6AOSCG0005-29B
July 2012

ADTRAN

Configuration Guide

Configuring the NetVanta 7000 Series Personal Phone Manager

This configuration guide provides assistance in navigating the personal phone manager in the Web-based graphical user interface (GUI) on the NetVanta 7000 Series product. It is assumed that the NetVanta 7000 Series product has been configured as instructed in the *NetVanta 7000 Series Quick Start Guide* and the *NetVanta 7000 Series Hardware Installation Guide* available online at https://supportforums.adtran.com.

This guide covers the following sections:

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Personal Phone Manager Overview

Each user configured on the NetVanta 7000 Series has access to the personal phone manager for their extension. The personal phone manager provides voice users the ability to manage their own directories, user settings, phone settings, call coverage settings, voicemail settings, and FindMe-FollowMe (FMFM) settings. You can also view a list of Special Prefix (SPRE) codes, the status of other users, as well as your own status using the busy lamp field (BLF). Call logs of both received and dialed calls are kept, which provide a method for users to view who has called and when, all through the GUI. The personal phone manager is available to voice users through the GUI and also provides visual voicemail management in addition to click-to-dial for numbers within directories and call logs.

Hardware and Software Requirements and Limitations

The personal phone manager is available to users with ADTRAN Operating System (AOS) products running AOS firmware 15 or later. Some features (such as FMFM) are not available in all firmware versions. To confirm firmware and feature availability on your AOS platform, refer to the *AOS Feature Matrix* available online at https://supportforums.adtran.com.

Accessing the Personal Phone Manager

Each user of the NetVanta 7000 Series product has access to their account using the personal phone manager through the GUI. The GUI is an online configuration tool that allows you to easily configure and view the main settings, as well as the status of your account.

To access the personal phone manager, follow these steps:

1. Open your Internet browser. In the **Address** field, enter the IP address or domain naming system (DNS) name of the NetVanta product. The default address for the NetVanta 7000 Series is **10.10.10.1**.

> NOTE *If you do not know the IP address or DNS name of your NetVanta product, contact your system administrator for assistance.*

2. Enter your extension and voicemail PIN at the prompt. Then select **Log In** to connect. The default voicemail PIN is **1234**.

Viewing and Modifying Account Settings

You can navigate through the personal phone manager using the tabs at the top of the GUI. There are a number of menus that provide details about your account and also allow for modifications. These menus are explained in the following sections.

Home Menu

Once you have accessed the personal phone manager, the first menu displayed is the **Home** menu. From this menu, you can view a list of all SPRE code commands. This list does not indicate whether or not the SPRE code is available to this station.

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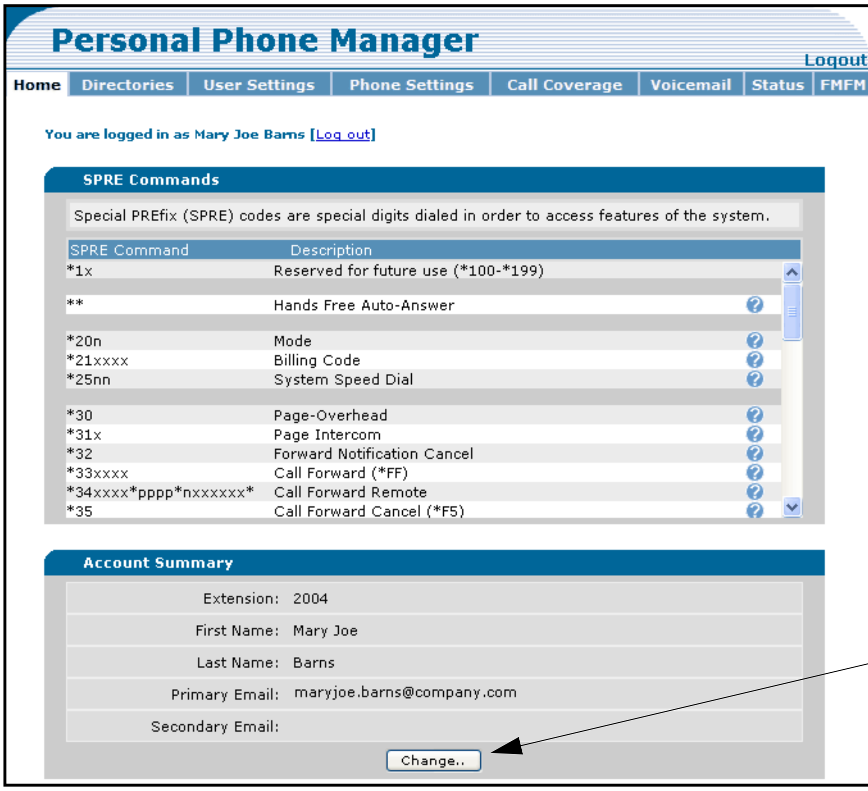
A summary of your account is provided in the lower portion of the **Home** menu. You can change these settings by selecting **Change**, which will redirect you to the **User Settings** menu. Refer to *User Settings Menu on page 5* for more information on making changes to these parameters.

> **NOTE** *While navigating the GUI you will notice question mark symbols that indicate additional information is available. Simply place your cursor over the symbol to view the additional information.*



Select **Change** to make changes to your account under the **User Settings** menu.

Directories Menu

The **Directories** menu displays entries in the **User Directory**, **Speed Dial**, **Caller ID List**, and **Dialed Number List**. It also allows you to dial a number directly from any of these lists. Speed dial entries can be added from this menu as well.

The **User Directory** tab lists all the users on the system and their extension, providing the directory-include option has been enabled by the administrator. The list can be sorted by last name, first name, or number by selecting the column heading. The directory entries are controlled by the NetVanta product administrator. A call to any contact in this directory can be initiated by selecting the **Dial** button next to their name. The contact's extension is then dialed from your phone. The **User Directory** menu also allows you to search for names or extensions by entering the search string in the **Find** field. Results are immediately displayed on the menu. All entries can be displayed by selecting **Show All** or erasing the search string.

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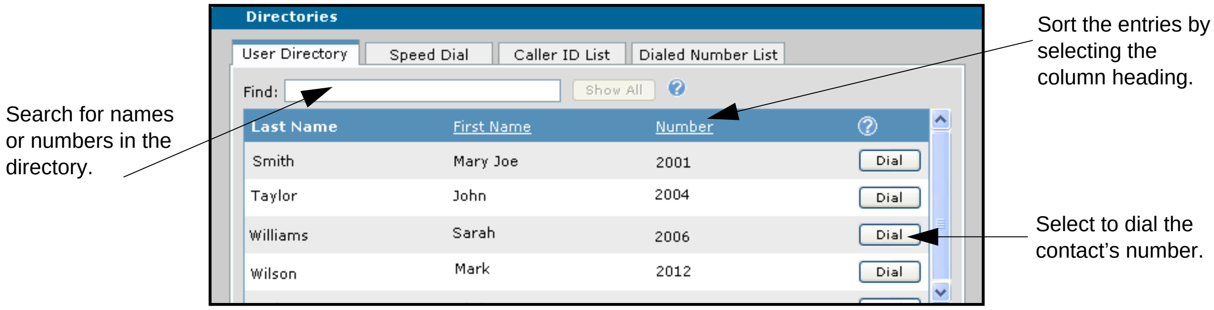
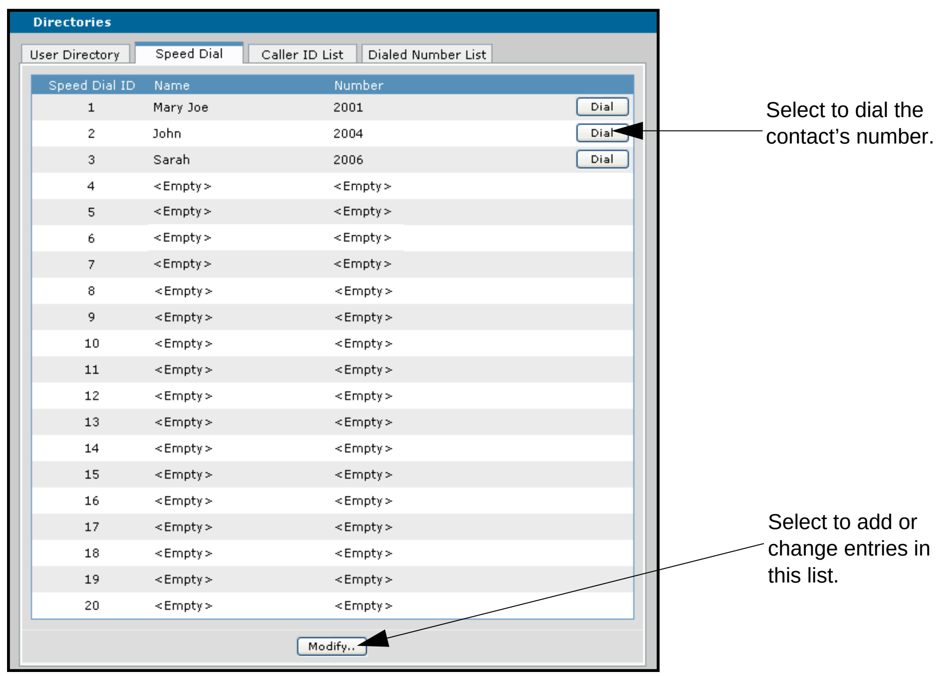
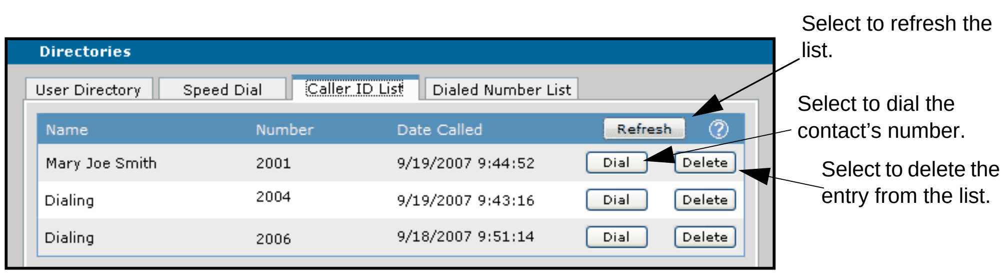


The **Speed Dial** tab lists speed dial entries and allows you to quickly modify your entries. A call to any contact in this directory can be initiated by selecting **Dial** next to their name. Modifications to this list are completed by selecting **Modify** at the bottom of the menu. The **Modify** option is only available if the program user speed dial has been enabled in the class of service by the administrator. The menu changes so that existing entries can be modified and new entries added. An entry can be removed by selecting **Clear** next to the contact. Select **Apply** to save the changes.



The **Caller ID List** tab provides a history of incoming calls by displaying the caller's name, number, and the date/time of the call. A call to any contact in this list can be initiated by selecting **Dial** next to their name. Entries in this list can be removed by selecting **Delete**.



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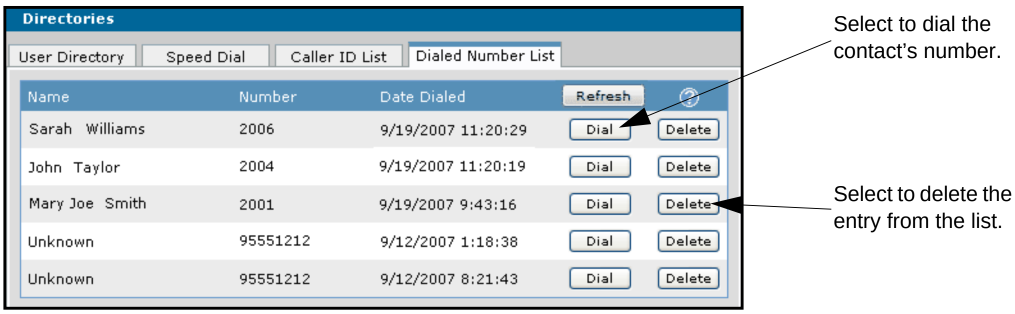
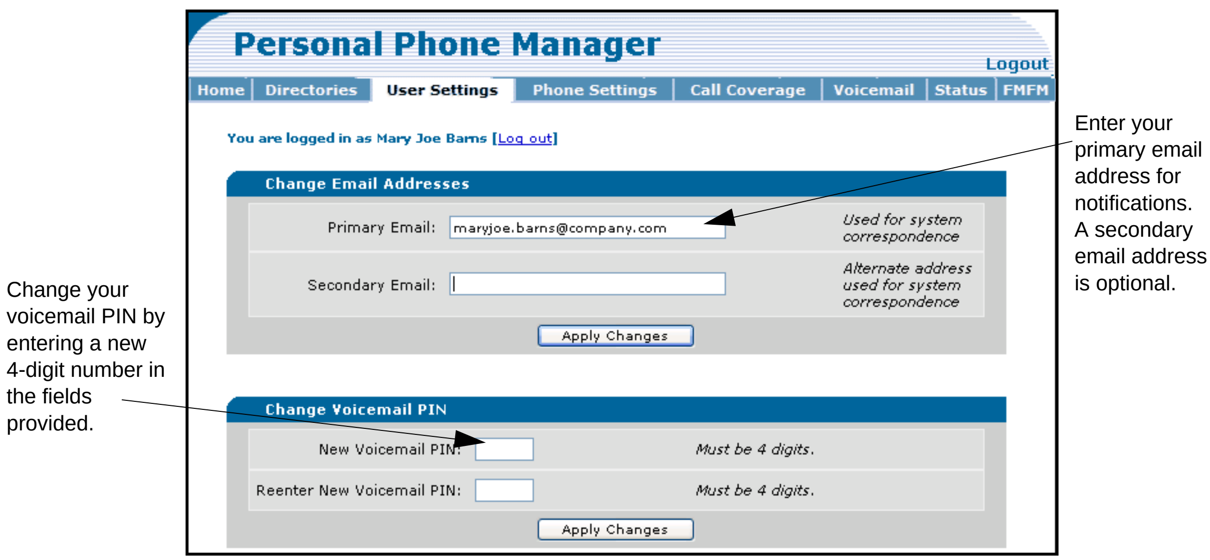
The **Dialed Number List** tab provides a history of outbound calls. A call to any contact in this list can be initiated by selecting **Dial** next to their name. Entries in this list can be removed by selecting **Delete**.

> NOTE
> *The **Caller ID List** and the **Dialed Number List** are not displayed in real time. To view the most up-to-date list, select the **Refresh** button.*



User Settings Menu

Using the **User Settings** menu you can specify primary and secondary email addresses for system correspondence, as well as change your voicemail PIN. Select **Apply Changes** to save the settings.



Phone Settings Menu

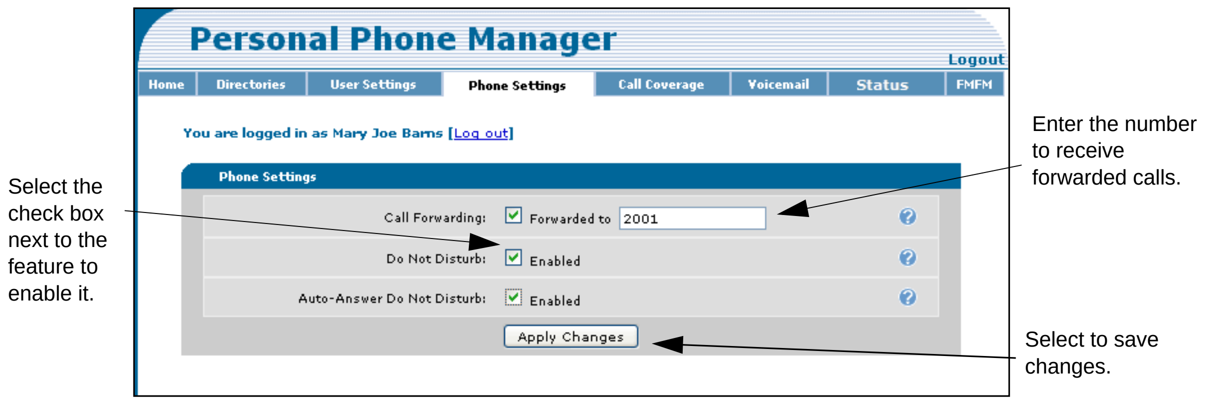
Using the **Phone Settings** menu you can enable **Call Forwarding**, **Do Not Disturb** (DND), and **Auto-Answer Do Not Disturb**. To enable **Call Forwarding**, select the check box next to the option and specify a phone number. Be sure to precede external numbers with a 9 if this is appropriate for your system.

To enable **Do Not Disturb** for your line, select the check box next to this option. When DND is enabled, all calls go directly to your call coverage list instead of ringing the extension. Refer to *Call Coverage Menu on page 6* for more information on customizing your call coverage.

To enable **Auto-Answer Do Not Disturb**, select the check box next to this option. Once enabled, only auto-answer calls are ignored and go directly to your call coverage list. All other calls are allowed to ring your extension.

Select **Apply Changes** to save these settings.

> NOTE
>
> *Selecting* **Call Forwarding** *and* **Do Not Disturb** *from the GUI will enable these features at the system level and will not be reflected on the phone display. Enabling features at the system level takes precedence over the same settings at the phone level.* **Call Forwarding** *can only be enabled on the phone if the system administrator has allowed external call forwarding.*



Call Coverage Menu

The **Call Coverage** menu allows you to specify coverage for your incoming calls. In this menu you can enable FindMe-FollowMe, specify the actions taken for your incoming calls (when unanswered), the number of times your extension rings, and specific actions based on a schedule (**Night**, **Lunch**, **Weekend**, **Custom**, or **Override**). The following section describes the call coverage configuration settings.

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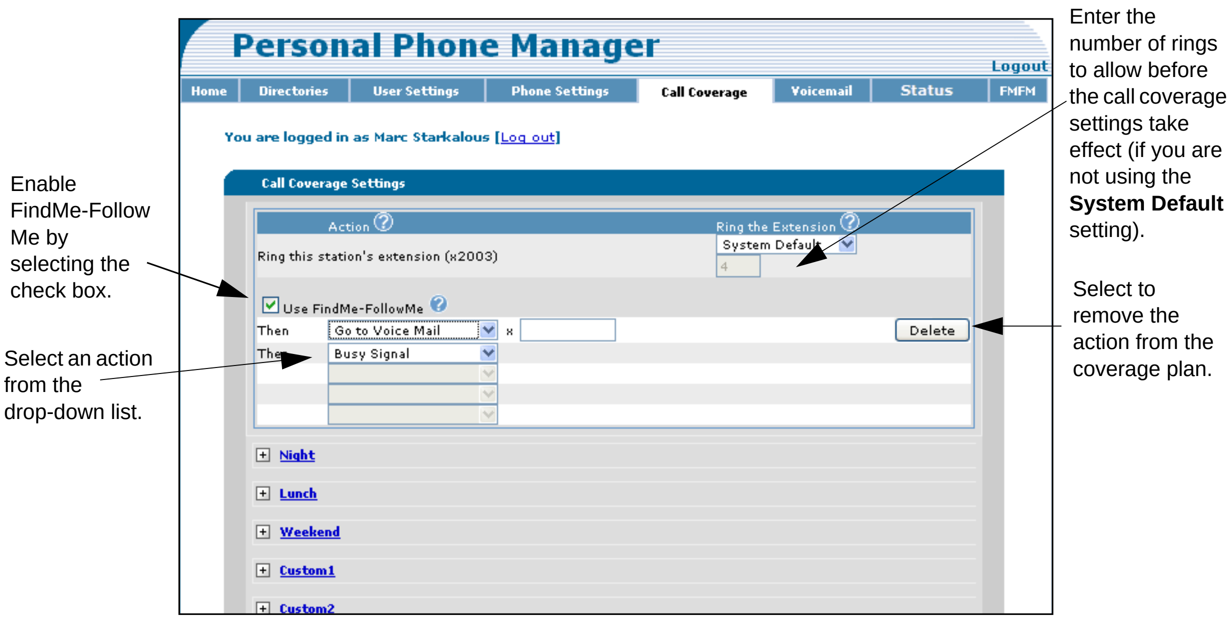


1. If you want to use the FindMe-FollowMe feature, select the check box next to **Use FindMe-FollowMe**. FindMe-FollowMe directs calls based on who is calling. When the feature is enabled and configured (as described in *FMFM Menu on page 14*), an incoming call rings your extension and then is directed based on the FindMe-FollowMe configuration. If FindMe-FollowMe is enabled, those settings take precedence over call coverage settings.

> NOTE
>
> *To use FindMe-FollowMe, the feature must be enabled by the system administrator on your user account.*

2. The **Action** items are evaluated in the order selected. You can choose from the following **Action** items:

   Busy Signal sends a busy signal to the calling party after ringing the extension. In addition, the busy signal selection, when specified only in a **Night** schedule, indicates that no coverage has been set and the default settings are used.

   Go to Auto Attendant routes the calling party to the auto attendant. A list box will appear to the right of this selection that lists the available auto attendants.

   Go to Voicemail routes the calling party to voicemail. If no mailbox is specified, the call goes directly to the voice mailbox of the user account being configured.

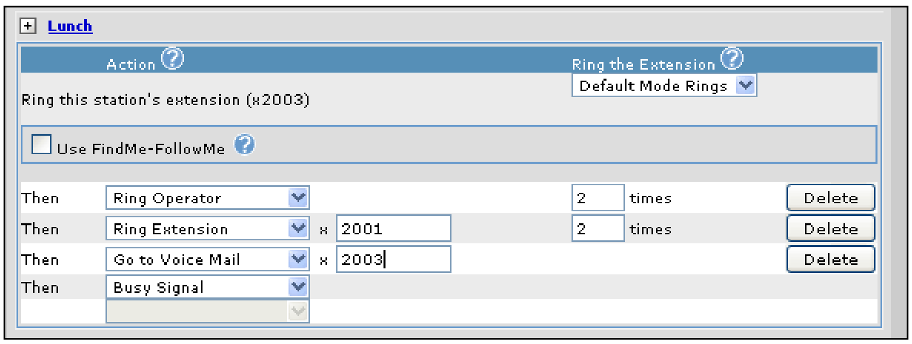
   Ring Extension rings the extension of your choice. Enter the extension in the text box that appears to the right of this selection. Specify the number of times to ring the extension in the field under **Ring the Extension**.

   Ring Operator rings the operator. Specify the number of times to ring the operator in the field under **Ring the Extension**.

   Ring External Number rings the external number of your choice. Enter the external number in the text box that appears to the right of this selection.

3. Specify the number of times to ring before moving on to the next **Action** item using the **Ring the Extension** option. If there is no response after the specified number of rings (or the extension is busy), the next action in the call coverage list will be attempted. If a value of **0** is used, the call coverage list will only be processed if the station is busy. Otherwise, the phone will ring indefinitely. By default, your extension rings **4** times (**System Default** setting). To change the number of rings, select **This Many Times** from the drop-down menu and enter the number of rings in the appropriate field. Selecting **Never** from the drop-down menu indicates that the extension will not ring, but the first coverage item is attempted.
4. Specify a call coverage schedule. These schedules are used to list call coverage actions taken during a specific time based on the system mode schedule. You can create several different call schedules, including **Night**, **Lunch**, **Weekend**, **Custom1**, **Custom2**, **Custom3**, and **Override**. Each of these lists are configured by specifying an action (for example, **Ring Operator**), which are attempted in the order in which they are entered, and specifying the number of rings before the action takes place. Actions are specified using the drop-down menu, and the number of rings is specified by entering a value in the appropriate field.

   For example, in the following illustration a **Lunch** call coverage list is configured that specifies after **4** rings (the default setting) the call is sent back to the operator, after **2** rings at the operator, the call returns to ring extension **2001** twice, and then is sent to the voicemail extension **2003** if there is still no answer. Once the call has gone to voicemail, if the caller is still on the line, the call goes to a **Busy Signal**.

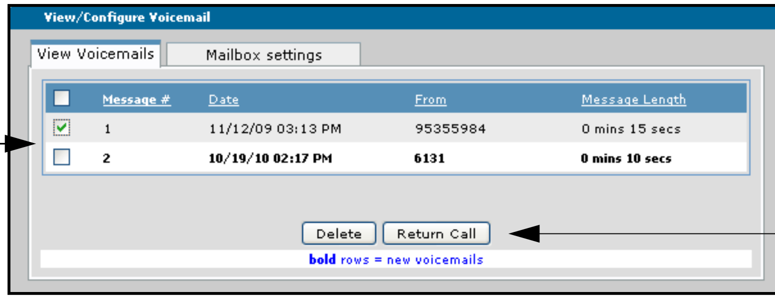


5. Select **Apply Changes** to apply the call coverage settings.

Voicemail Menu

The **Voicemail** menu displays details about your voicemail messages and allows you to customize your mailbox settings. The **View Voicemails** tab shows the date, time, originator, and the message length for all current voicemail messages. A return call can be initiated from this menu by selecting **Return Call** next to the caller’s extension.

Select the check box and select **Delete** to delete voicemail messages.



Select the check box and select **Return Call** to dial contact's number.

The **Mailbox settings** tab allows you to specify email addresses for notification, message playback settings, and set up a notification schedule.

Step 1. Confirm Email Addresses/Message playback settings

1. Specify a **Primary Email** and an optional **Secondary Email** address for notification when new voicemail messages are received. If no email address is specified, notification will not be sent.
2. Select **Play Envelopes** to enable playback of the calling party, date, and time information preceding a message.
3. Select **Auto-Play Messages** to enable automatic playback of messages upon logging into voicemail.
4. Select the **Greeting Method**. The **Default** greeting is your recorded name. To record **Standard** and **Alternate** greetings, log into your voicemail via your phone and follow the instructions under the **Greetings** menu.
5. Select the **Language Preference** for voicemail audio prompts and message playback from the drop-down menu. You can select **FrenchCanadian**, **English**, **Irish**, **LatinAm-Spanish**, or **Default**. Choosing the **Default** language indicates voicemail audio prompts will use the configured system language.
6. Select the **Notification Type** for the primary email. It is optional to select a type for the secondary email. **Attach WAV** sends the voicemail message as a WAV file attached to the email notification. **Text only** sends an email message with text description of the voice message. **Do not email** disables email notification.
7. Select the **Email Action** to take when sending a voicemail as an email attachment. You can choose to take no action (**None**) or you can choose to delete the voicemail message once it is sent as an email attachment (**Delete Message**).

> NOTE
>
> *For the **Email Action** option to function, the administrator must have configured email forwarding on the system.*

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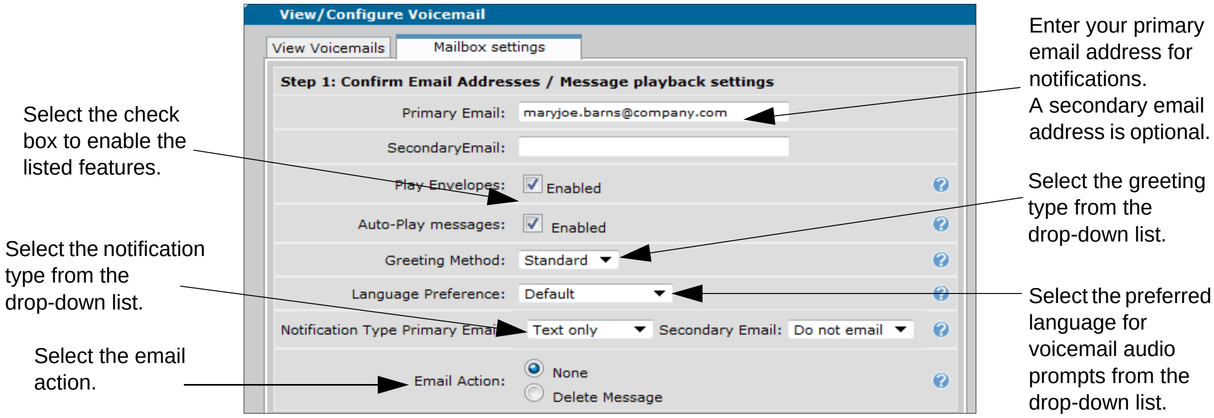
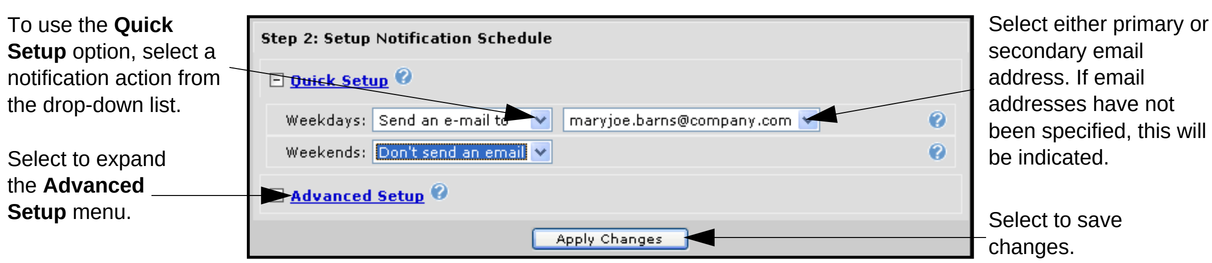


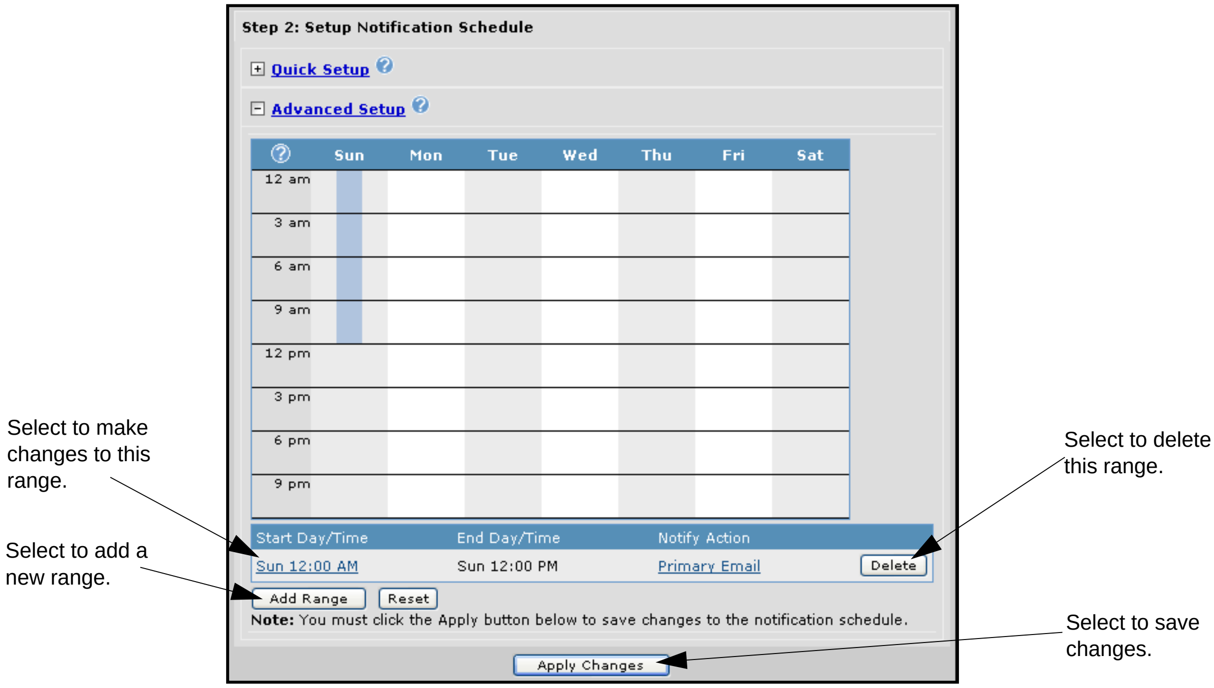
Step 2. Setup Notification Schedule

There are two methods for setting up a notification schedule, **Quick Setup** and **Advanced Setup**. Select **Quick Setup** to set your voicemail to notify your primary or secondary email address upon receiving a voice message during weekdays or weekends. The email addresses must first be specified in Step 1. Select **Advanced Setup** to specify precise schedules for voicemail notification. Schedules appear in both the graphic schedule display and the schedule detail table.

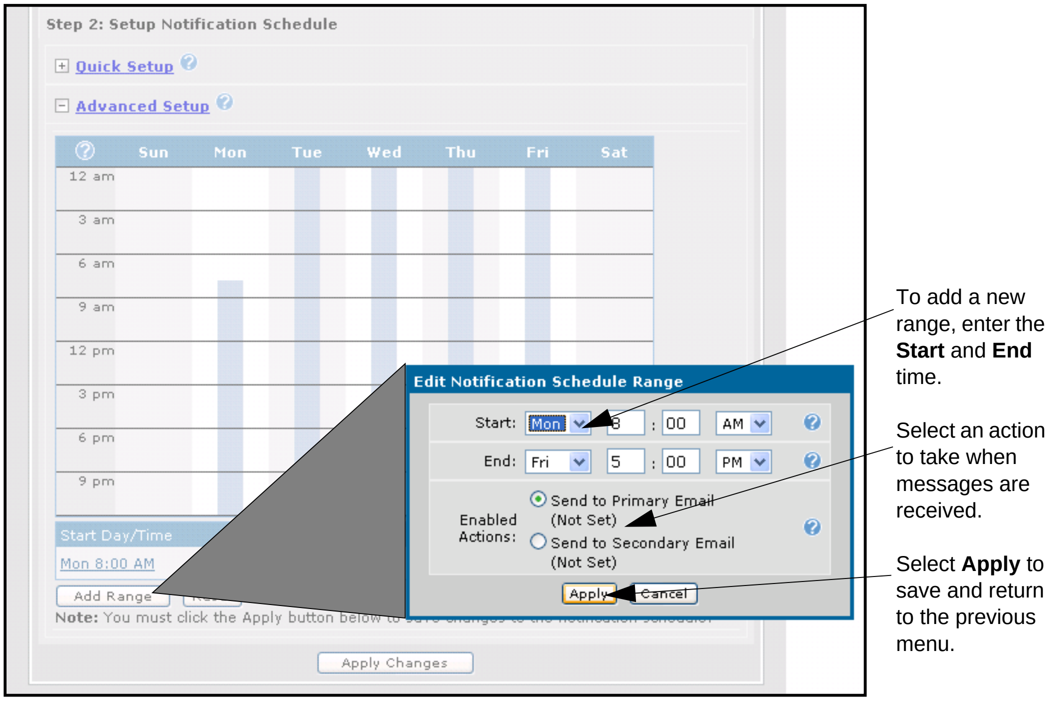


To create a detailed schedule, complete the following steps:

1. Select **Advanced Setup** to expand the graphic schedule and display the options necessary to complete this task.
2. Select **Add Range** below the graphic schedule display.



3. Enter the start and end times for the range. A range is a span of time during the week that will have the same notification type. For example, 8:00 a.m. Monday to 5:00 p.m. Friday.
4. Select to send an email to either the primary or secondary email address during this schedule range (addresses are configured under the **User Settings** menu).
5. Select **Apply** to save the new range.



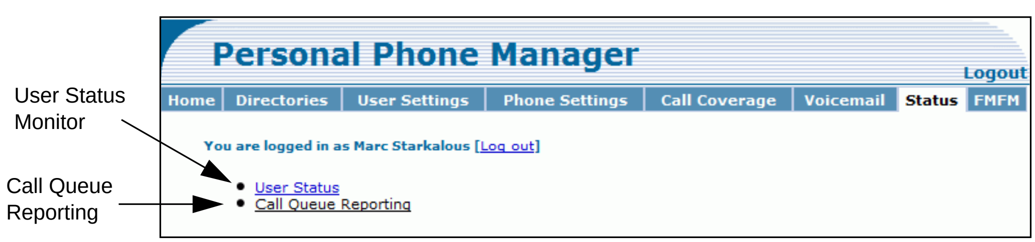
6. Select **Apply Changes** to save settings. (Without this step, your settings will not be retained.)
7. To edit a schedule, select the **Start Day/Time** underlined text link in the detail table (**Mon 8:00 AM** in the previous illustration). To delete an existing schedule, select **Delete** next to the schedule in the detail schedule table.

Helpful Hints:

- Ranges can be added in the middle of an existing schedule to break up the time. For example, to the existing schedule of **8:00 AM** to **5:00 PM** that notifies the primary address, you can add a second range between **12:00 PM** and **1:00 PM** that same day that notifies the secondary email address.
- To create a range that runs through the end of the week, set the **End Day/Time** to be **Sat 11:59 PM** by selecting **Add Range** or selecting the underlined text link below **End Day/Time**.

Status Menu

The **Status** menu allows you to view the status (**Idle**, **Busy**, or **Ringing**) of other system users through the **User Status** monitor**,** or to view calls in the call queue through **Call Queue Reporting**. Users must be added to your status monitor before they can be viewed, and call queue reporting must be enabled by the administrator on your user account before it can be used.



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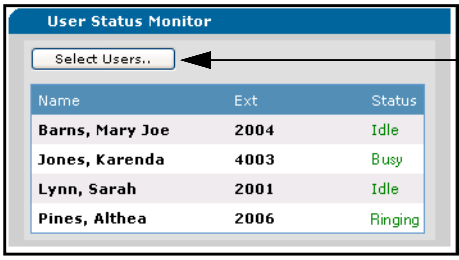
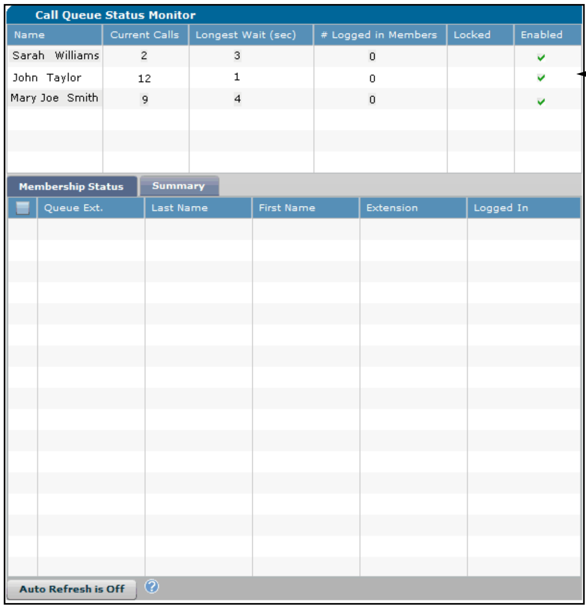
Use the following steps to add users to your **User Status Monitor**:

1. Select **User Status** in the **Status** tab menu.
2. Choose **Select Users**.
3. Select the check box next to the desired user's name on the directory list. You can choose multiple users at one time.
4. Choose **Show Selected Users**. The users you have selected will now appear in your **User Status Monitor** along with the current status of their phone account (**Idle**, **Busy**, or **Ringing**).



If call queue reporting is enabled on your user account, follow these steps to view the call queue:

1. Select **Call Queue Reporting** in the **Status** tab menu.
2. In the **Call Queue Status Monitor** menu, you can view the current calls, wait times, logged in members, and account status for each user. If the users have any logged in members, the status of these members is displayed in the **Membership Status** tab, which displays the member's extension, name, status, and queue extension. To enable automatic updates for this list, select the **Auto Refresh is Off** button to turn on automatic updates. By default, the membership status refreshes every **30** seconds when enabled. If you are a current member of the queue, you can log yourself in or out of the queue.



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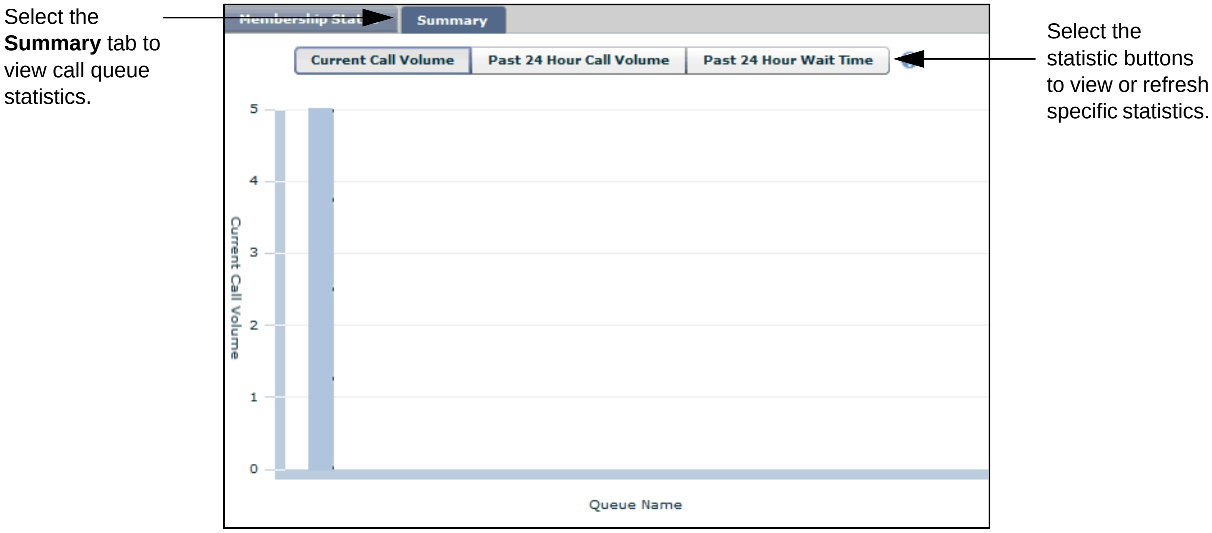
3. In addition, you can view a summarized graphical image of the call queue by selecting the **Summary** tab. When selected, this tab can display the **Current Call Volume**, **Past 24 Hour Call Volume**, or **Past 24 Hour Wait Time** for the call queue. You can select each of these buttons to refresh the statistics.



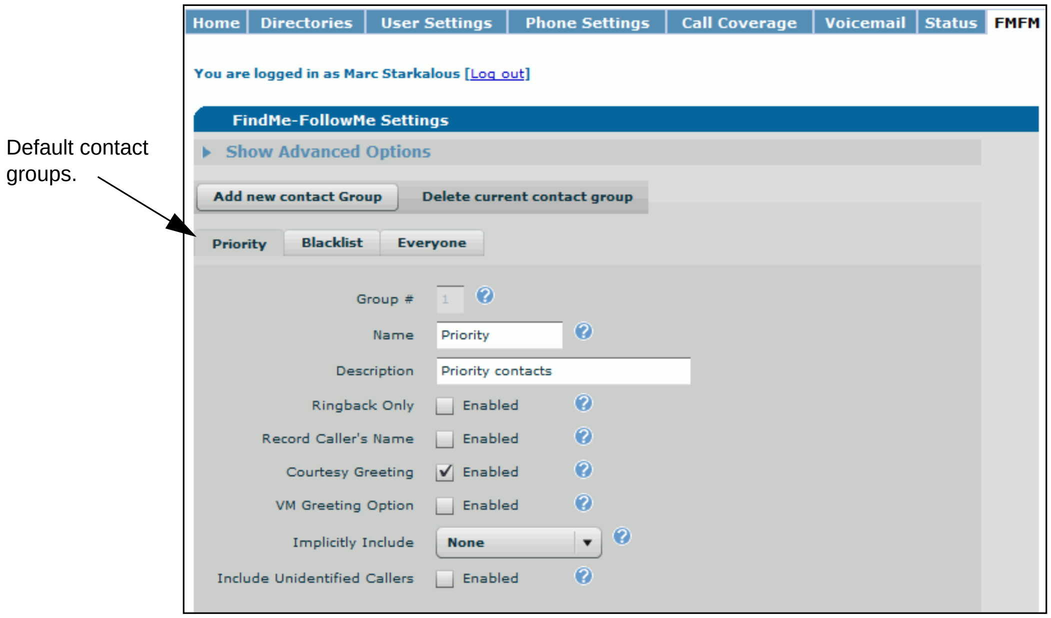
FMFM Menu

The **FMFM** menu allows you to configure your FindMe-FollowMe settings. FindMe-FollowMe is a feature supported by AOS that directs calls based on who is calling. When the FindMe-FollowMe feature is enabled and configured, an incoming call rings the called party's extension and then is directed based on the configuration of the FindMe-FollowMe feature. In a typical scenario, an incoming call is routed to FindMe-FollowMe. The call is first sent to the user's phone. If the user does not answer, the call is then sent to the user's cell phone. If configured, the caller is required to record their name. If the called party answers, they have the option to accept or reject the call. If the called party does not answer, or rejects the call, the call is then sent to the user's voicemail. In AOS, up to four simultaneous calls can be generated for the caller to find the called party.

> NOTE
> *To use FindMe-FollowMe, the feature must be enabled by the system administrator on your user account.*

Configuring FindMe-FollowMe revolves around two main actions: configuring the user's contact groups, and configuring the actions used to determine which numbers are dialed in the FindMe-FollowMe call sequence. Contact groups are the groups of callers from whom the user anticipates receiving calls. For example, a user might have a contact group for family and one for business partners.

By default, AOS creates a **Priority** group, a **Blacklist** group, and an **Everyone** group. Groups can be added or removed at any time, and each user can have **5** contact groups. In addition, contact groups can be configured to play a courtesy greeting, prompt the caller for their name, and provide ringback or hold music to the inbound caller.



The second part of configuring FindMe-FollowMe is to specify the actions taken when an incoming call is received. The actions include: calling an internal extension, calling an external number, referring the call to another number, forwarding the call to voicemail, or sending an email to the called party's primary or secondary email address. Each contact group can have up to **10** actions, and each action can place up to **4** simultaneous calls. In the GUI, the actions are specified at the bottom of the **FMFM** menu.

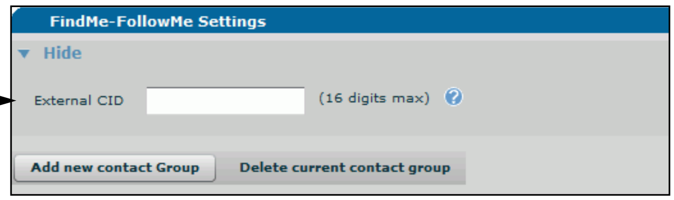
When configuring FindMe-FollowMe, you will create a contact group, enable the group's parameters, and add the group members. Then you will configure the FindMe-FollowMe actions executed when a member of the contact group calls. To configure FindMe-FollowMe, follow these steps:

1. Verify that FindMe-FollowMe is enabled for the desired system mode (refer to *Call Coverage Menu on page 6*).
2. Next, decide if you will use caller ID override for FindMe-FollowMe calls. This feature allows you to specify the inbound caller ID and name when external FindMe-FollowMe calls are received. Select

Show Advanced Options and enter the external caller ID you want displayed when you receive an external FindMe-FollowMe call (up to **16** digits).

Select **Show Advanced Options** to specify the FMFM caller ID.

Enter up to 16 digits for the caller ID override.



3. Decide if you are going to configure (edit) the default contact groups (**Priority**, **Blacklist**, and **Everyone**) or if you are going to create a new contact group. You can delete the current contact group by selecting **Delete current contact group**.
   - If you are creating a new contact group, select **Add new contact group**. A new group tab will appear in the **FMFM** menu.To configure a new contact group, specify the name of the group in the **Name** field and enter a short description of the group in the **Description** field. For example, you might call the group **Business** and describe the group as **New business contacts**.
   - If you want to edit a previously configured contact group (whether the default group or a newly configured group), you will follow the same steps as if you were configuring a new contact group.
4. Next, you will specify whether ringback only, caller name recording, courtesy greeting, and voicemail greetings are enabled for this contact group by selecting the check box next to the appropriate feature.

> NOTE *Using ringback decreases the AOS unit resources needed for FindMe-FollowMe functionality. If **Ringback Only** is enabled, FindMe-FollowMe actions start immediately causing inbound prompt settings (such as name recording) to be ignored.*

5. Next, specify the types of callers you will implicitly include in the contact group by selecting the appropriate option from the **Implicitly Include** drop-down menu. If you select **None**, no callers are implicitly accepted by the contact group. If you select **Internal Callers** or **External Callers**, then either internal or external callers are implicitly included in the contact group. If you select **Everyone**, then all callers are accepted by the contact group. In addition, you can specify that unknown, private, or

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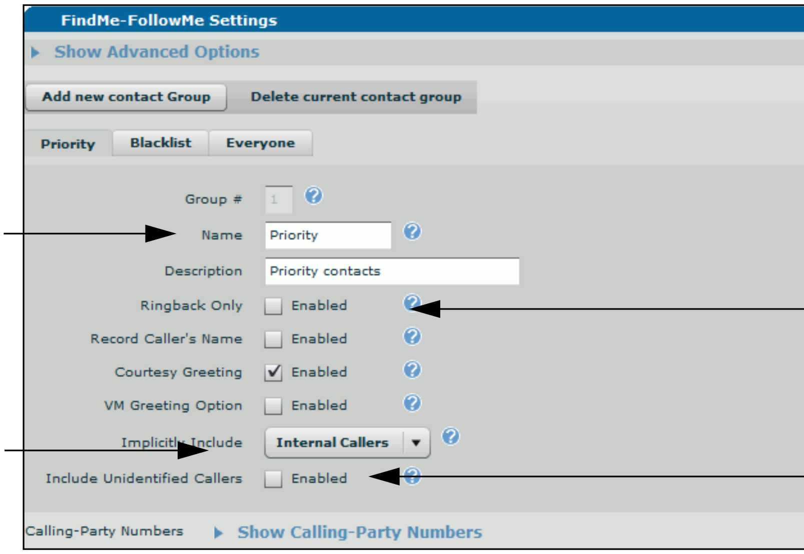
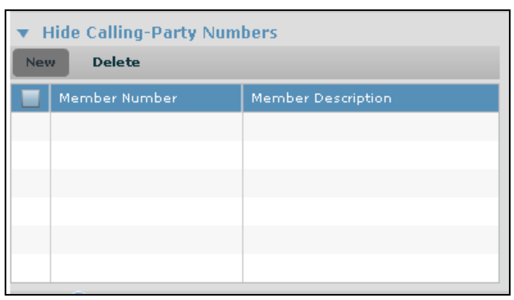
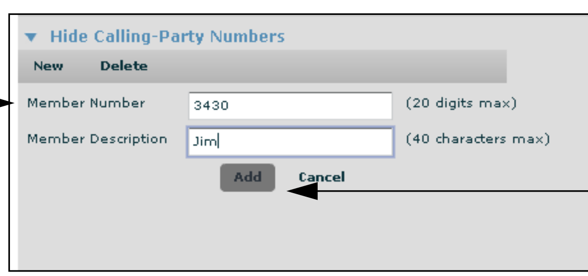
anonymous callers are included in the contact group, or are blacklisted. To include them in the group, select the check box next to **Include Unidentified Callers**. By default, these callers are not included.



6. Once the parameters of the contact group are configured, you can specify certain known numbers to be part of the contact group. These numbers are those individuals you want to include in the contact group that are not covered by the **Implicitly Include** parameter. To add members to the group, select **Show Calling-Party Numbers** and then select **New**.



Next, enter the calling party number and a short description (optional) of the caller in the appropriate fields and select **Add**.



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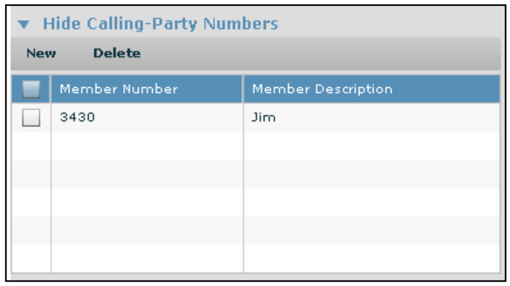
The calling party is now a member of the contact group and appears in the calling party list.



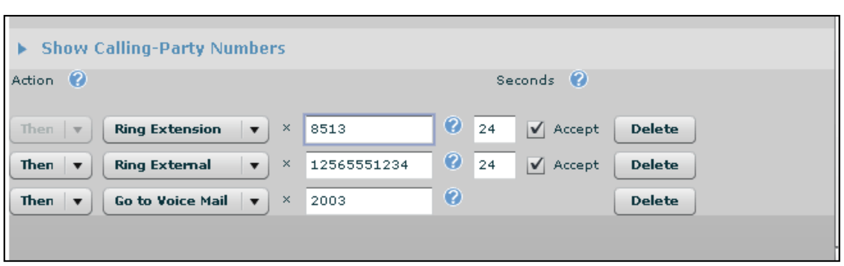
7. Once the contact group is configured, you must specify the actions to take when FindMe-FollowMe is executed. Actions are specified by using the drop-down menus at the bottom of the **FMFM** menu. Each action also includes a timeout period (in seconds) that specifies how long the action is attempted before the call is disconnected. The timeout period range is **1** to **60** seconds. By default, all timeout periods are set to **24** seconds (approximate equivalent of **4** rings). When selecting an action, you can specify that the call go to voicemail, be referred to another number, initiate an email, call an external number, or call an extension. For the **Ring External** action, you should always select the **Accept** check box next to the action (enabled by default). This requires the called party at the external number to press 1 to accept the call, which prevents the call from ending in an external number's voicemail.
You can configure up to **10** actions for a single FindMe-FollowMe contact group. For example, in the following illustration the FindMe-FollowMe actions are to:

- First, ring extension **8513** for **24** seconds.
- Second, if the call is not answered at extension 8513, the call will then ring external number **12565551234** for **24** seconds.

> NOTE *FindMe-FollowMe does not strip the leading **9** for external calls, so do not include it for external calls.*

- Third, if the call is not answered at the external number, the call then goes to voicemail.

> NOTE *If no voice mailbox number is specified, the voicemail will go the user's voice mailbox.*



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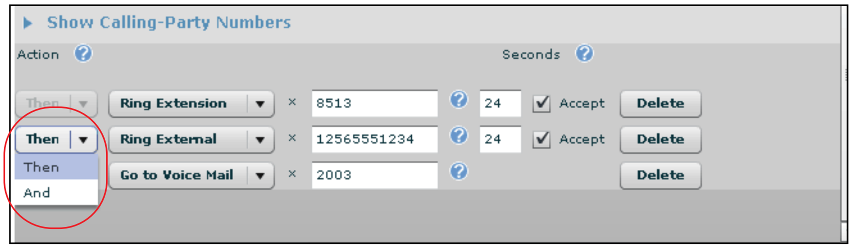
You can also specify these actions to occur in parallel rather than in sequence, meaning the actions are executed simultaneously. To specify actions are executed in parallel, select **And** rather than **Then** from the drop-down menu.



NOTE *If actions are configured to be executed in parallel, and the actions have different expiration times, the next action will not take place until the maximum time for the previous action expires. In addition, not all actions can be executed simultaneously. For example, you cannot send a call to voicemail and ring an external number at the same time.*

8. Once the FindMe-FollowMe actions are specified, select **Apply Changes** to apply the configured FindMe-FollowMe contact group and actions. Repeat these configuration steps for each FindMe-FollowMe contact group (up to **4**).

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