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AICPA Telephone Operations Guide, Spring 1998

American Institute of Certified Public Accountants (AICPA)

AICPA

AICPA Telephone Operations Guide

Spring 1998

Telephone Operations Guide

Quick Reference

Additional Telephone, AUDIX and Video Conferencing Help:

This publication contains all basic instructions for using the AICPA's telephone systems, voice mail system and video conference systems. You may scan the table of contents for the subject that you need information about. For additional help, please call the AICPA Telecom Helpline at ext. 3800.

Providing World-Class Service

By Barry Melancon

The AICPA is a voluntary professional member service association. This means that members have the option as to whether they continue their membership or not. Members judge us, in every contact they make with us, by the service we provide.
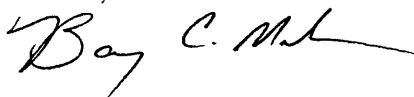
This new AICPA Telephone Operations Guide is provided to you to enable Team AICPA to provide world-class service. When we meet this objective, we will meet both any member service and public service committee needs. In today's technology-driven, global economy, members or customers can do business with virtually any service provider they wish, regardless of the provider's size or location. The key element that separates the "winners" from the "losers" is service quality and customer/member satisfaction. The term used to describe the very highest service quality is "world-class". Those organizations that provide world-class service will be the major "winners" in their fields for many years to come. World-class positions the AICPA to achieve premier status.

It is my view that in order to provide world-class service, you must put yourself in the member's shoes. Think about how you react when you answer the phone, have someone answer who transfers you, or go immediately to voice mail. What is your impression of such an organization?

For Team AICPA to provide world-class service, we must do everything possible to answer every phone call as quickly and as cordially as possible. As soon as we answer the call, we must inherit the call—doing everything in our power to knowledgeably, efficiently and accurately meet the caller's needs. As part of our efforts to be world-class, we are providing you with training (regarding the AICPA, the profession, and good customer service skills) and technological support (with an integrated database system and InTRAnet).

You must make your own commitment. Think of yourself as the caller when you hear an AICPA phone ring. Pick it up, and follow the advice provided in this valuable AICPA Telephone Operations Guide.

Sincerely,

Barry C. Melancon

Contents

2   AUDIX Voice Mail

3 Video Teleconferencing Information

Making and Answering Calls

Introduction

This section of the guide assists users in making and answering calls on voice telephones. All telephone features available on the system are described in this section. To use this section of the guide:

1. Determine which type of telephone set you are using by comparing the diagrams on the next several pages with your phone.

2. Turn to the section of this chapter that deals with the operation you need to perform (i.e., Answering Calls, Getting Messages, etc.)

3. Start at the beginning of the section to find out the basics. Then scan through the titles to get information and instructions on using the most relevant features.

If you are using either a Polycom Conference phone or a '2500' wall phone, see the page describing the telephone set for instructions on using these phones' features.
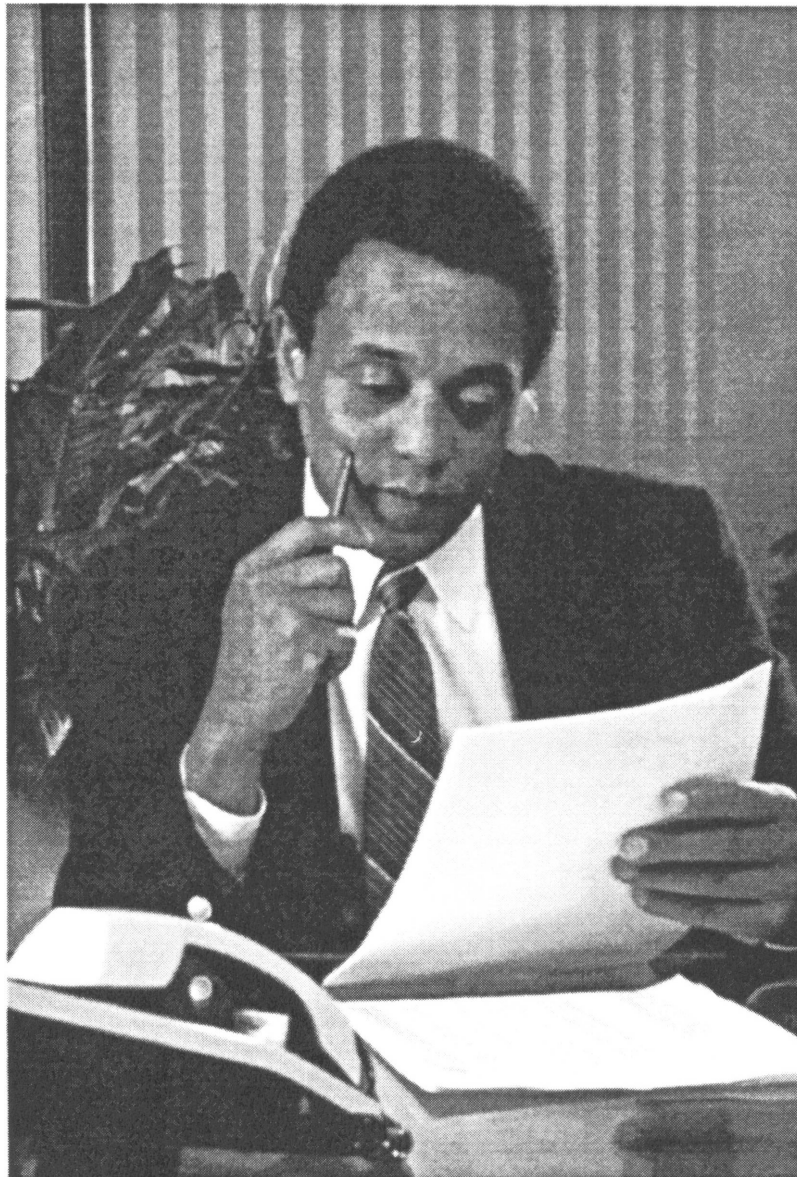
Telephone Sets

The type of telephone set on your desk was selected as the best phone to fit your specific job functions. Find your phone type in this section of the book by matching the diagram and feature buttons to the phone on your desk. Refer to the diagram while reading this guide to locate specific features.

7406-R (Regular)

DIGITAL DISPLAY		
■ ■ Extension	■ ■ Call Pickup	■ Speaker
■ ■ Extension	■ ■ Dial Intercom	■ Mute
■ ■ Extension	■ ■ Trunk ID / Send Calls	■ Personal List / Normal
■ Message	■ Select	Msg. Retrieval / Next
Conference	Transfer	Program / Return Call
Drop	Hold	Delete Message / AUDIX
1	ABC 2	DEF 3	Auto Callback / Transfer AUDIX
GHI 4	JKL 5	MNO 6	Cancel LWC / Leave Word
PRS 7	TUV 8	WXY 9	System List / Last # Dialed
*	OPER 0	#	Directory / Inspect
			Volume

Besides the model type, your set's feature buttons have been specially programmed with the features that will best help you save time and make using your phone easier. If a feature is only used on certain types of sets, the set types are indicated next to the title of the feature.

Note: In some cases, telephone set feature buttons will not match the diagrams shown here exactly because of special requirements.

7406-M (Team Captain)

DIGITAL DISPLAY

Extension	Privacy	Speaker
Extension	Dial Intercom	Mute
Extension	Trunk ID / Send Calls	Personal List / Normal
Message	Select	Msg. Retrieval / Next
Conference	Transfer	Program / Return Call
Drop	Hold	Delete Message / AUDIX

1	ABC 2	DEF 3	Auto Callback / Transfer AUDIX
GHI 4	JKL 5	MNO 6	Cancel LWC / Leave Word
PRS 7	TUV 8	WXY 9	System List / Last # Dialed
*	OPER 0	#	Directory / Inspect
			Volume

7407-M (Team Captain)

DIGITAL DISPLAY					
■ Extn	■	Conference	Transfer	Ring Off	Call PU
■ Extn	■	Drop	Hold	Trunk ID	AD
■ Extn	■				AD
■ Privacy	■	1 / ABC 2 / DEF 3		Program	AD
■ Dial ICM	■ Send Call	GHI 4 / JKL 5 / MNO 6		Pers List	AD
				Sys List	AD
■ Directory	■ Timer	PRS 7 / TUV 8 / WXY 9		Trsfr AUD	AD
■ Normal	■ Msg Retvl	* / OPER 0 / #		Auto Cbk	AD
■ Del Msg	■ Next			Cancl LWC	AD
■ Date/Time	■ Ret Call	■ Message	■ Select	Lv Word	AD
■ Inspect	■ Volume	■ Speakerphone	■ Mute	Last #	AUDIX

7407-A (Team Coordinator)

DIGITAL DISPLAY					
■ Extn	■ Bridge 1C	Conference	Transfer	Consult	Call PU
■ Extn	■ Bridge 2A	Drop	Hold	Trunk ID	AD
■ Extn	■ Bridge 2B			Cov Cback	AD
■ Bridge 1A	■ Bridge 2C	1 / ABC 2 / DEF 3		Program	AD
■ Bridge 1B	■ Dial ICM	GHI 4 / JKL 5 / MNO 6		Pers List	AD
				Sys List	AD
■ Directory	■ Send Call	PRS 7 / TUV 8 / WXY 9		Trsfr AUD	AD
■ Normal	■ Msg Retvl	* / OPER 0 / #		Auto Cbk	AD
■ Del Msg	■ Next			Cancl LWC	AD
■ Cvr Msg	■ Ret Call	■ Message	■ Select	Lv Word	Date/Time
■ Inspect	■ Volume	■ Speakerphone	■ Mute	Last #	AUDIX

7444 for ACD Users

DIGITAL DISPLAY					

■ Extn	■ Svc Obsrv	Conference	Transfer	Log In	Assist
■ Extn	■ Q-Calls	Drop	Hold	Log Out	Call PU
■ Extn	■ Q-Time			Available	Event 1
■ Dial ICM	■ Last #	1	ABC 2 / DEF 3	Aux Work	Event 2
■	■ Send Call			ACW	Event 3

Keypad:

1	ABC 2	DEF 3
GHI 4	JKL 5	MNO 6
PRS 7	TUV 8	WXY 9
*	OPER 0	#

■ Directory	■ Timer	Transfr AUD / Event 4
■ Normal	■ Msg Retvl	AUDIX / Event 5
■ Del Msg	■ Next	Trunk ID / Event 6
■ Date/Time	■ Ret Call	Program / Pers List
■ Inspect	■ Volume	Cncl LWC / Sys List

■ Message   ■ Select
■ Speakerphone ■ Mute

Lv Word Call   Release

Callmaster for ACD Users

DIGITAL DISPLAY				

○○ Extension	○○ Extension	○○ Assist 1	○○ Assist 2	○○ Queue Calls
○○ Extension	○○ Trunk ID	○○ Log In	○○ Remote Msg Lite	○○ Queue Time

○○ Conference	○○ Transfer	○○ Log Out	○○ Event 1	○○ Normal
○○ Drop	○○ Hold	○○ Available	○○ Event 2	○○ Message Retrieval
		○○ Aux Work	○○ Event 3	○○ Next Message
		○○ ACW	○○ Event 4	○○ Delete Message
		○○ Audio Trouble	○○ Event 5	○○ Inspect
		○○ Mute	○○ Event 6	○○ Release

Keypad:

1	ABC 2	DEF 3
GHI 4	JKL 5	MNO 6
PRS 7	TUV 8	WXY 9
*	OPER 0	#

○ Message

Polycom Conference System Operation Instructions

The Polycom Conference System Phones are installed in many AICPA conference rooms. These phones allow groups of people in large spaces to be heard on a single call.

To place a call (via the Speakerphone):

- Press the `On/Off` button; (Green Light goes on).

- Listen for dial tone; use dial pad to dial desired telephone number.

To disconnect from a call (via the Speakerphone):

- Press the `On/Off` button; (Green Light goes off).

CONFERENCE (via the Speakerphone):

The Polycom System allows users to set up 3-party conference calls.

To add another party to a 2-party connection:

1. Press the `Flash` button; (current call is put on hold).
2. Dial tone is heard; dial the third party.
3. When third party answers, discuss the purpose of the call; then press the `Flash` button. A 3-party conference is established.
4. To drop the last party added from conference call, press the `Flash` button once.
5. If the third party is busy or does not answer, press the `Flash` button twice.
   - Call to the third party is dropped.
   - Original 2-party call is reestablished.

TRANSFER (via the Speakerphone):

To transfer a call:

1. While still active on the call to be transferred, press the `Flash` button once. (Call is put on hold.)
2. Dial tone is heard; dial the third party.
3. Announce the call to the third party, and hang up. (Party on hold is transferred to third party.)
4. If third party's number is busy or not answered, press the `Flash` button twice to return to the held call.

For additional help, please call the AICPA Telecom Helpline at ext. 3800.

'2500' Wall-Mounted Phone

Some departments have AT&T 2500 wall-mounted telephones installed in a central location for staff use. These phones have many of the features of the larger sets.

HOLD

To put a call on Hold:

1. Flash (press) the switchhook once; (current call is put on hold).
2. Dial tone is heard; an outgoing call can now be dialed.

To return to a call on Hold:

*   Flash (press) the switchhook once.

CONFERENCE

'2500' telephone users can set up 3-party conference calls.

To add another party to a 2-party connection:

1. Flash (press) the switchhook (current call is put on hold).
2. Dial tone is heard; dial third party.
3. When call is answered, discuss the purpose of the call, then flash (press) the switchhook. A 3-party conference is established.
4. If third party is busy or does not answer, flash (press) the switchhook twice.
    *   Call to third party is dropped.
    *   Original 2-party call is reestablished.
5. To drop last-party added from conference call, flash (press) the switchhook once.

TRANSFER

To transfer a call:

1. While still active on call to be transferred, flash (press) the switch-hook once. (Call is put on hold.)
2. Dial tone is heard; dial number of third party.
3. Announce the call to the third party and hang up. (Party on hold is transferred to third party.)
4. If third party's number is busy or not answered, flash (press) the switchhook once to return to the held call.

LAST NUMBER DIAL

To redial the last number called:

1. Press [*] [9].
2. Number is automatically dialed.

SYSTEM LIST

To call a number from the system list:

1. Select the desired 3-digit code printed in the system list section of the AICPA telephone directory.
2. Dial 103 and the 3-digit code.
3. Number is automatically dialed.

User Basics

The telephone systems employed at the AICPA represent the most advanced systems of their type available today. These systems provide many easy to use and time saving features to help users work more effectively, and help calls get answered more efficiently. New users should familiarize themselves with this section of the *AICPA Telephone Operations Guide* before answering or making calls.

Call Appearances

Digital telephone users have three appearances of their extension numbers on their sets. These are called Call Appearances and are used as follows:

- Any 2 of the 3 appearances (a, b or c) can be used to receive calls; (i.e., a user can receive 2 incoming calls at any given time).

- All 3 appearances can be used to place calls.

There are two types of lights that appear on the telephone set.

A **Red Light** appears next to the Call Appearance of the extension number. The **Red Light** is always on when the telephone set is not being used. The **Red Light** is normally next to the first call appearance. The Call Appearance is where the user will receive dial tone when the handset is lifted, or where an incoming call will ring.

○ ○	**a** *3001*
○ ○	**b** *3001*
○ ○	**c** *3001*

A **Green Status Light** appears beside or below each Red button light. The **Green Status Light** will change as follows:

- the green light will *go on* when a call appearance is being used;

- the green light will *flutter* when a user places a call on hold;

- the green light will *flash* when an incoming call is ringing on your call appearance button.

Direct Inward Dialing

D.I.D. stands for Direct Inward Dial. Your D.I.D. number allows outside callers to reach you directly by dialing the area code, exchange and your extension. Whenever someone you are speaking with will need to call you back, you should provide them with your D.I.D. number. Your D.I.D. number is located on a label beneath the handset of your phone. Callers who do not know your D.I.D. number must dial the main number where they will be greeted by an automated attendant. The automated attendant will prompt the callers to dial the first (4) letters of the individual's last name followed by the # sign. The callers will then be automatically transferred to the appropriate individual's extension number. If the callers do not know the individual's last name, they will be automatically transferred to an AICPA operator, who will personally assist them.

```
┌─────────────────────────────┐
│                             │
│          Hold               │
│                             │
└─────────────────────────────┘
```

To Place Call on Hold:

1. Press `Hold`
   - Green light flutters

   Note: If you put a conference call on hold, the other parties remain connected.

To answer a new call while active on another

1. Press `Hold`
2. Press `xxxx` of incoming call

To return to held call, press ⌐ **xxxx** ⌐ of held call

Do not put anyone on hold without telling them. Before putting someone on hold, let the person know why, approximately how long you'll be away from the line, and give the person a choice to remain on hold or have you call back with information.

When leaving and returning to the line, here are some situations and responses to follow:

Situation: **You have to leave the line.**

Response: *"I'll have to leave the line for a moment to check our files, Mr. Robbins. Would you mind waiting while I check or shall I call you back?" Periodically update the person waiting at the other end of the line as to the status of their request (e.g., progress is being made on the request or in getting the called person to the telephone).*

Why given: *Since the person cannot see what is going on, the only way he/she has of knowing his/her call is receiving attention is through a progress report. This also provides an opportunity for the waiting person to offer additional information or request a callback.*

When given: *You should give a progress report to the caller approximately every 30 seconds.*

Note: If you anticipate or experience the "hold" situation lasting more than 2 minutes, it is recommended that you ask the caller if he/she would prefer that you take his/her number and call him/her back. You should indicate to the caller how long it will be (e.g., one hour, etc.) for you to get back to him/her

Situation: **You are returning to a call you placed on hold. A return that omits an introductory phrase may make necessary a repetition of the information.**

Response: *Use some attention-getting phrase.*

- *Call member by name, if possible, such as "Miss Doe?"*
- *Use an introductory phrase like, "I have that information now."*

Do not make statements such as:

"Where were we?" or "Mr. Smith?" (when it was Mr. Jones who was placed on hold).

Situation: If there has been an unavoidable delay, it makes sense to apologize.

Response:
- *"I'm sorry to keep you waiting, Miss Robinson."*
- *"Thank you for waiting. I have that information now."*
- *"Mr. Smith will be right with you."*
- *"Here is Mrs. Williams."*
- *"Just a moment please."*

Transfer

When a member calls, he or she often does not know who to contact. Our console operators do their best to route calls to the proper person or department, but the operators are not always able to identify the appropriate person.

Don't transfer the call without announcing it and giving the recipient a brief explanation of what the caller needs; this helps the person respond to the call more effectively.

When you have a member (customer) on the telephone that needs to speak to another AICPA staff member, use the "Conference" feature described in the next section rather than the "Transfer" feature to connect the caller to the staff member.

When you have a member (customer) on the telephone that needs to be connected to one of the AICPA's Member Service groups, use the "Transfer" feature to immediately connect the caller to the appropriate "Group Number" found on Page 3 of the AICPA Telephone Directory. Do *not* use the "Conference" feature in this situation.

To Transfer a Call to Another Extension:

1. Press ⎡Transfer⎤ (you hear dial tone)
   - Current call placed on hold
2. Dial number that call is to be transferred to (you hear ringback tone)
   - Remain on line and announce call
3. Press ⎡Transfer⎤ again
   - Call sent to dialed number
4. If no answer or busy, return to held call by pressing the appropriate fluttering call appearance button.

If you receive a call you cannot handle, please observe the following procedures:

A. *If you are reasonably sure who should handle the call, transfer it to that person. Always advise callers before you attempt the transfer. Tell them the name of the person you're transferring the call to and that person's extension number, in case the call gets disconnected.*

   *If someone other than the person you are transferring the call to answers the phone, ask if the person you are seeking is available. If not, ask the person who answered the phone if he/she can help this person, or take a message from the calling party **before** you complete the transfer.*

   *If you get no answer, or reach voice mail on the dialed extension, get back to the caller and say, "**Mr. Smith is unavailable at the moment.**" Find out if someone else can help, offer to take a message and follow up later (making sure the appropriate party gets the message), or offer to transfer the caller to voice mail.*

B. *If you are **not** reasonably sure who should handle the call:*
   a) *Get as much information as you can about the caller's request.*
   b) *Get the caller's name and telephone number **and give them yours.***
   c) *Tell the caller you will have someone call back.*

Talk to your immediate supervisor, manager or director to determine who should handle the call. If he or she does not know who should deal with the call, immediately contact the Member Services Help Desk. They have been assigned responsibility for handling such questions.

In most cases, the call should be returned the same day it was received. The worst-case response time should be within 24 hours of the original call.

Conference

Allows you to add parties to a call so that you can conduct up to a 6-way conversation.
(Call the AICPA Telcom Helpline at ext. 3800 for instructions on how to place conference calls with more than 6 participants.)

1. Place call to first party.
2. Press ⎡Conference⎤ button. (This puts the current party on hold, and you are given dial tone on a new call appearance.)
3. Dial number of party to be added and wait for answer.
   Note: You can privately discuss the call with the new party at this time; if no answer or busy, press fluttering appearance of your extension to return to the held call.
4. Press ⎡Conference⎤ again to connect all (3) parties.
5. Repeat Steps 2 through 4 for additional connections.

Drop

The ⎡Drop⎤ button disconnects the last call added to a conference call.

Note: Parties other than the last one must hang up to be released from the conference call.

Display Features

Most telephone sets have a digital display to inform you of call and feature status. Among the many features that use the display, the [Normal] button is the most important to know about.

Normal

- The display remains in normal mode until you activate one of the other display features. After using any of these features, return to normal mode by pressing [Normal].
- In some cases incoming calls may temporarily suspend your current display feature. When the call is answered, the original display information returns.

Date/Time   (available on 7407 sets only)
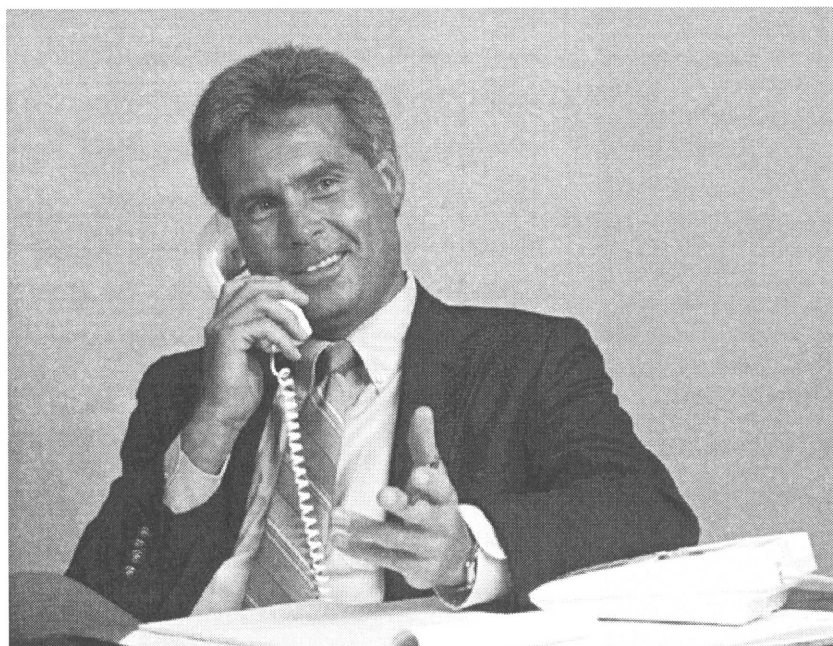
To see correct date and time, press [Date/Time]

Timer   (available on 7407(T. Capt.) sets only)

This is your phone's built-in stopwatch.
Press [Timer] to activate.
Press [Timer] again to deactivate.

Speaker

Many AICPA telephone sets in enclosed offices have a digital speakerphone. To use the speakerphone, simply press the Speaker button. If you are answering a call, you will be immediately connected to the incoming call. If you are making a call, you will hear dial tone. To speak privately with other parties in the room, press the Mute button. To deactivate Mute , simply press the button again.

Use the speakerphone selectively and only with the caller's agreement. Because speakerphones do not work well in noisy environments, telephones in workstation cubicles have their speakerphones disabled.

Reset Spkr

You can adjust the speakerphone to the surrounding room acoustics to provide optimal performance. Use the Reset Speakerphone feature in the following ways:

- Whenever you move your voice terminal to another place (even in the same room)

- Whenever the green light next to Reset Spkr flutters intermittently

To adjust the speakerphone to the surrounding room acoustics with the handset resting on the cradle:

1. Press Select

- Green light next to Select goes on steadily.

2. Press Reset Spkr

- Green light next to Reset Spkr flutters intermittently;

- You will hear a series of tones as the speakerphone performs an acoustic test of the environment.

Note: For information about using Polycom Conference Room speakerphones, see page 1–6.
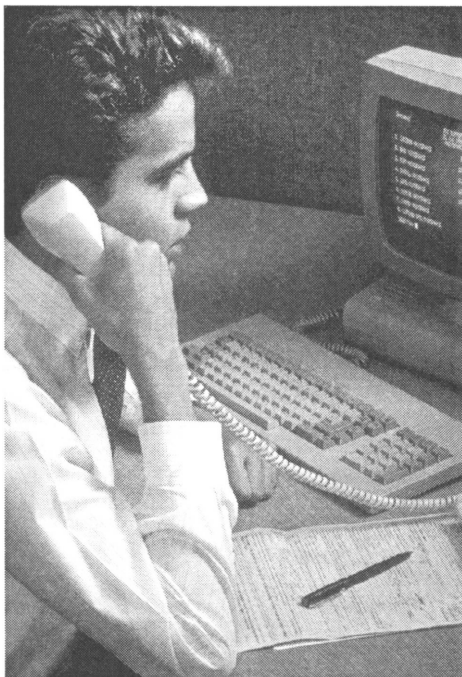
Answering Calls

Since your voice will be the first heard by anyone calling the Institute, your telephone should be answered promptly—on the first ring, if possible. Keep a pad and pencil handy.

To answer a call, lift the handset of a ringing phone and you will be connected to the call. You should *not* answer your phone by using the speakerphone button.

If you are already on the phone with another call, place the first call on hold by pressing the `Hold` button. Then press the ringing Call Appearance button to answer the new call. (A Call Appearance button is any button with your extension number on it and represents one "line" on your phone.)

There are two ways to distinguish which type of call you are receiving—by looking at your display, or by listening to the "ringing cadence" of the call.

The "ringing cadences" are as follows:

* *internal* — one long ring

* *external* — two short rings

Most phones have two incoming lines — if you are unable to answer your phone, the caller will be sent to your designated coverage or Voice Mail.

Answer with your name and/or the name of your department.

For example: "Susan Jones" or "Susan Jones, Personal Financial Planning."

Backup Coverage

Proper telephone coverage means being responsible for your telephone being answered promptly. Never leave your phone(s) unattended. Voice Mail should be used rarely and only when no one in your department is available to answer the phones. Make sure your co-workers know you will be away from your desk and that someone will be able to attend to your phone. Likewise, when covering someone else's phone—make sure you answer promptly and take messages accurately.

Screening Calls

Screening calls is a business procedure that can cause the loss of goodwill and be a source of irritation to the caller if not done properly. AICPA staff members should avoid the practice of screening calls.

Under no circumstances, when screening calls, should statements such as the following be used:

* *"I don't think (s)he's accepting calls."*

* *"(S)He doesn't want to be disturbed."*

* *"I think (s)he went to lunch" (at 11:00 a.m.).*

* *"(S)He hasn't returned from lunch" (at 3:00 p.m.).*

* *"I'm not her/his secretary. I don't know if (s)he's in today."*

* *"I haven't seen him/her today."*

* *"I don't know where (s)he is."*

Select Ring

Allows you to select your own personalized ring from among eight available patterns. Use this feature to distinguish your ring from that of other nearby telephones.

To select the ring, press the ⎡Select⎤ button and the ⎡Conference⎤ button(notice the word "ring" is printed on the ⎡Conference⎤ button). Keep pressing the ⎡Conference⎤ button until the desired ring is achieved. Then press the ⎡Select⎤ button to save the ring you have chosen.

Ringer Off   (available on 7407(T. Capt.) sets only)

On rare occasions (such as an important conference call), you may wish to disable the ringing of your telephone set. To disable the ring, press the ⎡Ringer Off⎤ button. To re-enable the ring, press ⎡Ringer Off⎤ again.

Inspect

To see who's calling while you're already on a call, press ⎡Inspect⎤ and the ringing call appearance button.

Note: New caller information is shown for 30 seconds when call is received; then display returns to normal mode.

> a = Smith, B.   3790

Before you press ⎡Inspect⎤, *your display looks like this.*

> b = Jones, S.   3789

After you press ⎡Inspect⎤, *your display looks like this.*

Call Pickup

Users who work together are often assigned to a call-pickup group. Any member of the group may pick up another member's ringing phone.

To answer a call placed to a member of your group, press ⎡Call Pickup⎤. To pick up a call while you are active on another call

1. Press ⎡Hold⎤ to put first call on hold
2. Press ⎡Call Pickup⎤

a = Jones, C. to Wright, P.   **p**

The display will show who the phone call is from, and you will be immediately connected.

When covering someone else's phone—make sure you answer promptly and take messages accurately and willingly. Refer to previous "Answering Calls" section.

Bridged Appearances

A **Bridged Call Appearance** allows a user to have the extension numbers of another individual appear on their set (e.g., Team Captain's extensions can also appear on the Team Coordinator's set).

With Bridged Call Appearances, a call placed to a Team Captain's set will ring simultaneously on the Team Captain's set and on the Team Coordinator's set.

If someone has a Bridged Appearance button for your extension, they can bridge onto your extension unless the Privacy button is pressed.

Privacy   **(available on 7406(T. Capt.) and 7407(T. Capt.) sets only)**

If your extensions appears on someone else's phone, you may prevent anyone else from listening in on your conversation by pressing the Privacy button.

Send Calls

The Send Calls feature is used as follows:

Anytime you leave your desk, press your Send Calls button. By doing so, *your callers* will reach your Coverage Path more quickly, instead of wasting unnecessary "ringing time" at your unattended set. (See Coverage Paths on page 1-18)

When the Send Calls button is lit, all calls to your set are immediately forwarded to your "Coverage Path" (i.e., to the users who "cover" your calls, and then to AUDIX, if necessary).

Until the call reaches AUDIX, the call *can* be answered at your phone. The call appearance will *flash,* you will hear a "Short Ring" at your set, and your display will show who is calling. To answer the call, simply press the flashing call appearance button. (See Backup Coverage on page 1-13.)

Never use Send Calls *while you are in your office unless you are:*

1. on the phone, or

2. in a meeting that cannot be interrupted.

Always put your phone on Send Calls when you leave your desk for any reason. It will prevent calls from wasting ring time and send any calls directly to coverage.
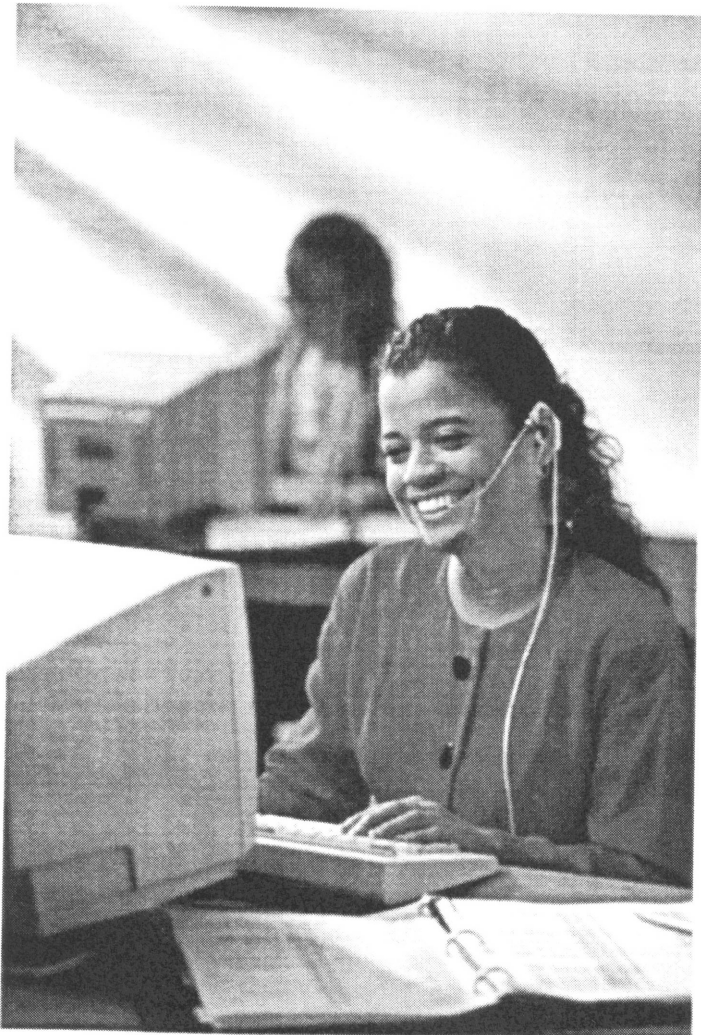
Answering Calls for Others

Part of your job may include providing phone coverage for other staff members. If so, your phone will have the ability to answer their calls on your extension. In many cases, a predefined Coverage Path will automatically cause the staff member's call to ring on your phone under the following conditions:

- If the staff members fail to answer their calls within a certain number of rings;
- If the staff members are busy handling calls on both of their incoming lines;
- If the staff members have left their desk and have activated the ⎡Send Calls⎤ feature.

When calls for another extension rings on your phone, the telephone display will provide the following information:

- The name of the person the call was intended for;
- The caller's name (if it's an internal call);
- The trunk facility's name (e.g., DID or NJ Main, etc.) if it's an outside call;
- The call appearance designator on which the call rang in on;
- The coverage condition which is displayed on the lower right hand corner of your display.

Display Indications for Coverage Calls

When a call is redirected to you by a Coverage Path, a letter on the right side of your display will indicate why the call was redirected.

> a) NJ Main to George Brown   **d**

'**d**'—*signifies that George Brown did not answer his ringing line.*

> a) Pat Smith to Jane Doe   **b**

'**b**'—*signifies that Jane Doe was "busy" on both of her call appearances.*

> a) DID to John Jones   **s**

'**s**'—*signifies that John Jones activated the "Send Calls" feature.*

When answering calls for other staff members, the statements shown below must never *be used:*

- *"I don't think (s)he's accepting calls."*
- *"(S)He doesn't want to be disturbed."*
- *"I think (s)he went to lunch" (at 11:00am).*
- *"(S)He hasn't returned from lunch" (at 3:00pm).*
- *"I'm not her/his secretary. I don't know if (s)he's not in today."*
- *"I haven't seen him/her today."*
- *"I don't know where (s)he is."*
- *"(S)He's not in yet" (at 9:15am).*

Coverage Paths

When a call rings on an institute extension, it will automatically be directed to another extension or to the AUDIX voice mail system if the call is not answered in a preset number of rings. The software that causes this to happen is called a Coverage Path. The steps of a typical AICPA Coverage Path are shown below.

Outside Caller

Outside Caller Dials S. Smith at 201–938–3XXX (NJ) (or) 212–596–6XXX (NYC) (or) 202–434–9XXX (DC).

S. Smith

S. Smith's phone rings three (3) times.

If S. Smith does not answer, call advances through coverage path.

B. Brown

(S. Smith's asst.)

S. Smith's team coordinator's (B. Brown) phone rings four (4) times.

If B. Brown does not answer, call advances through coverage path.

AUDIX

AUDIX Voice Mail answers:

"This is S. Smith, I am away from my desk. . . Please leave a message, or press '0' to be transferred to J. Jones at Extension 3XXX, 6XXX or 4XXX."

Caller presses '0', and telephone system passes call to Receptionist.

Receptionist

Call arrives at Receptionist position.

"How may I help you?"

Consult

(available on 7407(T. Coord.) sets only)

This feature allows a covering user, after answering a call, to speak privately with the Team Captain to determine whether he or she wishes to speak with the calling party.

To consult with a Team Captain, the Team Coordinator must do the following:

1. Press the [Transfer] button; (caller is put on hold);
2. Press the [Consult] button; (Team Captain receives priority ringing);
3. Speak with Team Captain;
4. Press [Transfer] button if Team Captain decides to take the call alone;
   OR
5. Press [Conference] button if Team Captain wants to talk to the caller with the covering user still on the call.

If Team Captain does *not* want to talk to caller, the Team Captain simply hangs up. The Team Coordinator is connected to the caller by pressing the Call Appearance of the held call.

Coverage Callback

(available on 7407(T. Coord.) sets only)

After answering an *internal* call, the Coverage Callback feature allows the *covering* user (Team Coordinator) to leave a Leave Word Calling message for the principal (Team Captain) to call the calling party by simply pressing the [Cov Cback] button. The principal receives no indication that the covering user handled the call.

Transfer Audix

The [Trnsf Audix] button is used when a covering person has answered a call for someone, and the covering person wants to transfer the caller to the desired party's *mailbox*. Follow the steps listed below.

1. Press the [Transfer] key (located above the [Hold] key).
2. Press the [Trnsf Audix] button.
   (Note: On 7406 sets, this may require the use of the [Select] button.)
3. Press the [Transfer] key *again*.

Do not transfer callers to AUDIX without the permission of the caller.

Retrieving Messages

There are two kinds of messages that you may receive via the telephone system. They are: **Leave Word Calling** or **AUDIX Voice Mail Messages.**

Leave Word Calling allows internal users to leave a short, pre-programmed message for other internal users. These messages will appear on the telephone display.

AUDIX Voice Mail Messages allows internal and outside callers to leave detailed messages for you in your voice mailbox.

When either message is left for you, the message light on your telephone automatically lights. When the message light on your phone is lit, you may retrieve your messages by doing the following:

1. Press the Msg Retr button on your set.

   (Note: On 7406 sets, this will require the use of the Select button.)

> ## Messages For Jane Smith

Your display will look like this.

2. Press the Next button on your set. This will allow you to scroll through your messages. If a Leave Word Calling message has been left, your display will look like this:

> ## Dave Johnson 4/13 10:30am 1 Call 3803

A Leave Word Call message.

If an AUDIX Voice Mail message has been left for you, your display will look like this:

> ## Message Center (AUDIX)

An AUDIX message.

3. While a message is *shown on the display*, you can do *any* of the following:
   a. Press the Return Call button on your set. Your set will automatically call the message sender.

> ## a) Dave Johnson

Returning a Leave Word Calling message.

If your display shows "message center (AUDIX)" you must check your AUDIX mailbox. You may press the Return Call button and AUDIX will automatically be dialed. You must then follow your Voice Mail log in procedures to access your messages.

> ## a) Message Center (AUDIX)

Checking Voice Mail messages.

or b. Press the Delete button on your set (may require use of Select button). This will only delete the Leave Word Calling messages from your set's memory. (Note: The Delete button will not delete AUDIX messages. AUDIX messages can only be deleted by accessing your Voice Mailbox.)

> Deleted

Deleting a Leave Word Calling message.

or c. Press the [Next] button to move to the next message.

4. After you have viewed all of your Leave Word Calling messages, and have returned the calls, you should delete each message. (See Item 3.b. preceding.)

   This will allow your message-waiting lamp to be turned out.

   (Note: The message-waiting lamp will *not* go out if there was an AUDIX message and you do *not* check your AUDIX mailbox.)

5. After using the display for "Retrieving Messages," *always* press the [Normal] button. The display will then show you who is calling when your phone rings.

Cover Message Retrieval   (available on 7407(T. Coord.) sets only)

Allows a covering user to retrieve Leave Word Calling messages for other users, as follows:

1. At covering user's set, press [Cov Msg Retr]. Your display will look like this:

> Whose Messages? (Dial Extension Number)

2. Dial the original called party's (principal's) extension number. Your display will show:

> Messages For Jane Smith

3. Press [Next] to scroll through messages.

4. While a message is shown in the display, the covering person can do any of the following:

   a) Press the [Return Call] button to automatically call the message sender.

   b) Press the [Delete] button to delete the Leave Word Calling message from the memory of the principal's set. (Note: The [Delete] button will not delete AUDIX messages. AUDIX messages can only be deleted by accessing your Voice Mailbox.)

   c) Press the [Next] button to move to the next message.

5. After retrieving the messages, press the [Normal] button to place your display in the Normal mode.

Leaving Messages

When you call another internal user, and there is no answer, you may desire to leave a message via the telephone system. If you just want the recipient to call you back, use the Leave Word Calling message system. To leave a detailed message, you may leave a voice recording in the recipient's AUDIX Voice mailbox. This section of the guide describes how to use these features.

Leave Word Calling

Leave Word Calling allows internal users to leave a short, pre-programmed message for other internal users. A Leave Word Calling message can be left for an internal user at any of the following stages of a call:

*   During ringing;
*   When the call is unanswered;
*   When busy tone is heard;
*   When coverage tone is heard;
*   When the call is answered by a covering user.

To leave a Leave Word Calling message, simply do the following:

1. Dial extension number of the internal user you desire to reach.
2. Press the ⌈ Lv Wrd Call ⌉ button. A three-beep confirmation tone is heard indicating that the message was sent.
3. Hang up.
4. The message light on the called party's set will automatically light.

Cancel LWC

A calling user who left a Leave Word Calling message for another user can cancel that message if it has not already been accessed. To cancel a Leave Word Calling message, simply do the following:

1. Lift the handset.
2. Press the ⌈ Cancel LWC ⌉ button. (Note: On 7406 sets this may also require the use of the ⌈ Select ⌉ button.)
3. Dial the extension number of the called party.
4. A three-beep confirmation tone is heard indicating that the message has been deleted from the called party's set. (If the called party has no other messages, the message light on the called party's set will go dark.)

Leaving Messages in AUDIX

There are two ways to leave a message in someone's AUDIX mailbox as follows:

- if you are calling the individual and their **coverage path** causes your call to enter their mailbox where you can leave a message;
- or if you already know that the individual is unavailable to be called, you can record a message in your mailbox and send it directly into the recipient's mailbox. For more information on sending AUDIX messages, see Record Messages beginning on page 2-7.

Bypass AUDIX Greeting

When you reach another user's AUDIX voice mailbox, you can "bypass" their greeting and leave a message right away.

Simply press '1' after the greeting begins. This will cut off the greeting, and will move you immediately to the "tone" that allows you to begin leaving your message.
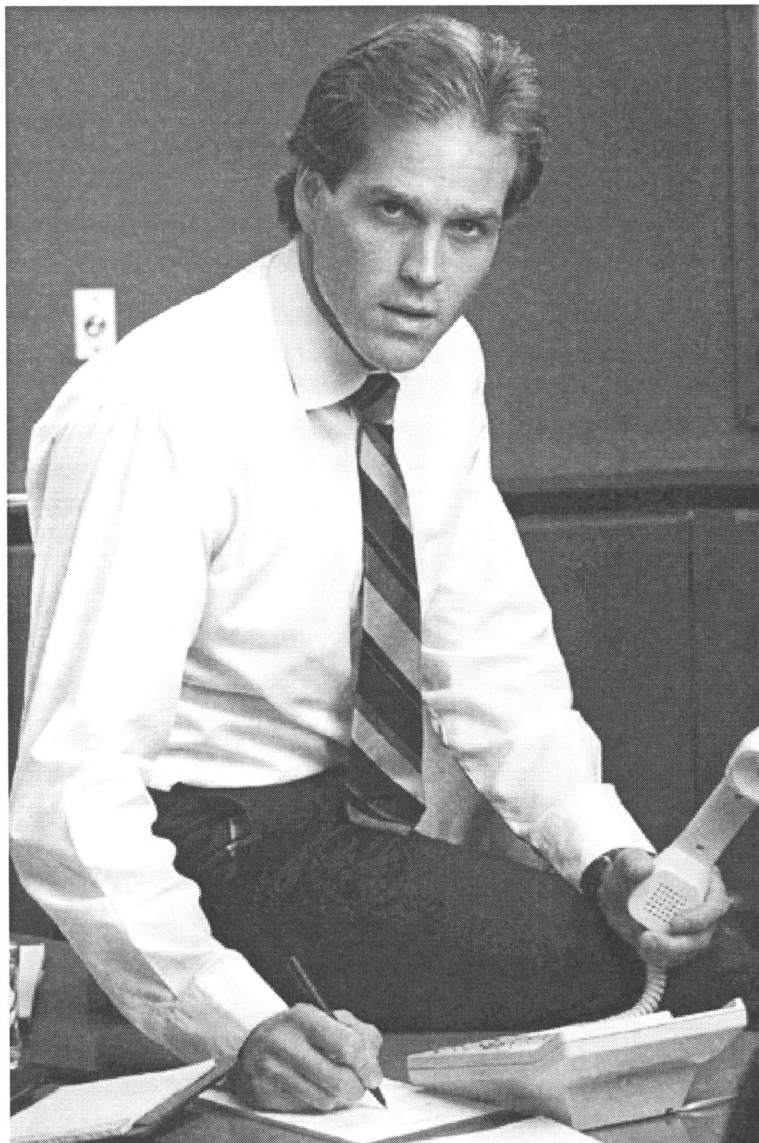
Making Calls

Internal Calling

To make a call, either lift the handset or press Speaker and you will hear a dial tone.

- For internal calls: dial the four digit extension. All extension numbers may be dialed this way including fax machines and modems.

To look up another internal user's extension number, you may use one of the following:

1. Use the AICPA Telephone Directory. This Directory is updated regularly and distributed to all staff members.

2. Use your telephone's Directory feature described below to find other extension numbers at your facility.

```
|  Directory                     |
```

The Directory button allows you to enter the name of another user *in your building*, and obtain that user's extension number. Use the steps listed below.

a. Press Directory button.

   (Note: On 7406 sets, this may require the use of the Select button.)

```
| DIRECTORY—PLEASE ENTER NAME    |
```

a. Use the dial-pad to enter the letters of the desired user's last name.

c. If the first name that appears in your display is not the "correct" name, press the Next button until the desired name (and associated extension number) is displayed.

d. When the desired name (and number) are displayed, press the Return Call button. The desired party will be dialed automatically and the display will return to its "Normal" state.

e. If you choose not to call the displayed phone number, press the Normal button to return the display to its "Normal"state.

Intercom

To save time when calling other persons in a department, many phones have been equipped with an intercom button. The intercom button may be either a dial intercom (after pressing the button, you must dial a code for another member of your department), or an automatic intercom that will immediately dial a preprogrammed extension.

Dial Intercom

With Dial Intercom, a group of users who frequently call each other can do so by pressing a Dial Intercom button and dialing a one- or two-digit code instead of dialing an extension number. To place a call to a member of your Dial Intercom group:

1. Lift the handset.
2. Press ⌈ **Dial Icom** ⌋ .
3. Dial group member's one- or two-digit code (ringback tone is heard).
   * The called party will receive a unique intercom ring, and the lamp associated with the Dial Intercom button will flash.

Auto Intercom

With an Auto Intercom button, users who frequently call each other can do so by pressing one button instead of dialing an extension number (i.e., between a manager and an assistant.)

To make a call to your predetermined Automatic Intercom partner:

1. Lift the handset.
2. Press ⌈ **Auto Icom** ⌋ .
   * The called party will receive a unique intercom ring, and the lamp associated with the Auto Intercom button will flash.

Calls to Other AICPA Facilities

You may call any extension at another AICPA facility by dialing the four digit extension number.

Internal Calling Problems

If you experience line trouble when calling another AICPA location, use the ⌈ **Trunk ID** ⌋ feature while you are on the line and report the problem to the AICPA Telecom Helpline. (See page 1-27.)

Busy Signals and Ring/No Answer

Whenever you make a call to another (internal) user and their phone is either busy or just rings, you can take advantage of several system features. These features are:

Auto Callback: This feature will allow the system to alert you when the called party is available.

Leave Word Calling & AUDIX Voice Mail: These features allow you to leave a message for the called party.

Auto Callback

When placing internal calls, you can press the ⌊ **Auto Cback** ⌋ button on your set whenever you hear a busy signal or the phone rings unanswered.

With Auto Callback, the system will call *you* when the busy party you dialed hangs up from the call they were on. If the phone rang unanswered, the system will call you *after* the next time the called party uses their phone. After you answer the call from the system, the system will automatically re-call the party you had originally dialed.

(Note: This feature "times out" after 30 minutes.)

(This feature does not work for external calls.)

Leave Word Calling

The Leave Word Calling feature should be used whenever you wish to send an internal user a message to call you back. For directions on how to use the Leave Word Calling feature, see page 1-22 of this guide.

Last Number Dial

You may also use the Last Number Dialed feature to redial the "Last" number that was dialed at your convenience. See page 1-30 for more information on using ⌊ **Last # Dial** ⌋ .

Intercept Tones

Occasionally, after dialing an extension, you may hear an intercept tone (like an emergency siren) or a fast busy signal. An intercept tone means you have either misdialed an extension, misused a feature, or you do not have permission to call the number. A fast busy signal means that all the lines used for carrying your type of call are busy. Please try your call again later.

Outside Calling

Telephones at the institute have the ability to make calls to areas appropriate for the type of business being conducted.

To make an outside call:
1. **Lift the handset (or press speaker).**
2. **Dial "9" plus "1" and the area code and number.**
   * **Local calls do not require a "1" or the area code.**

The system will automatically select the least costly route for the call.

*Institute policy dictates that no telephone have the ability to dial outside operators; international calls; '900' and other extra cost numbers and long distance carrier access codes. If you must make one of these types of calls or if you are using your own calling card or credit card, dial '0' for an AICPA operator for assistance in dialing your call. AICPA calling card holders should **not** use the AICPA calling cards to make calls from an Institute facility.*

The AICPA does not object to your receiving necessary incoming calls provided you limit their length and frequency. Do not use or authorize any party to access the toll-free (800' or 888) telephone numbers for personal incoming calls.

You are allowed one personal phone call, of not more than five minutes, to your home daily.

```
Trunk ID
```

Occasionally, users may experience line trouble when placing calls (i.e. static, crosstalk, or other noise). When this happens, users should press the [Trunk ID] button and report the four- to five-digit number that is shown on the lower right hand corner of the display to AICPA Telecom Helpline at ext. 3800.

Abbreviated Dialing

The telephone system has several features that aid in dialing outside numbers. There are [System List], [Personal List] and [AD] buttons.

The [System List] button automatically dials frequently called numbers, such as the State Societies and State Boards of Accountancy, by dialing a three-digit code. The available numbers and their corresponding codes are listed in the AICPA Telephone Directory. To use this feature, press the [System List] button and then enter the appropriate three-digit code. The call will be placed automatically.

The [Personal List] button automatically dials frequently called numbers that are stored by the user. Up to ten numbers can be stored in each extension's personal list. To use this feature, press [Personal List] and the corresponding list number. The call will be placed automatically.

The [AD] buttons found on the 7407 sets each hold a single number in memory for immediate dialing. Use these buttons for your **most frequently called** numbers.

The following pages will provide information on how to program telephone numbers into the "Personal List" and "AD" buttons.

Personal List   for 7406 Users

Follow these instructions to *program:*

1. Lift handset
2. Press [Select] then [Program] buttons
3. Press '1' for List 1
4. Press '1' for first entry
5. Dial '9', '1', area code, phone number
6. Press [#] when done (should hear 3 confirmation tones)
7. For second entry on List 1, press '2'
8. Follow steps 5 and 6 to program additional numbers

Keep a chart of Personal List entries close to your phone as reference.

ENTRY	NAME
1	Building Security
2	Vendor
3	Professional Association
4	
5	
6	
7	
8	
9	
0	

To Dial Number from Personal List:

1. Lift handset
2. Press [Select] then [Personal List] buttons
3. Press Entry 0 through 9
4. Call should go through automatically

Personal List for 7407 Users

Follow these instructions to *program:*

1. Lift handset
2. Press ⎡Program⎤ button
3. Press '2' for List 2
4. Press '1' for first entry
5. Dial '9', '1', area code, phone number
6. Press ⎡#⎤ when done (should hear 3 confirmation tones)
7. For second entry on List 2, press '2'
8. Follow steps 5 and 6 to program additional numbers

To Dial Number from Personal List:

1. Lift handset
2. Press ⎡Personal List⎤ button
3. Press Entry 0 through 9
4. Call should go through automatically

AD Buttons

(available on 7407(T. Coord.), 7407(T. Capt.) and 7444 sets only)

To program:

1. Lift handset
2. Press ⎡Program⎤ button
3. Press ⎡AD⎤ button
4. Dial '9', '1', area code, phone number
5. Press ⎡#⎤ when done (should hear 3 confirmation tones)

To use AD button:

1. Lift handset
2. Press ⎡AD⎤ button
3. Call should go through automatically

Outside Calling Problems

Busy Signals and Ring/No Answer

When making an outside call, you may often encounter busy signals and ring/no answer conditions. If this happens, you can use the system's ⎣ Last # Dial ⎦ feature to try your call again.

| Last Number Dial |

When pressed, the ⎣ Last # Dial ⎦ button on your phone will cause your set to redial the "last number" that was dialed from your set. If you dialed *another* number or extension in the interim after the first call, the system will see *that* number as the "last number" that was dialed.

Intercept Tones

If you hear an intercept tone (it sounds like an emergency siren) during or immediately after dialing an outside number, you probably don't have the correct permission to call the number you are dialing. Please check with the AICPA Telecom Helpline at ext. 3800 if you **need** to make the call.

Fast Busy Signal

If you hear a fast busy signal immediately after dialing an outside number, there are no outgoing lines available to carry your call. When this happens, **immediately** notify the AICPA Telecom Helpline at ext. 3800, and try your call again in a few minutes.

Intercept Messages

After you dial a call, you may occasionally hear a telephone company intercept message telling you that your call did not or could not go through. If this happens, please try dialing your call again. If you still get the message after the third try, **immediately** notify the AICPA Telecom Helpline at ext. 3800.

Static and Other Line Problems

Sometimes when you make or receive an outside call, you will hear static or other noise on the line. When this happens, do the following:

1.   Stay on the line.
2.   Press the ⎣ Trunk ID ⎦ button.
3.   Write down the 5- or 6-digit number that will appear on your display.
4.   Report the trouble to the AICPA Telecom Helpline at ext. 3800.

Disconnecting Calls

When your call has ended, you should disconnect yourself from the line by doing one of the following:

1.   Place the handset back in its cradle.
2.   Press the ⎣ Speaker ⎦ button if you were using the speakerphone and the handset was already in its cradle.
3.   Press the ⎣ Release ⎦ button to end a call, if you have a Callmaster phone.

The AUDIX Voice Mail System

Introduction

Many telephone extensions at the AICPA have an AUDIX (**AUD**io **I**nformation e**X**change) mailbox "attached" to them for sending and receiving recorded voice messages.

AUDIX also provides many additional features for users and automated call routing for incoming calls. These features will be described in this manual.

An AUDIX mailbox user is called a "Subscriber". Subscribers may call their mailbox from any touch tone phone allowing them to get messages, send messages and update greetings anytime, from anywhere in the world.

The owner of each mailbox is responsible for the mailbox's greetings, which play to an incoming caller wishing to leave a message. An AUDIX mailbox can have several different greetings for different purposes.

AUDIX Basics

AUDIX requires each mailbox be protected by a login and password. In order to login, you must know the password of the mailbox. Once logged into the mailbox, the subscriber can:

a) Record and administer their own personal incoming call announcements, which AUDIX calls "greetings".

b) Get messages left in the mailbox from other users and outside callers.

c) Record messages to be sent to other AUDIX subscribers.

d) Use any of AUDIX's other features, like send one message to many subscribers simultaneously.

AUDIX has a comprehensive help system that "talks you through" its layers of menu options. If you need more information or need help, simply press ⌈ * ⌋, ⌈ H ⌋ for HELP at anytime, and as often as needed.

An AUDIX mailbox contain two sections:

* an outgoing message section;

* an incoming message section.

The outgoing section is divided into five categories, as follows:

* undelivered messages

* non-deliverable messages

* delivered messages

* accessed messages

* file cabinet

The incoming section is divided into three categories, as follows:

* new messages

* unopened messages

* old messages

Logging into AUDIX

Subscribers can access their mailboxes and AUDIX's features 24 hours a day from any touch-tone telephone by doing the following:

1. Call AUDIX

    * **Internally**—press the ⌈ AUDIX ⌋ button on your phone.

    * **Externally**—Dial any one of the following AUDIX numbers:
            212-596-6000   888-222-1226
            201-938-3838
            202-434-9254

2. When AUDIX answers, *"Welcome to AUDIX"*, you must log into your mailbox, as follows:

    a) Dial the 4-digit extension number of the mailbox followed by the ⌈ # ⌋ sign; (the extension number is usually the same as your telephone extension number.)

    b) Enter the security password followed by the ⌈ # ⌋ sign. (When a mailbox is new, the AUDIX default password is the ⌈ # ⌋ sign.

       NOTE: The security password prohibits unauthorized access to the AUDIX system.

3. When you have successfully logged in, AUDIX will announce your name or the name that is currently recorded. If there is no name, AUDIX will announce the extension number.

   NOTE: If you are a new subscriber, you will be required to record your name when you log in the first time. AUDIX will prompt you through the steps. The complete instructions on how to record your name are provided on page 2-5.

All mailbox owners are required to have their name recorded in their mailbox. If the name you hear is incorrect when you log in, you must immediately record the correct name.
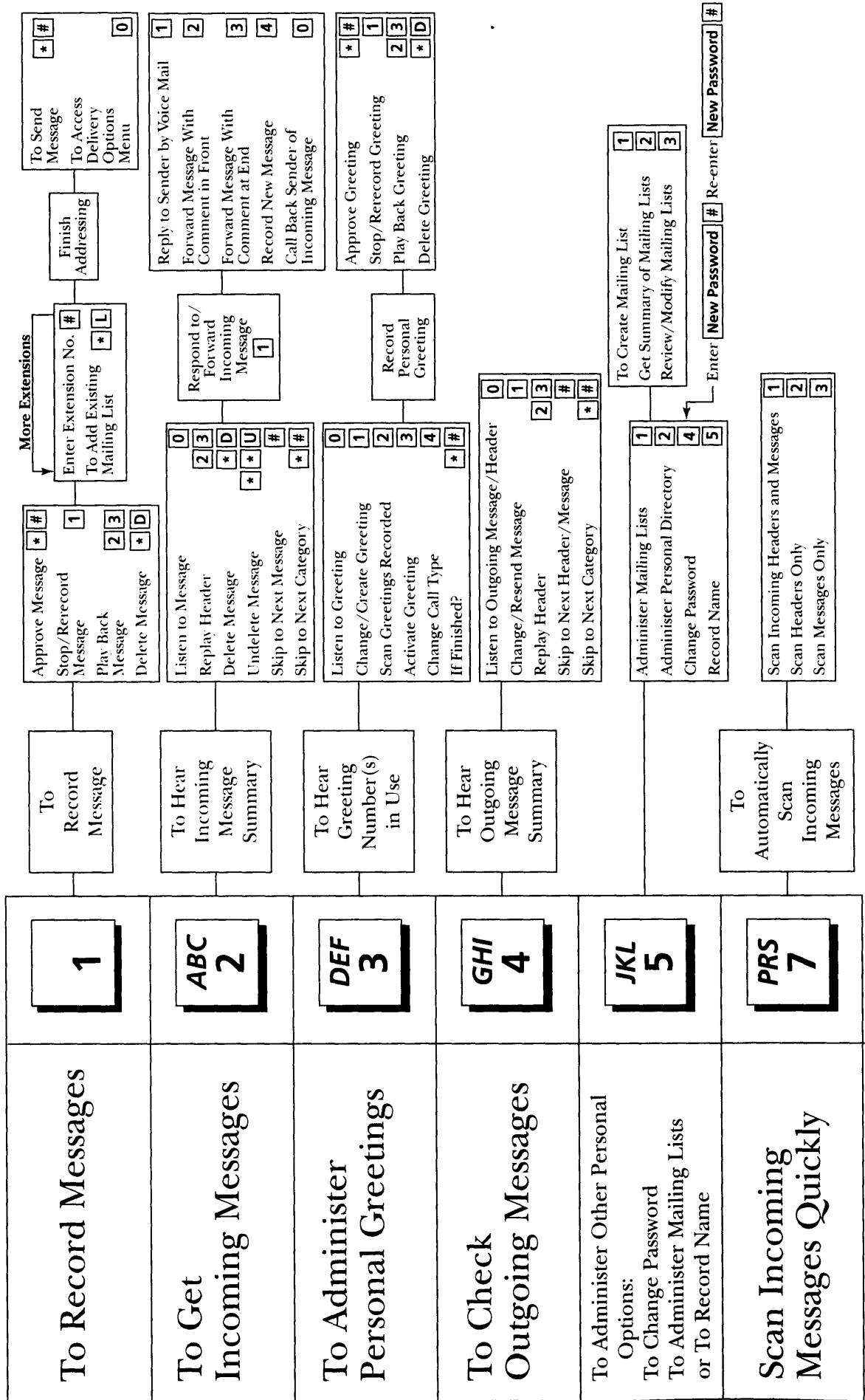
Activity Menu

Subscribers will hear the AUDIX Activity Menu after they have successfully logged into their mailbox. The Activity Menu is a list of the main options that are available to the subscribers. While the AUDIX system prompts its subscribers through each option, subscribers do not need to listen to the end of each announcement if they already know which buttons to press. There are six (6) main activities in the Activity Menu, as shown on page 2-4. When a subscriber accesses his/her mailbox, the subscriber will only hear the first three activities available on the main menu. To hear the complete menu, the subscriber must press ⬚* ⬚H for Help (For more information on the Help feature, see page 2-6.)

Each activity allows the subscriber to access several individual tasks. As you press keys on your telephone keypad, you will move down through different layers of menu options, and the keys on the keypad will change meanings.

To help users become more familiar with AUDIX's various feature menus, flow charts of each menu are included in this section of the guide. Each activity will be discussed in the following sections.

The AUDIX Menu System

[1] To Record Messages

To Record Message
- Approve Message [*] [#]
- Stop/Rerecord Message [1]
- Play Back Message [2] [3]
- Delete Message [*] [D]

More Extensions
- Enter Extension No. [#]
- To Add Existing Mailing List [*] [L]

Finish Addressing
- To Send Message [*] [#]
- To Access Delivery Options Menu [0]

[2] ABC — To Get Incoming Messages

To Hear Incoming Message Summary
- Listen to Message [0]
- Replay Header [2] [3]
- Delete Message [*] [D]
- Undelete Message [*] [U]
- Skip to Next Message [#]
- Skip to Next Category [*] [#]

Respond to/Forward Incoming Message [1]
- Reply to Sender by Voice Mail [1]
- Forward Message With Comment in Front [2]
- Forward Message With Comment at End [3]
- Record New Message [4]
- Call Back Sender of Incoming Message [0]

[3] DEF — To Administer Personal Greetings

To Hear Greeting Number(s) in Use
- Listen to Greeting [0]
- Change/Create Greeting [1]
- Scan Greetings Recorded [2]
- Activate Greeting [3]
- Change Call Type [4]
- If Finished? [*] [#]

Record Personal Greeting [1]
- Approve Greeting [*] [#]
- Stop/Rerecord Greeting [1]
- Play Back Greeting [2] [3]
- Delete Greeting [*] [D]

[4] GHI — To Check Outgoing Messages

To Hear Outgoing Message Summary
- Listen to Outgoing Message/Header [0]
- Change/Resend Message [1]
- Replay Header [2] [3]
- Skip to Next Header/Message [#]
- Skip to Next Category [*] [#]

[5] JKL — To Administer Other Personal Options:
To Change Password, To Administer Mailing Lists or To Record Name

- Administer Mailing Lists [1]
- Administer Personal Directory [2]
- Change Password [4]
- Record Name [5]

- To Create Mailing List [1]
- Get Summary of Mailing Lists [2]
- Review/Modify Mailing Lists [3]

- Enter [New Password] [#] Re-enter [New Password] [#]

[7] PRS — Scan Incoming Messages Quickly

To Automatically Scan Incoming Messages
- Scan Incoming Headers and Messages [1]
- Scan Headers Only [2]
- Scan Messages Only [3]

Setting Up Your AUDIX Mailbox

When you are first assigned an AUDIX mailbox, you will need to make a few modifications to it to comply with AICPA policies governing the use of AUDIX. You will be required to record your name or the name to be associated with the mailbox, a personal greeting to answer incoming calls and a security password. Directions for recording a personal greeting begin on page 2-14.

Recording Your Name

Each mailbox has a recorded name associated with it which AUDIX uses to identify the sender and receiver of voice mail messages, and to help other subscribers find you in the AUDIX directory. The recorded name is used by AUDIX in various announcements and is also played to incoming calls if no "Personal" greeting is active. AICPA policy requires however, that all AUDIX subscribers have an active "Personal" greeting at all times.

To record your name:

1. Log into your Mailbox (as described on page 2-2).
2. Press ⑤ ⑤ after AUDIX acknowledges your login and you will hear the current recorded name of the mailbox.
3. You will then be prompted to record your name. **If you are not ready to record it, hang up now!**, or you may erase the existing mailbox name.
4. At the tone, record your name. When you are finished, press ①.
5. You will then hear what you just recorded.
6. If you wish to record it again, press ①. If you are finished, press ⓧ ⌗.

Establishing Your Password

To access a Voice Mailbox, subscribers must enter a security password as part of the AUDIX Log-In procedure. The security password feature prohibits unauthorized access to the AUDIX system; thus, preventing non-subscribers from accessing confidential information and messages.

The maximum password length is 15 digits. It is required that passwords be at least 4 digits long. In addition, obvious passwords, such as extension numbers, names, and initials, should be avoided.

Each subscriber must define their own security password. Subscribers can change their password at any time.

To change your password, do the following:

1. Log into the AUDIX system.
2. Press ⑤ from the Activity Menu to Administer Personals Options.
3. Press ④ to change your password.
4. Enter your new password (up to 15 digits, 0 through 9) and press the ⌗ key.
5. Enter your new password again, and press ⌗.

Forgetting Your Password or Being "Locked Out" of Your Voice Mailbox

Occasionally, you may forget your password, thereby preventing you from logging in to the AUDIX system. If you try to log in incorrectly too many times, the AUDIX system will *lock* your voice mailbox.

If either of these situations occur, call AICPA Telecom Helpline ext. 3800. The Administrator can unlock your mailbox and re-assign you the default password.

After the administrator changes your password, you should change it again immediately after logging in to the AUDIX system.
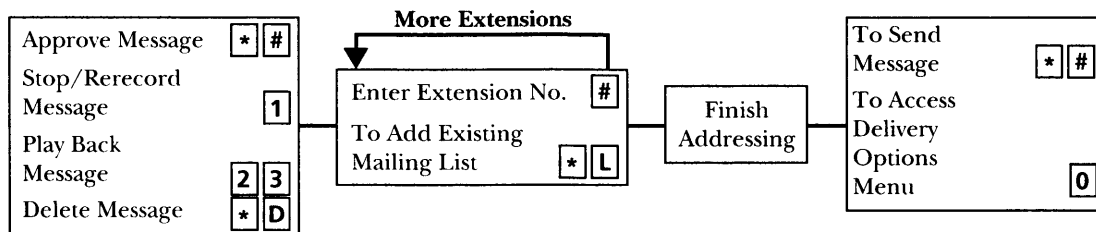
Basic Commands

AUDIX uses several basic commands throughout its menus. These commands are not announced to subscribers, so keep this section of the guide handy until you get used to using these commands. These commands may be pressed at any time while using AUDIX.

Command	Press
Help Tells you where you are in the menus, and what keys you should press.	* H
Restart Interrupts the AUDIX function you are in and returns you to the Activity Menu.	* R
Wait Causes the AUDIX system to pause if you need more time before entering the next command. The AUDIX system will "wait" for you for up to 3 minutes. If you wait the specified time, the AUDIX system will prompt you to enter a command. If no command is entered, the AUDIX system will hang up.	* W
Transfer to a receptionist This command will transfer you out of AUDIX to a receptionist during business hours.	* 0
Look up name/extension in Directory Allows a subscriber to access the directory for all AUDIX subscribers. This command is useful for those subscribers who are on the road and need to leave a message for another subscriber, but do not know the subscriber's extension number. To find a subscriber's extension, use the Touch-Tone key pad to type in the first three letters of the subscriber's last name followed by the # sign. The AUDIX system will announce the subscriber's name and extension number. If the AUDIX system requests more letters, add them from the point where you left off. (For Names, the letter 'Q' is on the 7 key, and 'Z' is on the 9 key.) To find out a name for an extension, press * A (for Alternate Addressing) to switch modes, then enter the extension number followed by the # sign. The AUDIX system will voice the subscriber's name. To exit the directory, press * #.	* * N
Delete Deletes the message or greeting you just heard.	* D
Undelete Undeletes any message that was just deleted. **Note:** * * U must be used immediately after * D or the message will be permanently erased.	* * U
Hold message in category Press * * H while listening to a new message to keep it in the new message category. This action will keep the message light on your telephone activated.	* * H

Addressing Commands	Press
Alternate addressing (switch between name/ext.) in AUDIX directory	* A
Use group mailing list	* L

Record Messages | 1 |

More Extensions

Approve Message	*	#
Stop/Rerecord Message	1
Play Back Message	2	3
Delete Message	*	D

| Enter Extension No. | # |
| To Add Existing Mailing List | * | L |

| Finish Addressing |

| To Send Message | * | # |
| To Access Delivery Options Menu | 0 |

Recording Voice Mail Messages

Subscribers can leave Voice Mail messages for other AUDIX subscribers in two ways:

1. Via the Call Answer feature which routes the caller via coverage to AUDIX, and offers the caller an opportunity to leave a Voice Mail message if the called party is not available.

2. By calling AUDIX directly and recording a message that can be sent to one or more AUDIX subscribers.

This section will discuss the latter method.

The ability to Record Voice Mail Messages is an invaluable feature which allows subscribers to transfer information easily. For example, to inform several individuals about a scheduled meeting, one message can be recorded and addressed to the appropriate subscribers. The AUDIX system will transmit a copy to each person designated, and will inform them that the message exists via the Message Waiting light.

To record a Voice Mail message, do the following:

1. Log into the AUDIX system.

2. Press ☐1☐ to record messages.

3. Speak your message. (NOTE: While you are recording the message, you can use any of the Playback controls discussed on page 2-10).

   * To temporarily suspend recording:
     a. Press ☐1☐ (if you want to pause and collect your thoughts).
     b. Press ☐1☐ again to continue recording. The AUDIX system will continue recording without a break in the message.

   * To rewind and play back the message:
     a. Press ☐1☐ to stop recording.
     b. Press ☐2☐ to rewind to the beginning of the message.
     c. Press ☐3☐ to play the message. You can also press ☐5☐ to *rewind* the message in 4 second intervals or ☐6☐ to *advance* through the message in 4 second intervals.

   * To delete this message and record a new one:
     a. Press ☐1☐ to stop recording.
     b. If you are not satisfied with the message you have just recorded and want to re-record it, press ☐*☐ ☐D☐ to delete the message. Then, press ☐1☐ to begin recording a new message.

4. If you are satisfied with your message and want to approve it, press ☐*☐ ☐#☐.

5. You must now address the message. Refer to the *Addressing a Voice Mail Message* procedure discussed on the next page.

1 Record Messages

Addressing a Voice Mail Message

You can address a Voice Mail Message by extension number, name, or Mailing List, and you can combine any of these methods to address one message to several recipients. Addressing by list is explained in detail in the *Mailing List* section of this manual.

To address a Voice Mail message, do the following:

1. After you have approved your message, the AUDIX system will ask you to enter an address (extension number or name of the recipient).
   - To address individual recipients:
     a. Enter the recipient's address (either name or extension). You may switch back and forth between name and extension addressing by pressing ⟦ * ⟧ ⟦ A ⟧.
     b. Press ⟦ # ⟧ to signal that you have entered the address.

        The AUDIX system will voice the recipient's name or extension if no name has been recorded for that subscriber. If this is not the person you intended the message to be sent to, press ⟦ * ⟧ ⟦ D ⟧ to delete this address.

     c. If you want to add more addresses, return to step 'a'. If you want to add additional addresses using a Mailing List, refer to page 2-20 of this manual.

2. Take one of the following actions according to your needs:
   - To review the list of addresses, press ⟦ * ⟧ ⟦ 1 ⟧.
   - To approve the addresses:
     a. Press ⟦ * ⟧ ⟦ # ⟧.
     b. You may either deliver the message immediately by pressing ⟦ * ⟧ ⟦ # ⟧ again, or schedule when the message is to be delivered by doing the following.
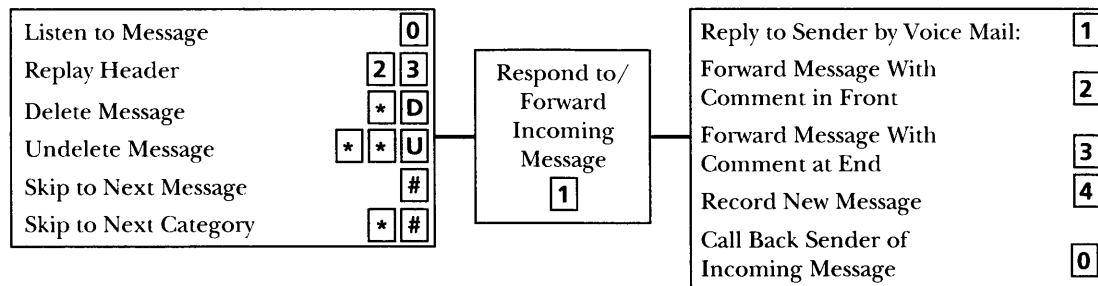
Delivery Scheduling

After you record and address a Voice Mail message, you must instruct the AUDIX system when to deliver the message to the recipient's mailbox.

To schedule a Voice Mail message for delivery:

1. To deliver the message immediately, simply press ⟦ * ⟧ ⟦ # ⟧.
2. To hear a list of delivery options, press ⟦ 0 ⟧.
3. To designate a message as "private", press ⟦ 1 ⟧. A message marked as "private" prevents the recipient from forwarding this message to other subscribers.

   By pressing the ⟦ 1 ⟧ key again, you can change the message back to its original form.
4. To schedule delivery of a message, press ⟦ 3 ⟧.
   a. Enter the hour of delivery and the minutes. For example, press ⟦ 2 ⟧ ⟦ 0 ⟧ ⟦ 5 ⟧ for 2:05, then press ⟦ A ⟧ for A.M. or ⟦ P ⟧ for P.M. The AUDIX system needs either one or two digits for the hour, but always requires two digits for the minutes.
   b. Press ⟦ # ⟧ to signal that you have entered the delivery time.
   c. Enter the date the message is to be delivered on. To deliver the message on a later date, enter the numbers for the month and day of delivery. For example, press ⟦ 8 ⟧ ⟦ 2 ⟧ ⟦ 9 ⟧ for August 29th. The month can be either one or two digits, while the day requires two digits.
   d. Press ⟦ # ⟧ to signal that you have entered the delivery date.
   e. Listen while the AUDIX system repeats the entire schedule. If the schedule is incorrect, press ⟦ * ⟧ ⟦ D ⟧ to delete, and repeat steps 4a through 4d. To approve schedule, press ⟦ * ⟧ ⟦ # ⟧.
5. To file a copy of this message in your mailbox, press ⟦ 4 ⟧.
6. To send the message and to exit the Delivery Menu, press ⟦ * ⟧ ⟦ # ⟧. The AUDIX system will automatically return you to the Activity Menu.

Retrieve Messages $\boxed{\begin{array}{c}ABC\\2\end{array}}$

Listen to Message	$\boxed{0}$
Replay Header	$\boxed{2}\boxed{3}$
Delete Message	$\boxed{*}\boxed{D}$
Undelete Message	$\boxed{*}\boxed{*}\boxed{U}$
Skip to Next Message	$\boxed{\#}$
Skip to Next Category	$\boxed{*}\boxed{\#}$

Respond to/ Forward Incoming Message $\boxed{1}$

Reply to Sender by Voice Mail:	$\boxed{1}$
Forward Message With Comment in Front	$\boxed{2}$
Forward Message With Comment at End	$\boxed{3}$
Record New Message	$\boxed{4}$
Call Back Sender of Incoming Message	$\boxed{0}$

Retrieving Messages

Messages left by callers in your AUDIX mailbox are called Call Answer or Voice Mail messages. Whenever your telephone's message light is on, you may have new AUDIX Call Answer or Voice Mail messages. Audix messages should be retrieved regularly (even when working out of the office) throughout the business day and calls returned the same day. The worst case response time should be within 24 hours of the original call.

To retrieve messages left in your mailbox:

1. Log into your mailbox.
2. After AUDIX acknowledges your login, it will tell you how many 'new' messages you have. A 'new' message is any message that you have not yet listened to.
3. Press $\boxed{2}$ to retrieve your messages.
4. You will then hear the header of the first message. The header tells you when the message was left, and, if it is from another subscriber, who sent it.
5. After listening to the header, press $\boxed{0}$ to hear the message.
6. After listening to the message, you may:

   a. Press $\boxed{1}$ to respond to or forward a copy of the message to another subscriber.

   b. Press $\boxed{*}$ $\boxed{D}$ to delete the message.

   If you accidentally delete the message, it can be restored by pressing $\boxed{*}$ $\boxed{*}$ $\boxed{U}$ *immediately* after deleting it. Once you perform another function in AUDIX, the message is erased from AUDIX's memory and cannot be restored.

   c. Press $\boxed{*}$ $\boxed{*}$ $\boxed{H}$ to hold this message in the "new" category and save it until later. Your message-waiting lamp will stay on and the AUDIX system will go to the next header.

   d. Press $\boxed{\#}$ to save this message and skip to the next message.

   If you skip to the next message, the message you just listened to is not erased, but is placed into the "old" message category.

   NOTE: Because digital voice storage requires a large amount of AUDIX disc space, each mailbox has a limited amount of storage space for messages. AUDIX will warn you when your mailbox approaches the "full" state. If your mailbox becomes full, it will not accept any new messages and will announce this to the caller when they attempt to leave a message. *Additionally, AUDIX will normally delete any new and old messages after 8 calendar days.*

| ABC |
| 2 | **Retrieve Messages**

Message Playback Controls

Audix has a set of message playback commands that give the subscriber "dictating machine" capabilities when listening to messages. These commands are used only when listening to or recording messages.

```
┌─────────────────────────────────────────────┐
│  ┌───────────────────────────────────────┐  │
│  │        PLAY-BACK CONTROLS             │  │
│  └───────────────────────────────────────┘  │
│                                              │
│              Rewind        Play/Pause        │
│   ┌───┐      ┌─────┐        ┌─────┐          │
│   │ 1 │      │ ABC │        │ DEF │          │
│   └───┘      │  2  │        │  3  │          │
│              └─────┘        └─────┘          │
│                                              │
│   Louder     Back Up        Advance          │
│   ┌─────┐    ┌─────┐        ┌─────┐          │
│   │ GHI │    │ JKL │        │ MNO │          │
│   │  4  │    │  5  │        │  6  │          │
│   └─────┘    └─────┘        └─────┘          │
│                                              │
│   Softer     Slower         Faster           │
│   ┌─────┐    ┌─────┐        ┌─────┐          │
│   │ PRS │    │ TUV │        │ WXY │          │
│   │  7  │    │  8  │        │  9  │          │
│   └─────┘    └─────┘        └─────┘          │
│                                              │
│              Listen/Replay   Skip            │
│   ┌───┐      ┌─────┐        ┌─────┐          │
│   │ * │      │  0  │        │  #  │          │
│   └───┘      └─────┘        └─────┘          │
│                                              │
│   Press 3 to pause and 3 again to continue.  │
└─────────────────────────────────────────────┘
```

Responding to a Message

If you choose to respond to an incoming message, you can choose from one of these four choices:

- Reply to the sender immediately by Voice Mail, using the Automatic Reply feature.

- Add a comment to either the beginning or end of the message and forward it. (This is not an option if the sender designated the message as private, if this is a LWC message, or if this is a non-deliverable message notification message.)

- Create a new Voice Mail message for a person or persons other than the sender.

- Transfer out of the AUDIX system without hanging up, and let the AUDIX system call the sender automatically.

Each of these options is discussed on the following pages.

Retrieve Messages

<div style="float:right">

ABC

2

</div>

a) Returning the Call Automatically

When you receive a message from someone within your company and the AUDIX system tells you the name or extension of the sender, you may be able to transfer out of the AUDIX system and return the call directly without first hanging up.

After listening to the message, to call the sender immediately without first hanging up or returning to the Activity Menu:

1. Press ☐1☐ to respond.

2. Press ☐0☐ to call the sender.

The AUDIX system will automatically place the call and save the sender's message in the *old message* category.

If you transfer out of the AUDIX system and then leave a message in another AUDIX subscriber's mailbox, you can return to your own mailbox without hanging up and placing another call. After you have spoken your message, press ☐*☐ ☐R☐ and log into the AUDIX system again.

b) Replying to Sender Via Voice Mail

You can immediately reply to a subscriber who has sent you a message with a Voice Mail message of your own. There is no need to wait until you have heard all of your incoming messages or to return to the Activity Menu.

To reply to another subscriber by Voice Mail, do the following:

1. Press ☐1☐ to respond.

2. Press ☐1☐ to reply to the sender via Voice Mail.

3. Press ☐Y☐ (for *yes*) to attach a copy of the original message, or press ☐N☐ (for *no*). If the original message was a *private* message, you will not be able to forward it to other subscribers.

4. Speak your message.

5. Press ☐1☐ to stop recording (this is an optional step).

6. Press ☐2☐ ☐3☐ to rewind and replay your reply before approving it. Otherwise, go on to step 7. If you are not satisfied with your reply and you want to re-record it, press ☐2☐ to rewind (or ☐*☐ ☐D☐ to delete). Then, press ☐1☐ to begin recording, and follow steps 4 through 6.

7. Press ☐*☐ ☐#☐ to approve your reply. The AUDIX system automatically addresses your response.

8. Press ☐*☐ ☐#☐ to schedule immediate delivery, or see the ***Delivery Scheduling*** section on page 2-8 for information on scheduling a future delivery, making this message private, or to file a copy of your reply.

9. You will be returned to receiving your messages. Take one of the following actions according to your needs:

   • To hear the original message you just replied to, press ☐0☐.

   • To delete the message you just replied to, press ☐*☐ ☐D☐.

   • To skip to the next message, press ☐#☐.

ABC
2
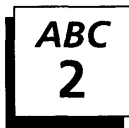
Retrieve Messages

c)   **Forwarding Messages with Your Comments**

You can add a comment to the beginning or end of your incoming message and then redirect the combination. However, if the AUDIX system informs you that the message is private, you cannot forward it.

To add your comments to the beginning or end of an incoming message and forward them, do the following:

1. Press ⬛1⬛ to respond.

2. Take one of the following actions according to your needs:
    *   To add your comment to the beginning of the original message, press ⬛2⬛.
    *   To add your comment to the end of the message, press ⬛3⬛.

3. Speak your comment.

4. Press ⬛1⬛ to stop recording (this is an optional step).

5. Press ⬛2⬛ ⬛3⬛ to rewind and replay if you want to hear your comment before approving it. Otherwise, go to step 6.

    If you are not satisfied with your comment, you can re-record it, press ⬛2⬛ to rewind (or ⬛*⬛ ⬛D⬛ to delete). Then, press ⬛1⬛ to begin recording, and follow steps 3 through 5.

6. Press ⬛*⬛ ⬛#⬛ to approve your comment.

7. Enter the recipient's address.

8. Press ⬛#⬛ to signal that you have entered the address.

9. Repeat steps 7 and 8 for more than one recipient.

10. Press ⬛*⬛ ⬛#⬛ to tell the AUDIX system that you have finished addressing.

11. Press ⬛*⬛ ⬛#⬛ to schedule immediate delivery, or see the *Delivery Scheduling* section on page 2-8 for information on scheduling a future delivery, making a message private, or filing a copy of this message.

12. You will be returned to receiving your messages. Take one of the following actions according to your needs:
    *   To hear the original message you just forwarded, press ⬛0⬛.
    *   To delete the message you just forwarded, press ⬛*⬛ ⬛D⬛.
    *   To skip to the next message, press ⬛#⬛.

Retrieve Messages

ABC
2

d) Creating a New Message for a Third Person

After you have just listened to an incoming Voice Mail message, you can create a new message and address it to a third person without returning to the Activity Menu.

To create a new message and send it to one or more persons other than the sender of the last message, do the following:
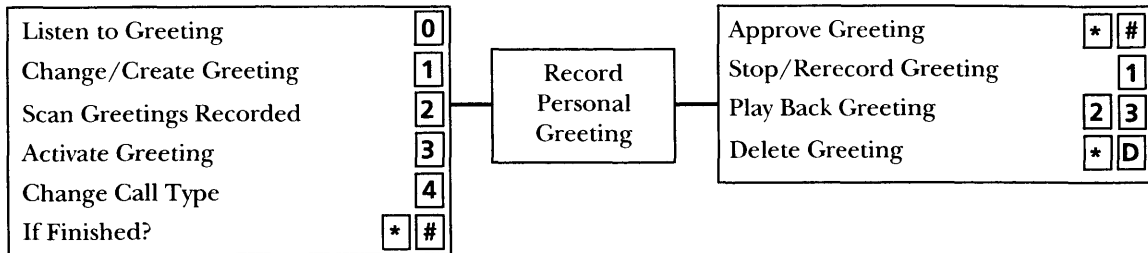
1. Press 1 to respond.
2. Press 4 to create a new message.
3. Speak your message.
4. Press 1 to stop recording (this is an optional step).
5. Press 2 3 to rewind and play if you want to hear your message before approving it. Otherwise, go on to step 6.

   If you are not satisfied with the message you have just recorded and you want to re-record it, press 2 to rewind (or * D to delete). Then, press 1 to begin recording, and follow steps 3 through 5.
6. Press * # to approve your message.
7. Enter the new recipient's address.
8. Press # to signal that you have entered the new address.
9. Repeat steps 7 and 8 for more than one recipient.
10. Press * # to tell the AUDIX system that you have finished addressing.
11. Press * # to schedule immediate delivery, or see the *Delivery Scheduling* section on page 2-8 for information on scheduling a future delivery, making a message private, or filing a copy of this message.
12. You will be returned to receiving your messages. Take one of the following actions according to your needs:
    - To hear the last message, press 0 .
    - To delete the message, press * D .
    - To skip to the next message, press # .

DEF 3   Administer Greetings

Listen to Greeting	`0`		Approve Greeting	`*` `#`	
Change/Create Greeting	`1`	Record	Stop/Rerecord Greeting	`1`	
Scan Greetings Recorded	`2`	Personal	Play Back Greeting	`2` `3`	
Activate Greeting	`3`	Greeting	Delete Greeting	`*` `D`	
Change Call Type	`4`				
If Finished?	`*` `#`				

Personal Greetings

When outside callers dial an AICPA employee on their direct (D.I.D.) number, and that call is not answered by the employee or someone in their coverage path (see page 1-18), the call is routed to the AUDIX mailbox associated with the employee's D.I.D./extension number. *The Institute requires that appropriate personal greetings be active on all staff mailboxes.*

Each user can pre-record up to 9 different personal greetings. However, only 1 greeting can be activated at a time. When a greeting is activated, a "subscriber recorded" message is played to incoming calls, much like a home answering machine's "outgoing" message.

A personal greeting must inform the caller of the employee's current attendance status, when the caller can expect a return call and/or identify another employee who can assist the caller.

To record one personal greeting for all calls:

1. Log into your mailbox.
2. Press `3` `1` after AUDIX acknowledges your login and you will be prompted to enter a greeting number (any number between 1 and 9).
3. If you have never recorded a personal greeting, press `1`. If you have, enter the greeting number of your choice.
4. If there is already a greeting recorded for that number, AUDIX will tell you its status. You may choose to record over it or select a new number by pressing `*` `#` `1`.
5. You will then be prompted to press `1` to record your greeting.
   If the suggested greetings listed on the next page are not appropriate for your situation, please compose an appropriate greeting.
6. After you finish recording, press `1`.
7. To hear what was recorded, press `2` `3`.
8. If the recording is acceptable, press `*` `#` to approve it.
9. If you wish to re-record it, press `*` `3` (or `*` `D`) to delete. Then `1` to re-record.
10. To activate or use the personal greeting that was just recorded, for all calls, press `1`.

To activate a different personal greeting:

1. Log into your mailbox.
2. Press `3` `3` after AUDIX acknowledges your login and you will be prompted to enter a greeting number (any number between 1 and 9).
3. AUDIX will then confirm that the greeting number entered is now "active for all calls."
   Subscribers should activate an appropriate greeting whenever their "attendance status" changes. Remember, greetings can be activated from anywhere at anytime.

Administer Greetings

DEF
3

Suggested AUDIX Personal Greetings

Standard Message—Office Staff

Hello. This is _____ (name) at the AICPA. Today, _____ (day, date), I am in the office, but I'm currently away from my desk. At the tone, please leave your name, telephone number, and a brief message. I will return your call as soon as possible. If it is during business hours, and you need immediate assistance, please press "0" to be transferred to someone on my team who can assist you.

Thank you and have a nice day.

Employees Who Are Working Outside Office

Hello. This is _____ (name) at the AICPA. Today is _____ (day, date). I am not in the office today, however I will be retrieving my messages throughout the day. At the tone, please leave your name, number, and a brief message. If you require immediate assistance, during business hours, you may press "0" to be transferred to someone on my team who can assist you.

Employees Out Of The Office

Hello. This is _____ (name) at the AICPA. I will be out of the office until _____ (month, date). During business hours, please press "0" to be transferred to someone on my team who can assist you.

Using Different Personal Greetings for Different Call Types

The Multiple Personal Greeting feature is a very powerful tool that allows subscribers to instruct the AUDIX system to play specific greetings to different types of callers. To do this, you must first define the different types of calls you want the AUDIX system to distinguish between. You must then record the different greetings and activate them.

Decide which of the following distinctions you want the AUDIX system to make when answering your calls:
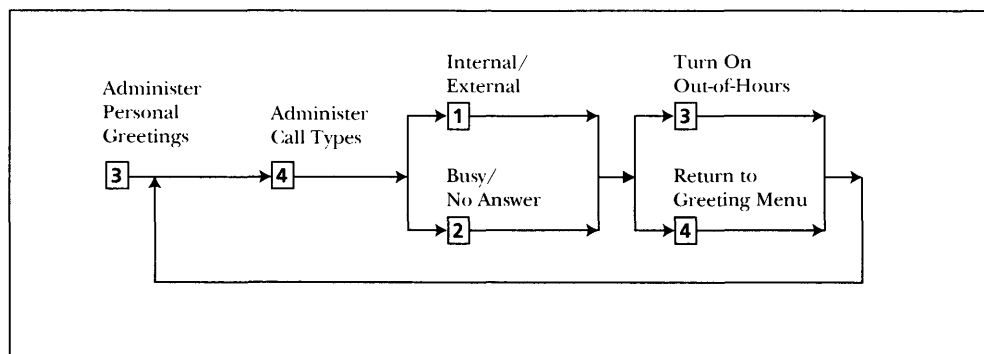
- *internal* (in-house) versus *external* (outside) calls

- *busy* versus *no answer* calls

- *prime-time* (business hours) versus *out-of-hours* (non-business hours) calls

- *prime-time/internal* versus *prime-time/external* calls, and *out-of-hours* calls

- *prime-time/busy* versus *prime-time/no answer* calls, and *out-of-hours* calls

After you have decided which call types you want to use, you should assign a number between 1 and 9 to each type. For example, if you choose to differentiate between internal and external calls, you could identify greeting 1 as your internal personal greeting and greeting 2 as your external personal greeting. You should then consider what message you want to record for each greeting. After recording your greetings you will need to activate the appropriate ones.

Initial Call Type Administration

If you are new to Multiple Personal Greetings, your first task *must* be to administer the types of calls that you want the AUDIX system to distinguish between.

If the AUDIX system is currently answering all calls with a single greeting, use the following procedures to instruct the AUDIX system to distinguish between different call types.

```
                          Internal/          Turn On
  Administer              External           Out-of-Hours
  Personal   Administer  ┌──┐              ┌──┐
  Greetings  Call Types  │1 │─────────→    │3 │─────────→
  ┌──┐       ┌──┐      →└──┘              →└──┘
  │3 │─────→ │4 │─────→                 
  └──┘     ↑ └──┘       Busy/              Return to
         │              No Answer          Greeting Menu
         │              ┌──┐              ┌──┐
         │            →│2 │─────────→    →│4 │─────────→
         │              └──┘              └──┘
         └────────────────────────────────────
```

1. Log on to the AUDIX system.
2. Press ⬛3 to access the Personal Greeting Administration Menu.
3. Press ⬛4 to administer call types.
4. Do one of the following:
   - Press ⬛1 to distinguish between internal (from other AICPA users) and external (outside) calls. These distinctions relate to where the *caller* is calling from.
   - Press ⬛2 to distinguish between busy and no answer calls. These distinctions relate to whether *you* are on the telephone or not at your desk.

   Note: The internal/external and busy/no answer call types are mutually exclusive. It is not possible to set the AUDIX system to respond to *both* sets of situations.
5. Do one of the following:
   - To additionally distinguish calls that are made during business hours (9am–5pm ET) from those that are made during non-business hours (these time periods are defined by the system administrator), press ⬛3. You will be returned to the Personal Greeting Administration Menu.

   Note: To set up different greetings strictly for prime-time and out-of-hours calls, it is necessary initially to specify internal/external or busy/no answer call types *and* the out-of-hours call type. When the out-of-hours call type is specified, the other call types (busy/no answer or internal/external) automatically apply only to *prime-time* calls.

   - To approve the internal/external or busy/no answer setting without distinguishing between prime-time and out-of-hours calls, press ⬛4. You will be returned to the Personal Greeting Administration Menu.
6. Press ⬛* ⬛# to return to the Activity Menu.
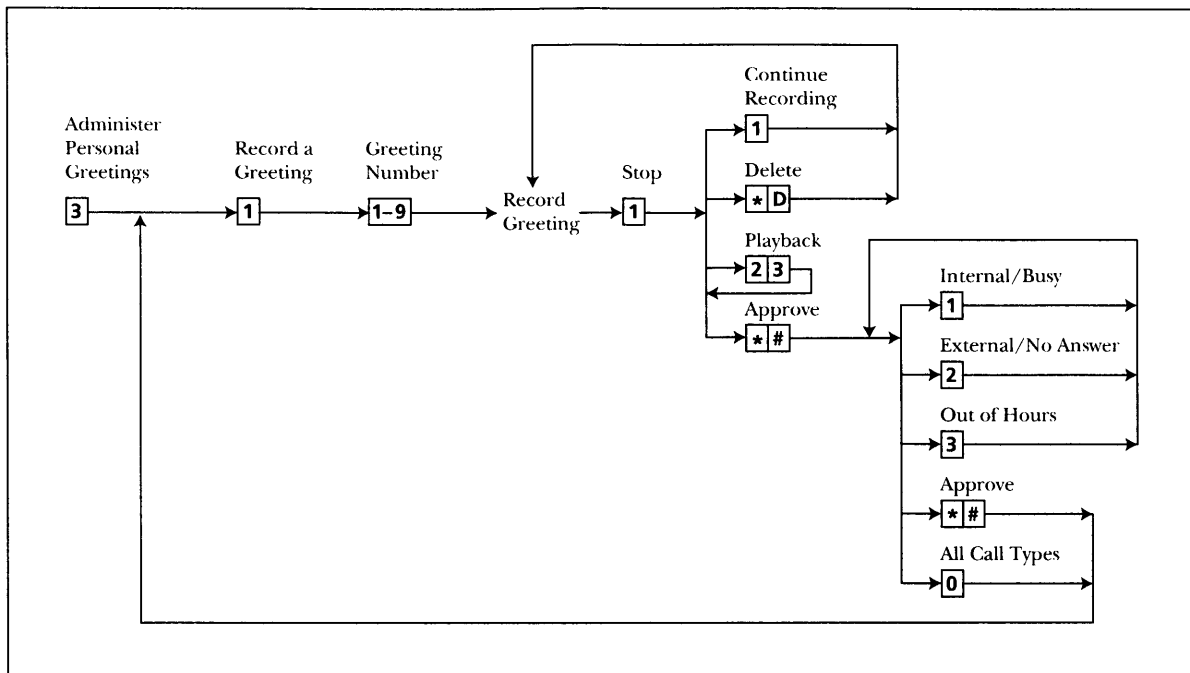
Recording and Activating a New Personal Greeting

To record and activate a new personal greeting for any or every call type, do the following:

1. Log on to the AUDIX system.
2. Press ⬚3 to access the Personal Greeting Administration Menu.
3. Press ⬚1 to record a greeting.
4. Identify the personal greeting that you are about to record by pressing a number on the telephone keypad (1 through 9).
5. Record your greeting at the tone.
6. Press ⬚1 to stop recording (this is an optional step).
7. Do one of the following:
   - To continue recording, press ⬚1 and return to step 5.
   - To delete the greeting, press ⬚* ⬚D and return to step 5 to re-record.
   - To playback the greeting, press ⬚2 ⬚3 and return to the beginning of this step.
   - To approve the greeting, press ⬚* ⬚#. If the greeting is active, you are returned to the Personal Greeting Administration Menu. If the greeting is *not* active, go on to step 8.
8. Listen to the AUDIX prompts and select the appropriate call types for this greeting (0 through 3). The prompts will vary depending on which call types you have administered. When you are finished, or if you do not want to activate the greeting, press ⬚* ⬚# and you will be returned to the Personal Greeting Menu.

GHI	
4	**Check Outgoing Messages**

Listen to Outgoing Message/Header	0
Change/Resend Message	1
Replay Header	2 3
Skip to Next Header/Message	#
Skip to Next Category	* #

AUDIX mailboxes are divided into two (2) sections:

* the incoming mailbox;

* the outgoing mailbox.

The incoming section of the mailbox receives messages from other subscribers and all callers who are re-directed to the AUDIX system via coverage. The incoming section is discussed on page 2-9.

After you create, address, and schedule a Voice Mail message to be delivered to another subscriber, the AUDIX system will deposit the message header in your outgoing section of your mailbox. By reviewing your outgoing messages, you can determine whether your messages have been delivered, and also whether the recipients have listened to the headers. You cannot, however, determine what happened to the message after the recipient listened to the header.

The outgoing section of the mailbox is divided into five categories, as follows:

File Cabinet	The File Cabinet stores copies of messages that have been created to send to other subscribers for future reference. These messages may later be accessed, modified, addressed and sent again, or deleted.
Undelivered Messages	Undelivered messages are messages that have not yet been sent (for example, those scheduled for delivery at a future time or date). Undelivered messages and their addresses may be accessed or changed at any time *before* delivery.
Nondeliverable Messages	Nondeliverable messages are copies of messages that could not be delivered. The AUDIX system will attempt to deliver the message up to 10 times. Messages defined as "nondeliverable" may be rescheduled for delivery with a new address (extension).
Delivered Messages	Delivered Messages are copies of message *headers* that have been successfully delivered to a recipient's incoming mailbox, but have not yet been listened to.
Accessed Messages	Accessed messages are copies of message *headers* that have been delivered to a recipient, and either the header or the message has been listened to.

a) **Reviewing Outgoing and Filed Messages**

To review your outgoing and file cabinet messages, do the following:

1. Log into the AUDIX system.

2. Press 4 to Check Your Outgoing Messages.

3. Take one of the following actions according to your needs:

* To listen to an undelivered or file cabinet header and message:

a. Listen to the header.

b. Press 0 to listen to the message.

c. Go on to step 4.

Check Outgoing Messages ⌐GHI 4⌐

- To review just the headers of any of your outgoing messages (undelivered, nondeliverable, delivered, file cabinet, or accessed):

    a. Listen to the header.

    c. Go on to step 4.

4. Take one of the following actions according to your needs:

    - To skip to the next header, press `#`.

    - To delete the header (and message, if one is attached): press `*` `D`.

    - To skip to the next category of outgoing mail: press `*` `#`.

b) Modifying and Resending Outgoing and Filed Messages

To modify or resend a message that has not yet been *delivered*, was marked as *nondeliverable*, or is *residing in your file cabinet*, do the following:
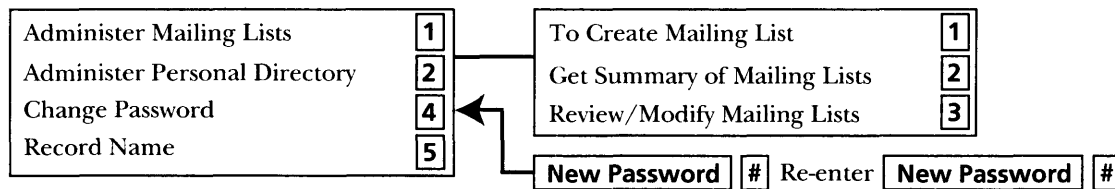
1. Log into the AUDIX system.

2. Press `4` to Check Your Outgoing Messages.

    If the message that you want to modify is not the first one that the AUDIX system presents to you, press `#` one or more times to skip to the appropriate message. Or, press `*` `#` to skip to the appropriate message category.

3. Press `0` to listen to the message.

4. Press `1` to modify or resend the message.

5. Take one of the following actions according to your needs:

    - To send the message as it already exists:

        a. Press `*` `#` to keep the message as you originally recorded it.

        b. Go on to step 6.

    - To modify the message:

        a. Press `1` to re-record.

        b. Speak your new message.

        c. Press `1` to stop recording.

        d. Press `2` `3` to rewind and listen to your recording.

        e. Press `*` `#` to approve your recording.

6. To resend to a new recipient:

    a. Enter the new recipient's address.

    b. Press `#` to signal that you have entered the address.

    c. Repeat steps a and b for more than one recipient.

    d. Go on to step 7.

7. Press `*` `#` to tell the AUDIX system that you have finished addressing, and then reschedule the message for future delivery (see the *Delivery Scheduling* section on page 2-8 for more information). The AUDIX system will then return you to reviewing your outgoing and filed messages.

    NOTE: When modifying and re-sending a message from your file cabinet, you must press `4` to file a copy again. If you do not press `4`, the message will be deleted from your file cabinet.

JKL
5   **Mailing Lists**

Administer Mailing Lists	**1**	To Create Mailing List	**1**
Administer Personal Directory	**2**	Get Summary of Mailing Lists	**2**
Change Password	**4**	Review/Modify Mailing Lists	**3**
Record Name	**5**		

New Password # Re-enter New Password #

Mailing Lists

Mailing Lists are a convenient way to send the same message to several subscribers. For example, to inform an entire department about a scheduled meeting, one message can be created. The message is addressed using a pre-defined list containing the names or extensions of all members of the department. The AUDIX system will transmit a copy of the message to each person on the list.

Each subscriber can create up to 25 mailing lists. The total number of recipients in *all* lists must not exceed 250.

Subscribers can make their Mailing Lists private or public. A *private* list can be accessed and used only by the creator of the list. A *public* list allows other subscribers to use that list to address their messages, if they know the List ID number. Regardless of whether the list is public or private, *only* the creator of a list can modify or delete it.

a)   Creating a Mailing List

To create a Mailing List, do the following:

1. Log into the AUDIX system.
2. Press ⎡5⎤ at the Activity Menu to Administer Personal Options.
3. Press ⎡1⎤ to Administer Mailing Lists.
4. Press ⎡1⎤ to Create a Mailing List.
5. Enter a List ID of up to 6 letters or digits for your list.
6. Press ⎡#⎤ to signal that you have entered the List ID.
7. Press ⎡1⎤ if you want your list to be private, or press ⎡2⎤ if you want to make your list public.
8. Enter the extension number or name of an individual recipient on your list.
   - To switch between extensions and names, press ⎡*⎤ ⎡A⎤.
9. Press ⎡#⎤ to signal that you have entered the address (i.e., extension or name).
10. Repeat steps 8 and 9 until your mailing list is complete.
11. Press ⎡*⎤ ⎡#⎤ to tell the AUDIX system that you have finished creating the list.
12. Choose one (1) of the following activities, according to your needs:
    - To create another mailing list, repeat steps 5 through 11.
    - To return to the Activity Menu, Press ⎡*⎤ ⎡R⎤.
    - Hang up.

Mailing Lists $\boxed{\begin{array}{c} \textit{JKL} \\ \textbf{5} \end{array}}$

b)   Using a Mailing List to Address a Message

You can use Mailing Lists and individual extensions when addressing the same message. Whether you're creating a new message, responding to an incoming message, or resending a filed message, you can address it with a list.

To address a message with a Mailing List (after you have created the list), do the following:

1. Log into the AUDIX system.

2. Create a message (see the procedure for *Recording a Voice Mail Message* found on page 2-7 of this manual) and approve it by pressing ⎡ * ⎤ ⎡ # ⎤.

3. Press ⎡ * ⎤ ⎡ L ⎤ to tell the AUDIX system that you're about to enter a list as the address.

4. Enter the list owner's extension and press ⎡ # ⎤. If you own the list, you may simply press ⎡ # ⎤.

5. Enter the list ID number.

6. Press ⎡ # ⎤ to signal that you have entered the list ID.

7. Take one of the following actions, according to your needs:
   - To address this message using more lists, repeat steps 3 through 6.
   - To send this message to others not on the list, add the addresses (extension) of individual recipients and press ⎡ # ⎤ after each entry.
   - To tell the AUDIX system that you have finished addressing the message, press ⎡ * ⎤ ⎡ # ⎤.

8. Press ⎡ * ⎤ ⎡ # ⎤ if you want your mail to be delivered immediately. If you prefer to schedule the message for future delivery, skip this step and follow the procedure described in the *Delivery Scheduling* section on page 2-8.

c)   Reviewing and Modifying a Mailing List

After creating and approving a Mailing List, you can return to the Administer Mailing List activity at any time to review or modify your list. You can modify your own list by adding individual recipients or deleting former recipients. You can also change the status of your list, designating it as either public or private.

To review and/or modify your list, do the following:

1. Log into the AUDIX system.

2. Press ⎡ 5 ⎤ to Administer Personal Options.

3. Press ⎡ 1 ⎤ to Administer Mailing Lists.

4. Press ⎡ 3 ⎤ to review and/or modify your list.

5. Enter the Extension (address) of the subscriber who owns the list you want to review.

6. Press ⎡ # ⎤ to signal that you have entered the address.

   If you own the list, you may simply press ⎡ # ⎤.

7. Enter the list ID number.

8. Press ⎡ # ⎤ to signal that you have entered the ID.

   The AUDIX system will tell you how many names are on the list and read the first name to you. At this point, you can skip or delete each name as it is read, or you can add a recipient to the list.

<table>
<tr><td>

JKL 5

</td><td>

Mailing Lists

</td></tr>
</table>

9. Take one of the following actions, according to your needs:
   - *To add a name to this list* (note: you must own the list):
     a. Press ☐1 to add a name to this list or to change the status of the list.
     b. Press ☐Y (for yes) to change the status of your list from its current status (public or private) or press ☐N (for no) to leave the status unchanged.
     c. Enter the new address (extension or name).
        To switch back and forth between extension or name addressing, press ☐* ☐A.
     d. Press ☐# to signal that you have entered the new address.
     e. Repeat steps 'c' and 'd' if you want to add more than one new recipient to this list.
     f. Press ☐* ☐# to tell the AUDIX system that you've finished addressing.
   - *To review the names in this list:*
     a. Press ☐* ☐1, to listen to names from the beginning of list.
     b. Press ☐# to skip (and retain) the name on the list.
   - *To move backwards to previous entries in this list:* simply press ☐2 each time you want to step backwards one name.
   - *To delete a name from this list:*
     a. Listen to the name.
     b. Press ☐* ☐D to delete the name.
        When you delete a name, the AUDIX system automatically skips to the next name on the list.

10. Take one of the following actions, according to your needs:
    - To review this list from the beginning: press ☐* ☐1.
    - To indicate that you are finished reviewing this list, press ☐* ☐#.
    - Hang up.

11. When you have finished reviewing or modifying Mailing Lists, take one of the following actions, according to your needs:
    - To return to the Activity Menu: Press ☐* ☐R.
    - Hang up.

Mailing Lists $\boxed{\begin{array}{c} \textit{JKL} \\ \mathbf{5} \end{array}}$

d)   Scanning a Mailing List Summary

If you want an overview of your Mailing Lists, you can ask the AUDIX system to summarize them for you. The AUDIX system will identify each of the lists that you own, the number of subscribers on the list, and whether the list is public or private. As each list is summarized, you can ask the AUDIX system to review the recipients on the list, or you can skip to the next list. While scanning your list summary, you can delete existing lists, *but* cannot add new ones.

To hear a summary of all your lists, do the following:

1. Log into the AUDIX system.

2. Press ⑤ to Administer Personal Options.

3. Press ① to Administer Mailing Lists.

4. Press ② to Play a Summary of Your Lists.

   The AUDIX system will identify the list, number of members, and status (public or private).

5. Take one of the following actions, according to your needs:
   - To skip to the next list: press ⌗ .
   - To delete the list: press ✳ Ⓓ .
   - To rewind to the previous list, press ② .
   - To review the members on the list: press ⓪ .

If you choose to review the members on the list, you can skip, delete, or add members by following step 9 under Reviewing and Modifying a Mailing List, found earlier in this section on page 2-21. When you finish reviewing or modifying your list, press ✳ ⌗ .

PRS		
7	**Scan Messages**	

Scan Incoming Headers and Messages	**1**
Scan Headers Only	**2**
Scan Messages Only	**3**

Automatically Scan Incoming Messages

The Automatic Message Scan is a time-saving feature that allows subscribers to scan all headers and/or messages at the touch of 2 buttons. This feature is especially convenient for those subscribers who are in a hurry or are using cellular telephones while driving.

To access the Automatic Message Scan feature, the user simply presses [7] at the Activity Menu. Users are then prompted to select the mode of scanning:

*   Headers and Messages

*   Headers Only

*   Messages Only

Once the scanning begins, the AUDIX system will *not* prompt the subscriber to replay, delete, respond to or forward the message. The AUDIX system will automatically play each header and/or message. There is a 3 second pause between each message and/or header to allow subscribers to press any of the normal scan buttons, such as [0] to replay and [*] [D] to delete the message. All messages that are scanned, but not deleted, will be placed in the "Old Messages" category.

To Automatically Scan Messages, simply do the following:

1. Log into the AUDIX system.
2. Press [7] at the Activity Menu to Select Automatic Message Scan.
3. Choose one of the following:
    *   Press [1] to listen to headers and messages;
    *   Press [2] to listen to headers only;
    *   Press [3] to listen to messages only.

The AUDIX system will:

   a. Play each header and/or message;

   b. Indicate end of the message;

   c. Pause 3 seconds;

   d. Indicate the start of the next header and/or message.

Video Teleconferencing Information

Introduction

The AICPA maintains video conferencing equipment at each of its three offices for the use of employees and committee members for conducting official AICPA business. This equipment is located in conference rooms that are best able to support video conferencing. Video conferences may be scheduled between AICPA facilities, and between AICPA offices and similarly-equipped systems at other locations. A nationwide directory of rentable video facilities is included at the rear of this section. To schedule a video conference at one or more of these facilities, contact the AICPA Telecom Helpline at ext. 3800.

Scheduling

To schedule a video conference, complete an electronic meeting request form for each AICPA facility that will take part in the video conference. The Institute's meeting request system can be accessed via the AICPA Local Area Network. Once the required reservation forms have been completed, the Meetings department will issue a confirmation. It is important that this confirmation be received prior to notifying conference attendees.

Due to the heavy demand of our video conference facilities, and because of the unique pre-conference testing requirements of some off-premise video equipment, it is necessary to reserve the video facilities a minimum of five business days in advance.

Video conference facilities should be reserved as half-day sessions. These sessions are defined as morning (8:30 AM–12:30 PM) and afternoon (1 PM–5 PM). A user may reserve either morning, afternoon, or both.

Video Conference Basics

Confirmed video conferences between two (2) AICPA facilities can be dialed by users following the instructions provided in the section entitled "Making a Video Call" on page 3-2. Conferences between three or more, or off-premise, locations must be dialed with assistance from a Video Assistance Team member.

The video conference equipment consists of five primary units. These are: the main video unit, the video monitor unit (optional), the microphone, the camera, and the remote control. The video camera is located on top of the main video unit. Aside from this difference, the main video unit and the video monitor unit appear to be nearly identical. The main video unit also houses the storage space for the microphone and the remote control units. This space is located in the drawer in the cabinet beneath the monitor of the main video unit.

Turning on the Power

To turn on the video conference equipment, flip the power switch that is located on the left rear area of the main video unit. When the power is first turned on, the video unit will perform a number of self-diagnostics, the results of which will be displayed on the monitor of the main video unit. This process takes approximately three minutes. After this process the monitor should display the message "PICTURETEL READY". If the monitor is blank, and has not displayed the results of the diagnostic tests, but the equipments sounds as if it is powered up, check to be sure the small black power button on the front of the monitor is on.

To turn on the video monitor unit, press the small black power button on the front of the monitor.

Setting up the Microphone

The microphone is a black, flat-bottomed, humpbacked disk, that is stored in the drawer beneath the video monitor on the main video unit. The microphone should be placed on the conference room table so as to be centrally located among the conference attendees, before the conference begins. The

microphone is sensitive enough to pick up all spoken voices, including whispers, and should not be moved around the room while the conference is in progress.

Camera Information

The camera is located on top of the main video unit and may NOT be moved from that location. The camera unit is of the very highest quality and is designed to move quickly and quietly. NEVER attempt to move the camera by hand or hold it from moving. Doing so will damage the camera.

Placing the Remote Control

Each video conference system has a remote control unit that is stored in the drawer inside the main video unit. Once the main unit has been powered up, all subsequent conference control functions are performed via the remote control. To use the remote, carefully remove it from the drawer and place it on the table in the middle of the room. The remote control works using infra-red signaling just like the remote control used by home television sets, and must have a clear path between it and the base of the camera unit on top of the main video unit, where the infra-red receiver is located. If this "line of site" path is blocked, or if the remote is too far away from the receiver (over 25 feet), the remote control unit will not function properly.

Placing a Two-Way Video Call

To make a 2-party video call to another AICPA facility, you must first follow the directions above for turning on the power, placing the microphone and the remote control. Please ensure that the video equipment at the receiving location has also been turned on.

To place a video call:

1) Press the green CALL/ADD button. The screen will display the "Dialing Directory" menu.

2) Select the AICPA facility you wish to call using the arrow-shaped "CHOOSE" keys. Then press "ENTER".

3) The screen will display the status of the call being dialed. It takes approximately one minute for the dialing sequence to complete. If the screen displays the message, "unable to dial", contact the Telecom Helpline at *ext. 3800* for immediate assistance.

4) Once your video call is connected, you may then use the "CAMERA ZOOM" and "PAN", "MUTE", "VOLUME", "PIP" (picture in a picture) control buttons on the remote control.
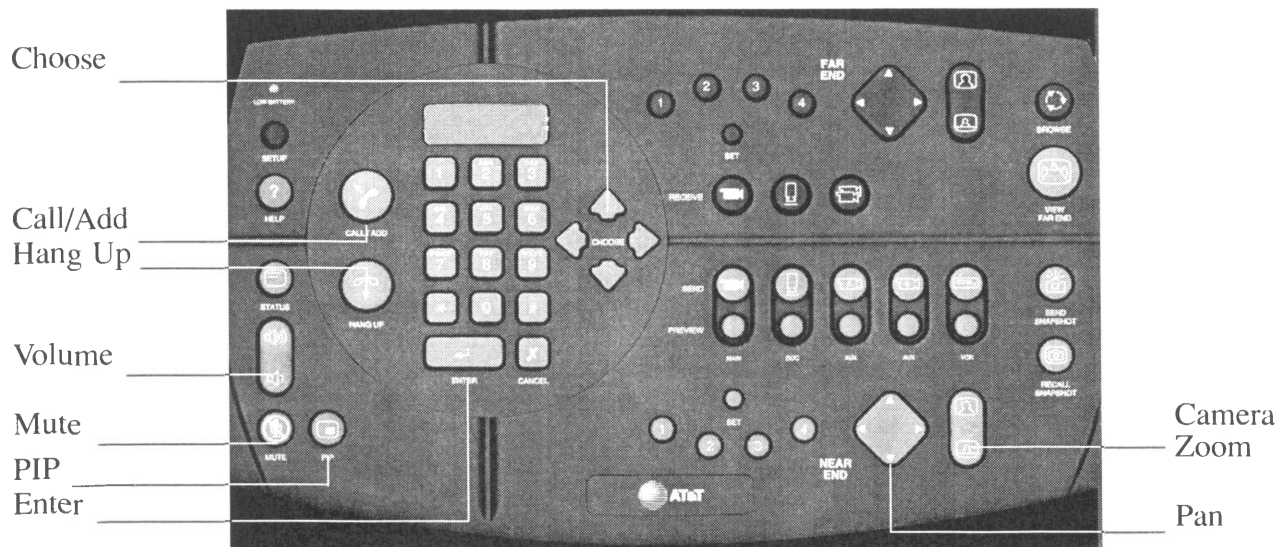
5) To end your video call, press "HANG UP"

For more information about AICPA's Video Teleconferencing Program, call the Telecom Helpline at *ext. 3800.*