# MITEL NETWORKS

# 6510 Unified Messaging

Draft



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**6510 Unified Messaging Client Application User Guide** Release 1.1 November 2002

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# **Document Overview**

This guide provides detailed instructions on configuring the 6510 Unified Messaging (UM) system after you have installed the software. Detailed information is provided on modifying the PBX, creating a company, mailboxes, and feature groups. In addition, this guide also contains information on setting the different configuration parameters.

**Note:** Some screen captures in this document may not reflect the Mitel Networks<sup>™</sup> 6510 UM software exactly. All screens will be updated in the next release of the 6510 UM documentation.

# Intended Audience

This guide is intended for anyone responsible for maintaining the 6510 UM.

# Before You Begin

Before you configure the 6510 UM system, make sure that you have read the Server Installation Guide.

# Conventions

This guide contains three types of help:

- Note: contains additional information about the task you are performing
- Hint: contains an alternative method of performing the task or offers a solution if you run into a problem.

Warning: contains critical information relating to the task.

# **Contacting Mitel Networks**

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# Overview

The 6510 Unified Messaging system is an IP-based desktop application that allows you to access several unique communication features, such as Call control, instant messaging, and unified messaging.

You can log into the UM server from any PC connected to the Internet. After you enter the IP address of the UM server, you are logged in and can access all of the available communication functionality.

# Signing On

Signing on allows you to begin the UM Client Manager program.

- To log onto the UM server:
  - 1. Click Start>Programs>UM Client Manager>UM Client Manager.

# Hint: You can also double-click on the UM Client Manager icon on the desktop.

The UM Client Manager will automatically load into your system tray after authentication, and will sit awaiting call activity. The status of your UM Client Manager session is represented by four icons:

lcons	Session Status
*	Logged In
*	Logged In with New Message Awaiting
*	Logged Out
*	System detects Client Manager settings, but no connection is established

Note: When UM Client Manager is enabled, a notification window will pop up above the UM Client Manager icon whenever new messages are received. The notification window will display the number of new voice, text, and fax messages if the Show Message Count option is enabled (this is done in the Administration console. See Feature Groups>Mailbox Options in the Server Configuration Guide).

# Signing Off

Signing off closes the UM Client Manager and ends your session.

### • To sign off from LanTalk:

1. Right-click on the UM Client Manager icon and click **Exit**. The following message appears:

Mitel Net	works 6510 UM Client Manager	×
?	Are you sure you want to exit?	
	Yes No	
	l	JM0057

2. Click Yes.

# Configuring the Application

Before you can use UM Client Manager, you must configure the application. While this is normally done when the application is installed on your PC, you have the option of changing the settings.

There are four main settings to configure for the application.

- Main Settings
- Call Handling
- LanTalk (Instant messaging) Settings
- Notification Settings

# **Configuring Main Settings**

The **Main** tab allows you to change the personal settings required to log in successfully.

Caution: This information must be correct in order for UM Client Manager and the forms to work properly.

- To configure main settings:
  - 1. Click Start>Programs>UM Client Manager>Configuration. The Main dialog appears.
- Note: You can also access the Call Handling Dialog by right-clicking on the UM Client Manager icon, then selecting Options.

🚹 Mite	l Networks 6510 UM Client Mar	nager 1.105.4 Options
Main	Call Handling LanTalk Notific	ation
	Company	Mailbox 100
	UMST Server IP Address 127.0.0.1	UMST Server Port 13777
	Web Server IP Address 127.0.0.1	
	UM Client Language English	<b>_</b>
	Fax Viewer	
	J	Browse
	Set Passw	ord
	<u>D</u> k	<u>Cancel</u>
		UM0058

2. In the **Company** field, enter the company number or company name that your account is associated with on the UM.

#### Note: Ask your UM administrator for more information.

- 3. In the Mailbox field, enter your Mailbox number for voice mail.
- 4. In the **UMST Server IP Address** field, enter the UMST Server IP address so the system can authenticate you using TCP/IP.
- 5. In the UMST Server Port field, enter the UMST server port number.
- 6. In the **Web Server IP Address** field, enter the web server IP address so that the system can authenticate you.
- 7. In the **UM Client Language** drop-down list, select the language that is to be used.
- 8. In the **Fax Viewer** field, click **Browse** to view the specific fax viewer application you already have loaded on the PC, or leave the field blank for the system to use the Windows default.
- 9. Click **Change Password** if you want to change the existing password.
- 10.Click **OK** to finish the configuration, or click another tab to continue the configuration.

## Changing your Password

Your password was set when UM Client Manager was installed on your PC. However, you can change the password if you feel that it is no longer secure.

#### • To change your password:

1. Click Change Password. The Change Password dialog appears.

🐂 Change Passwor	rd 🔀
Old Password:	l
New Password	
Confirm Password:	
<u>0</u> k	Cancel

- 2. In the Old Password field, enter the existing password.
- 3. In the New Password field, enter the new password.
- 4. In the **Confirm Password** field, enter the new password again and click **OK**. The new password takes effect the next time that you start UM Client Manager.

# Specifying Call Handling Settings

The **Call Handling** tab allows you to define the call handling settings, including PIM Integration, Default Action, New Call Popup, Public Contact Search, Auto Add Record and User Extension.

#### • To specify call handling:

1. Click the Call Handling tab. The Call Handling tab appears.

🚹 Mitel Networks 6510 UN	1 Client Manager 1.	105.4 Options	? ×
Main Call Handling Lan	Talk Notification		
🔲 New Call Popup	🔽 Use Pl	hone Formatting	
PIM Integration Outlook	•		
Default Action Take Call	•		
Use Ext.			
Internal	C External	C Centrex	
Country		7	
City/Area Code			
Number			
	<u>0</u> k <u>(</u>	Cancel App	yly
			UM0059

- 2. Select **New Call Popup** to activate screen pops on incoming calls. When you receive a new call, the Call Manager screen will appear.
- 3. Select the **Use Phone Formatting** checkbox to enable phone formatting.
- 4. From the **PIM Integration** drop down list, select reverse lookups into PIM application on incoming calls for database pops.

#### Note: PIM stands for Personal Information Manager.

Function	Related Fields
Maximizer	Select <b>Auto Add record on Not Found</b> to add the call record if it isn't found in the database. This takes the caller ID information of name and number, and creates a new contact in Outlook or Act if they do not already have the record.
Goldmine	No related fields.
ACT!	Select <b>Auto Add record on Not Found</b> to add the call record if it isn't found in the database. This takes the caller ID information of name and number, and creates a new contact in Outlook or Act if they do not already have the record.
Outlook	Select <b>Auto Add record on Not Found</b> to add the call record if it isn't found in the database. This takes the caller ID information of name and number, and creates a new contact in Outlook or Act if they do not already have the record.
	Select <b>Search Public Contacts</b> to search the database for public contacts.
	Select <b>Eliminate New call Popup, if found</b> to disable the new call popup if the number is found.
Custom ACTIVEX	This allows a user with VB Script experience to integrate the screen pops and call controls into custom databases and applications.
	In the <b>ActiveX Class Name</b> field, enter the class name of the Custom ActiveX you are using.

- 5. Select the Auto Add Record on Not Found checkbox to take the caller ID information of the caller's name and number and create a new contact in Outlook if it is not found in the database. With Outlook, you can define the public folders as the database you want reverse lookups for, instead of your PST file.
- 6. Select the **Search Public Contacts** checkbox if you want the system to search the database for matching public contacts when an incoming call occurs.

- 7. Select **Eliminate New Call Popup**, **If Found** if you do not want a new call popup when a matching information is found for the incoming call by the system.
- 8. From the **Default Action** drop-down list, select a default action if you do not click on any actions on the incoming screen pop.

These default actions will be overridden by the actions you may choose on an incoming screen pop.

Action	Function
Take Call	Take the call automatically
Take Message	Take a message automatically
Transfer Call	By default, transfer the call to another extension

- 9. In the **Use Ext**. field, enter the phone extension you are currently sitting at. This extension is used to transfer a call, play back a voice message, and dial a number.
- 10. In the **Country** drop-down list, select the country that is associated with the external extension.
- 11. In the **City/Area** Code field, enter the city area code for the external extension.
- 12. In the **Number** field, enter the extension number you are using.

# Note: If you do not enter a phone extension, the system will use your extension.

13. Click **OK** to end and finish the configuration, or click another tab to continue the configuration.

# Configuring LanTalk

LanTalk is the instant messaging module of the UM that allows you to chat with other users over an IP.

#### • To configure LanTalk:

1. Click the LanTalk tab. The LanTalk dialog appears.

Mitel Networks 6510 UM Client Manager 1.105.4 Options	? ×
Main Call Handling LanTalk Notification	
Background Color       Foreground Color       Foreground Color       Font   Font Sample	
✓ LanTalk Popup ✓ New LanTalk Window for every Session	
<u>D</u> k <u>Cancel</u> <u>Apply</u>	
	0000N

- 2. Click Background Color to set the background screen.
- 3. Click Foreground Color to set the color of the text.
- 4. Click **Font** to configure font type and size.

# Note: For information on changing the color and font, refer to your Windows NT documentation.

5. Select the LanTalk Popup checkbox to turn instant messaging on.

- 6. Select the **New LanTalk Window for every Session** checkbox to indicate that a new window should be used for every new LanTalk session.
- 7. Click OK to save the LanTalk settings.

## **Configuring Notifications**

- To configure notifications:
  - 1. Click the Notificaton tab. The Notification dialog appears.

Mitel Networks 6510 UM Client Manager 1.105.4	Options	
Main Call Handling LanTalk Notification		
✓ When new messages arrive, make the icon flash		
🔽 When new messages arrive, popup notification wind	wot	
🔽 When other users log in, popup notification window		
Sounds		
New Message	Browse	
Urgent Message	Browse	
Record Beep	Browse	
New Call	Browse	
LanTalk	Browse	
Logged in User	Browse	
<u> </u>	Apply	
	UM0061	

• Select the **When new messages arrive, make the icon flash** checkbox to enable the 6510 UM Client Manager icon to flash when you receive a new message.

- Select the **When new messages arrive, popup notification window** checkbox to enable the screen popup that notifies you of incoming calls.
- Select the **When others log in, popup notification window** checkbox to enable the screen popup that notifies you of every user that logs in.
- 2. Customize the sounds you wish to use for each function by using the **Browse** button to select the appropriate sound files within the following fields:

Option	Function
New Message	Select the sound file you want played when you receive a new message.
Urgent Message	Select the sound file you want played when you receive an urgent message.
Record Beep	Select the sound file you want played for the record beep.
New Call	Select the sound file you want played when you receive a new call.
LanTalk	Select the sound file you want played when you receive a LanTalk message.
Logged in User	Select the sound file you want played when a user logs in.

3. Click **OK** to save your Notification settings.

# Note: The Notification sounds feature only supports sound files in .WAV format.

# Using the UM Call Manager

When a call comes through to your extension, the UM Client manager displays a screen pop that displays information about the phone call.

# Note: The Contacts feature and button will only appear if you set your PIM Integration Settings to use Outlook.

🖀 UM Call Manager	
(416) 926-0167	
Answer Record Transfer Hold Take Msg Recall Dial DND ON Conta	acts
Clear Delete	
	UM0062

# Using the Toolbar Buttons

There are nine buttons that allow you to perform various tasks within the eCall Manager display.

Button	Function
Answer	Transfers the call to the active extension that your user account has been defined to. For more information, refer to "Using Web Client."
Transfer	Transfers the call to another extension. Click the arrow key to define the extensions.
Hold -	Puts the incoming call on hold. Click the arrow key to select the length of time that the call will be on hold.
Take Msg	Sends the call to voice mail. Click the arrow to select what greeting to play the caller.
Recall	Allows you to pull a caller out of voice mail while they are leaving a message.
Dial	Allows you to dial back a number that left a message or called. You can go into contacts and used the dial button as well.
DND ON	This button allows you to turn your do not disturb status on or off at any time.
Contacts	This launches the embedded UM Client Manager Contact database to log call statistics and dial back. (Only functional in conjunction with Outlook).

# Answering a Call

When a call appears on the UM Call Manager display, click **Answer** to transfer the call to your extension.

Note: The Answer button is disabled until you receive another call.

## **Removing a Call**

UM Client Manager gives you the option of removing one or all of the calls on the display.

#### To remove a call:

1. Highlight the call to be removed and click **Clear**. A dialog appears, prompting you to confirm the deletion.

#### Note: To remove all calls from the display, click Clear.

2. Click OK. UM Client Manager removes the calls from the screen.

# Transferring a Call

When a call comes to your extension, you can transfer the call to another extension. After you specify the extension, it will be displayed in the Transfer drop down list and is available to use again.

# Note: The extension numbers that you enter are available until you exit UM Call Manager.

#### • To transfer a call:

 Click the arrow key to select the extension to transfer the call to. To specify an extension, click **Other**. The Transfer Call dialog appears.

Transfer Call	×
Phone Extension to Transfer	OK Cancel
I	

2. Enter the mailbox number associated to the phone extension that you want to transfer the call to and click **OK**.

Note: The Transfer button is disabled until you receive another call.

# Putting a Call on Hold

When a call comes through to your extension, you can put the call on hold until you have an opportunity to answer it.

#### • To put a call on hold:

1. Click the arrow key to select the length of time that you want to put the call on hold for. The Hold Call dialog appears.

Hold Call	×
Number of minutes to hold	ОК
	Cancel
1	

2. Enter the number of minutes that you want the call held for, then click **OK**. After the time has expired, the system will play your voice mail greeting.

#### Note: The Hold button is disabled until you receive another call.

# Taking a Message

When a call comes through to your extension, you can choose to send the call directly to your voice mail. When enabling this option from the UM Client Manager interface, you can select which pre-recorded greeting to use to greet the caller.

#### • To take a message:

1. Click the **Take Msg** arrow key and select the greeting type you want the caller to receive. The UM Call Manager sends the caller to the selected greeting to record a message.

# Pulling a Caller out of Voicemail

When a caller is in the process of leaving a message in your voice mailbox, you can choose to retrieve the caller from voicemail and speak to them directly.

### • To pull a caller out of voicemail:

1. While a caller is in a message recording session, click **Recall**. The caller is transferred to your extension.

# **Dialing a Number**

The UM Client Manager allows you to use its interface to dial outgoing calls.

## • To dial a number:

1. Click Dial. The following dialog appears:

UM Call Manager			
(416) 888-0728			
Answer Record Transfer Hold	Take Msg Recall	Dial DND OFF	
Dial			
Phone Number to Call			
· ·			
Dialer Type			
Server Dialer			
I Long Distance			
Distance			
Go			
· · · · · · · · · · · · · · · · · · ·			
- Calls			
Date & Time Directory Number	Directory Name		<b>_</b>
Today 12:10:58PM (978) 247-7682 Today 12:08:04PM (905) 760-1565			
Today 12:08:04PM [905] 760-1565 Today 12:07:40PM [978] 247-7682			
Yesterday 03:54:55 (416) 925-5141			-
Clear Delete			
Bolde			
			UMO

- 2. From the **Phone Number to Call** drop down list, select a phone number to dial. You can also enter a number manually.
- 3. From the **Dialer Type** drop down list, select a dialer type.

Dialer Type	Function
Server Dialer	Sends data to the server and the server dials to the PBX
Local Dialer	Sends data to the TAPI dialer and the TAPI dialer dials to the PBX.

- 4. Select Long Distance if it is a long distance call.
- 5. Click Go to dial.

# Specifying DND

DND (Do Not Disturb) allows you to activate a Do Not Disturb message when an incoming call appears in the popup.

- To specify do not disturb:
  - 1. Click the **Do Not Disturb** icon.

# Adding a Call to the Contact Manager

# Note: This function is only available when PIM Integration is set to Outlook.

If your PIM Integration is set to Outlook, after you answer a call, you can add information about the caller to the Microsoft Outlook Contact Manager. For more information on how to use contacts, see your Outlook guide.

# **Changing your Present Status**

UM Client Manger provides you with the ability to inform callers when you are not available to answer the phone. For example, if you are on holiday, you can instruct the system to inform a caller that you are away and the date when you will be back in the office.

For information on how to record a greeting, refer to Maintaining Greetings on page 133.

#### • To change your status:

1. Right-click the UM Client Manager icon, then select Present Status.

Status	Function
In Office	Rings your Active extension.
Busy	Goes to voice mail and plays your busy greeting.
Meeting	Goes to voice mail and plays your meeting greeting.
Do Not Disturb	Goes to voice mail and plays your do not disturb greeting.
Lunch Time	Goes to voice mail and plays that you are out to lunch.
Gone Home	Goes to voice mail and plays the gone home greeting.
Out Of Town	Goes to voice mail and tells the caller you are out of town.
Vacation	Goes to voice mail and tells the caller you are on vacation.
No Answer	Rings your active extension.

2. Select the status that you want activated.

If you select a Present Status other than **In Office** or **No Answer**, the **Available At** dialog appears.

۹,	Avai	lable	e At					×
		vailab	le At					
								4:24 PM
	4	N	ove	mber	200	1	Þ	4:24 PM
				Wed	Thu	Fri	Sat	
	28	29	30	31	1	2	3	
	4	5	6	- 7	8	9	10	
	11	12	13	14	15	16	17	
	18	19	20	ZD	22	23	24	
	25	26	27	28	29	30	1	
	2	3	4	5	6	7	8	
	0	Tod	ay: `	11/2	1/20	01		<u>C</u> ancel

- 3. Select the Available At checkbox to activate the schedule.
- 4. Click on a date when you will be back in the office.
- 5. Enter a time, then click Ok.
- Note: Once a Status is changed or defined, it will take time for the change to appear in Outlook. (Approximately one minute). If instantaneous change is needed, you must shutdown and restart Outlook, and the new Status will be activated.

# Using Lan Talk

Lan Talk is the instant messaging module that allows you to chat with other users over the IP. You can reach anyone who is logged into the same IP as the one that you are using, as well as send LAP and SMS messages.

# Sending a Message

When logged in, you can send instant messages to others using LanTalk.

#### • To send a message (to a single user):

1. Right-click on the UM Client Manager icon and select Lan Talk. UM Client Manager enables you to Launch, Broadcast, or view the Directory.



2. Click Launch. The Lan Talk dialog appears.

🔏 LanTalk					_ 🗆 ×
Clear					
					<b>A</b>
					-
Select Destination	*Select Destination	n from Lan Talk I	Directory		
		Thom Earn aix (	Silectory	1	
					iend to LAP
					iend by SMS
					iend

3. From the Select Destination drop-down list, select Select Destination from Lan Talk Directory. The Lan Talk Directory dialog appears, displaying a Buddies List compilation or a list of all users online, defining their name, mailbox number, and online status.

Buddies Li	st Comp	any Directory	
Mailbox Number	First Name	Last Name	Status
<b>300</b>	RECEPTION	OPERATOR	In Office
🙀 310	Mohammad	Nezarati	Vacation
🙀 312	Leah	Druskin	In Office
🙀 313	John	Biancucci	Out of Town
🖓 314	Davide	Petramala	In Office
👸 315	Linda	Ferrari	In Office
👸 316			In Office
🖓 317	Main	Boardroom	In Office
🖓 318	Darrell	Hensley	In Office
🖓 319	AMANDA	ARMSTRONG	In Office
<b>i 3</b> 20	Elizabeth	Moore	In Office
<b>i 3</b> 21	Merv	Duke	In Office
🛞 322	Troy	Matthews	Do not Disturb
<b>i 3</b> 23	Malcolm	Concannon	In Office
🛞 324	Karen	Birkum	In Office
8 325	Eddie	Duke	In Office
<b>i 🎒</b> 326	Mehdi	Nezarati	In Office
🍑 327	Arno	Ermarkaryan	Meeting
<b>i 3</b> 28	Ladislav	Rosulek	In Office

- 4. Click the **Company Directory** tab, select a user, and click **OK**. The selected user appears in the Select Destination drop-down list.
- Note: The LanTalk Directory can also be accessed directly if you right-click on the UM Client Manager icon, select LanTalk and click Directory.
  - 5. Select the Also Send to LAP checkbox to send to a pager (if applicable).
  - 6. Select the Also Send to SMS checkbox to send to a mobile phone (if applicable).
  - 7. In the empty field, enter the message that you want to send.

💪 LanTalk		<u>- 🗆 ×</u>
Clear		
		-
Select Destination Broadcast		
		<u> </u>
Hi, can you please do some work?		Also Send to LAP
		Also Send by SMS
		Send

### Note: You can also select a previous message that you sent.

8. Click Send to send the message. The message is sent.

# Creating a Broadcast Message

Using the Broadcast Message feature is useful if you want to send the same message to everyone connected to the system.

### • To create a broadcast message:

 Right-click on the UM Client Manager icon and select Lan Talk>Broadcast. The Lan Talk dialog appears.



😅 LanTalk	
Clear	
	<u> </u>
	<b>v</b>
Select Destination Broadcast	•
good morning everyone!	Also Send to LAP
	Also Send by SMS
	Send

- 2. In the Select Destination drop-down list, select Broadcast.
- 3. In the empty field, enter the message that you want to send.

# Note: You can also Send to LAP or Send by SMS, but as a Broadcast message, it is not recommended.

4. Click Send. The message is broadcasted.

# Creating a Buddies List

A Buddies List allows you to create a distribution list for Lan Talk broadcasts. After creating a Buddies List, you must add mailboxes (users) to the list. By creating and defining users on a Buddies List, you can send a broadcast message to the selected "buddies" with one click.

### • To create a Buddies List:

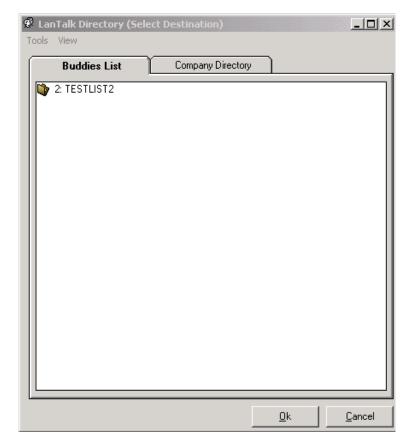
 Right-click on the UM Client Manager icon and select Lan Talk>Directory. The Lan Talk Directory (Buddies List tab) appears.

LanTalk Directory (S	elect Destination)		<u>-                                    </u>
Buddies List	Company Directory	$\neg$	
		<u>0</u> k	<u>C</u> ancel

2. Click Tools>Add Buddies List. The Add Buddies List dialog appears.

Add Buddies List		
List Number 2		
List Name Te	stList2	
Please note that be unique.	List Number and List f	Name must
<u>0</u> k	Can	cel

- 3. In the List Number field, enter the list number that will identify the Buddies List.
- 4. In the List Name field, enter a unique name for the Buddies List.
- 5. Click **OK**. The Buddies List appears in the Buddies List tab.



### • To rename a Buddies List:

- In the Buddies List tab, select a Buddies List and click Tools>Rename Buddies List. The Delete Buddies List dialog appears.
- 2. Click Yes. The Rename Buddies List dialog appears.

Rename Buddies List	×
Enter new name	OK Cancel
newnameforlist	

- 3. In the **Enter new name** field, enter the new name for the Buddies List.
- 4. Click **OK**. The Buddies List appears, labelled with its new name.

### • To add mailboxes to the Buddies List:

1. In the Buddies List tab, select the Buddies List and click **Tools>Add Mailbox**. The Add Mailbox dialog appears.

A	dd Mailbox				2	×
	Search for a Mailbox By Mailbox Number	C By Name			Search	
	Mailbox Number 201				Add to List	
					<u>C</u> ancel	
	Mailbox Number	First Name	Last Nar	me		
	201	Eddie	Lopez			
_	1					
1	Mailbox(es) Found					//.

You can either add mailboxes by searching for the mailbox number or by user name:

- Select By Mailbox Number.
- In the **Mailbox Number** field, enter the mailbox number to search for.

- Click **Search**. Any mailbox number that is found is displayed.
- or
- Select **By Name**. The Last Name and First Name fields appear.

Ac	ld Mailbox				×	3
	- Search for a Mailbox	By Name			Search	
	Last Name duke			A	dd to List	
	First Name eddie				<u>C</u> ancel	
	Mailbox Number	First Name	Last Name			
	102	Eddie	Duke			
1	Mailbox(es) Found					1

- In the **Last Name** field, enter the last name of the user you are searching for.
- In the **First Name** field, enter the first name of the user you are searching for.
- Click **Search**. Any name that is found is displayed.
- 2. Select the user that you want to add and click **Add to List**. The user appears in the Buddies List.



3. Repeat steps 1-2 to add all necessary users to your Buddies List.

# **Deleting Buddies Lists and Mailboxes**

You can delete individual mailboxes from Buddies Lists or delete entire Buddies Lists.

### • To delete a mailbox from a Buddies List:

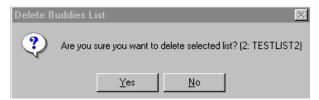
1. In the Buddies List tab, select a user and click **Tools**>**Delete Mailbox**. The Delete Mailbox dialog appears.



2. Click Yes. The mailbox is removed from the Buddies List.

### • To delete a Buddies List:

1. In the Buddies List tab, select a Buddies List and click **Tools**>**Delete Buddies List**. The Delete Buddies List dialog appears.



2. Click Yes. The Buddies List is removed.

# Sending a Message Using a Buddies List

Once a Buddies List is created and multiple users are assigned to it, you can conveniently create Lan Talk messages that are sent to users specific to the Buddies List that is selected.

### • Sending a message using a Buddies List:

 Right-click on the UM Client Manager icon and select Lan Talk>Directory. The Lan Talk Directory (Buddies List tab) appears.



📽 LanTalk Directory (Select Destination)		_ 🗆 🗵
Tools View		
Buddies List Company Directo	w )	
2: TESTLIST2		
	<u>0</u> k	<u>C</u> ancel

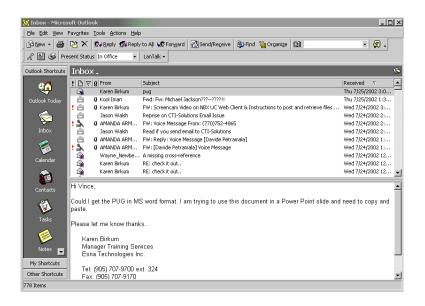
- 2. Select the Buddies List to use and click **OK**. The Select Destination field displays the selected Buddies List.
- 3. In the empty field, enter the message that you want to send.
- 4. Select the **Also Send to LAP** checkbox to send to a pager (if applicable).
- 5. Select the **Also Send to SMS** checkbox to send to a mobile phone (if applicable).
- 6. Click **Send** to send the message. The message is sent to all users that are defined in your Buddies List.

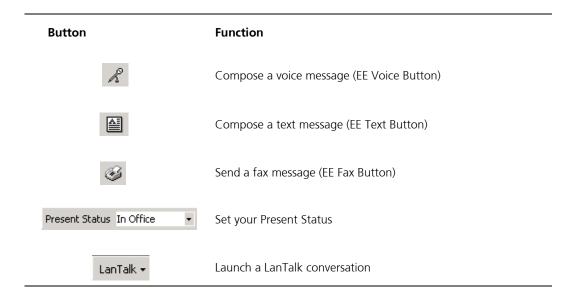
# Using the UM Client Manager Toolbar (In Outlook)

The UM Client Manager Toolbar is integrated into the Microsoft Outlook application, allowing you to send a voice, text, or fax message, as well as set your Present Status and launch LanTalk sessions.

# Note: In cases where there are multiple Profiles being used on the same Outlook application, only the profile of the user who installs the software has access to the UM Client Manager Toolbar in Outlook.







# Message Tab

The Message tab allows you to compose voice, text and fax messages.

### • To compose a voice message:

1. In Microsoft Outlook, click the **EE Voice** button. The EE Voice Message tab appears.

Message	Telephony Options	
То		-
<u>C</u> c		
Subject:		
<b>1</b>		
- Choose	a Message Type	
Voice	e C Fax C Text	
	A	

- 2. In the **To** field, enter the e-mail address that you are sending the message to.
- 3. In the **Cc** field, enter the e-mail address that you are carbon copying the message to. (If applicable).
- 4. In the **Subject** field, enter the subject for the message.
- 5. Under Choose Message Type, ensure that Voice is selected.

The sound recording toolbar is used to record and playback voice messages. There are buttons to record, clear, play, stop, rewind, and fast forward the message.





allows you to adjust the message volume and speed.

- Click 

   and begin recording the voice message with your microphone. Click 
   when finished recording.
- 7. Click **>** to verify that you message is recorded. If the message

needs to be revised, click 🙀 to clear the message and re-record your message.

- 8. In the text field at the bottom of the screen, enter any text that you want included with the message.
- 9. Click Send. The composed message is sent.

### • To compose a text message:

1. In Microsoft Outlook, click the **EE Text** button. The EE Text Message tab appears.

Message	Telephony Options	
То		-
<u>C</u> c		
Subject:		
Choose C Voice	Message Type	
	<u> </u>	

- 2. In the **To** field, enter the e-mail address that you are sending the message to.
- 3. In the **Cc** field, enter the e-mail address that you are carbon copying the message to. (If applicable).
- 4. In the **Subject** field, enter the subject for the message.
- 5. Under Choose Message Type, ensure that Text is selected.
- 6. In the text field at the bottom of the screen, enter your message.
- 7. Click Send. The composed message is sent.

### • To compose a fax message:

1. In Microsoft Outlook, click the **EE Fax** button. The EE Fax Message tab appears.

Message Telephony Options
To
<u></u>
Subject:
Choose Message Type
C Voice © Fax C Text
S VOICE VE PAX C TEXL
-
Add Attachments Delete Attachments

- 2. In the **To** field, enter the e-mail address that you are sending the message to.
- 3. In the **Cc** field, enter the e-mail address that you are carbon copying the message to. (If applicable).
- 4. In the **Subject** field, enter the subject for the message.
- 5. Under Choose Message Type, ensure that Fax is selected.
- 6. Click Add Attachments. The Open dialog appears.

7. Select the fax to attach to the message. The selected file appears in the field.

Message Telephony Options	• lext	
C:\Your Fax Mail 4396.TIF		
Add Attachments	Delete Attachments	
Your Fax Mail	<u>×</u>	
4396.TIF	<b>•</b>	-

- 8. In the text field at the bottom of the screen, enter any text that you want included with the message.
- 9. Click Send. The composed message is sent.

# **Telephony Options Tab**

The Telephony Options tab allows you to configure the voice format and device options. Correctly configuring these options will allow you to listen to voice messages that are received.

### To set telephony options:

- 1. In Microsoft Outlook, click the **EE Voice** button. The EE Voice Message tab appears.
- 2. Click the **Telephony Options** tab. The Telephony Options tab appears.

Message Telephony Options	
Voice Format Dialogic 4-bit (ADPCM 8kHz)	
Device Options	
Sound Device Sound Card	
Apply	

- 3. In the **Voice Format** drop-down list, select the voice file format to use for playback.
- 4. In the Sound Device drop-down list, select Sound Card to listen to voice messages through the sound card on your desktop and click Apply. Or, select Phone to listen to voice messages through your telephone. If Phone is selected, the Phone Extension field appears.

Message Telephony Options
Voice Format Dialogic 4-bit (ADPCM 8kHz)
Device Options
Sound Device Phone
Phone Extension 358
Apply

- 5. Enter your phone extension and click **Apply**. Once this is selected, when a voice message is received and opened in Outlook, the system will call your telephone extension and the voice message will be played on your telephone.
- 6. Telephony Options are now configured.
- Note: Voice messages recorded through a microphone on a desktop cannot be played through the Phone sound device. It can only be played through the Sound Card sound device.

# Setting Present Status in Outlook

UM Client Manger provides you with the ability to inform callers when you are not available to answer the phone. For example, if you are on holiday, you can instruct the system to inform a caller that you are away and the date when you will be back in the office.

# • To set present status in Outlook:

1. In the UM Client Manager Status Toolbar (Outlook), click the Present Status drop-down list and select a status.

Status	Function
In Office	Rings your Active extension.
Busy	Goes to voice mail and plays your busy greeting.
Meeting	Goes to voice mail and plays your meeting greeting.
Do Not Disturb	Goes to voice mail and plays your do not disturb greeting.
Lunch Time	Goes to voice mail and plays that you are out to lunch.
Gone Home	Goes to voice mail and plays the gone home greeting.
Out Of Town	Goes to voice mail and tells the caller you are out of town.
Vacation	Goes to voice mail and tells the caller you are on vacation.
No Answer	Rings your active extension.

2. Your Present Status is set.

# Using LanTalk in Outlook

LanTalk is the instant messaging module that allows you to chat with other users over the IP. You can reach anyone who is logged into the same IP as the one that you are using. Integrated into Outlook, LanTalk is much more convenient for you to use to communicate with individuals logged into your network.

### To use LanTalk in Outlook:

- 1. In the UM Client Manager Status Toolbar (Outlook), click LanTalk and select Launch, Broadcast, or Directory.
  - To Launch a message, refer to To send a message (to a single user): on page 34
  - To Broadcast a message, refer to To create a broadcast message: on page 38
  - To use the Directory, refer to below.
- 2. Click **Directory**. The LanTalk Directory (Select Destination) dialog appears.
- 3. Highlight a user and click **OK**. The LanTalk/LAP dialog displays the user's information.
- 4. From the **Send Text** drop- list, enter the message that you want to send.

#### Note: You can also select a previous message that you sent.

- 5. Click **Send** to send the message.
- 6. Click **Clear** to clear the current conversation off of your IM screen.

# In This Chapter . . .

Overview on page 62 Ensuring SSL Requirement for Web Client on page 64 Starting Web Client on page 64 Using the Scroll Buttons on page 66 Using the Inbox on page 67 Playing a Voice Message on page 70 Viewing a Fax on page 72 Reading an E-mail on page 73 Composing a Message on page 74 Maintaining Folders on page 83 Maintaining the User Settings on page 89 Maintaining a Distribution List on page 118 Maintaining Greetings on page 133 Collaborate on page 138

# **Overview**

Web Client is a web-based interface that provides you with access to your 6510 UM account and features over the Internet. You can check your e-mails, phone messages, and faxes from anywhere in the world.

# Enabling SSL for Web Client

Before using Web Client, it is recommended that you enable SSL on the Web Client website to ensure that the connection will be secure. Digital certificates encrypt data using Secure Sockets Layer (SSL) technology, the industry-standard method for protecting web communications. The SSL security protocol provides data encryption, server authentication, message integrity, and optional client authentication for a TCP/IP connection. SSL is built into all major browsers and web serversand by simply installing a digital certificate turns on their SSL capabilities.

# • To enable SSL for Web Client:

- 1. In ISS 5.0, right-click the Web Client website and select Properties.
- 2. In the Directory Security tab, click Edit Secure Communications.
- 3. Click Server Certificate. The Server Certificate wizard appears.
- 4. Click Next, select Create A New Certificate and then click Next.
- 5. Select Prepare the request no but send it later option and click Next.
- 6. Enter a name for the certificate and click Next.
- 7. Enter your Country, State/Province and City Locality and click Next.
- 8. Enter the file name for the request to be saved in and click **Next**. A summary of the information you have entered will be displayed.
- 9. Verify that the information displayed is correct and click Next.

After completing the Server Certificate wizard, a private and public key for the certificate request will be created. A certificate holds your name, your public key and any other information, all of which are signed by a Certification Authority (CA) using a private key and intergrity algorithm. The Private key will stay in your computer while the Public key will be sent to a CA.

# Note: For this example, the CA *Verisign* is used and only the trial version method is illustrated. It is recommended that you apply for a commercial certificate once you have decided on the CA that best suits your needs.

- 10. In your web browser, go to www.verisign.com.
- 11. In the *Verisign* website, click **Get Trial SSL ID**. You will be prompted to enter your information.
- 12. When prompted for CSR (Certificate Signing Request), open the request file that you saved in step 8 and copy and paste the contents of the request file in the space provided by *Verisign*. Verisign will e-mail the test Server-side certificate to the address you have specified.

# Note: Begin copying the request file from the line "Begin New Certificate Request".

- 13. To ensure that the certificate you receive is Base64 encoded, create an empty file with the extensions ".cer" and copy and paste the contents that appear between the lines "Begin Certificate" and "End Certificate".
- 14. In IIS 5.0, click the Properties/Directory Security tab.
- 15. Click Edit Secure Communications and then click Server Certificate.
- 16. Select **Process** the pending request and install the certificate and click **Next**.
- 17. Select the filename for you created from the certificate that *Verisign* issued to you (in .cer format) and click **Next**.
- 18. Verify that the certificate overview information is correct and click **Next**.
- 19. Click Finish. Your web server certificate is installed for Web Client.

# Ensuring SSL Requirement for Web Client

Sometimes your URLs will be changed back to HTTP and you will be making regular, non-secure HTTP connections. To ensure that your server will require an SSL connection for your web service at all times, you need to specify that SSL is required on the virtual directory your service is located in.

# • To ensure SSL requirement:

- 1. In the IIS 5.0 Manager, right-click the UM/Web Client virtual directory and click **Properties**.
- 2. In the Directory Security tab, click Edit Secure Communications.
- 3. Select Require SSL.

# Starting Web Client

In order to access your 6510 UM account over the Internet, you must first start the Web Client.

# To start Web Client:

- 1. Open your browser (using Microsoft Explorer 6.0 or greater or Netscape Navigator 6.2 or greater). The Web Client screen appears.
- 2. In the Address field, enter the IP address of the UM server and click Go.

### Note: If you do not know the proper IP address, contact your Network Administrator.

- 3. Click Web Client. The Web Client dialog appears.
- 4. Select a language interface from the selection on the left hand side.

### Note: The default is English.

- 5. In the Mailbox field, enter your mailbox number.
- 6. From the **Company** drop down list, select a company (if there are multiple companies in the UM system).

7. In the **Password** field, enter your password and click **Login**. The Top\Inbox\ screen appears.

۵	📄 😥 🐙 👔 📴	12 🍕	1	÷.	🔍 🗈 🖗	6 6	H	< Page 1	of 1  ▶	
Inbox	Top\Inbox\								Show All	•
۵	Mailbox - Ray Gr	(18 Iter	3 🗅	0	From			Subject	Length/Size	Received
Folders	lnbox		4		· · ·	Geramikho		yeryer	3.5 sec	,
<i>6</i>			•			Geramikho		test		October 1, 2(
<b>2</b> 2	Deleted Items		Ð			Geramikho		test case	8.2 sec	
User Settings	0		4		· · · ·	Geramikho		FW: asdasadf	34.2 sec	
2			Ð			Geramikho		tset		September 2
Distribution List			4			Geramikho		test		September 2
			Ð		· · ·	Geramikho		asdasadf		
Ť			•			Geramikho		FW: 1111		September 2
Notification			4			Geramikho		FW: 1111		September 2
•			•		· · ·	Geramikho		FW: 1111		September 2
<b>89</b>			4			Geramikho		FW: 1111 d		September 2
Wakeup Call			•			Geramikho		FW: 1111		September 2
			4		· · ·	Geramikho		FW: 1111 c	22.5 sec	September 2
1			Ð			Geramikho		FW: 1111 b		September 2
Greetings			4			Geramikho		FW: 1111	9.1 sec	September 2
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			Ø			Geramikho		test		September 2
Collaborate			Ð		338: Ray	Geramikho	sh	1111	11.8 sec	September 2
Dog Off										
		•								Þ

# Logging Off

After finishing the Web Client session, you must log off.

- To log off:
  - 1. Click Log Off. A message appears prompting you to confirm log off action.
  - 2. Click OK. The Web Client screen appears.

# Using the Scroll Buttons

Scroll buttons allow you to scroll through the display of messages.

Button	Name	Function
I	First Record	Scrolls to the first record
•	Previous Record	Scrolls to the previous record
•	Next Record	Scrolls to the next record
H	Last Record	Scrolls to the last record

Note: Scroll buttons appear in both the Inbox and Folders applications.

# Using the Main Toolbar Functions

The left hand side of the screen displays the main toolbar functions.

Toolbar Function	Name	Purpose
	Inbox	Displays all of your messages
<b></b>	Folders	Displays your folders
ø	User Settings	Configure your user properties
я́ <sup>с</sup>	Distribution List	Create and edit your distribution lists
	Notification	Sets up and configures notification properties on new messages

	Wakeup Call	Setup and configure a wakeup call
A	Greetings	Record and edit greetings
	Log Off	Log off of Web Client

# Using the Inbox

The Inbox displays all of the voicemails, faxes, and e-mails that have been sent to your mailbox.

# Message Icons

There are seven message icons used to represent information about each message in the Inbox.

lcon	Name	Function
<b>(</b> ):	Voice	Indicates a voice message that you have not listened to
<b>(</b> )	Voice	Indicates a voice message that you have listened to
X	E-mail	Indicates an e-mail that you have not read
	E-mail	Indicates an e-mail that you have read
ý	Fax	Indicates a fax message
1	Importance	Indicates the importance of the message
E.	Private / Certified	Indicates that the message cannot be forwarded to another user. The icon also indicates that you will receive a message in your Inbox when the recipient has listened to your voice message.

# Displaying Messages by Type

You can display the messages in any folder either by type or all messages together. The default is Show All.

Top\In	bc	×\					Show Email Messages 🗷
È.	8	Item(s))					
🛱 Inbox	P	100	0	From	Subject	Length/Size	Received
		<b>R</b>		358: THORNTON, CHRIS		0 byte	November 22, 2001 5:41 F
		! 🖂		358: THORNTON, CHRIS	<b>Certified Reply Message</b>	S byte	November 22, 2001 5:41 P
		1000	0	358: THORNTON, CHRIS	Expense Report	12.7 MB	November 22, 2001 5:41 PM
				358: THORNTON, CHRIS		0 byte	November 22, 2001 5:43
				358: THORNTON, CHRIS	Certified Reply Message	0 byte	November 22, 2001 5:44 1
		<b>F</b>	0	358: THORNTON, CHRIS	Performance Report	12.7 MB	November 23, 2001 10:48
		1000	0	358: THORNTON, CHRIS	test	76.3 KB	November 23, 2001 10:53 AM

# Using the Toolbar Buttons

There are nine buttons that allow you to perform various tasks within the Inbox.

Button	Name	Function
P	Compose new message	Compose a new voice message, e-mail, or fax
24	Reply	Reply to the message
<b>\$</b>	Forward	Forward the message to another user.
¢	Refresh	Refresh the display
1	Copy marked items	Copy a marked item
	Move marked items	Move a marked item
<u>R</u>	Delete marked items	Delete a marked item

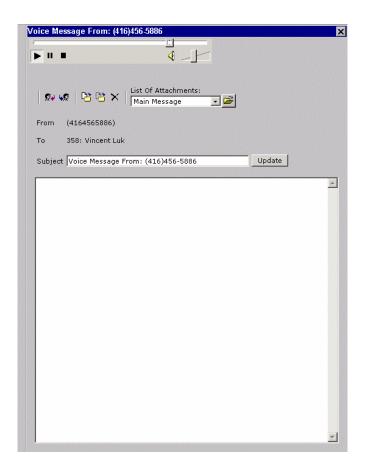
>	Add	Add a recipient
<	Remove	Remove a recipient

# Playing a Voice Message

Using Web Client, you can play back any voice mail message that has been sent to your mailbox. If there are any attachments to the voice message, Web Client will download the files to your PC.

### • To play a voice message:

1. In your **Inbox**, click the icon beside the voice message that you want to hear. The Voice Message From dialog appears.



The Windows Sound Player becomes active and plays the message automatically.

- 2. From the List of Attachments drop down list, select an attachment, then click Open. The Save As dialog appears.
- 3. Select a directory to save the file to, then click **Save**. When the download is complete, click **Close**.
- 4. To return to the Inbox, close the window.

# Correcting a Voice Message Play Error

Due to a known sound card driver problem specific to certain sound cards, the applet may crash if the Playback Speed bar is dragged when playing a message in Web Client. If this error occurs, the error can be corrected.

## • To correct a voice message play error:

- 1. In your Windows Desktop, click **Start>Settings>Control Panel**. The Control Panel window appears.
- 2. Double-click the **Sounds and Multimedia** icon. The Sounds and Multimedia Properties dialog appears.
- 3. Click the **Audio** tab and under the **Sound Playback** box, click the **Advanced** button. The Advanced Audio Properties dialog appears.
- 4. Click the **Performance** tab. The Performance tab appears.
- 5. In the **Hardware Acceleration** section, drag the bar to **None** and click **OK**. The Sounds and Multimedia Properties dialog appears.
- 6. Under the **Sound Recording** box, click the **Advanced** button. The Advanced Audio Properties dialog appears.
- 7. Repeat step 5 above and click OK.
- 8. Close all browser windows and restart Web Client.

# Viewing a Fax

If you have Fax Client installed on your PC, you can view any fax that has been sent to your mailbox.

## • To view a fax:

- 1. In your **Inbox**, click the **Fax** icon. The fax message appears.
- 2. Select the fax from the **List of Attachments** drop-down list if the fax is an attachment in the message. The fax message appears.

# Reading an E-mail

Web Client gives you the ability to read your e-mails either in the office or from any where in the world.

### • To read an e-mail:

1. In your Inbox, click the E-mail icon. The following dialog appears.

▶ II ■   \$24 \$\$\$   \$25 \$25 ×   ∐ist	<b>∢</b> _]∕			
	Of Attachments: in Message	- 2		
From Lilymuriel@aol.com				
To 358: Vincent Luk				
Subject what i bot		Upo	late	
				<u> </u>

- 2. From the List of Attachments drop down list, select an attachment, and click Open. The Save As dialog appears.
- 3. Select a directory to save the file to, then click **Save**. When the download is complete, click **Close**.
- 4. To return to the Inbox, close the window.

# Refreshing the Display

Web Client refreshes the display automatically so that the most recent messages always appear in your Inbox. However, you can also refresh the display manually by clicking **Refresh**.

# Composing a Message

Web Client gives you the ability to compose one of three types of messages: Voice, Text, or Fax. The message can then be sent to the following types of users:

- UM
- VPIM
- AMIS
- E-mail

In addition, you can also send the mail to a Distribution list

# Creating a Voice Message

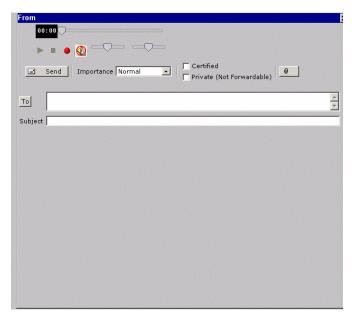
If you have a microphone attached to your PC, you can use Web Client to send a voice message.

#### To create a voice message:

1. In your **Inbox**, click **Compose new message**. The Compose New Message dialog appears.



2. Select Voice and click OK. The From dialog appears.



- 3. From the **Importance** drop down list, select **Normal** or **High** (**Urgent**) to specify the importance of the voice message.
- 4. Select **Certified** if you want to receive a message that the recipient has listened to your voice message.
- 5. Select **Private (Not Forwardable)** to prevent the receiver from forwarding the voice mail message to another user.
- 6. Click **Attachments** if you want to attach a file to the voice message.
- 7. Click **To** to specify the recipients. The To dialog appears.

Note: You can also enter the recipient's extension.

🎒 To Microsoft Internet Explorer				L 🗆 🖂
Mailboxes 477: Internet, Dialup 500: , 501: Demo1, UM 502: Demo2, UM 503: Demo3, UM 602: Brugge, Marco 712: LEAH, HOME 714: DAVES, CELL 715: DEMO MAILBOX, 740: RESOURCES, HUMAN 742: MAILBOX, SICK 750: , JOHN	>	Recipients		
Remote Sites          1: Esna Technologies         2: VPIM local ( Laco )         3: Esnatech3COM         4: NBX				
Email		ок	Cancel	

- 8. Highlight a recipient, then click the **Add** arrow. When you have finished adding all of the recipients, click **OK**. The From dialog appears.
- 9. In the Subject field, enter the subject of the voice message.
- 10. Click **Record** to record the voice message. Click **Stop** when you have finished recording. Click **Play** to review the voice message.
- 11. Click Send.

Web Client keeps a copy of your voice message in the Sent folder.

## Creating a Text Message

You can use Web Client to create a text message.

Note: There is no limit to the length of the text message.

#### • To create a text message:

- 1. In your **Inbox**, click **Compose New Message**. The Compose New Message dialog appears.
- 2. Select Text, then click OK. The From dialog appears.

From - Microsoft Internet Explorer	
Send Importance Normal   Certified  Private (Not Forwardable)	
<u>To</u>	N N
Subject	*
	z

- 3. From the **Importance** drop down list, select **Normal** or **High** (Urgent) to specify the importance of the text message.
- 4. Select **Certified** if you want to receive a message in your Inbox that the recipient has read your text message.
- 5. Select **Private (Not Forwardable)** to prevent the receiver from forwarding the text mail message to another user.

- 6. Click Attachments if you want to attach a file to the text message.
- 7. Click To to specify the recipients. The To dialog appears.
- 8. Highlight a recipient and click the **Add** arrow. When you have finished adding all of the recipients, click **OK**.
- 9. Enter the text message and click Send.

Web Client keeps a copy of your voice message in the Sent folder.

### Creating a Fax Message

You can create fax messages to send to your contacts.

#### • To create a fax message:

- 1. Click **Compose New Message**. The Compose New Message dialog appears.
- 2. Select Fax and click OK. The Fax dialog appears.

From - Micros	oft Internet Explorer		i i i i
Send	Importance Normal	Certified	) 0
то			A N
Subject			
Fax File			Browse

- 3. From the **Importance** drop down list, select **Normal** or **High** (**Urgent**) to indicate the importance of the message.
- 4. Select **Certified** if you want to receive a message in your Inbox that the recipient has read your message.
- 5. Select **Private (Not Forwardable)** to prevent the receiver from forwarding the message to another user.
- 6. Click Attachments if you want to attach a file to the message.
- 7. Click **To** to attach recipients to the fax. The To dialog appears.

- 8. Highlight a recipient and click the **Add** arrow. When you have finished adding all of the recipients, click **OK**. The From dialog appears.
- 9. In the Subject field, enter the subject of the fax.

10. In the Fax File field, enter the file you want to send and click Send.

11. Web Client keeps a copy of your voice message in the Sent folder.

### Adding an Attachment to a Message

Web Client allows you to add one or more attachments to your voice, text, or fax message.

#### To add an attachment:

1. While composing any type of message in the From dialog, click

Attachments . The Attachments dialog appears.

Attach File			Browse
	Add	Remove	
ist Of Attachmen	ts:		

2. In the **Attach File** field, enter the directory and name of the file and click **Add**.

#### Note: Click Browse to navigate to a directory.

3. Highlight the file, then click **Remove** to remove the file.

- 4. Click Clear All to remove all of the attached files.
- 5. Repeat step 2 to add another file, or click **OK** to return to the From dialog.

## Replying to a Message

After you have read a message, you can reply to the sender with a comment using Voice, Text, or Fax. You can also forward a copy of the message to another user and include your comments.

#### • To reply to a message:

1. To reply to a message from the Inbox, select the check box beside it and click **Reply**.

#### Note: You can only reply to one message at a time.

2. If you are reading the e-mail, listening to a voice message, or viewing a fax, click **Reply**. The Reply dialog appears.

🚰 Reply - Micro	soft In <mark>_ 🗆 ×</mark>
⊙ Voice ⊂ Text ⊂ Fax	OK Cancel

- 3. Select the method that you want to use to reply to the message and click **OK**. Depending on the reply method you selected, the appropriate dialog appears.
- 4. Complete the dialog and click **Send**. Web Client puts a copy of the message to each user in your Sent folder.

## Forwarding a Message

You can forward a message either from the Inbox or while you are reading it.

#### • To forward a message:

1. Select the check box beside the message that you want to forward, then click **Forward**.

#### Note: You can only forward one message at a time.

- 2. If you are reading the e-mail, listening to a voice message, or viewing a fax, click **Forward**. The Forward dialog appears.
- 3. Select **Add Comment** if you want to add a comment and click **OK**. The Voice, Text, and Fax options become active.
- 4. Select the method that you want to use to reply to the message and click **OK**. Depending on the reply method you selected, the appropriate dialog appears.
- 5. Complete the dialog and click **Forward**. Web Client puts a copy of the forwarded message to each user in your Sent folder.

#### Copying a Message

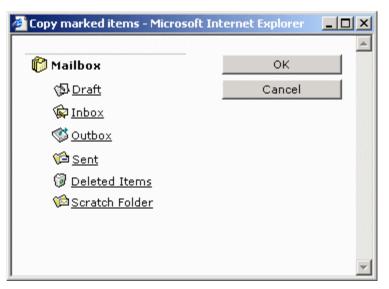
Web Client allows you to copy one or more messages and store them in another folder. This is useful if you would like to have copies of your messages stored in more than one folder.

You can copy messages either from the Inbox (if you want to copy more than one), or after you have read it.

#### To copy one or more messages:

- 1. Select the folder containing the messages that you want to copy.
- 2. Beside each message, select its check box, then click **Copy marked items**. If you are reading the message, click **Copy to another folder**. The Copy marked items dialog appears.

Using the Web Client



3. Select the folder to copy the messages to, then click **OK**. The folder that you copied the messages to appears on the desktop. The folder that you copied the messages from still contains the original messages that you copied.

### Moving a Message

Web Client allows you to move one or more messages from one folder to another. This is useful if you want to sort your messages by sender or subject.

#### • To move one or more messages:

- 1. Select the folder containing the messages that you want to move.
- 2. Beside each message, select its check box, then click **Move marked items**. If you are reading the message, click **Move to another folder**. The Copy marked items dialog appears.

Using the Web Client

🚰 Move marked items - Microsoft	Internet Explorer	<u>- 0 ×</u>
🍘 Mailbox	ок	
Draft	Cancel	
Dinbox		
🔇 <u>Outbox</u>		
🗯 <u>Sent</u>		
🖗 <u>Deleted Items</u>		
🖗 <u>Scratch Folder</u>		
		-

3. Select the folder to move the messages to, then click **OK**. The folder that you moved the messages to appears on the desktop

## Deleting a Message

Once you have read a message, you can delete it from its folder.

- To delete one or more message:
  - 1. Select the folder containing the messages that you want to delete.
  - 2. Beside each message, select its check box, then click **Delete marked items**. If you are reading the message, click **Delete**.

Web Client removes the messages from the folder and puts them into the Deleted Items folder.

## **Maintaining Folders**

You can create an unlimited number of folders to help organize your voice messages, e-mails, and faxes.

## Using the Toolbar Buttons

There are six buttons that allow you to perform various tasks within the Folders application.

Button	Name	Function
Ċ	Create a new folder	Creates a new folder
	Delete the current folder	Deletes the current folder
	Rename the current folder	Renames the current folder
6	Copy the current folder	Copies the current folder
6	Move the current folder	Moves the current folder
0	Empty Deleted Folder	Removes the contents of the Deleted folder

## Creating a New Folder

You can create a new folder to be at the same level as the default folders or to be a sub-folder.

Note: If you want the new folder to be a sub-folder, select the parent folder first.

#### • To create a new folder:

1. Click Create a new folder. The New Folder dialog appears.

New Folder - Microsoft Internet Explorer	
Enter the name of the folder you want to proste	ок
Enter the name of the folder you want to create.	Cancel
New Folder	

2. Enter the name of the new folder, then click **OK**. Web Client displays the folders in alphabetical order.

## **Deleting a Folder**

You can delete any folder that you have created, with the exception of the five default folders.

# Caution: Deleting a folder deletes the contents of that folder, including all sub-folders.

#### • To delete a folder:

- 1. Click on the folder that you want to delete.
- 2. Click **Delete the current folder**. A message appears, prompting you to confirm deletion.
- 3. Click **OK**. Web Client removes the directory from the display.

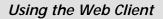
### **Renaming a Folder**

You can rename any of existing folders.

#### Note: You cannot rename any of the default folders.

#### • To rename a folder:

- 1. Click on the folder that you want to rename.
- 2. Click **Rename the current folder**. The Rename Folder dialog appears.





3. Enter the new name of the folder, then click **OK**. Web Client displays the new name of the folder.

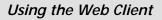
## Copying a Folder

You can copy an existing folder to another folder. For example, you could have two folders both named "Budgets." One budget folder could be in the "This Year" folder, while the other budget folder could be in the "Next Year" folder.

## Note: You cannot copy any of the folders that come installed with Web Client.

#### • To copy a folder:

- 1. Click Folders, then select a folder.
- 2. Click the **Copy the current folder** icon. The Copy the Current Folder dialog appears.



Copy the current folder - Micro	osoft Internet Explo 📕	
🎁 Mailbox	ок	
🗯 <u>New Folder</u>	Cancel	i I
∕ <b>p</b> <u>Draft</u>		
🖗 <u>Inbox</u>		
🔇 <u>Outbox</u>		
🗯 <u>Sent</u>		
🗊 <u>Deleted Items</u>		

3. Select a folder to copy the folder to, then click **OK**. The folder is copied to the indicated folder.

## Moving a Folder

You can move folders to other folders and directories.

#### Note: You cannot move the five default folders.

- To move a folder:
  - 1. Select a folder.
  - 2. Click **Move the current folder**. The Move the current folder dialog appears.

🚰 Move the current folder - Micro	soft Internet Expl 📃	
🌔 Mailbox	ок	
(∲ <u>Draft</u>	Cancel	
🖗 <u>Inbox</u>		
🔇 <u>Outbox</u>		
🗯 <u>Sent</u>		
🖗 <u>Deleted Items</u>		
🗯 <u>Scratch Folder</u>		
		-

3. Select where you want to move the folder and click **OK**. Web Client displays the folder directory tree with the selected folder moved into the new position.

## **Recovering Deleted Messages**

Each time you delete a voice message, e-mail, or fax message, Web Client stores the message in the Deleted Items folder. This allows you to recover deleted messages if you change your mind about deleting one or more messages, you can move them from the Deleted Items folder to another folder.

#### • To recover a deleted message:

- 1. Click **Folders**, then **Deleted Items**. The Deleted Items dialog appears.
- 2. Select the check box beside each message that you want to keep, then click **Move marked items**. The Move marked items dialog appears.
- 3. Select the folder to store the recovered messages and click **OK**. Web Client moves the deleted messages into the selected folder.

## Emptying the Deleted Items Folder

Emptying the Deleted Items folder removes all of the deleted messages and folders from Web Client permanently.

# Caution: Once you empty the Deleted Items folder, you cannot recover the deleted messages.

- To empty the Deleted Items folder:
  - 1. Click Inbox or Folders.
  - 2. Click **Empty Deleted Folder**. A message appears, prompting you to confirm deletion.
  - 3. Click **OK**. The system deletes all items stored in the Deleted Items folder.

## Maintaining the User Settings

The User Settings function allows you to maintain your mailbox on Web Client. You can specify a number of settings including:

- General Options
- Message Options
- Call Options
- Addresses

## Using the Toolbar Buttons

There are 12 buttons that allow you to perform various tasks within the User Settings application.

Button	Name	Function
	Save	Saves the mailbox
¢	Refresh	Refreshes the display
1 <sup>2</sup>	Schedule (Status)	Create a status schedule
1 <sup>2</sup>	Schedule (Phone Addresses)	Create a Phone Addresses Schedule
1 <sup>2</sup>	Schedule (E-mail Address)	Create a E-mail address schedule
1	Schedule (Fax Number)	Create a Fax Number schedule
÷	Add	Add a phone address
$\mathbf{X}$	Remove	Remove a phone address
P	Edit	Edit a phone address
×	Delete all	Delete all mailboxes
Ð	Add Item	Adds item
×	Delete item	Deletes item

## Specifying General Options

The General options screen allows you to specify:

- your presence status
- your passwords
- collaboration services

## Specifying your Presence Status

Web Client provides you with the ability to inform callers when you are not available to come to the phone. For example, if you are on holidays, you can instruct the system to inform a caller that you are away and the date when you will be back in the office.

# Note: The Web Client setting overrides the setting that you specifed in UM Client Manager.

#### • To specify your presence status:

- 1. Click User Settings. The User Settings screen appears.
- 2. Click Status. The Status screen appears.

General	General ?
Status Passwords Collaboration	Status Do Not Disturb
Message Options	Available at
Sort/Order Message Forwarding Playback/Record	year month day hour min 2003 • September • 26 • 20 45
Call Options	
Transfer Options Call Forwarding	
Addresses	
Phone E-mail Fax VPIM WAP Other	

3. From the **Status** drop-down list, select your current status. An appropriate greeting will play for each status.

- 4. Select **Available at** if you want to specify a time when you will be available. In the **year**, **month**, **day**, **hour**, and **min** fields, enter the date and time when the selected status takes affect.
- 5. Click Save.

## Creating a Status Schedule

Web Client provides you with the capability to create a schedule specifying when a particular status greeting is played. For example, you can specify that the "In Office" greeting plays Monday to Friday, between 9 am and 5 pm.

#### • To create a status schedule:

1. Click Schedule. The Status Schedule dialog appears.

🚰 Status Schedule Web Page Dialog 🔹 🤶
🗙 🔁 🔀 🖣 1/1 🕨 🔽 Schedule Enabled
Default In Office
From year month day hour min 2001 - January - 1 - 00 00
To 2001 🗸 December 🔹 31 🔹 23 55 All day 🗸
Sun Mon Tue Wed Thur Fri Sat Everyday
Status In Office 💽
OK Cancel

#### Note: Web Client automatically activates the schedule.

2. From the **Default** drop down list, select the default status greeting that will run if the schedule expires.

- 3. From the **From year**, **month**, and **day** drop down list, select the year, month, and day when you want the voice menu to start playing.
- 4. From the **To year**, **month**, and **day** drop down list, select the year, month, and day when you want the voice menu to end playing.

#### Note: Select All Day if you want the voice menu to play all day.

5. Enter the **From** and **To** hours, in military format. For example, if your company wants the voice menu to play from 9:00 AM to 5:00 PM, set the hours as **From 09:00** and **To 17:00**. If no time is entered, the system will assume all hours.

#### Note: A value of From 13:00 to blank indicates 1:00 PM to midnight.

The maximum value is 23:59 and the minimum value is 0:00.

## Other than a Blank value, the From field cannot be greater than the To field.

6. Select the days of the week on which the greeting is to play.

#### Note: If you want the message to run every day, select Every day.

- 7. From the Status drop down list, select the greeting that will run.
- 8. Click OK.

### Editing a Status Schedule

The status schedule that you create can be edited at any time.

#### • To edit a status schedule:

- 1. Click Schedule. The Status Schedule dialog appears.
- 2. Click the scroll bars to display the status schedule that you want to edit.
- 3. Make the necessary changes, then click OK.
- 4. Repeat steps 2 and 3 to edit another status schedule, or click **OK** to return to the General dialog.

## Deleting a Status Schedule

The status schedule that you create can be deleted any time.

#### • To delete a status schedule:

- 1. Click Schedule. The Status Schedule dialog appears.
- 2. Click the scroll bars to display the status schedule that you want to delete and click **Delete Item**. A message appears, prompting you to confirm deletion.

#### Note: Click Delete All to delete all of the Status Schedules.

- 3. Click OK.
- 4. Repeat steps 2 and 3 to delete another status schedule, or click **OK** to return to the General dialog.

## Specifying a Password

When you login to Web Client, the system prompts you for a password. This

#### • To specify a password:

- 1. Click User Settings. The User Settings screen appears.
- 2. Click Passwords. The Password screen appears.

General	General	?
Status Passwords Collaboration	- Numeric Password Password	
Message Options	****	
Sort/Order Message Forwarding Playback/Record	Confirm Password	
Call Options	UC POP3/IMAP4 Settings	
Transfer Options Call Forwarding	User Name: GERAMIKHOSH	
Addresses		
Phone E-mail Fax VPIM WAP Other	Password Confirm Password	

3. In the **Password** field, enter a password.

4. In the **Confirm Password** field, enter the password again, then click **Save**.

## Specifying a POP3 / IMAP4 Password

POP3 is a **protocol** used by Web Client to retrieve your messages from the server. If your system is not using POP3, it will use IMAP4. If your system is using either POP3 or IMAP4, you must specify a password for authentication.

#### • To specify a password:

- 1. In the Passwords screen:
- 2. In the User Name field, enter the user name.
- 3. In the **Password** field, enter the password.
- 4. In the Confirm Password field, enter the password again.
- 5. Click Save.

## Specifying Collaboration

The Collaboration feature allows you to link to your desired Collaboration or Meeting services. You can either specify a Company defined service, or a User defined service. By default, the system is set to a Company defined service and the WebEx website. You can choose to identity an alternate service by selecting the User defined feature, and entering the corresponding personal collaboration url.

#### • To specify the collaboration service:

- 1. Click User Settings. The User Settings (General) screen appears.
- 2. Click Collaboration. The Collaboration screen appears.

## Note: By default, the system is already set to use the Company defined service (WebEx).

General	General	?
Status Passwords Collaboration	Collaboration Active Collaboration Service	
Message Options	Company Defined Services	-
Sort/Order Message Forwarding Playback/Record		
Call Options		
Transfer Options Call Forwarding		
Addresses		
Phone E-mail Fax VPIM WAP Other		

- 3. In the Active Collaboration Service drop-down list, select User Defined Services. The User Defined Services field appears.
- 4. In the **User Defined Services** field, enter the url for the service that you want to use.
- 5. Click Save.

## Specifying Message Options

Message Options allow you to specify message sorting and order, message forwarding, and playback/record devices.

### Sort/Order Messages

The Sort/Order messages feature allows you to specify the in order in which messages should be played.

#### • To sort/order messages:

- 1. Click User Settings. The User Settings (General) screen appears.
- 2. Click Sort/Order. The Sort/Order screen appears.

General	Message Options	?
Status Passwords Collaboration	Message Playback	
Message Options	C FIFO	
Sort/Order Message Forwarding Playback/Record		
Call Options		
Transfer Options Call Forwarding		
Addresses		
Phone E-mail Fax VPIM WAP Other		

3. Select LIFO or FIFO.

Message Playback	Definition
FIFO (First In, First Out)	FIFO plays the oldest message first and the newest message last.
LIFO (Last In, First Out)	LIFO plays the newest message first.

#### 4. Click Save.

## Specifying Message Forwarding

Web Client allows you to forward your messages to another mailbox, distribution list, AMIS or VPIM account, or an e-mail account. This is useful if you want to designate where certain messages should be forwarded.

#### • To specify message forwarding:

- 1. Click User Settings. The User Settings (General) screen appears.
- 2. Click **Message Forwarding**. The Message Forwarding screen appears.

General	Message Options	?
Status Passwords Collaboration	Message Forwarding Address Type:	
Message Options	Email	
Sort/Order Message Forwarding Playback/Record	Address ray@mtn.com	
Call Options	If using Unified Messaging, e-mail address entered cannot be the same as Corporate e-mail.	
Transfer Options Call Forwarding	hour(s) minute(s)	
Addresses	After 12 23	
Phone E-mail Fax VPIM WAP Other	Delete After Forward	

 From the Address Type drop down list, select an address type. Depending on the address type you select, you must follow the corresponding steps listed in the following:

#### For Mailbox and Distribution List:

- 1. In the **Address** drop-down list, select the mailbox or distribution list to use.
- 2. In the **After Hour(s)/Minute(s)** fields, enter when message forwarding should be enabled.
- 3. Select the **Delete After Forward** checkbox to delete each message after forwarding.

For AMIS or VPIM:

- 1. In the **Remote Sites** drop-down list, select the remote site.
- 2. In the Address field, enter the remote mailbox to use.
- 3. In the **After Hour(s)/Minute(s)** fields, enter when message forwarding should be enabled.
- 4. Select the **Delete After Forward** checkbox to delete each message after forwarding.

#### For **E-mail**:

- 1. In the Address field, enter the e-mail address to use.
- 2. In the **After Hour(s)/Minute(s)** fields, enter when message forwarding should be enabled.
- 3. Select the **Delete After Forward** checkbox to delete each message after forwarding.
- 4. Click Save.

## Specifying Playback/Record Options

The Playback/Record Options feature allows you to specify message playback options as well as indicate the playback and record devices.

- To specify message playback/record options:
  - 1. Click User Settings. The User Settings (General) screen appears.
  - 2. Click **Playback/Record**. The Telephony/Web Client options screen appears.

General	Message Options ?
Status Passwords Collaboration	Telephony Options Say Date and Time
Message Options	Webclient Options
Sort/Order Message Forwarding Playback/Record	Play Back Device Media Player
Call Options	Record Device
Transfer Options Call Forwarding	Java Recorder
Addresses	
Phone E-mail Fax VPIM WAP Other	

- 3. Select **Say Date and Time** if you want to hear the date and time stamp before every message.
- 4. In the **Playback Device** drop-down list, select the device to use for message playback.
- 5. In the **Record Device** drop-down list, select the device to use for recording greetings and messages.

## Note: If Phone is selected in either drop-down list, extra fields become available.

General	Message Options ?
Status Passwords Collaboration	Telephony Options
Message Options	Webclient Options
Sort/Order Message Forwarding Playback/Record	Play Back Device Phone
Call Options	Record Device
Transfer Options Call Forwarding	Phone
Addresses	
Phone E-mail Fax VPIM WAP	Address Type:
Other	Country
	Area/City Code
	Ľ

- 6. In the Address Type drop-down list, select the address type.
- 7. In the **Country** drop-down list, select the country that the phone is located in.
- 8. In the **Area/City Code** field, enter the area/city code for the phone number.
- 9. In the Number field, enter the phone number.
- 10. Click Save.

## **Defining Call Options**

Call Options allows you the flexibility to assign transfer options and enable/disable call forwarding.

## Specifying Transfer Options

By specifying the transfer options, the system will use the assigned active greeting and call functions to receive callers.

#### To transfer options:

- 1. Click User Settings. The User Settings (General) screen appears.
- 2. Click Transfer Options. The Transfer Options screen appears.

General	Call Options ?
Status Passwords Collaboration	Active Greeting Default
Message Options	
Sort/Order Message Forwarding Playback/Record	Caller ID Ask
Call Options	Personal Operator
Transfer Options Call Forwarding	(Not Assigned)
Addresses	Call Screening
Phone E-mail Fax	Call Queuing
VPIM WAP	🔽 Pre Transfer Paging
Other	🔽 Post Transfer Paging

- 3. From the **Active Greeting** drop down list, select the active greeting that you want the system to play when a caller dials your extension.
- 4. From the **Caller ID** drop down list, select the method that Web Client will use to notify you of a call.

Caller ID	Function
None	Turns off screen pops on Call Manager.

Ask	Prompts a caller to input their phone number before Web Client transfers the call. The phone number is used in screen pops if you are using Call Manager.
Рор	Provides a screen pop even if there is no caller ID information available.
Ask and Pop	Prompts the caller to manually input their number so it can be used in the screen pop if no caller ID is available or it is not passed by the telco. This guarantees that a number appears for all incoming calls to you.
5.	From the <b>Personal Operator</b> drop-down list, select the personal operator extension that you want the call to be transferred to.
6.	Select <b>Call Screening</b> if you want the system to instruct callers who want to be transferred to an extension to state their name at the tone.
prompt: " call press given the dialing the	e call is transferred, you will hear the caller's name followed by the system To accept the call press <b>&lt;1&gt;</b> , to reject the call press <b>&lt;#&gt;</b> , or to redirect the <b>&lt;2&gt;</b> ." If you reject the call, the caller hears a no-answer message and is choice of trying another extension, leaving a voice mail message, or e operator's extension. To redirect the call, press <b>&lt;2&gt;</b> and the destination number, then hang up to transfer the call.
7.	Select <b>Call Queuing</b> if you want incoming calls to be placed in a queue when an extension is busy. Callers are informed of their position in the hold queue and given opportunities to either continue to hold or leave a voice message.
Caution:	Call Screening and Call Queuing are only available on telephone systems that provide a busy tone. Most telephone sets with multiple extension appearances do not produce a busy tone.
Note:	Call Screening and Call Queuing are mutually exclusive. You must choose one or the other, but not both.
8.	Select <b>Pre Transfer Paging</b> if you want to be paged before the call is transferred. When a caller requests an extension, the caller is put on hold and the Telephony Enterprise system pages you. The system then waits for a definable period of time (timer is defined in the PBX Advanced dialog with a default of 5 seconds), and transfers the caller to the desired extension.
~	Colort Dest Transfor Desting if we want to be used of the the coll is

9. Select **Post Transfer Paging** if you want to be paged after the call is transferred. When a caller transfers to an extension that is busy or is not answered the caller is forwarded to your mailbox. In your personal greeting, you can offer callers the predefined option to

page you over the telephone intercom system (for example, "Press 4 to have me paged"). Callers must be informed of the paging feature in the user's personal greeting. The system does not have a pre-recorded prompt.

All messages are tagged with a Date and Time stamp. Select **Say Date and Time** if you want to hear the date and time stamp before every message.

# Note: If you do not select this feature, the date and time stamp will not play.

10.Click Save.

## Enabling the Call Forwarding Feature

When call forwarding is enabled, all calls will be forwarded to the assigned number.

#### • To enable call forwarding:

- 1. Click User Settings. The User Settings (General) screen appears.
- 2. Click Call Forwarding. The Call Forwarding screen appears.

General	Call Options	?
Status Passwords Collaboration	Call Forwarding Enable	
Message Options	(Not Assigned)	-
Sort/Order Message Forwarding Playback/Record	,	
Call Options		
Transfer Options Call Forwarding		
Addresses		
Phone E-mail Fax VPIM WAP Other		

- 3. Select the **Call Forwarding Enable** checkbox if you want your calls to be forwarded to another extension.
- 4. From the **Call Forward to** drop-down list, select the extension where your calls will be forwarded to.

5. Click Save.

## Adding a Phone Address

You can add a phone address at any time.

- To add a phone address:
  - 1. Click User Settings. The User Settings (General) screen appears.
  - 2. Click Phone. The Phone screen appears.

General	Addresses	?
Status Passwords Collaboration	Phone Addresses	
Message Options	INT: 10 INT: 12	•
Sort/Order Message Forwarding Playback/Record	EXT: 355 (12345) 1234	
Call Options		
Transfer Options Call Forwarding		
Addresses	🖻 🖄 🖻	
Phone E-mail Fax VPIM WAP Other		

3. Click Add. The Add Address dialog appears.

	rosoft Inte		xpiorer.	
Extern				-
Alt Ex Count	tension try			-
Arub	a(297)			•
Area/	City Code			
 Numb   □ Se	er et as Defau	ult		
	ок		Cancel	

- 4. From the Address Type drop down list, select an address type.
- 5. If you select External or Centrex, the **Country** and **Area/City Code** fields become active.
- 6. From the **Country** drop down list, select a country.
- 7. In the Area/City Code field, enter the area or city code.
- 8. In the **Number** field, change the extension.
- 9. Select **Set as Default** to specify the extension as the default, then click **OK**.

### **Editing a Phone Address**

You can edit an existing phone address at any time.

#### Note: You cannot edit your extension from the General screen.

- To edit the address type:
  - 1. Highlight a phone address and click **Edit**. The Web Page dialog appears.
  - 2. Make the necessary changes, then click OK.

### **Deleting a Phone Address**

You can delete an existing phone address at any time.

- To delete an address type:
  - 1. Highlight the phone address that you want to delete and click **Remove**. A message appears, prompting you to confirm deletion.
  - 2. Click OK.

### Creating a Phone Addresses Schedule

You can create a Phone Addresses Schedule to specify which phone extension the system should use at certain times. This is useful if you work from different extensions at different times or days.

#### • To create a phone address schedule:

- 1. Click User Settings. The User Settings (General) screen appears.
- 2. Click Phone. The Phone screen appears.
- 3. Click Schedule. The Phone Addresses Schedule dialog appears.

🚰 Phone Addresses Schedule Web Page Dialog	? ×
🗙 🖶 🔀 🕢 1/1 🕨 🔽 Schedule Enabled	
Default INT: 358	
From 2001 - January - 1 - 00 00	
To 2001 🗸 December 🗸 31 🗸 23 59 All day 🗸	
Sun Mon Tue Wed Thur Fri Sat	
Phone Addresses INT: 358	
OK Cancel	

#### Note: Web Client automatically activates the schedule.

- 4. From the **Default** drop down list, select the default extension that will be used if the schedule expires.
- 5. From the **From year**, **month**, and **day** drop down list, select the year, month, and day when you want the phone extension to start being used.
- 6. From the **To year**, **month**, and **day** drop down list, select the year, month, and day when you want to stop using the phone extension.

#### Note: Select All Day if you want the voice menu to play all day.

7. Enter the **From** and **To** hours, in military format. For example, if your company wants the voice menu to play from 9:00 AM to 5:00 PM, set the hours as **From 09:00** and **To 17:00**. If no time is entered, the system will assume all hours.

#### Note: A value of From 13:00 to blank indicates 1:00 PM to midnight.

The maximum value is 23:59 and the minimum value is 0:00.

## Other than a Blank value, the From field cannot be greater than the To field.

- 8. Select the days of the week on which you want the extension to be called.
- Note: If you want this extension to be reached every day, select Every day.
  - 9. From the **Phone Addresses** drop down list, select the phone addresses that will run.
  - 10. Click OK.

## Specifying E-mail Addresses

Specifying e-mail settings allows you a number of e-mail addresses where you can be reached when an unread message is received.

#### • To specify e-mail addresses and settings:

- 1. Click User Settings. The User Settings (General) screen appears.
- 2. Click E-mail. The E-mail screen appears.

General	Addresses	?		
Status Passwords Collaboration	Voice Mail Options Send E-mail with New Voice Messages			
Message Options	Attach Voice File to E-mail			
Sort/Order Message Forwarding Playback/Record	E-mail Options			
Call Options	Send E-mail with New Text Messages			
Transfer Options Call Forwarding	Attach Text File to E-mail			
Addresses		_		
Phone	E-mail Address	_		
E-mail Fax	rayg@hotmail.com			
VPIM				
WAP				
Other				
	₽×₽			

3. Select the **Send E-mail with New Messages** checkbox if you want to send defined e-mails with the message.

# Note: The Attach Voice File to E-mail selection becomes active if you select Send E-mail with New Messages.

- 4. Select the Attach Voice File to E-mail checkbox if you want to attach a voice message to an e-mail.
- 5. Select the Send E-mail with New Text Messages checkbox if you want to send defined e-mails with the message.
- 6. Select the Attach Text File to E-mail checkbox if you want to attach a text file to the message.

- 7. Click **Add** to add an e-mail address. The e-mail address dialog appears.
- 8. In the E-mail Address field, enter the e-mail address.
- 9. Select **Set as Default** if you want to make this e-mail address the default address, then click **OK**.
- 10. Click Save.

## Editing an E-mail Address

After specifying e-mail addresses, you can edit them at any time.

### • To edit an e-mail setting:

- 1. Highlight the e-mail address you want to edit and click **Edit**. The e-mail address dialog appears.
- 2. Make the appropriate changes to the settings and click **OK**.
- 3. Click Save.

## **Removing an E-mail Address**

You can delete e-mail addresses at any time.

- To remove an e-mail setting:
  - 1. Highlight the e-mail address you want to delete and click **Remove**. The delete address dialog appears.
  - 2. Click **OK** to confirm the deletion.

# Configuring an E-mail Settings Schedule

An e-mail address schedule allows you to define when the system should send unread messages to certain individual e-mail addresses.

### • To configure an e-mail settings schedule:

- 1. Click User Settings. The User Settings (General) screen appears.
- 2. Click E-mail. The E-mail screen appears.
- 3. Click Schedule. The e-mail schedule dialog appears.
- 4. Select the Schedule Enabled checkbox to enable the schedule.
- 5. In the **From Year/Month/Day** drop-down lists, select the year, month and day you want the schedule to begin.
- 6. In the **To Year/Month/Day** drop-down lists, select the year, month and day you want the schedule to end.
- 7. Click the checkbox that represents the day or days you want the schedule to be enabled or select the **Every day** checkbox to enable the schedule everyday.
- 8. In the **E-mail** drop-down list, select the e-mail address that is to be associated with the schedule.
- 9. Click OK.

# Specifying Fax Addresses

You can specify and add Fax addresses.

### • To specify fax addresses:

- 1. Click User Settings. The User Settings (General) screen appears.
- 2. Click Fax. The Fax screen appears.

General	Addresses ?
Status Passwords Collaboration	Fax Mail Options
Message Options	Attach Fax File to E-mail
Sort/Order Message Forwarding Playback/Record	Optical Character Recognition
Call Options	
Transfer Options Call Forwarding	Fax Number
Addresses	191: 12
Phone E-mail Fax VPIM WAP	
Other	0 X 🖻

- 3. Select the **Send E-mail with New Faxes** checkbox if you want to send defined e-mails with the message.
- 4. Select the Attach Fax File to E-mail checkbox if you want to attach a fax message to an e-mail.
- 5. Select the Optical Character Recognition checkbox.
- 6. In the Fax Number box, click **Add** to add a fax number. The Fax Number dialog appears.
- 7. In the **Internal/External** drop-down list, select whether the fax number is internal or external.
- 8. In the **Country** drop-down list, select the country in which the fax number resides.
- 9. In the **Area/City Code** field, enter the area/city code of the fax number.
- 10. In the **Number** field, enter the fax number.

- 11. Select the **Set as Default** checkbox if you want to make this e-mail address the default address and click **OK**.
- 12. Click Save.
- 13. To delete a fax number, highlight the number and click Remove.
- 14. To edit a fax number, highlight the number and click Edit.

## Configuring a Fax Number Schedule

A Fax Number Schedule allows you to define when the system should send fax messages to certain fax extensions.

#### • To configure a fax number schedule:

- 1. Click User Settings. The User Settings (General) screen appears.
- 2. Click Fax. The Fax screen appears.
- 3. Click Schedule. The Fax Schedule dialog appears.
- 4. Select the Schedule Enabled checkbox to enable the schedule.
- 5. In the **From Year/Month/Day** drop-down lists, select the year, month and day you want the schedule to begin.
- 6. In the **To Year/Month/Day** drop-down lists, select the year, month and day you want the schedule to end.
- 7. Click the checkbox that represents the day or days you want the schedule to be enabled, or select the **Every day** checkbox to enable the schedule every day.
- 8. In the **Fax** drop-down list, select the fax extension that is to be associated with the schedule.
- 9. Click OK.

## **VPIM Addresses**

The VPIM Addresses feature displays the user's VPIM address. This address can only be changed by the administrator in the NBX UM Administration console.

### • To view VPIM addresses:

- 1. Click User Settings. The User Settings (General) screen appears.
- 2. Click **VPIM**. The VPIM screen appears, and displays all existing VPIM addresses.

General	Addresses ?
Status Passwords Collaboration	VPIM Address
Message Options	
Sort/Order Message Forwarding Playback/Record	
Call Options	
Transfer Options Call Forwarding	
Addresses	
Phone E-mail Fax VPIM WAP Other	

## WAP Addresses

Specifying a Wireless Application Protocol device address lets you define a WAP location to contact for message notification.

#### • To specify WAP addresses:

- 1. Click User Settings. The User Settings (General) screen appears.
- 2. Click **WAP**. The WAP addresses screen appears.

General	Addresses	?
Status Passwords Collaboration	Country Canada ( 1 )	
Message Options	Area/City Code	
Sort/Order Message Forwarding Playback/Record	519 Number	
Call Options		
Transfer Options Call Forwarding	4560800	
Addresses		
Phone E-mail Fax VPIM WAP Other		

- 3. In the **Country** drop-down list, select the country in which the WAP address is located.
- 4. In the **Area/City Code** field, enter the area/city code of the WAP address.
- 5. In the Number field, enter the WAP number.
- 6. Click Save.

# Other Addresses

Specifying a SMS address lets you define a SMS location to contact for message notification.

### • To specify other addresses:

- 1. Click User Settings. The User Settings (General) screen appears.
- 2. Click Other. The Other screen appears.

General	Addresses ?
Status Passwords Collaboration	SMS- 123@33.com
Message Options	Reply To-
Sort/Order	vincey@mtn.com
Message Forwarding Playback/Record	
Call Options	
Transfer Options Call Forwarding	
Addresses	
Phone	
E-mail Fax	
VPIM	
WAP	
Other	

- 3. In the SMS field, enter the SMS address to send to.
- 4. In the **Reply To** field, enter an address that will appear in the message that the receiver will be instructed to reply to.
- 5. Click Save.

# Maintaining a Distribution List

Creating a distribution list provides you with an easy way to send messages to a group of people. For example, if you frequently send voice mail to the sales team, you can create a distribution list called "Sales Team" containing the names of everyone in the sales team.

You can use a distribution list to when creating either an e-mail or voice mail message.

# Note: This option allows you to create and maintain up to 99 distribution lists.

## Using the Toolbar Buttons

There are six buttons that allow you to perform various tasks within the Distribution List application.

Button	Name	Function
÷	Create Distribution List	Creates a distribution list
×	Delete Distribution List	Deletes a distribution list
	Save Distribution List	Saves the distribution list
¢	Refresh Distribution List	Refreshes the distribution list if you make changes to it and do not click <b>Save</b> .
>	Add to list	Adds name/address to the list
<	Remove from list	Removes name/address from the list

# Creating a Private Distribution List

You can create a private distribution list that includes a number of inboxes and email addresses. When unread messages are received, the system will utilize the list and send the unread messages to the contacts on the private distribution list.

# Note: Public distribution lists are created by the System Administrator.

### • To create a distribution list:

1. Click **Distribution List**. The Distribution List screen appears.

<u></u>	🕂 🗙 🔛 🚺 II 4 🕨 M 🧿 Private C Public
Inbox	Distribution List
<u>6</u>	
Folders	List Number List Name
User Settings	Mailboxes  214: 215: Distribution List 216: George Anthon
Distribution List	250: PIN TESTING 254: 267: 300: Reception RECEPTION 310: Mohammad Nezarati
Notification	311: Ali Atri 312: Leah Druskin 313: John Biancucci>
Wakeup Call	Remote Sites           1: Esna Technologies         <           2: VPIM Nocal (Laco )         <           3: Esnatech3COM
Collaborate	Email
Log Off	If using Unified Messaging, e-mail address entered cannot be the same as Corporate e-mail.

- 2. Click Create Distribution List.
- 3. In the **List Number** field, enter the list number that you will reference from a phone.

# Note: For more information on accessing a distribution list from your phone, refer to the Telephone User Guide.

4. In the **List Name** field, enter a descriptive name for the distribution list.

- 5. In the **Mailboxes** field, enter the mailbox that you want to add to the distribution list.
- Note: You can also highlight a mailbox, then click the Add to list arrow.

To remove a mailbox, highlight it, then click the Remove from list arrow.

- 6. The **Remote Sites** field displays all other networked locations via AMIS or VPIM. Highlight a user, then click the **Add** arrow. The Remote Sites dialog appears.
- 7. Enter the remote site address and click OK.
- 8. In the **Email** field, enter the e-mail address that you want to add to the distribution list, then click **Save Distribution List**.

## Editing a Distribution List

After a distribution list is created, its properties can be edited.

## • To edit a distribution list:

- 1. Click the scroll buttons until you find the distribution list that you want to edit.
- 2. Make the necessary changes and click Save Distribution List.

# Deleting a Distribution List

A distribution list can be deleted.

## • To delete a distribution list:

- 1. Click the Client scroll button to select a distribution list, then click **Delete Distribution List**. A message appears, prompting you to confirm deletion.
- 2. Click OK.

# Maintaining Notifications

When you are away from your desk or out of the office, you often do not have any

way of knowing if you have received an e-mail or voice message. Web Client has the ability to notify you if you have received e-mail or voice message. For example, if you have received a voice mail message, you can instruct Web Client to notify you by an e-mail message or call to your cell phone, home phone, or another e-mail account.

## Using the Toolbar Buttons

There are six buttons that allow you to perform various tasks within the Notification application.

Button	Name	Function
	Save	Save the notification.
¢	Refresh	Refresh the display.
1	Schedule	Display Notification Schedule dialog.
÷	Add Item	Add a notification schedule.
×	Delete Item	Delete a notification schedule.
×	Delete All	Delete all notification schedules.

## Creating a Notification Rule

Notification rules determine how Web Client will notify you when you receive an email, voice mail, or fax. For example, if you want to be notified each time you receive a voice mail message, you can instruct the system to send you an e-mail. If you are using a cell phone, you can instruct the system to also contact you on the cell phone.

# Note: You cannot have more than one notification rule running at a time.

## • To create a notification rule:

1. Click Notification. The Notification screen appears.

Ç Inbox	Notification
Inbox Folders User Settings Distribution List Notification Wakeup Call Greetings Collaborate	Notifying Mode Restart After Last  Account Code Notification Rules: Voice Mail © Email © Fax Voice Mail Rules All  Certified Internal Urgent  Private External  With Caller ID
Log Off	

2. From the **Notifying Mode** drop-down list, select the mode to search the numbers for notifications.

Mode	Function
Restart from First	After going through all the numbers associated to a current schedule once, Web Client begins from the first number again if it has not notified you during a full cycle.
Restart after Last	Once going through a full cycle of the numbers with no successful notification, Web Client begins from the last address dialed and works its way backwards up the list.
	he <b>Account Code</b> field, enter your long distance access code if equired to make a long distance call from your office.
	the Notification Rules box, Select the media type you want to
set	rules up for.
5. In Th	rules up for. the <b>Voice Mail Rules</b> box, select one or more voice mail rules. ese rules determine when Web Client will notify you when you ve received a message.
5. In Th	the <b>Voice Mail Rules</b> box, select one or more voice mail rules. ese rules determine when Web Client will notify you when you we received a message.
5. In Th ha	the <b>Voice Mail Rules</b> box, select one or more voice mail rules. ese rules determine when Web Client will notify you when you we received a message.
5. In Th ha <b>Media Ty</b>	the <b>Voice Mail Rules</b> box, select one or more voice mail rules. ese rules determine when Web Client will notify you when you we received a message. <b>Pe Function</b>
5. In Th ha <b>Media Ty</b>	the Voice Mail Rules box, select one or more voice mail rules. ese rules determine when Web Client will notify you when you we received a message. pe Function Notify on all messages.
5. In Th ha <b>Media Ty</b> All	the Voice Mail Rules box, select one or more voice mail rules. ese rules determine when Web Client will notify you when you we received a message. pe Function Notify on all messages. Note: This is the default setting.
5. In Th ha <b>Media Ty</b> All Certified	the Voice Mail Rules box, select one or more voice mail rules. ese rules determine when Web Client will notify you when you we received a message. pe Function Notify on all messages. Note: This is the default setting. Notify only on messages marked certified.
5. In Th ha <b>Media Ty</b> All Certified Internal	the Voice Mail Rules box, select one or more voice mail rules. ese rules determine when Web Client will notify you when you we received a message. pe Function Notify on all messages. Note: This is the default setting. Notify only on messages marked certified. Notify only on internal messages.
5. In Th ha Media Ty All Certified Internal Urgent	the Voice Mail Rules box, select one or more voice mail rules. ese rules determine when Web Client will notify you when you we received a message. pe Function Notify on all messages. Note: This is the default setting. Notify only on messages marked certified. Notify only on internal messages. Notify only on urgent messages.

## Note: There are no rules for fax.

6. Click Save.

## **Creating a Notification Address**

Web Client allows you to specify phone and e-mail addresses that will be used to contact you when you have a message. After you have specified the contact methods, you can assign a schedule to a particular notification address.

# Note: If the Phone, Beeper, or E-mail option buttons are not active, contact your System Administrator.

There is no limit to the number of notification addresses that you can add.

## **Creating a Phone Notification Address**

Web Client will contact you via the phone numbers that you specify each time you receive a voice message, e-mail, or fax.

#### • To create a phone notification address:

1. In the **Notification Addresses** box, click **Add**. The Address dialog appears.

Phone	C Beeper	O E-mail
Country	-	Call It
Area/City Code		l time(s) Busy
Number		minute(s)
		No Answer
	ок	Cancel

2. Select Phone.

- 3. From the Country drop down list, select a country
- 4. In the **Area/City Code** field, enter the phone number's area code or city code.
- 5. In the **Number** field, enter the phone number.
- 6. In the **Call It** field, enter the number of times that Web Client is to call the phone number.
- 7. In the **Busy** field, enter the number of minutes that WebClient is to wait before retrying the number if it is busy.
- 8. In the **No Answer** field, enter the number of minutes that Web Client is to wait before retrying the number when there is a no answer.
- 9. Click **OK**. The phone number appears in the **Notification Addresses** field.

## **Creating a Beeper Notification Address**

Web Client will contact you at the beeper numbers you create each time that you receive a voice message, e-mail, or fax.

#### • To create a beeper notification address:

- 1. In the **Notification Addresses** box, click **Add**. The Phone dialog appears.
- 2. Click Beeper. The Beeper dialog appears.

🔿 Phone	Beeper	O E-mail
Country		Call It
	•	time(s)
Area/City Code		Between Calls
l Number		minute(s)
		Wait
1		sec.
		Send
	ок	Cancel

- 3. From the **Country** drop down list, select a country.
- 4. In the **Area/City Code** field, enter phone number's area code or city code.
- 5. In the Number field, enter the phone number
- 6. In the **Call It** field, enter the number of times that Web Client is to call the phone number.
- 7. In the **Between Calls** field, enter the duration of time to wait before retrying the number again. (In minutes).
- 8. In the **Wait** field, enter the duration of time to wait before sending (in seconds).
- 9. In the **Send** field, enter the personal message that will appear when you receive a notification. This feature allows you to personalize your beeper notification, so that you will be aware of where the notification is originating.
- 10. Click **OK** and then **Save**. The beeper number appears in the **Notification Addresses** field.

# Creating an E-mail Notification Address

Web Client will contact you at the e-mail addresses that you create each time that you receive a voice message, e-mail, or fax.

### • To create an e-mail notification address:

- 1. In the **Notification Addresses** box, click **Add**. The Address dialog appears.
- 2. Click E-mail. The E-mail dialog appears.

Email If using Unified Messaging, e-mail address entered can not b same as Corporate e-mail. OK Cancel		• E-mail	(	O Beeper	O Phone
same as Corporate e-mail.					Email
same as Corporate e-mail.					
	e the	ntered can not be t	il address ent		
OK Cancel		1			
			Cancel	ок	

3. In the E-mail field, enter the e-mail address, then click OK.

## **Removing a Notification Address**

Individual notification addresses can be removed from a Notification List.

#### • To remove a notification address:

- 1. Highlight the address that you want to delete, then click **Remove**. A message appears, prompting you to confirm the deletion.
- 2. Click OK.

## **Editing a Notification Address**

The properties of individual notification addresses can be edited.

## • To edit a notification address:

- 1. Highlight the notification address, then click Edit. Depending on the type of notification address you selected, the appropriate dialog appears.
- 2. Make the necessary changes, then click OK.

# Creating a Notification Schedule

The Notification Schedule feature allows you to assign a schedule to a particular notification address. For example, you can create a schedule that instructs Web Client to call you on your cell phone Monday to Friday, between 9 am and 5 pm.

# Note: You must save all of your notification addresses before creating a notification schedule.

## • To create a notification schedule:

1. Click Schedule. The Notification Schedule dialog appears.

🚰 Notification Schedule Web Page Dialog	' ×
🗙 🚱 🔀 🖪 1/1 🕨 🔽 Schedule Enabled	
Default ronintws@hotmail.com 💽	
From 2001 Vanuary	
To 2001 - December - 31 - 23 59 All day 🗸	
Sun Mon Tue Wed Thur Fri Sat Everyday 🗖	
Notification Addresses: ronintws@hotmail.com 💽	
OK Cancel	

- 2. From the **Default** drop down list, select the notification address that Web Client will use to contact you if the schedule expires.
- 3. From the **From year**, **month**, and **day** drop-down lists, select the year, month, and day that you want the schedule to begin.
- 4. From the **To year**, **month**, and **day** drop-down lists, select the year, month, and day that you want the schedule to stop.

#### Note: Select All Day if you want the schedule to run all day.

5. Enter the **From** and **To** hours, in military format. For example, if your company wants the notification to play from 9:00 AM to 5:00 PM, set the hours as **From 09:00** and **To 17:00**. If no time is entered, the system will assume all hours.

#### Note: A value of From 13:00 to blank indicates 1:00 PM to midnight.

The maximum value is 23:59 and the minimum value is 0:00.

# Other than a Blank value, the From field cannot be greater than the To field.

6. Select the days of the week that you want the schedule to run.

Note: If you want the schedule to run every day, select Every day.

- Caution: If two notification schedules are created and the days that they are designated to run overlap, the system will choose to use the default address. If the default address is not one of the addresses specified in the schedules, the system will randomly select an address.
  - 7. From the **Notification Addresses** drop down list, select the notification addresses that will run.
  - 8. Click OK.

## Creating a Wakeup Call

You can use Web Client to act as an alarm clock to wake you up at a specified time.

## Using the Toolbar Buttons

There are three buttons that allow you to perform various tasks within the Wakeup Call application.

Button	Name	Function
×	Clear	Clears the fields of information.
	Update	Updates the wakeup call.
Ø	Refresh	Refreshes the display.

## • To create a wakeup call:

1. Click Wakeup Call. The Wakeup Call screen appears.

inbox	X ■ 函   Wakeup Call
Folders	Country .
User Settings	Number month day
Notification	Date 1 - 1
🍪 Wakeup Call	
Greetings	
Collaborate Log Off	
Log On	

- 2. From the **Country** drop down list, select a country.
- 3. In the **Area/City Code** field, enter either an area code or a city code.
- 4. In the **Number** field, enter the seven-digit phone number.
- 5. From the **Date (month)** drop down list, select the month.
- 6. From the Date (day) drop down list, select the day.
- 7. In the **Time (hour)** and **Time (min)** fields, enter the time when you want Web Client to issue the wakeup call, then click **Update**.

## Canceling a Wakeup Call

You can cancel a wake up if you do not want to woken at the specified time.

## • To cancel a wakeup call:

- 1. Select a wakeup call.
- 2. Click **Clear**. A message appears, prompting you to confirm deletion.
- 3. Click **OK**. Web Client removes the wakeup call information from the display.

# Maintaining Greetings

Web Client comes equipped with 10 basic status messages that can be used to inform callers of your status (for example, if you are on vacation). You can also record up to 100 optional greetings.

#### Note: Before you can record a greeting, you must have the Grant Permissions and Java Plugin software installed on your PC. For more information, contact your System Administrator.

You must have a microphone attached to your PC to record a greeting.

## Using the Toolbar Buttons

There are five buttons that allow you to perform various tasks within the Greetings application.

Button	Name	Function
×	Delete	Deletes a greeting
R.	Record	Records a greeting.
	Play	Plays a greeting.
¢	Refresh	Refreshes the screen.
	Play	This icon appears beside a greeting if it a message has been recorded for it.

## **Playing a Greeting**

You can listen to your current or recorded greeting by using the Windows Sound Player.

## • To play a status greeting:

1. Click the **Play** icon beside the greeting that you want to play. The Windows Sound Player becomes active and plays the message.

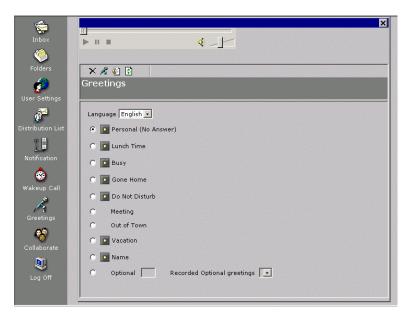
실 Greeting	gs [84_0_1_4.vox] - Microsoft Internet Explorer	- 🗆 🗵
	• • -	

2. To play another greeting, close the Windows Sound Player, then repeat step 1.

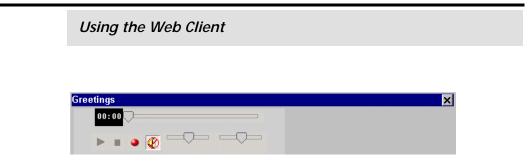
# **Recording a Greeting**

Web Client allows you to create a greeting for each of the nine presence statuses.

- Note: The status greeting for the Name status is recorded when the System Administrator sets you up on the 6510 UM system. However, you can change the greeting.
- To create a status greeting:
  - 1. Click Greetings. The Greetings screen appears.



- 2. From the Language drop down list, select the language that you want to record the message in.
- Note: The number of available languages depends on the languages that were specified when the 6510 UM was installed. For more information, contact your System Administrator.
  - 3. Select the greeting that you want to record and click **Record**. The Windows Sound Recorder becomes active.



4. In the Windows Sound Recorder, click **Record** and begin speaking. The record button changes to the pause button.

Greetings	×
00:05	

- 5. When you have recorded your message, click Stop.
- 6. Click Play to listen to your recorded message.
- 7. If you are satisfied with the message, click **Save**. Web Client places an Play icon beside the new greeting.



8. To play the greeting, select the radio button designated to the greeting type and click **Play**.

# Activating a Greeting

To activate a recorded greeting, select the greeting and it will be activated.



# **Deleting a Greeting**

Web Client allows you to delete any greeting that you have recorded.

- To delete a greeting:
  - 1. Select the greeting and click **Delete**. A message appears, prompting you to confirm deletion.

# Note: If you want to delete an Optional greeting, enter its number in the Optional field.

2. Click **OK**. Web Client removes the Play icon from the greeting.

# Collaborate

Collaboration is a facility that is provided to link you with your desired Collaboration/Meeting services. Once you define the collaboration service in the User Settings, simply click the **Collaborate** button, a new window will open and connect you to the defined Collaboration service.

#### Note: By default, WebEx is defined.



In This Chapter...

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# Overview

Fax Client is a printer driver installed on your PC that allows you to send fax jobs to the Fax server over the IP. The application sits in the user tray, and allows you to print from any windows-based application (for example, Microsoft Word) to the Fax Server.

Each fax is stored in its own folder, depending upon whether it is an incoming (Inbox) or outgoing (Outbox/Sent Items) fax, or has been deleted (Deleted Items).

Each fax can contain one or more attachments.

# **Opening the Fax Client**

1. Click **Start > Programs > Fax > Fax Client**. The Fax Client Administration Console appears.

🎯 Fax Client						_ 8 >
File View Compose Deliver Help						
	2					
Personal Folders	Attention	Fax Number	Send Time	Pages Send	Status	
🏟 Inbox	Adam	+1 (416) 9278761	Immediately	0	Need to render	
🗄 💞 Outbox						
🕕 Fax #1						
Progress Report						
Progress Report						
🖓 🌀 Sent Items						
🗄 💮 Deleted Items						
	Document File	Format	Flags	Print on	Status	
	C:\Document	Letter	PN	Client	Unprepared	
						LIMODA

# **Exiting Fax Client**

To exit Fax Client, close the window.

#### Using the Fax Client

# Navigating the Administration Console

The Administration Console allows you to manage your entire mailbox, including creating a new fax, adding a cover page template, create, delete, rename or edit folders. You can also view faxes that have been sent or received, along with those faxes that are waiting to be sent.

# Organization of the Administration Console

The Administration Console is made up of three windows: Folder Management, Fax Destination, and Document File.

🎯 Fax Client						_ & ×
File View Compose Deliver Help						
Ĉ₽D <u>R</u> ∎ h r×	2					
Personal Folders	Attention	Fax Number	Send Time	Pages Send	Status	
Inbox     Outbox     Outbox     The X #1     The Progress Report     The Progress Report     Sent Items	Adam	+1 (416) 9278761	Immediately	0	Need to render	
🗄 💮 Deleted Items	Document File	Format	Flags	Print on	Status	
	C:\Document		PN	Client	Unprepared	
						11M0064

## Using the Toolbar Buttons

There are eight buttons that allow you to perform various tasks within the Administration console.

Button	Name	Function
<b>*</b>	New fax	Create a new fax
2	Add destinations	Add a destination
D	Add files	Add a file
<u>D</u>	View file	View a file

### Using the Fax Client

¢	Refresh	Refresh the display
×	Delete	Delete a fax
E	Send/Receive	Send or Receive a fax
?	About	Displays information about Fax Client

## Using the Folders

Fax Client comes installed with four folders:

- Inbox—stores incoming faxes
- Outbox—stores all outgoing faxes
- Sent—stores all sent faxes
- Deleted—stores all deleted faxes

## Creating a New Folder

In addition to the four folders that come with the software, you can create an unlimited number of new folders.

#### • To create a new folder:

1. Highlight the root folder from which the new folder will be created.

# Note: You can create a new folder at the same level as the four original folders by highlighting Personal Folders.

- 2. Right mouse click on the folder, then select **New Folder In** (Folder Name).
- 3. Enter the name of the new folder and click **OK**.

# **Deleting a Folder**

You can delete any existing folders, with the exception of the Inbox, Outbox, Sent Items, or Deleted Items folders.

## • To delete a folder:

- 1. Highlight the folder.
- 2. Right-click and select **Delete Folder**. FaxClient moves the folder to the Deleted Items folder.

## **Deleting a Folder Permanently**

Once you have deleted a folder, you can remove it permanently from the Deleted Items folder.

## • To delete the folder:

- 1. Highlight the folder that you want to delete.
- 2. Press the right mouse button, then select **Delete Folder**. A message appears, prompting you to confirm deletion.
- 3. Click OK.

## **Renaming a Folder**

You can rename any existing folders, with the exception of the Inbox, Outbox, Sent Items, or Deleted Items folders.

### • To rename an existing folder:

- 1. Highlight the folder.
- 2. Right-click and select Properties.
- 3. Enter a new name and click OK.

# Creating a Fax

There are two ways to create a fax:

- From inside the windows-based application you are using to create the document (for example, Microsoft Word)
- •From Fax Client.

Either method allows you to create a fax with multiple destinations and attachments.

## Creating a Fax from the Print Dialog

If you are working on a document to fax using a windows-based application (for example, Microsoft Word), you can create the fax directly from the application.

## • To create a fax:

1. Click File>Print from the application. The Print dialog appears.

Print			?×
Printer			
<u>N</u> ame:	🎯 UM Fax Printer		<u>P</u> roperties
Status:	Idle		
Type: Where: Comment:	UC Fax Printer UCFAX: UC Fax Printer Engine		🗌 Print to fi <u>l</u> e
	page C Selection numbers and/or page ranges y commas. For example, 1,3,5–12	Copies Number of <u>c</u> opies:	Collate
		Zoom	
Print <u>w</u> hat:	Document	Pages per s <u>h</u> eet:	1 page 💌
P <u>ri</u> nt:	All pages in range	Scale to paper size:	No Scaling 💌
Options		ОК	Cancel
			UM0065

2. From the **Name** drop down list, select **UM Fax Printer**, then click **OK.** A message appears, confirming that the print job is in session.

After the file has been printed, the Fax Wizard dialog appears. For information on creating a fax, proceed to the next step, "Creating a Fax from the Administration Console".

#### Using the Fax Client

## Creating a Fax from the Administration Console

You can create a fax from the Administration console.

#### To create a fax:

1. Click **New fax**. The Select Fax dialog appears.

# Note: If you are creating a fax from the Print dialog, the Fax Wizard dialog appears.

Select Fax		×
	<u>T</u> itle: <u>F</u> rom: <u>S</u> ubject:	Fax #6 on \\ESNA-CHRIS Chris
	Fax ID:	743A727D-4705-45AD-BB16-A44CB112326F
		< <u>B</u> ack <u>N</u> ext > Cancel

- 2. In the **Title** field, enter the title for your fax document that will appear on the header document.
- 3. In the From field, enter the sender's name.
- 4. In the **Subject** field, enter the subject of the fax.
- 5. From the **Baud** rate drop down list, select the speed that you want to send the fax at.

# Note: The Fax ID field displays a unique identifier for the fax. This information is used by software developers.

6. Click Next. The Select Destinations dialog appears.

Select Destinations	×
	To: Address Book
	Fax #: ( ) Internal call
	Specific baud rate: Default  Add to List
	Recipient list:         Remove           Attention         Fax number
<	Back Next> Finish Cancel

- 1. In the **To** field, enter the recipient's name that will appear in the banner of the fax.
- Note: Click Address Book to display your Microsoft Exchange Contacts. Select a list of clients with fax numbers to send the document to, or enter a name manually. You can click on the address book and it will launch any MAPI based address book you have on your PC9 (for example, an Outlook contact list).

To remove a client from the list or edit a client's information, highlight the client, then click Remove. The client information reappears in the fields at the top, and you can either edit the information or change it.

- 2. From the **Country** drop down list, select the Country Code to use for International dialing purposes. Select the destination country from the list. The default is **None**.
- 3. In the **Fax #** field, enter the fax number dialing string required to reach the destination.

- 4. Select **Internal call** if the destination is a fax client located on the same fax server.
- 5. Click Add to List, then Next. The Select Files dialog appears.

Select Files		×
The second secon	Select files you want to have faxed to destinations:  Do not attach additional files  Attach additional files to the fax  Add to List Scan&Add  File list:	previously choosen Remove
	File name	File Type

 Select Attach additional files to the fax if you want to attach additional files. Click Add to List to navigate to the directory containing the files. The Add Fax Documents window appears.

# Note: You can choose files from any format, as FaxClient will convert them to TIFF format when they are sent.

- 2. Highlight a file and click **OK**. Select **Print document on the client side** if you want the document to be printed to a TIFF file on the client side.
- Click Scan & Add if your computer is connected to a scanner. FaxClient allows you to add the scanned image to the list of attachments.
- 4. Click Next. The Cover Page dialog appears.

Cover Page	×
	Do you want a cover page? No Yes. Send this one: Fax Te C:\Pro Notice For Cover Page Banner type: None
< Bac	ck Next > Finish Cancel

- 1. Select **Yes** if you want a cover page. Select the cover page from the list of templates.
- 2. From the **Banner type** drop down list, select one of the following banner types:
  - US Standard
  - None
  - International Standard
- 3. Click **Finish** to process the fax or **Next** to specify more sending options. The Schedule dialog appears.

Schedule		×	
	Time to send • As soon as possible • Specific time:	lov 30, 2001 2:28 PM 😴	
	Expiration time		
	Never expired     Specific time:	lov 30, 2001 2:28 PM 🚑	
	Importance	Retry mode	
	Normal	O No retries	
	C Send off peak hours	Standard	
	C Urgent	C Extra retries	
	<u> </u>		
< Back Next > Finish Cancel			

- 1. Select a time to send to send the fax. The options are:
  - As soon as possible—send the fax as soon as possible
  - Specific time—specify a specific time to send the fax

If you select **Specific time**, enter the time that you want Fax Client to send the fax.

- 2. Select an Expiration time. The options are:
  - Never expired—keep trying until successful
  - **Specific time**—specify the time that the system is to stop trying to send the fax
- 3. Select an Importance to define the priority on the server of when to send the fax. The options are:
  - Normal
  - Off peak hours (Defined on the server side)
  - Urgent (Top priority)
- 4. Specify a retry mode. The options are:
  - No retries—one attempt only

- Standard—the system will try to send the fax up to four retries
- Extra retries—the system will try to send the fax up to seven retries
- 5. Click **Finish** to process the fax or **Next** to access more sending options. The Notification dialog appears.

Notification		×
	Reason ○ <u>N</u> ever ⓒ <u>Failed only</u> ○ <u>A</u> lways	
	C <u>D</u> estination C <u>G</u> roup C <u>F</u> ax	Detail O <u>Q</u> uick O <u>S</u> tandard O <u>H</u> igh
< E	ack Next>	Finish Cancel

- Specify the **reason** to notify you of the status of the fax. The options are:
  - Never—never notify you of the status or completion
  - Failed Only (Default)—on failed attempts only
  - Always—always notify me of no matter successful or failure
- 2. Specify the level of notification. The options are:
  - **Destination**—for every fax
  - **Group**—for every group completed
  - Fax—for every destination or number sent to
- 3. Specify the detail of the notification message. The options are:

- Quick—short message with the number and result
- Standard—offers time
- High—offers complete detail on the task
- 4. Click **Finish** to process the fax or **Next** to access more sending options. The Finish dialog appears.
- 5. Select **Defer job** if you are offline and have no IP or Internet connection. You can defer the job and process it later when you are back online.
- 6. Select **Transmit job to server** if you are online and can transmit the job to the server. It is configured with your servers default settings and your user name and password for verification.
- Note: If you have multiple servers in different locations, you can enter the IP address of the server you want the job sent to. However, you must make sure that you have a valid account on that particular server to ensure receipt.
  - 7. Click Finish.

# **Displaying and Modifying Fax Properties**

After you create a fax, you can make changes to the Cover Page, Schedule, Notification, and Server Journal before sending it to the Fax Server.

Note: You can only change a fax that is still in the Outbox.

- To modify fax properties:
  - 1. Highlight the fax and click **Compose > Properties**. The fax properties dialog appears.

Fax Properties		×
Title: #1 on \\ESNA-CH	Subject: Test	
From: Chris	Fax ID: A24DD85F-7514-4C40-97BE-496BDE	436E7
Cover Page Schedule N	otification Server Journal Do you want a cover page?  No Yes. Send this one: Fax Template 2 Fax Template 3 Fax Template 4 Fax	
	OK Ca	ncel

- 2. To make changes to a particular setup screen, click the appropriate tab.
- 3. When you have completed all of the changes, click OK.

## Adding a Destination

If you have created a fax but have not sent it to the Fax Server, you can add one or more additional destination locations using one of several methods:

- 1. Highlight the fax, then click **Compose > Add New Destination(s)**.
- 2. Right mouse click on the fax, then select Add New Destination(s).
- 3. Highlight the fax, then click Add destinations.
- 4. Highlight the fax, then press Ctrl+D.
- Note: The fax must still be in the Outbox to add any additional destinations.

## **Deleting an Existing Destination**

Before you send the fax to the Fax Server, you can delete one or more of the destination locations using one of several methods:

- 1. Highlight the destination, press the right mouse button, then select **Delete Destination**.
- 2. Highlight the destination, then press Del.
- 3. Highlight the destination, then click **Delete** from the tool bar.
- 4. Highlight the destination, then click **Compose > Delete**.

## Adding New Files

After you have created the fax, you can add additional files to it using one of several methods:

- 1. Highlight the fax, then click **Compose > Add New File(s)** from the main menu.
- 2. Highlight the fax. Right mouse click anywhere in the Document window, then select Add New File(s).
- 3. Highlight the fax. Highlight an existing attached file, then right mouse click and select **Add New File(s)**.
- 4. Highlight the fax, then click **Add files** from the tool bar.
- 5. Highlight the fax, then press Ctrl+F.

# Note: The fax must still be in the Outbox to add any additional files.

# Deleting an Attached File

Before you send a fax to the Fax Server, you can delete one or more of the attached files using one of several methods:

- 1. Highlight the applicable file, right mouse click and select **Delete File(s)**.
- 2. Highlight the applicable file, then click **Delete** on the tool bar.
- 3. Highlight the applicable file, then click **Compose > Delete**.

## Viewing Attached Files

You can view a file that you have attached to a fax using one of several methods:

- 1. Highlight the attachment, press the right mouse button and select **View Original File**.
- 1. Highlight the attachment, then select **View file** from the tool bar.
- 1. Highlight the attachment, then click **View**, then **View File** from the main menu.

Once the document has been converted to TIFF format, you can view the document by right mouse clicking on it, then selecting **View Fax Image**.

# Deleting a Fax

You can delete a fax before sending it to the Fax Server using one of several methods:

- 1. Highlight the fax, then click **Compose > Delete** from the main menu.
- 2. Highlight the fax, right mouse click and select **Delete Fax** from the menu.
- 3. Highlight the fax, then press Del.
- 4. Highlight the fax, then click **Delete** on the tool bar.

## Submitting a Fax to the Fax Server

After you have created the fax, you can either send the fax immediately or hold it until you have finished creating other faxes.

### • To submit a fax to the Fax Server:

- 1. Highlight the fax.
- 2. Click **Deliver > Submit Fax** (Fax Name) from the main menu.

Once the fax has been submitted, FaxClient moves it to the Sent Items folder, and changes the status of the attached file(s) to **Converted** (if the document was converted from a non-supported format).

## Holding or Releasing a Fax

Faxes are held at the Fax Server if you applied a schedule when creating the fax. For more information, refer toCreating a Fax from the Administration Console on page 146.

## Specifying Delivery Options

You can customize the sending and receiving options for a fax, including sending and receiving faxes when you start Fax Client, and checking for new messages.

### • To change the delivery options:

1. Click **Deliver > Options** from the main menu. The Options dialog appears.

Options	×
Send / Receive Messages	-
Send and receive messages at startup	
🗖 Check for new messages every 🛛 15 📑 minutes	
Show system message box on new fax message	
OK Cancel	

- 2. Select **Send and receive messages at startup** if you want FaxClient to send faxes stored in the Fax Destination window. Selecting this option will also instruct FaxClient to receive all faxes addressed to you.
- 3. Select **Check for new messages every 15 minutes** if you want FaxClient to check for new faxes. The default is 15 minutes.
- 4. Select **Show system message box on new fax message** if you want FaxClient to notify you each time you receive a new fax.
- 5. Click OK.

# Changing a Cover Sheet

Fax Client comes with five pre-designed fax cover sheets (or templates). You can either use one of these existing cover sheets or add your company logo and contact information to an existing cover sheet.

### • To change a cover sheet:

1. Click File > Register Cover Page from the main menu. The Register Cover Page dialog appears.

Register Cover Page		×
File name	Template Fax Templ	Close
C:\Program Files\3Com\Fax-L C:\Program Files\3Com\Fax-L C:\Program Files\3Com\Fax-L C:\Program Files\3Com\Fax-L	Fax Templ Fax Templ Fax Templ	Add Remove Edit
		View

2. Select a file name, then click **Edit**. The Edit Cover Page dialog appears.

Ec	lit Cover Page	×
	– Logo Full Path For Logo Picture	
	Picture Size	Width: 150 Height: 90
	Company Name	
	Return Address	
	Phone Fax	Preview OK
		Cancel

• In the **Full Path For Logo Picture** field, enter the path to the directory containing the logo.

#### Note: Click Browse to search for the directory.

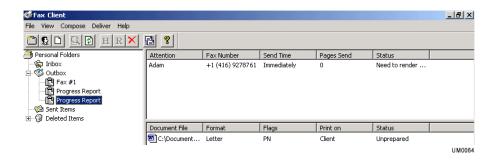
- In the **Picture Size** field, enter the width and height of the logo.
- In the **Company Name** field, enter the name of your company.
- In the **Return Address** field, enter the return address that you want to appear on the fax.
- In the **Phone** field, enter your company's phone number.
- In the **Fax** field, enter your company's fax number.
- 3. Click **Preview** to view the cover page.
- 4. Click File>Close to return to the Edit Cover Page screen.
- 5. Click **OK** to return to the main menu.

# **Printing Offline**

If you sent fax jobs to the server while you were offline, you can send them once you are reconnected to the server.

## • To print offline:

1. Click Start > Programs > Fax > Fax Client. The Fax Client screen appears.



2. Click **Send/Receive**. Fax Client connects to the default server and processes all jobs that were completed while offline.

## Checking the Status of a Fax Job

You can check the status of your fax in real time.

Note: You must be online to check the status of a fax job.

- To check the status of a fax job:
  - 1. Click **Start>Programs>Fax>FaxClient**. The Fax Client Administration console appears.

🎯 Fax Client						_ 8 ×
File View Compose Deliver Help						
🖺 🔒 🖻 🖪 💌	8					
Personal Folders	Attention	Fax Number	Send Time	Pages Send	Status	
Inbox     Outbox     Outbox	Adam	+1 (416) 9278761	Immediately	0	Need to render	
-	Document File	Format	Flags	Print on	Status	
	C:\Document	Letter	PN	Client	Unprepared	
						UM0064

- 2. Click on the file to view the fax.
- 3. Highlight the fax, then press the right mouse button to view advanced options.
- 4. Click **Fax Properties** for a live status of the fax job. The Fax Properties dialog appears.

Fax Properties	×
Title: #1 on \\ESNA-CH	Subject: Test
From: Chris	Fax ID: A24DD85F-7514-4C40-97BE-496BDE436E7
Cover Page Schedule N	Iotification       Server Journal         Do you want a cover page?         Image: Send this one:         Fax Template 1         Fax Template 3         Fax Template 4         Image: Send this one:         Fax Template 4         Image: Send this one:         Fax Template 4         Image: Send this one:         Fax Template 4
	Banner type: Initial baud rate:
	US standard 🔽 Maximum 💌
	OK Cancel

The properties dialog box summarizes all the options you selected while creating the fax job.

- 5. Click Server Journal for active status.
- 6. Fax Client will notify you automatically if you select Notification.
- 7. Click **OK** to close the Fax Properties dialog.

## **Receiving and Viewing Faxes**

To receive faxes that may be waiting for you, click **Deliver>Send and Receive**. FaxClient transfers the faxes from the spooler to the Inbox folder.

To view the contents of a fax, double-click on it. FaxClient opens the fax as a .tiff image. Once FaxClient displays the fax, you can open the image or print it.

# Forwarding a Fax

Once you have received a fax, you can forward it to another destination.

## • To forward a fax:

- 1. Highlight a fax in the Inbox folder. Press the right mouse button and select **Forward Fax**. The Forward dialog appears.
- 2. From the Local Users list, select a user to send the fax to, then click the right arrow. FaxClient pastes the user fame into the Recipient List field.

# Note: You can also click Address Book to display your Contact Manager.

3. Click Send.

# **Displaying Fax Properties**

Each time that you highlight a fax in the Folder Management window, FaxClient displays information about that fax in the Fax Destination window.

## Fax Destination window

The following table details each property and function in the Fax Destination window.

Property	Function
Attention	Indicates the name of the person or organization that the fax is intended for.
Fax Number	Indicates the fax telephone number that must be dialed to successfully send the fax. Different dialing formats for different locations are accommodated in the Fax Wizard when faxes are created.
Send Time	Indicates whether to send the fax immediately or at a specified time. To change the time, highlight the fax. then press the right mouse button. Select <b>Destination Properties</b> , then click the <b>Schedule</b> tab.
Pages Send	Indicates the number of pages to fax.
Status	Indicates the status of the fax. For more information, refer to Appendix A.

## **Displaying Attached Files**

Each time that you highlight a fax in the Folder Management window, FaxClient displays information about the attached files in the Document File window.

Document File	Format	Flags	Print on	Status
🖾 C:\Documentation\documents status.doc	Letter	PF	Client	Converted
C:\Documentation\DocList.doc	Letter	PN	Client	Unprepared

## Document File window

The following table details each property and function in the Document File window.

Property	Function
Document File	Indicates the name of the file.
Format	Indicates the format of the letter.
Flags	Indicates the orientation and resolution of the attachment.
Print on	Indicates if the attachment prints to a TIFF file on the server side or the client side.
Status	Indicates the status of the fax. For more information, refer to Appendix A.

# Broadcasting a Fax

FaxClient allows you to send a fax to multiple locations at once using one of the following methods:

- Select the clients from the Address Book. Enter each client's information on the Select Destinations dialog, then click Add to List.
- 2. Select the clients from the Address Book, then add additional clients using the Select Destinations dialog.
- 3. Create a Distribution list in your Contact Manager, then select that list from the Fax Client.

Note: At the present time, only Microsoft Outlook is supported.

# Adding a Fax Cover Page

Fax Client version 1.2 supports pure HTML format, such as documents created using Microsoft FrontPage or Microsoft Publisher.

Caution: Mitel Networks recommends that you do not use Microsoft Word to convert your document to HTML, as Microsoft Word saves an HTML file in XML format that is not supported in this version of Fax Client.

### • To add a cover page:

- 1. If you use one of the Fax cover page templates to make your cover page, click **File>Register Cover Page** from the main menu.
- 2. Select the template that you wish to use, then click Edit.
- 3. After you finish editing, save it in the same file name. If you save it as a new name, you must register the new template. For more information, refer to Changing a Cover Sheet on page 158.
- 4. If you prefer to not to use one of the templates, use Microsoft FrontPage to edit your new cover page. Save it in HTML format, then register the cover page with a new template name.
- 5. To remove a cover page from the list, highlight the template, then click **Remove**.
- 6. To view an existing cover page, highlight the template, then click **View**.

#### Note: The document cannot be edited.

# APPENDIX Flags

## Appendix

# Flags

There are two flag sets: Destinations and Files.

# **Destination Flags**

The following table displays the fax type and conditions for destinations.

Flag	Meaning
U	Priority – Urgent
Ν	Priority – Normal
L	Priority – Low (send at peak time only)
S	Scheduled for a certain time
С	Sending with a cover page
Х	Has an expiration time

# **File Flags**

The following table displays the orientation and resolution of an attachment.

Flag	Meaning
Р	Orientation – Portrait
L	Orientation – Landscape
Ν	Resolution – Normal
F	Resolution – Fine

# Status

Each flag indicates the status of a fax.

Status Message	Definition
Converted	File converted to Faxable format
Failed to Receive	Failed during fax receiving
Failed to Render	Failed during file rendering phase
Failed to render cover page	Failed to convert cover page to Faxable format
Failed to render cover template	Failed to generate cover page from template
Failed to send	Failed during sending of the fax
Need to render cover page	Cover page not converted to faxable format
Need to render cover template	Cover page not created from template
Ready	Fax is finished. Destination is ready to send.
Rendering	Destination has been received
Rendering cover page	Rendering to faxable format is in progress
Rendering cover template	Converting cover page to faxable format is in progress
Sending	Sending is in progress
Sent	Destination has been sent
Unprepared	Fax is waiting to be prepared for faxing

# Appendix

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