduled for future delivery)	Press 2
To Cancel the Message	Press 4
To Exit	Press #

    Follow the prompts to complete the procedure.

2.2 Creating a Broadcast Message

A broadcast message is heard by all mailbox owners when they open their mailboxes. The broadcast message can only be recorded by a mailbox owner with supervisor privileges. This type of message is different from any other message in the system in the following ways:

- The broadcast message does not activate any mailbox notification services (message waiting lamps, pagers, etc.).
- The mailbox owner's new and old message counts are not affected by a broadcast message.
- The broadcast message is sent to all mailboxes. It is not possible to select which mailboxes are to receive the broadcast message.

Once you record a broadcast message, the system plays it to all mailbox owners the next time they open their mailboxes. The system plays the message only one time to mailbox owners. The next time owners log in to their mailboxes, the system does not repeat the broadcast message.

Note:If you record a broadcast message, each new mailbox that you later create will receive that broadcast message. To prevent newly created mailboxes from receiving a currently recorded broadcast message, you must first delete the broadcast message before creating the new mailboxes.

To issue a broadcast message perform the following steps.

1. From the Supervisors menu, press *5* for System Broadcast Message. The system voices the following options.

To Hear the Current Broadcast Message	Press 1
To Re-record the Broadcast Message	Press 2
To Delete the Broadcast Message	Press 3
To Exit	Press #

2. To record a broadcast message, press *2*. Follow the prompts to complete the procedure.

2.3 Disabling or Re-Enabling a Port

If you want to prevent Interchange from answering calls on one or more of its ports (usually because the port is not functioning properly), you can disable the port(s) over the telephone. If you want to later re-enable a port that you previously disabled, you can also perform this function by calling into the system.

To disable or re-enable a port perform the following steps.

1. From the Supervisors menu, press *4* for Port Administration.
2. When prompted, enter the number of the line with which you want to work.
3. When prompted, press *1* to confirm the number you entered or press # if the number you entered was incorrect. Once you press *1* to confirm, the system tells you the port administration options.

To Disable a Port	Press 1
To Enable a Port	Press 2
To Exit	Press #

4. To shut down a port, press *1* to disable it. If you disable a port, all calls using that port are immediately terminated.
5. To enable a port that is currently shut down, press *2*.

2.4 Temporarily Forcing the System into Day, Lunch, or Night Service Mode

You can override the regular Day Service, Lunch Service, or Night Service mode by forcing Interchange into another mode. The system switches to the new service mode and remains in that mode until the next scheduled mode change. For example, assume that Day Service mode runs from 8:00 AM until 5:00 PM, and Lunch Service mode runs from noon until 1:00 PM. If you call in at 9:00 AM (the system is in Day Service mode) and force the system into Night Service mode, the system remains in Night Service mode until noon. It then automatically switches to Lunch Service mode.

To force Interchange into Day Service, Lunch Service, or Night Service mode, perform the following steps.

1. From the Supervisors menu, press *6* for Day / Night service. The system gives you the following options.

To Change to Day Service Mode	Press 1
To Change to Night Service Mode	Press 2
To Change to Lunch Service Mode	Press 3
To Exit	Press #

2. Press a number to indicate the mode in which you want the system to temporarily operate. Follow the prompts to complete the procedure.

2.5 Changing the Greeting Played by a Routing Box

Understanding the Routing Box Setup and Routing Box Greetings

By default, Interchange is pre-configured with 3 routing boxes to process calls. Routing box 800 answers calls during office open business hours (Day Service), box 801 answers calls after Day Service hours, and box 821 routes calls after they have already passed through box 800 or 801.

The Interchange technician who set up the system can familiarize you with modifications that were made to this routing box structure, including additional routing boxes that were created.

Up to 10 different greetings can be recorded and stored in each routing box. The following chart is provided for you to note routing box greetings set up on your system.

Box	Greeting Number	Greeting

Box	Greeting Number	Greeting

To record routing box greetings or change currently active greetings, perform the following steps.

1. From the Supervisors menu, press *2* for routing box administration.
2. When prompted, enter the number of the routing box you want to add, modify, or delete. The system repeats the number back to you.
3. When prompted, press *1* to confirm the number you entered or press # if the number you entered was incorrect. Once you confirm, the system tells you the routing box administration menu options.

Routing Box Menu	
To Add	Press 1
To Delete	Press 2
To Modify	Press 3
To Exit	Press #

4. To record a greeting for the routing box, press *3*. The system lists the Options menu.

Options Menu	
To Record your Name	Press 1
To Record your Greeting	Press 2
To Change your Password	Press 3
To Change your Call-Transfer feature	Press 4

Options Menu	
To Change your Message Notification feature	Press 5
To Change your Pager feature	Press 6
To Review msgs scheduled for Future Delivery	Press 7
To Change your Personal Distribution Lists	Press 8
To Retrieve a Message Previously Sent	Press *
To Return to the Main Menu	Press #

5. From the Options menu, press *2*.
6. When prompted, enter the number of the routing box whose greeting you want to create or change.
7. When prompted, press *1* to confirm the number you entered or press # if the number you entered was incorrect. Once you press *1* to confirm, the system gives you options that relate to the currently active greeting.

To Replay the Greeting	Press 1
To Re-record the Greeting	Press 2
To Delete the Greeting	Press 3
To Choose a New Greeting	Press 5
To Exit	Press #

8. If you want to re-record the greeting, first press *1* to replay it. By replaying the greeting, you can:
   - be sure you are re-recording the greeting you intended to modify, and
   - note all the call routing options that are currently provided in the greeting, so you can make sure the same routing options are available in the new greeting (for example, *"...Press 2 for Sales..."*). If you need to change the call routing options (single-digit), see Section 2.6, *Changing the Single-Digit Call Routing in a Routing Box*.

Next, to re-record the greeting, press *2*. The system prompts you to enter the number of the greeting you want to re-record. Enter the greeting number (0 through 9). Then, follow the prompts to complete the procedure.

9. To choose a new greeting to play as the currently active greeting, press *5*. The system prompts you to enter the number of the greeting you would like to activate or to press star for the currently active greeting. If you press *, the system plays the currently active greeting number and greeting, and then repeats the current options.

To Replay the Greeting	Press 1
To Re-record the Greeting	Press 2
To Delete the Greeting	Press 3
To Choose a New Greeting	Press 5
To Exit	Press #

Once you press *5* and enter a new greeting number, the system confirms the greeting number and plays the now-active greeting.

2.6 Changing the Single-Digit Call Routing in a Routing Box

Interchange can be set up to play greetings to callers that include single-digit call routing options, such as, *"Press 2 for Sales…"* In this setup, a call is transferred to a specific mailbox when the caller presses *2* during or after the greeting. You can control the digits callers can dial, and the path their calls subsequently take using the following procedure.

Note: If you change the single-digit call routing set up, you must also update the routing box greeting to relay new instructions to the caller. See Section 2.5, Changing the Greeting Played by a Routing Box to update the greeting as necessary.

1. From the Supervisors menu, press *2* for routing box administration.
2. When prompted, enter the number of the routing box you want to add, modify, or delete. The system repeats the number back to you.
3. When prompted, press *1* to confirm the number you entered or press # if the number you entered was incorrect. Once you confirm, the system tells you the routing box administration menu options.

Routing Box Menu	
To Add	Press 1
To Delete	Press 2
To Modify	Press 3
To Exit	Press #

4. To make modifications to the routing box, press *3*. The system lists your options.

To Change the Greeting	Press 1
To Change the Routing	Press 2
To Exit	Press #

5. To change the routing structure, press *2*. The system prompts, *"For digits zero through nine, please enter the digit, or press * for special routing options."*
6. Press the digit for which you want to modify the call routing. The system identifies the current call routing set up for the digit.
7. When prompted, press *1* to change the routing for the digit. Then, when prompted, enter the number of the box to which you now want callers who press the digit to route. The system states the new call routing structure.

Note that you can make special call routing refinements by pressing * in step 2. The system announces the following special routing options.

To change the destination for the star digit	Press *
To change the destination for the pound digit	Press #
To change the No Digits Destination	Press 1
To change the Invalid Digit Destination	Press 2
To change the Voice Detected Destination	Press 3

CAUTION

Once you access this menu, DO NOT press # to exit it, since the # key invokes a change to the destination for the pound key. If you want to return to the previous menu, simply make no entry when you hear the special routing options prompt.

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3. USING THE PC TO PERFORM SUPERVISOR FUNCTIONS

To access program screens on which you can perform supervisor functions, you must log onto the Interchange PC using the Administrator password. The technician who installed the system can provide this password to you.

CAUTION

It is critical that you do not modify any field on any screen or any file on the system unless you are directed to by this guide or by the Interchange System Technician.

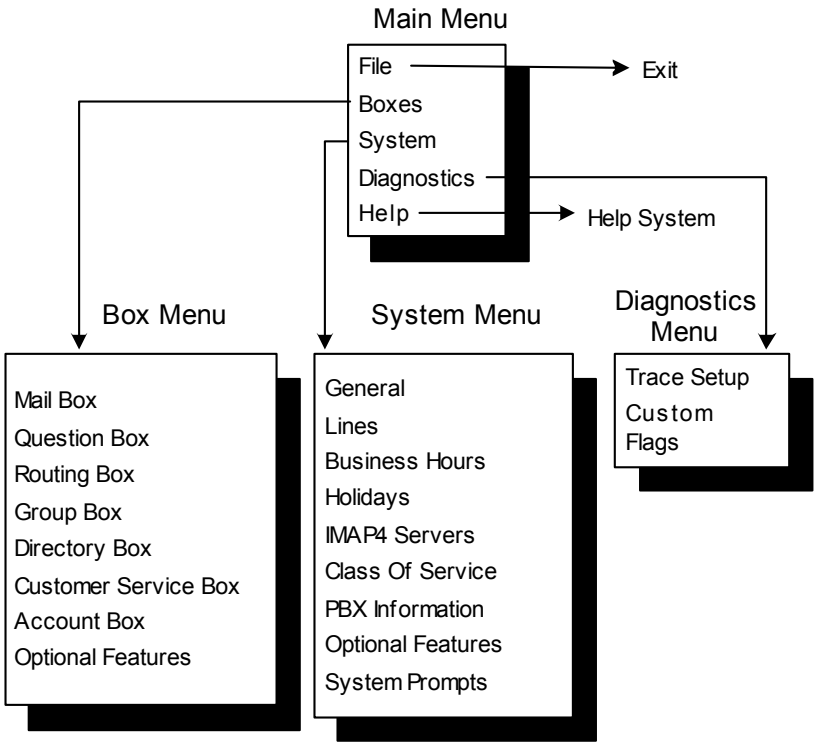
Incorrect modifications you make may impair the system's ability to perform call processing and messaging functions.

To access Interchange screens perform the following steps.

1. From the Windows desktop, double-click the Database Administrator icon. The system prompts you to enter a password.
2. Type the Administrator password then press *Enter* to log on to the system. The Main screen displays.

Figure 4-1 shows the structure of the Interchange system menus. Note that depending on the type of system installed and the password you entered to log on, you may or may not have access to all menus and options.

Figure 4-1 Interchange System Menus



3.1 Creating, Changing, or Deleting a Mailbox

You can make intricate technical modifications to the mailbox using the PC that you cannot make through the telephone interface. This guide includes instructions on making entries in fields that do not require an in-depth knowledge of the system. Before making changes to fields other than those documented here, contact your Interchange System Technician.

To create, modify, or delete a mailbox through the Interchange system screens, perform the following steps.

1. From the Main screen, click on the *Boxes* pull-down menu.
2. Select *Mailbox* from the Boxes menu.
3. Click on the *New* button at the top of the screen to create a new box. When prompted, enter the number of the box you want to create. The system makes a copy of prototype mailbox 9994 and displays the new box.

   To modify or delete an existing box, click on the *Select* button and click on the box number from the drop down list. The system then displays the specified box.

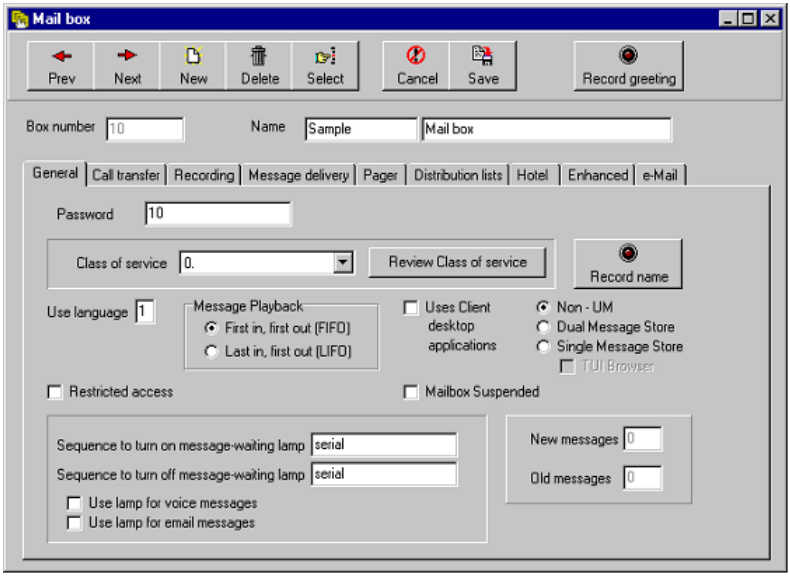
   To delete a box, first make sure you are viewing the box you want to delete. Then click on the *Delete* button. When the system prompts you to confirm the deletion, click on Yes.

   For further details on how to change the setups for a specific mailbox, see Section 3.1.1, *Setting up Call Transfers* through Section 3.1.9, *Setting up e-Mail Features*.

   You can also use the system's help file at any time by pressing *F1*.
4. When you have made necessary modifications, click on *Save* to save your changes.

The Mailbox screen allows you to control the settings for each individual mailbox on the system.

Figure 4-2 Mailbox Screen, General Tab



The **Box number** field shows the mailbox whose setups you are currently viewing. Every box has its own unique box number, which can range from 1 to 9899. You cannot edit this field. To view a different mailbox, press *Prev (*previous mailbox), or *Next* (next mailbox). If you want to add a new mailbox, press *New* (add).

The box number is the number an outside caller dials to reach the mailbox owner. The system looks inside the mailbox specified for the owner's extension number and transfers the call to that number. The mailbox number can be the same as its owner's extension number, or it can be different. For example, an arbitrary range of mailbox numbers 5100 through 5109 can transfer calls to extensions 20 through 29.

HINT

For setup and system maintenance ease, create mailboxes with numbers that match the extensions to which they transfer calls.

The **Name** (first) field contains the first name of the individual to which the mailbox is assigned. Interchange uses this name for record-keeping, and it appears on the database listing.

Prior to initiating a transfer, in standard operation the system plays the system prompt *"Please hold while I transfer your call to [name],"* inserting the called party's name.

If you insert the **@** symbol before the name in this field (*@Mary*), the recorded name is substituted with the system prompt *"that extension."*

If you insert the & symbol before the first name (*&Mary*), the system does not play either the name or "*that extension*."

The **Name** (last) field contains the last name of the individual to which the mailbox is assigned. Interchange uses the last name in conjunction with the Directory box feature. It also appears on the database listing.

The mailbox is not included in the system directory Interchange provides to callers if you inset the **@** symbol before the first letter of the last name (*@Jones*). (Interchange also does not include the mailbox in the system directory if the name prompt has not been recorded for the mailbox.)

When mailbox owners try to open their mailboxes to retrieve messages, the system asks for a password. Enter this password in the **Password** field. It can be up to 10 digits long, and can consist of the digits 0 through 9 and the character *. For security reasons, it is recommended that box owners use passwords at least 4 characters long, and that they change them regularly.

If you set the password to *0000* (four zeros), Interchange allows access to the mailbox without asking for a password.

CAUTION

Use this feature with caution, as it can allow unauthorized access to a mailbox.

If you enclose the password in brackets [ ], it cannot be changed remotely over the telephone.

The **Record Name** button indicates whether mailbox owners have recorded their own names. The system indicates an existing recording by a displaying a red light on the button.

The system uses the mailbox owner's name in the following instances.

- When the system initiates a transfer:
  "Please hold while I transfer your call to [name]."
- When the called party is busy:
  "[Name] is busy. You are number [number] in line."
- When the called party does not answer and there is no personal greeting recorded:
  "[Name] is not available right now. If you would like to leave a message press 1."
- When the system calls owners to deliver their new messages (message notification):
  "Message for [name]. Press 1 if you would like to hear your messages."

- When another mailbox owner uses the send message feature to send a message to this box. The system plays the name for this box and asks for confirmation:
  "[Name]—if this is correct, press 1."
- When callers use the directory feature. The system plays each name that matches the letters entered by the caller.
  "[Name]—if this is the person you want, press 1."
- When mailbox owners open their mailboxes.
  "[Name]—You have [number] new messages."

***Note**:If there is no name recorded for the mailbox, the system does not include the mailbox in the system directory and uses "that extension" instead of the name in various phrases.*

You can record the name by clicking on the *Record Name* button, then using the controls on the Sound Recorder dialog box. At the lower right of the dialog, click on the red circle button to begin recording. Click on the rectangle button (to the left of the circle button) to end the recording.

This **Class of Service** field allows you to assign a class of service to the current mailbox. A class of service is a set of privileges that are assigned to the mailbox owner. There are 32 classes of service available, numbered 0 through 31. You can view and modify the available classes of service by clicking on the **Review Class of Service** button.

For example, suppose you use class of service 7 for supervisor privileges. You would assign this class of service only to mailboxes whose owners are to be provided access to the supervisor menu functions. Suppose you assign class of service 1 to mailboxes that are issued to temporary employees. As such, you could set up class of service to provide its mailboxes with access to only one personal greeting and no other additional privileges. Suppose you assign class of service 3 to most "average" employees. You could set up this class of service to provide its mailboxes access to a certain set of features, such as call queuing and P.A. call announce capabilities. And, you

could assign class of service 4 to company executives. This class of service could provide all the features allowed for the "average" employee, plus additional features pertaining to immediate access and high amounts of travel, such as Find Me Follow Me.

The **Use Language** field indicates the language that callers hear when a call is routed to this mailbox via direct in dial. This entry is required, since the direct-in-dial digits are received before the system is able to ask callers which language they want to use. Consult your Interchange System Technician for information on completing this field.

The **Message Playback** field allows you to specify the order in which messages are played to the mailbox owner. The options available include the following.

Option	Order of Playback
First In First Out FIFO	Any urgent messages are played first (oldest first), then any non-urgent messages are played (oldest first).
Last In First Out LIFO	Any urgent messages are played first (newest first), then any non-urgent messages are played (newest first).

The **Uses Client desktop applications** field indicates whether the mailbox owner is permitted to use the VCM feature, the Mailbox Administration/Call Control feature, and/or the Unified Messaging feature. ***Note:*** *These client desktop applications are available as optional add-on features to Interchange. Access to these features is sold on a per-dedicated-seat license. Do not exceed the licensing by activating these features for more boxes than are licensed.* *Interchange will monitor system usage to ensure licensing requirements for each desktop application are not exceeded. If they are, Interchange will de-activate feature access to mailboxes exceeding licensing limits.*

Though you can check the *Uses Client desktop applications* field on as many user mailbox setup screens as you like, the system will not permit access to the feature by more users than the number of licenses purchased with the system. If, for example, a 5-seat unified messaging license was purchased with the system, only 5 users can have the unified messaging feature running with their desktop Inbox at one time. Similarly, access to the e-mail reader feature is sold on a by-port license. If a 2-port license is purchased, for example, up to 2 users can access use the e-mail reader feature to hear their e-mail over the telephone at one time.

The **Mailbox Suspended** field tells you whether this mailbox is currently in a lock-out state. Interchange suspends a mailbox when a caller has tried to log in three times unsuccessfully because of a password failure. This is a safeguard to prevent unauthorized access to a mailbox. The suspension can last from 0 to 7 days (the default is 30 minutes). If mailbox owners are reporting they are locked out of their mailboxes, you can check if the system has suspended the mailbox by looking at this field. If the mailbox is currently suspended, the system displays a checkmark here. You can reinstate the mailbox by removing the checkbox.

The **Non-UM**, **Dual Message Store**, and **Single Message Store** fields indicate whether the mailbox owner is permitted to use the unified messaging feature, and if so, how the mailbox owner's voice mail and faxmail messages are to be stored.

- Non-UM

  The mailbox owner is not permitted to use the unified messaging feature.

- Dual Message Store

  The mailbox owner's voice mail and fax mail messages are stored on the Interchange system PC and the client PC. The mailbox owner can access these voice mail and fax mail messages, along with e-mail messages, from a Microsoft Outlook e-mail inbox application. The system unified messaging client software must be properly configured on the mailbox owner's client PC.

- Single Message Store/TUI Browser option

  The mailbox owner's voice mail and fax mail messages are copied and sent to an e-mail address. These messages are accessible, along with e-mail messages the mailbox owner receives, from any client PC e-mail inbox application.
  Note: *You must also complete the e-Mail tab and the System IMAP4 Configuration screen for this option to work. See Section 3.1.9, Setting up e-Mail Features further details.*

Consult your Interchange Technician if you have any questions about how to complete these fields.

If a valid mailbox number is entered into the **Restricted Access** field, the mailbox can receive messages only from other mailbox owners. Also, a restricted mailbox can send messages only to its host mailbox, which is the mailbox number entered in the **client of Mailbox** field. The restricted mailbox cannot perform any other mailbox functions.

The **Sequence to Turn on/off Message-Waiting Lamp** fields indicate the sequence of digits the system uses to turn on/off the message-waiting lamp at the extension associated with this mailbox. Consult your Interchange System Technician for information on the entry that must be made in this field.

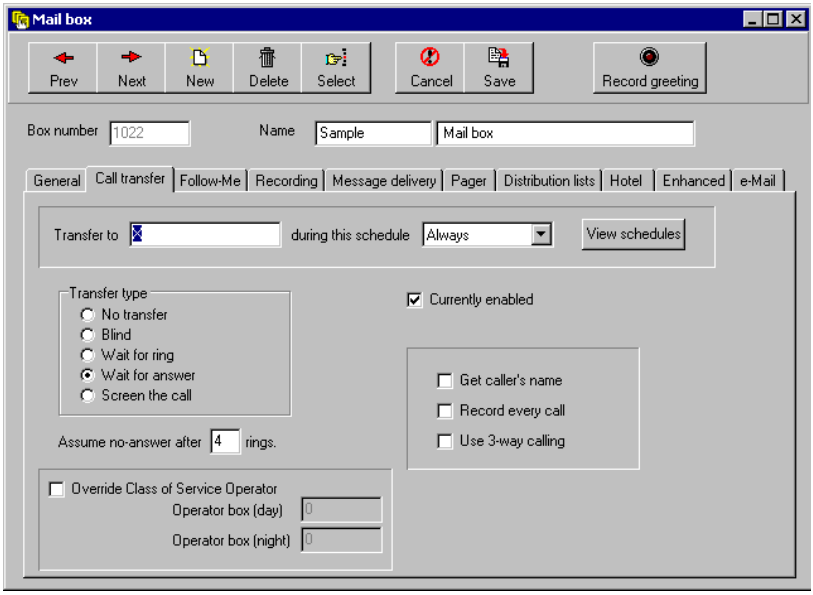
The **New Messages** field indicates the number of new messages in the mailbox, and is a read-only field (you cannot change it). A message is *new* if the mailbox owner has not yet listened to it. Once the owner has listened to the message, it becomes an old message. A mailbox can hold a maximum of 200 messages.

The **Old Messages** field indicates the number of old messages in the mailbox, and is a read-only field (you cannot change it). Once the owner has listened to and/or saved a message, it becomes an *old* message. A mailbox can hold a maximum of 200 messages.

3.1.1 SETTING UP CALL TRANSFERS

Interchange provides you with the capability to set up call transfers per mailbox owner. To do so, access the Mailbox screen for the mailbox owner's mailbox number. Then click on the Call transfer tab.

Figure 4-3 Mailbox Screen, Call Transfer Tab



The **Transfer to** field contains the number to which Interchange transfers incoming calls from the auto attendant menu (in most cases, this is the extension number). If mailbox owners are working in a different location, they can specify another extension number or an external phone number instead of their office extensions.

Mailbox owners can also call in and remotely change the number in this field (unless you enclose the number in brackets). After logging into a mailbox and selecting the Options menu, they are prompted, *"To change your call transfer feature, press 4."*

Valid entries for this field are 0 through 9, *, #, and ten special characters:

P pulse (rotary) dialing,
T tone dialing (default),
, (comma) short pause,
% medium pause (= 4 commas),
L long pause (= 8 commas),
! hook-flash,
\F long hook-flash,
N no progress tones (must be last character),
[] no call in change capability (enclose number inside brackets),
{} specify line group (enclose line group inside brackets).

Interchange ignores all other characters, so you can use them for punctuation. *Note*: *To dial an external number, you must enter an E as the first character and then the phone number.*

The **during this schedule** field allows you to specify when calls are transferred for the mailbox. ***Note**: If the mailbox transfer type is set to* No transfer *or if the* Currently enabled? *field is unchecked, the system does not transfer calls no matter what you enter in this field (instead it plays the greeting and takes a message)*.

The schedule options are as follows.

Schedule	Result
Always	Calls to this mailbox are transferred at all times.
Day service	Calls are transferred only during Day Service, as defined in the *Business Hours* screen.
Night service	Calls are transferred only during Night Service, as defined in the *Business Hours* screen.
SCHEDULE A, B, C, or D	Calls are transferred only during the schedule, as defined by pressing the *View Schedules* button.

When the system routes a call to the mailbox, it transfers the call to the number specified in the *Transfer to:* field. Interchange offers several transfer options in the **Transfer type** field.

- *No transfer*—Interchange does not transfer the call. It plays the personal greeting immediately (instead of attempting to transfer the call and then playing the greeting). ***Note****: If you select this option, Interchange will not ring the mailbox owner's extension for incoming calls. Interchange also turns off the Find Me Follow Me (FMFM) mode.*
- *Blind*—Interchange transfers the call by dialing the number, then dropping out of the call. Interchange does not wait to determine if there is an answer, if the line is busy, etc. before releasing the call. The caller will hear the busy signal, or ring no answer, or will be routed to the messaging solution for that number. For example, mailbox owners could use this option if they want all their calls to end up at their cell phone or home phone (and routed to their cell phone mailbox or home answering machine) instead of their Interchange mailbox. *Note: If you select this option, Interchange stops the FMFM mode after dialing this number on mailbox owners' lists.*
- *Wait for answer*—Interchange transfers the call by dialing the number, and monitoring the line. If Interchange detects an answer, it performs a blind transfer and drops out of the call. If the receiving line is busy or does not answer, Interchange pulls the call back and attempts the next valid number on the FMFM call list (if enabled). If there are no other valid numbers on the FMFM call list, Interchange offers options to the caller (hold, leave message, call another extension, etc.).

- *Screen the call*—Interchange transfers the call by dialing the number, and monitoring the line. If the mailbox owner answers, it gives the owner the following screening options.

Screening Options	
Press	**To**
1	accept the call
2	play the currently active greeting
3	transfer this caller to the number in the *Follow me only when the caller requests to* field
4	select one of the personal greetings (number 0-9)
5	enter an extension number where mailbox owners want Interchange to transfer the caller
6	accept the call. Interchange remains connected and records the conversation as a message in the mailbox owner's mailbox.

  If the receiving line is busy or does not answer, Interchange pulls the call back and attempts the next valid number the FMFM call list (if enabled). If there are no other valid numbers on the FMFM call list, Interchange offers options to the caller (hold, leave message, call another extension, etc.).

- *Wait for ring*—Interchange transfers the call by dialing the number and monitoring the line. If Interchange detects a ring, it releases the call. If Interchange detects a busy signal, it pulls the call back and attempts the next valid number on the FMFM call list (if enabled). If there are no other valid numbers on the call list, Interchange offers options to the caller (hold, leave message, call another extension, etc.). For example, mailbox owners may use this option when they want all their calls to end up at their cell phone or home phone (and routed to their cell phone mailbox or home answering machine instead of their Interchange mailbox) AND they want Interchange to make sure the line is not busy before releasing the call.

Use the **Currently Enabled** field to turn the call transfer service on or off. Mailbox owners can also call in and remotely change their call transfer setup. If you check this field, the system transfers calls to the specified number. If you do not check this field, the system does not transfer calls, but takes messages instead.

If you check the **Get caller's name** field, the system prompts callers for their names before transferring calls (if the callers do not speak a name, the system transfers the call anyway). If the transfer type is set to *Screen the call*, when the called party answers, the system prompts:

"I have a call from [caller's name] for [mailbox owner's name]. Press 1 to take the call, press 2 if you would like me to take a message..."

If the transfer type is set to *Wait for answer*, when the called party answers, the system simply announces the caller's name and connects the call.

If you check the **Record every call** field, the system remains on the line after completing the transfer and records the conversation. The system then stores the recorded conversation as a message in the mailbox.

The **Use 3-way calling** field allows three-way calling for this mailbox. Three-way calling is simply a conference call involving three parties, where one of the parties is an Interchange mailbox. If your system is connected directly to a residential (R1) line, a single business (B1) line, or multiple business lines assigned to a multi-line hunt group, it is likely that the call transfer service is not available. If it is available, do not use three-way calling. When in doubt, consult your Interchange System Technician for information on completing this field.

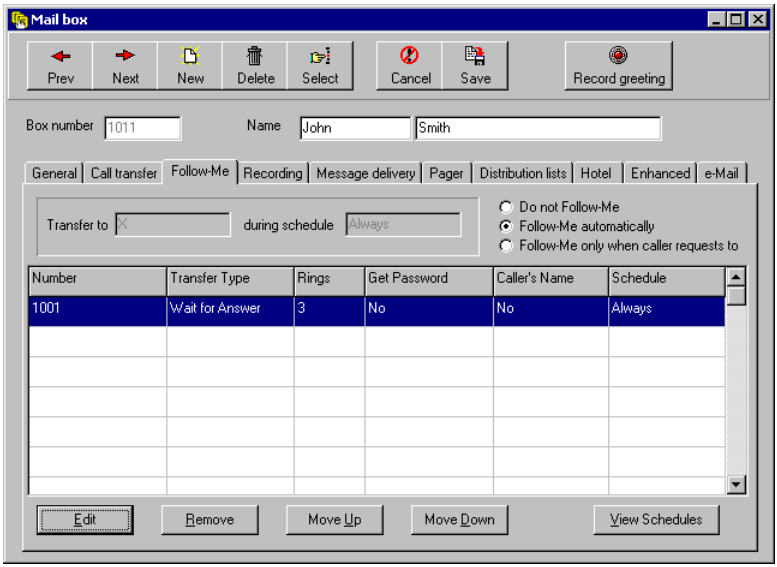
If the transfer type is *Wait for answer* or *Screen the call*, the **Assume no-answer after *X* rings** field tells Interchange how long to wait for the called party to answer before abandoning the transfer. ***Note**: Units indicated are rings, except in certain integrations when the units are in seconds.*

When enabled, the **Override Class of Service Operator** field overrides the operator designated by the mailbox's class of service, allowing you to specify an operator on a mailbox by mailbox basis. To designate an operator other than the operator specified by the mailbox class of service, enter the alternate operator's extension number in **Operator Box**.

3.1.2 SETTING UP FOLLOW ME MODE

Interchange allows you to control the Find Me Follow Me (FMFM) feature, per mailbox owner. To do so, access the Mailbox screen for the mailbox owner's mailbox number. Then click on the Follow-Me tab.

Figure 4-4 Mailbox Screen, Follow Me Tab



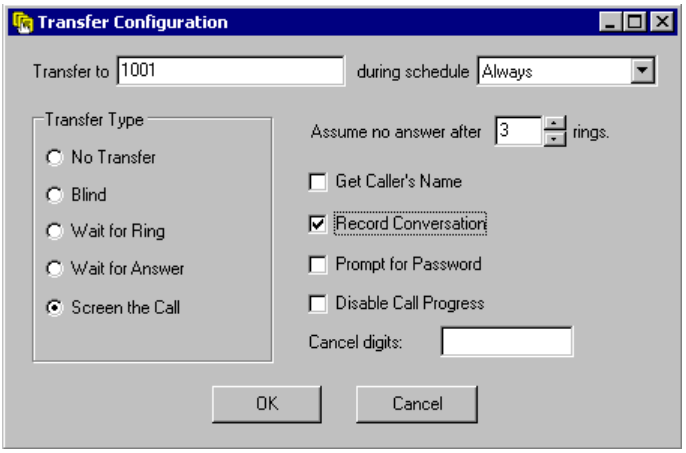
The **Transfer to** and **during this schedule** fields show the current transfer information already set up via the Call transfer tab.

First, select when you want Interchange to forward the mailbox owner's calls to another location. Available options include:

- **Do not Follow Me**—turns FMFM mode off.
- **Follow me automatically**—when a specified number of rings go unanswered on the mailbox owner's extension. The number of rings is set in the *Assume no-answer after X rings* field on the Transfer Configuration screen.
- **Follow me only when caller requests to**—when the caller presses 4 while listening to the personal message. This option allows mailbox owners to transfer only those calls most important to them, such as ones from a boss, co-worker, etc. They can choose to tell the person beforehand that they will have the FMFM mode on (and how to activate it by pressing 4 during the personal greeting), or mailbox owners can add the instructions to their active personal greeting. If owners do not include the instructions in their active personal greeting, all other callers will not know that the FMFM mode is on, will not press 4, and so will be sent to owners' voice mail if they are unable to take the call.

Next, you will set up the first transfer Interchange is to make when FMFM is enabled. Select the first row of the table, and click on the **Edit** button. The Transfer Configuration screen appears.

Figure 4-5 Transfer Configuration Screen



In the **Transfer to** field, enter the number for the call transfer. If mailbox owners are working in a different location, they can specify another extension number or an external phone number instead of their office extensions.

Mailbox owners can also call in and remotely change the number in this field (unless you enclose the number in brackets). Valid entries for this field are 0 through 9, *, #, and ten special characters:

P pulse (rotary) dialing,
T tone dialing (default),
, (comma) short pause,
% medium pause (= 4 commas),
L long pause (= 8 commas),
! hook-flash,
\F long hook-flash,
N no progress tones (must be last character),
[] no call in change capability (enclose number inside brackets),
{} specify line group (enclose line group inside brackets).

Interchange ignores all other characters, so you can use them for punctuation. *Note*: *To dial an external number, you must enter an E as the first character and then the phone number.*

In the **during this schedule** field, select the schedule during which you want Interchange to forward the incoming call. Available options include:

- Always—calls transferred at all times.
- Day Service—calls transferred only during day service, which is your company's normal business hours. You define these times on the Schedules page.
- Night Service—calls transferred only during night service, which is your company's normal evenings hours. You define these times on the Schedules page.
- Schedules A through D—calls transferred only during certain time periods, such as early morning, lunch, afternoons, etc. You define these times on the Schedules page.

In the **Transfer type** field, select how you want the call processed:

- *No transfer*—Interchange does not transfer the call. It plays your personal greeting immediately (instead of attempting to transfer the call and then playing the greeting). If you select this option, you are turning off the FMFM mode.
- *Blind*—Interchange transfers the call by dialing the number, then dropping out of the call. If you select this option, Interchange stops the FMFM mode after dialing the this number on your list. Interchange does not wait to determine if you answer, the line is busy, etc. before releasing the call. The caller will hear the busy signal, or ring no answer, or will be routed to the messaging solution for that number. For example, use this option if you want all your calls to end up at your cell phone or home phone (and routed to your cell phone mailbox or home answering machine) instead of your Interchange mailbox.
- *Wait for answer*—Interchange transfers the call by dialing the number, and monitoring the line. If Interchange detects an answer, it performs a blind transfer and drops out of the call. If the receiving line is busy or does not answer, Interchange pulls

the call back and attempts the next valid number on your FMFM call list. If there are no other valid numbers on your call list, Interchange offers options to the caller (hold, leave message, call another extension, etc.).

- *Screen the call*—Interchange transfers the call by dialing the number, and monitoring the line. If you answer, it plays a system prompt giving you six screening options (Press 1 to accept the call, Press 2 to play currently active greeting, Press 3 to transfer this caller to the number in the *Follow me only when the caller requests to* field [on the Follow-Me tab], Press 4 to play a personal greeting [number 0-9], Press 5 to enter an extension number to which Interchange will transfer the caller., or Press 6 to accept the call. Interchange remains connected and records the conversation as a message in the mailbox.). If the receiving line is busy or does not answer, Interchange pulls the call back and attempts the next valid number on your FMFM call list. If there are no other valid numbers on your call list, Interchange offers options to the caller (hold, leave message, call another extension, etc.).
- *Wait for ring*—Interchange transfers the call by dialing the number and monitoring the line. If Interchange detects a ring, it releases the call. If Interchange detects a busy signal, it pulls the call back and attempts the next valid number on your FMFM call list. If there are no other valid numbers on your call list, Interchange offers options to the caller (hold, leave message, call another extension, etc.). For example, use this option if you want all the calls to end up at the mailbox owners cell phone or home phone (and routed to their cell phone mailbox or home answering machine instead of their Interchange mailbox) AND you want Interchange to make sure the line is not busy before releasing the call.

In the **Assume no-answer after *X* rings** field, enter the number of rings you want to allow before Interchange considers the attempted transfer a no answer. The *Follow me mode* field and the *Wait for Answer* and *Screen the Call* options on the Transfer type field use this number.

If you selected *Screen the Call* or *Wait for Answer* as the type of transfer, you can enter further instructions for the transfer in the *Get Caller's Name, Record Conversation, Prompt for Password, Disable Call Progress*, and *Cancel digits* fields. *Note: If you selected* No Transfer, Blind*, or* Wait for Ring *as the transfer type, Interchange does not let you select any of these other fields.*

The **Get caller's name** field is used for *Wait for Answer* and *Screen the Call* transfer types only. If you set this field on (checked), Interchange asks callers for their name and then announces the name to you before connecting the call.

The **Record Conversation** field is used for *Wait for Answer* and *Screen the Call* transfer types only. If you set this field on (checked), Interchange remains on the line after completing the transfer, records the conversation, and stores it as a message the mailbox owner's mailbox.

The **Prompt for Password** field is used for *Screen the Call* transfer types only. If you set this field on (checked), Interchange prompts mailbox owners to enter their mailbox password before transferring the call.

The **Disable Call Progress** field is used for *Screen the Call* transfer types only. If you set this field on (checked), Interchange does not try to detect call progress tones (i.e., ringing) after dialing the FMFM number. Select this option if the FMFM number Interchange must call has unusual ringing patterns that the system may not recognize. Otherwise, if Interchange does not effectively detect ringing, it will not wait for an answer to connect the caller to the number, and will proceed instead with attempting to dial the next Follow Me number entered on the screen.

The **Cancel digits** field is used for *Screen the Call* transfer types only. If you enter a string of numbers in this field, Interchange sends the DTMF tones for those digits to the calling number if the system does not detect a keypress response after playing the screening options. These cancel digits prevent the calling number from recording a message of Interchange's voice prompts.

Use this field if, for example, mailbox owners want to avoid a blank message in their cell phone mailbox. Enter the appropriate stop message code in this field. Once Interchange detects no response to the screening options, it sends out the DTMF tones to their cell phone number (which stops their cell phone mailbox from recording a message), and then pulls the call back to continue on with the Follow Me mode. If you do not know the DTMF code for stopping a message recording in the cell phone mailbox, have the mailbox owner contact their cell phone service provider.

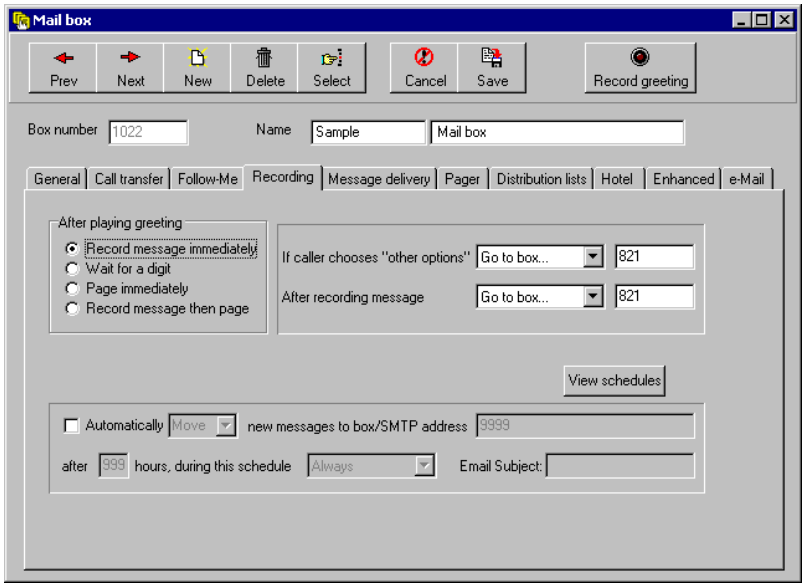
Next, set up any additional transfers you want Interchange to attempt when FMFM is enabled (up a maximum of ten transfers). In the subsequent rows of the table, complete the fields in the same manner as for the first transfer. Interchange will attempt each transfer in the order you set them up on the Transfer page, and based on whatever schedule you associate with any given number. If Interchange cannot reach the mailbox owner at any of the alternate numbers (no answer), Interchange will return the caller to the owner's personal mailbox and instruct the caller to leave a message.

N*ote: Mailbox owners can only use the FMFM feature if you permit them to use it. If FMFM is allowed for an owner's class of service, owners can change their FMFM settings at will using the Personal Administration Tool or using the phone menus. If you want to turn off FMFM for a specific mailbox owner, change the owner's class of service to one that does not allow FMFM. If you do not change the class of service, and only check the* Do not Follow Me *field, the mailbox owner will still have access to the FMFM settings and can turn FMFM back on.*

3.1.3 SETTING UP RECORDING

Interchange allows you to set up the recording options per mailbox owner. To do so, access the Mailbox screen for the mailbox owner's mailbox number. Then click on the Recording tab.

Figure 4-6 Mailbox Screen, Recording Tab



The **After Playing Greeting** area shows the options available to the caller after the system plays the mailbox owner's greeting. When callers have been routed to a mailbox and are listening to the greeting, they *always* have various options available by dialing the appropriate digit. If the caller does *not* dial a digit by the time the system finishes playing the greeting, the system immediately takes whatever action is specified in this field. If the caller *does* dial a valid digit from the available options, his/her selection overrides the action entered in this field.

If you select the **Record Immediately** option, the system plays the prompt, *"Please speak after the tone,"* and records the caller's message. ***Note**: If the caller hangs up while the system is playing the mailbox greeting, the system might begin recording a message before it detects that the call has ended. When this happens, the mailbox ends up containing a short, blank message. You can eliminate these false messages by selecting the Wait for a Digit option rather than Record Immediately.*

If you check the **Wait for a digit** field, the system gives the caller more time to enter a digit. Use this option only when the mailbox owner, in the personal greeting, instructs the caller to choose an option. If the caller does not enter a digit, the system then takes whatever action is specified in the After Leaving Message field. If the caller hangs up while the system is playing the mailbox greeting, the system might begin recording a message before it detects that the call has ended. When this happens, the mailbox ends up containing a short, blank message. You can eliminate these false messages by selecting the Wait for a Digit option rather than Record Immediately.

If you select the **Page Immediately** field, the system looks at what type of pager this mailbox is using. If the Pager Type field is set to *None* or the Pager Number field is blank, the system takes whatever action is specified in the After Recording Message field.

If the Pager Type field is set to *Tone*, the system takes a message and calls the mailbox owner's pager.

If the Pager Type field is set to *Display/Digital,* the system asks the caller to enter his/her own telephone number then calls the mailbox owner's pager and relays that number (no message is taken). ***Note**: If the Pager Type field is set to Display/Digital and the Pager notification service is currently turned off (either manually or due to the call schedule), callers hear the system prompt, "I'm sorry, I am unable to page that party right now," and continues the call by taking whatever action is specified in the After Recording Message field.*

If you select the **Record message then page** option, the system looks at what type of pager this mailbox is using. If the Pager Type field is set to *None* or the Pager Number field is blank, the system records a message, but does not activate the pager.

If the Pager Type field is set to *Tone*, the system takes a message and calls the mailbox owner's pager.

If the Pager Type field is set to *Display/Digital,* the system records a message, then calls the pager. It sends the mailbox number to the pager display.

The **If caller chooses "other options"** field gives callers more options, if they press 3 during the mailbox greeting. These other options include the following.

Option	Action Indicated
Go to box	Allows the call to route to another box. The new box number is entered in the next field to the right. This box is usually a routing box containing a greeting or menu, or it is the mailbox number of an individual taking calls for this mailbox owner.
Say goodbye	The system says, "*Good-bye,*" and hangs up.
Return	The system goes back to the previous box that handled this call (usually a routing box).
Hang up	The system immediately terminates the call by going on-hook.

The **After Recording Message** field gives callers more options after they record a message. These other options include the following.

Option	Action Indicated
Go to box	Allows the call to route to another box. The new box number is entered in the next field to the right. This box is usually a routing box containing a greeting or menu, or it is the mailbox number of an individual taking calls for this mailbox owner.

Option	Action Indicated
Say goodbye	The system says, "*Good-bye,*" and hangs up.
Return	The system goes back to the previous box that handled this call (usually a routing box).
Hang up	The system immediately terminates the call by going on-hook.

The system follows the action specified here when:

- Callers have recorded their message, pressed # for further options, and pressed *1* to send or *4* to cancel the message.
- The After Playing Greeting field is set to *Wait for digit*, and the caller did not enter a digit.
- The After Playing Greeting field is set for a paging option, but the pager's Enabled field is set to *No* (in this case, the caller first hears the system prompt, *"I am not able to page that party right now."*).

If a message has been in a mailbox for the number of hours specified in the **Automatically *X* new messages to box/SMTP address *X* after *X* hours, during this schedule** field and has not yet been listened to by the owner, the system forwards/moves/copies the message to another mailbox or to a group box. To disable the auto-forward/move/copy feature, leave this field blank. ***Note****: If you have this field set to forward, the system automatically deletes the original copy from the original mailbox. When a mailbox receives a message that the system has auto-forwarded, the system informs the mailbox owner by saying, "This message was automatically forwarded from [name of original recipient]."*

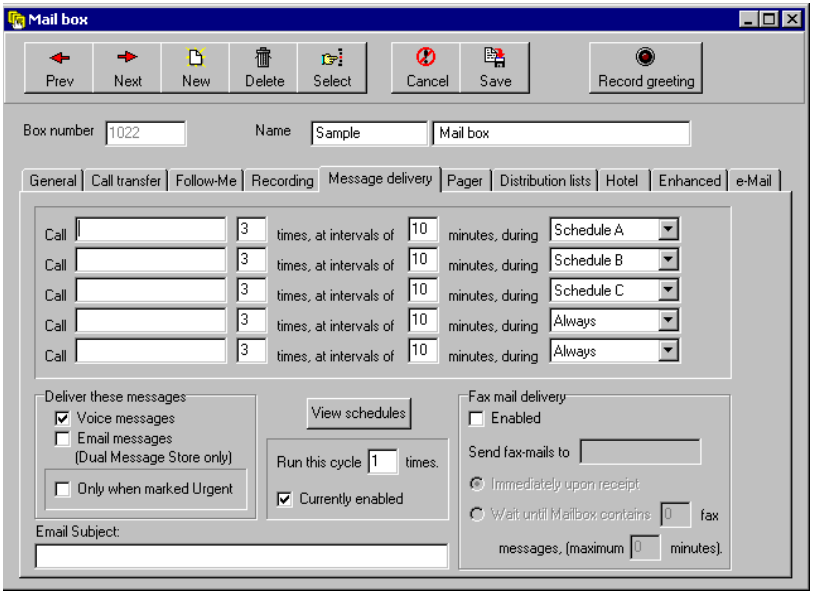
You can specify when you want the system to automatically forward/move/copy new messages. Your options include the following.

Schedule	Result
Always	Automatically forward/move/copy is available at all times.
Day service	Automatically forward/move/copy is available only during Day Service, as defined on the *Business Hours* screen.
Night service	Automatically forward/move/copy is available only during Night Service, as defined on the *Business Hours* screen.
Schedule A, B, C, or D	Automatically forward/move/copy is available only during the schedule, as defined on the *View Schedules* button.

3.1.4 SETTING UP MESSAGE DELIVERY

Interchange allows you to set up the message delivery options per mailbox owner. To do so, access the Mailbox screen for the mailbox owner's mailbox number. Then click on the Message delivery tab. *Note: You must have the* Currently Enabled *box checked on the Transfer Tab if you want to use message delivery. If you do not check that box, the system ignores whatever settings you enter on this screen.*

Figure 4-7 Mailbox Screen, Message Delivery Tab



In the **Call** field, enter the telephone number you want Interchange to call to inform the mailbox owners that there are new message in their mailboxes. This field can contain the DTMF digits 0-9, the characters * and #, and other special characters. Consult your Interchange System Technician for information on completing this field.

The owner of a mailbox can call in and remotely change only the first *Call* number, and cannot indicate special characters.

The ***X* times** field indicates the number of successful attempts that the system is to make to each telephone number. A successful attempt is generally defined as one where the system has seized an available line port, dialed the number, and detected ringing. If the attempt is not successful (for example, the called number was busy) the system automatically re-tries every few seconds up to twenty times.

The **At intervals of** field indicates the interval (in minutes) between calls to this number and/or the interval before proceeding to the next call number sequence.

The **during *X*** field indicates when the system is to deliver messages to this number. The options are as follows.

Schedule	Result
Always	Message delivery is available at all times.
Day service	Message delivery is available only during Day Service, as defined on the BUSINESS HOURS screen.
Night service	Message delivery is available only during Night Service, as defined on the BUSINESS HOURS screen.
Schedule A, B, C, or D	Message delivery is available only during the schedule, as defined on the View Schedules button.

The **Run this cycle *X* times** field indicates the number of times the system is to run the message delivery sequence. Once the system calls every number listed, it has run the message delivery sequence one time.

The **Deliver These Messages** field indicates which messages the system is to deliver. Your options include the following.

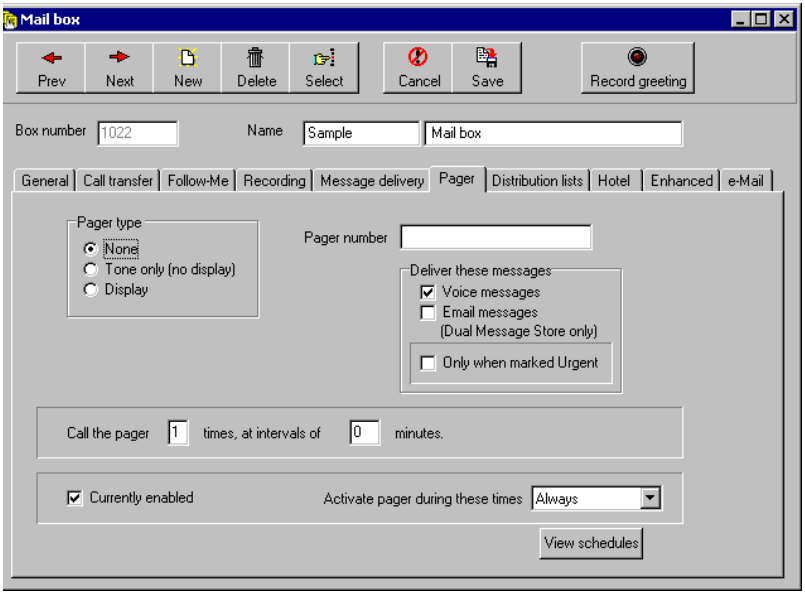
Option	Action Indicated
Voice	The system delivers voice messages received in the mailbox.
e-Mail	The system delivers e-mail messages received in the mailbox via the unified messaging feature.
Only when marked urgent	The system delivers only messages voice mail and/or e-mail messages marked as urgent. Non-urgent messages are not delivered.

A mailbox owner can call in remotely and turn the message delivery feature on or off, or change the first number to be called. The other telephone numbers, if in use, cannot be changed remotely.

3.1.5 SETTING UP PAGER NOTIFICATION

Interchange allows you to set up pager notifications per mailbox owner. To do so, access the Mailbox screen for the mailbox owner's mailbox number. Then click on the Pager tab.

Figure 4-8 Mailbox Screen, Pager Tab



The **Pager type** area allows you to choose what type of pager the mailbox owner has.

When a caller asks the system to page a mailbox owner, the system looks for a free line on which to call the paging service. If no lines are free to make the call, the system queues the request and re-tries every 10 seconds for about 10 minutes.

Enter the telephone number of the paging service in the **Pager Number** field. The mailbox owner may change this number remotely. Normally, access codes for outside lines are not required here. To restrict pager calls to use lines in a particular line group, enter the letter (A, B, C, or D) of the line group in braces { } before the telephone number (for example, {A}5551212). Consult your Interchange System Technician for more information.

You can set up tone or voice pagers in the Message Delivery portion of this screen. Consult your Interchange System Technician for more information.

The pager number can contain the digits 0 through 9 and the characters * and pound #, as well as the several special characters. Consult your Interchange System Technician for more information.

The system calls the pager the number of times indicated in the **Call the pager *X* times** field. This can be useful in circumstances when the pager is turned off for a period or is temporarily out of pager range.

The **At intervals of** field indicates the interval (in minutes) between calls to this number and/or the interval before proceeding to the next call number sequence.

The **Activate pager during these times** field indicates when the system is to deliver pager notification to this number. The options are as follows.

Schedule	Result
Always	Pager notification is available at all times.
Day service	Pager notification is available only during Day Service, as defined on the *Business Hours* screen.
Night service	Pager notification is available only during Night Service, as defined on the *Business Hours* screen.
Schedule A, B, C, or D	Pager notification is available only during the schedule, as defined on the *View Schedules* button.

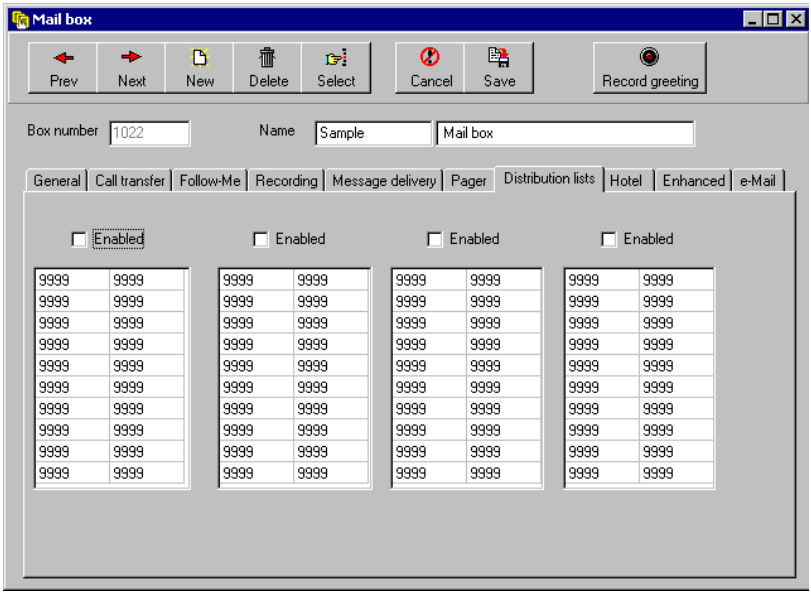
Use the **Currently enabled** field to turn the service on or off from the keyboard. If this field is set checked, the pager feature for this mailbox is currently on. If this field is unchecked, the pager feature is off. Note that the mailbox owner also can call in and remotely turn the pager notification service on or off.

Setting this field off overrides the call schedule set in the previous field.

3.1.6 SETTING UP DISTRIBUTION LISTS

Interchange allows you to set up distribution lists per mailbox owner. To do so, access the Mailbox screen for the mailbox owner's mailbox number. Then click on the Distribution lists tab.

Figure 4-9 Mailbox Screen, Distribution Lists Tab



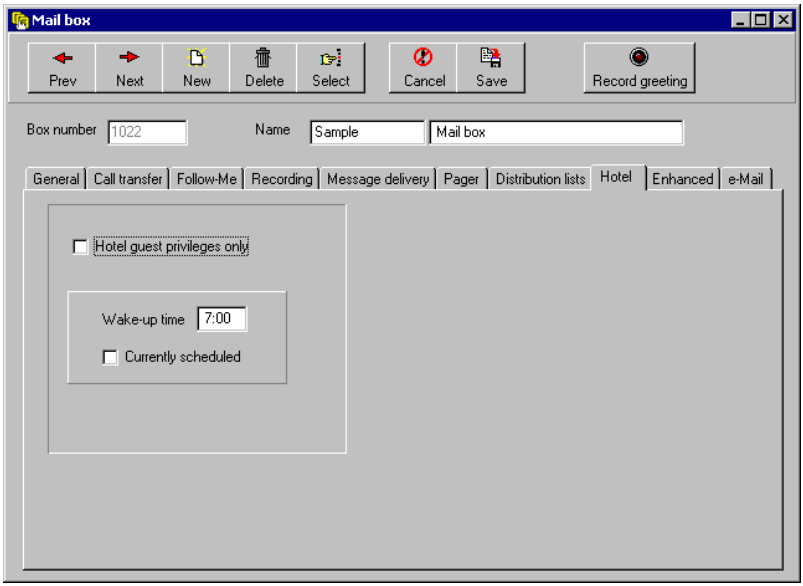
Each mailbox owner can create up to four personal distribution lists, each containing up to 20 mailbox numbers. The **Enabled** field indicates whether the corresponding distribution list below the field is available to the mailbox owner. (If *Enabled* is checked, the list is active for the mailbox owner; if *Enabled* is not checked, the list is not active for the mailbox owner.)

The fields below the Enabled field indicate the mailboxes currently included as part of the distribution list. Only mailboxes can be members of a personal distribution list (you cannot include a group box on the list).

3.1.7 SETTING UP HOTEL FEATURE

Interchange allows you to set up the hotel feature per mailbox owner. To do so, access the Mailbox screen for the mailbox owner's mailbox number. Then click on the Hotel tab.

Figure 4-10 Mailbox Screen, Hotel Tab



If you check the **Hotel guest privileges only** field, the system restricts the options available to the mailbox. When the mailbox owner opens the mailbox, the only options are listening to messages or scheduling a wake-up call.

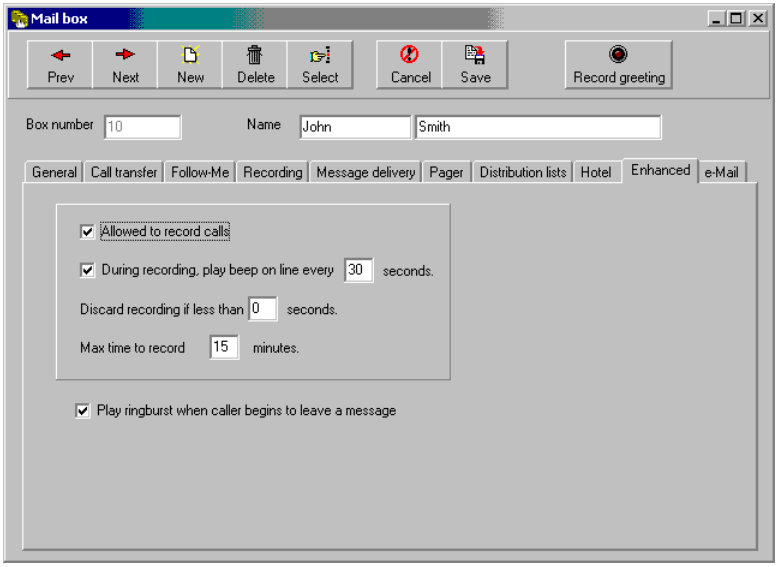
The **Wake-up time** field displays the time the system places a call the extension listed in the Transfer to field. Interchange does not actually place the call at the time specified here unless the wake-up time is currently scheduled. The mailbox owner can also schedule a wake-up call by calling into the system.

If you check the **Currently Scheduled** field, the system calls the extension listed in the Transfer to field, at the time specified in the Wake-up time field.

3.1.8 SETTING UP ENHANCED FEATURES

Interchange allows you to set up enhanced features per mailbox owner. To do so, access the Mailbox screen for the mailbox owner's mailbox number. Then click on the Enhanced tab.

Figure 4-11 Mailbox Screen, Enhanced Tab

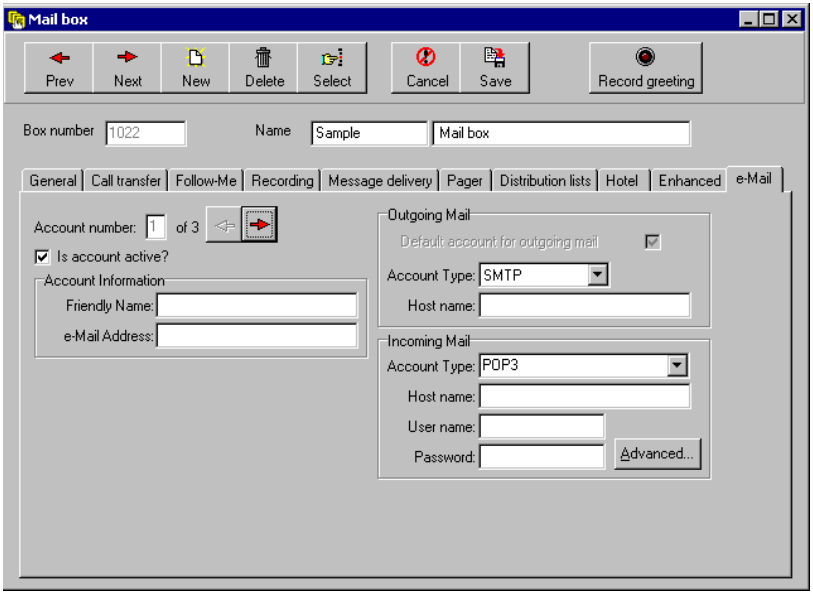


This screen contains fields that are functional only with certain phone systems that provide call recording capabilities. Field entries indicate whether the mailbox owner is permitted to use the record call feature; whether and how often a beep, audible to all conversation participants, is to sound during recordings; the minimum length in seconds a recording must be to be retained on the system; the maximum number of recording minutes allowed per call; and whether, when a caller is prompted to leave a message in the mailbox, a short ringburst is to sound on the mailbox owner's phone. Each recorded call is stored as a new message in the mailbox owner's voice mailbox.

3.1.9 SETTING UP E-MAIL FEATURES

Interchange allows you to set up e-Mail features per mailbox owner. To do so, access the Mailbox screen for the mailbox owner's mailbox number. Then click on the e-Mail tab.

Figure 4-12 Mailbox Screen, e-Mail Tab



If the mailbox owner has more than one e-mail account, the e-Mail tab can include information for up to three different accounts. Once all fields are completed on this screen for the first e-mail account, you can access a second and third e-mail tab to enter information for additional accounts by clicking on the left and right arrow buttons next to the Account number field. ***Note:*** *The e-mail reader will not be able to play e-mail over the telephone for any account that is not set up on the mailbox owner's desktop.*

The **Is account active?** field indicates whether the account that is an active account for the mailbox owner. The e-mail reader will not access voice and e-mails for inactive accounts.

The **Friendly Name** field indicates what name the system uses to display in the From field, on messages recipients receive in their e-mail Inbox from this mailbox owner. Typically, the Friendly Name is simply the mailbox owner's first and last name.

Enter the e-mail address you want the system to use to send the mailbox owner's e-mail messages in the **e-Mail address** field.

The **Default account for outgoing mail field** is active only if more than one e-Mail account is active for this mailbox owner. Check the field on the appropriate e-Mail tab to indicate which account you want the system to use when sending outgoing e-mail.

The **Account type** field in the Outgoing Mail section is used for Unified Messaging and Single Store Messaging; it tells the system what method to use when sending messages to the e-mail server. Your input in this field should correspond to what message store options you chose on the General tab of the Mailbox menu (i.e., non-UM, Dual Message Store, or Single Message Store). Consult your Interchange System Technician if you have any questions about how to complete this field.

The **Host name** field in the Outgoing Mail section indicates the name assigned to the e-mail server that is to be used to send the mailbox owner's outgoing e-mail.

The **Account type** field in the Incoming Mail section is used for Unified Messaging and Single Store Messaging; it tells the system what method to use when communicating with the e-mail server. Your input in this field should correspond to what message store options you chose on the General tab of the Mailbox menu (i.e., non-UM, Dual Message Store, or Single Message Store).

When a mailbox is set up to use Single Message Store, Interchange communicates with e-mail servers via POP3 or IMAP4 technology. When TUI Browser is enabled, the system must use IMAP4 technology. *Note: You will tell the system how to log into the mailbox owner's e-mail account on the e-mail server in the* User name *and* Password *fields.* Although you can select *POP3*, *IMAP4*, or *IMAP4 WITH ADMINISTRATOR ID* from this drop down menu, Comdial

recommends *IMAP4 WITH ADMINISTRATOR ID*. If you select *POP3* or *IMAP4* in this field, you must update the Password field manually each time mailbox owners change their e-mail login passwords. If you do not update it, e-mails can no longer be retrieved for the mailbox owner. To avoid the issues associated with password changes, select *IMAP4 W/ ADMINISTRATOR ID* in this field and set up a user with Administrator login rights on the IMAP4 e-mail server. Consult your Interchange System Technician if you need more information.

The **Host name** field in the Incoming Mail section indicates the name assigned to the e-mail server that receives the mailbox owner's incoming e-mail.

The **User name** field in the Incoming Mail section indicates the user name the mailbox owner uses to log on to the e-mail server that receives the mailbox owner's incoming e-mail.

The **Password** field in the Incoming Mail section indicates the password the mailbox owner uses to log on to the e-mail server that receives the mailbox owner's incoming e-mail.

Note: Alert mailbox owners that if they change their e-mail server access password at any time, you must update it on e-Mail tab. If the password is not up-to-date, mailbox owners attempting a system log in may find that their computer is locked. This occurs because when the Inbox is not up and running on a client PC desktop, the PEC attempts to access e-mails from the e-mail server on the client PC's behalf. It must log on to e-mail server using the password you provide here. If it attempts to log on with the password you enter in this field after this password has been changed by the mailbox owner, after several log in attempts, the server may lock down the client PC.

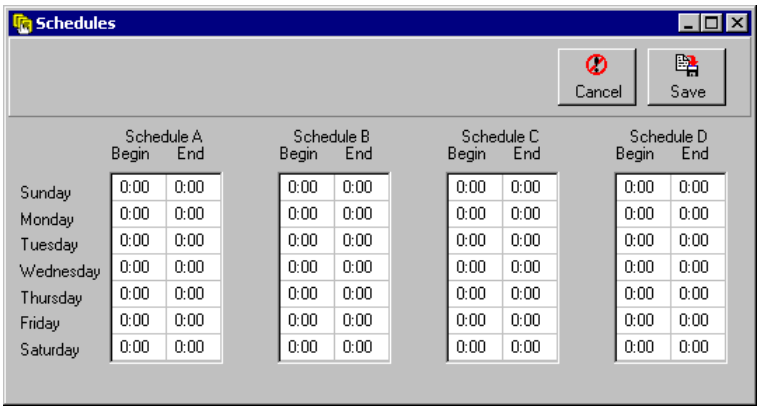
Be particularly aware of this in an Exchange Server environment, since anytime mailbox owners change their network login password in this setting, they must inform you.

If you click on the Advanced button from the e-Mail tab, the system displays the Advanced Properties screen. This screen is only applicable in environments where an Exchange Server e-mail server is used with the Exchange Service. Do not alter the defaults on this screen unless authorized to do so by your Interchange System Technician.

3.1.10 SETTING UP SCHEDULES

Interchange allows you to set up schedules per mailbox owner. These schedules can then be used to allow or disallow certain functions, such as call transfers, pager notifications, message delivery, etc. To set up the schedules, access the Mailbox screen for the mailbox owner's mailbox number. Then click on the **View schedules** button on any of the following tabs: Call transfer, Follow-Me, Recording, Message delivery, or Pager. The system responds by displaying the Schedules screen.

Figure 4-13 Schedules Screen



The four schedules (A, B, C, and D) can be applied to any of five features: call transfer, find-me-follow-me, pager notification, automatic forwarding of new messages, and message delivery. The feature or features assigned to a schedule operate only between the Begin and End times for the days specified.

The **Begin** field indicates the time at which this schedule begins on the day. Time is indicated in 24-hour format (for example, 8:00 PM is specified as 20:00).

The **End** field indicates the time at which this schedule ends on the day. Time is indicated in 24-hour format (for example, 8:00 PM is specified as 20:00).

***Note**:If you want the schedule to be active all day, enter 00:00 for the Begin time and 24:00 for the End time.*

3.2 Controlling Mailbox Owner Access to Features

Each mailbox on the system is assigned a class of service. The class of service assigned to the box dictates which system features the mailbox owners have access to and how they can use those features. To control a mailbox owner's (or a group of mailbox owners') access to certain system features, modify the class of service assigned to the mailbox. (Keep in mind that the class of service modifications you make affect all mailboxes assigned that class of service.)

There are 32 classes of services (0 through 31) that you can set up and then apply to mailboxes on the system. Two of them are pre-configured on the system. Class of service 0 is assigned by default to the prototype mailbox 9994, which serves as a template for every mailbox that you create on the system. Class of service 7 is assigned supervisor mailbox privileges by default.

You can view and change the class of service number assigned to a mailbox by accessing the Mailbox screen for the mailbox. For further details on changing a mailbox setup, see Section 3.1, *Creating, Changing, or Deleting a Mailbox*.

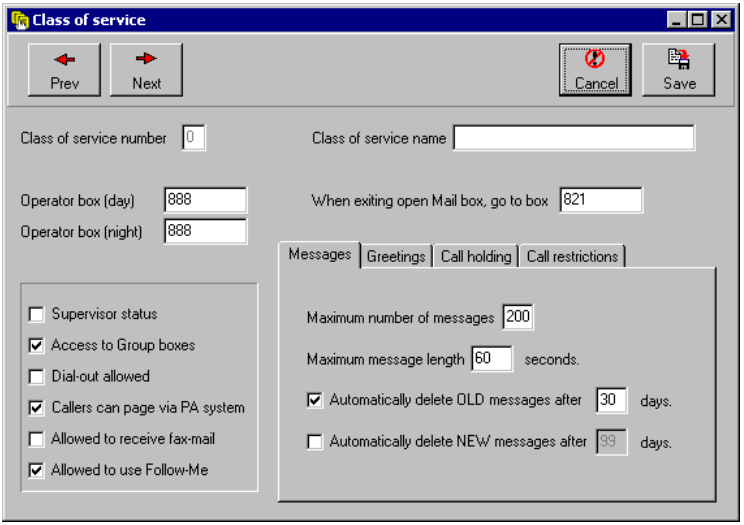
To modify the classes of service, perform the following.

1. From the Main screen, access the System pull-down menu.
2. Select Class of Service from the menu. The class of service screen displays.

3. Make changes to the Class of Service screen to modify classes of service you assign to mailboxes. For further details on how to change the setups for a specific class of service, see Section 3.2.1, *Controlling Messages* through Section 3.2.4, *Restricting Calls*.

   You can also use the system's help file at any time by pressing *F1*.

Figure 4-14 Class of Service Screen



The **Class of service number** field shows the current class of service. To move to the next class of service number, click on *Next*. To move to the previous class of service number, click on *Prev.*

Once you assign a class of service to a mailbox, the mailbox inherits all the privileges and restrictions defined in the class of service.

Use the **Class of service name** field to give the class of service a meaningful name. This helps remind you of the purpose for the class of service. Sample names include *Supervisors, Mailbox Owners,* etc.

When a caller is listening to a mailbox greeting, one of the options is to dial zero to reach an operator. Use the **Operator box (day)** and the **Operator box (night)** fields to tell Interchange where to route the call if the caller dials zero. The default setting is 888.

When mailbox owners have called in to their boxes, have concluded listening to messages, changing options, etc., and have elected to exit from the Main Menu, the **When exiting open Mail box, go to box** field tells the system where to send the call. Retain the default setting in this field as 821.

The **Supervisor status** field defines whether mailboxes belonging to this class of service should have supervisor privileges. A supervisor can perform certain actions not available to regular mailbox owners. For example, a supervisor can add a mailbox or delete a mailbox by calling in from any telephone. The default setting in class of service 0 is no (unchecked), and in class of service 7 is yes (checked).

By setting the **Access to Group boxes** field on (checked), you allow mailbox owners assigned this class of service to access all group boxes set up on the system. If you set the field off (unchecked), the mailbox owners in this class of service will not be able to access any group boxes. The default setting is on.

The **Dial-out allowed** field indicates whether the owner of a mailbox belonging to this class of service is allowed to place outgoing calls from the mailbox. The default setting is off (unchecked).

When a caller is listening to a mailbox owner's greeting, one of the features the system offers is the option to have the call announced over the P.A. system. Use the **Callers can page via PA system** field to allow or deny access to the P.A. feature for callers to mailboxes belonging to this class of service. The default setting is on (checked).

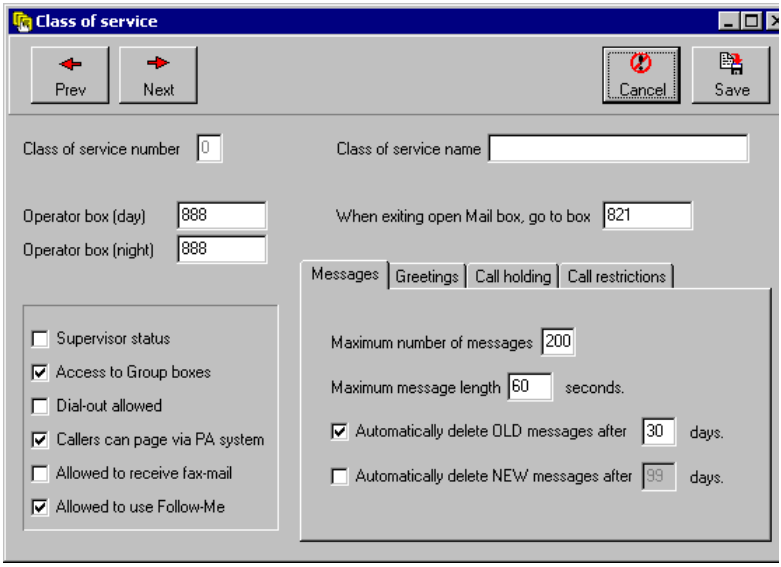
The **Allowed to receive Fax-mail** field applies only if your system has the optional FaxMail module installed. If you want to allow mailboxes in this class of service to receive FaxMail, check this field to turn it on. Make sure it is unchecked if you do not want callers to be able to send fax documents into these mailboxes. The default setting is off (unchecked).

Check the **allowed to use Follow Me** field if you want the mailboxes in this class of service to be allowed to use the Find Me Follow Me feature. Make sure it is unchecked if you want to restrict the Follow Me feature from this class of service. The default setting is off (unchecked).

3.2.1 CONTROLLING MESSAGES

To control how what types of messages are allowed for a particular class of service, access the Class of Service screen for that class of service, and click on the **Messages** tab.

Figure 4-15 Class of Service Screen, Messages Tab



The system can hold up to 250 messages per mailbox. However, you may want to restrict some mailboxes to a lower limit (to conserve disk space). Use the **Maximum number of messages** field to set the maximum number of messages that can be stored in mailboxes assigned this class of service. Once the limit is reached for a particular mailbox, callers attempting to leave more messages in the mailbox are told that the box is full. The default setting is 200.

The value in the **Maximum message length *X* seconds** field defines the maximum length of a message (in seconds) that a caller can leave for mailboxes belonging to this class of service. The default setting is 60 seconds.

The system deletes old messages from mailboxes belonging to this class of service after the number of days you specify in the **Automatically delete OLD messages from system after *X* days** field. An old message is one the mailbox owner has listened to, but has not yet deleted. If you enter *0* in this field, an old message is deleted at midnight on the day the message became old. If you enter *1* in this field, an old message is deleted at midnight on the day following the day the message became old.

To disable deletion of old messages, enter *99* in this field. However, do this with caution, since accumulating messages may create disk storage problems. The default setting is 30.

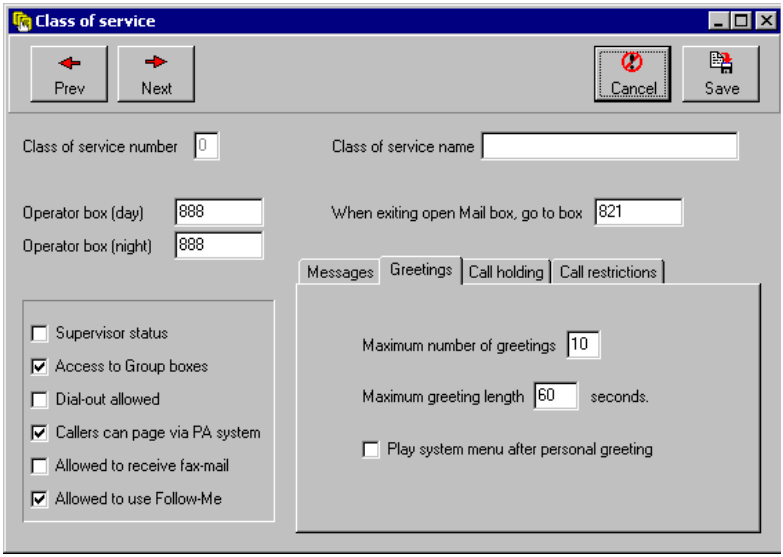
The system deletes new messages from mailboxes belonging to this class of service after the number of days you specify in the **Automatically delete NEW messages from system after *X* days** field. A new message is one the mailbox owner has not yet listened to. If you enter *0* in this field, a new message is deleted at midnight on the day the message was received. If you enter *1* in this field, a new message is deleted at midnight on the day following the day the message was received. ***Note****:Use this field with caution. Improper use may cause important messages to be lost.*

To disable the deletion of new messages, retain the default setting of 99 in this field. ***Note****: If you enter a number other than 99 in this field, remember that messages are deleted whether or not the mailbox owner has listened to them.*

3.2.2 CONTROLLING GREETINGS

To control how many greetings are allowed for a particular class of service, access the Class of Service screen for that class of service, and click on the **Greetings** tab.

Figure 4-16 Class of Service Screen, Greetings Tab



A mailbox can have up to 10 pre-recorded personal greetings. The mailbox owner may record these greetings, store them in the mailbox, and choose the greeting that is to be active at any specific time. You may want to offer use of all 10 greetings to users, or you may want to restrict them to fewer greetings. Use the **Maximum number of greetings** field to define how many personal greetings users with this class of service should be allowed to record. If you set the field to 0, callers who route to a mailbox belonging to this class of service always hear the pre-recorded system prompt, *"That extension is not available..."* The default setting is 1.

Note that in class of service 7, this field must be set to allow at least 2 greetings. Class of service 7 is assigned to mailbox 70, the supervisor mailbox that by default controls the routing boxes on the system. Because you usually set up routing boxes with at least 2 greetings, this parameter must be set to at least 2 in the supervisor mailbox class of service.

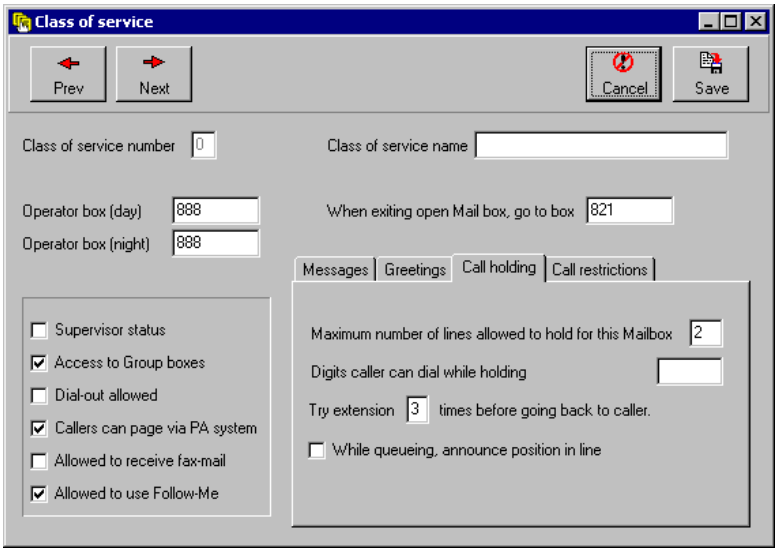
When a mailbox owner calls in to re-record his/her personal greeting, the system limits the length of the new greeting to the value you enter in the **Maximum greeting length** field. The default setting is *60*.

If an extension is busy or does not answer, Interchange plays the mailbox owner's personal greeting. After playing the greeting, it can announce the options available to the caller (for example, *"If you would like to leave a message, press 1. To try another extension, press 3, or to speak with an operator, press 0."*). If the mailbox owners do not record these options as part of their greetings, check **Play system menu again after personal greeting** so that the system plays the menu. If you want to allow your mailbox owners to decide which options to offer, do not check this field and instruct them to include the options in their personal greetings. The default setting is unchecked.

3.2.3 CONTROLLING CALL HOLDS

To control the call holding for a particular class of service, access the Class of Service screen for that class of service, and click on the **Call holding** tab.

Figure 4-17 Class of Service Screen, Call Holding Tab



You can limit the number of lines that can simultaneously hold for a mailbox belonging to this class of service. For example, if you set the **Maximum number of lines allowed to hold for this Mailbox** field to 3, and lines 1, 3, and 6 are holding for a mailbox, subsequent callers are not offered the option to hold. Instead, they hear the personal greeting recorded for the box, so they can leave a message, try another extension, etc. The default setting is 2. ***Note****: If you want to disable the call queuing feature for the class of service, set this field to 0.*

While callers are in the queue holding for an extension, they can press a digit to leave the queue and process the call differently. By default, the options open to the caller are the same as those available when the caller hears the personal greeting (*"If you would like to leave a*

message, press 1. To try another extension, press 3, or to speak with an operator, press 0."). If you want to restrict the caller to fewer choices while in the queue, use the **Digits caller can dial while holding** field to specify which digits are allowed. All other digits are ignored by the system while the caller is in the queue.

For example, if you enter 13 in this field, the only options available to the caller are:

1 To leave a message
3 To try another extension

The **Try extension X times before going back to caller** field applies only if the Max lines allowed to hold field is greater than 0. If the caller chooses to hold, the system plays a series of hold prompts to the caller (these are typically music or commercials). At the end of each hold prompt, the system tries the extension again. If it is busy, the system plays the next hold prompt to the caller.

After the defined number of hold prompts have been played, the system goes back to the caller and offers the options to remain on hold, try another extension etc. This field allows you to specify the number of hold prompts that should be played before the system offers these options to the caller.

Interchange is shipped with only one hold prompt recorded. Therefore, if you enter 3 in this field, a caller queued to a busy station hears this same prompt three times before being offered the options again. If you record the second hold prompt (147), the caller hears prompt 146, 147, 146 again before being offered the options. You may record up to 100 different hold prompts, which are played in sequence. (Remember: At the end of *each* hold prompt, the system tries the extension again). After the system plays the highest number hold prompt recorded, it returns to the lowest number after the next try. The default setting is 3.

***Note**:The time between tries to a busy extension is determined by the length of each hold prompt recorded. The prompt supplied with the system (prompt 146) is approximately 30 seconds.*

While callers are in the queue and holding for an extension, Interchange can keep them informed on the progress of their call. If you check the **While in queue announce position in line** field, Interchange announces to the caller:

"That extension is still busy. You are number [#] in line. If you would prefer to leave a message, press 1, or to speak with an operator, press 0."

If you do not check this field, the system says:

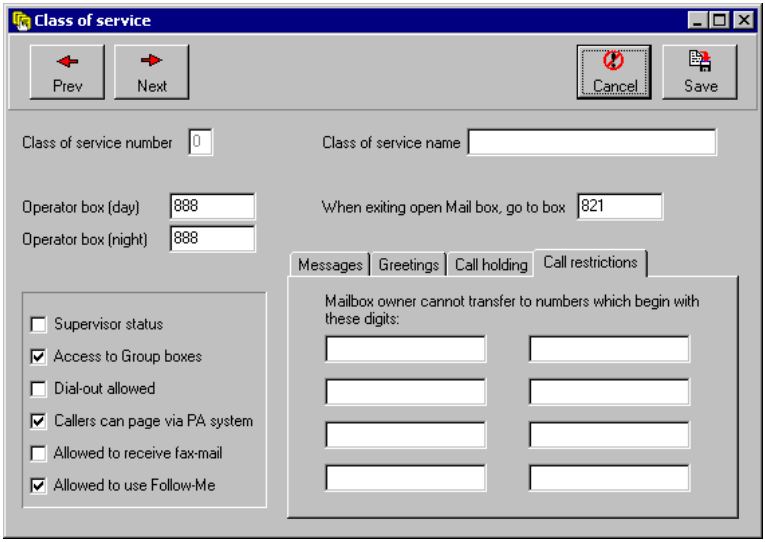
"That extension is still busy. If you would prefer to leave a message, press 1, or to speak with an operator, press 0."

The default setting is unchecked.

3.2.4 RESTRICTING CALLS

To restrict calls for a particular class of service, access the Class of Service screen for that class of service, and click on the **Call restrictions** tab.

Figure 4-18 Class of Service Screen, Call Restrictions Tab



When mailbox owners call in to change their call-transfer number, follow-me numbers, pager number, or message notification number, you may want to prevent them from changing it to certain numbers, such as long-distance numbers.

The **Mailbox owner cannot transfer to numbers which begin with these digits:** fields allow you to define digit sequences that Interchange blocks on system-generated outgoing calls. Interchange looks at each of these digits fields to determine if any of them match the number entered by the mailbox owner. If the number entered by the caller begins with the digits specified in the digits field, the system defines the number entered as a match.

For example, if you enter the digits *1900* in one of the Digits fields, the system considers the telephone numbers 1-900-555-1212, 1-900-123-4567, 1-900-111-2222 to be matches. Telephone number 1-901-555-1212 would not be considered a match.

If you enter the digit 0 in one of the Digits fields, the system considers all numbers beginning with 0 to be matches. This would include calls to the operator (0), calls to the long-distance operator (00), international calls (011), and any operator-assisted call (0 followed by telephone number).

If the mailbox owner enters a number that matches one of the digit strings you enter here, Interchange informs the owner that the number is not acceptable and does not allow the owner to change the existing call transfer setup.

These blocking digits are used to block Interchange from making automated calls; they do not block the mailbox owner from dialing the numbers directly from their own extensions. For example, a mailbox owner can dial 911 from their extension and complete the call, even though you have entered 911 here in a digits field. The block here keeps *Interchange* from dialing 911, if for example mailbox owners have listed 911 in their call transfer field, as a follow-me number, as a pager number, etc. The 911 block is delivered with the system as a default. Comdial highly recommends that you keep this 911 block to avoid your voice mail system calling an emergency line, and the fines that may result if this occurs.

3.3 Creating, Changing, or Deleting a Group Box

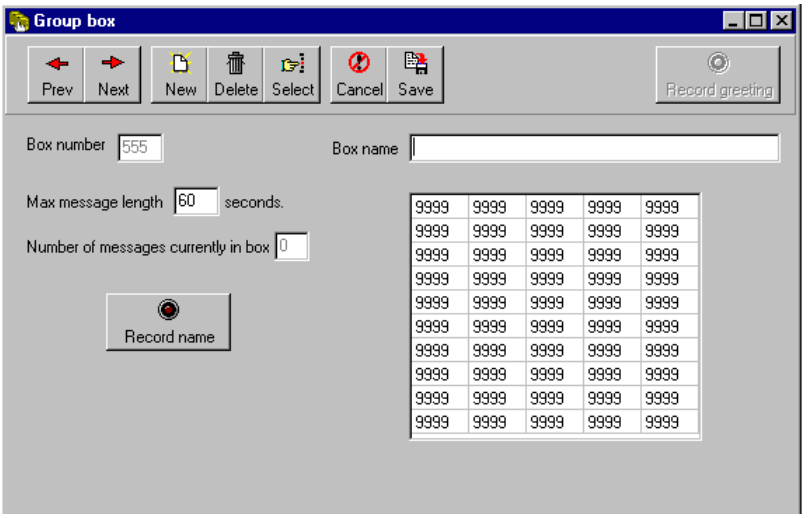
Group distribution lists, which are defined in a group box, provide mailbox owners an easy way to send one message they record to multiple individuals, without specifying each individual recipient's extension. Though mailbox owners can set up one to four personal distribution lists specific to their needs in their mailbox, many organizations also set up group distribution lists that can be used by all company employees. A group list a company maintains may, for example, contain the mailobx numbers of all company employees, of all employees in a particular department, of all employees that work a specified shift, etc.

When mailbox owners want to send a message to a group box, they log into their mailbox, then select the option to send the message. At the prompt, *"Please enter the box number,"* the mailbox owner enters the number of the group box containing the mailboxes to which the message is to be sent.

To create, modify, or delete a group box, perform the following steps

1. From the Main screen, access the *Boxes* pull-down menu.
2. Select *Group Box* from the Boxes menu.
3. Select the *New* button at the top of the screen to create a new box. When prompted, enter the number of the box you want to create. The system displays the new box. To modify or delete an existing group box, click on the *Select* button and choose the number of the box you want to modify or delete. The box displays on-screen. To delete a group box, verify you are viewing the group box you want to delete, then select the *Delete* button. When you are prompted to confirm the deletion, select the *Yes* button.
4. When you have made necessary modifications, select the *Save* button to save the changes.

Figure 4-19 Group Box Screen



The **Box number** field displays the group box number. A box number can be any number between 1 and 9899 (boxes 9900 - 9999 are reserved for the system). You cannot change the box number on the screen.

To move to the next group box number, click on *Next*. To move to the previous group box number, click on *Prev*. To create a new group box, click on *New*.

The **Record name** button identifies whether the name of the group box has been recorded. The system plays the name as soon as a caller elects to send a message to the group box.

Interchange signifies an existing recording by displaying a red light on the button.

You can record the name by clicking on the Record Name button, then using the controls on the Sound Recorder dialog box. At the lower right of the dialog, click on the circle button to begin recording. Click on the rectangle button (to the left of the circle button) to end the recording.

The **Number of messages currently in box** field cannot be changed from the keyboard. It indicates the number of messages in the group box.

You can limit the length of messages that are sent to this group box. To do so, enter the lenght (in seconds) in the **Max message length *X* seconds** field.

The member fields on the right side of the Group box menu show the current members of the group box. To add a mailbox to the group, enter the mailbox number on this list. To delete a mailbox from the group, move the cursor to the mailbox number to be deleted, and delete the number from the field. A group box can contain up to 50 members.

To send messages to groups containing more than 50 mailboxes, use one of the following methods:

- Use the Send to Multiple Mailboxes option to send the message to additional group boxes. After selecting the first group box and recording the message, press the # key for more options. From the menu that plays, choose option 6 to send the message to several mailboxes or group boxes.
- Connect a group box to a text file, which can contain an unlimited number of members. Create a text file in the C:\VM\ directory with the name Gbox*XXXXXXXXX*.LST, where xxxxxxxxx is the number of an existing group box. Note that if the existing group box number is less than nine digits, you must include leading zeros before the mailbox number in this filename. For example, to create an extended member file for group box 601, create a text file named Gbox000000601.LST and list each *additional* mailbox on a separate line in the file (do not duplicate members in the group box screen and the text file).

3.4 Changing Company Business Hours

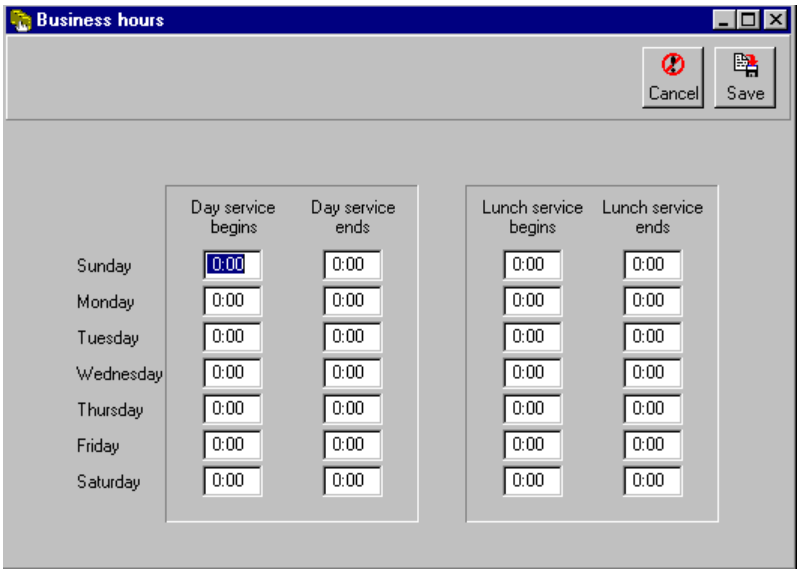
Interchange allows you to set up or change the business hours your company uses, including Day Service and Lunch Service. By default, any period not defined as part of Day Service or Lunch Service is considered part of Night Service mode.

The system automatically switches between Day Service, Night Service, and Lunch Service based on the times you enter in these fields. (See Section 1.2, *Understanding Supervisor Responsibilities* for more information on how the system uses service modes and the hours you designate.)

To modify the company business hours perform the following steps.

1. From the Main screen, access the *System* pull-down menu.
2. Select *Business Hours* from the menu. The business hours screen displays.
3. Change the business hours on the Business Hours screen. When you have made necessary modifications, select the Save button to save the changes.

Figure 4-20 Business Hours Screen



For each day of the week, enter the opening and closing times for the business. If the business is closed all day, enter *00:00* in both the **Day service begins** and **Day service ends** fields. This places the system in the Night Service mode for that entire day. ***Note:*** *All times must be entered in 24-hour format—for example, enter 8:00 PM as 20:00).*

If your business is open 24 hours on a particular day, enter *00:00* for the Day service begins and *24:00* for Day service ends times.

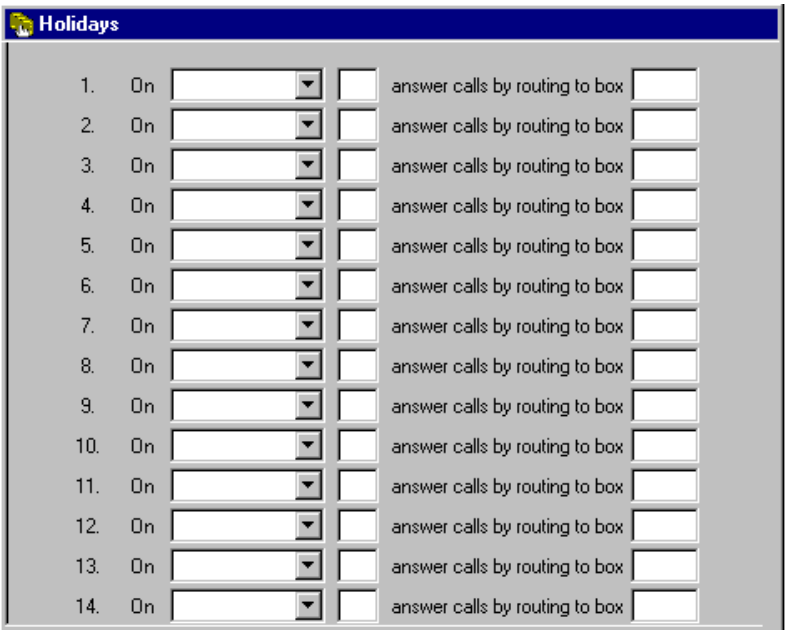
3.5 Changing Company Holidays

In addition to answering calls differently during different times of day, Interchange can answer calls in a special way during various holidays. For example, on New Year's day, your company may be working with a smaller staff, so you may want the system to greet customers with:

"The XYZ Company wishes all its customers a Happy New Year. Our service personnel are not available today, but will be back as usual tomorrow. For Sales, press 1, or press 0 to speak to an operator."

You can pre-define up to 20 holiday dates. For each holiday, you can specify a different routing box to which calls will be sent. During the holiday, Interchange uses the greeting and call routing scheme you have defined in that routing box

Figure 4-21 Holidays Screen



To modify the designated company holidays, perform the following steps.

1. From the Main screen, access the *System* pull-down menu.
2. Select *Holiday Schedule* from the menu. The holiday schedule screen displays.
3. Modify the company holidays on the HOLIDAY SCHEDULE screen. When you have made necessary modifications, click on the *Save* button to save your changes.

The following example shows how to set up a New Year's holiday greeting to play on January 1.

1. Access the Holiday Schedule screen and select January as the month, then enter *1* to indicate the first day of the month. ***Note:*** *Holiday greetings are in effect for the entire 24-hour period of the calendar day.*
2. In the Inital box field, enter a spare box number. In this example, box number 8500 is used.

   Interchange is now advised of the New Year's holiday. Each time a call arrives on January 1, the system routes the call to box 8500.
3. To complete this example, you must create routing box 8500. You add routing boxes by accessing the Routing Box screen. Click on *Add* and type *8500* in the window that displays. Once you create a routing box, you can record a greeting in it (in this example, a New Year's specific holiday greeting) and set up the various routing options as described in Section 3.7, *Changing the Routing in a Routing Box*.

3.6 Changing the Greeting Played by a Routing Box

Before modifying any routing box greetings, refer to Section 1.2.8, *Changing the Greeting Played by a Routing Box* and Section 1.2.9, *Changing the Routing in a Routing Box* for information on the routing box setups on the system and routing box greetings.

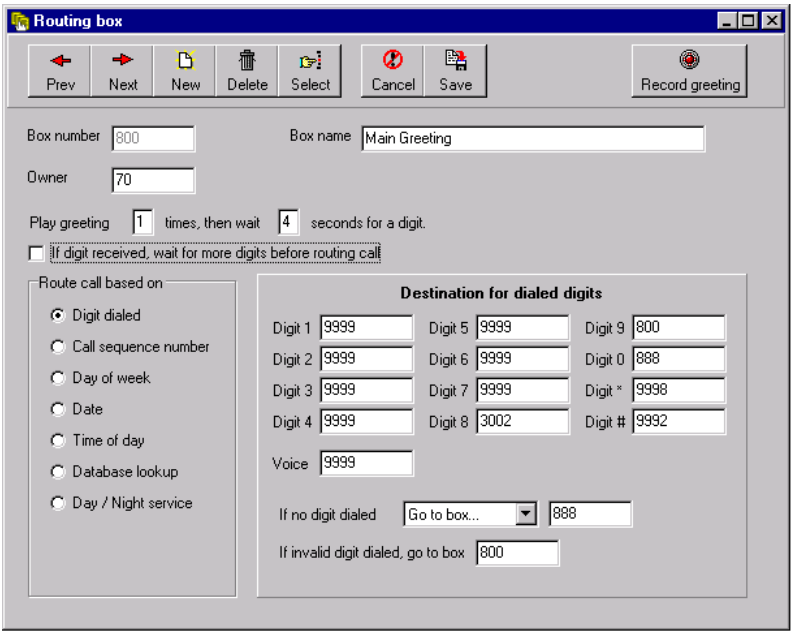
Note that if you use the following procedure to change the greeting in a routing box, you must update the routing box call routing structure to relay new instructions to the caller. See Section 3.7, *Changing the Routing in a Routing Box* for more details.

To modify a Routing box greeting, perform the following steps.

1. From the Main screen, select the *Boxes* pull-down menu.
2. Select Routing Box from the Boxes menu.

3. Click on the Select button and choose the number of the box whose greeting you want to modify. The box displays on-screen.
4. Adjust the greeting using the Routing Box screen. When you have made necessary modifications, click on the *Save* button to save your changes.

Figure 4-22 Routing Box Screen



The **Record greeting** button in the upper right corner identifies whether a greeting has been recorded for this routing box. An existing recording is signified by a red light displaying on the button.

The greeting is played as soon as a caller is routed to the routing box.

You can record the greeting by clicking on the Record Greeting button, then using the controls on the Sound Recorder dialog box. At the lower right of the dialog, click on the circle button to begin recording. Click on the rectangle button (to the left of the circle button) to end the recording.

The greeting can also be recorded remotely by the owner of the routing box. Note that once a routing box has been assigned an owner, the routing box is allowed the same number of greetings as the owner mailbox, as defined in the mailbox's assigned class of service.

Once the system has finished playing the greeting, it may optionally play the time or date, depending on the contents of the *Box Name* field.

3.7 Changing the Routing in a Routing Box

Interchange uses routing boxes to send (route) calls to boxes throughout the system. Typically, routing boxes are set up to play an announcement (greeting) to callers that prompts them to select a single-digit choice from a list of options. For example:

"You have reached our service department. If you are calling to inquire about the status of a repair, please press 1. For all other inquiries, please press 2. If you need assistance, please press 3."

When a system set up this way, a call is transferred to a certain mailbox when the caller presses 2 during or after the greeting. You can control the digit(s) callers can dial and the route their calls will subsequently take.

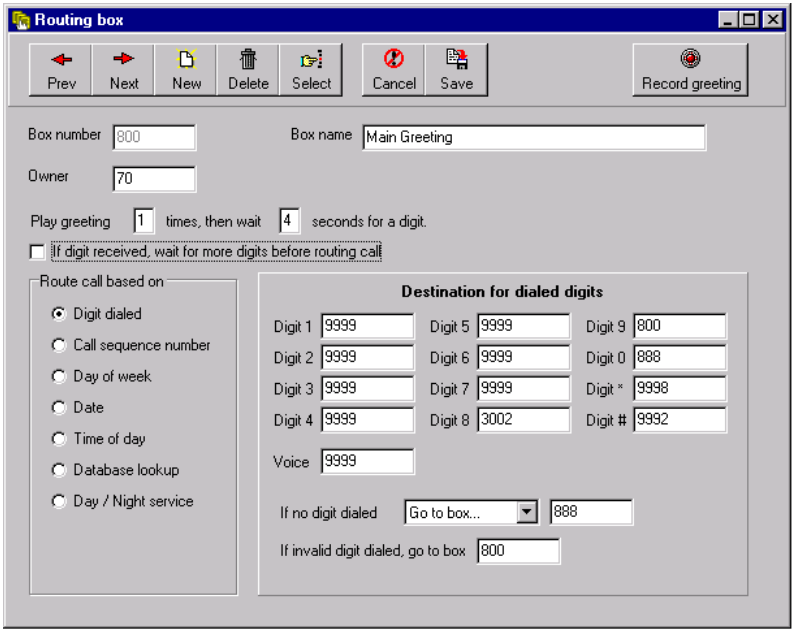
Interchange can also route calls based on certain criteria, such as the time of day or day of week on which the call is received, the order in which the call is received, etc.

Use caution when changing the routing boxes set up on your system by your Interchange System Technician. If you have any questions, contact that technician proir to making changes. And, if you do change the call routing set up, you must update the routing box greeting to relay new instructions to the caller. (See Section 3.6, *Changing the Greeting Played by a Routing Box* for futher details.)

To modify call routing, perform the following steps.

1. From the Main screen, access the Boxes pull-down menu.
2. Select *Routing Box* from the Boxes menu.
3. Click on the *Select* button and choose the number of the box you want to modify or delete. The box's setup screen displays.
4. Make changes to the Routing Box screen to modify the call routing used when calls are sent to this box. When you have made any necessary modifications, click on the *Save* button to save your changes.

Figure 4-23 Routing Box Screen



The **Box number** field displays the routing box number. A box number can be any number between 1 and 999999999 (boxes in the range 9970 - 9999 and 0 are reserved for the system). You cannot change the box number field. To view another routing box, click *Next* to view the next sequential routing box, click *Prev* to view the previous routing box. To add a new Routing box, click *New.*

The **Box name** field contains the name assigned to the routing box. The name appears on the database listing and is used for record keeping.

If you want the system to announce the current time after it plays the routing box greeting, insert the word *Time* inside brackets before the box name (for example, if the box name is New Products, change it to [Time] New Products. If you want the system to play the current date, insert [Date] before the box name. A single routing box can play the time or the date, but not both. By connecting two routing boxes together, however, you can play both the time and the date to the caller. Ask your Interchange System Technician if you would like more information on how to do this.

The **Owner** field contains the mailbox number of the owner of the routing box. The owner has the ability to call in to the system to re-record the routing box greeting or select a different active greeting. If you do not want to provide this remote administration option, or if not more than one greeting is required for the routing box, leave this field blank.

While Interchange is playing the greeting for the routing box, it also listens for the caller to enter a digit. If the system gets to the end of the greeting without detecting a digit from the caller, it waits the amount of time specified in the *wait X seconds for a digit* field. If no digits are detected before this time has elapsed, the system repeats the routing box greeting the number of times specified in the **Play greeting X times** field.

In the **wait x seconds for a digit** field, enter the number of seconds you want Interchange to wait to detect the first digit from the caller. Once the system receives the first digit, it either waits for additional digits or immediately routes the call based on the other fields in the routing box.

If the caller dials a digit, the system checks the **If digit received, wait for more digits before routing call** field:

- If this field is not checked, the system immediately attempts to route the call based on the single digit dialed. If the *Destination for dialed digit field* contains a valid box number, the call is immediately sent to the new box. This means that menu selections take priority over extension numbers (for example, if the destination for digit 1 is a valid box, the caller cannot dial mailboxes beginning with a 1, as the system routes the call as soon as it receives the first 1 in the extension number).

If this field is checked, the system waits to see if the caller is dialing a sequence of digits (for example, entering a box number). If the system detects additional digits, and they correspond to a valid mailbox, routing box, etc., it routes the call to that box. If the system detects only one digit, it consults the *Destination for dialed digits* fields and routes the call to the box specified. Since the system must wait for additional digits, call routing is not executed as quickly as when this field is unchecked.

The bottom portion of the Routing Box menu allows you to specify how you want Interchange to route the calls. The fields on the right side of the menu will change, based on what you select in the left side of the menu under **Route call based on**.

This area allows you to specify how you want Interchange to route a call to this box. There are five techniques you can use to route calls:

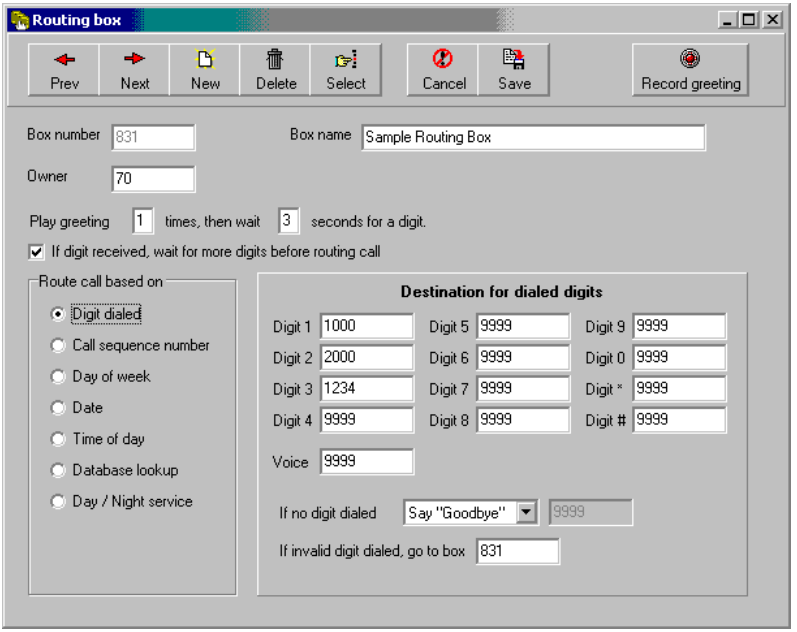
- Based on the digit(s) dialed by the caller,
- Based on the call's sequence number (first call goes to box [number], second call goes to box [number], etc.),
- Based on the day-of-week (Sunday, Monday, etc.) the call is received,
- Based on the date that the call is received,
- Based on the time of day the call is received,
- Based on the results of a database lookup, or

- Based on whether the system is in Day Service, Lunch Service, or Night Service or whether the call is received on a defined holiday.

3.7.1 ROUTING CALLS BASED ON DIGITS DIALED

When you select the **Digits dialed** field, Interchange displays the related field on the right of the menu.

Figure 4-24 Routing Based on Digits Dialed



If you select this field, callers can press a key at any time to make a selection from the menu (or they can dial a mailbox directly) while the system is playing the routing box greeting. When the caller presses a key, Interchange immediately stops playing the greeting and processes the dialed digit.

If the caller does not dial a digit and the system reaches the end of the greeting, it pauses to wait for a response. If the system does not detect a response (DTMF or spoken word), the system performs whatever action is specified in the *If no digit dialed* field.

While the system is playing the routing box greeting, the caller can press a key at any time to make a selection. When the caller presses a key, the system immediately stops playing the greeting and consults the **Destination for dialed digits** fields to see where the call is to be routed.

Note: Traditionally, Interchange uses the # key to allow mailbox owners to access the voice mail gateway (box 9992). Therefore, COMDIAL STRONGLY RECOMMENDS YOU PROGRAM DESTINATION FOR DIALED DIGIT # AS 9992 IN EVERY ROUTING BOX *so mailbox owners can access the gateway at any time. Though you may program any other digit as the voice mail gateway, all user documentation is written based upon using the # key.*

The **If no digit dialed** field, just underneath the *Destination for dialed digits* fields, allows you to tell Interchange what action to take if the caller does not enter any digits within the alloted amount of time. Available options include the following.

Option	Action System Takes
Go to box	Routes the call to another box. Enter the new box number in the next field.
Say goodbye	Says, "*Good-bye"* and then hangs up
Return	Goes back to the previous box that handled this call (usually a routing box).
Hang up	Interchange immediately terminates the call by going on hook.

Note that the absence of a digit may mean that the caller has hung up.

CAUTION

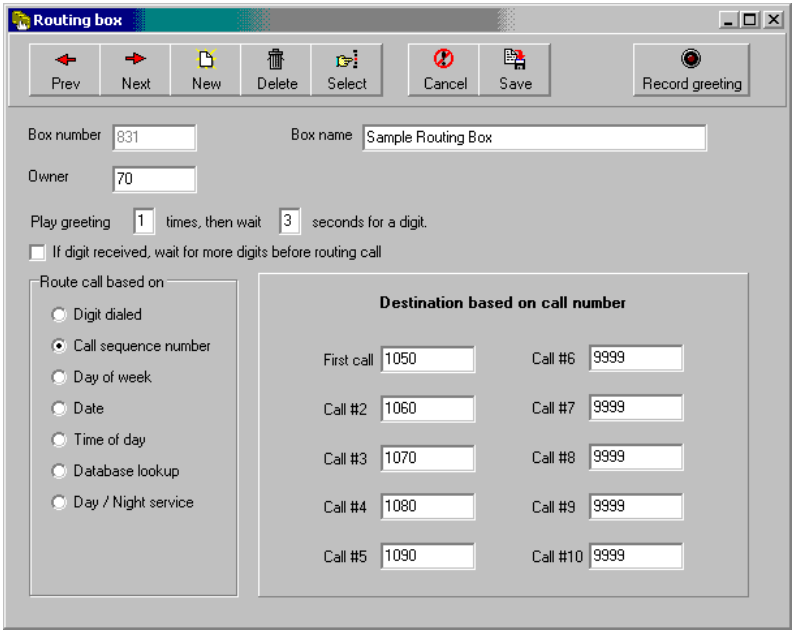
If your telephone system does not offer consistent and reliable disconnect supervision, do not instruct Interchange to go back to this same box if no digits are dialed; otherwise it might stay in this box continually and not disconnect the call.

Contact your Interchange System Technician if you have any questions.

3.7.2 ROUTING CALLS BASED ON CALL SEQUENCE NUMBER

When you select the **Call sequence number** field, Interchange displays the related field on the right of the menu.

Figure 4-25 Routing Based on Call Sequence



If you select this option on the Routing box menu, Interchange begins by playing the routing box greeting. Once the greeting ends, the system immediately routes the call to the box specified in one of the **Destination based on call number** fields, in numerical order.

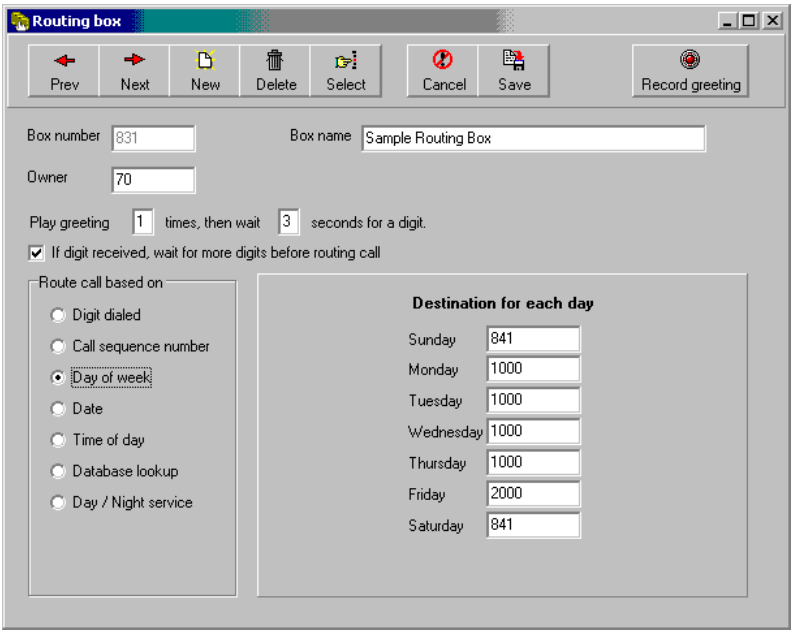
Call Number	Box to Which Call is Routed
First call to this box	Box specified in the **First call** field.
Second call to this box	Box specified in the **Call #2** field.
Third call to this box	Box specified in the **Call #3** field.
Fourth call to this box	Box specified in the **Call #4** field.
Fifth call to this box	Box specified in the **Call #5** field.
Sixth call to this box	Box specified in the **Call #6** field.
etc.	etc.

If the caller dials any digit while the routing box greeting is playing, Interchange stops the greeting and routes the call according to how you have set up these fields.

3.7.3 ROUTING CALLS BASED ON DAY OF WEEK

When you select the **Day of Week** field, Interchange displays the related field on the right of the menu.

Figure 4-26 Routing Based on Day of Week



If you select this option, the system plays the routing box greeting. Once the greeting ends, the system immediately routes the call to the box specified in the **Destination for each day** fields that corresponds to the day of the week.

Day Call Received	Box to Which Call is Routed
Sunday	Box specified in the **Sunday** field.
Monday	Box specified in the **Monday** field.

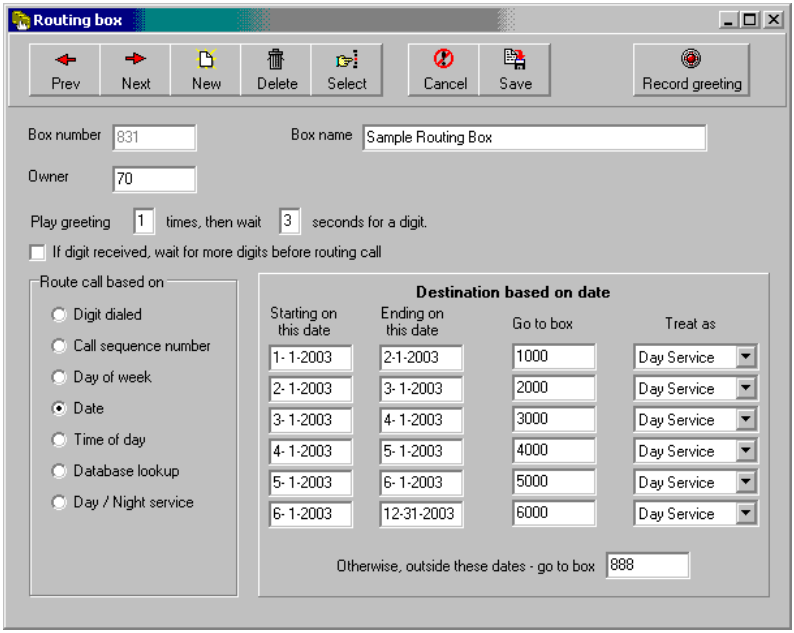
Day Call Received	Box to Which Call is Routed
Tuesday	Box specified in the **Tuesday** field.
Wednesday	Box specified in the **Wednesday** field.
Thursday	Box specified in the **Thursday** field.
Friday	Box specified in the **Friday** field.
Saturday	Box specified in the **Saturday** field.

If the caller dials any digit while the routing box greeting is playing, Interchange stops the greeting and routes the call according to how you have set up these fields.

3.7.4 ROUTING CALLS BASED ON DATE

When you select the **Date** field, Interchange displays the related field on the right of the menu.

Figure 4-27 Routing Based on Date



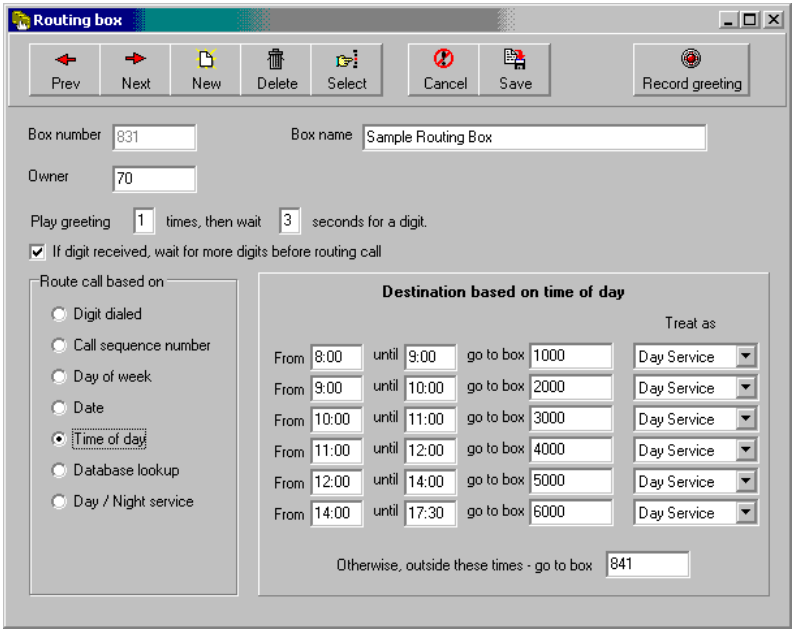
If you select this option, the system begins by playing the routing box greeting.

Once the greeting ends, the system immediately routes the call to the box specified in the **Go to box** field that corresponds with the date range during which the call has been received. You can specify up to six date ranges in the **Starting on this date** and **Ending on this date** fields. You also specify the box to which calls should be routed for each date range, and whether each date range should be treated as Day Service, Night Service, Lunch Service, or Holiday Service in the **Treat as** field. (If you select the default *No Change* in the *Treat As* field, the system's service mode will be determined by those defined on the *Business Hours* screen.) You can also specify a box to which calls should be routed if they are received during a date range that is not specified in the **Otherwise, outside these dates - go to box *X*** field.

3.7.5 ROUTING CALLS BASED ON TIME OF DAY

When you select the **Time of day** field, Interchange displays the related field on the right of the menu.

Figure 4-28 Routing Based on Time of Day



If you select this option, the system begins by playing the routing box greeting.

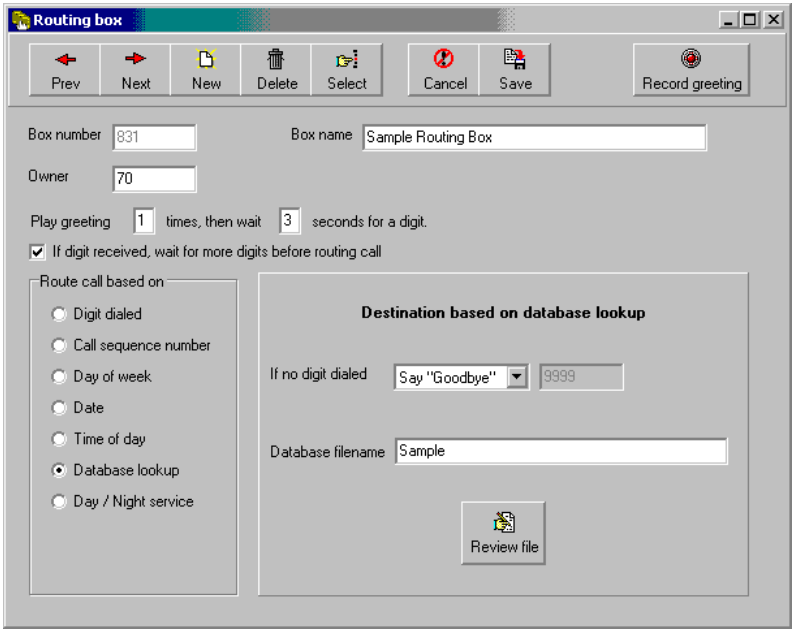
Once the greeting ends, the system immediately routes the call to the box specified in the **go to box** field that corresponds with the span of time during which the call has been received. You can specify up to six time spans in the **From** and **until** fields. You also specify the box to which calls should be routed for each time span, and whether each time span should be treated as Day Service, Night Service, Lunch Service, or Holiday Service in the **Treat as** field. (If you select the default *No Change* in the *Treat As* field, the system's service mode

will be determined by those defined on the *Business Hours* screen.) You can also specify a box to which calls should be routed if they are received during a time span that is not specified in the **Otherwise, outside these times - go to box *X*** field.

3.7.6 ROUTING CALLS BASED ON DATABASE LOOKUP

When you select the **Database Lookup** field, Interchange displays the related field on the right of the menu.

Figure 4-29 Routing Based on Database Lookup



If you select this option, Interchange accepts up to 20 digits from the caller and uses these to look up a database entry in the file name specified in the **Database filename** field. The system converts these digits to a box number, based on the contents of the database. The system then routes the call to that box.

The **If no digit dialed** field allows you to tell Interchange what action to take if the caller does not enter any digits within the alloted amount of time. Available options include the following.

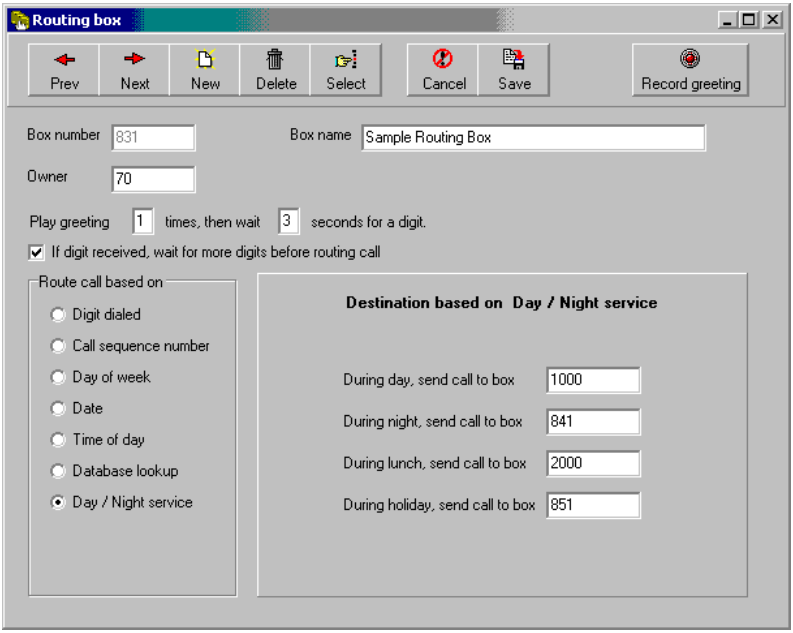
Option	Action System Takes
Go to box	Routes the call to another box. Enter the new box number in the next field.
Say goodbye	Says, "*Good-bye"* and then hangs up
Return	Goes back to the previous box that handled this call (usually a routing box).
Hang up	Interchange immediately terminates the call by going on hook.

For more information on routing calls based on database lookup, contact your Interchange system technician.

3.7.7 ROUTING CALLS BASED ON DAY/NIGHT SERVICE

When you select the **Day/Night service** field, Interchange displays the related field on the right of the menu.

Figure 4-30 Routing Based on Day/Night Service



If you select this option, Interchange begins by playing the routing box greeting. Once the greeting ends, the system immediately routes the call to the box specified in one of the **Destination based on Day / Night service** fields, based on the system's current service mode.

If the caller dials any digit while the routing box greeting is playing, Interchange stops the greeting and routes the call according to how you have set up these fields.

4. SYSTEM REPORTS

Interchange includes an extensive reports package that allows system administrators to generate reports and view them on any PC installed with Microsoft Excel. (Note that Microsoft Excel is not included with Interchange.)

Comdial automatically installs the reports package software during the Interchange installation on the system PC. If Microsoft Excel is also installed on the system PC, you can both generate reports and view reports on the Interchange system PC. You can also view reports on a networked client PC, whether or not Excel is installed on the system PC. To do so, however, the Interchange system installation technician must install the reports package client software on the client PC. Contact your Interchange system technician for details.

Note: *To show reports effectively, client computers must be Pentium 166 PCs or better with at least 32 MB RAM. Set monitor resolution to a minimum of 800 x 600 for best viewing.*

4.1 Generating Reports

Each night, Interchange automatically compiles system report data in a Microsoft Access database file named DBREPORT.MDB. This file stores data for each day, up to one year. In the first week of January each year, the system renames the DBREPORT.MDB file to DBREPORT.[YEAR].MDB (where [year] is the four-digit year such as 2003). The system then clears the DBREPORT.MDB file and begins tabulating the current year's data.

4.2 Accessing Reports

You can select to view reports from client PCs where both the reports package client software and Microsoft Excel have been installed, or from the Interchange system PC if Microsoft Excel is also installed on the PC. To view reports, click on the Start button and select Programs\Voice Processing System\Reporting Features\View CS Reports.

Note: *When Excel opens the workbook, it prompts you to enable the macros within the file. Select the option to* Enable Macros*, otherwise data within the report cannot be tabulated.*

No matter how you select to view reports, you are prompted to enter your System Administrator password before you can view the system information. Enter the Administrator password that was valid the previous evening (the last time the report data was compiled).

Once you enter the password, Interchange reads the data in the Microsoft Access database file DBREPORT.MDB, and opens a Microsoft Excel workbook file containing several worksheets. Each worksheet presents data for a specific report.

4.3 Setting up Report Defaults

On the first page of the workbook, enter the name of your company. This name will appear on all subsequent report worksheet pages on-screen, and on printed reports. The *Started* and *Last Updated* fields on the first page identify the dates for which report data is available. You cannot change these fields.

Under the *System Information* heading on the first workbook page, the report identifies the number of ports on the system and the total length of messages that are currently stored, in hours and minutes. This area also displays the amount of time free for additional voice and fax message storage. This figure helps you quickly identify if the system is low on available storage space.

Under the *Defaults* heading on the first workbook page, you can modify settings that determine the report time-frame information that will be included by default on report worksheets *the next time you select to view reports*. Note that although you modify the *default* view settings on this page, you can modify the view settings on a report-by-report basis as many times as you like as you view specific report worksheets. You make these report-specific modifications using fields in the upper-right portion on the worksheet screens. When you modify report time-frame settings on a particular screen, you must also select the *Update* button on the screen to re-draw it using the new settings you specified.

4.4 Viewing and Working with Reports

You can sort specific data on report worksheets and print the entire workbook, or print specific report worksheets using standard Excel commands. You can also use the *Save As* command on the file menu to save the file to a drive or diskette. (Refer to the Microsoft Excel documentation if you need additional information on saving files.)

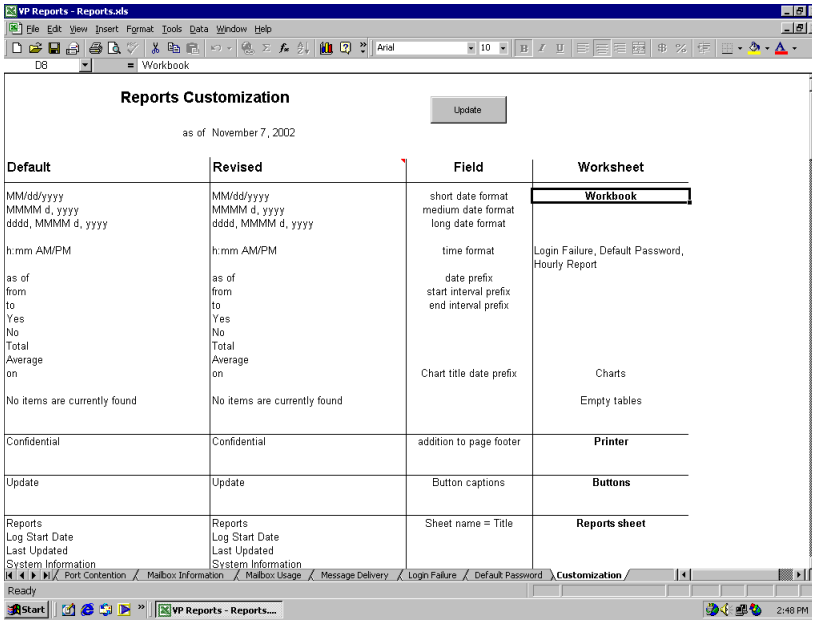
Note that while you view and work with the report, the system is reading the data in the workbook from the Access database file DBREPORT.MDB on the system PC. If you use the *Save As* command to save the report under a different drive, directory, or filename, the workbook will no longer be reading the Access database file, so you cannot modify report time-frame dates and re-generate screens within the report.

When you close the Excel file, the system prompts you to save your changes. If you select the *Yes* option, Interchange saves the name you entered for the company and the default view settings you indicated on the first page of the workbook.

4.5 Customizing Reports

Once you access the report workbook, you can customize the presentation of data in each report by changing options on the Reports Customization worksheet. By changing information in the Revised column of this worksheet, you can adjust the presentation of dates and times in the report and the names assigned to fields on report worksheets. The Default column indicates the standard settings shipped with the Report Generation package.

Figure 5-1 Report Customization Screen



To change a field name or date/time presentation on a particular worksheet, first locate the line you want to change on the Reports Customization worksheet. Do this by scrolling down the Worksheet column to locate the worksheet containing the field you want to change. Look in the **Field** column to locate a reference to the field. Indicate the change you want to make in the **Revised** column. Click

on the *Update* button at the top of the screen to apply the change. Be sure to review the worksheet with your revised entry. In some instances, you may find you need to adjust the revision you make because the revised entry does not fit properly onto the worksheet.

To following table shows how you can customize the format of date and time displays.

To display:	Use this format:
Months as 1-12	M
Months as 01-12	MM
Months as Jan-Dec	MMM
Months as January-December	MMMM
Days as 1-31	D
Days as 01-31	dd
Days as Sun-Sat	ddd
Days as Sunday-Saturday	dddd
Years as 00-99	yy
Years as 1900-1999	yyyy
Hours as 0-23	h
Hours as 00-23	hh
Minutes as 0-59	m
Minutes as 00-59	mm
Seconds as 0-59	s
Seconds as 00-59	ss

4.6 Report Types

Interchange provides two types of reports:

- system reports, that provide detail and summary statistics on port usage and call activity, and
- mailbox reports, that provide detail and summary statistics on individual mailbox usage.

4.6.1 SYSTEM REPORTS

System reports allow you to look at system level information. There are six types of system reports:

- Class of Service
- Hourly Statistics
- Port Activity
- Port Contention
- Port Contention Trend – Monthly
- Port Contention Trend – Weekly.

4.6.1.1 Class of Service Report

The Class of Service report displays the current setting for each feature included in each of the 32 available classes of service (numbered 0 through 31), including any outdialing restrictions as well as digits that can be dialed while holding. Use this report to review the contents of all classes of service on a single screen (or paper).

Figure 5-2 Class of Service Report, Top of Screen

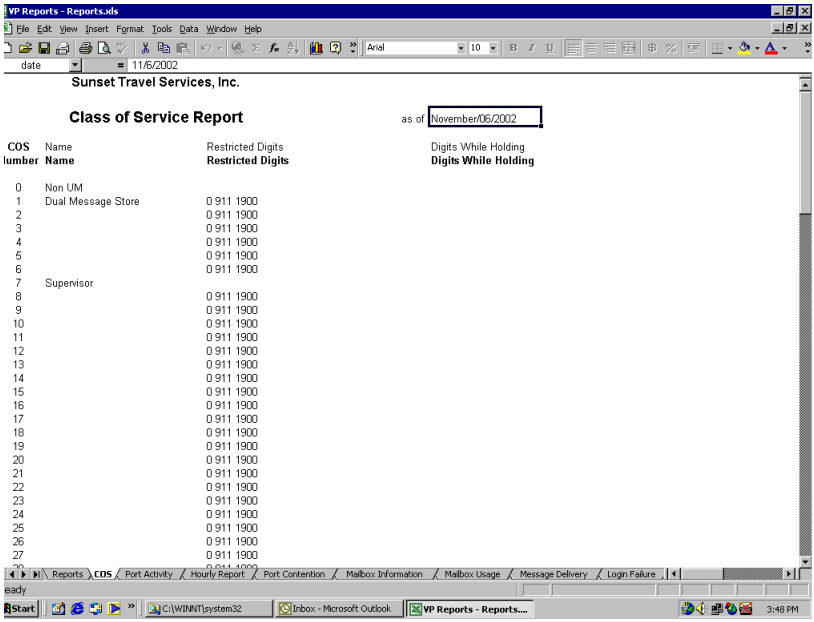
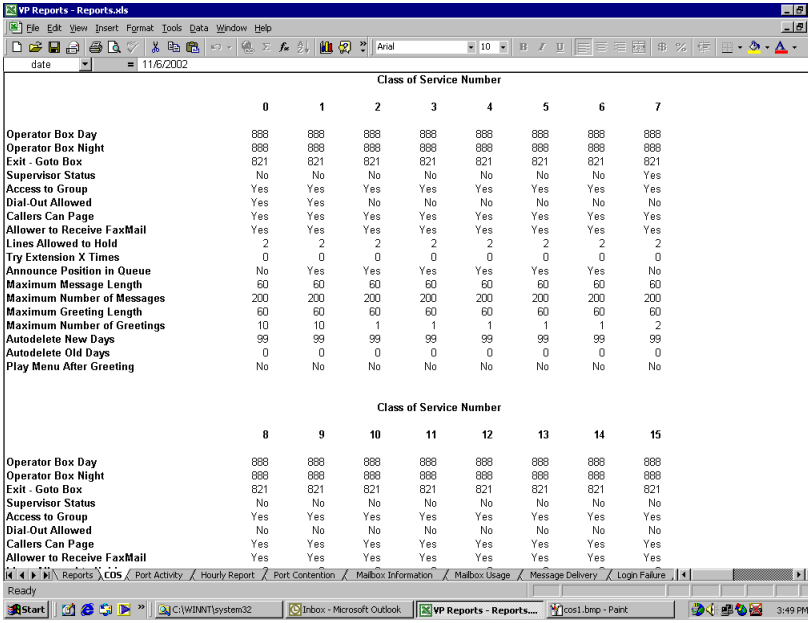


Figure 5-3 Class of Service Report, Bottom of Screen



VP Reports - Reports.xls

File Edit View Insert Format Tools Data Window Help

date = 11/6/2002

Class of Service Number

	0	1	2	3	4	5	6	7
Operator Box Day	888	888	888	888	888	888	888	888
Operator Box Night	888	888	888	888	888	888	888	888
Exit - Goto Box	821	821	821	821	821	821	821	821
Supervisor Status	No	No	No	No	No	No	No	Yes
Access to Group	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Dial-Out Allowed	Yes	Yes	No	No	No	No	No	No
Callers Can Page	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Allower to Receive FaxMail	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Lines Allowed to Hold	2	2	2	2	2	2	2	2
Try Extension X Times	0	0	0	0	0	0	0	0
Announce Position in Queue	No	Yes	Yes	Yes	Yes	Yes	Yes	No
Maximum Message Length	60	60	60	60	60	60	60	60
Maximum Number of Messages	200	200	200	200	200	200	200	200
Maximum Greeting Length	60	60	60	60	60	60	60	60
Maximum Number of Greetings	10	10	1	1	1	1	1	2
Autodelete New Days	99	99	99	99	99	99	99	99
Autodelete Old Days	0	0	0	0	0	0	0	0
Play Menu After Greeting	No	No	No	No	No	No	No	No

Class of Service Number

	8	9	10	11	12	13	14	15
Operator Box Day	888	888	888	888	888	888	888	888
Operator Box Night	888	888	888	888	888	888	888	888
Exit - Goto Box	821	821	821	821	821	821	821	821
Supervisor Status	No	No	No	No	No	No	No	No
Access to Group	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Dial-Out Allowed	No	No	No	No	No	No	No	No
Callers Can Page	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Allower to Receive FaxMail	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Reports | COS | Port Activity | Hourly Report | Port Contention | Mailbox Information | Mailbox Usage | Message Delivery | Login Failure

Ready

Start | C:\WINNT\system32 | Inbox - Microsoft Outlook | VP Reports - Reports.... | cos1.bmp - Paint | 3:49 PM

4.6.1.2 Port Activity Report

The Port Activity report provides call information for each Interchange system port. As you view the report, you can modify the range of dates to be included.

Use this report to monitor overall system performance, such as:

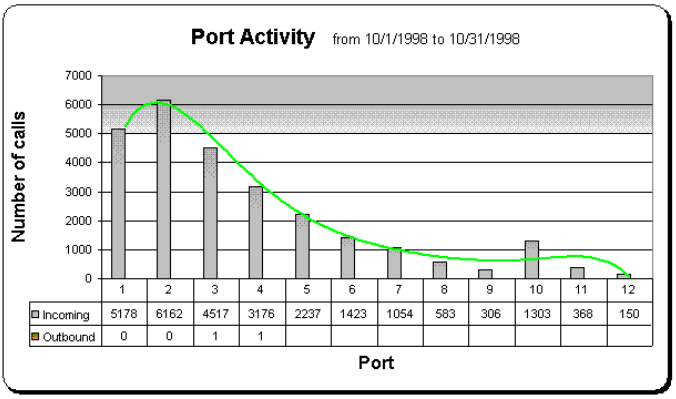
- Are there enough ports to handle all outbound activities? (such as wake-up calls, message waiting lamp calls, message delivery calls, etc.)
- What is the typical average call length? If this number is exceptionally high or low, there may be a technical problem (such as a bad voice board) or a design issue (such as increased call length resulting because callers are using a new question box or IVR application.) This number could also be high if prompts in a routing box are confusing, causing callers to take a long time to navigate through them.

Figure 5-4 Port Activity Report

Sunset Travel Services, Inc.

Port Activity Report

from October 1, 1998
to October 31, 1998



Port	Incoming Calls	Average Incoming Length (m:ss)	Outbound Calls	Average Outbound Length (m:ss)	Average Call Length (m:ss)	Failed Outcalls	
1	5178	1:55	0	0:00	1:55	0	
2	6162	1:25	0	0:00	1:25	0	
3	4517	1:29	1	2:57	1:29	0	
4	3176	1:35	1	0:16	1:35	0	
5	2237	1:40	1	0:32	1:40	0	
6	1423	1:44	0	0:00	1:44	0	
7	1054	1:39	990	0:05	0:54	0	
8	583	1:41	6	1:56	1:41	0	
9	306	1:45	99	1:00	1:34	3	
10	1303	1:36	263	1:00	1:30	10	
11	368	2:23	617	0:20	1:06	9	
12	150	1:47	370	0:25	0:49	5	
Total	26457		2348			27	28805
Average		1:42		0:46	1:24		

4.6.1.3 Hourly Statistics Report

The Hourly Statistics report provides the *average* system call activity by hour. You can optionally exclude weekends or Sundays from the report.

Use this report to identify peak traffic periods (and potential bottlenecks).

Example:

A spike in the number of calls processed between a certain time period during the day may identify increased traffic resulting from callers experiencing longer than normal hold times, and thus tying up system ports for extended periods of time. If a review of the Port Contention report shows that during that same period 100% of the Interchange system ports are in use, it is likely that additional callers are receiving a busy signal instead of being processed by the system.

Possible solutions:

- Increase the number of people answering calls during that period.
- Adjust call routing or provide additional staff training so calls are handled more efficiently and ports are freed more quickly.
- Increase the ports on the system.

Figure 5-5 Hourly Statistics Report

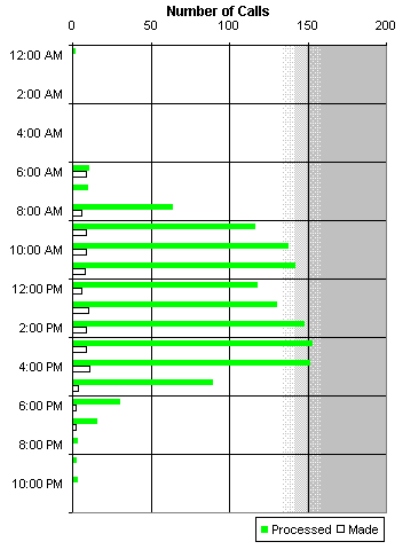
Sunset Travel Services, Inc.

Hourly Statistics Report

Average excluding weekends

from October 1, 1998
to October 31, 1998

	Average Calls Processed	Average Calls Made	Average Failed Calls
12:00 AM	2	1	
1:00 AM	0	0	
2:00 AM	0	0	
3:00 AM	0	0	
4:00 AM	0	0	
5:00 AM	0	0	
6:00 AM	11	9	
7:00 AM	10	1	
8:00 AM	64	6	
9:00 AM	117	9	
10:00 AM	138	9	
11:00 AM	142	8	
12:00 PM	118	6	
1:00 PM	131	10	
2:00 PM	148	9	
3:00 PM	153	9	
4:00 PM	152	11	
5:00 PM	90	4	
6:00 PM	31	2	
7:00 PM	16	2	
8:00 PM	4	0	
9:00 PM	3	0	
10:00 PM	4	0	
11:00 PM	1	0	
Average a day	1335	96	0



Hourly Report

from 10/1/1998 to 10/31/1998
Average excluding weekends

4.6.1.4 Port Contention Report

The Port Contention report graphically displays the total amount of time Interchange experiences 50%, 75%, and 100% *port contention,* meaning all ports are busy or in use simultaneously. (If a range of days is specified, the information for the busiest day during that range is shown, and the date of that day is identified above the graphic.)

Use this report to identify peak traffic time periods. Note that if port contention at any hour is nearing or at 100%, some callers to the company may be hearing a busy signal. This indicates that either additional ports need to be added, or that staffing, call routing, or other adjustments need to made as discussed in Section 4.6.1.3, *Hourly Statistics Report*.

Figure 5-6 Port Contention Report

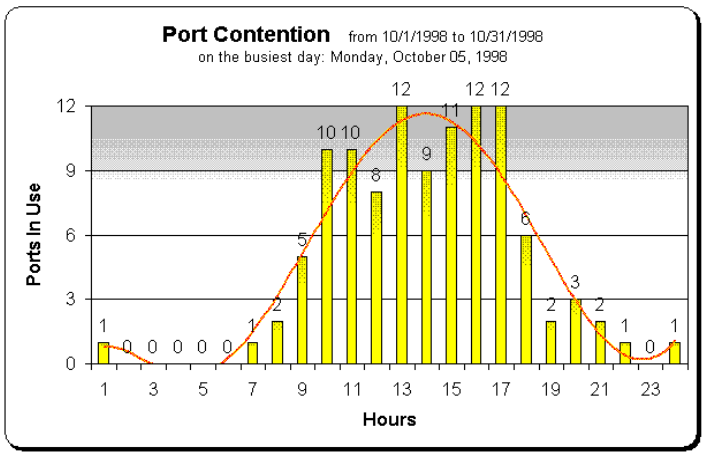
Sunset Travel Services, Inc.

Port Contention Report

from October 1, 1998
to October 31, 1998

Total time (hh:mm)

All ports in use	3:38
more then 75% of ports in use	23:14
more then 50% of ports in use	50:35



4.6.1.5 Port Contention Trend by Month Report

The Port Contention Trend by Month report displays a graph that shows, by month, the total amount of time Interchange experiences 50%, 75%, and 100% *port contention,* meaning all ports are busy or in use simultaneously. (This report displays to the right of the Port Contention report.)

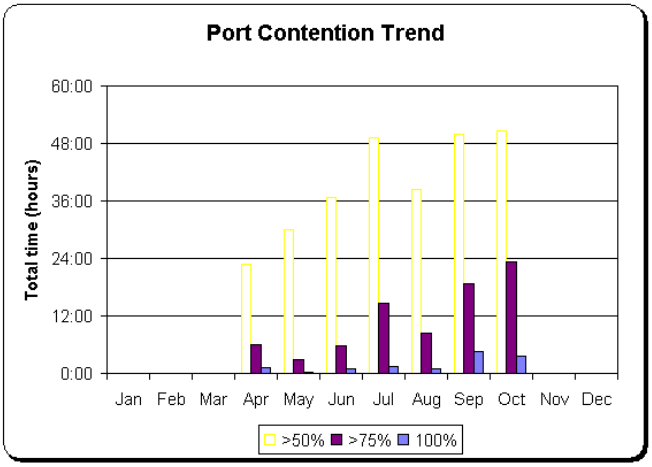
Use this report to identify *annual* traffic trends or patterns (such as seasonal peaks and valleys in call traffic, a gradual or dramatic growth pattern, etc.).

Figure 5-7 Port Contention Trend by Month Report

Sunset Travel Services, Inc.

Port Contention Trend

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
100%				1:15	0:16	0:58	1:24	0:59	4:31	3:38			13:03
>75%				6:03	2:48	5:49	14:42	8:22	18:49	23:14			79:48
>50%				22:55	30:02	36:44	49:15	38:31	49:56	50:35			277:59



4.6.1.6 Port Contention Trend by Day of Week Report

The Port Contention Trend by Month report displays, by day, the total amount of time Interchange experiences 50%, 75%, and 100% *port contention*, meaning all ports are busy or in use simultaneously. (This report displays to the right of the Port Contention Trend by Month report.)

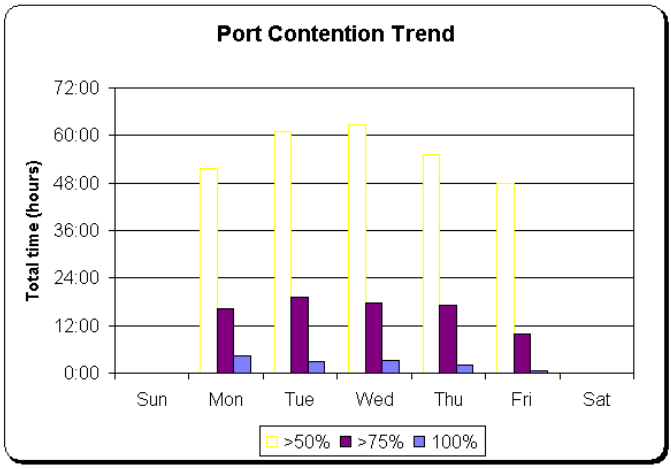
Use this report to identify *daily* traffic trends or patterns (such as which days the business generally experiences peaks and valleys in call traffic).

Figure 5-8 Port Contention Trend by Day of Week Report

Sunset Travel Services, Inc.

Port Contention Trend

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
100%	0:00	4:20	2:48	3:16	2:00	0:38	0:00	13:03
>75%	0:00	16:14	19:02	17:45	17:01	9:44	0:00	79:48
>50%	0:00	51:38	60:50	62:37	55:06	47:46	0:00	277:59



4.6.2 MAILBOX REPORTS

Mailbox reports allow you to look at information about all mailboxes on your system. There are five mailbox reports:

- Mailbox Information
- Mailbox Usage
- Message Delivery
- Login Failure
- Default Password

4.6.2.1 Mailbox Information Report

The Mailbox Information report provides *general* information about all mailboxes on the system. (Using Excel 97/98 features, you can sort the report by name, box number, or number of messages.)

Use this report to view a summary listing of all mailboxes in the system. The report can also serve as an administration and trouble-shooting tool. You can:

- compare at a glance the classes of service assigned to different users,
- confirm that a group of mailboxes has been given access to VCM or see how many more VCM licenses remain to be assigned (for example, if the total VCM users shown on the report is 48 and 50 licenses have been purchased, two licenses/seats are available),
- identify potential opportunities for freeing storage space on the hard drive (by identifying mailboxes with exceptionally large numbers of saved messages that may be able to be deleted), and
- identify old mailboxes that are no longer in use and can be deleted.

Figure 5-9 Mailbox Information Report

Sunset Travel Services, Inc.

Mailbox Information Report as of October 31, 1998

Name	Box #	Extension	Class of Service	New Messages	Old Messages	VCM User?	Last Login
Anderson, George	362	362	4	0	22	Yes	10/30/1998
Brown, Vincent	310	310	5	2	19	Yes	10/30/1998
Black, Ann	305	305	4	0	0	No	10/30/1998
Carter, Jeff	342	342	4	0	2	Yes	10/19/1998
Donaldson, Robert	348	348	5	0	16	Yes	10/29/1998
Green, Elizabeth	326	326	3	0	18	No	10/29/1998
Jones, Thomas	303	303	5	0	19	Yes	10/30/1998
...	...	...	...	...	...	...	...
O'Brien, Pat	311	311	5	1	4	Yes	10/30/1998
Sanders, Jeff	370	370	4	0	3	Yes	10/16/1998
Smith, John	340	340	5	2	13	No	10/30/1998
Thomas, Dave	321	321	5	0	13	Yes	10/30/1998
White, Shirley	302	302	5	6	49	Yes	10/30/1998
Wright, Evelyn	314	314	4	1	6	Yes	10/30/1998

	Boxes	New Messages	Old Messages	VCM User?
Total	135	89	485	48

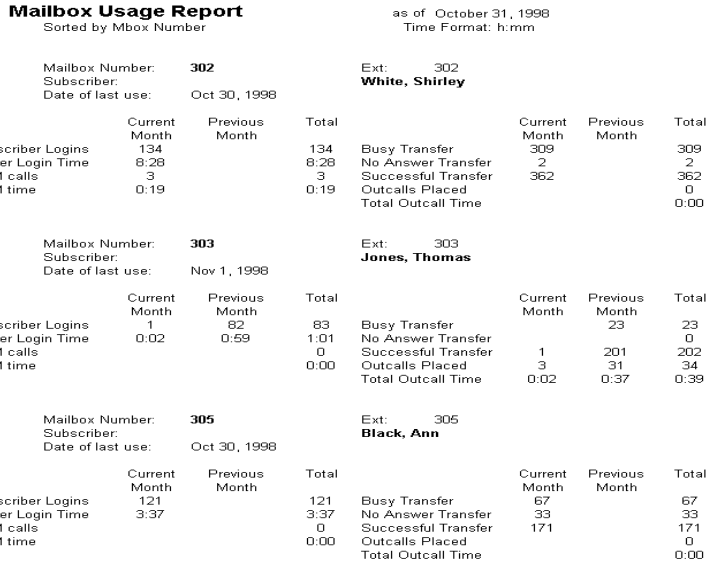
4.6.2.2 Mailbox Usage Report

The Mailbox Usage report provides *detailed* information on the use of system mailboxes for the current and previous month. (On-screen options allow you to sort the report by name or box number.)

Use this report to track specific activity on how mailbox owners are using their mailboxes. You can also compare activity for the current and previous month. Data on the report may identify mailbox owner training requirements. The report identifies:

- how frequently the mailbox owner accesses the mailbox,
- total messages received and sent by the mailbox,
- the number of faxes received and sent by the mailbox,
- who is using VCM and to what extent,
- who is using outcalling and to what extent, and
- how often calls reach voice mail and why (for example, the mailbox owner does not answer or is on the phone).

Figure 5-10 Mailbox Usage Report



Mailbox Usage Report
Sorted by Mbox Number

as of October 31, 1998
Time Format: h:mm

Mailbox Number: **302** Ext: 302
Subscriber: **White, Shirley**
Date of last use: Oct 30, 1998

	Current Month	Previous Month	Total		Current Month	Previous Month	Total
Subscriber Logins	134		134	Busy Transfer	309		309
Owner Login Time	8:28		8:28	No Answer Transfer	2		2
VCM calls	3		3	Successful Transfer	362		362
VCM time	0:19		0:19	Outcalls Placed			0
				Total Outcall Time			0:00

Mailbox Number: **303** Ext: 303
Subscriber: **Jones, Thomas**
Date of last use: Nov 1, 1998

	Current Month	Previous Month	Total		Current Month	Previous Month	Total
Subscriber Logins	1	82	83	Busy Transfer		23	23
Owner Login Time	0:02	0:59	1:01	No Answer Transfer			0
VCM calls			0	Successful Transfer	1	201	202
VCM time			0:00	Outcalls Placed	3	31	34
				Total Outcall Time	0:02	0:37	0:39

Mailbox Number: **305** Ext: 305
Subscriber: **Black, Ann**
Date of last use: Oct 30, 1998

	Current Month	Previous Month	Total		Current Month	Previous Month	Total
Subscriber Logins	121		121	Busy Transfer	67		67
Owner Login Time	3:37		3:37	No Answer Transfer	33		33
VCM calls			0	Successful Transfer	171		171
VCM time			0:00	Outcalls Placed			0
				Total Outcall Time			0:00

4.6.2.3 Message Delivery Report

The Message Delivery Report provides a summary of all message delivery events by mailbox number.

Use this report to control costs and to help secure Interchange.

Example:

Consider an employee who leaves the company. As a field technician who was on the road much of the time, the employee had his mailbox set up to deliver all his messages to his current field location (typically a long distance call). When he left the company, no one deleted his mailbox. The box still receives company-wide broadcast messages, group box messages, etc., and the messages are still being delivered to his last long distance telephone number.

You can also use this report to help identify potential system security breaches that involve the message delivery feature.

Figure 5-11 Mailbox Delivery Report

Sunset Travel Services, Inc.

Message Delivery Report

from October 1, 1998
to October 31, 1998

Name	Box #	Phone to call	Answered	Busy	No answer
Anderson, George	362	414-555-1212	19	1	14
Jones, Thomas	303	922-3800	9		6
...	...	...	...	...	...
White, Shirely	302	419-3800	41		
Wright, Evelyn	314	941-925-7278	45		

4.6.2.4 Login Failure Report

The Login Failure report provides a list of all unsuccessful login attempts to system mailboxes. An unsuccessful login attempt occurs when a caller enters a mailbox number but fails to enter the valid password.

Use this report to help identify suspected security breaches of the system.

Figure 5-12 Login Failure Report

Sunset Travel Services Inc.

Login Failure Report

from October 1, 1998
to October 31, 1998

Name	Box#	Failed Login Date	Failed Login Time
Adamson,Tom	162	10/16/98	4:38 PM
Barn,Carry	100	10/01/98	2:28 PM
Freind,Elizabeth	137	10/10/98	4:34 PM
Lemonn,Tom	124	10/11/98	9:35 PM
OBrien,Larry	120	10/11/98	7:15 AM
Olster,Bob	147	10/01/98	12:51 PM
Porter,Vince	115	10/16/98	2:14 PM
Sulster,Karen	111	10/16/98	12:12 PM
Vett,Penny	140	10/12/98	8:05 AM
Viders,Jennifer	121	10/11/98	1:45 PM
Weggly,Ellen	102	10/10/98	6:23 PM
Woodman,Bill	160	10/04/98	10:38 PM

4.6.2.5 Default Password Report

The Default Password report provides information about mailboxes whose mailbox owners have not changed their password since the mailbox was originally created or reassigned.

Use this report to identify mailboxes that pose a security risk to the company, as outside callers may gain user access to the system more easily.

Figure 5-13 Default Password Report

Sunset Travel Services, Inc.

Default Mailbox Password Report as of October 31, 1998

Name	Box #	Initial Password	Last Login
Black, Ann	305	305	10/30/1998
Donaldson, Robert	348	348	10/29/98
...	...	...	...
O'Brien, Pat	311	311	10/30/98
Sanders, Jeff	370	370	10/16/98
Total	12		

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