

USER REFERENCE MANUAL  
for Serenade™ Telephone User Interface (TUI)

OCTEL MESSAGING DIVISION





## THE POWER OF MESSAGING

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With voice messaging people don't have to be available and connected at the same time to communicate. Voice messages that you exchange with others preserve the nuances only the human voice can convey. Voice messaging helps you increase your productivity and communicate effectively from any touchtone phone 24 hours a day, with one person or many. In a single call you can:

- Send messages and send copies of messages to others
- Review, reply to and save voice and fax messages
- Record a single, detailed message and broadcast it to dozens of colleagues
- Print faxes you receive in your mailbox to any fax device (if you have the fax feature)

With the Octel® system, your schedule—and that of your colleagues—no longer affects your ability to communicate. You can take advantage of a business tool that lets you accomplish more in less time. This is the power of messaging.

Use the Octel system to send and receive messages simply by entering your voice mailbox and following the directions you hear. This manual supplements the spoken directions and describes Octel system features in detail. It explains how to:

- Enter, set up and exit your voice mailbox
- Record a message, address it to one or more recipients and select addressing options such as notification of receipt, urgent, private or future delivery
- Retrieve messages; scan your message queue by listening to the names of the senders; and respond to messages by saving, forwarding a copy, deleting or sending a message in reply
- Send and receive fax messages
- Set up custom options such as greetings, personal distribution lists and forwarding calls to a personal assistant
- Explain the system to your callers

**NOTE:** *Depending on the way your system is set up some features may not be available to you and you will not be prompted for those options. In addition, your telephone system may not support some features.*

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## CONVENTIONS

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- 5 Numbers appearing in clear boxes are keys that you press on your telephone keypad. For example, 5 means press the number 5 key; \* 5 means press the star key at the bottom left of your keypad, then press the 5 key.
- 5 Numbers appearing in solid boxes are choices that you select from the Ready prompt.
- ◇ Features marked with the symbol ◇ are optional features that may not currently be available for your system or mailbox. Contact your system administrator to find out if a specific feature is available.
- ▶ A step in a series of steps is preceded by the symbol ▶.

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# CHAPTER 1

## ENTERING AND EXITING THE SYSTEM

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*In this chapter:*

- Setting up your Octel mailbox
- Entering the system
- Exiting the system
- Using letters to remember actions

To begin using the Octel system, you need the following information:

- The phone number for the Octel system
- Your mailbox number
- The temporary security code

The system may prompt you to:

- Exchange your pre-assigned, temporary security code for a personal security code.
- Record your name, which the system plays to callers who enter your mailbox number. The system does not ask you to record your name if the system administrator has recorded it for you.
- Record a personal greeting.

### Entering your mailbox for the first time from any touchtone phone

- ▶ Call the Octel system telephone number
- ▶ Press **#** to indicate that you have a mailbox on the system
- ▶ Enter your mailbox number
- ▶ Enter your temporary security code

Follow additional spoken instructions to set up your mailbox:

- ▶ Enter a new security code containing up to 10 digits, then press **#**
- ▶ Confirm the security code by entering it again
- ▶ Record your name
- ▶ Record a personal greeting
  - To rerecord your name, see *“Rerecording your name,”* page 44.
  - To change your personal greeting, see *“Recording greetings,”* page 39.
  - To change your security code, see *“Changing your security code,”* page 45.

## ENTERING THE SYSTEM

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### Entering your mailbox from your extension on an integrated system

- ▶ Call the Octel system phone number
- ◊ ▶ Press **#** **#** and enter your security code  
or  
Enter your security code

The system responds, “Ready.” You may now listen to or send messages, change your personal greeting, change your security code or perform other tasks.

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**TIP: Getting help while in your mailbox**

*You can hear instructions about most features of the Octel system.*

- ▶ To listen to help about the current feature **0**
- ▶ To hear a list of features **0 0**

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**TIP: Performing multiple tasks while in your mailbox**

*After you complete each task the system returns you to the “Ready” prompt. You must initiate each new task from Ready.*

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- ▶ Call the Octel system phone number
- ▶ Press **#** to indicate that you have a mailbox on the system at any time during the system introduction
- ▶ Enter your mailbox number
- ▶ Enter your security code

The system responds, “Ready.” You may now listen to or send messages, change your personal greeting, change your security code or perform other tasks.

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**TIP: Making credit card calls**

*If you call the Octel system using a telephone credit card and press **#** too quickly, the telephone company may interpret your action to mean you want to place another credit card call. If this occurs, wait until the system’s introductory prompt is finished before you press **#**.*

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## EXITING THE SYSTEM

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Exit your mailbox rather than simply hanging up. If you hang up you may have to wait a short time before you can re-enter your mailbox.

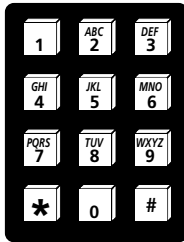
To exit the Octel system:

- ▶ Indicate you want to exit your mailbox **9**
- ▶ Select an end-of-session option:
  - Delete messages marked for erasure and receive new messages that arrived during the session **#**
  - Delete messages marked for erasure and hang up **9**
  - Delete messages marked for erasure and make another call or enter another mailbox number **0**
  - Cancel exit and return to Ready **\***

## USING LETTERS TO REMEMBER ACTIONS

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You can initiate some actions by pressing the first letter of the action—for example, L (5) for Listen. The following table shows some letter commands you can use with your mailbox.



Action	Key	Letter
Listen to next message	5	L
Message (Send)	6	M
Erase	3	E
Save	7	S
Reply	1+7	1+R
Time	8	T
Back Up	2	B
Go Forward in message	4	G
Immediately call	1+4	1+I
Forward Message	1+3	1+F

# CHAPTER 2

## RECORDING AND SENDING VOICE MESSAGES

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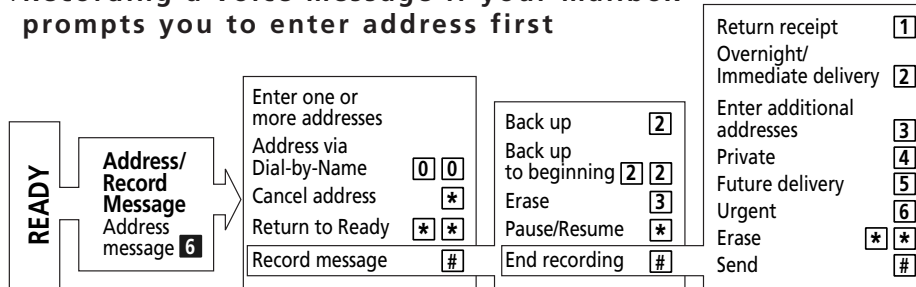
*In this chapter:*

- Recording, addressing and sending voice messages
- Selecting addressing options
- Listening to messages marked for future delivery
- Sending a message without entering your mailbox
- Using voice mail effectively

When sending a message, depending on your system, your mailbox first prompts you to enter the address or to record the message. You can send messages to up to ten of the following addresses:

- A mailbox on your system
- A mailbox on a system that is networked with your system
- A personal distribution list (*See "Managing personal distribution lists," page 52.*)
- A system distribution list that is maintained by the system administrator

## ◇ Recording a voice message if your mailbox prompts you to enter address first



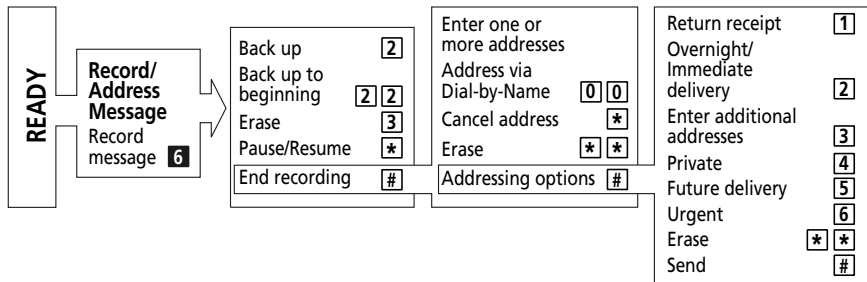
- ▶ Select Address Message **6**
- ▶ Enter up to ten addresses: either enter mailbox number or press **0 0** to spell name (*See "Spelling a name," page 10.*)  
Listen to the addressee's name  
Cancel the last address entered **\***
- ▶ When finished addressing **#**
- ▶ Record the message  
◇ The system alerts you when you have only 30 seconds of recording time remaining.
- ▶ While recording you may use recording controls  
Review the last several seconds **2**  
Review the entire message **2 2**  
Erase the message **3**  
Pause or resume recording **\***
- ▶ When finished recording **#**
- ▶ Select Addressing Options (if desired)  
(*See "Selecting addressing options," page 11.*)  
Enter additional addresses (if desired) **3**
- ▶ Erase message (if desired) **\* \***
- ▶ Send the message **#**

**NOTE:** Just as a letter placed in a postal box cannot be retrieved, a message cannot be retrieved once it is sent.

**TIP: When the destination mailbox is full**

When you try to send a message, you may be informed that a mailbox is full because it contains the maximum allowed number of messages or future delivery messages. In this case you must try later.

◇ **Recording a voice message if your mailbox prompts you to record message first**



- ▶ Select Record Message **6**
- ▶ Record the message
  - ◇ The system alerts you when you have only 30 seconds of recording time remaining.
- ▶ While recording you may use recording controls
  - Review the last several seconds **2**
  - Review the entire message **2 2**
  - Erase the message **3**
  - Pause or resume recording **\***
- ▶ When finished recording **#**
- ▶ Enter up to ten addresses: either enter mailbox number or press **0 0** to spell name (See "Spelling a name," page 10.)
  - Listen to addressee's name
  - Cancel the last address entered **\***
- ▶ When finished addressing **#**
- ▶ Select Addressing Options (if desired) (See "Selecting addressing options," page 11.)
  - Enter additional addresses (if desired) **3**
- ▶ Erase message (if desired) **\* \***
- ▶ Send the message **#**

---

**NOTE:** *Just as a letter placed in a postal box cannot be retrieved, a message cannot be retrieved once it is sent.*

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**TIP: When the destination mailbox is full**

*When you try to send a message you may be informed that a mailbox is full because it contains the maximum allowed number of messages or future delivery messages. In this case you must try later.*

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## Spelling a name

If you don't know a user's mailbox number, you can spell the person's name, last name first, as follows:

A, B, C	=	<input type="text" value="2"/>
D, E, F	=	<input type="text" value="3"/>
G, H, I	=	<input type="text" value="4"/>
J, K, L	=	<input type="text" value="5"/>
M, N, O	=	<input type="text" value="6"/>
P, Q, R, S	=	<input type="text" value="7"/>
T, U, V	=	<input type="text" value="8"/>
W, X, Y, Z	=	<input type="text" value="9"/>

For example, to address a message to Smith, Ann, enter **76484266**.

◇ If you are unsure of the spelling, enter  in place of any letter in the name.

When you have entered enough characters to identify a user's name, press . The system states the name. If more than one name matches the characters you have entered, the system presents those names one at a time and asks you to select the one you want.

To spell a name:

- ▶ Indicate you want to spell name
- ▶ Spell name
- ▶ Press
- ▶ Listen to an addressee's name  
Select that address   
or  
Ask to listen to another  
addressee's name

## SELECTING ADDRESSING OPTIONS

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Select any combination of the following addressing options after addressing and recording the message.

### ◇ **Requesting return receipt** [1]

When you request return receipt, the system notifies you when a recipient listens to a message sent from your mailbox. The notification to you is a message that begins with “Return receipt,” provides the recipient’s name and plays the message you originally sent. If the return receipt is from a message sent over the network, the system plays only the first 20 seconds of your original message.

While listening to a return receipt message, press [8] to hear the time and date the recipient listened to your message.

### ◇ **Requesting overnight/immediate delivery** [2]

This option is available only if you are sending a networked message to another messaging system. The default setting for your mailbox is either overnight or immediate delivery. When you select this option, you change the delivery to the non-default mode.

### ◇ **Sending to additional addresses** [3]

You may provide additional addresses before you press [#] to send the message.

- ◇ When replying to a message, you can select up to nine other addresses in addition to the address of the person who originally sent the message.

### ◇ **Marking a message as private** [4]

Messages that are marked as private cannot be forwarded to any other mailbox. The system informs the recipient that the message is private.

## ◇ Requesting future delivery [5]

You can schedule a message for future delivery up to one year after recording. Messages marked for future delivery are stored in your mailbox and can be reviewed or deleted any time prior to the scheduled delivery. To listen to and erase future delivery messages before they are sent, see *“Listening to messages marked for future delivery,”* page 13.

To request future delivery:

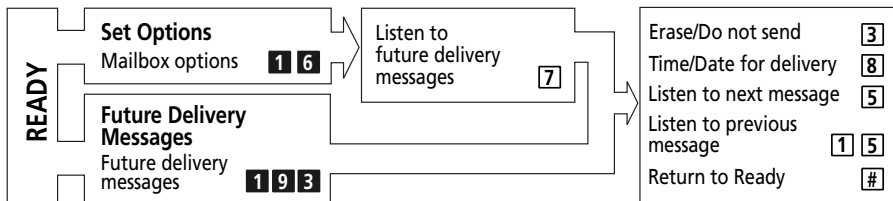
- ▶ Specify future delivery [5]
- ▶ Enter the month—for example, [0] [1] for January or [1] [2] for December
- ▶ Enter the day of the month—for example, [0] [4] for the 4th or [3] [1] for the 31st
- ▶ Enter [1] for a.m. or [2] for p.m.
- ▶ Enter the hour—for example, [0] [2] for 2:00

- ▶ Enter the minute—for example, [3] [0] for 2:30
- ▶ Confirm the time and date when prompted [#]

## ◇ Marking a message as urgent [6]

If you mark a message as urgent the recipient hears that an urgent message is in the mailbox and hears “marked urgent” at the beginning of your message. The urgent message will appear at the top of the recipient’s new message queue.

## LISTENING TO MESSAGES MARKED FOR FUTURE DELIVERY



You may listen to messages you have scheduled for future delivery at any time before they are sent, hear the time and date of scheduled delivery and optionally erase them.

- ▶ Select Future Delivery Messages **1 9 3**
  - The system indicates the number of future delivery messages in your mailbox
- ▶ Indicate which message you want to hear first:
  - First message in the queue **5**
  - Next message in the queue **5**
  - Previous message in the queue **1 5**
- ▶ Erase (if desired) **3**

**NOTE:** You can also listen to future delivery messages when you select the mailbox options menu:

- ▶ Select Mailbox Options **1 6**
- ▶ Select Listen to Future Delivery Messages **7**

### **TIP: Managing the number of messages in your mailbox**

Your mailbox holds a maximum number of messages. This number includes both received messages and messages you schedule for future delivery. To manage your mailbox effectively avoid storing unnecessary messages.

- ◇ You may record and send a quick message without entering your mailbox.

To record a quick message without entering your mailbox:

- ▶ Call the Octel system
- ▶ Indicate you want to record and send a message
- ▶ Enter the recipient's mailbox number
- ▶ Record your message
- ▶ Hang up

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**NOTE:** *You must enter the recipient's mailbox number when you send a quick message. You cannot spell the name instead.*

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- ◇ **NOTE:** *When you send a quick message from your extension, the recipient may hear your name at the beginning of the message as if you had sent it from your mailbox.*
- 

- ◇ With some types of networking you can send a quick message to a user on a remote Serenade system.

To record a quick message for a user on a networked system:

- ▶ Call your Octel system
- ▶ Dial the network access number of the remote system (ask your system administrator) and wait while you are transferred to the remote system
- ▶ Indicate you want to record and send a message
- ▶ Enter the remote recipient's mailbox number
- ▶ Record your message
- ▶ Hang up

## USING VOICE MAIL EFFECTIVELY

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Like any form of communication, voice mail is an art. Follow these guidelines to use voice mail most effectively.

- Identify the topic at the beginning of the message.
  - Address only one or two topics per message.
  - State the key point early. Don't surprise the user at the end of the message.
  - Be brief. Rerecord if you think your message is too long or confusing.
  - Keep content appropriate for business.
  - Talk face-to-face or write a memo if the topic is sensitive or complex.
- If the distribution list is long, name the recipients at the end.
  - Use the urgent addressing option with discretion.
  - Reply promptly to messages.
  - Make your requests for information complete and concise so the recipient can respond via voice mail.



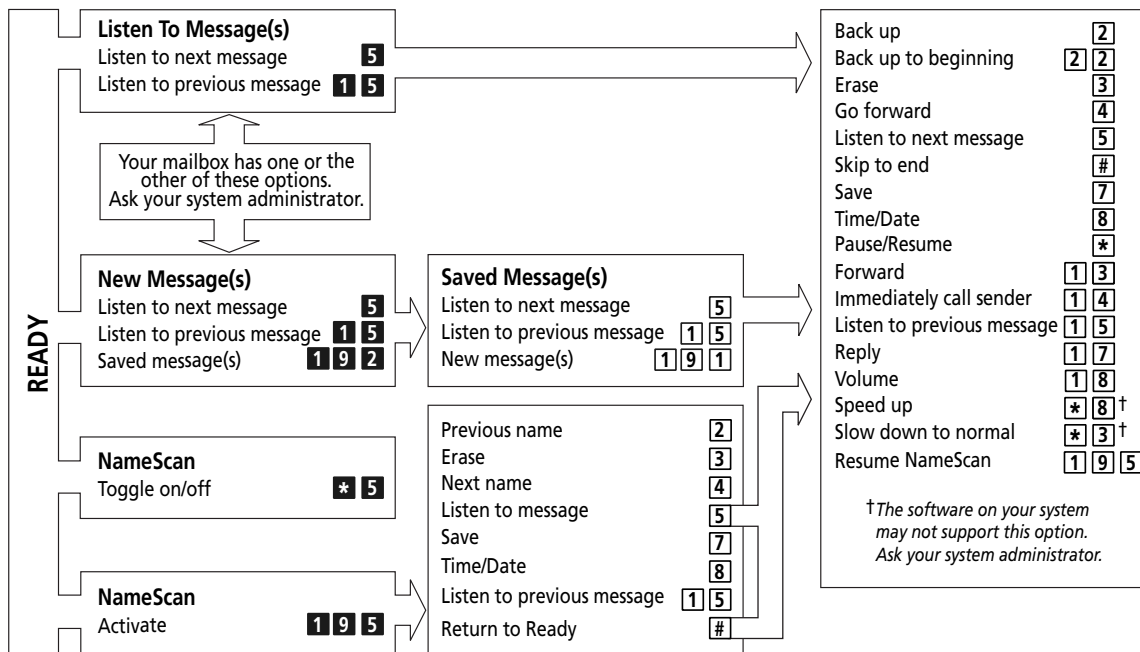
# CHAPTER 3

## LISTENING AND RESPONDING TO VOICE MESSAGES

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*In this chapter:*

- Listening to voice messages
- Scanning messages by senders' names
- Saving and erasing voice messages
- Responding to voice messages
- Using playback controls



## LISTENING TO VOICE MESSAGES

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Your mailbox is designed to present voice messages in one of two ways:

- In a single message queue with new and saved messages
- In separate queues for new messages and saved messages

### ◇ Listening to messages if you have a single message queue

If you have a single message queue, the following message plays when you enter your mailbox: “You have x urgent and y voice messages. Ready.” Urgent messages are played in the order they were received.

- ▶ Indicate which message you want to hear first:
  - First message in queue **5**
  - Last message in queue **1 5**
- ▶ Listen to another message:
  - Next message **5**
  - Previous message **1 5**
- ▶ Pause or resume at any time while a message is playing **\***

After each message, you hear one of the following prompts: “The message will be erased. Ready,” or “The message will be saved. Ready.” Which prompt you hear depends on your system.

- ◇ ▶ Hear the time and date a message was received **8**
- ▶ Cancel message review and return to Ready **#**

## ◇ Listening to messages if you have separate queues for new and saved messages

If you have separate queues for new and saved messages, the following message plays when you enter your mailbox: “You have x urgent, y new and z saved messages. Ready.” Urgent messages are played at the beginning of new messages.

- ▶ Select a message queue:

New message queue **5**

Saved message queue **1 9 2**

To return to new message queue

**1 9 1**

- ▶ Indicate which message you want to hear first:

First message in queue **5**

Last message in queue **1 5**

- ▶ From this starting point, listen to another message:

Next message **5**

Previous message **1 5**

- ▶ Pause or resume at any time while a message is playing **\***

◇ After each message, you hear one of the following prompts: “The message will be erased. Ready,” or “The message will be saved. Ready.” Which prompt you hear depends on how your system is set up.

- ◇ ▶ Hear the time and date a message was received **8**
- ▶ Cancel message review and return to Ready **#**

## SCANNING MESSAGES BY SENDERS' NAMES

◇ When you turn on the NameScan feature you can scan all new and saved messages in your mailbox by listening to the senders' names. This feature is helpful if you need to locate a message from a particular person quickly.

If the message was sent by a caller who is not on the Octel system the system states, "Call answering" instead of providing a name. If you received a message from a sender on the network whose name is not available the system states, "Networked message" followed by the sender's network address.

### ◇Turning the NameScan feature on or off

To turn NameScan on or off, press **\* 5**. The system then states whether NameScan is on or off.

### ◇Listening to senders' names

If NameScan is on, you can either listen to the names of senders from the Ready prompt or while listening to messages.

To scan messages by senders' names:

▶ Activate NameScan **1 9 5**

You can take the following actions while using NameScan:

- ▶ Listen to name of sender who sent next message **4**
- ▶ Listen to name of sender who sent previous message **2**
- ▶ Listen to next message **5**
- ▶ Listen to previous message **1 5**
- ▶ Play time and date message was sent **8**
- ▶ Reply **1 7**
- ▶ Erase message **3**
- ▶ Save message **7**
- ▶ Return to Ready **#**

### Saving a message

If your system saves messages by default, no special action is necessary to save.

- ◇ The system saves the messages until you delete them or until it is time for the system to purge them automatically.

If your system erases messages by default, save a message by pressing **[7]** during or immediately after the message.

If you forget to press **[7]** before moving to another message, you can return to a previous message by pressing **[1]** **[5]**. Listen to the beginning of the message again, then press **[7]** to save it.

### Erasing a message

If your system erases messages by default, no special action is necessary to erase; messages that you hear in their entirety are marked for erasure and erased when you end the session by exiting correctly, e.g. **[9]** **[9]**.

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**NOTE:** *If you “hang up,” the message will NOT be erased.*

---

If your system saves messages by default, mark a message for erasure by pressing **[3]** during or immediately after the message.

Either way, the message remains in your mailbox until the end of the session. You can listen to it again, respond or decide to save it while you are still in your mailbox.

---

## Erasing messages before you exit

To erase unsaved messages at the end of a session:

▶ Initiate exit **9**

▶ Select an exit option:

Delete messages marked for erasure and receive new messages that arrived during the session **#**

Delete messages marked for erasure and exit your mailbox **9**

Delete messages marked for erasure and make another call or enter another mailbox number **0**

---

**NOTE:** *You may cancel exit and return to Ready by pressing **\***.*

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**NOTE:** *If you press **3** to mark a message for erasure, it will be deleted regardless of how you exit the system.*

---

Voice mail is most effective if you respond to all messages immediately after hearing them. If your caller has requested information that you do not have, let the caller know when you will have the information, or forward the message to another contact person.

### Replying with a voice message

If you receive a message sent from a mailbox on your system or network you can reply to the message without having to hang up and redial.

To reply while listening to the message or immediately after listening to it:

- ▶ Select Reply **1** **7**
- ▶ Record your reply
- ▶ When finished recording **#**
- ▶ Select Addressing Options **#**  
(See “Selecting Addressing Options,”  
page 11.)
- ▶ Enter additional addresses (if desired) **3**
- ▶ Send the message **#**

### Replying by calling the sender

- ◊ If the sender has an extension on your Octel network, you may be able to call the extension by pressing **1** **4** during or immediately after the message. The system immediately transfers you. If the system knows the sender does not have an extension on the network, it prompts, “The extension number of this person is not known. Ready.”

If the sender is not known to the system, does not answer or the phone is busy, the system takes one of two actions. Some systems return you to your mailbox and prompt you to reply to the message. Other systems do not return you to your mailbox; instead, they prompt you to leave a message in the sender’s mailbox.

---

## Forwarding a message

Forward a copy of a voice message when others should hear it. Add comments so persons receiving copies know you forwarded it. You can send a copy of any message unless it has been marked as private by the sender. (See “*Selecting addressing options*,” page 11.)

To send a copy during or after listening to the message:

- ▶ Forward the message **[1] [3]**
  - ▶ Record your comments
  - ▶ Review your comments before sending (if desired) **[2] [2]**
  - ▶ When finished recording or if you choose not to record comments **[#]**
- ▶ Enter up to ten addresses; either enter mailbox number or press **[0] [0]** to spell the name (See “*Spelling a name*,” page 10.)
    - Listen to addressee’s name
    - Cancel the last address entered **[\*]**
  - ▶ When finished addressing **[#]**
  - ▶ Enter addressing options (if desired) (See “*Selecting addressing options*,” page 11.)
  - ▶ Send the message **[#]**

While messages are playing, use the keys on your telephone to back up, pause, fast forward, or control the volume and speed of message playback.

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To do this	Press these keys
------------	------------------

---

Back up several seconds	<b>[2]</b>
-------------------------	------------

Back up to beginning	<b>[2]</b> <b>[2]</b>
----------------------	-----------------------

Pause or resume	<b>[*]</b>
-----------------	------------

Fast forward several seconds	<b>[4]</b>
------------------------------	------------

Skip to end	<b>[#]</b>
-------------	------------

Adjust message volume	<b>[1]</b> <b>[8]</b>
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Speed up	<b>[*]</b> <b>[8]</b> or <b>[*]</b> <b>[8]</b> again for faster*
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Slow down to normal	<b>[*]</b> <b>[3]</b> or <b>[*]</b> <b>[3]</b> again for slower*
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\*The software on your system may not support this option. Ask your system administrator.

**NOTE:** When you use speed controls, pressing the **[\*]** key pauses the message to allow you to use the playback keys (**[8]** or **[3]**).

---

**NOTE:** Press **[#]** while listening to go to the end of a message. You will hear "Ready." At this point you can apply any message playback option to the message you just skipped, except **[4]** Go Forward. If the message is a forwarded message pressing **[#]** will take you to the end of the annotation that precedes the forwarded message. Press **[2]** to back up, or rewind, several seconds and continue playback until the forwarded message begins to play. Press **[#]** to skip to the end during playback of the forwarded message.

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# CHAPTER 4

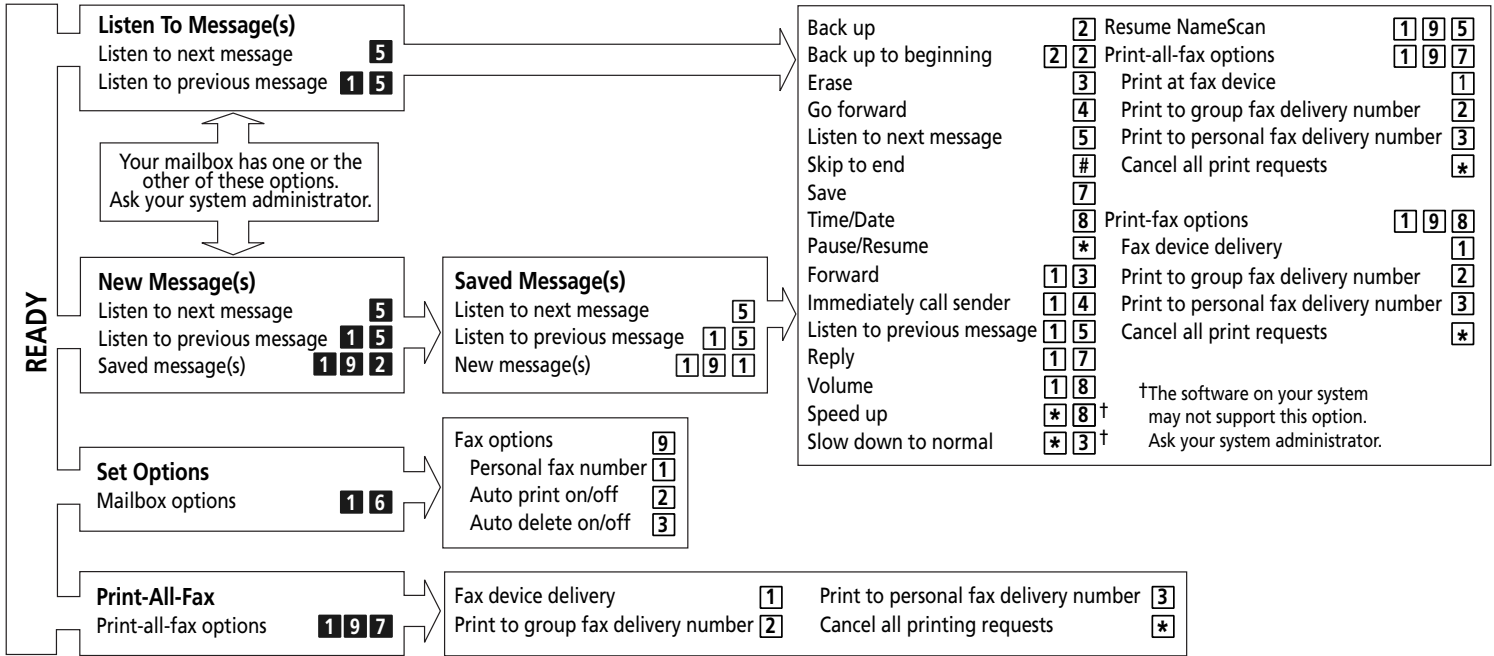
## SENDING AND RECEIVING FAX MESSAGES

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*In this chapter:*

- Receiving fax messages when you are at your desk
- Selecting fax options
- Reviewing and printing fax messages
- Sending a quick fax
- Telling callers how to send a fax to you

# SENDING AND RECEIVING FAX MESSAGES



## RECEIVING FAX MESSAGES WHEN YOU ARE AT YOUR DESK

---

If you pick up your phone and hear a fax tone, it is necessary to forward the incoming fax into your voice mailbox. Quickly do the following:

- ▶ Immediately transfer the call to your voice mail system number
- ▶ When the system answers press \* \* and enter your extension
- ▶ Complete the transfer process and hang up

### ◇Setting up a personal fax number

You may print faxes at any fax device.

To set up or change your personal fax number:

- ▶ Select Mailbox Options **1 6**
- ▶ Select Fax Options **9**
- ▶ Select Personal Fax Number **1**

If a personal fax number is currently defined the Octel system states the number. Press **\*** to erase or **#** to retain the current number.

- ▶ Enter the fax phone number  
Be sure to precede the fax number with any digits that are required to dial an outside number from your telephone system. If the system must pause during dialing, include a star (\*)—for example, **9\*** plus the telephone number. Check with your system administrator if you are not sure what digits are required.

**NOTE:** *Your system administrator can also set up a group fax number for your group or department. See “Printing all undelivered fax messages,” page 33, for printing to your personal or group fax number.*

---

### ◇Specifying automatic printing of all faxes

The Octel system ordinarily stores all faxes until you give the order to print them, but you can choose to have the system print each fax message as soon as it is received. Faxes print at your personal fax number, or, if you have not set up a personal fax number, to the group fax number that the system administrator has defined.

To turn automatic printing on or off:

- ▶ Select Mailbox Options **1 6**
- ▶ Select Fax Options **9**
- ▶ Select Auto Print **2**

---

## ◇Specifying automatic printing of all faxes (continued)

When the system auto prints a fax, the fax message remains in your mailbox unless you specify automatic deletion of faxes after delivery (*see next section*) or until you delete it.

## ◇Specifying automatic deletion of faxes after delivery

You can set up your mailbox to delete a fax message and any annotation automatically (*see “Sending a quick fax with an annotation,” page 34*), after the fax has been delivered successfully to your personal or group fax number. A fax message is not automatically deleted if it is delivered to the fax phone from which you accessed your mailbox.

To turn automatic deletion on or off:

- ▶ Select Mailbox Options **1 6**
- ▶ Select Fax Options **9**
- ▶ Select Auto Delete **3**

### ◇Hearing about fax messages

When you enter your mailbox, the Octel system notifies you if fax messages are in your mailbox. For example, you might hear the prompt, “You have x faxes, y new and z saved messages.”

To hear about fax messages sent to your mailbox:

- ▶ Indicate you want to “listen” **5**

When you “listen” to a fax message, the system plays the annotation, if any, the number of pages and, if used, the ID number of the sending fax device.

### ◇Printing fax messages individually

The Octel system can print individual fax messages or all unprinted fax messages. Specify the destination: the fax device from which you are calling, your group fax number or your personal fax number. After you print a fax it remains in your mailbox,

even if your mailbox is set up to delete voice messages automatically after you hear them. The next time you access this fax message, the system tells you whether or not it was successfully delivered.

To print individual faxes:

- ▶ Select Listen **5**
- ▶ Select Print-Fax Options **1 9 8**
- ▶ Indicate where you want to print:
  - Fax phone from which you are calling **1**
  - Group fax number **2**
  - Personal fax number **3**
  - Cancel and return to Ready **#**

To cancel the fax delivery:

- ▶ Select Listen **5**
- ▶ Select Print-Fax Options **1 9 8**
- ▶ Cancel the print request **\***

## ◇ Printing all undelivered fax messages

To print all faxes that have not already been successfully printed, specify the destination: the fax device from which you are calling, your group fax number or your personal fax number. After you print your faxes they remain in your mailbox, even if your mailbox is set up to delete voice messages automatically after you hear them. The next time you access them, the system tells you whether or not they were successfully delivered.

- ▶ Select Print-All-Fax Options **1 9 7**
- ▶ Indicate where you want to print
  - Fax device from which you are calling **1**
  - Group fax number **2**
  - Personal fax number **3**
  - Cancel and return to Ready **#**

To cancel the fax delivery:

- ▶ Select Print-All-Fax Options **1 9 7**
- ▶ Cancel all print requests **\***

**NOTE:** *If the initial delivery attempt fails, the system tries again based on how your mailbox is set up by your system administrator. If you determine that your chosen fax device is not working, use the **1 9 7 \*** command to cancel further attempts.*

### Sending a quick fax with an annotation

You can send a fax to a voice and fax mailbox and record a voice message (or annotation) to precede the fax.

To send a quick fax with an annotation:

- ▶ Lift the handset of the fax machine
- ▶ Call the Octel system
- ▶ Indicate you want to send a fax \* \*
- ▶ Enter the recipient's mailbox number
- ▶ Indicate you want to record an annotation \*
- ▶ Record the annotation
- ▶ Place the document in the feeder tray
- ▶ Start the fax transmission
- ▶ Hang up to disconnect

### Sending a quick fax without an annotation

There are two ways to send a quick fax without an annotation:

- ▶ Call the Octel system from the fax device
- ▶ Indicate you want to send a fax \* \*
- ▶ Enter the recipient's mailbox number
- ▶ Place the document in the feeder tray (optional depending on your device)
- ▶ Start the fax transmission
- or
- ▶ Dial the recipient's direct dial number from the fax device
- ▶ Start the fax transmission when you hear the recipient's greeting

## Sending a networked quick fax

---

- ◇ With networking, you can send a quick fax to a user on a remote Serenade system.

To send a quick fax to a user on a networked system:

- ▶ Call your Octel system
- ▶ Dial the network access number of the remote system from a fax device (ask your system administrator) and wait while you are transferred to the remote system
- ▶ Indicate you want to record and send a fax
- ▶ Enter the remote recipient's mailbox number
- ▶ Indicate you want to record an annotation (if desired)
- ▶ Record your voice annotation
- ▶ Send the fax
- ▶ Hang up to disconnect

Callers can send a fax to your voice and fax mailbox. They also may record a voice message, or annotation, to precede the fax.

Your system may have either the Octel Serenade or the Octel Common Caller Interface (OCCI). Ask your system administrator which set of instructions to explain to your callers.

### If your system has the Octel Serenade caller interface

Callers can use one of three methods to send a fax to you. (See “Sending fax messages,” page 59.)

### If your system has the Octel Common Caller Interface

Callers should:

- ▶ Lift the handset of the fax machine
- ▶ Call or be forwarded to the recipient’s mailbox
  - To record an annotation, they must call from a fax phone and lift the handset
- ▶ During the greeting, press **4** for fax options
- ▶ Listen to the spoken prompts and follow directions

---

**NOTE:** *If callers do not need to record annotations to their faxes, they can insert the document into the feeder of the fax device. When they reach your greeting your mailbox identifies the fax tone and immediately begins accepting the fax. No further action from the caller is required.*

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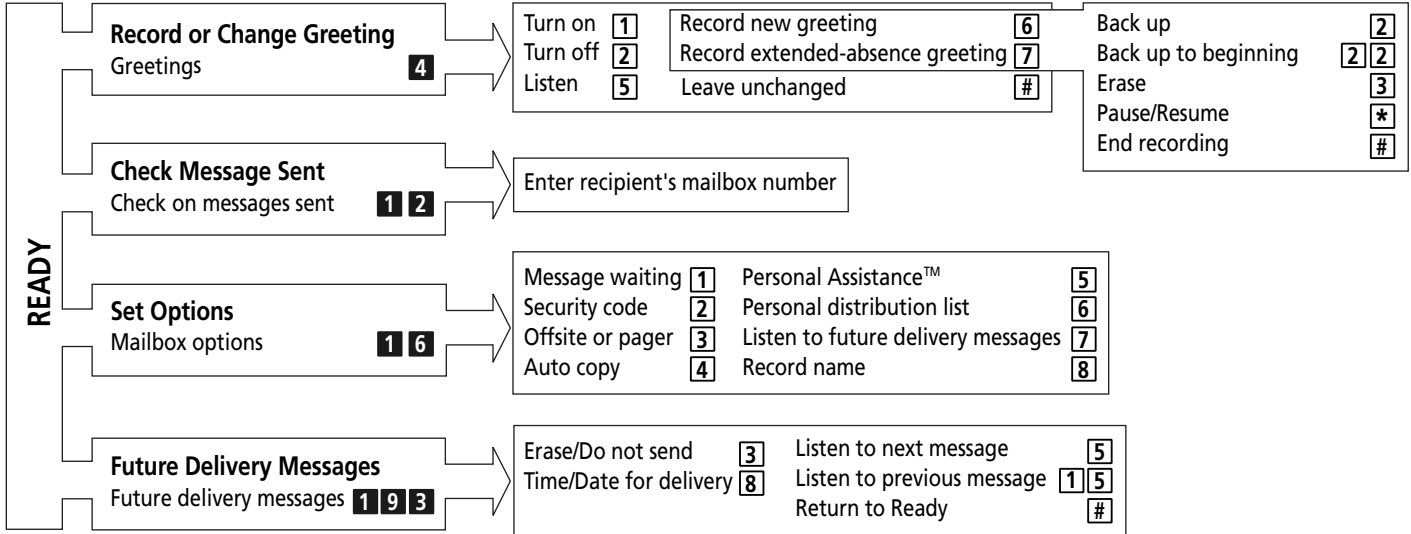
# CHAPTER 5

## MANAGING YOUR MAILBOX

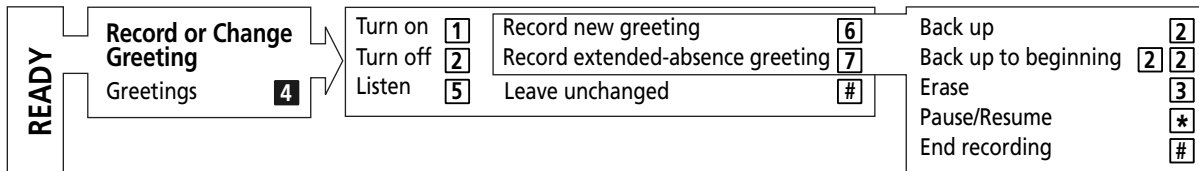
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*In this chapter:*

- Recording greetings
- Selecting the greeting to use
- Rerecording your name
- Changing your security code
- Checking the status of messages sent
- Copying your messages to another mailbox
- Requesting message notification
- Forwarding calls to a personal assistant
- Managing personal distribution lists



## RECORDING GREETINGS



Your personal greeting plays when you are unable to answer calls. The greeting should include your name, department and date; inform callers when they can expect a response; and suggest an alternate contact for immediate assistance. For example:

“Hello, this is Lynn Miller of Marketing on Friday the 14th of July. I am at an offsite meeting all day today, but I will be checking for messages on a regular basis. Please leave a message including your name, number and reason for calling and I will return your call either at lunch time or at 5 p.m. when the meeting ends. Alternatively, if your requirement is urgent, please dial 5555 now and speak with Steve Johnson, or press zero for assistance. Thank you.”

Update your personal greeting regularly so that callers know when to expect a response. Most companies suggest daily updates.

You can rerecord your personal greeting and turn it on or off at any time.  
*(See “Turning a personal greeting on or off,” page 43.)*

## Recording or changing your personal greeting

- ▶ Select Greetings **4**
- ▶ Select Record New Greeting **6**
- ▶ Record the greeting
  - Before ending recording you can:
    - Review last several seconds **2**
    - Back up to beginning **2** **2**
    - Erase entire greeting **3**
    - Pause or resume recording **\***
- ▶ When finished recording **#**

Your personal greeting is now on.

### ◊Recording a quick greeting without entering your mailbox

- ▶ Call the Octel system from your extension
- ▶ Select Change Greeting Menu **0**
- ▶ Indicate you want to record a new greeting **6**
- ▶ Record the greeting
- ▶ When finished recording **#**
- ▶ Hang up or press **#** to enter your mailbox

**NOTE:** You may only be able to use this feature at certain times of the day. When this feature is enabled anyone can change your greeting from your extension at those times of day.

## Listening to your greeting

- ▶ Select Greetings **4**
- ▶ Select Listen **5**

### ◊Recording an extended-absence greeting

Record an extended-absence greeting for your callers if you are going to be away from your phone for an extended period of time and will not be listening to messages. The extended-absence greeting should indicate when you will return to the office and suggest another person to call in your absence. This greeting overrides your personal greeting until you delete your extended-absence greeting. Once your extended-absence greeting is deleted, your personal greeting returns to its previous on or off state.

---

To record an extended-absence greeting:

- ▶ Select Greetings **4**
- ▶ Select Record Extended  
Absence Greeting **7**
- ▶ Record the greeting
  - Before ending recording, you can:
    - Review last several seconds **2**
    - Back up to beginning **2** **2**
    - Erase entire greeting **3**
    - Pause or resume recording **\***
- ▶ End recording **#**

Your extended-absence greeting is now on.

While your extended-absence greeting is present, your mailbox will not accept messages from outside callers. When you are finished recording your extended-absence greeting, the system prompts that your mailbox will not accept messages from callers. Depending on how your mailbox is set up, it may also prompt that messages from other mailbox holders will not be accepted.

When a message is sent to a mailbox with an extended-absence greeting and that mailbox will accept messages, the sender hears the name and the extended-absence greeting. The sender is prompted to enter another address. If the mailbox will not accept messages, the sender hears the name, the extended-absence greeting, and is informed that the mailbox cannot accept messages. The sender is prompted to enter another address.

Messages sent through a system or personal distribution list or to a network address are also affected by the presence of an extended-absence greeting. If a mailbox with an extended-absence greeting can accept a message from another mailbox holder, when the message is accepted, a return notification is generated to notify the sender of the extended-absence greeting. If the mailbox with an extended-absence greeting cannot accept messages,

---

the return notification is generated to notify the sender of the extended-absence greeting and that the message was not accepted. In both cases, the original message is returned so that it can be redirected if necessary.

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**NOTE:** *The extended-absence notification is supported by certain network configurations. Ask your system administrator if your network supports the extended-absence notification.*

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## SELECTING THE GREETING TO USE

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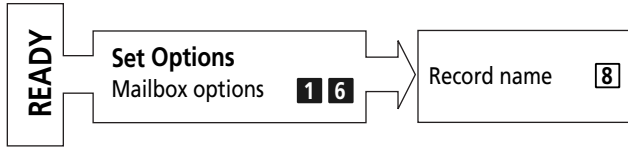
### Deciding whether to use a personal greeting

A personal greeting is preferred because it gives callers the assurance that you are checking your voice mailbox and sets their expectations for when you will return their calls.

What your caller hears depends on how your mailbox is set up and whether or not your greeting is on or off.

### Turning a personal greeting on or off

- ▶ Select Greetings **4**
- ▶ Turn greeting on **1**
- or
- ▶ Turn greeting off **2**

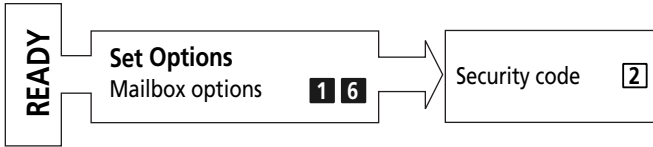


If your greeting is not on, or when a user addresses a message to you, the system plays your name so that callers can confirm they entered the correct mailbox number. You may have recorded your name the first time you used the system.

To record or rerecord your name:

- ▶ Select Mailbox Options **1 6**
- ▶ Select Record Name **8**
- ▶ Record your name
- ▶ When finished recording **#**

## CHANGING YOUR SECURITY CODE



Protect the privacy of information in your mailbox by frequently changing your personal security code. It is best to choose a security code that is easy to remember but difficult to guess.

To change your security code:

- ▶ Select Mailbox Options **1 6**
- ▶ Select Security Code **2**
- ▶ Enter the new security code
- ▶ When finished entering **#**
- ▶ Confirm by re-entering your security code
- ▶ When finished **#**

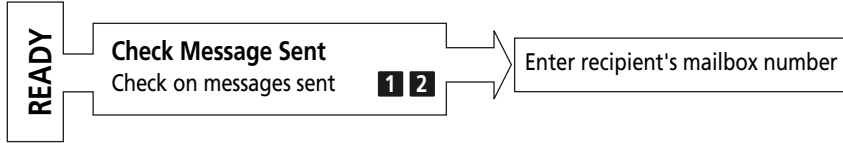
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**NOTE:** Your system administrator may specify a minimum-length requirement for your security code. The maximum length is 10 digits.

---

**NOTE:** The new security code cannot be the same as your current or previous security code or be your mailbox number.

---



The Octel system informs you whether designated recipients have listened to messages you sent to them.

To check the status of messages sent to a mailbox:

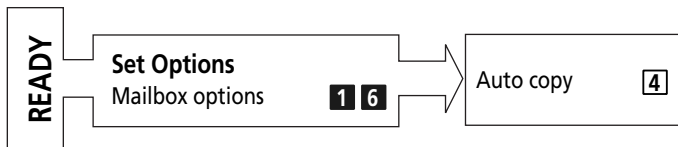
- ▶ Select Check Message Sent 1 2
- ▶ Enter designated recipient's mailbox number

---

**NOTE:** *The Octel system cannot check the status of messages that were sent to extended mailboxes, which are multiple mailboxes that belong to one person. The prompt that plays if you try to use message check on an extended mailbox is, "Sorry, that mailbox does not exist."*

---

## COPYING YOUR MESSAGES TO ANOTHER MAILBOX



**NOTE:** *The system may automatically delete messages from your mailbox once it copies them to another person's mailbox. In this case the auto-copy feature becomes an auto-forward feature in functionality.*

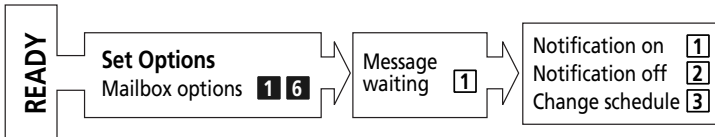
- ◇ You may automatically copy messages received by your mailbox to another person's mailbox or network address—for example, when you are sharing a job, collaborating closely on a project or out of the office for an extended period. Messages are copied to the selected mailbox until you change or delete the auto-copy mailbox number.

To automatically copy your messages to another mailbox:

- ▶ Select Mailbox Options **1 6**
- ▶ Select Auto Copy **4**
- ▶ Enter the mailbox number

- ◇ The Octel system provides three types of notification when messages are in your mailbox:
  - **Message-waiting indicator.** A light on your telephone, stutter dial tone or call-reminder display signals the arrival of new messages. Your system administrator controls this feature. It is in effect 24 hours a day.
  - **Message-waiting notification.** The system calls you at a designated telephone number to inform you that messages are in your mailbox.
- ◇ • **Offsite or pager notification.** The system calls you at a designated offsite telephone number or pager to inform you that new messages are in your mailbox.

### Setting up message-waiting notification



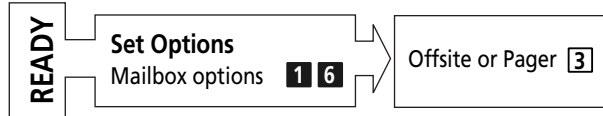
To turn message-waiting notification on or off and set up a notification schedule:

- ▶ Select Mailbox Options **1 6**
- ▶ Select Message Waiting **1**

The system informs you whether Message Waiting is currently on and, if so, the active period and frequency of notification. You may then:

- ▶ Turn notification on **1**  
or
- ▶ Turn notification off **2**  
or
- ▶ Change the notification schedule **3**  
Enter the hour to begin: **1** to **1 2**  
followed by **\*** for a.m. or **#** for p.m.  
Enter the hour to end: **1** to **1 2**  
followed by **\*** for a.m. or **#** for p.m.  
Enter the interval, in minutes, between each notification: **1 0** to **6 0**

## ◇ Providing the offsite telephone or pager number for notification



Ask your system manager whether your system notifies you of all new messages or only those marked urgent.

If there is an existing offsite or pager number the system states it and gives you the opportunity to delete it or enter a new number.

- ▶ Select Mailbox Options **1 6**
- ▶ Select Offsite or Pager Notification **3**
- ▶ Listen to existing number
- ▶ Delete existing number **\***
- or
- ▶ Enter new number
- ▶ When finished **#**

If no offsite or pager number exists, you can establish one:

- ▶ Select Mailbox Options **1 6**
- ▶ Select Offsite or Pager Notification **3**
- ▶ Enter number
- ▶ When finished entering **#**
- or
- ▶ For no change **#**

---

### **TIP: Specifying the appropriate preceding digits**

*You should check with your system administrator to find out what digits, if any, are required to precede the offsite number, e.g. "9" for an outside line may or may not be required.*

---



If you do not answer your phone the Octel system can transfer your calls to a personal assistant whom you designate. Depending on how the system administrator sets up your mailbox, callers are automatically transferred to a personal assistant or can reach the personal assistant by pressing **0** when the system prompts for leaving a message.

When the personal assistant answers the phone, he or she hears the following message:

“Connecting forwarded call. <Your name> is unavailable <or doesn’t answer or is busy>...”

If the personal assistant is on the phone or does not answer, your caller hears a message that Personal Assistance is unavailable

and has the option to leave a message in your mailbox, dial another extension or dial **0** for the operator.

---

**NOTE:** *Be sure to provide your personal assistant with the information needed to assist your callers.*

---

Ask your system administrator when Personal Assistance is turned off automatically—typically before or after normal business hours. You should turn off Personal Assistance during other periods when your assistant is unavailable.

### Turning Personal Assistance on

- ▶ Select Mailbox Options **1 6**
- ▶ Select Personal Assistance **5**

If a personal assistant is currently defined, the Octel system states the mailbox number

- ▶ Enter the mailbox number of your personal assistant

---

## Turning Personal Assistance off

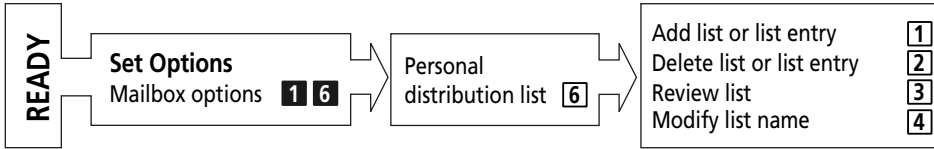
- ▶ Select Mailbox Options **1 6**
- ▶ Select Personal Assistance **5**
- ▶ Remove the Personal Assistance number **\***

---

### **TIP: When you are a personal assistant**

*Answer in such a way as to reassure callers that you are prepared to assist them. For example, you might answer the caller with, “This is Tim Jones’ assistant. He is out of the office for the afternoon. May I help you?”*

---



◇ If you send messages to the same group of people regularly, you may create up to nine personal distribution lists. You may assign up to a total of 400 mailbox numbers or network addresses to your personal distribution lists depending on the number your system administrator has specified. For example, you could have one list with 200 addresses, one with 150 addresses and one with 50 addresses. Distribution lists save time by enabling you to send messages to all members of the list at once.

### Creating a personal distribution list

- ▶ Select Mailbox Options **1 6**
- ▶ Select Personal Distribution List **6**
- ▶ Select Add List or Add a List Entry **1**
- ▶ Enter a two-digit number for the list (01–09)
- ▶ Record a name for the list
- ▶ When finished recording name **#**
- ▶ Enter all addresses to include in the list
- ▶ When finished entering all addresses **#**

### Reviewing a personal distribution list

- ▶ Select Mailbox Options **1 6**
- ▶ Select Personal Distribution List **6**
- ▶ Select Review List **3**

---

## Modifying the list name

You hear the list name for confirmation when you address a message to the list number.

To delete or change the name of a personal distribution list:

- ▶ Select Mailbox Options **1 6**
- ▶ Select Personal Distribution List **6**
- ▶ Select Change Name **4**
- ▶ Enter the two-digit list number
- ▶ Record a new name
- ▶ When finished recording **#**

## Deleting or modifying a list

To delete a mailbox number from the list or the entire list:

- ▶ Select Mailbox Options **1 6**
- ▶ Select Personal Distribution List **6**
- ▶ Select Delete List or Delete a List Entry **2**
- ▶ Enter the two-digit list number
- ▶ Enter a mailbox number to delete or
- ▶ Delete the entire list **\***



# CHAPTER 6

## EXPLAINING THE SYSTEM TO YOUR CALLERS

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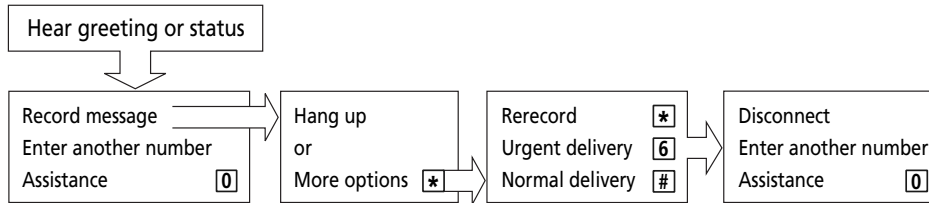
*In this chapter:*

- Leaving voice messages
- Sending fax messages

When callers dial your number, if you are on the phone or do not answer, the telephone system forwards them directly to your voice mailbox or asks them to dial your extension. Then they hear your personal greeting.

Your system may have either the Serenade or the Octel Common Caller Interface. Ask your system administrator which set of instructions to explain to your callers.

### If your system has the Serenade caller interface



### TIP: Skipping your greeting

Tell frequent callers they may skip your greeting by pressing the # key. On some systems they must press \* to skip the greeting.

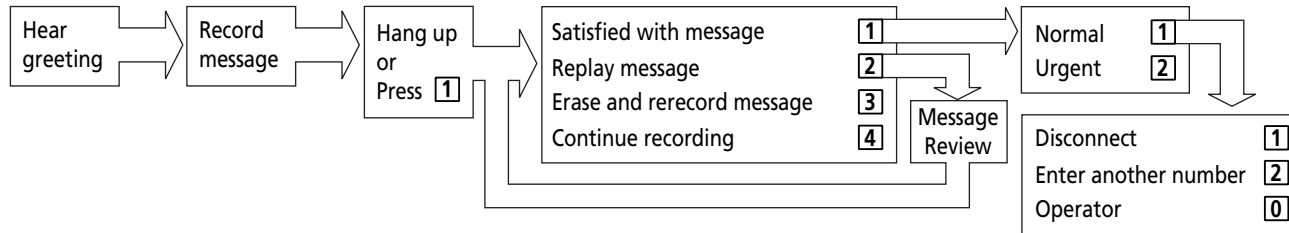
When callers have recorded a message, they may hang up or press \* for more options. If they press \*, the system gives them the following options:

- ▶ Rerecord the message \*
- ◊ ▶ Send it with urgent delivery 6
- ▶ Send it with normal delivery #
- or
- ▶ Hang up

Callers who do not hang up after the message is sent can enter another extension number or press **0** for assistance.

*NOTE: If you are frequently away from your phone but need to be notified about messages left via call answering, your mailbox can call or page you when such messages arrive. Your system administrator can set up your mailbox to notify you when callers leave you messages and to mark these messages as urgent automatically.*

### If your system has the Octel Common Caller Interface



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**TIP: Skipping your greeting**

*Tell frequent callers they may skip your greeting by pressing the **#** key.*

---

When callers have recorded a message, they may hang up or press **1** for more options. If the caller presses **1**, the system provides the following options:

- ▶ If satisfied with the message **1**
- ▶ To listen to the message **2**
- ▶ To erase and rerecord **3**

Callers can continue recording after listening to the message by pressing **4**.

When the caller presses **1**, the system prompts for addressing options:

- ▶ Normal delivery **1**
- ▶ Urgent delivery **2**

When callers are finished, they can hang up, enter another number or press **0** for assistance.

## ◇ SENDING FAX MESSAGES

---

Callers can send a fax to your voice and fax mailbox. They also may record a voice message, or annotation, to precede the fax.

Your system may have either the Octel Serenade or the Octel Common Caller Interface. Ask your system administrator which set of instructions to explain to your callers.

### **If your system has the Serenade caller interface and the caller wants to use Quick Fax**

Give your Octel system telephone number and mailbox number to your callers.

Callers should:

- ▶ Lift the handset of the fax machine
- ▶ Call the Octel system
- ▶ Indicate they want to send a fax \* \*
- ▶ Enter your mailbox number
- ▶ Indicate they want to record a voice annotation (if desired) \*
- ▶ Record the annotation
- ▶ Place the document in the feeder tray

- ▶ Start the fax transmission
- ▶ Hang up to disconnect

### **If your system has the Serenade caller interface and your direct dial telephone number and fax number are different**

Give your fax number to your callers.

Callers should:

- ▶ Place the document in the feeder tray
- ▶ Call your fax number
- ▶ Start the fax transmission

Callers who wish to record an annotation should lift the handset of the fax machine, dial the fax number and follow the prompts. Then they should place the document in the feeder tray and start the transmission.

---

## If your system has the Serenade caller interface and your direct dial telephone number and fax number are the same

Give your telephone number to your callers.

Callers should:

- ▶ Place the document in the feeder tray
- ▶ Call your direct dial telephone number
- ▶ Start the fax transmission

Callers who wish to record an annotation should lift the handset of the fax machine and dial your phone number. When they hear your greeting, they should press **\* \***, enter your extension number and follow the prompts. Then they should place the document in the feeder tray and start the transmission.

## If your system has the Octel Common Caller Interface

Callers should:

- ▶ Lift the handset of the fax machine
- ▶ Call or be forwarded to your mailbox
  - To record an annotation they must call from a fax phone and lift the handset.
- ▶ During the greeting press **4** for fax options
- ▶ Listen to the spoken prompts and follow directions

---

*NOTE: If callers do not need to record annotations to their faxes, they can insert the document into the feeder of the fax device. When they reach your greeting your mailbox identifies the fax tone and immediately begins accepting the fax. No further action from the caller is required.*

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## GLOSSARY

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**Annotation.** The voice message that a caller can record and *attach* to a fax message.

**Assistance.** The extension to which callers are directed if they dial **[0]** or wait on the line to speak with someone.

**Caller interface.** The voice prompts your callers hear and the keys they press to take certain actions.

**Distribution list.** A group of mailboxes contained in a list with a common group number. When you address a message to the group number, all members on the list, except the sender, receive the message.

**Extended-absence greeting.** A greeting that tells your callers if you are going to be away from your phone for an extended period of time and will not be listening to messages.

**Extension number.** A number assigned to an individual telephone. A user's extension number may be the same as the user's mailbox number enabling the Octel system to perform various functions such as setting message-waiting indicators.

**Mailbox.** A portion of the Octel system where you can send and receive voice messages and, if you have the fax feature, fax messages.

**Message waiting notification.** Informs you that your mailbox received a new message since the last time you entered it. Two types of message-waiting notification are a stutter dial tone and a lamp on your phone.

**Networking.** The ability of the Octel system to make calls to, and exchange messages with, other messaging systems.

---

**Offsite or pager notification.** An option that allows you to set up your mailbox to call your home, car phone, pager or other telephone when your mailbox receives a new message.

**Personal Assistance.** An optional feature that allows you to designate an associate who is familiar with your work area to handle your calls when you are unable to answer your telephone. Depending on the way your system is set up, callers either transfer themselves to your personal assistant or the system transfers them when you do not answer.

**Personal greeting.** A message you record that plays when you are unable to answer calls.

**Security code.** A number you must use for entry into your mailbox; helps protect the privacy of the information in your mailbox.

**System administrator.** The person at your company responsible for the operation of the Octel system.

# INDEX

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