DRAFT

VoiceRite Client Guide
A reference guide for installing Marist’s new voice mail messaging client
Welcome to Marist College’s New Voicemail System

Unified Messaging (UM) is a powerful, yet easy-to-use messaging system. It integrates your new voicemail system with your email system. You can make better use of your own time and that of your co-workers by sending and receiving voice messages when a personal interruption is not necessary or you’re out of the office. You can record an up-to-date personal greeting that callers hear when you are unavailable or away from the office. UM then takes messages for you to deal with at a more convenient time. You can operate all the features of UM from any phone that generates tones and use the VoiceRite Client desktop application on your PC - at work, from home, or when you are traveling.

Contents of this Booklet

This booklet contains a Quick Start Guide to help you get started using all of the features of your voicemail system from set-up to a quick reference to get you going!

First Time Users, What do I need to get started?

You may connect to Unified Messaging in the following manner; each method has its own unique requirements:

The Telephone User Interface

- To call and sign in you will need the access number, sometimes referred to as the pilot number
- The Marist College access number is 575-4500, on campus, it is extension 4500
- Your voicemail box number, which is your extension
- Your New Password, this will be provided to you in a welcome email
- A telephone or computer

The first time you sign in to Unified Messaging using the Telephone, you will be required to set the following options:

- Record your Audio Name
- Record your Available and working at the Office Greeting

The VoiceRite Client

Using the VoiceRite Client at a minimum you will be required to:
- Set your Mailbox Name
- Record your Audio Name
- Record your Available and working at the office greeting

You will have an opportunity to configure other preferences using the VoiceRite Client Wizard.

Recording your Greeting

When recording your “Available and working at the Office Greeting” you will want to ensure that you include information that the “caller” may use to reach you at your alternative numbers. For example, any caller to your mailbox may press “0” during the playback of your greeting for other options such as using an assistant number or your “Reach Me” number. Here is an example to help you get started:

“Hello, this is (name) at (your company name). I am in the office today. You may leave me a message or press “0” for more contact options. Thank you.”
Installing the VoiceRite Client

Recording Your Audio Name

Your audio name is used by the Voicemail system to announce your name when you use the system greeting or when others receive messages from you. It is also used for other features as well.

Step 1: Go to the Marist web site, at the home page, select Faculty and Staff.

Step 2: Under Online Services, select VoiceRite Desktop Client.

Step 3: Enter your Marist account and User Password.

Step 4: Download the VoiceRite Client.

Step 5: Install the client.

Step 6: Accept the Terms in the license agreement and click Next, then click Finish in the last view.

Step 7: The publisher could not be verified. Are you sure you want to run this software? Select Run.
Installing the VoiceRite Client

Step 8: At the Installshield Wizard click **Next**.

**Note:** If you have **not accessed** your Voicemail box to reset your DEFAULT password then you must use the DEFAULT Password received in the welcome email from the Voice Mail System. You will be prompted to change your DEFAULT Password at this time.

Step 9: Enter your mailbox information:

**UM Mailbox Number:** This is your Extension Number.

**UM Password Number:** This is your NUMERIC Password used to access your Voicemail box (4 to 8 digits).

Click **Next**.

Step 10: Enter your name as you would like to see it used by the VoiceRite Client. Click **Next**.

**Note:** The Alternative Numbers view is configurable by the System Administrator. Some of the options may or may not be available.

Step 11: **Mobile Number:** When you enter your mobile number, this number will be automatically saved in your list of transfer numbers.

**Note:** The Alternative Numbers view is configurable by the System Administrator. Some of the options may or may not be available.

Step 12: If you are a first time user, this step is required. Record your Mailbox name. Use “Call Me” or the “Microphone” feature to record your name then click **Next**. The recording quality is better using the telephone handset.
Installing the VoiceRite Client

Step 13: Record your “Available and working at the office” greeting (if not recorded). If you do not record, the system greeting will play for callers reaching your mailbox. Click Next.

Note: Email Client options are configurable and may change.

Step 14: Select an Email Client. Client works with your favorite email client to offer you forwarding emails, contact list name resolution, and more. Click Finish to sign in!

VoiceRite Client Settings: Ensure that you pay close attention to the VoiceRite Client settings. Just click the preferences icon from the main view to open your settings or use the down arrow.

Alerts
Alerts may be audio or bring the VoiceRite Client to the desktop. This notification is activated based on incoming calls and or messages left in your mailbox.

Incoming Calls
Be sure to “Enable the Incoming Call dialog” in order to intercept calls arriving in your mailbox. To allow the “Incoming Calls” dialog to open on top of all applications when a call comes in, just check the checkbox.

Call History
Use the drop down list to select the week(s) that you wish to save incoming call detail.
Installing the VoiceRite Client

**Email Client**
Select an email client to enable the workflow icon. This allows you to forward messages as email; set up your contacts so the number resolves to an easily recognizable name; create tasks; and schedule reminders.

**Automatic Resolution**
Check the checkbox to enable auto resolution and select “search order”:

*Use Local Only* – this resolution bumps the incoming call phone number against your personal contact list for your email client. For example, we added our business associate above to our contact list with the name “Jeffrey Harbor cell phone”. Using local only, the call will display like this:

A simple rule of thumb is the “first time the call is resolved against a database, then that is what you will see in the display.

*Local Address Book*
When you select “local” resolution, the VoiceRite Client will check your Lotus Notes and/or Microsoft Outlook for name resolution unless your System Administrator has configured the available email client options differently.
VoiceRite Client at a Glance
This quick reference provides instructions for managing and accessing your voicemail using the VoiceRite Client plug-in. See Appendix 3 for managing the “Single Mailbox Solution”.

Connecting to the Server
The Client is connected to the Unified Messaging Server if you see the online indicator at the bottom right of the view. You may also view how many new messages are in your inbox “2” and the capacity of your mailbox “20”. The number of mailbox messages allowed is set by the System Administrator and may differ from the example.

Listening to Voicemail
Make sure your computer’s audio and speakers work. Double click on the message you want to hear. The media player progress bar tracks the play of your message.

Incoming Call Dialog Box
A dialog box will pop-up when a caller reaches your voice mailbox. Now you have the opportunity to intercept the call or you may opt to have the call answered by Unified Messaging by simply closing the dialog.

"Your call has been intercepted … you are currently on hold, press any key to exit". To take the caller off hold, you may either let the time expire (set to 30 seconds at installation) or take an action such as transferring them to voicemail.

While a call is being transferred, the buttons will not be available unless the System Administrator has enabled the feature that allows you to intercept during and/or after transfers.

"Tip: watch the activity messaging at the bottom of the dialog to view the current status of a call.

Forwarding Messages
Select the message you wish to forward and right click for a menu. Select Forward as Voice Message to open your dialog. Enter a number and optionally record an introduction message.

"Tip: you will not be allowed to forward a message that has been marked “Private” by the sender.

Replying to a Message
Reply works much like forwarding with one caveat – you may only reply to messages received from other Unified Messaging subscribers. If you try to reply to others still on the Rolm system you will not be able to do so. If you set your preferences to receive your voice messages in email you can forward the voice message via email.

Incoming Calls - <#> of calls
From the main view, incoming calls shows you all calls received in your mailbox regardless of whether the caller leaves a message or not per login session. When you close the VoiceRite Client all calls are cleared. You may optionally save call history. Visit the VoiceRite Client settings to set this feature.

Use the right-click menu to chat or add an incoming caller to your contact list; view and/or manage your call history; and clear call detail. Remember to select the call in “Incoming Calls” prior to using the right click menu.

Workflow Icons
To enable the workflow icons, select a message in your VoiceRite Client inbox.

Email Options
Clicking the email icon opens a menu. You may add a contact, create an email, add a task, or schedule a meeting. For example if you are using Lotus Notes as your email client and select create email, Lotus
Notes will open to the "New Memo" view and attach the voice message as a WAV file unless the caller marked the message as "private".

**Voice Message Options**
Clicking the voice message icon opens a menu. These options allow you to work with your messages. For example, you may delete, save, reply, forward, and more. To delete or save multiple messages, hold down the Ctrl key to mark the messages then use the delete or save to complete.

**Phone Options**
Clicking the voice message icon opens a menu. These options allow you to work with features that utilize your phone such as placing a callback, sending a message to your cell phone or desk phone (when you need a little privacy), or sending a short text message.

**Preferences**
When you click the preferences workflow icon VoiceRite Client settings view opens in the right-hand pane.

»Tip: click the Preferences icon down arrow to navigate to any Preference view.

**Working with Preferences**, you will be able to:
- Record your Greetings and set up important numbers so callers may reach you.
- Set schedules to automatically play greetings.
- Create distribution lists to send messages to multiple recipients.
- Set options for the telephone interface.
- Set personal options like change your password and record your audio name.
- Create notification schedules and have Unified Messaging alert you when calls are received.
- Set up transfer numbers and custom messages to play for callers reaching your mailbox.

**Greetings/Call Handling Preferences**
The Client lets you choose from 5 different states of availability with 5 different call handling sets and distinct greeting. Your mailbox configuration will be set by the System Administrator. For example:

<table>
<thead>
<tr>
<th>Available and Working at the Office</th>
<th>Available, but working away from the office</th>
<th>Unavailable, but accepting messages</th>
<th>Unavailable not accepting messages</th>
<th>Left for the day</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Caller Choices**
During the playback of your greeting, callers may press 0 for a Menu and select from the following:

**Note:** Caller options are configurable by the System Administrator and may or may not be available for your mailbox.

**How to “Reach Me”**
You can give callers the option to try and reach you if you are not in the office. Pressing 0 and then 3 while listening to your greeting instructs Unified Messaging to try the Reach Me number set in Greetings and Call Handling or Callflow Scheduler.

**Setting up Auto Call Forwarding**
When you want your calls diverted to another telephone number instead of playing a greeting to the caller - setup automatic call forwarding. If call forwarding is set, when the caller reaches your mailbox, they will hear something like this: “Please hold for a few moments while we connect you.” Unified Messaging returns the caller to your mailbox greeting when the number is busy or there is no reply and you cannot be reached.

**Log Off/In VoiceRite Client**
If you wish to log off the VoiceRite Client and not exit Sametime, click File->VoiceRite Client->Log Off. You may log back in at any time.
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**VoiceRite Client**

**How do I reconnect the Client if it goes off line for some reason?**

There is no way for the user to reconnect; the Client will automatically reconnect when the network becomes available.

**Can I intercept a call during transfers?**

Yes, click the hold button during the transfer to take the call back. Then you may send the caller to voicemail or play a system or custom message.

**Note:** This feature is configurable by the System Administrator and may or may not be available.

**My Voicemail message volume is too low on my PC, how do I adjust it?**

- Open your PC Control panel
- Open sounds and Audio devices
- Click on the ADVANCED volume button
- Raise the Wave volume bar to the desired setting

**I changed my Call Handling Preferences, why didn't they stick?**

When you change any of your preferences be sure to click the OK button. If you close your Preferences using the red X in the corner, your changes will be discarded.

**How do I view my mailbox information, preferences?**

Click the Preferences icon from the main view and expand VoiceRite Desktop Client in the left side navigation bar. You may then navigate to any of the Preferences views to work with your greetings, custom messages, and more. Alternatively, just click the down arrow of the Preferences icon and select Preferences and then navigate to your choice of the preferences views.

**Received an error message to set my PATH, how do I do this?**

1. Locate the “My Computer” icon on your desktop and right click for a menu. Select properties. Select the Advanced tab. Click the button for environmental variables. In the System Variables locate the Variable PATH. Select PATH and click the edit button. At the end of the path string enter the following path:

   `C:\Program Files\IBM\Lotus\Notes` 

   **Note:** paths are separated by a semicolon. Make sure that the semicolon is present or add it following the last entry before entering your new path.

**I can't find an icon called My Computer on the desktop…**

If you do not see a desktop icon for My Computer, then click the Start button and locate “My Computer” on the menu. Highlight My Computer and right click for a menu, select properties.

**VoiceRite Client**

**How do I change my mailbox if I need to?**

Click the Preferences icon to view the VoiceRite Client Settings. Click the Reconfigure button at the bottom of the view. Click “Yes” when you are asked if you wish to continue. The VoiceRite Client will restart and the Wizard will lead you through configuring your new mailbox.

**What is Reach Me?**

A reach me number allows callers that reach your mailbox greeting to press a key on the keypad for more options and then press a key to try and reach you on another number. The caller is returned to your greeting if the number is busy or there is no reply. You may visit the Callflow scheduler to configure your Reach Me number or Greetings and Call Handling.

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You may send the caller back to voicemail; transfer the caller to another number; or play a message for the caller. For example, you could send the caller back to voicemail by selecting “Voicemail” from the “Transfer Call” list as seen below:

This will immediately take the caller off hold and send the caller back to listen to your greeting.

<table>
<thead>
<tr>
<th>What is an email client?</th>
<th>Simply defined the email client is a software program used to manage your email. In the context of the VoiceRite Client Lotus Notes and Microsoft Outlook are supported.</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is a First Time User?</td>
<td>In Unified Messaging, a first time user is considered anyone with a mailbox that is being installed for the first time. There are mandatory requirements that the first time user must complete including recording a mailbox name and greeting. If you are not a first time user and have completed these requirements, you will be able to skip these steps.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>VoiceRite Client</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I set the time a caller is on hold?</td>
</tr>
</tbody>
</table>

If you select “never”, then the VoiceRite Client will not take any action to automatically take the caller off hold.