

Quick Start Installation Guide

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**Quick Start
Installation Guide**
Version 2.0

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First edition 2001.

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Additional U.S. and foreign patents pending.

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800-03903

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Installation overview

This overview offers general guidelines for setting up and configuring a new Lingo system installed on a Dialogic VoiceBrick hardware unit. Procedures for customizing Lingo features to meet customer needs are provided for each system screen. Additional information about console screen fields and conceptual topics are located in online Help.

Lingo documents available to installers on the Lingo customer CD and on the Active Voice dealer web site are the *User Guides*, the *System Administration Guide*, and the *Quick Start Installation Guide*.

To set up Lingo at a customer site

- 1 Unpack the system components.
- 2 Choose where to put the voice messaging system and complete the steps listed on the Dialogic Wall-Mounting Template included with the unit.
- 3 Connect the voice lines from the phone system to the Dialogic VoiceBrick ports, using RJ11 cables.
- 4 Plug the VoiceBrick power supply into a compatible wall outlet.
- 5 Attach a null modem cable from your laptop computer's serial COM port to the VoiceBrick's COM2 port.
- 6 Connect to Lingo using CoSession or another remote program. If you need to install CoSession Remote, see "Installing CoSession version 7.0 on a support computer" on page 4.
- 7 Configure the voice messaging system application screens to meet the customer's needs. Begin with "Completing the site information," on page 8. The bottom of each screen lists the most frequently used navigational keystrokes for that screen. To access online Help, press F1.
- 8 Run the Learn Tones utility. See "Running the Learn Tones utility," on page 38.
- 9 Test the extensions. See "Testing the system after installation" on page 37.
- 10 Set up a new system manager ID and train the system manager. See "Training" on page 41.

Installing CoSession version 7.0 on a support computer

Lingo systems are shipped with CoSession version 7.0 Host software pre-installed. If you have not already done so, install CoSession VM/Remote software on your support computer to remotely access and control a customer site (host) voice messaging system and to transfer, update, and maintain voice messaging system files.

Microsoft Windows 95 or Windows 98 are required to run CoSession version 7.0. Windows 3.1 standard mode is not supported. Windows NT and Windows 2000 are also not supported.

If you already have a previous version of CoSession VM/Remote software installed on your maintenance computer, perform the following procedure “To copy the connection settings” on page 4. If you are installing CoSession Remote software on your computer for the first time, skip to “To install the new VM/Remote communications software” on page 6.

To copy the connection settings

- 1 On the computer you use to connect to the voice messaging system, exit to a command prompt, then go to the Remote directory.
- 2 If you are copying settings from a DOS client, continue with step 3. If you are copying settings from a Windows client, skip to step 10.
- 3 At the command prompt, type `remote` and press ENTER.
- 4 Press ALT+LEFT SHIFT. The Main Menu appears.
- 5 Press F2, then press F3. The Phone Book menu appears.
- 6 Press PAGE DOWN or PAGE UP to display a site that you want to record information about.
- 7 Write down the settings in the “Login,” “Password,” “Port,” “Baud,” “Modem (the site’s phone number),” “Dial,” and “Term” fields.
- 8 Repeat steps 6 and 7 for each additional site that you want to record information about.
- 9 When you are finished recording site information, press F10 to exit the VM/Remote communications software, then skip to the procedure “To install the new VM/Remote communications software” on page 6.

- 10 If you are copying settings from a Windows client, on the CoSession Remote Viewer Control Center dialog box, click "Phone Book."
- 11 In the Phone Book, click a site that you want to record information about.
- 12 Write down the settings in the "Name," "Description," "Phone ID," "Communications Type," and "Terminal Type" fields.
- 13 Under Communications Type, click "Setup."
- 14 Write down the settings in the "COM Port," "Baud Rate," and "Modem Name" fields.
- 15 Click "Close."
- 16 Under Terminal Type, click "Setup."
- 17 Write down the settings for "Login Name" and "Login Password" fields. Click "Close."
- 18 Repeat steps 11 through 17 for each additional site that you want to record information about.
- 19 Click "Exit."
- 20 Perform the following procedure, "To uninstall the Windows client."

To uninstall the Windows client

- 1 On the Windows task bar, click "Start."
- 2 Click Programs>CoSession for Windows> CoSession Uninstall.
- 3 Restart the computer.
- 4 Perform the following procedure, "To install the new VM/Remote communications software."

Continued

To install the new VM/Remote communications software

- 1 Insert Disk 1 or CD 1 into the appropriate drive.
- 2 If you are installing from a disk, click “Start,” then click “Run.” Enter `a: \setup.exe` and click “OK.”

If you are installing from a CD, go to the CD directory and double click “Setup.exe.”
- 3 Enter your name, press Tab, enter your company’s name, then click “OK.”
- 4 Accept the default installation directory of `C:\Insync\csw`.
- 5 When prompted for install options, if you are installing from a disk, choose “Custom install” and click “OK.”

If you are installing from a CD, choose “Full install.”
- 6 Follow the on-screen instructions. The install program will make a copy of your original System.ini file.
- 7 When prompted, use the following defaults to set up a connection to the voice messaging system.

Direct connect:
 - Baud Rate: 19200
 - ComPort: COM1Modem connect:
 - Modem Type: Hayes Extended
 - Baud Rate: 2400
- 8 Enter the phone number used to dial in to the customer system.
- 9 Complete the on-screen registration information, and click “Continue.”
- 10 When prompted to “Restart Windows or continue,” select “Restart Windows.” Once Windows restarts, perform the following procedure, “To enter the site connection settings.”

To enter the site connection settings

- 1 Start the CoSession Remote client.
- 2 On the CoSession Remote Viewer Control Center dialog box, click "Phone Book."
- 3 Click "New," and enter the first site's connection settings for Name, Description, and Phone ID.
- 4 Under Communications Type, click "Setup." The CoSession Remote Serial Setup dialog box appears.
- 5 Enter the COM Port, Baud Rate, and Modem Name that you recorded earlier for this site. Click "Save" and "Close." The CoSession Remote Viewer Control Center dialog box appears.
- 6 Under Terminal Type, click "Setup." The CoSession Remote Viewer Control Center dialog box appears.
- 7 Type the Login Name support and Login Password voice.
- 8 Click "Close." The CoSession Remote Viewer Control Center dialog box appears.
- 9 Repeat steps 3 through 8 for each additional site that you will want to connect to.
- 10 In the CoSession Remote Viewer Control Center, click "Save" and "Close." CoSession Remote is now set up to connect to client voice messaging systems.

To connect to the voice messaging system using CoSession

- 1 In the CoSession Remote Viewer Control Center, in the "Name" drop-down box, click the name of the site that you want to connect to.
- 2 Click "Call." The voice messaging system's Banner screen appears.
- 3 At the Banner screen, press F2.
- 4 Type the default system manager ID and password and press ENTER.

To sign out of the voice messaging system

- 1 Press ESC until you see the message "Are you sure you want to sign out to the Banner screen?"
- 2 Type y to confirm that you want to sign out.

Completing the site information

Application screen page 1 holds basic reference information about the site and the voice messaging system. The settings of the fields on lines 1 through 6 do not affect the voice messaging system operation. They are for informational purposes only. Line 7 does affect the voice messaging system operation and must contain correct information.

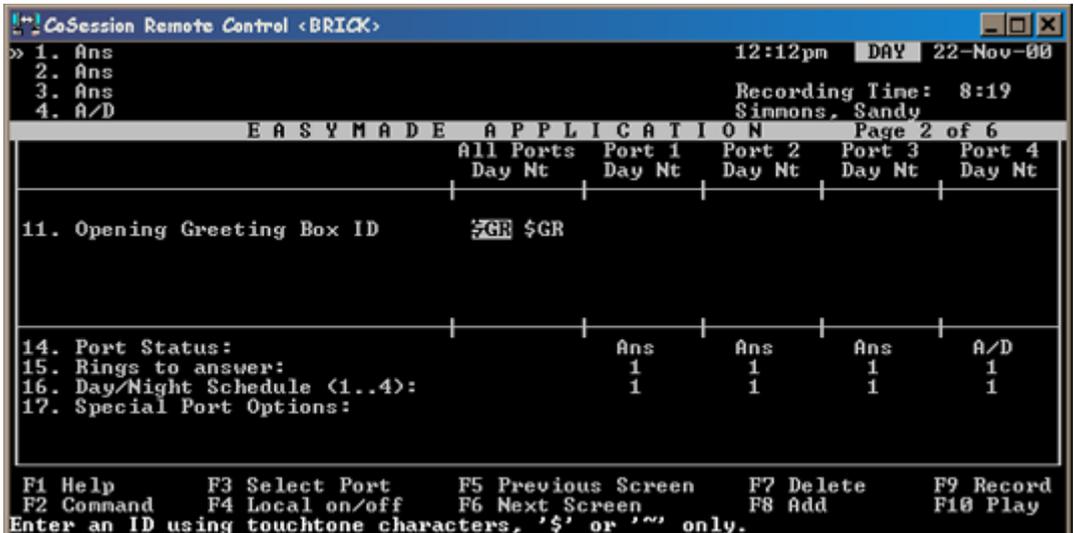
```
CoSession Remote Control (BRICK)
>> 1. Ans                               9:15am  DAY  11-Oct-00
    2. Ans
    3. Ans                               Recording Time: 8:21
    4. A/D                               Simmons, Sandy
                                     EASYMADE APPLICATION Page 1 of 6
1. Site name: Your Company Name
2. Contact: _____ Phone#: _____
   _____ Calls Answered
3. Total trunks/stations: 0 /0          Calls/day: 0
4. Day Calls Answered: All-trunks      Night Calls: All-trunks
5. All ports busy action: Ring-until-answered
   _____ Access Numbers
6. Trunk Pilot #: _____ # of Trunks Answered: 0
   Alternate Trunk #s:
7. Voice Port Stations Pilot #:
   Station Numbers:
F1 Help      F3 Select Port  F5 Previous Screen  F7 Delete  F9 Record
F2 Command  F4 Local on/off F6 Next Screen     F8 Add     F10 Play
Enter any character.
```

To complete the site information fields

- 1 On Application screen page 1, in the “Site name” field, type the organization’s name.
- 2 In the “Contact” and “Phone#” fields, type the system manager’s name and phone number.
- 3 In the “Total trunks/stations” fields, type the number of external phone numbers and the number of stations available on the phone system.
- 4 In the “Calls/day” field, type the average number of daily calls that the organization receives.
- 5 In the “Day calls answered” field, type the appropriate value.
- 6 In the “Night calls” field, type the appropriate value.
- 7 In the “All ports busy action” field, type the appropriate value.
- 8 In the “Trunk pilot #” field, type the phone number that external callers dial to call the voice messaging system.
- 9 In the “# of trunks answered” field, type the number of trunks that the voice messaging system answers.
- 10 In the “Alternate trunk #s” field, type an alternate phone number that external callers can use to access the system.
- 11 On line 7 after “Voice port stations,” in the “Pilot #” field, type the master hunt group number.
- 12 On line 7 after “Voice port stations,” in the “Station numbers” field, type the extension number for each phone system line that is connected to a voice messaging voice port.

Configuring voice messaging ports

Application screen page 2 contains the voice messaging system port settings.

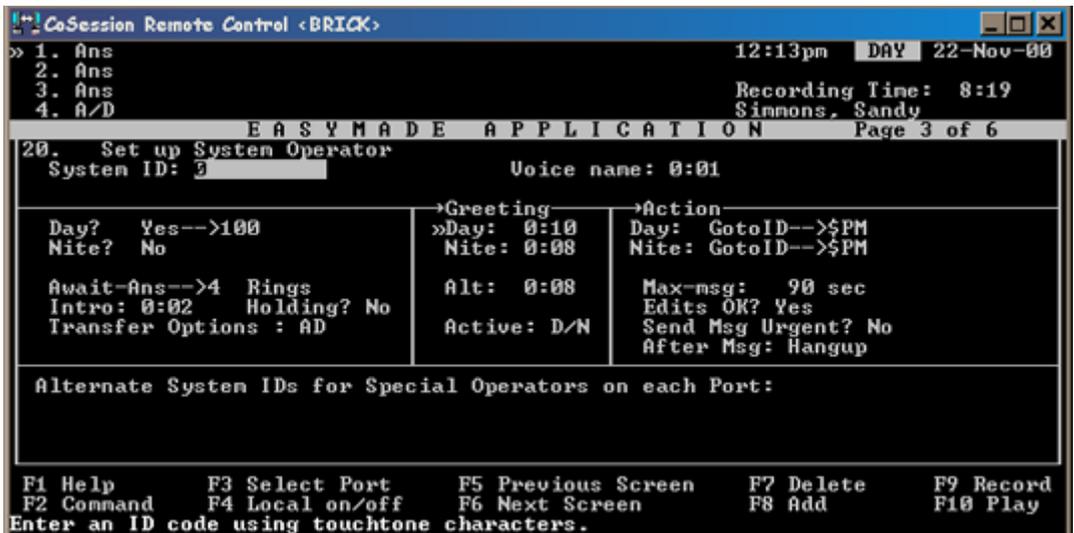


To complete the port settings

- 1 In the “Opening greeting box ID” field, type the system ID for the opening greeting box that answers this port for day mode and night mode.
- 2 In the “Port status” field, type the value for the port’s actions.
- 3 In the “Rings to answer” field, type the number of rings the system waits before it goes off hook for each port. If the phone system uses pooled ringing, type 0.
- 4 In the “Day/night schedule” field, type the number of the schedule to assign to each port.
- 5 In the “Special port options” field for each port, type the appropriate value for the phone system.

Setting up the operator box

Application screen page 3 contains the operator box settings.

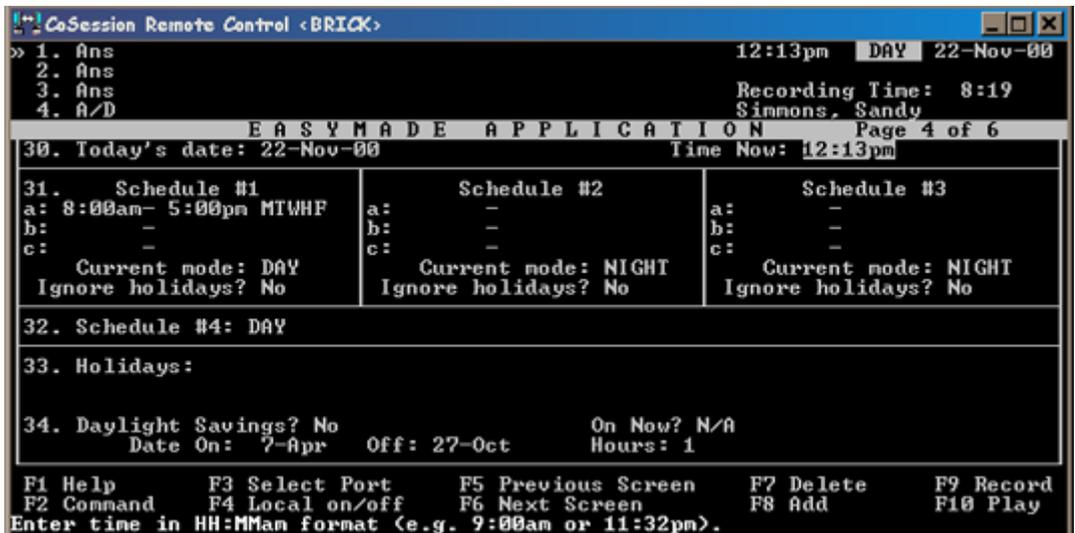


To set up the operator box

- 1 Review and update the default call transfer settings if necessary.
- 2 Work with the system manager to record day, night, and alternate greetings.
- 3 Review and update the action after greeting, if necessary.
- 4 Assign multiple operator boxes to ports, if used.

Determining system schedules

The fields on Application screen page 4 control date, time, and schedule information. To set up the voice messaging system to handle calls differently depending on the day or time, you can use schedules.



To set up system date, time, and schedules

- 1 In the "Today's date" field, type the correct date.
- 2 In the "Time now" field, type the correct time.
- 3 In the "Schedule 1" fields, type the beginning and ending times and days of the week for day mode.
- 4 For sites that have multiple departments that follow different schedules, type the beginning and ending times and days of the week for day mode in the "Schedule 2" and "Schedule 3" fields.
- 5 In the "Schedule 4" field, select either day or night mode.
- 6 In the "Holidays" field, enter all holidays observed by the site.
- 7 Adjust the system for daylight saving time, if necessary.

Setting up the default subscriber

When the voice messaging system is first installed, Application screen page 5 is used to specify the default settings for all subscribers. Before you add subscribers, set the fields on this screen for the features that most subscribers will use. There is also an expanded options screen for selecting subscriber access codes.

```

CoSession Remote Control <BRICK>
12:14pm DAY 22-Nov-00
Recording Time: 8:19
Simmons, Sandy
E A S Y M A D E A P P L I C A T I O N Page 5 of 6
40. Defaults for each new Subscriber:
Personal ID: 2X
Access: BCFP Hold/Archive msgs: 0 /2 days
Transfer? Yes-->X Greeting Action
Await-Ans-->4 Rings Take-msg
Screening? No Holding? No Max-msg: 90 sec Edits OK? Yes
Message Notification
Lamp #: X Activate Lamps? Yes
#1: X after 0 min, 8:00am- 6:00pm MTWTF 4 rings 30 min,Off
#2: after 0 min, 6:00pm- 9:00pm MTWTF 5 rings 60 min,Off
#3: after 0 min, 12:00am-11:59pm MTWTFPSU 5 rings 30 min,Off
#4: after 0 min, 12:00am-11:59pm MTWTFPSU 4 rings 60 min,Urgent
Ctrl-E for expanded options
F1 Help F3 Select Port F5 Previous Screen F7 Delete F9 Record
F2 Command F4 Local on/off F6 Next Screen F8 Add F10 Play
Enter an ID code using touchtone characters.
  
```

To set up the default subscriber

- 1 In the “Personal ID” field, confirm or change the prefix digit.
- 2 Confirm or change the “Hold/Archive msgs” settings.
- 3 Press CTRL+E. From the Expanded Options menu, select “Access Codes.”
- 4 On the Access Code options screen, confirm, select, or clear the appropriate check boxes. To change from the Yes-No conversation to the Menu Mode format, select option M.
- 5 Press ESC to exit the Access Code options screen.
- 6 Confirm or change the Transfer, Greeting, and Action options.
- 7 Confirm or change the Message Notification options.

Selecting message management options

Application screen page 6 contains a variety of options for managing messages, message storage, and the public fax box.



To set message management, storage, and public fax box options

- 1 Confirm or change the values on lines 50 through 53.
- 2 In the “Bad ID go to” field, type the system ID that calls are routed to when they exceed the maximum number of invalid ID attempts.
- 3 Confirm or change the values on lines 54 through 59.
- 4 Confirm or change the values for the public fax box fields, if necessary.

Adding subscribers at the console

The Personal directory contains a page for each subscriber, guest, and system manager enrolled in the system. When you create a new subscriber, this screen shows the default settings from Application screen page 5. For a new installation, you typically add a subscriber database at the console. After initial setup, the system manager adds new subscribers as needed using the system manager conversation.

At any time, you can change the settings on the personal directory pages for those subscribers who want different options. Changing a setting for an individual subscriber does not affect the default subscriber settings.

```
CoSession Remote Control <BRICK>
>> 1. Ans                               9:33am DAY 11-Oct-00
    2. Ans
    3. Ans                               Recording Time: 8:21
    4. A/D                               Simmons, Sandy

PERSONAL DIRECTORY NAME SORT
Name: Simmons, Sandy                SYSTEM MANAGER
Personal ID: SANDY                  Voice name: 0:02
Extension # ID: 9696                 Hold/Archive msgs: 0 /2 days
Access: BC                           New Msgs:0 =0:00 Total:0 =0:00

->Transfer-                          >Greeting-                          >Action-
Transfer? No                          >>Std: 0:00                          Take-msg
Await-Ans-->4 Rings                  Alt: 0:00                          Max-msg: 90 sec Edits OK? Yes
Screening? No Holding? No
Message Notification
Lamp #: X                            Activate Lamps? No On Now? No
#1: after 0 min, 8:00am- 6:00pm MTWTF 4 rings 30 min,Off
#2: after 0 min, 6:00pm- 9:00pm MTWTF 5 rings 60 min,Off
#3: after 0 min, 12:00am-11:59pm MTWTFPSU 5 rings 30 min,Off
#4: after 0 min, 12:00am-11:59pm MTWTFPSU 4 rings 60 min,Urgent

Ctrl-E for expanded options

F1 Help      F3 Select Port  F5 Previous Screen  F7 Delete      F9 Record
F2 Command   F4 Local on/off F6 Next Screen      F8 Add         F10 Play
Enter an ID code using touchtone characters.
```

To add new subscribers at the console

- 1 From the Personal Directory screen, press F8.
- 2 From the Add menu, select "Subscriber" to add one mailbox, or "Range" to add a range of mailboxes.
- 3 Type the subscriber name, extension, and any other preliminary information. This includes changing default values as needed for each new mailbox created.
- 4 Press CTRL+E to select any applicable options from the Expanded Options menus.
- 5 Let subscribers know that they can now enroll in the system. When subscribers follow the system enrollment conversation, their mailbox setup will be completed.

Setting up the phone system integration

Switch setup pages 1, 2, and 3 contain parameters that allow the voice messaging system to work with the phone system.

The basic integration between the phone system and the voice messaging system is accomplished by connecting the systems using the procedures in “Installation overview,” on page 2, and selecting your phone system on Switch Setup screen page 1. Additional online Help for setting up the integration is available for most phone systems. Simply type the first few characters of your phone system manufacturer’s name in the “Switch” field and press F1 twice.

Switch Setup screen page 1 allows you to select your phone system from the choices offered in the switch setup library.

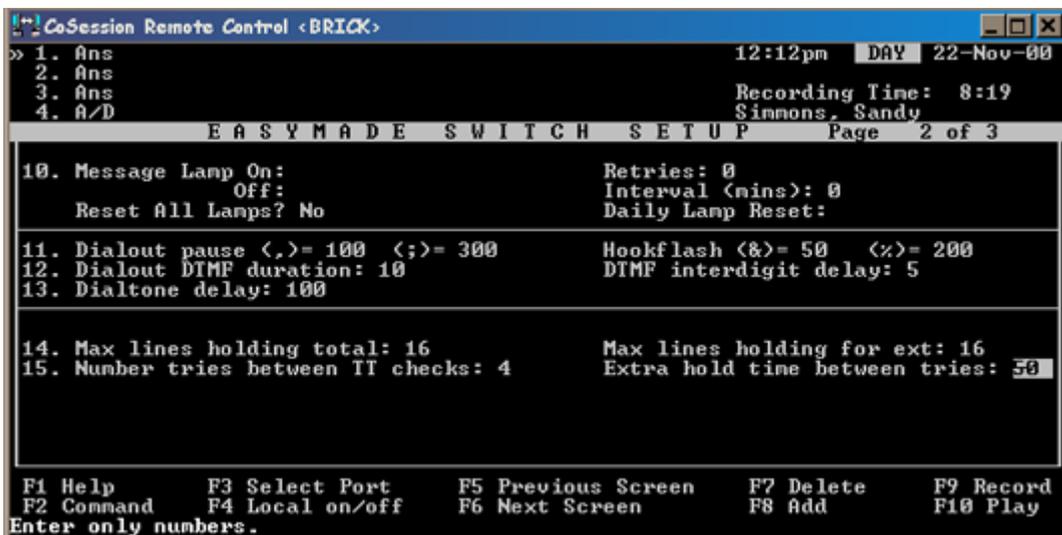
```
CoSession Remote Control (BRICK)
12:09pm DAY 22-Nov-00
Recording Time: 8:19
Simmons, Sandy
E A S Y M A D E S W I T C H S E T U P Page 1 of 3
1. Switch: DEFAULTS Default Parameters DEFAULTS 20
2. Integration Options:
3. Outdial Access: 9,
4. Transfer Initiate: &,X Recall: &,
   Connect: Q Busy Recall: &,
5. TI Prompt/Msg/Record: 4 /4 /? Release on LCR? Yes
6. Answer on ring low? Yes Off-hook delay: 25
7. Ring-on time: 10 Ring-off time: 40
8. Pooled delay: 450
F1 Help F3 Select Port F5 Previous Screen F7 Delete F9 Record
F2 Command F4 Local on/off F6 Next Screen F8 Add F10 Play
Enter any character.
```

To select your phone system

- 1 In the “Switch” field, type the first few characters of your phone system manufacturer’s name (for example, type `mi t` for Mitel), and press ENTER.
- 2 Type `y` to select the phone system offered, or type `n` to display the next match.
- 3 If the choices offered in the switch setup library do not include your phone system, type `def` to use the default phone system parameters.
- 4 When “Are you sure you want to initialize all switch parameters?” appears, type `y`. Default parameters for the phone system you selected will be automatically filled in on the switch setup screens.

Continued

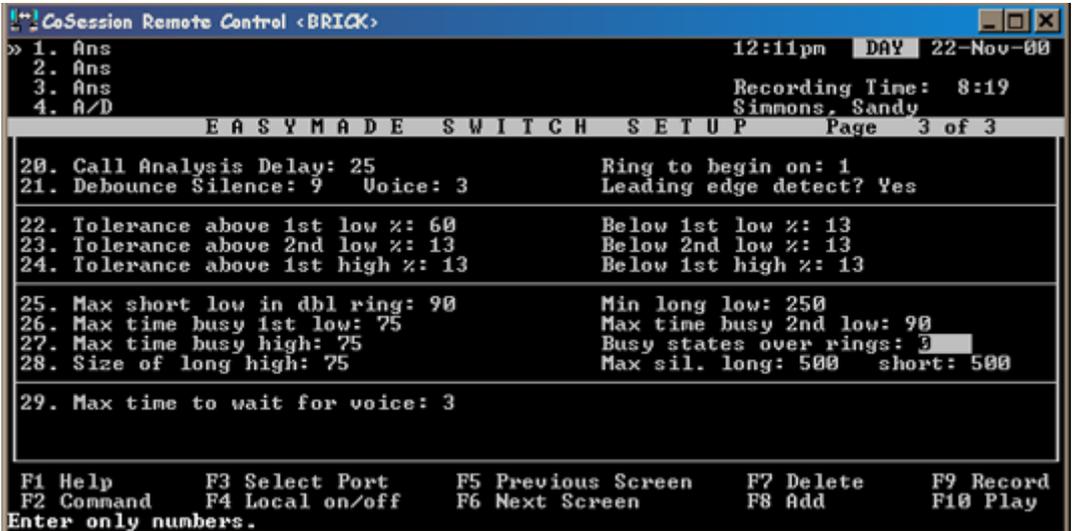
Switch setup screen page 2 includes additional voice messaging system options that allow you to control message waiting indicators, ports on hold, and the call-holding message cycle.



To confirm or change Switch Setup screen page 2 settings

- 1 On line 10, confirm that the message lamp settings are correct for your phone system. If your phone system requires a daily lamp reset, enter the reset time in the "Daily lamp reset" field.
- 2 The touchtone settings in lines 11 through 13 usually do not need to be changed. Call Technical Support if you are unsure about changing the values in these fields.
- 3 In the "Max lines holding total" field, type the number of ports that can be on hold for the entire system.
- 4 In the "Max lines holding for ext" field, type the number of ports that can be on hold for any single extension.
- 5 In the "Number tries between TT checks" field, type the number of times that you want the voice messaging system to try to transfer a call before checking back with the caller.
- 6 In the "Extra hold time between tries" field, type the time, in seconds, that you want the voice messaging system to wait before trying to transfer a call.

Switch Setup screen page 3 shows the call progress and voice detection settings that are provided for the phone system you selected on Switch Setup screen page 1.

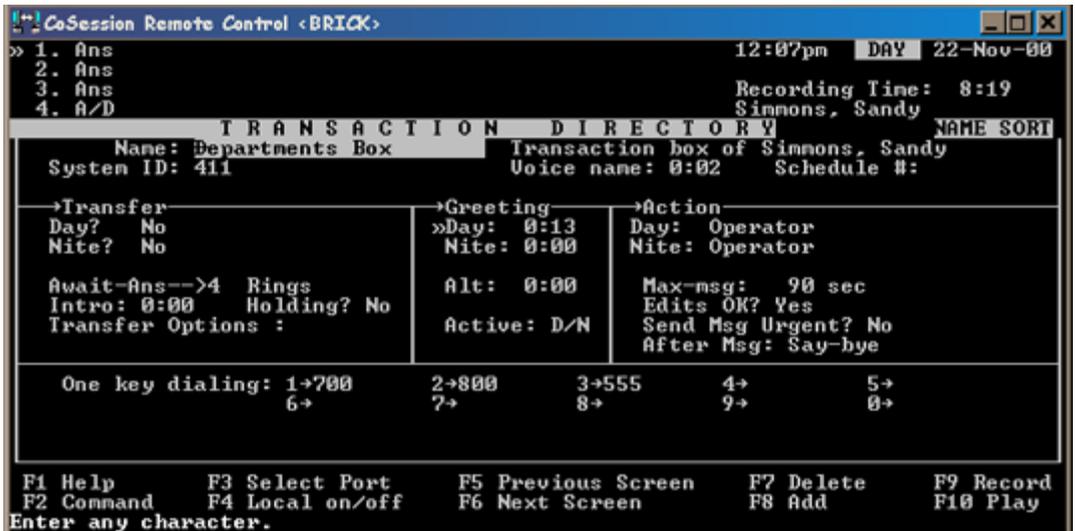


To confirm or change these settings, perform “To run Learn Tones,” on page 38.

Creating transaction boxes

The Transaction Directory screen allows you to create transaction boxes, which are the building blocks of the voice messaging system. A transaction box is a set of instructions that tells the system what to do when a call reaches the transaction box. You can use transaction boxes to set up specialized call routing, create menus, or provide announcements of prerecorded information.

Before adding a transaction box, determine which subscriber (or the system manager) will own the box. The owner receives messages for the box when you set the box to take messages. If you delete the owner, this box is automatically deleted.



The transfer-greeting-action structure

Each transaction box (except the interview box) has a transfer-greeting-action structure. If call transfer is turned on, the system first tries to transfer a call to the phone number or extension listed. If the call transfer is unsuccessful, the system plays the appropriate greeting for the box, and then follows the instructions in the Action section of the screen.

A transaction box can be set up for two different transfer-greeting-action sequences, one for day mode, the other for night mode.

To add a transaction box

- 1 Go to the Transaction Directory screen and press F8.
- 2 From the Add menu, select “Transaction box” and press ENTER.
- 3 From the dialog box that opens, assign an owner by doing one of the following:
 - Press ENTER to assign ownership to the voice messaging system manager.
 - Type *n* to choose a different owner. Type the owner’s last name, and press ENTER.
 - To create a delete-proof box, create a virtual subscriber and make him or her the owner of the box. Tell the real subscriber who will maintain the box the personal ID of the virtual subscriber.
- 4 Type a system ID for the box, and press ENTER.
- 5 Type a name for the box, and press ENTER. You may want to use a special naming convention for different types of transaction boxes to keep them sorted together onscreen, such as starting all box names with “TBOX.”
- 6 At the Transaction Box screen, in the “Voice name” field, record the name of the transaction box. See “Recording greetings and prompts,” on page 32 for more information.
- 7 In the “Schedule #” field, type the applicable schedule number. If you do not enter a schedule number, the system uses the schedule of the port the call came in on.
- 8 Set up call transfer for the transaction box.
- 9 Set up greetings for the transaction box.
- 10 Set up the actions that should occur after the greeting for the transaction box.

Continued

Adding a range of transaction boxes

To speed up the process of adding transaction boxes, you can add several transaction boxes at the same time.

To add a range of transaction boxes

- 1 Go to the Transaction Directory screen. If possible, go to an existing transaction box that has the transfer and action settings that you want. Press F8.
- 2 From the Add menu, select “Range” and press ENTER.
- 3 From the dialog box that opens, assign an owner to the boxes by doing one of the following:
 - Press ENTER to assign ownership to the voice messaging system manager.
 - Type `n` to choose a different owner. Type the owner’s last name, and press ENTER.
- 4 In the “Start” field, type the starting system ID, and press ENTER.
- 5 Type the ending system ID, and press ENTER.
- 6 It is not necessary to type anything in the “Constant prefix” or “Constant suffix” fields. Press ENTER.
- 7 When you are satisfied with the range you have selected, type `y`.
- 8 When prompted, press any key or ENTER to continue.
- 9 When the voice messaging system has finished adding the range, press PAGE UP or PAGE DOWN until you find the new boxes in the Transaction Directory.
- 10 If you want, type a new name for each box to replace the system-generated one.
- 11 Record greetings for each box.

Deleting a transaction box or its messages

If you delete a transaction box, make sure to delete all references to its system ID. The messages are automatically deleted.

To delete a transaction box or its messages

- 1 Go to the Transaction Directory, and press PAGE UP or PAGE DOWN to go to the transaction box you want to delete.
- 2 Press F7. From the Delete menu, select either “Box” or “All messages.”
- 3 Press ENTER to confirm.

Continued

One-key dialing

With one-key dialing, you can offer callers a menu of choices. One-key dialing enables you to program a single digit to represent the full system ID for a subscriber's extension ID, a transaction box, or an inter-view box. Instead of entering the full system ID, the caller just presses a single key.

Callers can bypass one-key dialing. You set the system to pause a certain number of seconds for additional touchtones before routing the call according to the transaction box's one-key dialing menu. These pauses allow callers to press full system IDs to bypass one-key dialing, even during a greeting. You program how long the system waits between touchtones using the "One-key delay" field.

To set up one-key dialing for a transaction box

- 1 Go to the Transaction Directory screen for the box .
- 2 If necessary, rerecord the box greeting so that it describes the one-key dialing choices.
- 3 In the "One-key dialing" fields, type the system IDs to which you want to route callers.
- 4 In the "Day" and "Night" fields of the Action section of the screen, type the code for the action that you want to occur when a caller does not press a touchtone key. Press ENTER.

In most cases, type `o` (Go to the operator). This setting transfers the call to the operator when the caller presses an incorrect key or does not press a key. The `O` setting also transfers callers without a touchtone phone to the operator. See the field descriptions in online Help for a list of action codes.

- 5 Go to Application screen page 6. In the "Startup" field, type `ok1` or `ok2`. This setting creates a 1- or 2-second pause that lets callers bypass the one-key dialing options and enter full system IDs instead.

Setting up an interview box

You use an interview box to give information to or collect information from callers, even during nonbusiness hours. For example, a business could use interview boxes to take sales orders or to conduct market research.

An interview box can contain up to 20 questions or announcements. Each interview box has an owner, a name, and a unique system ID. Messages left at an interview box are available only to the owner of the box. If you delete the owner, the interview box is automatically deleted.

If the customer will be collecting information, set up the interview box to record responses to interview questions. The system beeps after each question to prompt callers to respond, and you can specify the maximum recording length of each response to a question. When the interview box's owner retrieves the messages, the owner hears the callers' replies with a beep separating each response.

Before setting up an interview box, it is helpful to write out the text of the questions with the system manager. For each question, decide the number of seconds a caller's response can last. The questions can include introductory statements or other information. It is also helpful to decide how a caller will be routed to the interview box. A caller can be routed to an interview box in either of the following ways:

- You can set the "After" field for another box (for example, a transaction box, opening box, personal directory box, or interview box) to route a caller to the interview box's system ID (for example, GotoID-->\$PM).
- You can also set up a one-key dialing menu, where the system ID for the interview box is assigned to a single key. The caller can press the system ID for the interview box. Include the system ID in the opening greeting so that callers know how to reach the interview box.

Continued

To set up an interview box

- 1 Go to the Transaction Directory screen and press F8.
- 2 From the Add menu, select “Interview box” and press ENTER.
- 3 From the dialog box that opens, assign an owner to the interview box by doing one of the following:
 - Press ENTER to assign ownership to the voice messaging system manager.
 - Type `n` to choose a different owner. Type the owner’s last name, and press ENTER.
- 4 Type a system ID for the interview box, and press ENTER.
- 5 Type a name for the interview box and press ENTER.
- 6 In the “Voice name” field, record the interview box name.
- 7 In the first “Question” field, record the first interview box question. See “Recording greetings and prompts,” on page 32 for more information.
- 8 To make the first question an introduction, set the “Reply” field to 0 (zero) seconds so that the interview proceeds immediately from the introduction to the first question. Press ENTER.
- 9 In the subsequent “Question” fields, record the remaining questions.
- 10 For each question, in the “Reply” field, type an appropriate amount of time (in seconds) for the caller’s response. Press ENTER.
- 11 In the “Send msg urgent?” field, type the appropriate value.
- 12 In the “After” field, type the appropriate value for the action that should be taken after the interview is completed.

To delete an interview box or its message

- 1 Go to the transaction box in the Transaction Directory and press F7.
- 2 From the Delete menu, select either "Box" or "All messages," and press ENTER.
- 3 Press ENTER to confirm.

Messages are automatically deleted according to the box owner's hold/archive times set in the "Hold/archive msg" fields.

When you delete an interview box, make sure you delete all references to its system ID.

Public interview box

The public interview box is a special interview box in the Transaction directory. Messages left in the public interview box (as well as those left in the operator box) are public messages, which are available to all subscribers with public message access. The voice messaging system can have only one public interview box.

Typically, the public interview box is used to handle calls that are intended for the operator but go unanswered. The public interview box asks a caller for his or her name, phone number, and a brief message. However, the use of this box is not restricted to just this purpose.

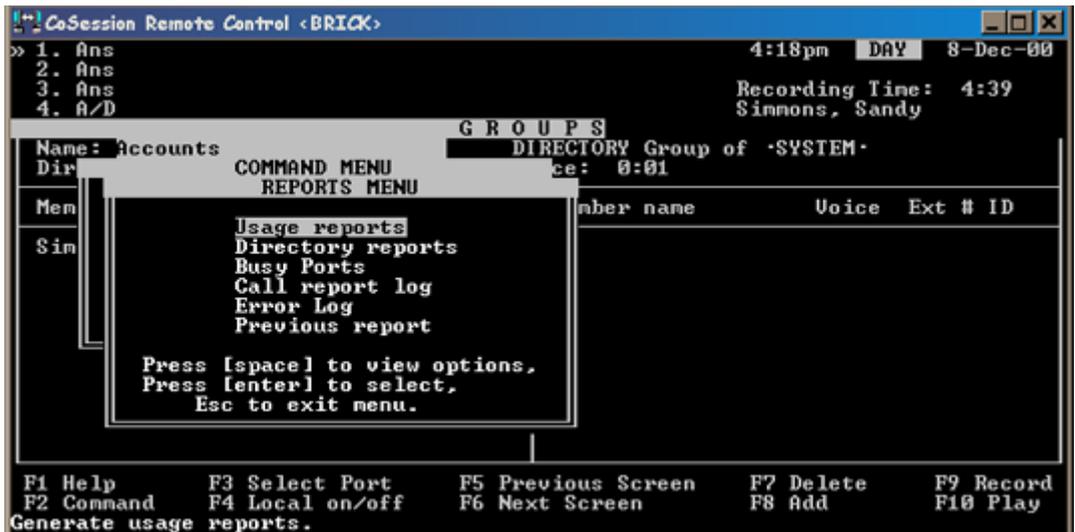
You set up the public interview box in the same way you set up a regular interview box. However, in addition to the fields on the Public Interview Box screen, the fields on line 51 of Application screen page 6 also control this box.

The public interview box comes with a default system ID of \$PM. You can change this ID, but you cannot delete the public interview box or add a new one. If you do change the system ID, you must also change all references to the deleted ID. This system ID is typically used with the "GotoID-->" action set on other system screens.

System managers and operators may not want the system to call them or light their message waiting lamps if the only messages they have waiting are public messages. You can add the C access code to the "Access" field on their personal directory pages to have the system light their message waiting lamps only when they have new messages specifically addressed to them.

Using reports to monitor the system

The voice messaging system provides five different categories of reports: usage, directory, ports, call log, and error log. Reports that you create for customer systems can be viewed on the console, printed on a printer connected to your computer, saved to a disk, or imported into spreadsheet or word processing files.



Standard voice messaging reports

Title	Selection and sort criteria	Format	Output file name
Usage report	Subscribers, extensions, system IDs	Graph	Graph.rpt
Usage report	Subscribers, extensions, system IDs	Table	Table.rpt
Directory report	Subscribers	Table	Subscrib.rpt
Directory report	Extensions	Table	Extensio.rpt
Directory report	Message groups	Table	Groupplis.rpt
Directory report	Members in groups	Table	Groupmem.rpt
Directory report	Subscribers	Table	Membersh.rpt
Directory report	Directory assistance	Table	Dalist.rpt
Busy ports report	Ports	Table	Busypor.rpt
Call log	Subscribers	Table	Replog.prn
Error log	Date	Table	Errlog.rpt

Using reports to monitor your system

You can use the voice messaging system console to view a report or to view the contents of a text file.

To view a previously created report or text file

- 1 From any voice messaging system screen, press F2.
- 2 From the Command menu, select "Reports" and press ENTER.
- 3 Select "Previous report" and press ENTER.
- 4 Type the full path and file name of the report or text file you want to view, and press ENTER.
- 5 Select "Display," "Copy," or "Print," and press ENTER.

If you select "Display," you can search the report by pressing CTRL+J and entering the text you want to search for.

If you select "Copy," the voice messaging system offers a default file name and directory. You can use the Copy command to save the report with a different name, as described in step 6.

To use the "Print" option, a printer must be properly configured and connected to the voice messaging system computer.

- 6 If you selected "Copy," you can save the report by doing one of the following:

To save the report output for use or printing on another workstation, specify a new file name for the report and save the file to a disk. When you save your report to a disk, the voice messaging system automatically replaces the old version of each report with a new version whenever you create a new report.

To save an old report, rename it or copy it to a different file or directory before creating the same report again.

Continued

Source data for reports

Each day, the voice messaging system creates data files containing information about actions and call traffic. The data is used when you generate reports. You can set the number of days that the voice messaging system stores these files. The voice messaging system deletes the files at midnight on the day that they expire. You can store the files for up to 365 days.

You specify start and stop dates when creating some reports. Your report contains data only for the number of days in the “Call report aging” field on line 50 of Application screen page 6.

Evaluating voice messaging system usage

Usage reports show you patterns of voice messaging system activity over time. A usage report can contain data about the entire voice messaging system or be limited to incoming and outgoing calls, subscribers, groups, and boxes. Usage reports can be formatted as bar graphs or tables. You can specify a range of days to be covered by the report. In a usage report, the term “day” represents the hours between 6:00 A.M. and 6:00 P.M. and the term “night” represents the hours between 6:00 P.M. and 6:00 A.M.

To create a usage report

- 1 From any screen in the voice messaging system, press F2.
- 2 From the Command menu, select “Reports” and press ENTER.
- 3 From the Reports menu, select “Usage” and press ENTER.
- 4 To create a report about how the entire voice messaging system is used, type `n` and press ENTER. Skip to step 6.
- 5 To create a report on use of the voice messaging system for an individual guest, subscriber, extension ID, or system ID, type `y` and press ENTER. Continue with step 5.
- 6 For a single guest or subscriber, type the person’s last name, and press ENTER.
- 7 For an extension ID or a system ID, type the ID, and press ENTER.
- 8 A dialog box will ask for confirmation of the name or ID. Type `y` to confirm your selection.
- 9 Type the report start date (using `d-mmm` format), and press ENTER.

- 10 Type the report end date (using d-mmm format), and press ENTER.
- 11 From the menu, select “Graph of usage” or “Table of usage” and press ENTER.
- 12 From the menu, select “Display,” “Copy,” or “Print” and press ENTER.

Analyzing port usage

The busy ports report lets you evaluate the load on your ports. You can use information from the busy ports report to make decisions regarding port management and adding ports.

The busy ports report shows the total number of times all or selected ports were busy. It also shows the average percentage of time the ports were busy during a specific time period. You can create the report for all ports on the system or for a selected group of ports.

If all or nearly all of your ports are busy during peak hours, external callers may not get through unless they let the ring continue until a port becomes free.

To create a busy ports report

- 1 From any voice messaging system screen, press F2.
- 2 From the Command menu, select “Reports” and press ENTER.
- 3 From the Reports menu, select “Busy ports” and press ENTER.
- 4 Type the report start date (using d-mmm format), and press ENTER.
- 5 Type the report end date (using d-mmm format), and press ENTER.
- 6 Select the ports you want to include in the report. For all ports, press ENTER.
- 7 To select a specific port or ports, type port numbers separated by commas (for example, 1, 3, 6), or type a range of ports separated by a hyphen (for example, 1-5). Press ENTER.
- 8 From the menu, select “Display,” “Copy,” or “Print” and press ENTER.

Recording greetings and prompts

An important part of customizing Lingo is helping the system manager design and make recordings for the opening greeting, one key dialing menus, operator box, interview boxes, and transaction boxes.

To listen to a recording (including one that you have just made)

- 1 Establish a local connection.
- 2 Move the cursor to the field that contains the recording you want to listen to.
- 3 Press F10 to play the recording.
- 4 If you want to stop the recording before it finishes playing, press END.

To make a recording

- 1 Establish a local connection.
- 2 Go to the screen that contains the voice field whose recording you want to change, select that voice field, and then press F9.
- 3 Press the SPACEBAR to start recording. After the beep, speak into the phone handset.
- 4 When you are finished, press the SPACEBAR to stop. The length of the recording appears in seconds in the voice field. A new recording replaces an existing recording, even if the new one is shorter.
- 5 Press F10 to listen to your recording.
- 6 Repeat steps 2 through 5 for each recording you want to add or change.
- 7 When you are finished, terminate the local connection.

Copying or appending a recording to a voice field

You can copy a recording to a voice field or append a recording to the end of an existing recording. If you copy a recording to a voice field, the new recording replaces the recording already in the voice field.

You can add a beep to the end of a recording to tell the caller when to begin speaking. You can also copy silence to a recording to replace the recording. Appending silence to the end of a recording is useful for recordings that ask a caller to press a key. Appending silence at the end of the prompt, rather than just pausing, usually results in a higher-quality recording.

To copy or append a recording to a voice field

- 1 Go to the screen that contains the voice field you want to copy or append a recording to, select that voice field, and press F2.
- 2 From the Command menu, select "Copy" and press ENTER.
- 3 From the Copy menu, select "Into current field" and press ENTER.
- 4 Type the full path and file name of the file you want to copy or append and press ENTER. (If you are copying from a compact disc or floppy disk, include the drive letter.)
- 5 If a recording already exists in this field, type `r` to replace the recording or `a` to append the recording to the existing recording.

To append a beep

- 1 Go to the screen that contains the voice field that you want to append a beep to, select that voice field, and press F2.
- 2 From the Command menu, select "Copy" and press ENTER.
- 3 From the Copy menu, select "Into current field" and press ENTER.
- 4 Type `beep` and press ENTER.
- 5 Type `a` to append the beep to the end of the recording.

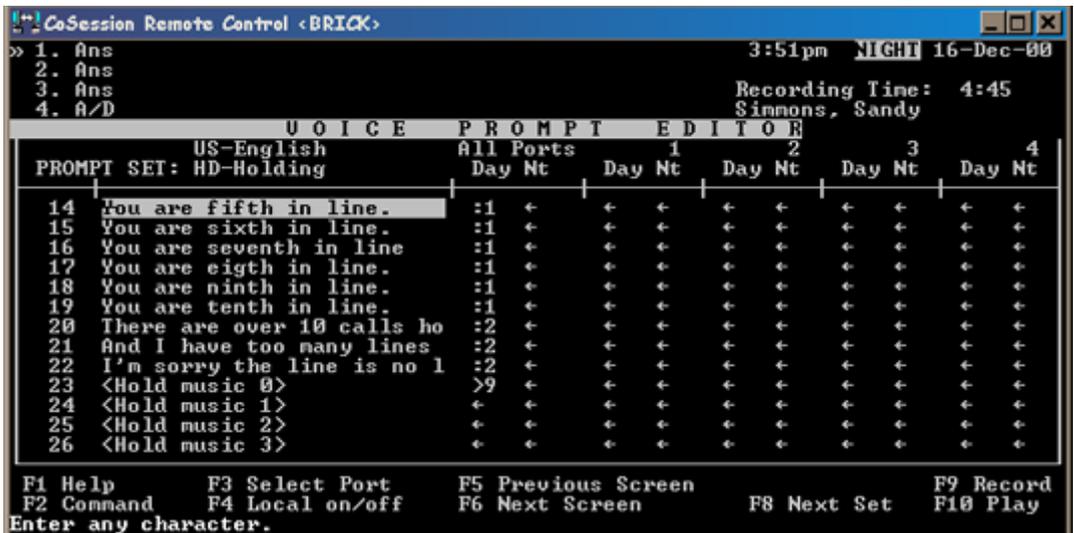
Continued

To copy or append silence to a recording

- 1 Go to the screen that you want to copy or append silence to, select that voice field, and press F2.
- 2 From the Command menu, select “Copy” and press ENTER.
- 3 From the Copy menu, select “Into current field” and press ENTER.
- 4 Type `silence` and press ENTER.

If the voice field already contains a recording, the voice messaging system asks if you want to replace or append the recording. Type `r` to replace the recording with silence, or type `a` to append silence to the end of the recording.

This procedure copies or appends 1 second of silence. For a longer pause, repeat the procedure until you append as many seconds of silence as you want.



Setting up on-hold prompts

The music-on-hold prompts can contain music of your choice, promotional messages, or information about the use of call holding.

The system has 10 prompts available for playing music to callers second in line or farther back in the holding queue. The first caller in the queue is on hold with the phone system, rather than with the voice messaging system, and hears the music-on-hold provided by the phone system. The music-on-hold prompt numbers are HD023 through HD032, located in the Holding (HD) prompt set.

The first music-on-hold prompt comes with your system. It contains piano music by Mozart. You can use the Mozart prompt and the remaining music-on-hold prompt numbers to record additional music-on-hold prompts. See “To make a recording” on page 32.

If multiple music-on-hold prompts are recorded, the system cycles through the prompts. When the voice messaging system finishes playing one music-on-hold prompt, it asks the caller whether he or she wants to continue to hold, then plays the next music-on-hold prompt in the series.

When recording music-on-hold prompts, note that the length of the prompt determines the length of the message holding cycle for the caller who is second in line or farther back. Prompts between 20 and 60 seconds in length work well. If the music-on-hold prompts are too short, the caller will be asked too frequently to press a key to remain on hold. If the prompts are too long, the caller may get tired of holding and hang up.

The length of the message cycle for callers who are first in line in the holding queue is controlled by fields on line 15 of the Switch Setup screen page 2. For additional callers in the queue, the message cycle is determined by the length of each of the 10 music-on-hold prompts.

Continued

To set up the hold-time message cycle for callers who are farther back in the queue

- 1 Press Ctrl+P to go to the Voice Prompt Editor screen.
- 2 Press F8 to go to the holding (HD) prompt set, and press PAGE DOWN to locate the music-on-hold prompts.
- 3 Because the first music-on-hold prompt is already recorded, record the other nine prompts with music or promotional messages. See “To make a recording” on page 32.

Testing the system after installation

Test each extension to confirm that the phone system is programmed correctly.

What you need for the test:

- A standard analog phone set with a ringer to use as a test set.
- A system manager's phone set.
- Access to a line outside of the phone system

To test the extensions

- 1 Connect the phone system to the test phone set and the system manager's phone set using lines designated as a voice messaging system extensions.
- 2 Confirm that the phone system identifies DTMF dialing through the test extension. Dial the system manager phone set from the test phone. The system manager phone should ring.
- 3 Confirm that the phone system transmits DTMF tones to the test extension. Dial the system manager phone from the test phone. Answer the system manager phone and enter a digit. You should hear the tone on the test phone.
- 4 Confirm that the test phone can access outside lines. Dial a number outside of the phone system from the test phone. You should reach the number.
- 5 Confirm that the phone system generates rings on the test extension. From the system manager phone, dial the test phone's extension. The test phone should ring.
- 6 Confirm that trunk routing is set up correctly for extensions that answer trunk calls. From a line outside the phone system, dial the number designated for the voice messaging system. Answer the test phone and perform a hookflash (timed break recall); then dial the system manager phone, listen for ringing, and disconnect. The call should be transferred to the system manager phone.

Running the Learn Tones utility

The Learn Tones utility tests the busy, reorder, and dial tones from the phone system, and saves the correct frequency, cadence, and length for each. Run the Learn Tones utility when you first install Lingo, and any time thereafter to resolve voice messaging system tone detection problems.

To run Learn Tones

- 1 Set up two phones within reach of the computer used for voice messaging system maintenance. Designate one of these phones as the test extension, set it to ring-no-answer, and place it in a busy state.
- 2 Connect to the voice messaging system using CoSession.
- 3 Press ESC from the voice messaging system Banner screen.
- 4 Type `y` to exit from the voice messaging system and disconnect all lines.
- 5 From the Utility menu, type `5` to choose “Learn tones (GTD and call progress).”
- 6 If the voice messaging directory prompt appears, type `di sk ut i l` and press ENTER.
- 7 From the Learn Tones menu, type `1` to choose “Learn GTD tones.”
- 8 From the GTD menu, type `2` to choose “Switch busy.”
- 9 Type the test extension number and press ENTER.
- 10 During the test, the screen displays status messages and the results of the tests. If any of the tests are unsuccessful, perform step 11. If all or at least the majority of the tests are successful, continue with step 12.
- 11 From the GTD menu, type `8` to choose “Configure options.” Increase the number of “switch busy” test attempts to 9. Repeat step 8 and step 9. If all or at least the majority of the tests are successful, continue with step 12. If less than half of the tests are successful, call Technical Support.
- 12 Return the test extension to an idle state.
- 13 From the GTD menu, type `3` to choose “Reorder tone.”
- 14 Type the test extension number and press ENTER.

- 15 Each time the test extension rings, take it off hook and quickly hang up to generate a reorder tone.
- 16 During the test, the screen displays status messages and the results. If any of the tests are unsuccessful, perform step 17. If all or at least the majority of the tests are successful, continue with step 18.
- 17 From the GTD menu, type 8 to choose “Configure options.” Increase the number of “reorder” test attempts to 9, and repeat steps 13 through 15. If all or at least the majority of the tests are successful, then continue with step 18. If less than half of the tests are successful, call Technical Support.
- 18 From the GTD menu, type 4 to choose “Dial tone.”
- 19 During the test, the screen displays status messages and the results. If any of the tests are unsuccessful, perform step 20. If all of the tests are successful, continue with step 21.
- 20 From the GTD menu, type 8 to choose “Configure options.” Increase the number of “dial tone” test attempts to 9, and repeat step 18. If all or at least the majority of the tests are successful, continue with step 21. If less than half of the tests are successful, call Technical Support.
- 21 Type 5 to save the settings.
- 22 Type 0 (zero) to exit to the Utility menu.
- 23 From the Learn Tones menu, type 5 to choose “Learn tones.”
- 24 Type 2 to choose “Call progress tones.”
- 25 When “Ready to begin ring test” appears on the console screen, press ENTER to begin the ring tone test.
- 26 Type the test extension number and press ENTER. The test extension will ring many times. Do not answer the extension during the test.
- 27 When the ring tone test is complete, “Ready to begin busy test” appears on the console. If the test extension is still ringing after this message appears, take it off hook and hang up.

Continued

- 28** Place the test extension in a busy state.
- 29** Press ENTER to begin the busy tone test.
- 30** When the busy tone test is complete, the screen displays the results of the test. If all of the values on lines 22 through 24 are less than or equal to 75 percent, continue with step 31.

If any of the values on lines 22 through 24 are greater than 75 percent, repeat step 28 and step 29. After repeating the test, if the values are still greater than 75 percent, call Technical Support.

- 31** Type `y` to save the values.
- 32** From the Utility menu, type `8` to restart the voice messaging system.

Training

Receptionists and operators

The operator, or receptionist, is an advocate for the voice messaging system. The operator's attitude and comfort level with the system can have a significant influence on system acceptance by subscribers and external callers.

Hold operator training at a phone console identical to the one the operator uses. This means you will teach the operator at the customer site in most cases. It is crucial that the operator not handle calls during training. Forward calls to another phone or console, or have someone else handle calls while the operator is in training.

Teach the operator how to answer calls transferred from the system versus from direct phone lines. Sometimes there is no way to tell the difference between direct calls and system transfers. In this case, help the operator come up with a suitable phrase that can be used to answer all types of calls.

If the voice messaging system is used as an automated attendant, encourage the operator to tell callers the extension they are being transferred to. This will help educate frequent callers and lighten the operator's call load. The operator also must know how to transfer calls into voice mailboxes. The timing of the transfer is fairly critical on some phone systems, so have the operator practice a few times with you on the line as the caller.

While training the operator, look for ways to make things easier on the particular operator console. For example, you may be able to program speed-dial numbers or buttons to help the operator transfer calls to voice messaging.

Continued

System manager

A system manager needs a broad understanding of the voice messaging system, because he or she will be expected to respond to questions and provide one-on-one assistance. All system managers should be able to perform routine maintenance such as:

- Adding and deleting subscribers
- Rerecording greetings
- Modifying system settings by phone
- Creating new message groups
- Changing schedules

The system manager should be comfortable using the system as a subscriber and as an operator before receiving this advanced training.

The system manager training session should be at least one hour long and held on a functioning voice messaging system, preferably away from the customer site. The best location is usually the installer's office. If you must hold the training at the customer's site, the session should be away from the trainee's usual work space and kept free of interruptions.

Follow up

Make yourself available for several days after the training session to answer questions. Also, follow up in a week or so to check that the system manager and operators are comfortable with the system.

Maintaining the system

The Field Service Utility (FSU) allows an installer to back up, restore, or update the Lingo voice messaging system using a direct serial connection or a modem connection, without physically being on-site.

While the FSU replaces CoSession when performing backup, update, and restore functions, CoSession is still used for console access.

The FSU uses a host and a remote program. The host program resides on the voice messaging system, and the remote program runs on the installer's computer. Perform the following procedure to install FSU remote software on the computer you plan to use to access the voice messaging system.

To install FSU remote software:

- 1 On the computer you plan to use to access Lingo, open a DOS window and navigate to the root directory (C:\).
- 2 Insert the Lingo CD-ROM into the computer's CD-ROM drive.
- 3 At the C:\> prompt, type

```
d: \i nstal l \fsu\fsui nst -d
```

and press ENTER. The FSU remote program will be installed in the C:\FSU directory.

- 4 From the C:\FSU directory, type `FSU` to start the FSU remote program.

Enabling multiple languages

Lingo can have up to three different languages activated at the same time, allowing language assignment by port. For example, ports one and two can use English, port three German, and port four French.

Lingo systems can be purchased with one or three languages activated. For systems with only one language activated, a multiple language upgrade is available.

Contact Sales Support to purchase a language upgrade. You will be sent an activation code. After you have received the new activation code, perform the following procedures to activate the new languages.

System and port languages

The system language is the default language used for all ports and prompts, unless you choose another port-specific language. If you change the system language, it will replace all of the previous system language prompts with the new language prompts. The only exceptions are the OGM prompts, if you choose not to update them when you install the new language. OGM prompts are the system voice prompts, such as the day, night, and alternate greetings, box names, and transaction box greetings, that are typically customized for a site.

A port language is the language that is used for calls that come in on specified voice messaging ports. If a port does not have a language specified, it uses the system language.

To assign system and port languages

- 1 At the Utility menu screen, type **6** and press ENTER.
- 2 At the the Language Configuration Utility menu, type the number of the language that you want to assign as the system language and press ENTER.
- 3 Type the number of the language that you want to assign to port one.
- 4 Repeat step 3 for the remaining ports.
- 5 From the Utility menu, type **8** to exit the complete the language activation and restart the voice messaging system.

To install new languages

- 1 Exit the voice messaging system.
- 2 At the Utility menu screen, type 3 and press ENTER.
- 3 Start the FSU client program, and connect to the FSU host.
- 4 From the FSU Options menu, select "Install."
- 5 From the Installation Options menu, select "Partial install."
- 6 From the Partial Installation Options menu, select "System language prompts."
- 7 From the System Language Prompts menu, select the language that you want to install.

You will be asked if you want to update the OGMs. The most common answer for upgrades is "No." If you do choose to update OGMs, any of these voice prompts created by the customer will be replaced by default voice messaging system OGMs in the new language.

- 8 Follow the on-screen instructions to continue with the installation.

During the installation process, several error messages may be generated. It is safe to ignore these errors as long as the file transfer percentage eventually reaches 100%. If the file transfer percentage does not reach 100% or if the installation process stops for more than several minutes, press ESC and begin again at step 4.

- 9 When the new system language installation is complete, exit from the FSU.
- 10 Restart the voice messaging system.

Performing a port upgrade

Lingo systems can be configured for either two or four ports. Systems purchased with two ports can be upgraded to four ports by contacting Sales Support. When you purchase a port upgrade, you will receive an activation code. After you receive the new activation code, perform the following procedure to upgrade the system.

To activate additional ports

- 1 Exit the voice messaging system.
- 2 At the Utility menu screen, type `x` and press ENTER.
- 3 At the DOS prompt (C:\VMAIL,) type `keyupdat` and press ENTER. System information will be displayed, including the number of activated languages.
- 4 Type the new activation code and press ENTER. The system will be updated with the new port information.
- 5 Confirm that the system information displays the correct number of activated ports.
- 6 Press ESC to exit the Keyupdat program and restart the voice messaging system.

Troubleshooting

Basic troubleshooting can be done on-site by the system manager. See the *System Administration Guide* for common problems and solutions that you can resolve working with the system manager. Since the system manager typically does not have access to the voice messaging system console, more advanced troubleshooting is done using CoSession or equivalent remote access software, and resolved if necessary using the Field Service Utility.

General tone detection

One or more of the following situations indicates a problem with general tone detection (GTD).

- Calls collide during callout. For example, when the voice messaging system tries to dial out and a new call comes in at the same time, the caller hears dialed touchtones.
- Phantom calls go to the operator. This typically occurs when a caller hangs up during the opening greeting and the call is transferred to the operator.
- Dial tones appear in messages in voice mailboxes.

To activate general tone detection

- 1 Go to line 2 on Switch Setup screen page 1.
- 2 In the “Integration options” field, type `ct` and press ENTER.
- 3 If this does not correct the problem, perform the procedure “To run Learn Tones” on page 38.