

UC for Business

Executive Desktop/Executive Insight User Mailbox Setup



Revision History

Document No.	Release Date	Change Description
014NEC-00QRGR	04/13/11	Initial release.

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Introduction

The first time starting either Executive Desktop or Executive Insight, the following wizards automatically run to assist in the personalized voice messaging environment setup:

- Desktop Setup wizard
- First Time Setup wizard

This guide provides step-by-step instructions on how to set up a user mailbox using either Executive Desktop or Executive Insight.

Log Into and Out of Desktop

Log into Desktop

1. On the PC's Desktop, double-click the **Desktop** shortcut icon.



2. In the **Login Name** field, type your full name (your name may automatically display after typing a few letters).
3. In the **PIN** field, type the PIN number (initially the PIN is 2222 until you change it to a unique number).
4. Optional: Click the **Remember Me Next Time** option to save this login information for the next time you start Desktop.

Log Out of Desktop

1. Log out of the queues (if necessary).
2. Use any of the following methods to log out of Desktop:
 - Click the **Close** button (the red **X** in the upper right-side of Desktop).
 - From the **File** menu, select **Exit**.
 - Press **Alt + F4**.

Change the PIN



Note: The first time starting Desktop, the Desktop Setup wizard automatically runs and prompts to change the default PIN. Refer to the *User System Setup Quick Reference Guide* for details.

1. From the **File** menu, select **Change PIN**.

The screenshot shows a dialog box titled "Change PIN". It has a blue title bar with a small "D" icon and a close button. The dialog contains three input fields, each with a masked field (*****): "Old PIN:", "New PIN:", and "Verify New PIN:". At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

2. In the **Old PIN** field, type the old PIN (the default PIN is **2222** until a new PIN is created).
3. In the **New PIN** field, type the new PIN.
4. In the **Verify New PIN** field, again type the new PIN.



Note: Remember to enter the new PIN the next time you open Desktop.

Start Executive Insight



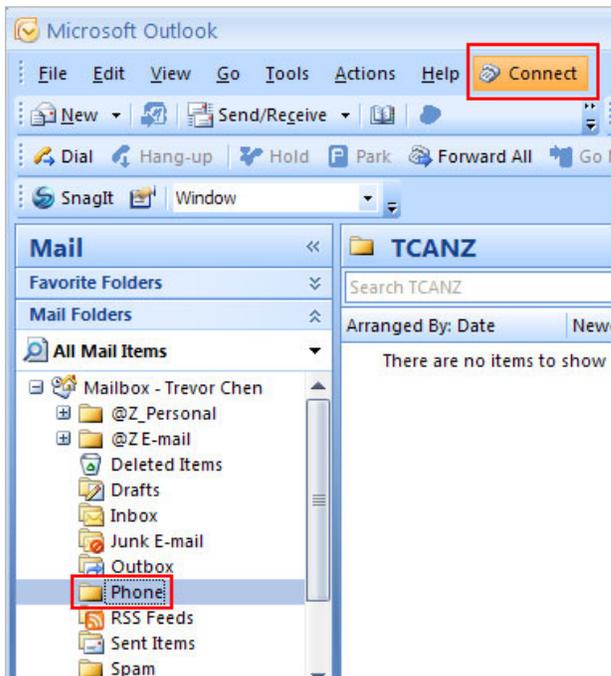
Note: Executive Insight does not automatically start when opening Outlook.

1. In Outlook, click the **Connect** icon.
2. The first time starting Executive Insight, you may be prompted to complete some initial setup using the Setup Wizard.
3. Optional: Set up Executive Insight to automatically start when Outlook is opened.
 - a. From the **Tools** menu, select **Phone**.



Note: For 2010 users: From the **File** menu, select **CTI Add-in**.

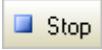
- b. Click the **Load on Start** option.
4. Executive Insight creates a folder in the Outlook mail folders named **Phone**. To return to the Executive Insight view at any time, open the **Phone** folder (or click your extension icon).



Set Up the User Environment

Several audio recordings need to be recorded when using the setup wizards. A standard common recording interface is used in all instances.

The Record Toolbar

Item	Description
	Import a sound file for a Desktop greeting or name. Also, a sound file that was created in Desktop can be exported. Note: Only .wav or .vox formats can be used.
	Edit any part of the recording by clicking and dragging the recording to a portion of the sound file. The selection is shaded black in the display.
	Select/toggle to the preferred record/playback medium. <ul style="list-style-type: none"> • Sound Card. You must have a microphone connected to the PC to record your voice, and speakers or a headset for playback. • Phone. Your desk phone is used for recording and playback.
	Listen to a recording.
	Record the audio.
	Stop the recording or playback.

Make an Audio Recording

The following procedures describes a typical basic recording procedure using the phone.

1. Click the **Phone** icon to use the desk phone.
2. Pick up the phone handset, and then click the **Record** button.
3. Speak clearly while making the recording.
4. When finished speaking, click the **Stop** button. A waveform of the recording displays.
5. Click the **Play** button to listen to the recording. If not satisfied, repeat steps 1-4 to make a new recording.
6. Optional: Use the **Edit** menu options to edit the recording.

First-Time Setup Wizards

Desktop Setup Wizard

The first time logging into Desktop, the Desktop Setup Wizard automatically runs. A prompt asks to change the PIN and configure some basic voice messaging settings.



Important! Do *not* skip this wizard.

1. When the Welcome window displays, click **Next**.
2. In the **New PIN** and **Verify PIN** fields, type the new four-digit PIN and then click **Next**.
3. In the Desktop Preferences window, click the required options and then click **Next**.
4. Click the **Automatic Presence Detection** option, set the inactivity duration, and then click **Next**.



Note: This setting is essential to gain maximum advantage from the Presence functionality.

5. Click the options of the required reasons to bring Desktop to the forefront, and then click **Next**.
6. Record the mailbox name for voice messaging using the standard recording procedure, and then click **Next**.



Note: The suggested mailbox name is indicated in the yellow information window.

7. Select when the date/time is to play when listening to voice messages, and then click **Next**.
8. Click the option to record the various Presence profile greetings.
9. Record the Presence profile greetings using the standard recording procedure, and then click **Next**. Record a greeting for each of the profiles that have been set up for the department.



Note: Profile greetings are customized messages informing the caller of your whereabouts or what you are doing at any given time. Typical examples display in the yellow information window within each profile window.

10. Verify the settings, and then click **Finish**.

Executive Insight Setup Wizard

The first time starting Executive Insight, the First Time Setup Wizard automatically runs. A prompt asks to select the prime line, change the PIN, and configure some basic voice messaging settings.



Important! Do *not* skip this wizard.

1. Enter the login information, and then click **OK**.
 - a. In the **Login Name** field, type the login name.
 - b. In the **PIN** field, type the default PIN (initially, this is **2222**).
2. When the Welcome window displays, click **Next**.
3. From the list, select the primary telephone extension and then click **Next**.
4. In the **New PIN** and **Verify PIN** fields, type the new four-digit PIN and then click **Next**.
5. Record the mailbox name for voice messaging using the standard recording procedure, and then click **Next**.



Note: The suggested mailbox name is indicated in the yellow information window.

6. Select when the date/time is to play when listening to voice messages, and then click **Next**.
7. Click the option to record the various Presence profile greetings.

- Record the Presence profile greetings using the standard recording procedure, and then click **Next**. Record a greeting for each of the profiles that have been set up for the department.



Note: Profile greetings are customized messages informing the caller of your whereabouts or what you are doing at any given time. Typical examples display in the yellow information window within each profile window.

- Verify the settings, and then click **Finish**.

Mailbox Setup

The personalized mailbox settings may need to be periodically updated. This section describes how to set up the mailbox for both Desktop and Executive Insight.



Note: The personalized mailbox settings are initially created via the Setup wizard.

Access the Mailbox Setup

- Click the **Mailbox Setup** icon. A number of tabbed windows are used to functionally group the mailbox settings. Refer to the online help for more specific information on individual settings.



Note: Some of the tabs/options discussed in the following section may not be visible if the associated modules/licenses are not installed.

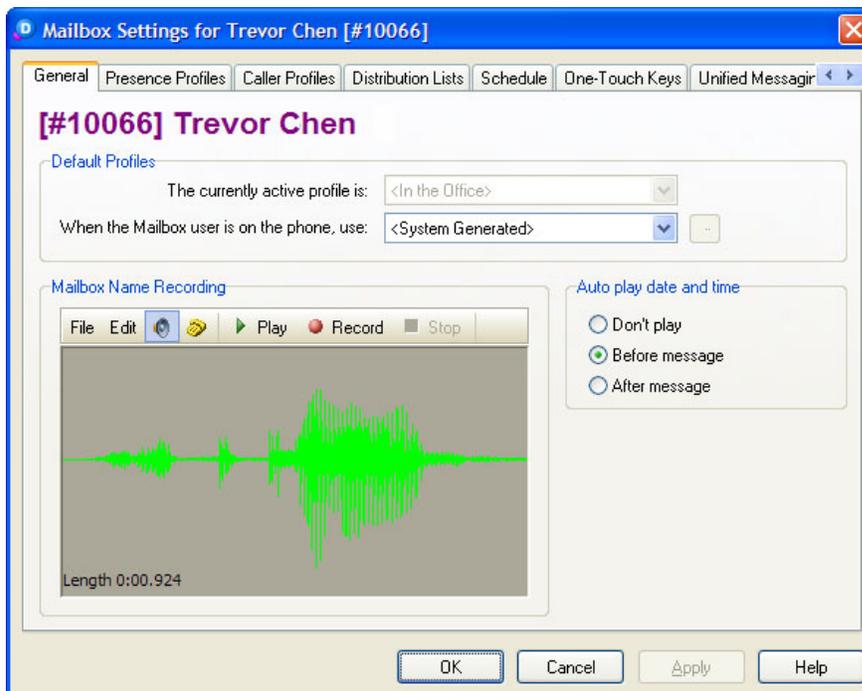
General Tab

Record a Personal Busy Greeting

- Click the **General** tab, and then record the mailbox name in the **Mailbox Name Recording** section.



Note: If no mailbox name is recorded, the system uses the mailbox number (e.g., "6334 does not answer").



2. From the **When the Mailbox User is on the Phone, Use** list, select **Personal**.
3. Click the **Edit** button.
4. Record a personalized greeting for callers who call your extension while you are on the phone.



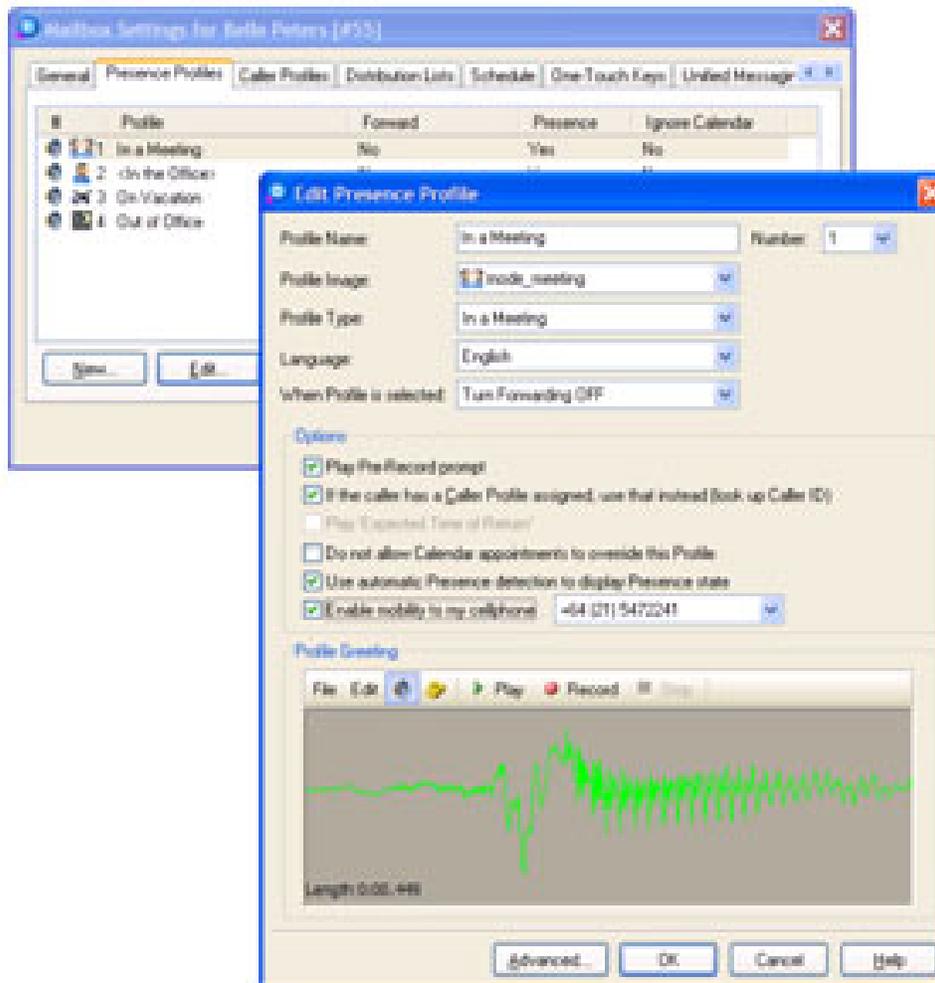
Note: If no personalized busy greeting is recorded, the system plays a default message.

Presence Profiles Tab

Use the Presence Profiles tab to create, edit, and record all of the different profile greetings, such as:

- Out of the Office
- On Vacation
- In Training
- Each day of the week (e.g., “Today is Monday, and I am currently in the office, but unable to take your call...”).

1. Click the **Presence Profiles** tab, and then select the Presence profile to edit.



2. Record the Presence profile greeting, ensuring to select the correct language if working in a multi-lingual environment.
3. If required, update any other settings. Refer to the online help for more detailed information.

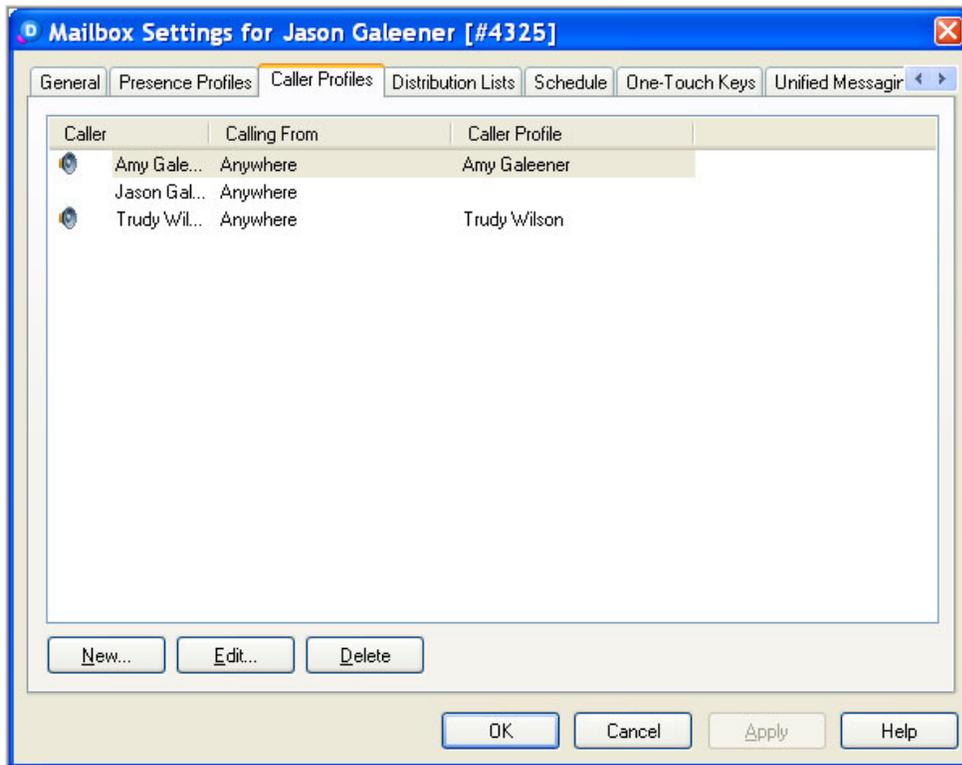
Sample Greetings

Greeting Type	Verbiage
Busy Greeting	Hi, you've reached <your name>. I'm currently on the phone. Press 1 to hold, or stay on the line to leave a message. Thank you.
In the Office	Hi, you've reached <your name> at <company name>. I'm in the office, but currently away from my desk. You can press 0 now for the operator, or please leave me a detailed message after the tone and I'll return your call as soon as I can. Thank you.
In a Meeting	Hi, you've reached <your name> at <company name>. I'm in a meeting. You can press 0 now for the operator, or please leave me a detailed message after the tone and I'll return your call as soon as I can. Thank you.
Out of the Office	Hi, you've reached <your name> at <company name>. I'm currently out of the office. For operator assistance press 0, otherwise please leave me a detailed message after the tone and I'll return your call as soon as I can. Thank you for calling.
On Vacation	Hi, you've reached <your name> at <company name>. I'm currently on vacation. For urgent inquiries, please contact <name and details>. Thank you.
Lunch	Hi, you've reached <your name> at <company name>. I'm currently at lunch. You can press 0 now for the operator, or please leave me a detailed message after the tone and I'll return your call as soon as I can. Thank you.

Caller Profiles Tab

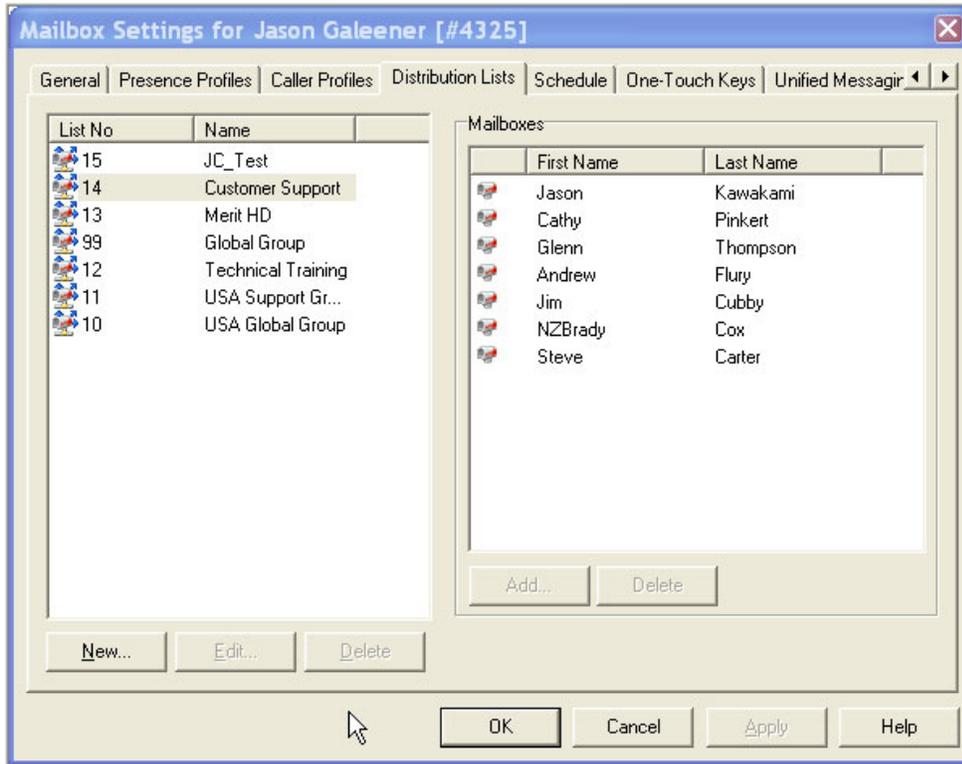
Create custom greetings for special people who call. When these people call your extension from a known phone number, they hear a custom recording and can access one-touch keys that are created just for them. If you include yourself in the customized list, you can set up a profile that configures how to access your voicemail. When calling into your voicemail, the system recognizes you and automatically logs you in.

You can set your own caller profile to bypass the PIN, auto-play messages, and use the toll-saver function, which activates when calling voicemail from outside the office. If the phone rings three times before answering, then there are no messages and you can hang up (saving the phone call toll fee). If the voicemail picks up right away, then there are messages.



Distribution Lists Tab

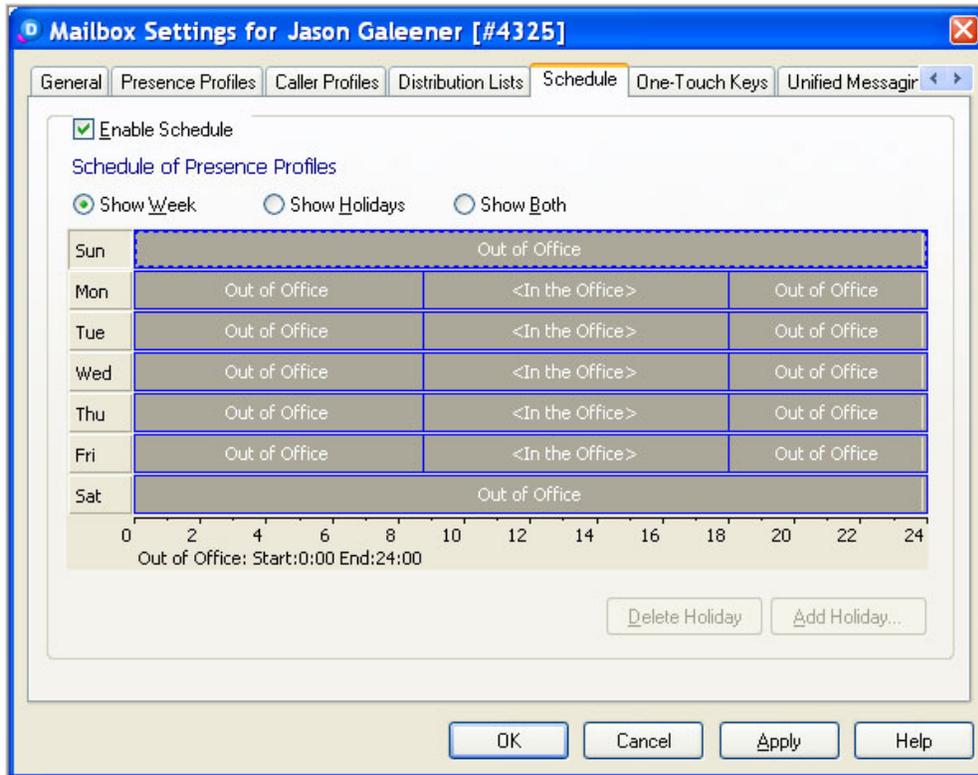
The Distribution Lists tab is for creating user-defined distribution lists, which allow a message to be sent to a group of people via the phone without having to call them one at a time (similar to an email distribution list). Up to nine lists can be created by each individual.



Schedule Tab

The Schedule tab is used to automatically select and activate different Presence profiles according to defined times and days of the average work week.

If working a standard Monday through Friday shift from 8:00am to 5:00pm, this schedule can be set to automatically put you into the **In the Office** profile during those times. The schedule can also automatically put you in the **Out of the Office** profile during non-working hours.



One-Touch Keys Tab

Default one-touch keys can be set and used when people call into your voicemail. Various actions can be assigned to the numbers on the keypad.

Key:	Action:	Additional Info:
0	<Company Default>	Transfer to Operator
1	Transfer to...	+1 (714) 5551212
2	Transfer to...	6386
3	Transfer to PA...	6385 <Currently Active>
4	Quick Record	
5	<Company Default>	Mailbox Direct Dial
6	<Company Default>	Direct Dial [4]
7	<Company Default>	Exit
8	<Company Default>	Name Search
9	<Company Default>	Allow caller to wait (Park)
#	<Company Default>	Login
*	<Company Default>	Record

Default action when Mailbox user is on the phone:
Record

Some of the available one-touch options are:

- **Direct Dial** = Assigns the direct dial function to the keypad number corresponding to the leading digit of internal extension numbers in the system. Callers can directly call any other extension in the system if they know the number.
- **Silent Transfer** = Transfers the caller to another number without playing the usual transfer announcement.
- **Transfer to PA** = Transfers callers to the Personal Assistant (or any other internal extension specified), and recalls to your mailbox if the Personal Assistant is not available.



Help: Press **F1** for descriptions of all the other options available in this window.

Email/Calendar Integration Tab

Use the **Email/Calendar Integration** tab to configure how voice messages, faxes, and emails synchronize with the mailbox. All of the options may or may not be available depending on the licenses/modules that the company has purchased/configured.

The screenshot shows the 'Mailbox Settings for Trevor Chen [#10066]' dialog box with the 'Email/Calendar Integration' tab selected. The dialog has several tabs: 'Distribution Lists', 'Schedule', 'One-Touch Keys', 'Email/Calendar Integration', 'Notification', and 'Advanced'. The 'Email/Calendar Integration' tab contains the following options:

- Do not use email or calendar integration
- Send voice messages as email attachments
- Use Unified Messaging for Exchange/Lotus (includes message/email synchronization and calendar integration)

Under the 'Using Desktop, Console, or Phone' section:

- When voice message is marked Read, delete Email in Email Client Application
- When voice message is deleted, delete Email in Email Client Application
- When the system deletes a (voice) Email in Email Client Application, delete it permanently
- When Fax is deleted, delete Email in Email Client Application
- When the system deletes a (fax) Email in Email Client Application, delete it permanently

Under the 'Using Email Client Application' section:

- When Email is deleted, delete voice message
- When Email is undeleted, undelete voice message
- When Email is deleted, delete Fax
- When Email is undeleted, mark Fax as new

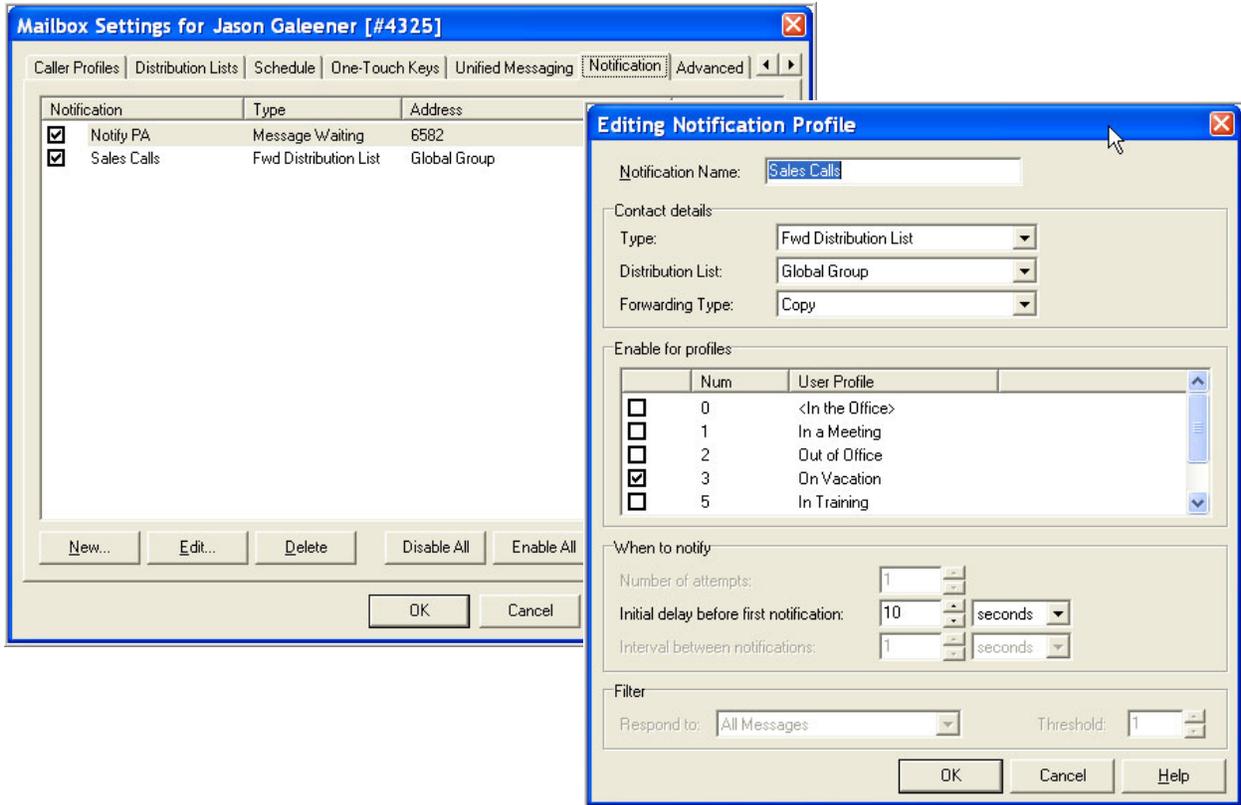
Below these sections are three dropdown menus:

- Voice file attachment format: MP3
- Fax file attachment format: TIFF
- Profile for Calendar events: In a Meeting

At the bottom, there is a checked checkbox: Display current Calendar event name when other users view my Presence details (ETR is always shown). The dialog concludes with 'OK', 'Cancel', 'Apply', and 'Help' buttons.

Notification Tab

Voicemail can be set up to notify any pre-specified address when a message is left in the mailbox. A number of notification profiles can be set up to notify different types of destinations (e.g., extensions, pagers, telephones, email).



Advanced Tab

The Advanced options are mainly used by the administrator to configure security, message indicators, time zones, and multi-language support.

Mailbox Settings for Trevor Chen [#10066]

Distribution Lists | Schedule | One-Touch Keys | Email/Calendar Integration | Notification | **Advanced**

Security

User ID: 89637
Mailbox Class: Advanced Users

Message Waiting Display on Phone

Show Message waiting light on Extension: []
When sharing Extension use message no: 1

Light remains on until all messages are saved or deleted
 Light is turned off once all messages are "read" (played/viewed)

Fax Printing Options

Automatically print personal incoming faxes
Printer: <Default Printer>

Languages

User Language: English
Caller Languages:
 <DEFAULT>
 English
 French

Message Order

Saved: Oldest message first
Deleted: Oldest message first

Time Zone: (GMT+12:00) Auckland, Wellington

OK Cancel Apply Help

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