

**PathFinder**

**Voice Processing System**



**User Guide**





 **Path** Finder

The logo icon for Path Finder, consisting of a square with a stylized circuit board or path design inside.

**Voice Processing System**

# *User Guide*

January, 2005 - Issue 4.6

<b>Issue</b>	<b>Release Date</b>	<b>Changes</b>
1	04-98	Initial Release
2	04-99	Heading and content changes have been made for clarification and user readability.
3	06-01	The layout of this user guide was reformatted, no changes to content have been made.
4	12-02	Mailbox options and Quick Reference diagrams have been revised to reflect software changes.
4.5	12-03	Forward replies to multiple mailboxes added.
4.6	01/05	Minor revisions for correctness and clarity.

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## Getting Started

This section is intended to familiarize you with many of the basic *PathFinder* features, provide a basic overview of voice mail and auto-attendant fundamentals, and help you log on to and personalize your own voice mailbox.

### *Guidelines*

The information in this section provides a basic understanding of *PathFinder's* voice messaging and auto-attendant features.

Feature	Explanation
Voice Messaging	<p>The terms <b>Voice Messaging</b> and <b>Voice Mail</b> are used interchangeably in this manual.</p> <p>These terms refer to activities such as sending and retrieving messages and comprise much of your day-to-day telephone communications.</p>
Menus	<p>A <b>Menu</b> is a group of features or selections that can be accessed by using the dial pad of any push-button telephone.</p> <p>Menus are constructed in a branching tree structure:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Main menus offer general options.</li> <li><input type="checkbox"/> Subsequent menus offer more specific options.</li> </ul>
Universal Command Keys	<p><b>Universal Command Keys</b> include the [*],[#], and [9] keys, which help you navigate through the <i>PathFinder</i> menu structure.</p> <p>Use these keys to control <i>PathFinder</i> menus:</p> <ul style="list-style-type: none"> <li>[*] Replay the current menu options</li> <li>[#] Return to the previous menu</li> <li>[9] Terminate the call</li> </ul> <p>These keys are also used at specific points to gain access to certain features.</p>

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*Getting Started*

<b>Feature</b>	<b>Explanation</b>
Key-Ahead	<p>As you gain experience and become familiar with <i>PathFinder's</i> menus, you may not need to listen to all of the menu selections to know what option you want to select. Therefore <i>PathFinder</i> provides a <b>Key-Ahead</b> feature.</p> <p>This feature allows you to override the voice prompts and enter a string of commands without having to wait for the entire voice prompt to be played.</p>
Password	<p>To log on to your voice mailbox, you will need the correct <b>Password</b>.</p> <p>Your System Administrator will provide you with the initial password for your mailbox. You will change this password when you personalize your mailbox.</p>
Mailbox Greeting	<p>Your <b>Mailbox Greeting</b> is a voice recording that you record using your own voice.</p> <p>This recording is heard by callers when <i>PathFinder</i> routes a call to your personal mailbox.</p>
Mailbox Name	<p>Your mailbox is identified by your <b>Mailbox Name</b>, which is a recording of you saying your own name.</p> <p>If no mailbox name is recorded, <i>PathFinder</i> will refer to your mailbox by its assigned number.</p>
Desktop Mailbox Features	<p>If you have access to the <i>optional</i> Desktop Call Control module, you may be presented with additional mailbox options not referenced in this book, such as: E-mail Messages and Locator Rules.</p> <p>Check with your System Administrator for software availability, or refer to the Desktop User Guide for more detailed information.</p>

## Logging On

How you log on to *PathFinder* depends on whether or not you have an integrated system.

## Integration

Integration tells *PathFinder* whether or not you are calling from your extension. This allows you to skip some of the steps normally needed to log on. Ask the System Administrator whether or not your system is integrated.

Once you determine whether your system is integrated, follow the appropriate logon procedure as described.



*When you are trying to log on to PathFinder from an outside telephone, the logon procedure is the same whether you have an integrated system or a non-integrated system. Refer to "To Log On From an Outside Telephone:" on page 4 for more information.*

### Non-Integrated System

1. Press the voice mail key on your telephone, or dial *PathFinder's* internal extension. *PathFinder's* main menu greeting will play. It may be similar to the following: "Thank you for calling A-Z Communications. Enter the mailbox number of the person you are trying to reach".
2. Press the voice mail access key (as designated by your System Administrator).
3. Enter your mailbox number, your mailbox greeting will play.
4. Press [\*], the following prompt will play: "Please enter your password".
5. Enter your password.

### Integrated System

1. Press the voice mail key on your telephone, or dial *PathFinder's* internal extension.
2. Enter your password when prompted to do so.

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*Getting Started**To Log On From an Outside Telephone:*

1. Dial *PathFinder's* remote access telephone number. *PathFinder's* main menu greeting will play. It may be similar to the following: "Thank you for calling A-Z Communications. Please enter the mailbox number of the person you are trying to reach".
2. Press the voice mail access key (as designated by your System Administrator).
3. Enter your mailbox number. Your mailbox greeting will play.
4. Press [\*]. The following prompt will play: "Enter password".
5. Enter your password. You will then be able to access your messages and/or mailbox options.

**Log On Activities**

Once you are logged on, *PathFinder* will tell you how many new messages you have received since you last logged on to your mailbox, and how many saved messages are currently in your mailbox.

*After hearing the number of messages ...*

you will be prompted with the main menu, from which you can press [1] to retrieve your messages. Refer to "[Retrieving Messages \[1\]](#)" on [page 7](#) for more information.

*If you have no messages ...*

*PathFinder* will prompt you to select one of the other main menu options:

- 2 - send a message
- 8 - change personal options
- 6 - edit extended options
- 0 - transfer to a mailbox or extension

## *Personalizing Your Mailbox*

As a new user, the first thing to do is personalize your voice mailbox.

### **Required Information**

After logging on to *PathFinder*, you should record a personalized greeting, record your mailbox name, and change the password. To perform these tasks, you must have the following information:

*PathFinder* access telephone number: \_\_\_\_\_

*PathFinder* access extension: \_\_\_\_\_

Your voice mailbox #: \_\_\_\_\_

Initial password: \_\_\_\_\_

Your extension #: \_\_\_\_\_

*If you don't have this information ... contact your System Administrator.*

### **First-Time Setup**

The first time you log on your voice mailbox, the *PathFinder* tutorial will walk you through the steps needed to personalize your mailbox.

*If the tutorial option has been disabled* by your System Administrator, you will still be able to personalize your mailbox without online assistance. In three steps, you can record a personal greeting, record a mailbox name, and edit your password.

#### *Access Mailbox Using Tutorial*

1. When prompted, record a mailbox name. This name is used when callers are being transferred to your extension and when you forward messages.
2. When prompted, record a Mailbox Greeting. This is the greeting played for callers who reach your mailbox.
3. Edit your password. Refer to "[Password Selection](#)" on page 29 for hints on selecting a password.

Once these tutorial items have been completed, *PathFinder* will tell you the number of new and saved messages in your mailbox. You are now ready to start using your voice mailbox.

**NOTE** ... If you decide not to complete the tutorial at this time, the system will start the tutorial the next time you access your mailbox.

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*Getting Started**Access Mailbox Without Tutorial*

Listen to the voice prompts as you complete these steps:

1. Log on to your mailbox by dialing the *PathFinder* access number and following the instructions. Refer to [“Logging On” on page 3](#) for more information. If you do not know the initial password, contact your System Administrator.
2. After you hear the *PathFinder* main menu, press [8] to change personal options.
3. Perform the following steps to **record a greeting**:
  - a. Press [1] to edit your mailbox greeting.
  - b. Press [1] to record the standard greeting.
  - c. Press [2] to record.
  - d. Listen for the beep, record your greeting, then press [#] to stop recording.
  - e. Press [#] to return to the Personal Options menu.
4. From the Personal Options menu, **edit your password** as follows:
  - a. Press [2] to edit your password.
  - b. Enter your new password, then press [#]. Refer to [“Password Selection” on page 29](#) for hints on selecting a password.
  - c. Press [#] to return to the Personal Options menu.
5. From Personal Options menu, **record mailbox name** as follows:
  - a. Press [3] to edit your mailbox name.
  - b. Press [2] to record a mailbox name.
  - c. Listen for the beep, say your name, then press [#] to stop recording.
  - d. Press [#] to return to the Personal Options menu.

You are now ready to begin using your voice mailbox ...

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## Retrieving Messages [1]

*PathFinder* manages a wide variety of messaging activities. Your mailbox not only stores voice messages but can also be used to store and retrieve other types of messages. For that reason, *PathFinder* mailboxes are called "Universal Mailboxes."

**Message Types** -- *PathFinder* will inform you of the number and type of new and saved messages stored in your mailbox.

Messages can be any of the following types:

- Voice Messages
- Pager (Beeper) Messages
- Fax Messages
- E-Mail (with optional upgrades)

**Playback Order** -- When you retrieve messages, *PathFinder* will play back all messages stored in your mailbox.

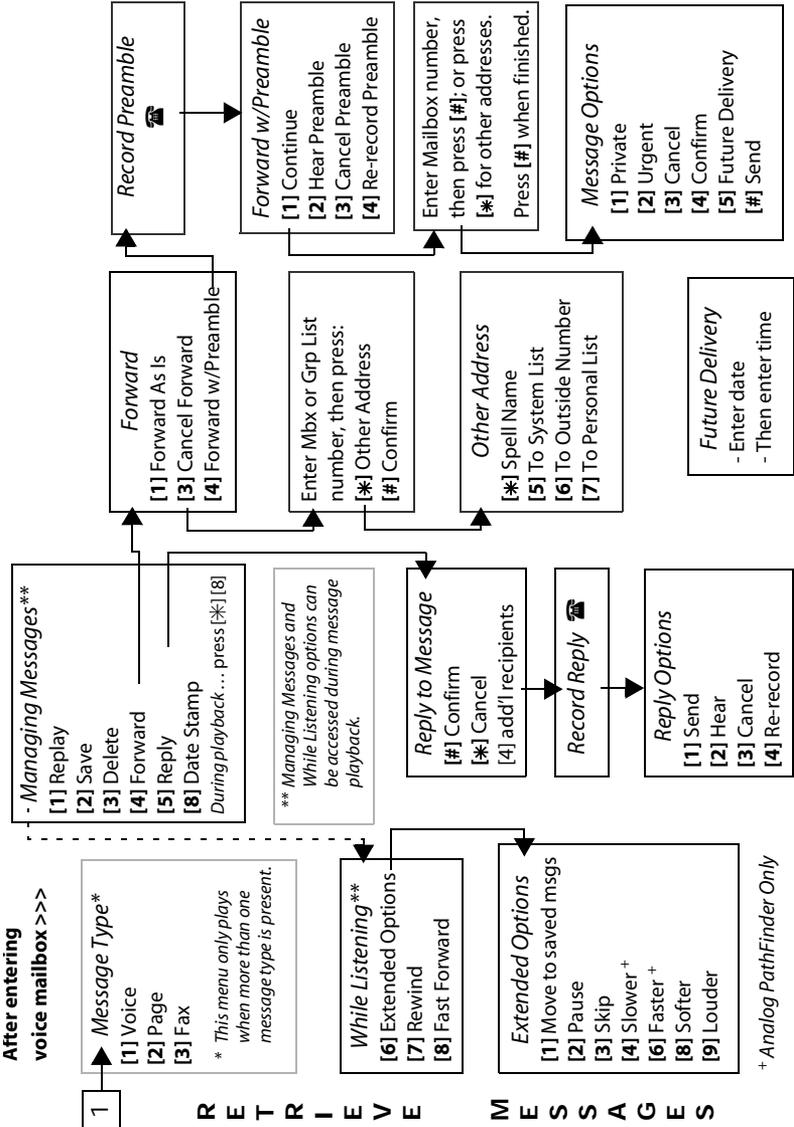
- Urgent messages are played back before new messages, and new messages are played back before saved messages.
- The order that saved messages are played back is determined by your System Administrator (usually ... first in, first out).



*Systems with telephone integration may use message waiting lamps to notify you of new messages.*

Retrieving Messages [1]

**To Access Retrieve Messages** -- Press [1] at the *PathFinder* main menu to hear the Retrieve Message options available.



## Voice Messages

Voice messages will be played in the following order:

- 1) Urgent
- 2) New
- 3) Saved

## Retrieving a Voice Message

1. Log on to *PathFinder* (refer to [“Logging On” on page 3](#)).
2. Press [1] to retrieve messages.
3. Press [1] to retrieve *voice* messages.



*Retrieval for a certain message type (e.g., voice messages, fax messages, and so on) is only offered if that type of message has been left in your mailbox.*

**While Listening** -- *PathFinder* offers three useful message control options that are active while listening to a voice message:

- [6] = Extended Options
- [7] = Rewind
- [8] = Fast Forward

**Extended Options** -- Use these options to control how your messages are played back. Press [6] while listening to a message to hear the following extended message options:

- [1] = Save      Move to saved messages to play at a later time
- [2] = Pause     Put message temporarily on hold
- [3] = Skip       Proceed to next message
- [4] = Slower\*   Slow down message playback
- [6] = Faster\*    Speed up message playback
- [8] = Softer     Reduce message volume
- [9] = Louder    Increase message volume

*\* Analog PathFinder only*

**Message Management** -- Refer to [“Managing Messages” on page 12](#) for more information on message management options once a message has been selected.

## *Pager Messages*

In addition to voice messages, you may receive and store pager messages in your mailbox.

- ❑ When someone leaves a pager message, *PathFinder* records the numeric information.
- ❑ When you retrieve the pager message, *PathFinder* plays back the phone number.

**Notification** -- You can set up *PathFinder* to call your paging company you when you have new pager messages.

Depending on how your System Administrator configures your implementation, you can be notified on your pager with either your *PathFinder* mailbox number or the pager message itself.

Refer to [“Notification Options” on page 33](#) for details on setting up your mailbox for message notification through an outside number, such as a pager.



*The ability to receive pager messages is a COS (class of service) option. Check with your System Administrator to see if this option has been enabled in your COS.*

## **Retrieving a Pager Message**

1. Log on to *PathFinder* (refer to [“Logging On” on page 3](#)).
2. Press [1] to retrieve messages.
3. Press [2] to retrieve any pager messages you may have received.

When selected, the system will repeat the retrieve option number.



*This option is only available if you have received a pager message.*

**Message Management** -- Refer to [“Managing Messages” on page 12](#) for more information on message management options once a message has been selected.

## Fax Messages

Your voice mailbox can also be used to receive and store fax transmissions. This feature can be useful for the following activities:

- Receiving confidential faxes
- Getting faxes while traveling or away from your telephone
- Passing identical fax information to other *PathFinder* users

You don't have to worry about the fax getting lost or misplaced. You can store faxes until you are ready to retrieve them.

Fax messages can be printed on any fax machine, making it possible to retrieve a fax message from virtually any telephone, anywhere.



*The ability to receive fax messages is a COS option. Check with your System Administrator to see if this option has been enabled in your COS.*

## Retrieving a Fax Message

1. Log on to *PathFinder* (refer to "[Logging On](#)" on page 3).
2. Press [1] to retrieve messages.
3. Press [3] to retrieve any fax messages you may have.  
(If you have only fax messages, *PathFinder* will go directly to the fax retrieval menu.)
4. If you have new fax messages, you will be able to select one of the following actions:

1] = Send all new fax messages to a fax machine	Stores each sent fax as a saved message
[#] = Retrieve fax messages one by one	Puts messages temporarily on hold

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*Retrieving Messages [1]*

The following options will be available for each fax message until you delete them from your mailbox:

- [1] = Replay fax statistics
- [2] = Save fax message
- [3] = Delete fax message
- [4] = Forward fax message
- [5] = Send fax message to a fax machine
- [6] = Skip message

**Message Management** -- Refer to "[Managing Messages](#)" on page 12 for more information on message management options once a message has been selected.

### *Managing Messages*

*PathFinder* offers several message management options that are available during or after message playback.



*After a message has been saved or deleted, the other message options are no longer available for that message.*

### **Message Management Options**

The following options are available while reviewing messages:

- [1] = Replay the current message
- [2] = Save the message
- [3] = Delete the message
- [4] = Forward the message to another mailbox
- [5] = Reply to a voice message or send to a fax machine
- [8] = Date stamp (hear message date and time)



*To conserve the valuable space in your mailbox ... remove saved messages when no longer needed.*

## Forwarding Messages

You can use *PathFinder* to pass voice, page, and/or fax messages to other mailbox owners.

### Preambles

You can forward a message as is, or you can attach your own introductory comment (called a "preamble") to the message. The person to whom you forward the message will hear your preamble before hearing the forwarded message.

If a message you are forwarding already contains a preamble from a previous sender, you can either forward the message with the current preamble or add a new preamble of your own.



*A message can be forwarded with a maximum of nine preambles.*

### Forwarding a Message

1. Log on to *PathFinder* (refer to "[Logging On](#)" on page 3).
2. Press [1] to retrieve messages.
3. Review a message.
4. Press [4] to forward the message.
5. Then select from the following forward options:
  - [1] = Forward message as is (including any preambles already attached)
  - [3] = Cancel message forwarding
  - [4] = Attach your own preamble to the message (including any preambles already attached, up to eight)

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*Retrieving Messages [1]*

If you elected to forward the message as is ... proceed to *"Selecting a Destination"*.

If you opted to attach your own preamble ... perform these steps:

1. Record the preamble.
2. Then choose from the following options:
  - [1] = Continue
  - [2] = Hear preamble
  - [3] = Cancel preamble
  - [4] = Re-record preamble
3. After you finish editing a preamble, press [1] to continue.

## Selecting a Destination

After adding any preambles, you must then select a destination. *PathFinder* will allow you to forward a message either to a known mailbox number or to another destination (a guest mailbox, distribution list, outside number, or unknown mailbox number).

*To forward a message to a known mailbox number:*

Enter the mailbox number and press [#] to confirm the entry.

*To forward a message to an unknown mailbox number, or to select another type of address:*

1. Press [\*] and choose one of the following forward options:
  - [\*] = Forward to a mailbox based on the spelling of the mailbox owner's name
  - [5] = Forward to a system list
  - [6] = Forward to an outside telephone number
  - [7] = Forward to a personal distribution list (refer to *"Personal Distribution Lists" on page 35*)
2. After selecting the forwarding destination, press [#] to confirm.

## *Replying To Messages*

Use the reply feature to respond directly to another *PathFinder* mailbox owner who has left you a message. You do not have to enter the original sender's mailbox number when you send your reply.

If a response is not permitted, *PathFinder* will inform you that you cannot reply to this type of message.

### **Sending a Reply**

1. Log on to *PathFinder* (refer to "[Logging On](#)" on page 3).
2. Press [1] to retrieve messages.
3. Review a message.
4. Press [5] to reply to the message.
5. Press [#] to confirm the reply option (or [\*] to cancel).
6. Record your reply, when finished, press any key to continue.
7. When prompted, select from the following options:
  - [1] = Send your reply and remain in *PathFinder*
  - [2] = Hear/Review your reply
  - [3] = Cancel the reply
  - [4] = Re-record your reply

## *Stamping Messages with Time & Date*

*PathFinder* automatically attaches time and date information to each new message. You can hear this information at any time while a message is active (either during or after playback).

### **Listening to Time/Date Stamp**

1. Log on to *PathFinder* (refer to "[Logging On](#)" on page 3).
2. Press [1] to retrieve messages.
3. Review a message.

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*Sending Messages [2]*

4. To hear the time and date the message was received in your mailbox, you can perform one of the following playback options.

*While message is playing ...* press [\*] to interrupt message playback, then press [8] to hear time/date stamp,

-or-

*After message has finished playing ...* press [8] to hear time & date.

## Message Guidelines

**Message Statuses** -- If you hang up without deleting or saving a message, it is automatically saved in the same state as when you logged on to the mailbox (e.g., a new message will still be registered as a new message).

**Retention Period** -- *PathFinder* automatically deletes saved messages after a certain period of time, called the retention period. Messages are typically retained by *PathFinder* for one week. Ask your System Administrator to determine your message retention period.

**Automatic Forwarding** -- Messages can automatically be forwarded to another *PathFinder* mailbox or to another extension. This can be useful in situations where you will be away for an extended period of time and you want someone else to monitor your messages. Refer to "[Mailbox State](#)" on [page 34](#) for details on forwarding options.

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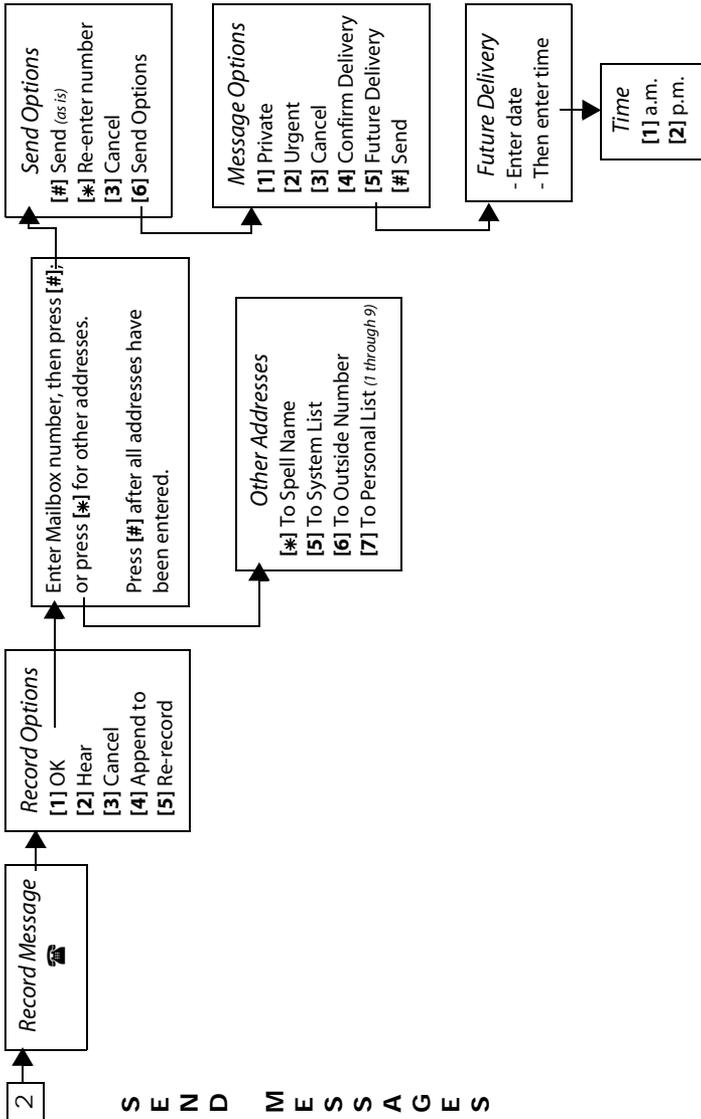
## Sending Messages [2]

*PathFinder* provides you with the ability to communicate with other people even when they aren't available. You accomplish this by sending a message directly to the person's mailbox. Effective use of voice messages can improve communication and reduce the amount of time wasted playing telephone tag.

Sending a message is comprised of the following three steps:

- 1) Recording and editing the message
- 2) Selecting a destination
- 3) Selecting a message option

**To Access Send Messages** – Press [2] at the *PathFinder* main menu to hear the Send Message options available.



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*Sending Messages [2]**Recording***Recording a Message**

1. Log on to *PathFinder* (refer to *"Logging On" on page 3*).
2. Press [2] to send a message.
3. Record your message.
4. After recording, select one of the following options.
  - [1] = Send
  - [2] = Hear/Review your message
  - [3] = Cancel
  - [4] = Append to (pick up at the end of what you have already recorded)
  - [5] = Re-record (erase what you have already recorded and re-record a new message from the beginning)



*If you append or re-record your message, you must press [1] to send the message before you can go on to the next step.*

*Sending*

After recording your message, you are ready to send it.

**Selecting a Destination**

1. To choose a destination for your message, select one of the following address options:
  - a. Enter a mailbox number, then press [#] to confirm mailbox number,  
-or-
  - b. Press [\*] to select one of the other address options:
    - [\*] = A mailbox based on the spelling of the owner's name
    - [5] = A system list
    - [6] = A phone number outside your *PathFinder* system
    - [7] = A personal distribution list (refer to *"Personal Distribution Lists" on page 35*)

2. Select one of the following send options:
  - [#] = Send message as is
  - [\*] = Re-enter the mailbox number
  - [3] = Cancel
  - [6] = Send Options
3. To send the message to more addresses, repeat this procedure (starting with Step 1).
4. When you have sent the message to all desired destinations, press [#].

## Send Options

if you press [6] while in the Send Options menu, you can choose one of the following Message Options to designate how and when to send your message:

[1] = Private	Prevents message from being forwarded
[2] = Urgent	Moves message to front of message queue
[3] = Cancel	Terminates your message selections
[4] = Confirm Delivery	Repeats these options to allow further selections
[5] = Future Delivery	Sends messages at a future date or time

**Confirm Delivery** -- If you select [4] from the Message Options menu, the message options will be repeated to allow you to make additional selections.

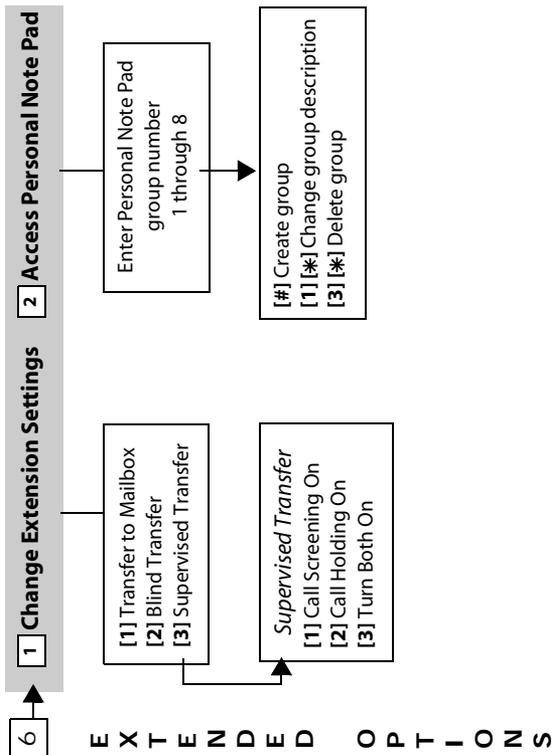
**Future Delivery** -- If you select [5] from the Message Options menu to request future delivery of your message, complete these steps:

1. Enter the date for delivery.
2. Enter the time for delivery.
3. Indicate a.m. or p.m. for the time you entered:
  - [1] = a.m.
  - [2] = p.m.

## Extended Options [6]

Extended options provide control over certain extension settings, which control how *PathFinder* transfers calls to your extension. Other extension options are used to turn call screening and caller holding on and off. You can also access the personal voice Note Pad from the Extended Options menu. The personal Note Pad can be used to store and retrieve information over the telephone.

**To Access Extended Options** -- Press [6] at the *PathFinder* main menu to hear the various Extended Options available.



## *Extension Settings [1]*

Extension settings options let you select how a call is processed when transferred to your extension.

### **Call Transfer Options**

*PathFinder* offers the following types of call transfer options:

**Immediate Transfer** -- If immediate transfer to a mailbox is selected, *PathFinder* does not ring your extension. The call is immediately forwarded to your mailbox.

**Blind Transfer** -- Blind transfers are often referred to as unsupervised transfers because *PathFinder* transfers the call to your extension and does not wait to see if you answer. The call will go unanswered if you are not available to receive it. Calls will not be forwarded to your mailbox.

**Supervised Transfer** -- In supervised transfers, *PathFinder* monitors whether or not you answer your phone. If you do not answer, the call is transferred according to your call forwarding instructions.



*If your PathFinder implementation has telephone integration, **do not** change transfer options without consulting your System Administrator.*

## **Changing Extension Settings**

1. Log on to *PathFinder* (refer to [“Logging On” on page 3](#)).
2. Press [6] to change extended options.
3. Press [1] to edit extension settings.
4. The following options are available:
  - [1] = Immediate transfer to a mailbox
  - [2] = Blind transfer
  - [3] = Supervised transfer (refer to [“Supervised Transfer Options” on page 22](#))

## Supervised Transfer Options

If you select supervised transfer as your extension setting, *PathFinder* offers the following additional options:

- [1] = Call Screening only
- [2] = Call Holding only
- [3] = Both Call Screening and Call Holding
- [#] = Neither Call Screening nor Call Holding

**Call Screening** -- allows you to hear who is calling you before you accept the call.

Prior to transferring a call to your extension, *PathFinder* asks the caller to say their name. *PathFinder* then rings your extension and prompts you with the message, "Your Caller is <Person's Name>."

After you hear the caller's name, *PathFinder* will provide you the following options:

- Accept the call
- Reject the call (sends the call to your mailbox)
- Send the call to another extension
- Send the call to another mailbox
- Hear the person's name again

**Call Holding** -- allows callers to wait on hold if your extension is busy.

*PathFinder* informs the caller that your line is busy and asks if they want to hold, transfer to a different extension, or leave a message.

The option to leave a message is only offered if your *PathFinder* implementation supports voice mail.



*Call holding and call screening may be disabled by the System Administrator.*

## *Personal Note Pad [2]*

Selecting the Personal Note Pad gives you access to *PathFinder's* programmable voice database. The Note Pad records any kind of information that you want to retrieve at a later time.



*The amount of information that each group can store is only limited by the amount of available disk space.*

## **Sample Scenario**

If you want to keep track of your customers' phone numbers, you would perform the following steps using your customer information.

*For example:*

1. Create an information group number [1] with a group description of "Customer Accounts."
2. Create a keyword or ID for each entry in this group.
  - Keyword/ID [6] + [2] + [4] translates to MCI on the telephone key pad.
  - Keyword/ID [7] + [7] + [7] for Sprint translates to SPR on the telephone key pad.
3. Record this group's keyword/ID entries.
  - Under the keyword/ID [6] + [2] + [4], record any desired information about MCI, such as your contact name, their phone number and address.
  - Under the keyword/ID [7] + [7] + [7], record any desired information about Sprint.

## Setting Up a Group & Keyword/ID

1. Log on to *PathFinder* (refer to "[Logging On](#)" on page 3).
2. Press [6] for extended options.
3. Press [2] to access the Personal Note Pad.
4. Press key [1] thru [8] for any unused group number.
5. Press [#] to confirm that you want **to create a group**.
6. Record a description for the group (e.g., "Customer Accounts"), then press [#] when finished recording. You have now created and named a group.
7. Select the number for the group you just created.
8. Enter a new keyword/ID for the first entry in this group, then press [#].



*Keywords/IDs can be any combination of keys from [0] to [9], and up to eight digits in length.*

9. Press [#] to record the entry for that keyword/ID, then press [#] when you are finished.
10. If you want to record any other keyword/ID entries for this group, complete Steps 8 and 9 for these entries. Press [#] when you are finished recording keyword/ID entries for this group.
11. Press [#] once to return to the group selection menu, twice to return to the Extended Options menu, or three times to return to the main menu.

## Editing Group/ID Entries

1. Log on to *PathFinder* (refer to "[Logging On](#)" on page 3).
2. Press [6] for extended options.
3. Press [2] to access the Personal Note Pad.
4. Press a key for any existing group number, from [1] through [8].
5. **To edit a group**, select one of the following options:  
 Change group description = [1] + [\*]  
 Delete group and all IDs = [3] + [\*]

6. **To edit or review a keyword/ID**, enter the keyword/ID for the desired entry in a group, then press [#]. *PathFinder* will play the selected entry.
7. You can then choose from the following options:
  - [1] = Review the ID entry
  - [2] = Re-record the ID entry
  - [3] = Delete the ID entry
  - [4] = Append to the ID entry
  - [#] = Return to previous menu

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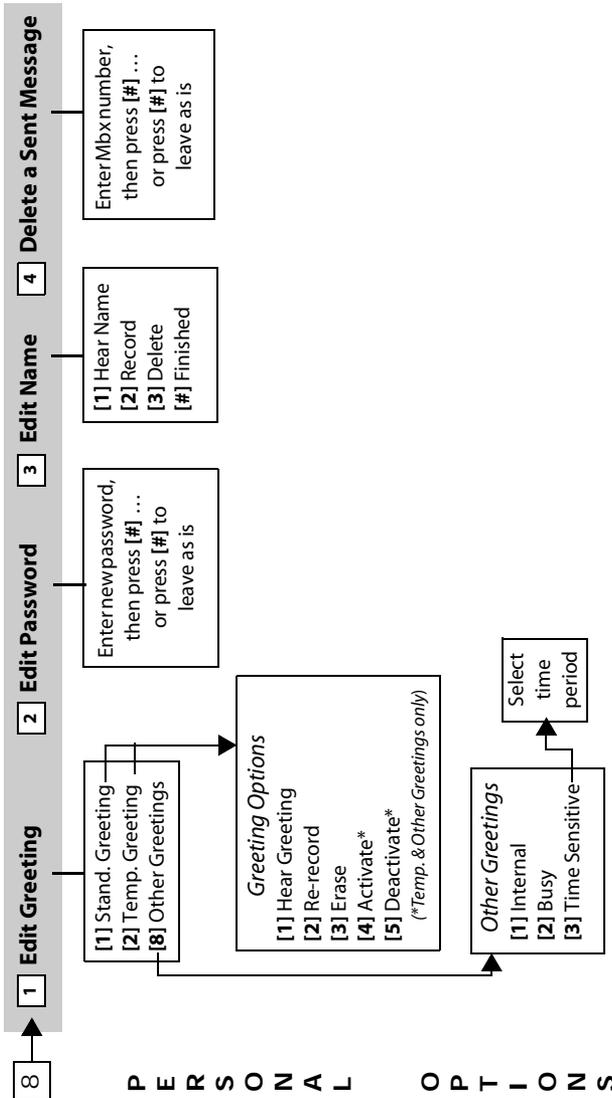
## Personal Options [8]

As a mailbox owner, you have control over many of the features of your mailbox, *PathFinder* allows you to modify the following mailbox options to meet your personal requirements:

[1] = Greeting	Plays when callers reach your mailbox.
[2] = Password	Used to log on to your mailbox to access messages and mailbox features.
[3] = Name	Identifies your mailbox with the name you recorded.
[4] = Delete sent message	Allows you to remove a sent message that has not yet been retrieved or saved.
[8] = Other Options	Lets you modify notification methods, system lists, and guest mailboxes.

Personal Options [8]

To Access Personal Options -- Press [8] at the PathFinder main menu to hear the various Personal Options available.



## *Greeting [1]*

The mailbox greeting is a message from you that callers hear when they reach your mailbox. It usually tells callers that you are not available and instructs them to leave a message. *PathFinder* supports three types of greetings as described.

### **Standard Greeting**

The standard greeting is a generic greeting played when your mailbox is reached by a caller. A typical personalized standard greeting might sound like this:

"You have reached Beth Williams. Please leave your name, number, and a short message, and I'll get back to you."



*When recording your greeting, you can review and edit it until you are satisfied with how it sounds.*

### **Temporary Greeting**

A temporary greeting can be used whenever your greeting needs to be changed on a temporary basis. Use the temporary greeting for extended periods of absence from the office, such as business trips or vacations, to inform callers that you will be away from your desk for a period of time.

### **Recording a Greeting**

1. Log on to *PathFinder* (refer to ["Logging On" on page 3](#)).
2. Press [8] to change personal options.
3. Press [1] to edit greeting.
4. Select the greeting to edit:
  - [1] = Standard Greeting
  - [2] = Temporary Greeting
  - [8] = Other Greetings (refer to ["Other Greetings" on page 28](#))

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*Personal Options [8]*

## 5. Edit the greeting, using the following menu options:

[1] = Hear Greeting

[2] = Re-Record the Greeting

[3] = Erase the Greeting

[4] = Activate (Temporary or Other Greetings only)

[5] = Deactivate (Temporary or Other Greetings only)



*To deactivate your Temporary Greeting, erase it. If you erase your Standard Greeting, a default system greeting (giving your mailbox number) plays for callers.*

## Other Greetings

You can customize your greeting based on the following parameters:

- |                                |   |
|--------------------------------|---|
| [1] = Internal Greeting        | heard only by other <i>PathFinder</i> users when they reach your mailbox.             |
| [2] = Busy Greeting            | plays only while you are using your phone and Supervised Transfers have been enabled. |
| [3] = Time Sensitive Greetings | used to assign different greetings to different time periods.                         |



*Not all PathFinder implementations support internal greetings. Please consult your System Administrator for more information.*

**Time Sensitive Greetings** -- can be set to play during certain *PathFinder*-defined time periods, such as:

- Different times during the day
- After hours
- Weekends
- Holidays

Time periods are set by your System Administrator. To find out what time settings are available, contact your System Administrator.

## *Password [2]*

To keep your messages confidential and prevent unauthorized use of your mailbox, use a mailbox password. Change your password periodically to help maintain privacy or as often as you like.

Passwords are typically four-digit numbers. If you forget your mailbox password, your System Administrator can reset it for you.

### **Password Selection**

A password should be easy to remember, but not easy for someone else to discover.

- The last four digits of your best friend's home phone number or your favorite uncle's birth date ARE good passwords.
- Consecutive or duplicate numbers are NOT good passwords.  
*Example ... [1] + [2] + [3] + [4] or [5] + [5] + [5] + [5].*
- Using the keypad to spell out a word that is meaningful only to you also works well.

### **Editing Your Password**

1. Log on to *PathFinder* (refer to "[Logging On](#)" on page 3).
2. Press [8] to change personal options.
3. Press [2] to edit mailbox password.
4. Choose from these options when editing your mailbox password:
  - [1] = Review password
  - [2] = Record a new password

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*Personal Options [8]**Mailbox Name [3]*

Recording your name provides a personalized identity for your mailbox. When callers leave messages, they hear something similar to the following: "Message has been sent to Jeff Brown." This confirms that messages have been sent to the correct person.

If a name is not recorded for a mailbox, callers will hear the following: "Message has been sent to Mailbox 1234."

**Editing Mailbox Name**

1. Log on to *PathFinder* (refer to "[Logging On](#)" on page 3).
2. Press [8] to change personal options.
3. Press [3] to edit mailbox name.
4. Choose from these options when editing your mailbox name:
  - [1] = Hear the current mailbox name
  - [2] = Record a new mailbox name

*Delete Sent Messages [4]*

You have the option of deleting a message that you have sent, as long as the message has not yet been saved or deleted.

**Deleting a Sent Message**

To delete a message that has been sent, perform the following steps:

1. Log on to *PathFinder* (refer to "[Logging On](#)" on page 3).
2. Press [8] to change personal options.
3. Press [4] to delete sent messages.
4. Enter mailbox number where you sent the message and press [#].



*You can leave messages untouched by pressing only [#] (without entering a mailbox number first).*

5. As *PathFinder* plays each sent message, press either [#] to retain the message or [3] to delete it.

If you press [3] to delete a message ... you must then press either [#] to confirm deletion or [3] to abort deletion.

## *Other Options [8]*

As a mailbox owner, you have control over certain additional options and features, including the following:

- Message Notification
- Mailbox State
- Personal Distribution Lists
- Guest Mailboxes

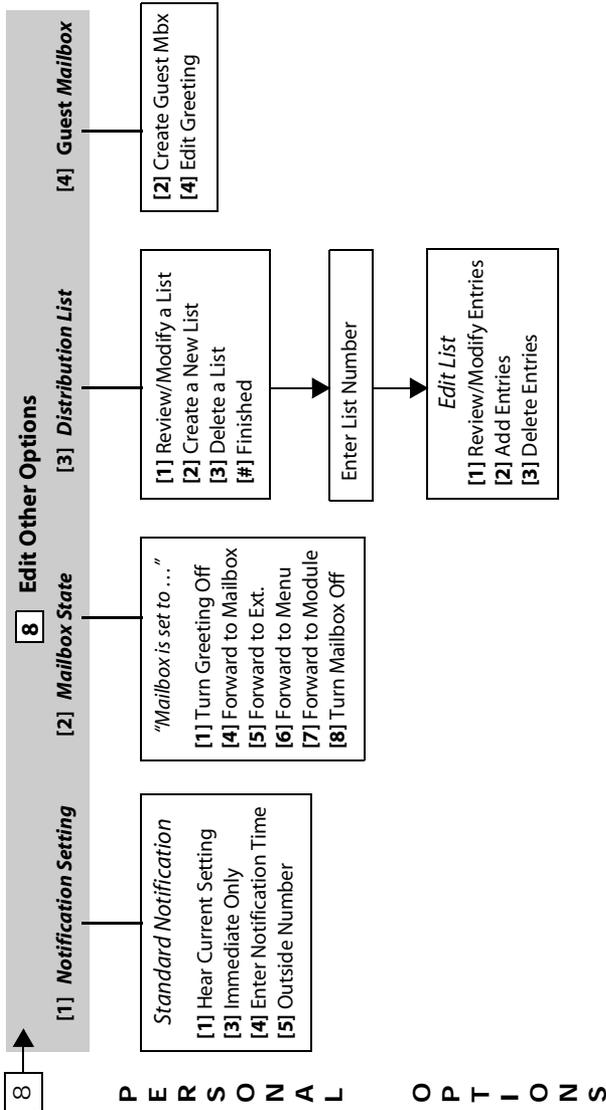
## **Editing Other Options**

1. Log on to *PathFinder* (refer to [“Logging On” on page 3](#)).
2. Press [8] to change personal options.
3. Press [8] to edit Other Options.
4. The following Other Options can be changed:
  - [1] = Alter message notification settings (refer to [“Notification Options” on page 33](#))
  - [2] = Change mailbox state (refer to [“Mailbox State” on page 34](#))
  - [3] = Edit personal lists (refer to [“Personal Distribution Lists” on page 35](#))
  - [4] = Administer guest mailboxes (refer to [“Guest Mailboxes” on page 36](#)).

At the *PathFinder* main menu, press [8] to hear the various Personal Options available.

*Personal Options [8]*

**To Access Other Personal Options** -- Press [8] at the *PathFinder* main menu to hear the Other Personal Options available.



## Notification Options

Message notification instructs *PathFinder* how and where to contact you when a new message is received. This can include sending notification by dialing an alternate telephone number or by activating a paging device.

If you are unavailable, *PathFinder* will periodically redial the notification number until you receive the message. This number can be an internal extension, outside phone number, or digital pager.



*You can access your messages manually at any time. However, you may want to activate Notification if you are expecting an important message or plan to be out of the office at an unusual time.*

### **To Change Message Notification:**

1. Log on to *PathFinder* (refer to “[Logging On](#)” on page 3).
2. Press [8] to change personal options.
3. Press [8] to edit Other Options.
4. Press [1] to change Notification.
5. Select from these options when altering message notification:

[1] = Listen to the current mailbox settings	Tells you what the current notification settings are.
[2] = Turn notification off	Disables this feature. <i>PathFinder</i> does not notify you of new messages. Only available if notification previously has been activated.
[3] = Immediately notify of new messages	<i>PathFinder</i> notifies you immediately of new messages. Only available if notification has been turned off.
[4] = Enter a specific notification time	Sets a time at which <i>PathFinder</i> notifies you of new messages.
[5] = Set notification to an outside number	Sets the number where <i>PathFinder</i> can attempt to reach you to deliver messages.



*Do not set the notification number to your own extension number! Otherwise, PathFinder may leave countless messages in your mailbox telling you that you have new messages.*

## Mailbox State

The mailbox state determines how *PathFinder* processes a call when someone tries to leave a message. Typically, *PathFinder* plays your personal greeting and prompts the caller to leave a message. However, several other options allow the call to be processed in different ways.

### **To Change a Mailbox State:**

1. Log on to *PathFinder* (refer to "[Logging On](#)" on page 3).
2. Press [8] to change personal options.
3. Press [8] to edit Other Options.
4. Press [2] to change the mailbox state.
5. Choose from these options when changing your mailbox state:

[1] = Turn greeting off	Takes a message without playing a mailbox greeting. This is available only if greeting is currently turned on.
[2] = Turn greeting on	Plays mailbox greeting before taking a message. This is available only if greeting is currently turned off.
[3] = Take messages in the mailbox	Cancel any forwarding options and begin recording messages in the mailbox.
[4] = Forward to a mailbox	Transfers the call to a mailbox (not an extension) other than your own.
[5] = Forward to an extension	Transfers the call to another person's extension instead of leaving a message in your mailbox.
[6] = Forward to a menu	Transfers the caller to a custom-designed menu. Contact your System Administrator about forwarding calls to a menu.
[7] = Forward to a module	Transfers the caller to a specific module. Contact your System Administrator about forwarding calls to a module.
[8] = Turn mailbox off	Disables the mailbox. Caller hears: "This mailbox is not available. Press [1] to try another mailbox or [0] for an operator."

## Personal Distribution Lists

*PathFinder* provides the ability to automatically send a message to more than one person through the use of distribution lists. *PathFinder* recognizes two kinds of distribution lists:

**System Lists** -- are created and administered by your System Administrator. You as a mailbox owner can use these lists, but you cannot create or modify them. Typically, system lists are created for groups of people, such as a company department, where more than one person will use the list to reach the entire group.

Check with your System Administrator to find out what system lists are available or to request that a system list be created.

**Personal Lists** -- are similar to system lists, differing only in that they are created and maintained by individual users.

### Guidelines

- » Each mailbox owner can have up to 10 personal lists. List numbers correspond to the keys on the telephone keypad ... [0] through [9].
- » Each personal lists may contain up to twenty-five mailboxes and/or outside numbers.
- » Messages are recorded and sent like any other message and may have delivery options such as confidential, priority, and the like.

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*Personal Options [8]***To Set Up a Personal List:**

1. Log on to *PathFinder* (refer to “[Logging On](#)” on page 3).
2. Press [8] to change Personal Options.
3. Press [8] to edit Other Options.
4. Press [3] to edit Personal Lists.
5. These options are available when editing personal lists:
  - [1] = Review or modify a list
  - [2] = Create a new list
  - [3] = Delete a list

*If reviewing or modifying a list ...* enter the list number that you want to edit, then select from the following edit options:

- [1] = Hear entries
- [2] = Add a new entry
- [3] = Delete an entry

## Guest Mailboxes

Guest mailboxes can be created for individuals who do not have their own permanent *PathFinder* mailbox. Guest mailboxes are especially useful for customers, vendors, or others with whom there is frequent communication. Guests can receive messages from the person who has created the mailbox and can send a reply.

**Guidelines**

- » As a mailbox owner, you can create up to 10 guest mailboxes and leave up to 10 messages for each guest.
- » If an eleventh message is sent, the oldest message in the guest mailbox is automatically deleted.
- » A guest on *PathFinder* can only leave a reply in the guest mailbox if the mailbox owner has left a message for the guest. Otherwise, they leave messages in the standard manner.
- » Guest mailboxes may be deleted if not needed.

### Mailbox Owner Options

Mailbox owners have the following options when working with guest mailboxes:

- Messages may be forwarded to a guest mailbox
- Messages may be replied back to a guest mailbox
- Guest mailboxes may be included in personal lists

The owner's standard mailbox greeting should reflect the availability of any guest mailboxes. A typical greeting might be as follows:

"You've reached Beth Williams. If you think I might have left you a personal message, press [4], then enter the last four digits of your phone number."

(This message assumes that you used the last four digits of a caller's phone number to designate the guest mailbox numbers).

### Record Guest Mailbox Greeting

Managing your guest mailboxes is your responsibility as the mailbox owner. In order to leave messages for guests, you must first record a guest mailbox greeting. Only one greeting is heard for *all* of your guest mailboxes. Once a guest mailbox greeting has been recorded, you can create a guest mailbox.



*You must create a guest mailbox before trying to leave a message in it.*

#### **To Edit a Guest Mailbox:**

1. Log on to *PathFinder* (refer to "[Logging On](#)" on page 3).
2. Press [8] to change Personal Options.
3. Press [8] to edit Other Options.
4. Press [4] to administer Guest Mailboxes.
5. When prompted, select from these guest mailbox options:
  - [1] = List current guest mailboxes & number of messages in each
  - [2] = Create or modify a guest mailbox
  - [3] = Delete a guest mailbox
  - [4] = Edit guest mailbox greeting

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*Personal Options [8]***To Leave a Message:**

1. Log on to your mailbox as you normally would.  
Press [2] to send a message.
2. Record your message, then press [#] when you are finished.
3. When you are satisfied with your message, press [1] to send it.
4. Press [\*] to send to other addresses.
5. Press [4] to send to a guest mailbox.
6. Enter the appropriate guest mailbox number, then press [#].



*There is no verification given after entering the guest mailbox number. Be sure to enter the correct mailbox number.*

**To Retrieve a Message:**

Once a guest mailbox has been created, guests can retrieve messages by calling *PathFinder* and logging on to your mailbox.

1. While listening to the mailbox owner's greeting, the caller presses [4].
2. The caller is prompted for the guest mailbox number. The guest then enters the mailbox number followed by [#].
3. *PathFinder* plays any messages stored in the guest mailbox. If there are messages, the guest can either replay them or send a reply.



*Guests are not allowed to save messages.*

**Access to Guest Mailbox**

A guest cannot send a message from a guest mailbox if there are no messages from the mailbox owner waiting in the guest mailbox.

Access to the guest mailbox is granted only if the mailbox owner has left a message for the guest. Otherwise, *PathFinder* allows the guest to record a message for the owner's mailbox just as it would allow any other caller to record a message.

## *Personal Mailbox Information*

System Access #: \_\_\_\_\_

Mailbox #: \_\_\_\_\_

Initial Password: \_\_\_\_\_

***(Change your password periodically)***

System Administrator's Name: \_\_\_\_\_

System Administrator's Extension: \_\_\_\_\_

System Administrator's Mailbox #: \_\_\_\_\_

<b>Personal Distribution Lists</b>	<b>List #</b>
1 _____	_____
2 _____	_____
3 _____	_____
4 _____	_____
5 _____	_____
6 _____	_____
7 _____	_____
8 _____	_____
9 _____	_____
10 _____	_____





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