U.S. Department of Homeland Security

United States Coast Guard

IT "C" School

Unit 6 - CallPilot Administration

CallPilot Overview – CallPilot Manager – CallPilot Configuration Wizard – Mailbox Classes – User Templates – Archiving and Restoring Resources – Service Directory Number (SDN) – Maintenance Menu – Messaging Management – System Prompts and Greetings – Remote Notification –Database Administration – Application Builder

STUDENT GUIDE

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Prepared for: IT-C School

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Notice to Students

Purpose: This course will provide training on Nortel CS1000E PBX installation, programming, troubleshooting and maintenance. The graduate of this course will possess the skills necessary to install and maintain a CallPilot Voice Processing System.

IMPORTANT NOTE: This text has been compiled for TRAINING ONLY. It should NOT be used in place of official directives or publications. The text information is current according to the references listed.

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Lesson 1

CALLPILOT INSTALLATION

Overview

Overview

In this lesson you are introduced to the different CallPilot hardware platforms and will be configuring the Call Sever in preparation for CallPilot configuration. This lesson provides you with the key knowledge elements of the CallPilot System. An activity at the end of this lesson tests comprehension of the key knowledge elements that you'll need to perform for upcoming tasks.

Performance Objectives

Upon successful completion of this lesson, you will be able to

7.1 **PROGRAM** Automatic Call Distribution using Command Line Interface (CLI) with 100 % accuracy..

- **7.1.1** **REVIEW** manufacturer's documentation
- **7.1.2** **DETERMINE** customer configuration
- **7.1.3** **COMPLETE** unit documentation

7.2 **VERIFY** Call Server IP configuration using Command Line Interface (CLI) and Element Manager (EM) with 100% accuracy.

- **7.2.1** **REVIEW** manufacturer's documentation
- **7.2.2** **DETERMINE** customer configuration
- **7.2.3** **COMPLETE** unit documentation

Performance Evaluations

There are no performance evaluations for this lesson.

Overview, continued

References

The information in this lesson can be found in the following reference:

Northern Telecom Publications (NTPs) is the documentation for the CS1000E system. These publications provide reference tools and information that is related to the various features and options of the system.

Document	Document #
Communication Server 1000 Software Input Output Administration	NN43001-611
CallPilot Administrator's Guide	NN44200-601
Communication Sever 1000 and CallPilot Server Configuration	NN44200-312

Tools and Equipment

The tools and equipment used for this lesson are:

- CallPilot Server
- Call Server

Job Aids

There are no job aids for this lesson.

Handouts

There are no handouts for this lesson.

Key Terms

Review the following key terms before you begin the reading assignment.

Term	Definition
ACD	Automatic Call Distribution is an Call Server feature that receives incoming calls, places them in queues, and then routes them to the next available agent. Calls are evenly distributed to all agents who are currently logged in.
ACD Agent	An agent of an ACD group programmed in the switch to serve a particular multimedia channel.
Application Builder	The software application that supports the creation and administration of voice menus, announcements, Thru-Dial services, fax information services, and time-of-day services.
ASR	Automatic Speech Recognition.
Bandwidth	The maximum data-carrying capacity of a network.
CLAN	A Customer Local Area Network is the customer TCP/IP (Transmission Control Protocol/Internet Protocol) data network used to connect administrative, unified messaging PCs. It also transports Voice Profile for Internet Mail (VPIM) and supports Simple Network Management Protocol (SNMP). It connects web-based PCs to the server for system administration.
CDN	A Control Directory Number is a special DN, to which no agents are assigned, created to provide call queuing and routing to CallPilot services.
Data Link	Data Link carries call information (called number, caller's number). The Data Link in CallPilot is called ELAN, and it establishes a connection between the Option 11 (SSC Card) and the CallPilot server.
Desktop Messaging/Unified Messaging	This feature allows users to create and receive CallPilot messages from their PCs. Voice messages can be played back and recorded on the PC. Fax messages can be directly downloaded and viewed on the PC or auto printed to a fax machine.
DFDN	Local Default DN is a Meridian 1 software feature that allows calls to the CDN (Control DN) to be rerouted to a pre-defined ACD DN if the host computer (in this case CallPilot) goes down.
	Continued on next page

Overview, continued

Key Terms, contd.

Term	Definition
DS0	Digital Signal Channels carry digital voice, fax, and speech recognition data from the switch to the server. These channels use DS0 links, either along the backplane or on cables between the switch and the server.
DSP	Digital Signal Processors are programmed in CallPilot to provide voice recording and playback, fax reception and transmission, and speech recognition service. One DSP can support a number of concurrent calls (dependant on services requested).
ELAN	Embedded Local Area Network is a private Ethernet (10base-T) LAN dedicated to connecting the switch and the server. It provides real-time call control to system.
FQDN	A Fully Qualified Domain Name is composed of the Host name and the Domain name,
IMAP	Internet Message Access Protocol allows a client to access and manipulate electronic mail messages on a server.
LAN	A Local Area Network supports high-speed sharing of data and peripheral devices between users within a small geographical area.
LDAP	Lightweight Directory Access Protocol is used to search for and manipulate informational data on a directory server. Searching for specific users, downloading address books, and manipulating current address information are all performed through the LDAP desktop server.
Mailbox	An electronic mailbox is a software storage area where a user's incoming mail (messages), password, and recorded greetings are stored. Access to this stored data is password-protected and requires user login.
MAPI	The Messaging Applications Programming Interface is a computer programming language used to allow CallPilot software programs such as Desktop Messaging to work Microsoft Exchange or Microsoft Outlook.
MGATE Card	The **MGate card** sends the voice and data signals to the MPB boards in the CallPilot server

Continued on next page

Key Terms, contd.

Term	Description
MPUs	Multimedia Processing Units are used to measure multimedia processing power and are incorporated into the operation of the MPC-8. MPUs provide the necessary signal processing to support voice playback, voice recording, tone detection, tone generation, and speech recognition.
Multimedia Channels	A multimedia channel consists of a DS0 channel coupled with one or more Multimedia Processing Units (MPUs). The DS0 channel provides the connection between the switch and the server, and the processing power is provided by the MPUs. The MPC-8 routes all data (voice, fax, and speech recognition) received by the server to the appropriate processing by multimedia channels.
Multimedia Messaging	Voice, fax, and a mixture of voice/fax accessible from a single multimedia mailbox, thus providing a single point of access for both voice and fax messages. Multimedia Messaging software is accessed when the user is calling from a fax phone and wants to print a fax from his/her mailbox, or if the user wants to scan a fax into their mailbox.
MWI	The Message Waiting Indicator is optionally used to notify a user that either a new message has been received, an urgent message is waiting, or that the user has a new unsent message. The indicator is typically a flashing light, although stutter dial tone is also available.
Personal Distribution List	This is an address list that is owned and maintained by a mailbox user.
Personal Verification	This feature identifies the originator, through a voice message, to the recipient when they retrieve your message via telephone.
Phantom DN	Virtual phone numbers assigned to phones that only exist in software. Phantom DNs can be used in CallPilot configuration.
Remote Notification	This feature allows a user to be notified at a remote location when a new CallPilot message is added to their mailbox.

Continued on next page

Overview, continued

Key Terms, contd.

Term	Definition
SDN	A Service Directory Number is assigned to a service to make it both accessible and operational.
Service	A service is any feature of CallPilot currently assigned. If assigned, Voice Messaging and Fax Express Messaging are both considered to be a service of CallPilot.
Shared Distribution List	A list of addresses maintained by the system administrator and shared by all users.
Speech Activated Messaging	A service of CallPilot that allows the user to activate commands with spoken words from a telephone. Access to voice and fax messaging, along with response to these messages, can be speech-activated.
TAPI	Telephony Application Programming Interface (a Microsoft feature) allows a computer to interact with the switch. It also allows multiple applications to access a single switch.
Rack-Mounted Server	Rack-Mounted Servers are completely external to the switch and connect via DS30 cables and MGATE cards. The model numbers for the rack-mounted servers are 600r and 1005r.
TN	Terminal Number is the hardware address of an ACD (Automatic Call Distribution) agent that is currently programmed in the switch. A TN consists of four elements: Loop, Shelf, Card, and Unit. In an Option 11 switch only card and unit are used.
TSP	TAPI Service Provider is the name given to the Nortel Networks TAPI driver for Nortel PBX switches. The TSP controls the Embedded LAN (ELAN) link, as well as connectivity to the switch over TCP/IP and Ethernet Protocols.
Unified Messaging	This is a single solution for managing many types of information; including voice messaging, fax messaging, electronic mail, image, and video (also referred to as *Integrated Messaging*).
Voice Call Answering	This feature consists of the system prompts and options offered to an incoming caller from the CallPilot system.
Voice Messaging	Recording, storing, playing, and distributing phone messages.
	End

Lesson Content: CallPilot Overview

Introduction

A phone system that only supports normal voice mail is no longer sufficient in today's fast-paced high-tech world. Voice mail users require a system that can manage many types of information quickly and efficiently, and present the information readily on demand. CallPilot is Nortel Network's multimedia messaging system designed to meet these 21st-century telecommunications requirements.

Utilizing industry-standard hardware and standard operating systems, CallPilot provides a single solution that manages unified messaging incorporating voice mail, email, and fax-mail with great efficiency. Due to security issues, however, the Coast Guard is currently only using the Voice Mail functionality of CallPilot.

The user can access a wide range of communications media quickly and efficiently. Media such as the telephone, wireless sets, desktop computers, the Internet, Speech Activated Messaging, Fax, and AUIs (Alternate User Interfaces) are available to the user 24/7 from their desktop.

CallPilot Manager (CallPilot administration suite) lets you use a web browser to administer and configure the CallPilot System. It is a complete Web-based replacement of the GUI-based administration client and configuration wizard used in CallPilot release before Release 2.0, except for the Application Builder function. Application Builder remains a GUI application.

This module will introduce you to CallPilot, its basic structure, its capabilities, and the terminology (language) that supports it.

CallPilot Features

The CallPilot functional capabilities are as follows:

- Voice Mail
- Voice Messaging & Express Voice Messaging
- Fax Messaging & Express Fax Messaging
- Fax Call Answering
- Multimedia Messaging with Integrated Voice and Fax
- Speech Activated Messaging
- Desktop Messaging
- Web Messaging

CallPilot Software

For all Nortel Meridian 1 (CS1000E or CS1000M) systems, CallPilot Release 5.0 software is typically factory installed on the CallPilot server.

Lesson Content: CallPilot Hardware

Introduction

CallPilot has several different hardware configurations dependant on the type of switching system it's connecting to and the capacity of the server required. Nortel offers two separate 'Hardware Platforms' to support the CallPilot system. Each platform is unique, and the hardware therefore is different. These two 'Hardware Platforms' will be discussed next.

IPE Platform

The CallPilot IPE Platform is a server built on an IPE (Intelligent Peripheral Equipment) circuit card and takes up two slots of the Option 11 cabinet. This card is only designed to work in the Meridian 1 PBX (CS1000E and CS1000M) switches. This two-slot card can be installed in any two adjacent slots from 1 through 9 (not permitted in slots 0 or 10). The server's DS0 channels connect to the switch via the backplane.

Rack-mount Platforms

Rack-mounted Platforms are also an available option through Nortel in support of the CallPilot server platform. Rack-mount servers can be connected to the PBX with separate ELAN and DS30X digital link connections.

Nortel offers two distinctly different types of rack-mount platforms. The first is the 600r, a midrange capacity multimedia telephony server. The 600r offers higher feature capacities than the IPE platform discussed previously.

Nortel also offers a high-end capacity multimedia telephony server. The 1005r is a high-availability, high redundancy rack mounted CallPilot server that resides external to the switch cabinet. This server provides dual drives, dual power supplies and dual cooling fans for redundancy.

Lesson Content: CallPilot Hardware, continued

CallPilot 202i

The most current version of the IPE Platform is the CallPilot 202i server. The 202i is the low-end capacity range server and is designed to integrate with Nortel Networks Meridian 1 products. When locked into position in the cabinet, the 202i receives all power and communication through connections on the cabinet backplane.

The server's motherboard provides a communications interface with the PBX for both voice and data via an Ethernet network connection. Two Ethernet controllers housed on the servers' motherboard support this communications link. Both the embedded LAN (ELAN) and the Customer LAN (CLAN) interface through this Ethernet link.

The 202i keycode capacities are as follows:

- 350 storage hours
- 32 channels
- 32 DSP MPUs
- 8,000 mailboxes
- 3,000 voice mail only users
- 6 voice prompt languages
- 3 speech recognition languages

Lesson Content: CallPilot Hardware, continued

202i Faceplate

Below is a diagram of the 202i Faceplate, on the next page will be a description of all the highlighted features.

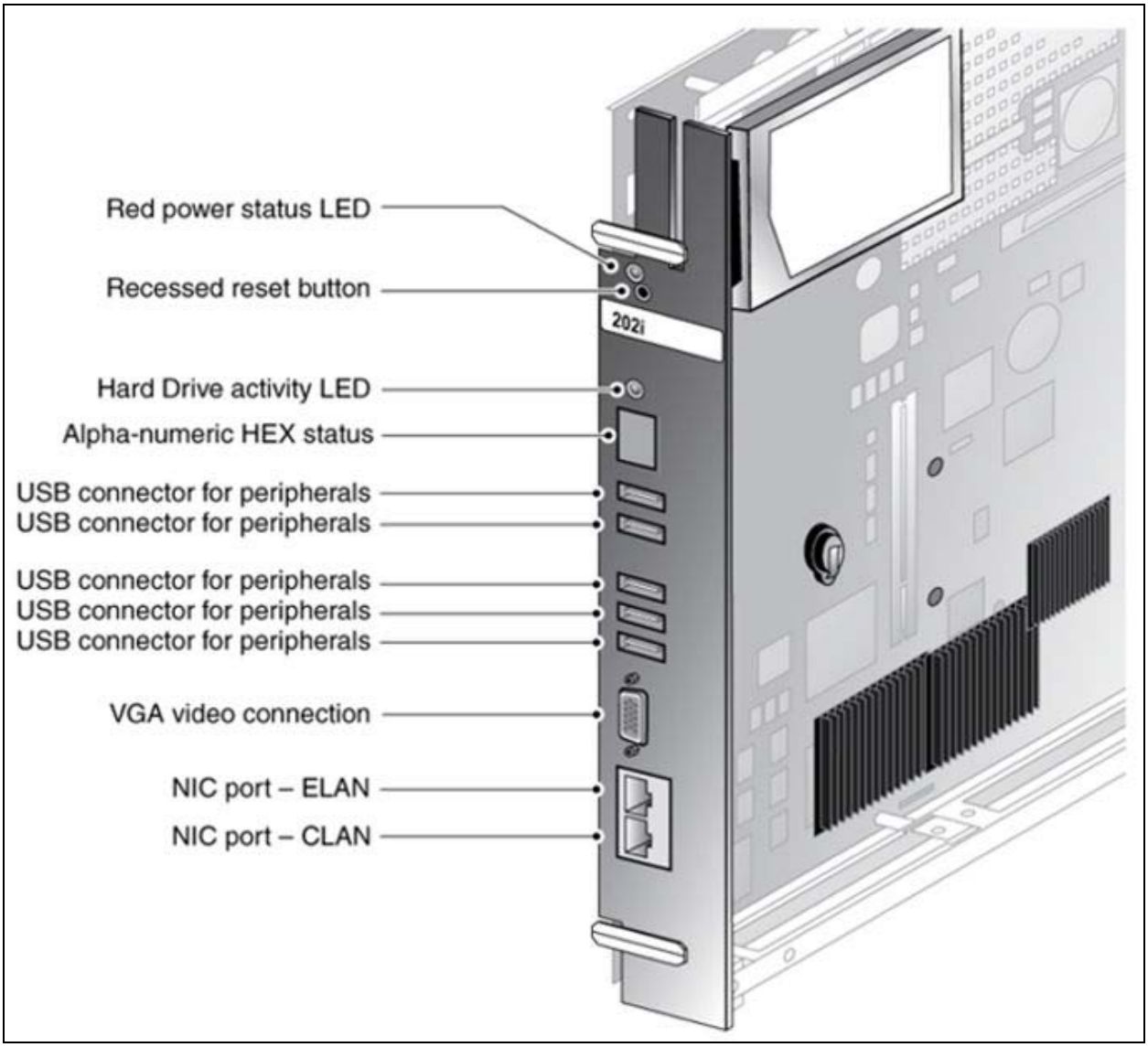

Figure 6.1.1: 202i IPE Platform CallPilot Server

Lesson Content: CallPilot Hardware, continued

202i Faceplate

The following table describes each faceplate feature, highlighted on the previous page.

Faceplate feature	Description
Latches	Latches at the top and bottom of the faceplate secure the server to the backplane of the Meridian 1 switch or to the backplane of the Communication Server 1000 Media Gateway Expansion.
Red power status LED	The red power status LED indicates two server states: • the completion of self-test diagnostics • when it is safe to remove the server from the Meridian 1 switch or Communication Server 1000 Media Gateway Expansion
Hard drive activity LED	Indicates hard disk read or write activity
Reset button*	Use the recessed reset button to manually restart the 202i server when the operating system is up without disconnecting the server from the backplane.
Alphanumeric Hexadecimal (HEX) display	The four-digit LED-based display provides feedback about the current status of the server, including fault conditions.
USB ports	Five USB 2.0 ports (maximum 500mA for each port).
VGA video connection	This connector provides standard DB15 video connection
NIC port - ELAN	This connector provides an Ethernet connection between the 202i server and the Meridian 1 switch or Communication Server 1000.
NIC port - CLAN	This connector provides a network connection for • user desktop computers to enable use of the unified messaging and fax messaging features • LAN-based server administration
NIC ports with built-in status LED	The upper LED network connector represents network traffic. The lower LED network connection, if illuminated, represents 100 Mb connection. No illumination indicates 10 Mb or no active connection.

***** The reset button is active only when the operating system is operational. Press the reset button only when you cannot shutdown the operating system normally. Once the 202i server has shut down through the Windows Shutdown command, the reset button becomes inactive and there is no impact if it is pressed as it is awaiting shelf removal. Once removed from the shelf, the reset button regains its described functionality.

Lesson Content: CallPilot Hardware, continued

Figure 6.1.2: 600r CallPilot Server

CallPilot 600r

The CallPilot 600r is the new low end multimedia telephony server. It was designed with fewer features and lower capacities than the CallPilot 1005r server with the tradeoff of a simpler installation process and ease of ongoing serviceability. The 600r platform description is as follows:

- A hardened long life Carrier Grade Network Equipment-Building System (NEBS) server
- Industry standard 1U rack mount
- Cost effective alternative to the aging CallPilot 201i IPE server and CallPilot 703t tower server

The 600r keycode capacities are as follows:

- 1200 storage hours
- 96 channels
- 96 MPUs
- 20,000 mailboxes
- 7,000 voice mail only users
- 6 voice prompt languages
- 3 speech recognition languages

Lesson Content: CallPilot Hardware, continued

Figure 6.1.3: 1005r Rack Mount Platform CallPilot Server

CallPilot 1005r

The CallPilot 1005r rack-mount server is the new high-end, high capacity multimedia telephony server. It is designed with increased redundancy features and can be implemented in a high-availability solution. The 1005r platform description is as follows:

- A hardened long life Carrier Grade Network Equipment-Building System (NEBS)
- Industry standard 2U rack mount

The 1005r keycode capacities are as follows:

- 2400 storage hours
- 96 or 192 channels*
- 96 or 288 MPUs*
- 15,500 mailboxes
- 15,000 voice mail only users*
- 6 voice prompt languages
- 3 speech recognition languages

* Engineering maximum for High Capacity feature

Lesson Content: Call Server Configuration

Introduction

Proper operation of the CallPilot system is dependent upon a specific Call Server configuration. Several software provisions (changes) are required to support CallPilot implementation. Configure your CallPilot system using the configuration process below. Your instructor will provide instruction on each step of the process.

Step	Action
1	Provision the Embedded LAN (ELAN) subnet link in LD 17
2	Provision the VAS (Value Added Server) in LD 17
3	Configure the CS1000E IP address in LD 117 if needed
4	Enable the ELAN in LD 48 and the Ethernet Link interface in LD 137
5	Ping the CallPilot via the ELAN
6	Define CallPilot in the Customer Data Block with the CPA and MCI options enabled
7	Define the default ACD DN in LD 23.
8	Configure the ACD queue to hold the agents that service CallPilot
9	Configure the ACD agents in LD 11.
10	Configure the CDN (Control DN) for Voice Messaging in LD 23.
11	Program dummy ACD DNs in LD 23.
12	Provision the user phone sets in LD 10 and 11.
13	Save configuration changes in LD 43 (EDD).
End of procedure	

Practice Activity: Call Server Configuration

Directions Complete Work Orders 22-24 as directed by your instructor.

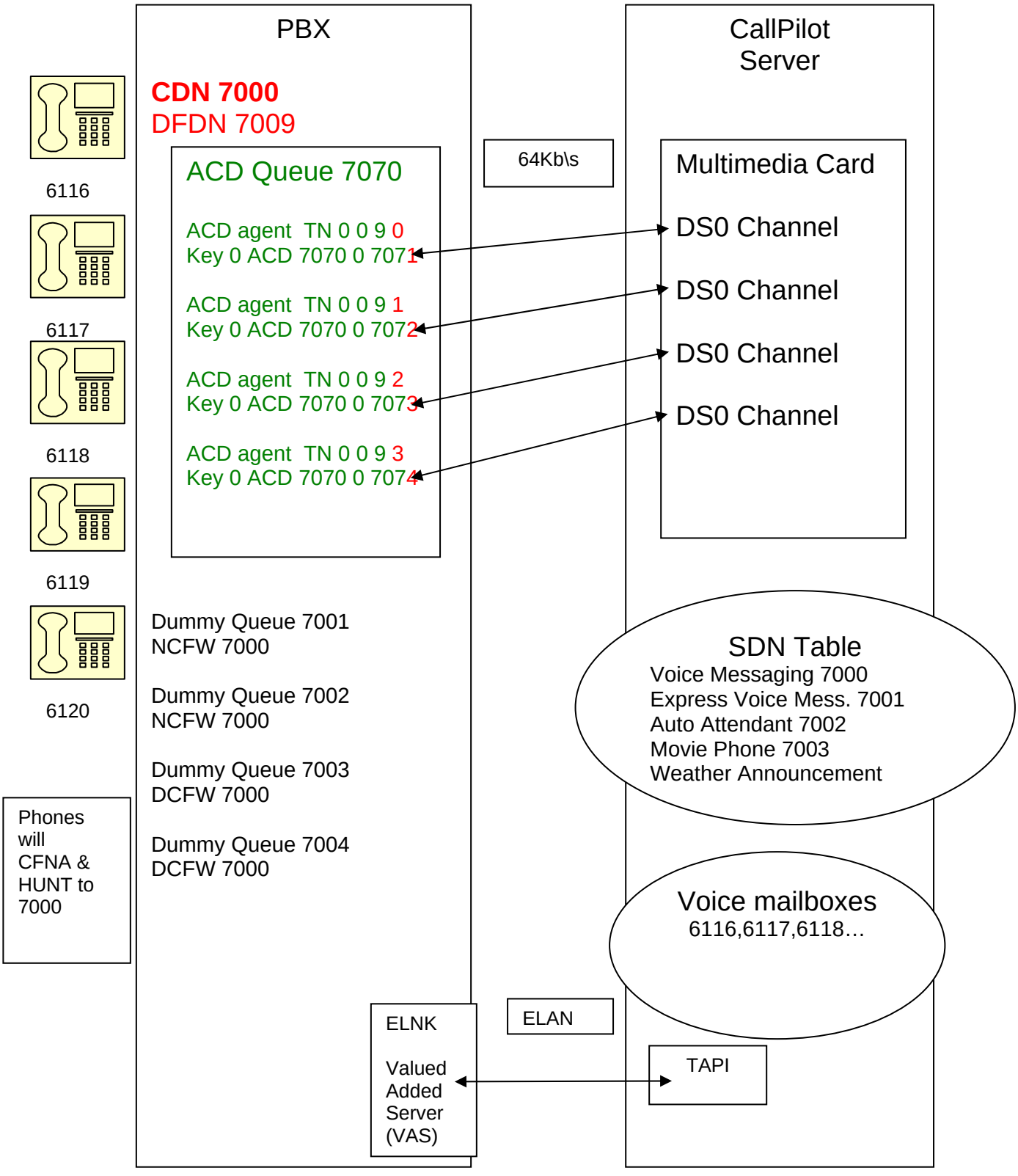

Figure 6.1.4: CallPilot Hardware Block Diagram

Lesson Review: CallPilot Hardware

Directions

Answer the following questions using the information from this lesson to assist you.

Questions

1. What are the two types of hardware platforms that support the Call Pilot system?

   _____

   _____

2. The acronym IPE stands for what?

   _____

   _____

3. The current IPE platform is the CallPilot _____ server?

   _____

   _____

4. How is the 1005r redundant?

   _____

   _____

5. The CPPM card houses two Ethernet controllers that are used to establish a network interface with both the ELAN and CLAN?

   A. True
   B. False

6. The 201i is an IPE platform server that occupies two slots of an IPE shelf.

   A. True
   B. False

7. DS0 channels establish a communications link between the 201i CallPilot server and the PBX switch through cabling interface.

   A. True
   B. False

8. Rack mount servers connect to the PBX using what type of IPE card?

   _____

   _____

Lesson Review: CallPilot Overview

Questions

1. What is the name of the multimedia messaging system designed by Nortel to provide and manage unified messaging?

   _____

   _____

2. In reference to the previous question, what function(s) of this system are currently being used by the Coast Guard?

   _____

   _____

3. Name three components of CallPilot?

   _____

   _____

   _____

4. Which of the following are NOT functional capabilities of CallPilot? There may be more than one correct answer.

   A. Speech Activated Message
   B. Ethernet Messaging
   C. Multiple Access Unit Messaging
   D. Web Messaging

5. Voice and Fax Messaging are part of Unified Messaging and are only available to the user from their desktop computer.

   A. True
   B. False

Summary

Lesson Summary

In this lesson, you were introduced to CallPilot Manager. Upon completion of this student guide and after the lesson presentation and practice exercise, you should be able to:

7.1 **PROGRAM** Automatic Call Distribution using Command Line Interface (CLI) with 100 % accuracy.

- **7.1.1** **REVIEW** manufacturer's documentation
- **7.1.2** **DETERMINE** customer configuration
- **7.1.3** **COMPLETE** unit documentation

7.2 **VERIFY** Call Server IP configuration using Command Line Interface (CLI) and Element Manager (EM) with 100% accuracy.

- **7.2.1** **REVIEW** manufacturer's documentation
- **7.2.2** **DETERMINE** customer configuration
- **7.2.3** **COMPLETE** unit documentation

LESSON 2

CALLPILOT MANAGER

Overview

Overview

In this lesson, you are introduced to logging onto and navigating CallPilot Manager, as well as configuring CallPilot Manager using the Configuration Wizard. This lesson provides you with the key knowledge elements of the CallPilot System. An activity at the end of this lesson tests comprehension of the key performance elements that you need to perform for upcoming tasks.

Performance Objectives

Upon successful completion of this lesson, you will be able to:

7.3 **ESTABLISH** CallPilot Server network connectivity using CallPilot Manager and CallPilot Configuration Wizard with 100% accuracy as evidenced by a positive function check.

- **7.3.1** **REVIEW** manufacturer's documentation
- **7.3.2** **DETERMINE** customer configuration
- **7.3.3** **PERFORM** function check
- **7.3.4** **COMPLETE** unit documentation

7.4 **PROGRAM** phones for voicemail access using Command Line Interface (CLI) and Element Manager (EM) with 100% accuracy as evidenced by a positive function check.

- **7.4.1** **REVIEW** manufacturer's documentation
- **7.4.2** **DETERMINE** customer configuration
- **7.4.3** **PERFORM** function check
- **7.4.4** **COMPLETE** unit documentation

References

The information in this lesson can be found in the following reference:

- CallPilot Administrator's Guide—NN44200-601_01.21

Tools and Equipment

The tools and equipment used for this lesson are:

- CallPilot Server
- Call Server

Overview, continued

Job Aids

The job aids for this lesson are:

- How to Access CallPilot Manager

Handouts

There are no handouts for this lesson.

Key Terms

Review the following key terms before you begin the reading assignment.

Terms	Definitions
Application Builder	Application Builder is the CallPilot environment for the creation and administration of voice menus, announcements, Thru-Dial services, fax information services, and time-of-day services.
Configuration Wizard	The Configuration Wizard lets you configure the CallPilot software. You can rerun the Configuration Wizard to update or review the server configuration. Only individuals with Configuration Wizard administration privileges can access the Configuration Wizard.

Pre-Lesson Work

There is no pre-lesson work for this lesson.

Lesson Content: CallPilot Manager

Overview

CallPilot Manager lets you use a web browser to access functionality to administer and configure the CallPilot system. It is a complete web-based replacement of the GUI-based administration client and configuration wizard used in CallPilot releases before Release 2.0, except for the Application Builder function. Application Builder remains a GUI application, launch-able from the Web. This lesson introduces you to CallPilot Manager by defining its uses, explaining how you log on, and discussing other pertinent information to get you started working with the interface.

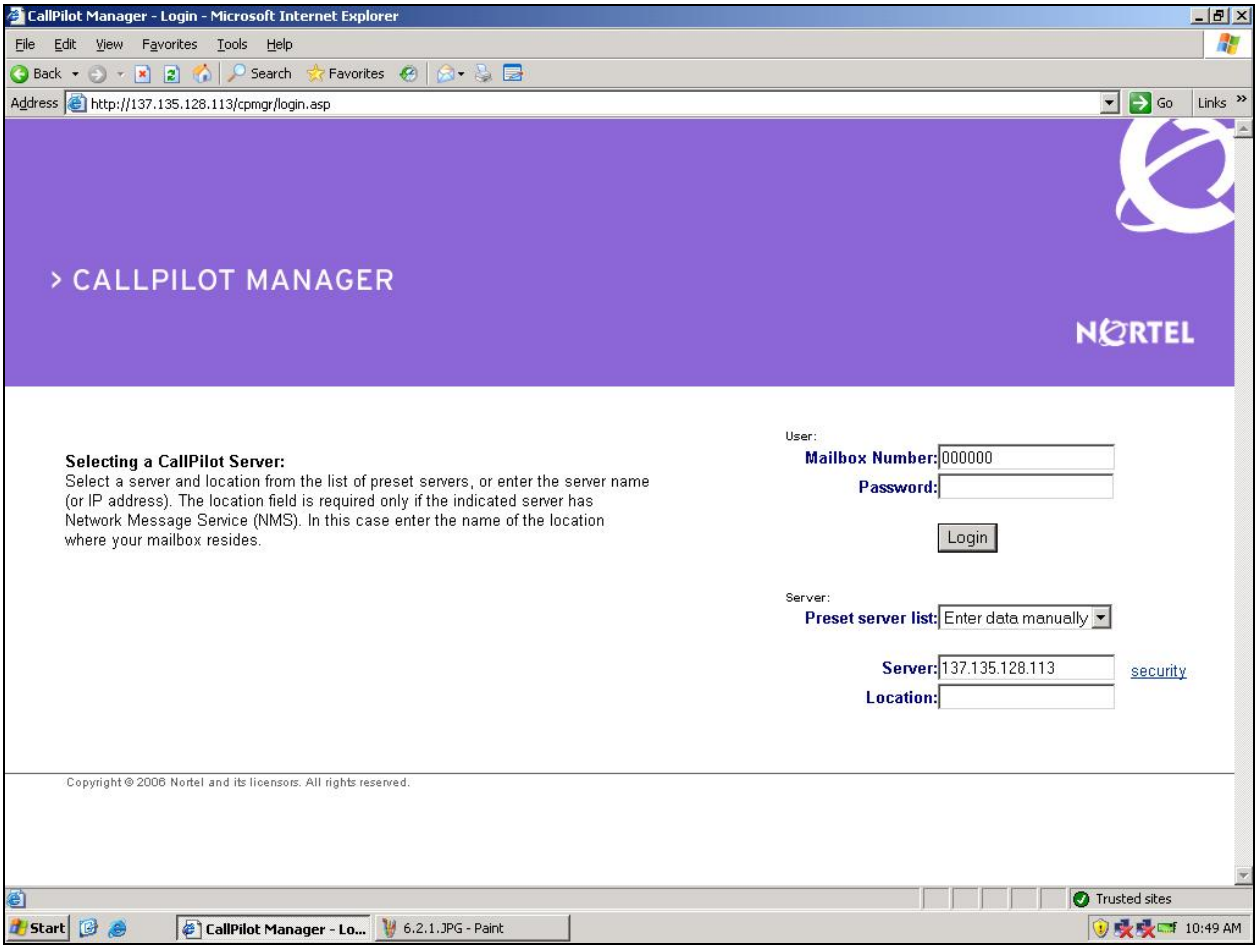

Figure 6.2.1: CallPilot Login Screen

Lesson Content: CallPilot Manager, continued

CallPilot Activities

CallPilot Manager is a web-based application used to connect to a CallPilot server. The connectivity lets you access the functionality used in creating and maintaining the information the server uses to provide CallPilot messaging services for authorized users.

No CallPilot software installation is required on the CallPilot Manager user's PC. From any location, you can use a web browser (on a PC that has network access to the CallPilot Server) for such activities as:

- Delegate administrative privileges.
- Configure and maintain the CallPilot system.
- Set up messaging functionality.
- Add, delete, and modify mailbox users.
- Use shortcuts for Password Reset, Add User, CallPilot Reporter, Application Builder, and the Configuration Wizard.
- Monitor, back up, and restore.
- Access CallPilot Administrator documentation and online Help.

Recommended Configurations

CallPilot Manager is not a keycoded feature. The web server and CallPilot Manager Applications automatically install on the CallPilot server during initial installation of the CallPilot system.

Lesson Content: CallPilot Manager, continued

How to Access and Log into CallPilot Manager

Follow the steps listed below to access the CallPilot Manager Login screen:

How to Access CallPilot Manager	
Step	**Action**
1	Launch a web browser
2	Enter the CallPilot Manager's web address i.e. **http://CPB*x*/cpmgr/** Result: The CallPilot Manager login screen appears.
3	Type the administration mailbox number and password.
4	Do one of the following: From the Preset server list box, choose a server or location from the list of preconfigured servers or locations. In the Server box, type the CallPilot server's host name or IP address.
5	Click Login. Result: The main CallPilot Manager page (the home page) appears.
End of procedure	

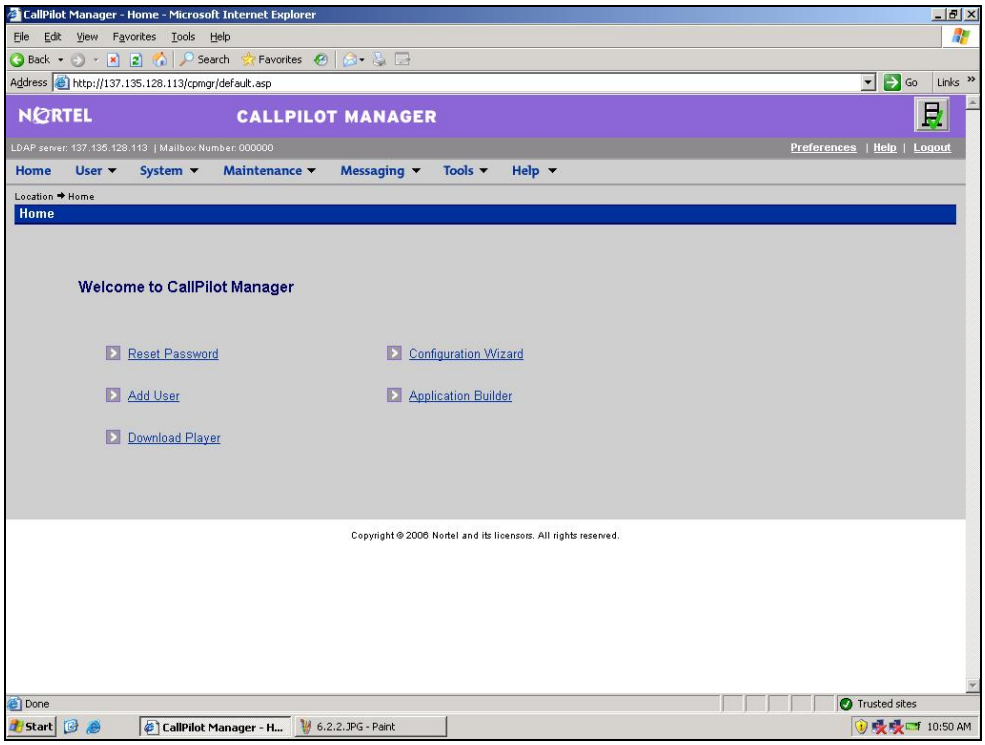

Figure 6.2.2: CallPilot Main Page

Lesson Content: CallPilot Manager, continued

How to Access and Log into CallPilot Manager, contd.

Your user ID and password determine the access that you have to the links, menu items, and menu contents on the CallPilot Manager home page. The access privilege is assigned in accordance with your range of job responsibilities for administering the system. In other words, each administrator has only one password. After the administrator logs in, the system makes available only the parts of the home page that the administrator's access privileges allow.

For example, some administrative users can have view-only access to certain components. In this case, they can view those components, but not make any modifications. Other access levels include the ability to create and delete.

Other administrators can make changes, but cannot create or delete. Some administrators might have no access. You can learn more about setting up and applying access levels in the Setting up Database Administration lesson.

Navigating CallPilot Manager

The CallPilot Manager home page provides a central point of access to your system. From here, you can reach the CallPilot functionality for your administrative tasks, depending on your administrative access privileges.

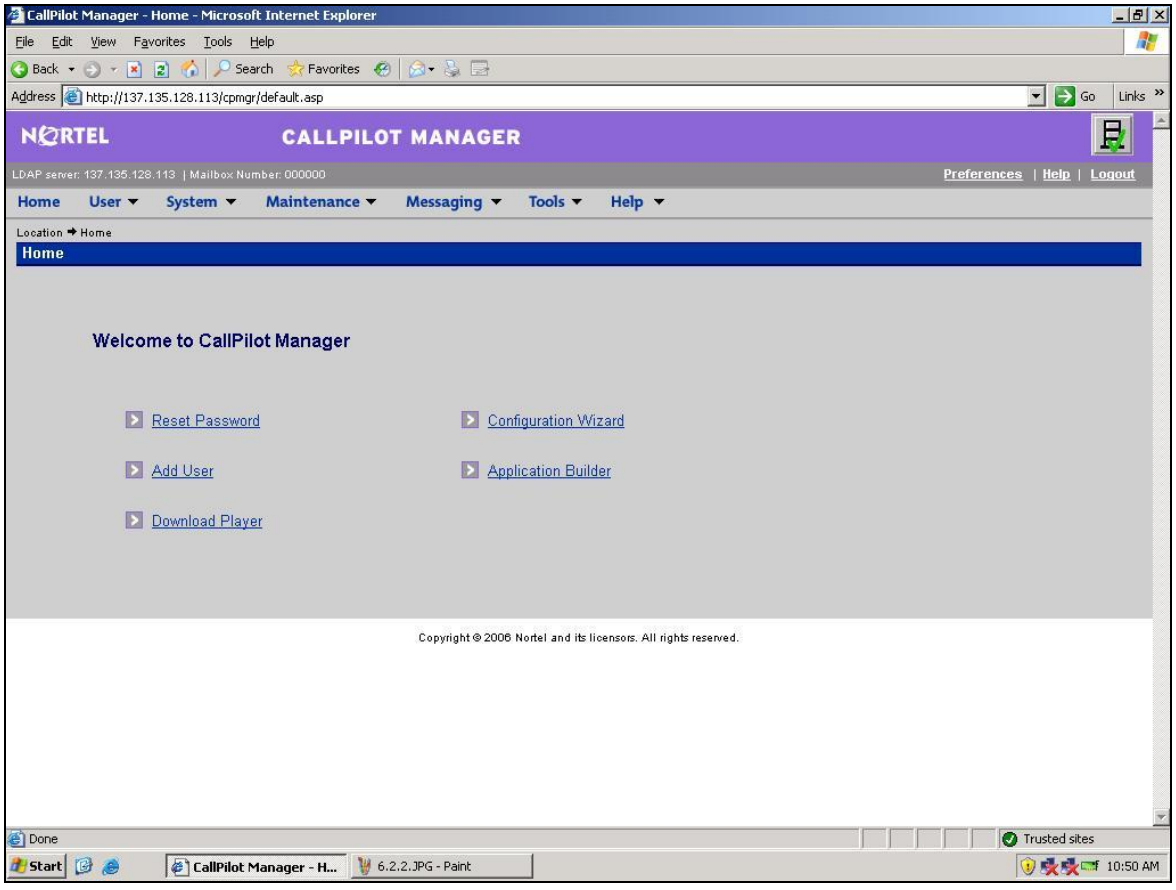

Figure 6.2.3: CallPilot Main Page

Lesson Content: CallPilot Manager, continued

CallPilot Manager Menu

The CallPilot Manager Menu layout is displayed below.

CallPilot Manager Menu					
User Menu	**System Menu**	**Maintenance Menu**	**Messaging Menu**	**Tools Menu**	**Help Menu**
User Search	Server Settings	Maintenance Admin	Messaging Delivery Confirmation	Configuration Wizard	CallPilot Administration Help
Saved User Searches	Backup and Restore	Multimedia Monitor	Message Network Configuration	My CallPilot Configuration	About CallPilot Manager
Add User	Service Directory Number	Channel Monitor	Network Diagnostics	Download Player	
Auto Add	Alarm Monitors		Internet Mail Clients		
Auto Delete	Event Browser		External Email Servers		
Mailbox Classes	Performance Monitor		Messaging Management		
Shared Distribution Lists	OM Configuration		Dialing Information		
User Creation Templates			Holidays		
			Outcalling Administration		
			Restriction Permission List		
			Notification Device Classes		
			System Prompt Customization		
			Security Administration		

Lesson Content: CallPilot Manager, continued

Shortcuts

CallPilot Manager's home page provides links for quick access to common administrative functions. These include the following:

- Reset Password
- Add User
- Download Player
- Configuration Wizard
- Application Builder

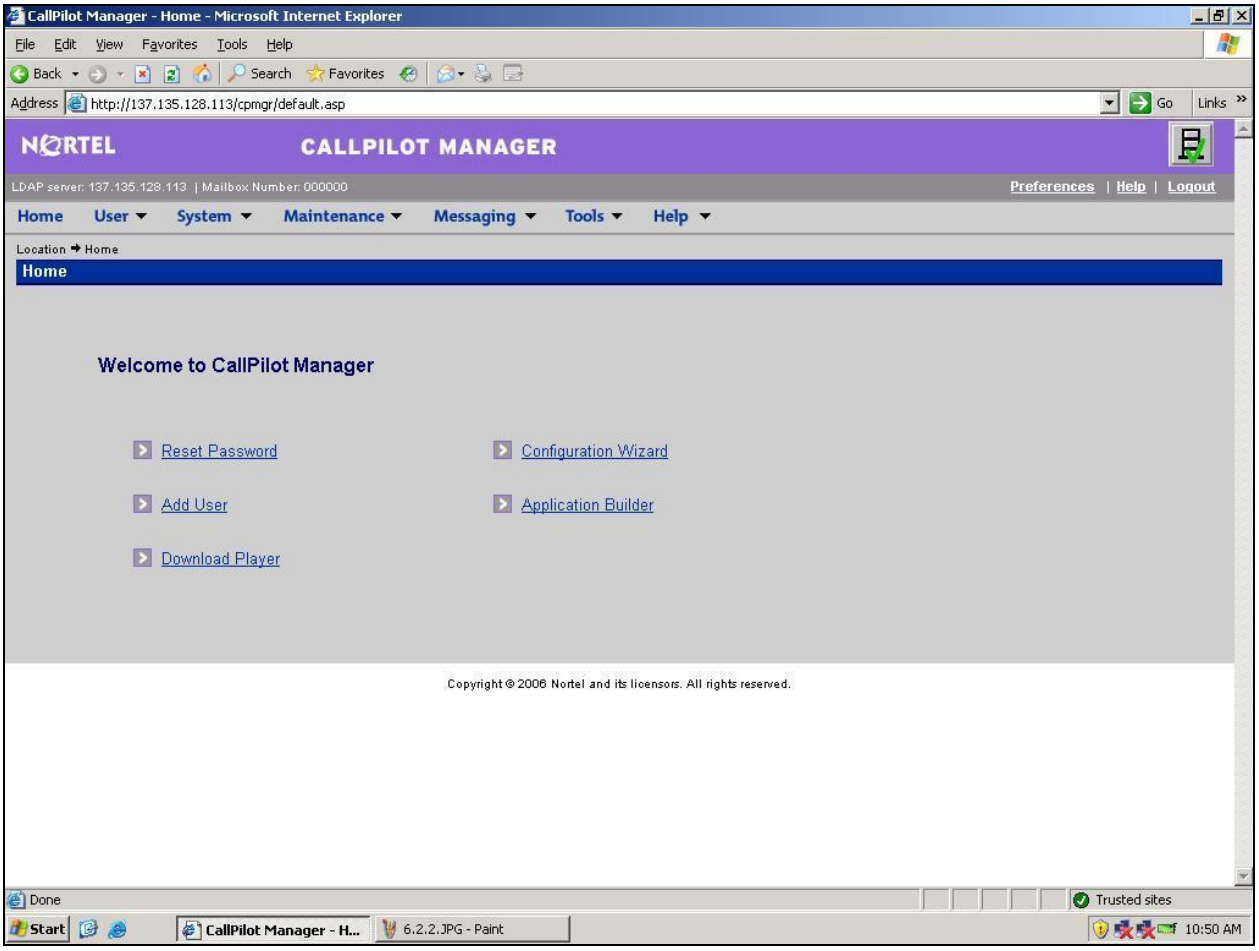

Figure 6.2.4: CallPilot Main Page

Lesson Content: CallPilot Configuration Wizard

Configuration Wizard

The Configuration Wizard is located in the Tools Menu.

CallPilot Manager Menu					
User Menu	**System Menu**	**Maintenance Menu**	**Messaging Menu**	**Tools Menu**	**Help Menu**
User Search	Server Settings	Maintenance Admin	Messaging Delivery Confirmation	**Configuration Wizard**	CallPilot Administration Help
Saved User Searches	Backup and Restore	Multimedia Monitor	Message Network Configuration	My CallPilot Configuration	About CallPilot Manager
Add User	Service Directory Number	Channel Monitor	Network Diagnostics	Download Player	
Auto Add	Alarm Monitors		Internet Mail Clients		
Auto Delete	Event Browser		External Email Servers		
Mailbox Classes	Performance Monitor		Messaging Management		
Shared Distribution Lists	OM Configuration		Dialing Information		
User Creation Templates			Holidays		
			Outcalling Administration		
			Restriction Permission List		
			Notification Device Classes		
			System Prompt Customization		
			Security Administration		

Lesson Content: CallPilot Configuration Wizard, continued

Welcome Page This is the Configuration Wizard Welcome page.

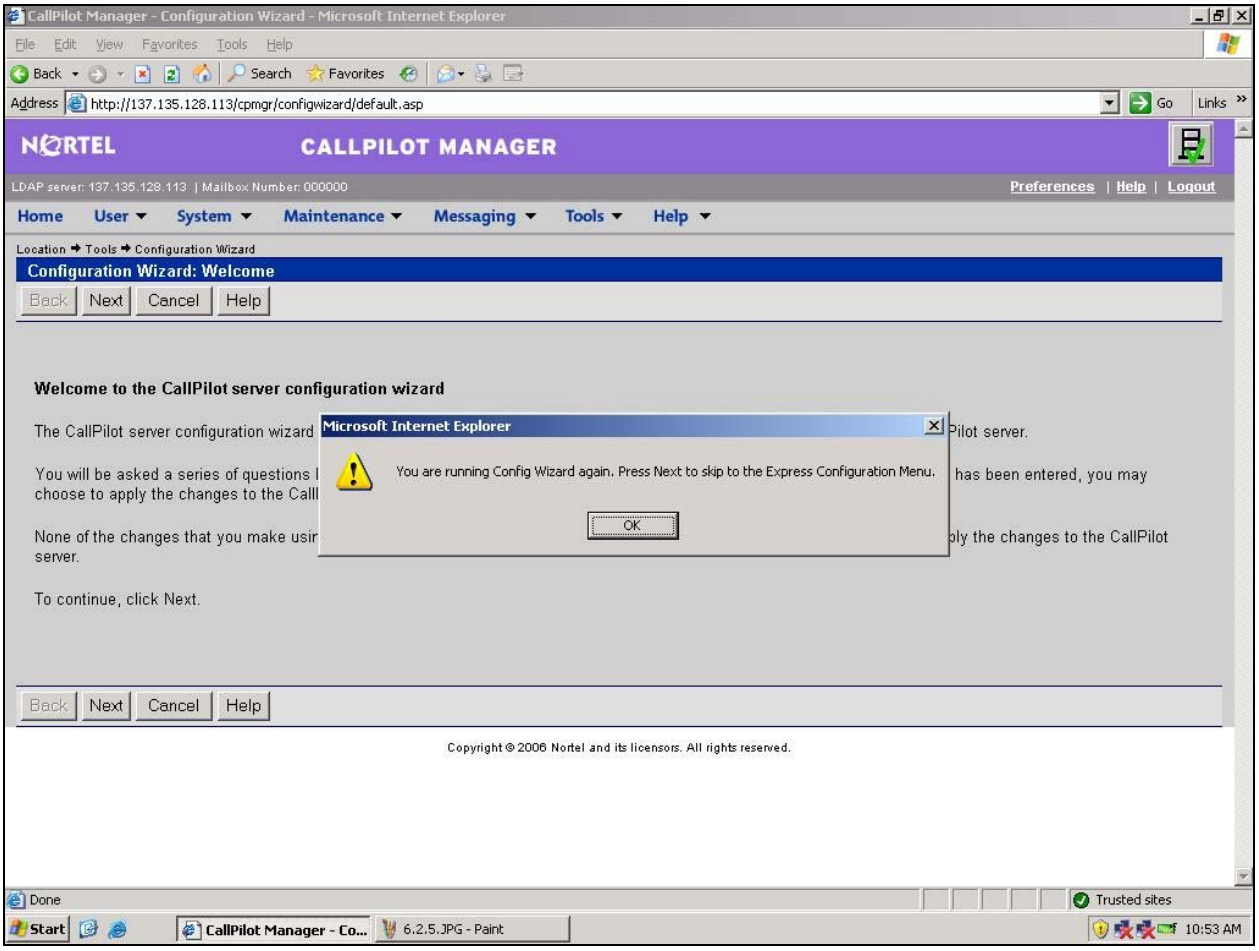

Figure 6.2.5: Configuration Wizard Welcome Page

Lesson Content: CallPilot Configuration Wizard, continued

Configuration Mode Page

This is the Configuration Wizard Configuration Mode page. This is where you select Standard or Express Mode. Standard is every page. Express lets you select pages.

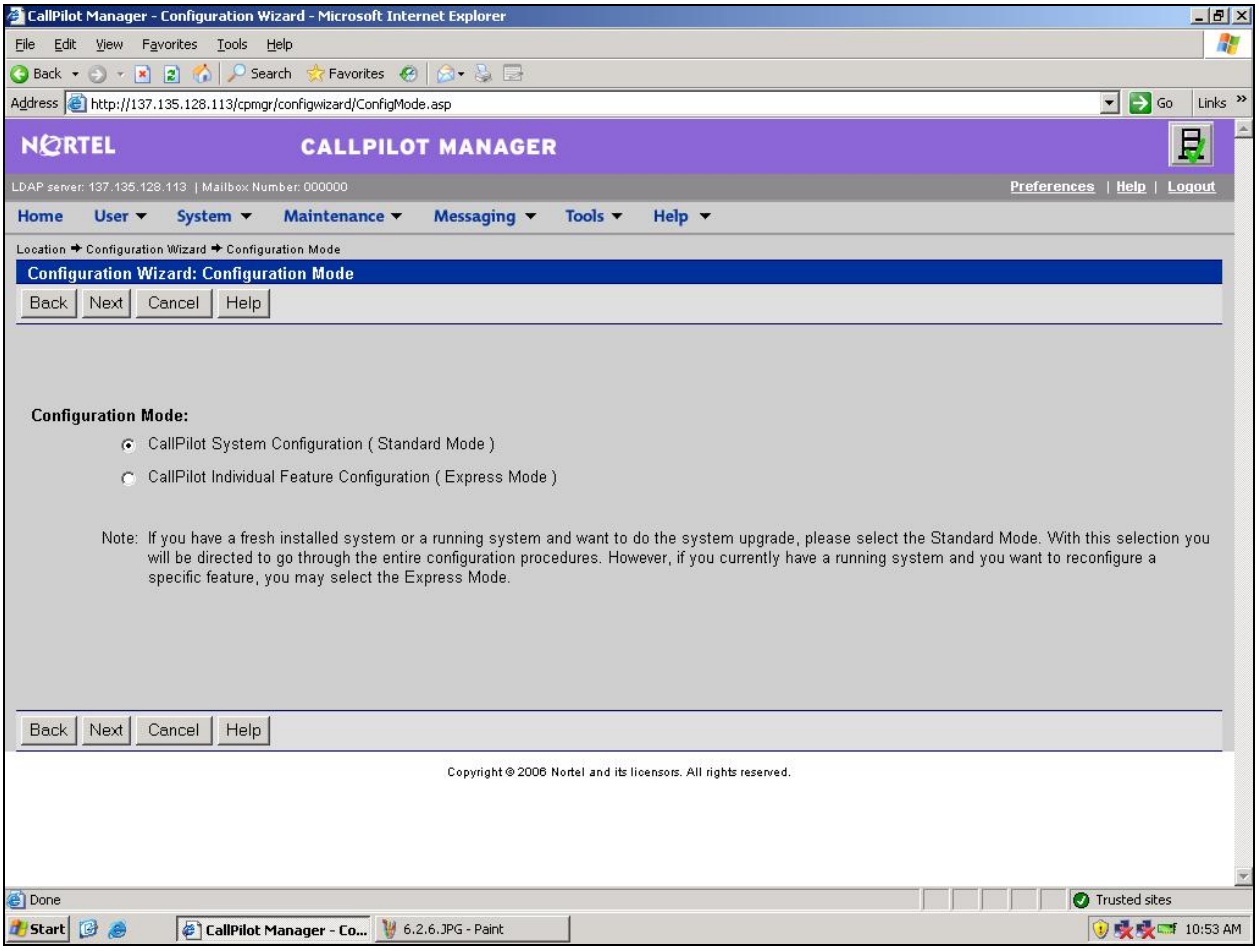

Figure 6.2.6: Configuration Wizard Configuration Mode Page

Lesson Content: CallPilot Configuration Wizard, continued

Keycode and Serial Number Page

This is the Configuration Wizard Keycode and Serial Number page. Enter your key codes for upgrade purposes.

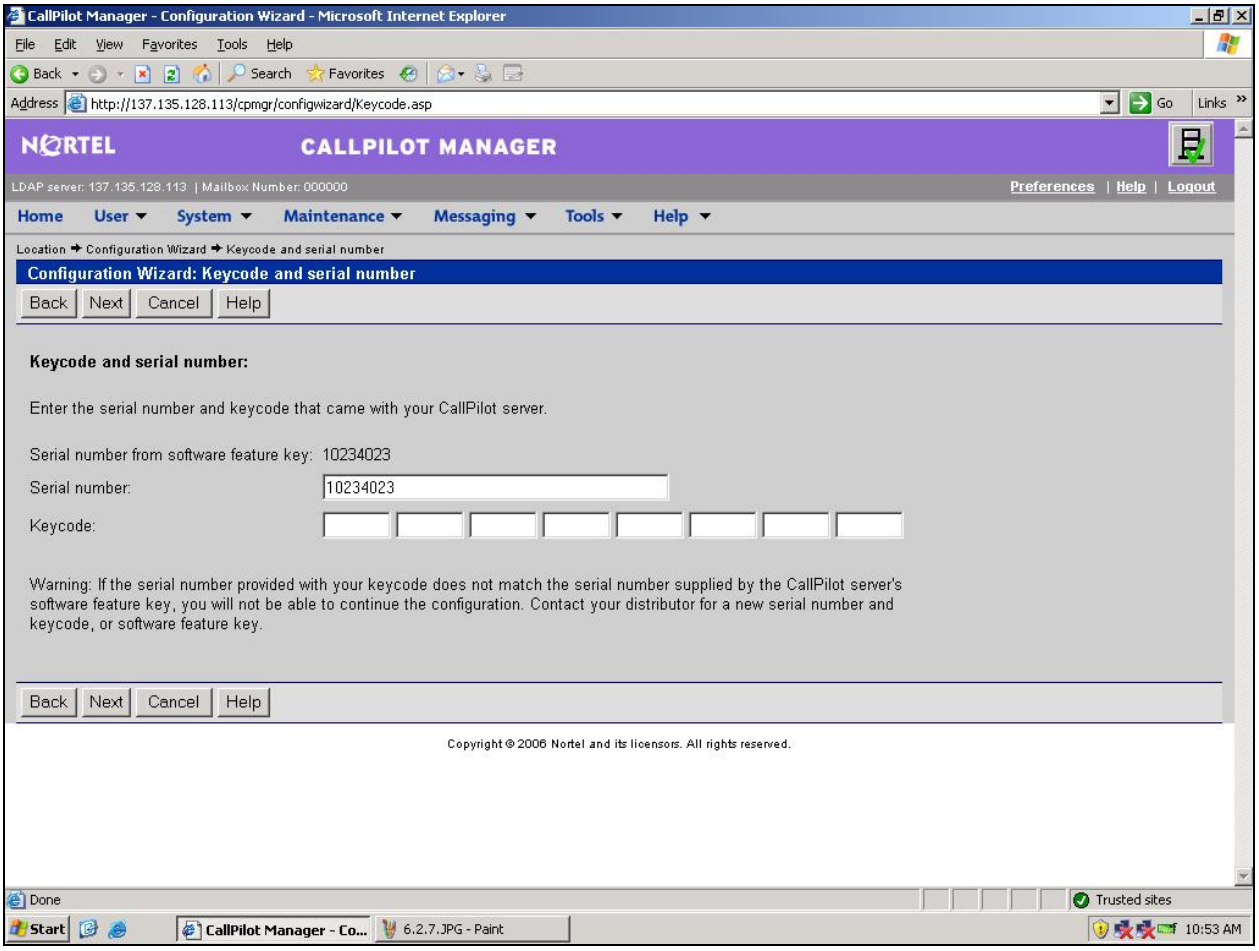

Figure 6.2.7: Configuration Wizard Keycode and Serial Number Page

Lesson Content: CallPilot Configuration Wizard, continued

Feature Verification Page

This is the Configuration Wizard Feature Verification page. This shows your current key codes versus your upgrade key codes.

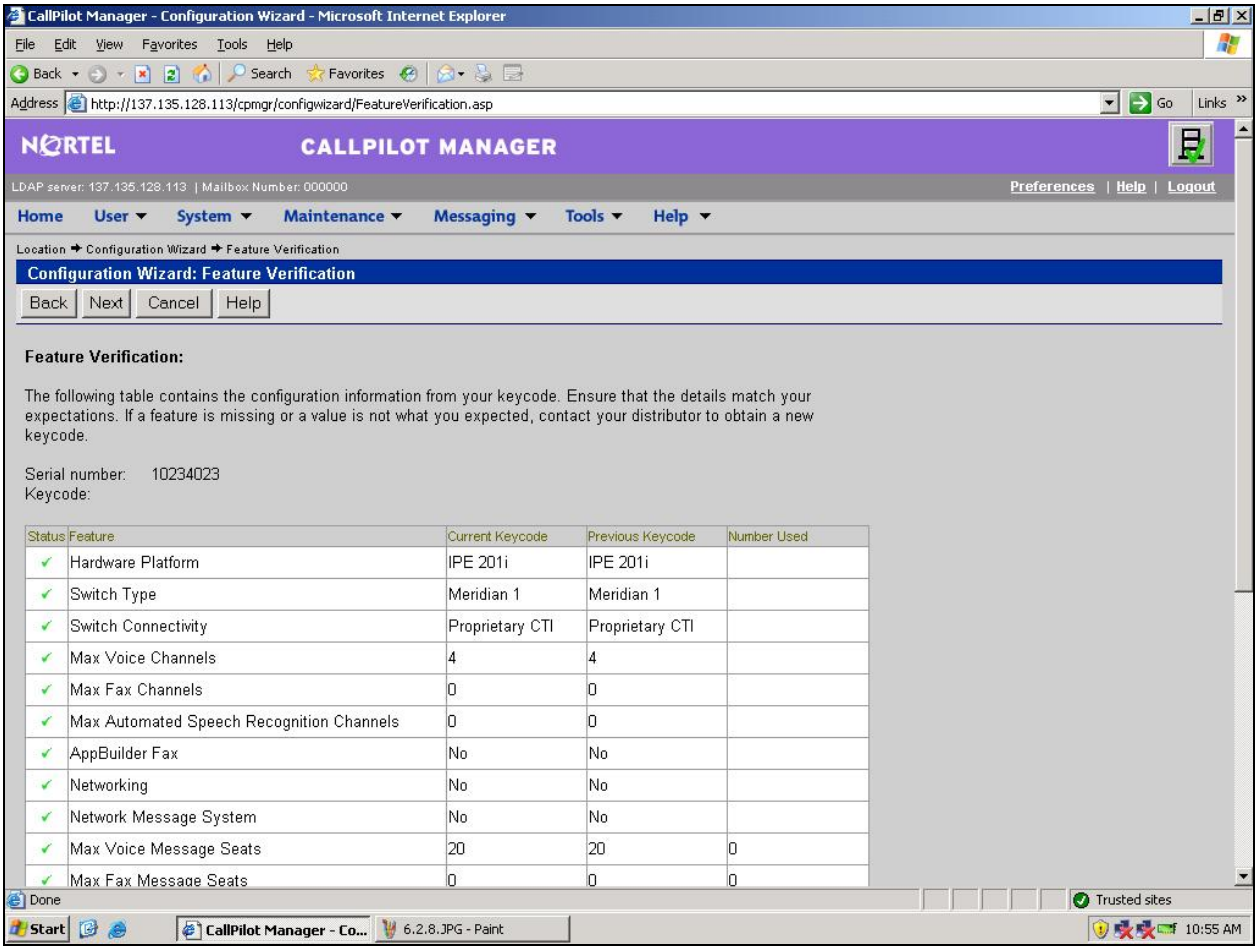

Figure 6.2.8: Configuration Wizard Feature Verification Page

Server Information Page

This is the Configuration Wizard Server Information page.

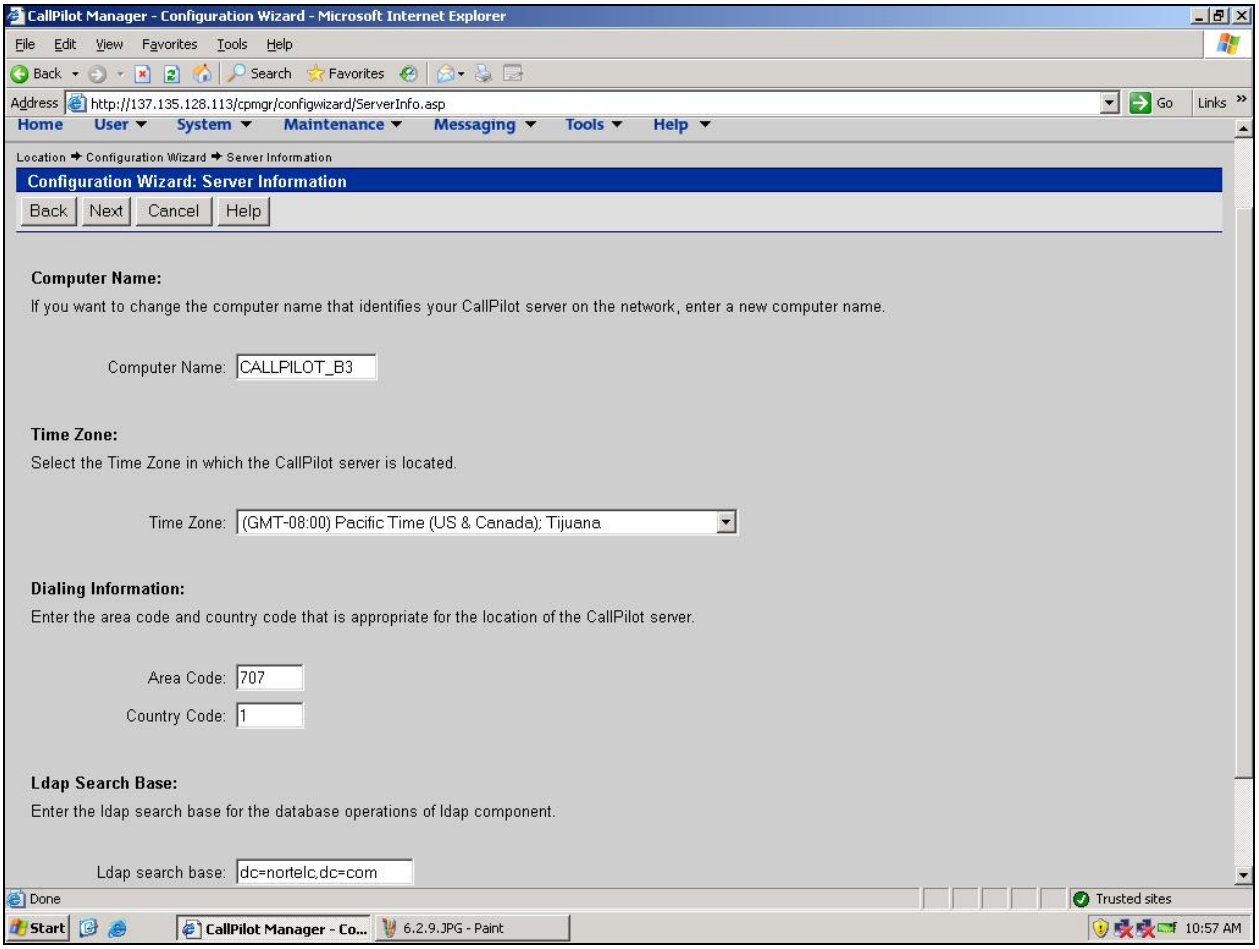

Figure 6.2.9: Configuration Wizard Server Information Page

Password Information Page

This is the Configuration Wizard Password Information page.

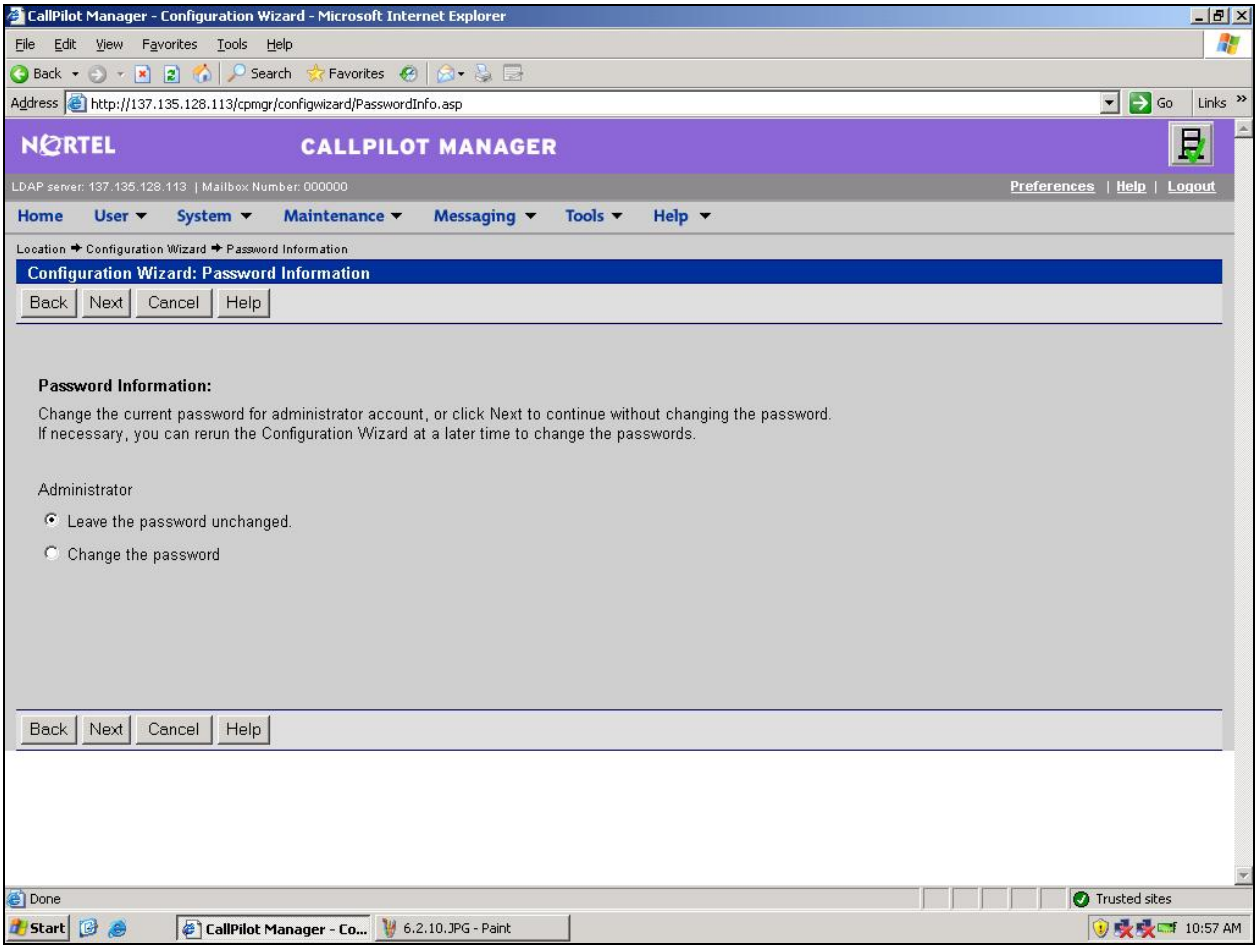

Figure 6.2.10: Configuration Wizard Password Information Page

Lesson Content: CallPilot Configuration Wizard, continued

Multimedia Allocation Page

This is the Configuration Wizard Multimedia Allocation page. This is where you allocate your channels per multimedia card.

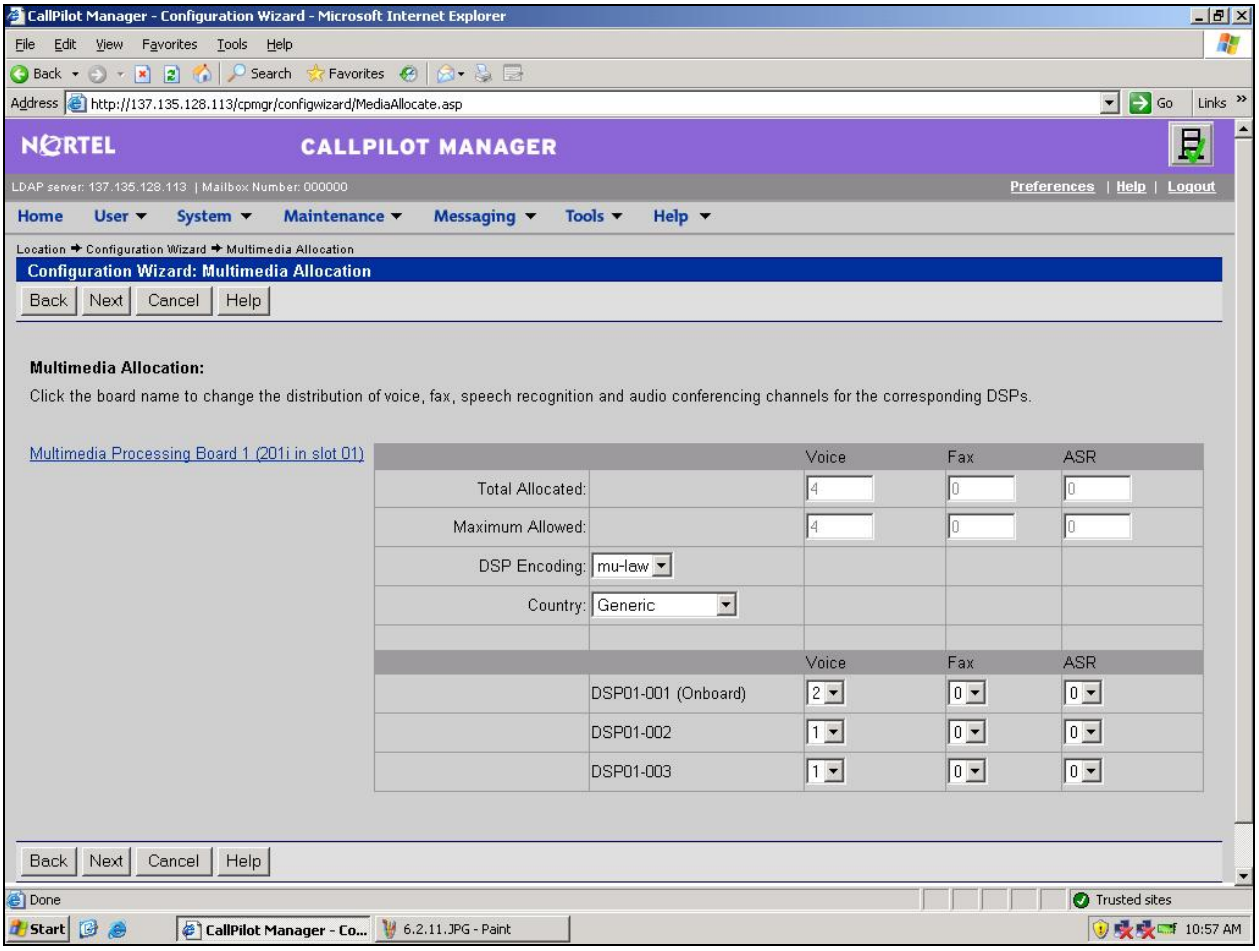

Figure 6.2.11: Configuration Wizard Multimedia Allocation Page

M1 Switch Information Page

This is the Configuration Wizard M1 Switch Information page. This is where you identify the agents that you programmed in your switch.

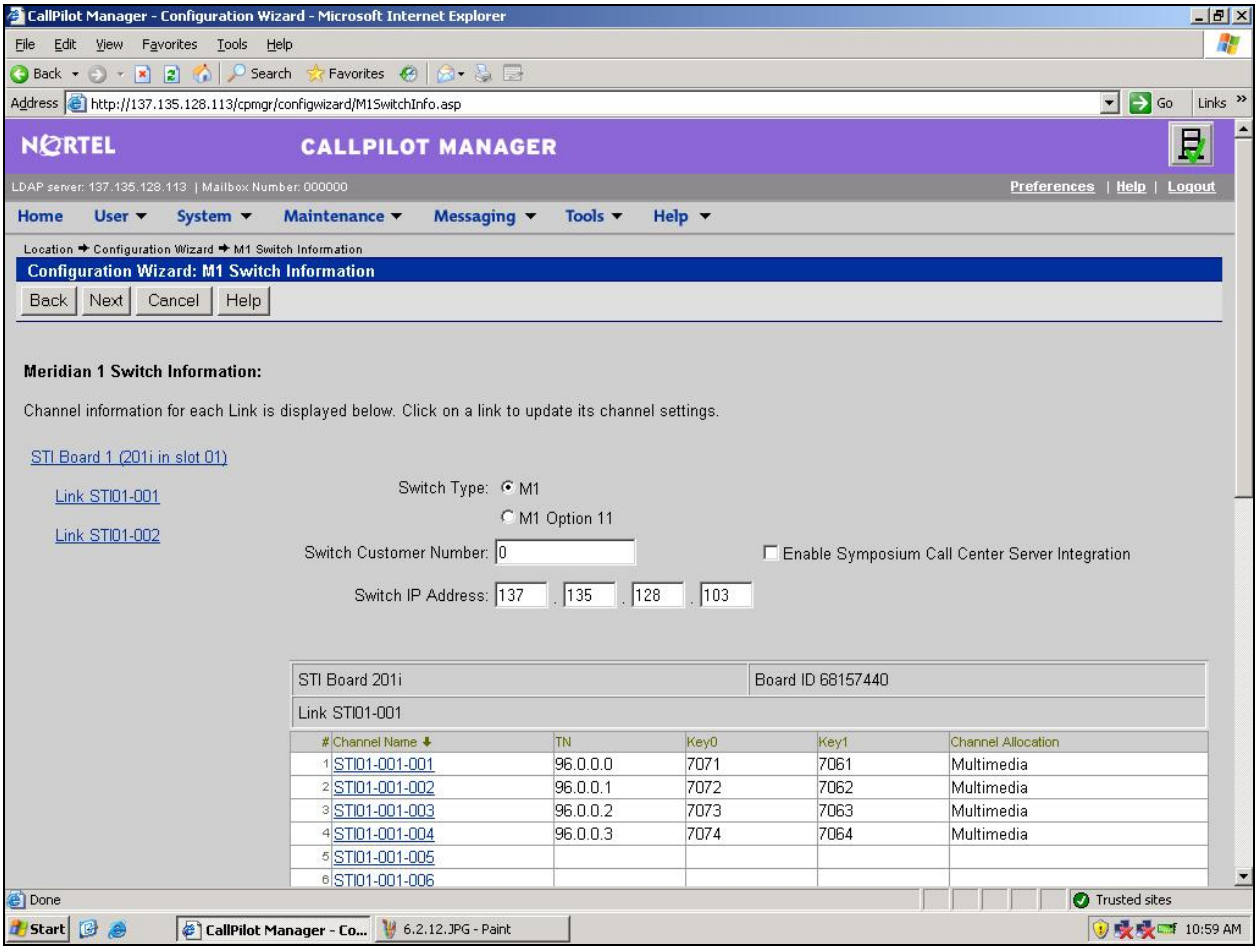

Figure 6.2.12: Configuration Wizard M1 Switch Information Page

Lesson Content: CallPilot Configuration Wizard, continued

Meridian 1 CDN Information Page

This is the Configuration Wizard Meridian 1 CDN Information page. This is where you program the control directory number (CDN).

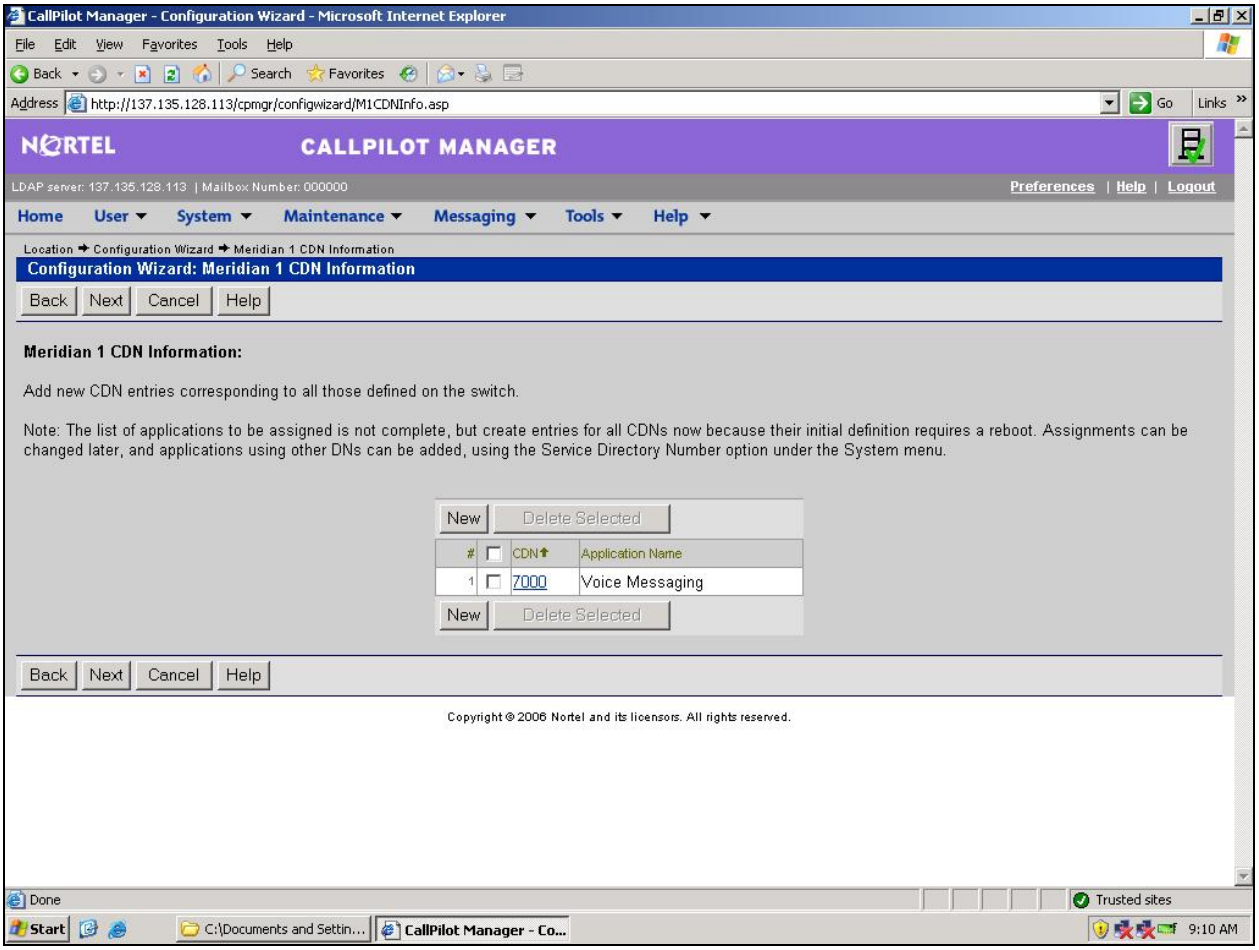

Figure 6.2.13: Configuration Wizard Meridian 1 CDN Information Page

Lesson Content: CallPilot Configuration Wizard, continued

Language Service Directory Page

This is the Configuration Wizard Language Service Directory page. This is where can install additional languages.

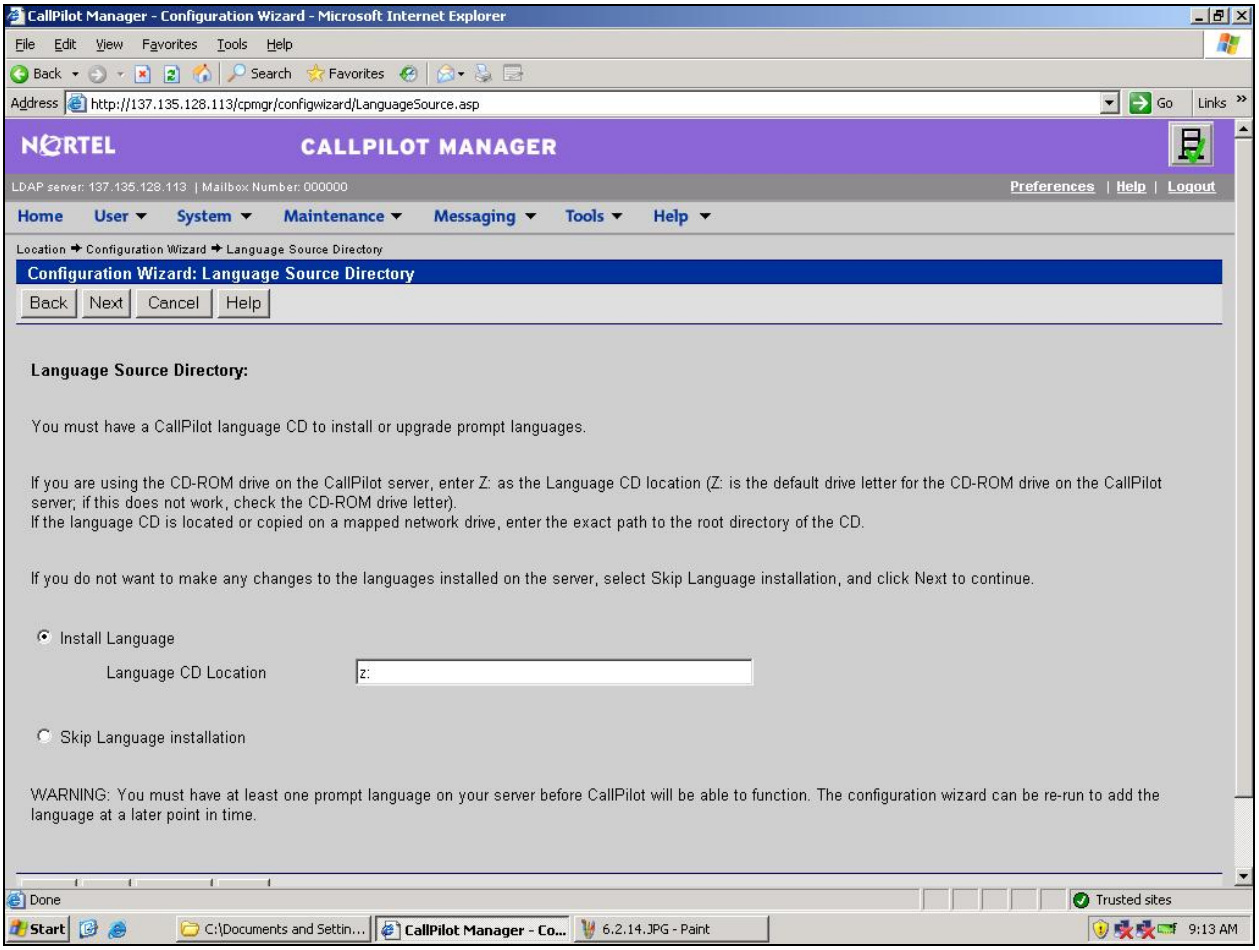

Figure 6.2.14: Configuration Wizard Language Service Directory Page

Lesson Content: CallPilot Configuration Wizard, continued

CallPilot Local Area Network Interface Page

This is the Configuration Wizard CallPilot Local Area Network Interface page. This is where you configure your CLAN and ELAN.

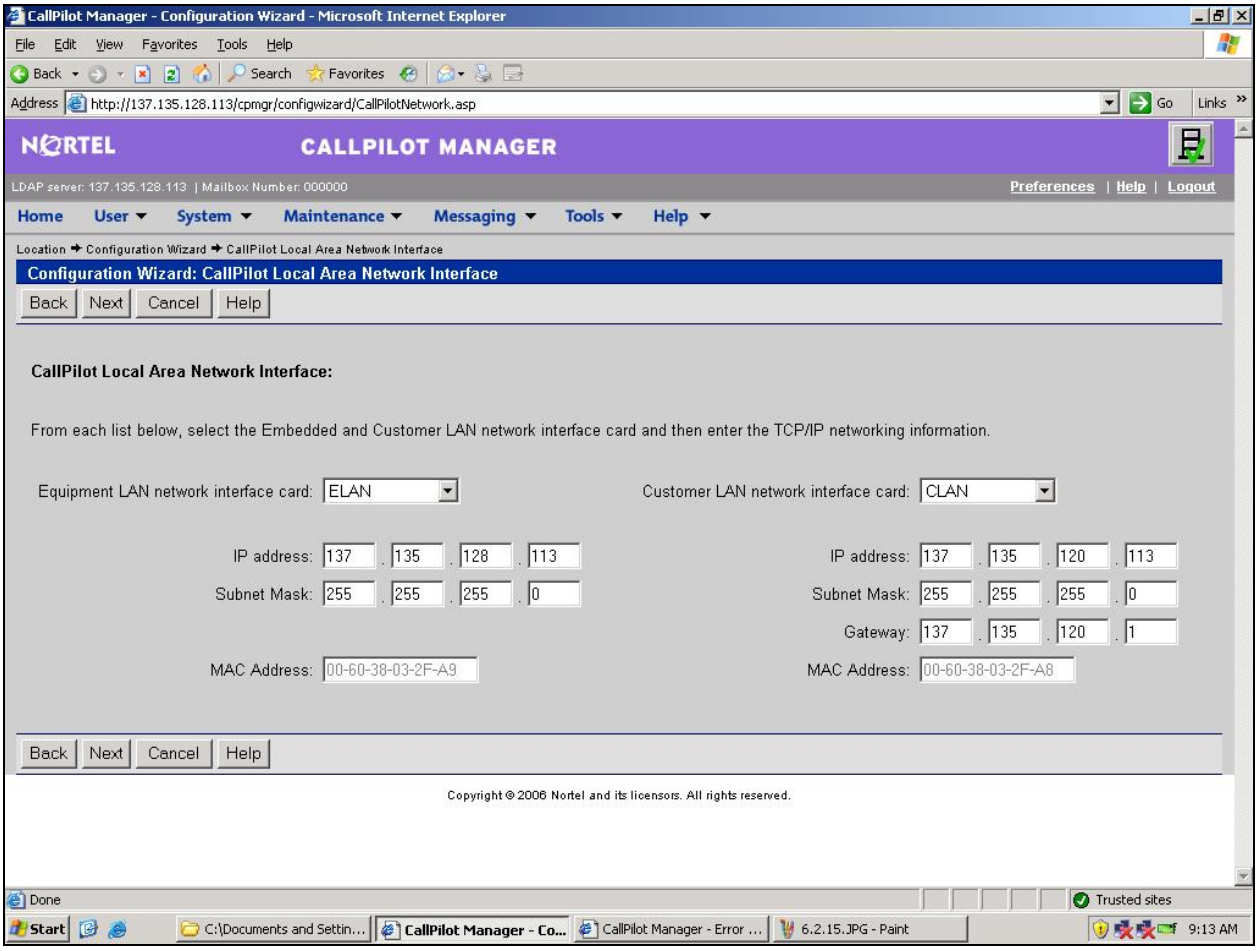

Figure 6.2.15: Configuration Wizard CallPilot Local Area Network Interface Page

Lesson Content: CallPilot Configuration Wizard, continued

Ready to Configure Page

This is the Configuration Wizard Ready to Configure page. Once you click Finish, you must reboot the CallPilot Server. If you hit Cancel, no changes are recorded.

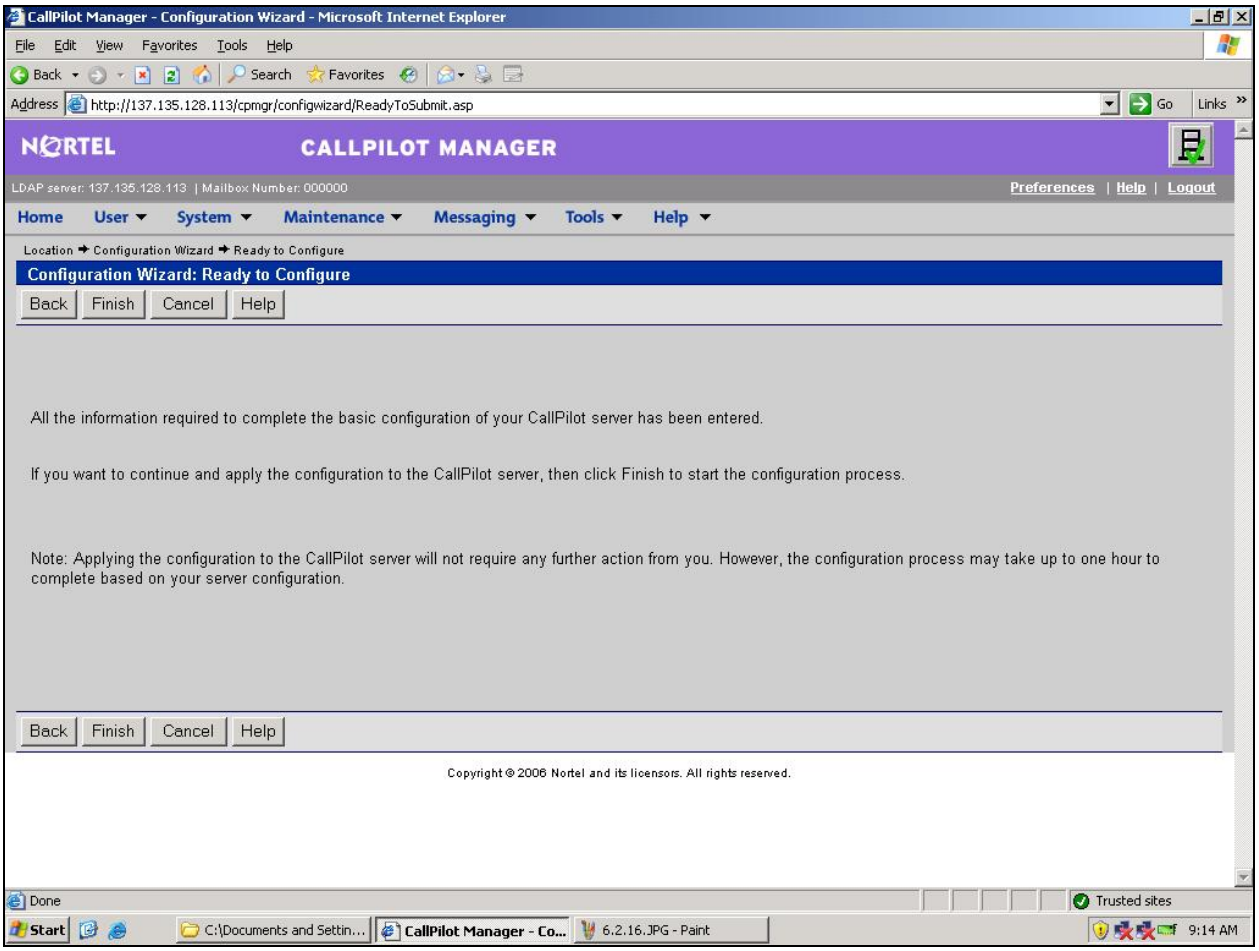

Figure 6.2.16: Configuration Wizard Ready to Configure Page

Practice Activity: Complete Configuration Wizard

Directions

In class complete configuration wizard with the information implemented on the Call Server in Work Orders 22-24. When all configuration data is entered click **Finish** and complete Configuration Wizard.

Once CallPilot is up and ready to receive calls complete Work Order 25

Lesson Review: CallPilot Manager

Questions

1. Match the CallPilot Menu items in Column A with their content page in Column B. Use each description only once.

Column A		Column B	
_____	1. Tools	a.	Alarm Monitor
_____	2. User	b.	Channel Monitor
_____	3. Help	c.	Application Builder
_____	4. Messaging	d.	Mailbox Classes
_____	5. System	e.	Dialing Information
_____	6. Maintenance	f.	About CallPilot Manager

2. What is an appropriate definition of CallPilot Manager?

   A. A key-coded feature that provides the functionality required to administer and configure the CallPilot system.
   B. A GUI-based software application that provides the functionality required to administer and configure the CallPilot system.
   C. A software application that must be installed on each administrator's client PC to provide functionality for CallPilot administration and configuration.
   D. A non-key coded Web application that provides the functionality required to administer and configure the CallPilot system.

Summary

Lesson Summary

In this lesson, you learned how to log in and navigate CallPilot Manager as well as configure CallPilot using the Configuration Wizard. Upon completion of this student guide and after the lesson presentation and practice exercise, you should be able to:

7.3 **ESTABLISH** CallPilot Server network connectivity using CallPilot Manager and CallPilot Configuration Wizard with 100% accuracy as evidenced by a positive function check.

- **7.3.1** **REVIEW** manufacturer's documentation
- **7.3.2** **DETERMINE** customer configuration
- **7.3.3** **PERFORM** function check
- **7.3.4** **COMPLETE** unit documentation

7.4 **PROGRAM** phones for voicemail access using Command Line Interface (CLI) and Element Manager (EM) with 100% accuracy as evidenced by a positive function check.

- **7.4.1** **REVIEW** manufacturer's documentation
- **7.4.2** **DETERMINE** customer configuration
- **7.4.3** **PERFORM** function check
- **7.4.4** **COMPLETE** unit documentation

LESSON 3

USER MENU

Overview

Overview

In this lesson, you are introduced to the User Menu accessed from the CallPilot Manager Menu. You perform the following tasks:

- Search for users
- Use saved user searches
- Add a user
- Perform auto administration
- Configure mailbox classes
- Define shared distribution lists
- Set up user creation templates

This lesson provides you with the key performance elements to use the User menu of the CallPilot system. You will start this lesson by setting up mailbox classes of service. Next, you will configure the user-creation templates. Next, you will learn how to add users using the Add User menu option. Finally, you will learn how to perform a user search for making modifications to the user's mailbox options. There will be a performance activity at the end of this lesson to test comprehension of the key performance elements that you'll need to perform for upcoming tasks.

Performance Objectives

Upon successful completion of this lesson, you will be able to:

7.5 **PROGRAM** mailbox classes using CallPilot Manager with 100% accuracy.

- **7.5.1** **REVIEW** manufacturer's documentation
- **7.5.2** **DETERMINE** customer configuration

7.6 **PROGRAM** user creation templates using CallPilot Manager with 100% accuracy.

- **7.6.1** **REVIEW** manufacturer's documentation
- **7.6.2** **DETERMINE** customer configuration

7.7 **ADD** voicemail boxes using CallPilot Manager with 100% accuracy as evidenced by a positive function check.

- **7.7.1** **REVIEW** manufacturer's documentation
- **7.7.2** **DETERMINE** customer configuration
- **7.7.3** **PERFORM** function check

Continued on next page

Overview, continued

Performance Objectives, contd.

7.8 **PROGRAM** distribution lists using CallPilot Manager with 100% accuracy as evidenced by a positive function check.

- **7.8.1** **REVIEW** manufacturer's documentation
- **7.8.2** **DETERMINE** customer configuration
- **7.8.3** **PERFORM** function check

7.10 **PERFORM** a voicemail Move, Add and Change (MAC) using CallPilot Manager with 100% accuracy as evidenced by a positive function check.

- **7.10.1** **REVIEW** manufacturer's documentation
- **7.10.2** **DETERMINE** customer configuration
- **7.10.3** **PERFORM** function check

Performance Evaluations

The performance evaluations for these tasks are scheduled immediately following this lesson. These performance evaluations will be in delivered via a work order. These work orders will test the performance objectives you have just completed in this lesson. These work orders build in complexity based on previous tasks from previous lessons. These performance evaluations are in a separate workbook from this Student Guide. Your instructor will hand these workbooks out in class. Please do not complete these work orders prior to the instructor assigning them to you. You will work in your booth with your partner. Your instructor will sign off these performance evaluations as you complete each task.

References

The information in this lesson can be found in the following reference:

- CallPilot Administrator's Guide— NN44200-601_01.21

Tools and Equipment

The tools and equipment used for this lesson are:

- CallPilot Server
- Call Server

Job Aids

The job aids for this lesson are:

- How to Add Existing Mailbox Owner to SDL
- How to Add New Mailbox Owners to SDL
- How to Delete Mailbox Owners from SDL

Handouts

There are no handouts for this lesson.

Overview, continued

Key Terms

Review the following key terms before you begin the reading assignment.

Term	Definition
Mailbox Class of Service	Each mailbox user is assigned to a mailbox class. This class of service indicates the user's level of access to features and services.
Mixed Media Messages	These are messages that contain both voice and fax.
Multimedia Messaging Service	This service is used to deliver a composed voice message to a mailbox number.
Network Message Service	With Network Message Service (NMS), one CallPilot system can support up to 58 remote sites.
Remote Notification (RN)	Remote Notification informs users immediately when new messages arrive in their mailboxes, even if they are away from their phones. Notifications are in the form of recorded messages and are sent to remote phones or pagers, as defined by the user or the administrator.
Restriction/ Permission Lists	Restriction/Permission Lists control the numbers to which messages and notifications can be delivered. For each Mailbox Class in which at least one outcalling service is enabled, an appropriate restriction/permission list must be applied.
Schedule	A schedule is a set of user-defined days and times during which notification is enabled. Each user has a notification schedule, which is made up of one or more schedule periods.
Service Directory Number	A Service Directory Number is a number assigned to a particular service in the Service Directory Number table. The outcalling features are assigned SDNs in the SDN table.

Lesson Content: CallPilot Manager > User Menu

User Menu The CallPilot User Menu options are displayed below.

CallPilot Manager Menu					
User Menu	**System Menu**	**Maintenance Menu**	**Messaging Menu**	**Tools Menu**	**Help Menu**
User Search	Server Settings	Maintenance Admin	Messaging Delivery Confirmation	Configuration Wizard	CallPilot Administration Help
Saved User Searches	Backup and Restore	Multimedia Monitor	Message Network Configuration	My CallPilot Configuration	About CallPilot Manager
Add User	Service Directory Number	Channel Monitor	Network Diagnostics	Download Player	
Auto Add	Alarm Monitors		Internet Mail Clients		
Auto Delete	Event Browser		External Email Servers		
Mailbox Classes	Performance Monitor		Messaging Management		
Shared Distribution Lists	OM Configuration		Dialing Information		
User Creation Templates			Holidays		
			Outcalling Administration		
			Restriction Permission List		
			Notification Device Classes		
			System Prompt Customization		
			Security Administration		

Lesson Content: Mailbox Classes

Overview

A mailbox class defines the mailbox capabilities for a number of users. A change to a setting in a mailbox class affects all members of that mailbox class. A user must belong to a mailbox class to exist as a mailbox user. Also, you cannot delete a mailbox class that is assigned to a user.

Accessing Mailbox Classes

You can access the mailbox class settings by clicking Users in the CallPilot Manager menu bar > Mailbox Classes.

Mailbox Classes Browser Page

Use mailbox classes to specify the following mailbox and messaging capabilities:

- Mailbox storage capacities and other resource usage controls
- Call answering options
- Message delivery options
- Keycoded features that users are permitted to use
- Dialing restrictions and permissions for CallPilot messaging features and services that use the Thru-Dial function

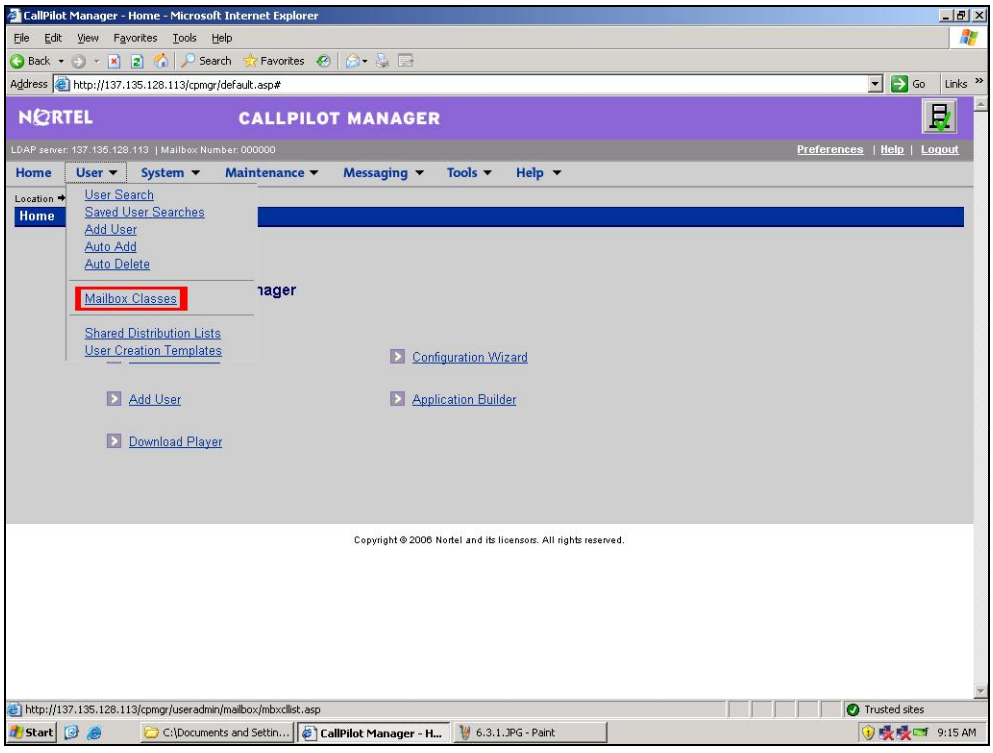

Figure 6.3.1

Mailbox Classes Browser Page, contd.

The Mailbox Classes items include:

- A Help button provides direct access to online information specifically related to Mailbox Classes.
- A table listing the names of the classes on your system and the corresponding restriction code member number and Comment section. A checkbox is located adjacent to the Class Name. When you click to place a check in the checkbox, the Delete Selected button is available if you need to delete a class.

NOTE: You cannot delete a mailbox class if it has any members.

CallPilot provides several pre-installed mailbox classes for you to customize, including:

- Regular User
- Basic User
- Executive
- Assistant
- Administrator

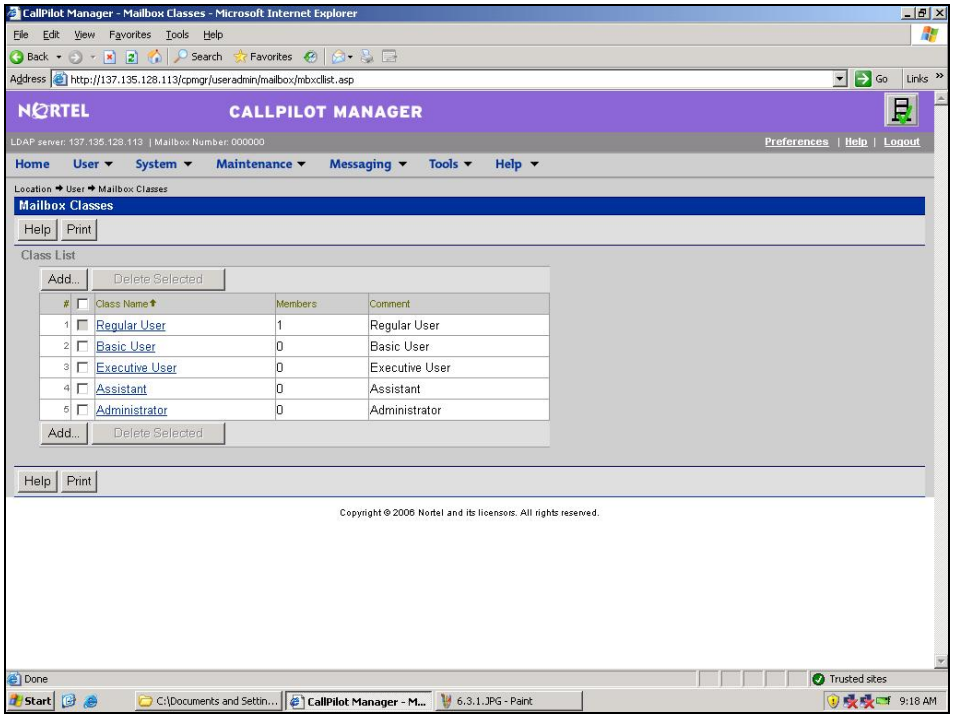

Figure 6.3.2: Mailbox Classes Browser Page, Showing Pre-Installed Classes

Lesson Content: Mailbox Classes, continued

Mailbox Section

The Mailbox section contains all of the fields associated with general mailbox class administration.

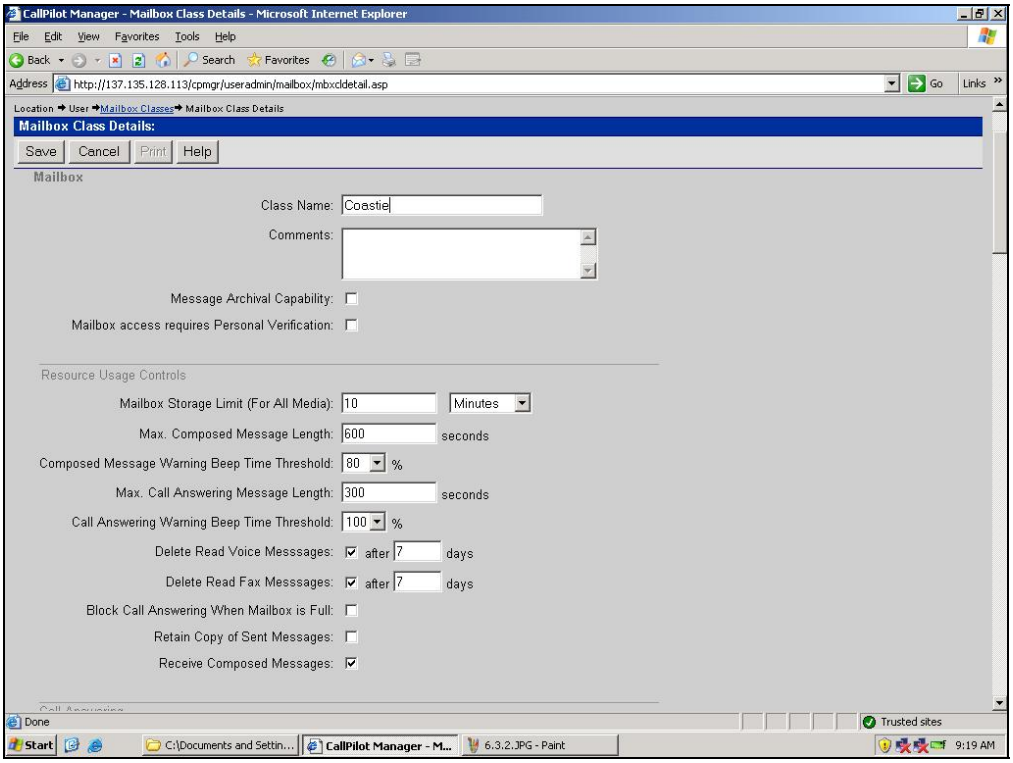

Figure 6.3.3: Mailbox Class Detail Page, Showing Mailbox Section

The fields that you administered in the Mailbox section of the Mailbox Class Detail page are shown below:

Field	Description
Class Name	This free text entry field accepts any alphanumeric string up to 30 characters in length.
Comments	This field lets the administrator make comments about the mailbox class that can be viewed in the Mailbox Classes browser page.

Lesson Content: Mailbox Classes, continued

Resource Usage Controls Section

This table describes the fields in the Resource Usage Controls section of the Mailbox Class Details page.

Field	Description
Mailbox Storage Limit (For All Media)	This value determines the maximum amount of storage available to the user. Any value can be entered for max composed message length or max call answering message length.
Max. Composed Message Length	This value determines how long a message a user in this mailbox class can compose. Any value between 0 and 7199 seconds can be entered in one-second increments. The default is 600 seconds.
Max. Call Answering Message Length	This field determines how long a call-answering message a caller can record and leave in the user's mailbox. Any value can be entered between 0 and 3599 seconds. The default value is 300 seconds. This value cannot be greater than the voice-storage limit.
Delete Read Voice Messages	This value represents the number of days that any read message is stored in a mailbox before the system deletes it. The value can be between 1 and 99. The default value is 7.
Delete Read Fax Messages	This value represents the number of days that any read fax is stored in a mailbox before the system deletes it. The value can be between 1 and 99. The default value is 7.
Block Call Answering When Mailbox is Full	This value determines the system’s behavior when an individual’s mailbox becomes full. The default setting is enabled.
Retain Copy of Sent Messages	If this is not checked, then a sent message remains in the mailbox until the end of the session.
Message Archival Capability	If you check this box, the Message Archival feature tags a message for auto-deletion instead of automatically deleting the message once the read message retention period is reached.

Mailbox Storage Limits

The table below defines the mailbox storage limits for all media. If users surpass this limit, the system does not cut off the calls. The users hear a message that the mailbox is full, and restrictions determine what they can do.

Mailbox Storage Limits (For all Media)		
Media	**Range**	**Default Value**
Minutes	1–360	10
Pages	2–635	18
10KBytes	14–5082	144

Lesson Content: Mailbox Classes, continued

Call Answering

The Call Answering section contains all of the fields associated with administering mailbox classes.

The fields that you administered in the Call Answering section of the Mailbox Class Detail page are shown below:

Field	Description
Personal Verification	This field includes the following options in the drop-down box: Record from Telset: This option permits mailbox owners to record their own personal verifications. Record for All Users: This option lets a mailbox owner help CallPilot administrators in recording personal verifications for directory entries and mailboxes. Set by Administrator: This option prevents mailbox owners from recording their own personal verifications.
Revert DN set by Phoneset	If checked, this setting lets all users in this mailbox class set and change their revert DN from their telephone. The revert DN is the number to which calls are passed if the caller presses 0 during a call answering session, or when the caller waits more than two seconds to enter a number after dialing 0.
Record Organization Call Answering Greeting	If the groups of mailbox owners are administrators who are responsible for recording and updating greetings heard by all callers into the CallPilot system, you must ensure there is a check mark in this checkbox. The call answering greeting plays to external callers when they are connected to a user's mailbox through call answering. This greeting plays before any personal greetings and typically contains the spoken name of the organization. This greeting plays when a remote notification call is answered.
Language for Callers	This field is the selection of the language of prompts heard by a caller entering a call answering session in this mailbox

Lesson Content: Mailbox Classes, continued

Message Delivery

The Message Delivery section contains all of the fields associated with sending and receiving calls and messages. The fields that you administer in the Message Delivery section of the Mailbox Class Detail page are shown below:

Field	Description
Broadcast Capability	Select this option if you want the user to be able to compose and send broadcast messages. A broadcast message is one that is sent The default is Disabled.
SDL Addressing	If this option is checked, users with this mailbox class can use the distribution lists defined at the system level.

Outcalling (Delivery to Telephone or Delivery to Fax)

The Outcalling section contains all of the fields associated with outcalling features. The fields that you administer in the Outcalling section of the Mailbox Class Detail page are shown below:

Field	Description
Outcalling Capability	This field determines whether or not users belonging to this mailbox class can compose and send messages to people who do not have a mailbox on the same system. The default is unchecked.
Remote Test Notification Capability	You can configure CallPilot to notify individual mailbox owners of new messages via an email message. Mailbox owners can receive email notification from any communications device that supports SMTP protocol, including the Research in Motion BlackBerry device.

Notification of Message Delivery

The Notification of Message Delivery section contains all of the fields associated with delivery notification features. The fields that you administer in the Notification of Message Delivery section of the Mailbox Class Detail page are shown below:

Field	Definition
Remote Notification Capability	You can program Remote Notification settings to provide the following services to mailbox owners: Permit mailbox owners to be notified of new messages on a home phone, cell phone, or pager. Configure a pager to receive notifications. Configure the criteria for notification success and the retry strategy.

Practice Activity: Mailbox Classes

Directions Build a custom Mailbox Class using Work Order 26.

Lesson Content: User Templates

Setting Up User Templates

To speed up the user creation process, CallPilot provides user templates that contain different default settings. You can duplicate a template that is similar to one that you require, rename it, and make modifications as needed.

When you create a new user in the Add User page or the Auto Admin page, you must select a user template as your first step. If none of the existing templates meets your needs, you must create a new template in the User Creation Templates page.

New users are created based on the template settings. The user creation templates pre-fill the user fields that lie outside of the mailbox class fields with the exception of the unique data fields, such as first and last name, mailbox number, and other information. The templates also establish the default classes of service for the user.

When a user is created with a template, changes to the template settings do not impact the user. The templates apply to user creation, not user maintenance. In fact, any fields associated with individual users lying outside of the mailbox class cannot be changed on a global basis.

Typically, the administrator creates regular users, with no administrator capabilities, time and time again. The majority of users only require the mailbox selection.

Lesson Content: User Templates, continued

Setting Up User Templates, contd.

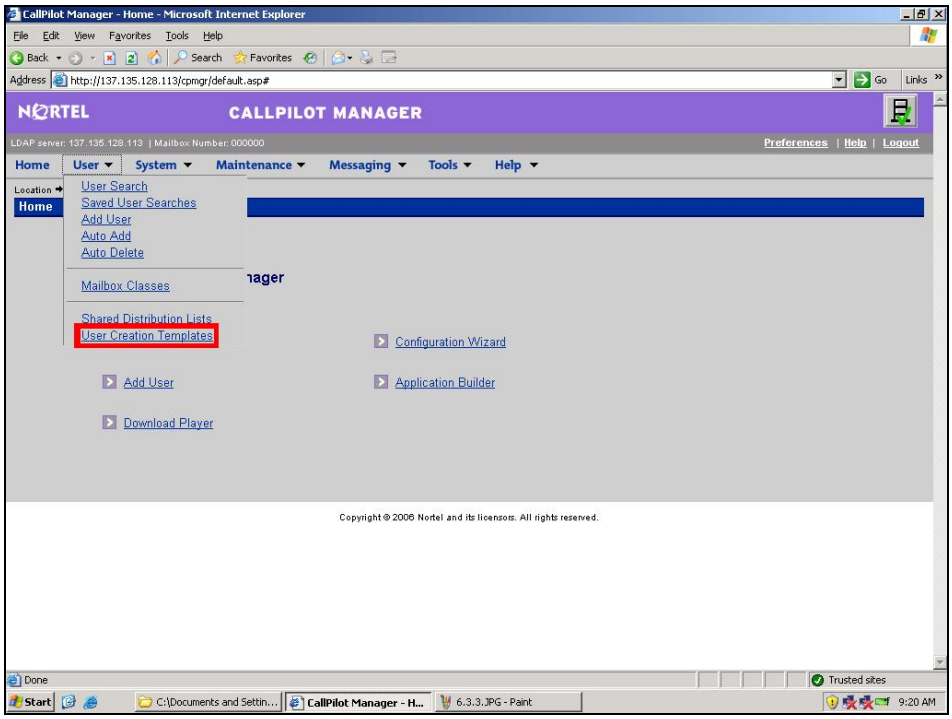

Figure 6.3.4: CallPilot Main Page, Showing the User Menu

Template Documentation

Nortel Networks recommends that you keep updated records of your templates. Document your templates by printing a hard copy of the following reports for your records:

- The template name of the selected template
- A list of template names for all defined templates
- A detailed list of all properties of each template

Lesson Content: User Templates, continued

Pre-Installed User Creation Templates

CallPilot systems provide the following pre-installed User Creation Templates:

- Basic User Template
- Executive User Template
- Assistant Template
- Administrator Template
- Remote User Template
- Directory Entry User Template
- Admin Only Template
- Regular User Template

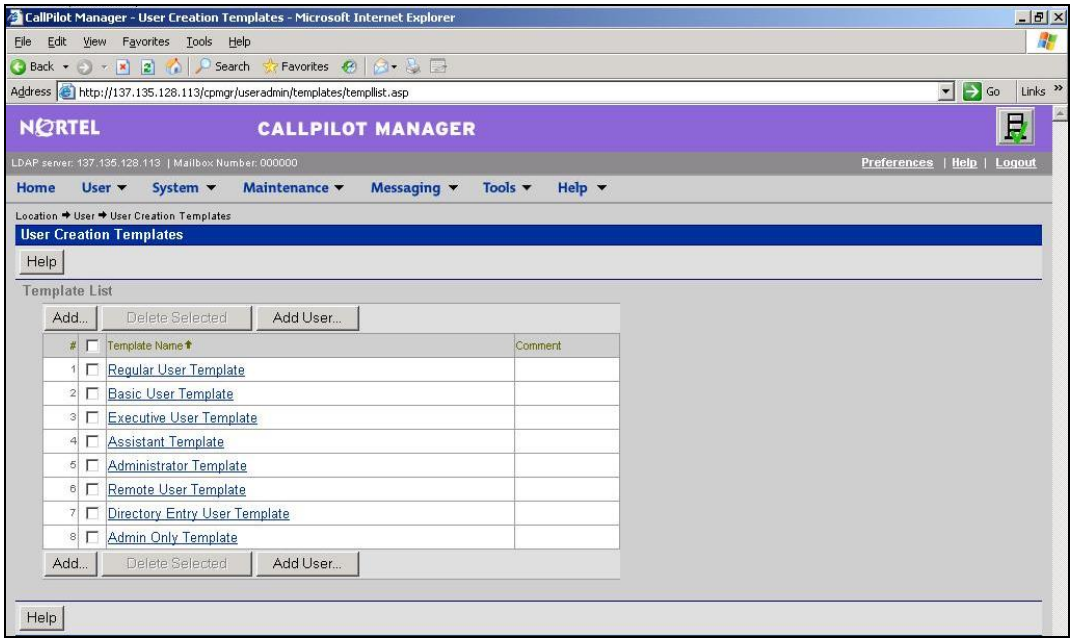

Figure 6.3.5: User Templates List Page

Administrator Template

There are two types of administrator template that are pre-installed:

- Administrator Template
- Admin Only Template

Use the Administrator Template for administrators who have mailboxes and the Admin Only Template for administrators without mailboxes.

Administrators are mailbox owners who can have all rights or only some specialized rights. If you are an administrator with full rights, your privileges let you do the following:

Set up support technicians as administrators without mailboxes but with all administration rights. In this case, apply the Admin Only Template, which contains default settings that give full access to the CallPilot system, allowing them to perform their support tasks.

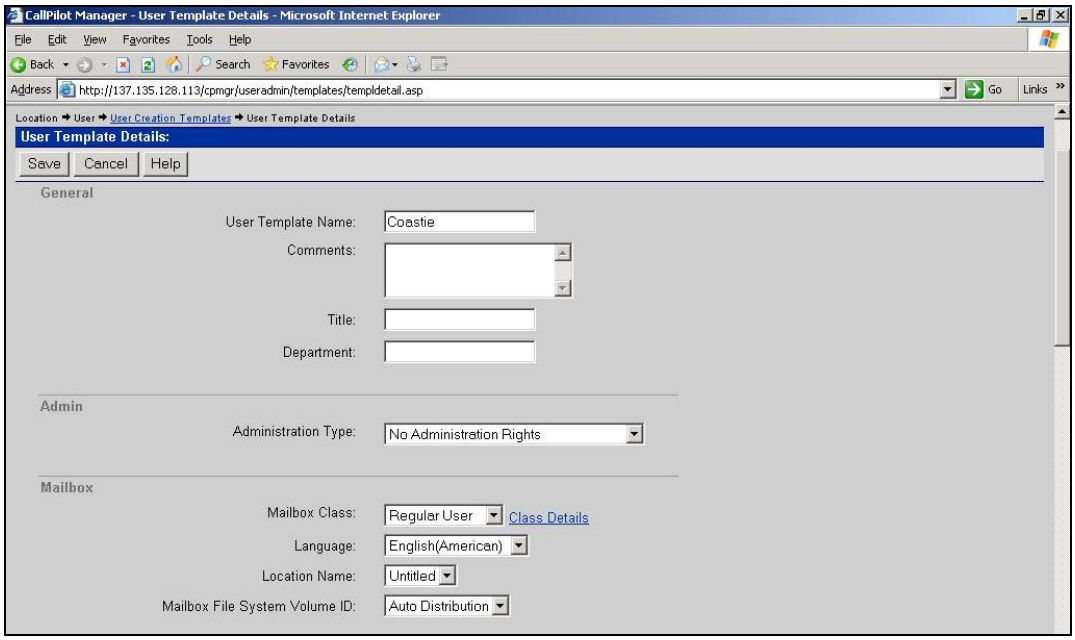

Figure 6.3.6: User Template Details Page

Set up day-to-day administrators with specific administrative privileges and mailbox ownership. These administrators are allowed access only to the parts of the CallPilot system in which they perform their delegated tasks. In this case, use the Administrator Template to create a template so you can customize the privileges for your specialized administrators. Typical assignments that are delegated to specialized administrators are listed below:

- User Administration
- Mailbox Class Administration
- Shared Distribution List Administration
- Backup/Restore Administration
- Service Directory Number Administration

Lesson Content: User Templates, continued

Accessing User Templates

Open the User Creation Templates by clicking User in the CallPilot Manager menu bar. Then, click User Creation Templates to access the User Creation Template browser page.

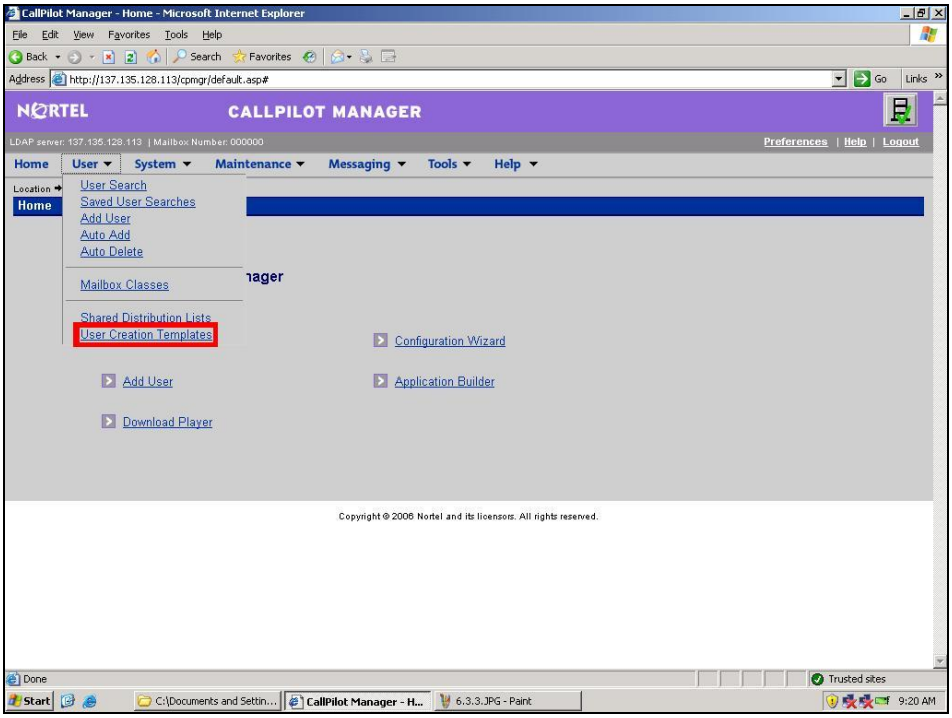

Figure 6.3.7: CallPilot Main Page, Showing the User Menu

Lesson Content: User Templates, continued

User Creation Templates Browser Page

The User Creation Templates browser page displays each of the pre-installed User Creation templates. You can modify nearly all pre-installed user templates to suit your organizational needs. The only pre-installed templates that cannot be modified are Remote User and Directory Entry. CallPilot provides pre-installed templates to ease the creation process by providing reasonable default values for mailbox options, and to minimize the time needed to add a user by requiring the administrator to fill in only user-specific fields.

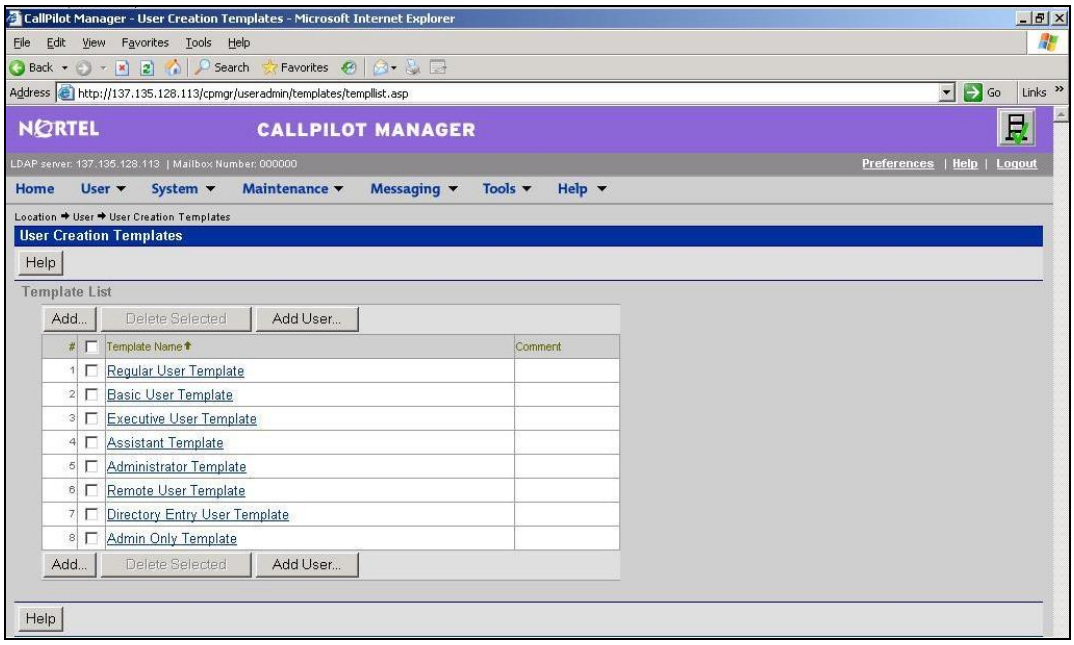

Figure 6.3.8: User Creation Templates Browser Page

Lesson Content: User Templates, continued

User Creation Template Contents

The User Creation Templates browser page includes the following items:

- A Print button, which lets you print a time-stamped list of all configured mailbox classes.
- A Help button, which provides direct access to online information and procedures specifically related to the items on the page.
- An Add button, which opens a blank User Template Details page that you can use to create a new template.
- A timesaving Add User button, which lets you direct access to the Express Add User page, where you can add users to your new template. To add a user, you only have to fill in the user's name, mailbox number, and password, and then make changes to the default feature settings where desired.
- A table lists the names of templates on your system with corresponding Comments section. By clicking a name, you link to the associated User Template Details page that contains the settings for that specific template. You can use the template as is, or you can duplicate, rename, and modify it.
- A check mark in the box to the left of the Template Name lets you use the Delete Selected button.

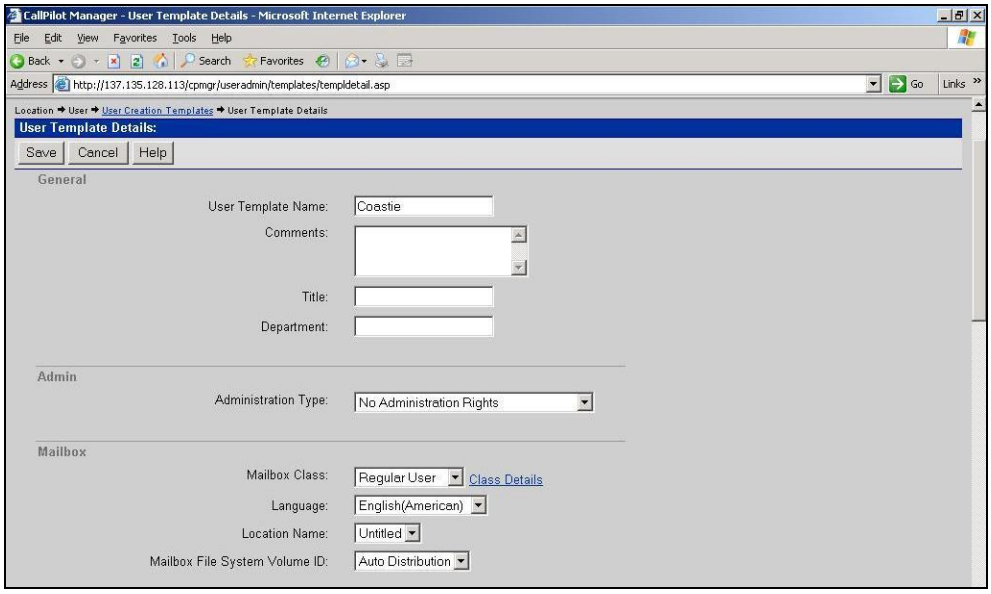

Figure 6.3.9: User Template Details

Lesson Content: User Templates, continued

User Templates Detail Page

To customize settings for a new user group, you can access a blank template by clicking New in the User Creation Template browser page If you prefer you can also click one of the existing templates that contains settings similar to the ones you need, duplicate it by clicking the Save As button, rename it and customize the settings.

General Section

The fields that you administered in the General section of the Blank User Template Details page are shown below:

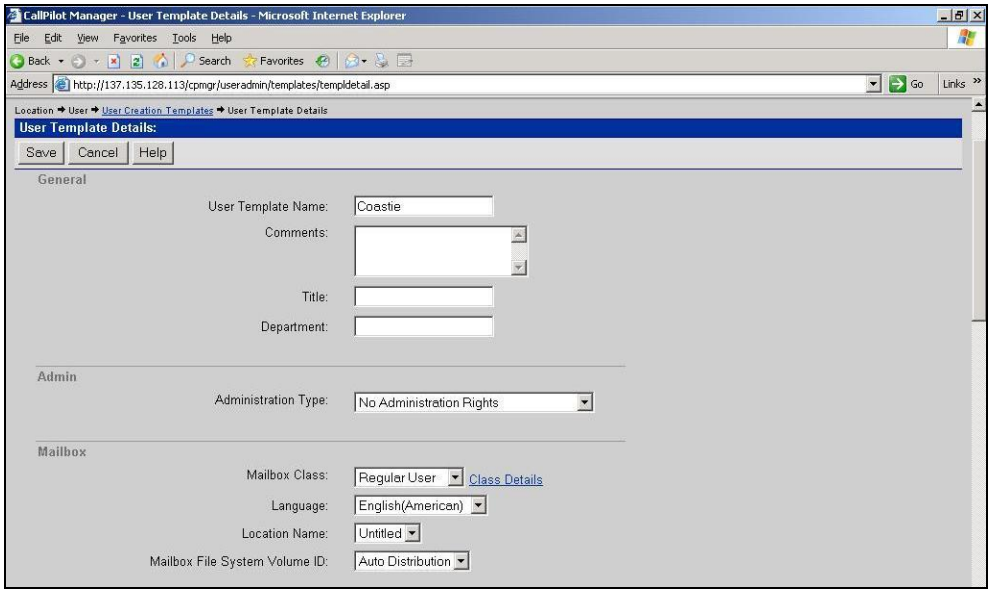

Figure 6.3.10: User Template Details

Field	Definition
User Template Name	This field shows the name of the template. It accepts from 1 to 40 alphanumeric characters.
Comments	This text entry field has a limit of 127 characters; it is blank by default.
Title	The title is a text entry field of up to 63 characters; it is blank by default.
Department	This text field allows up to 63 alphanumeric characters; it is blank by default.

Lesson Content: User Templates, continued

Admin Section

You can assign and suspend administrative privileges via the fields in the Admin section.

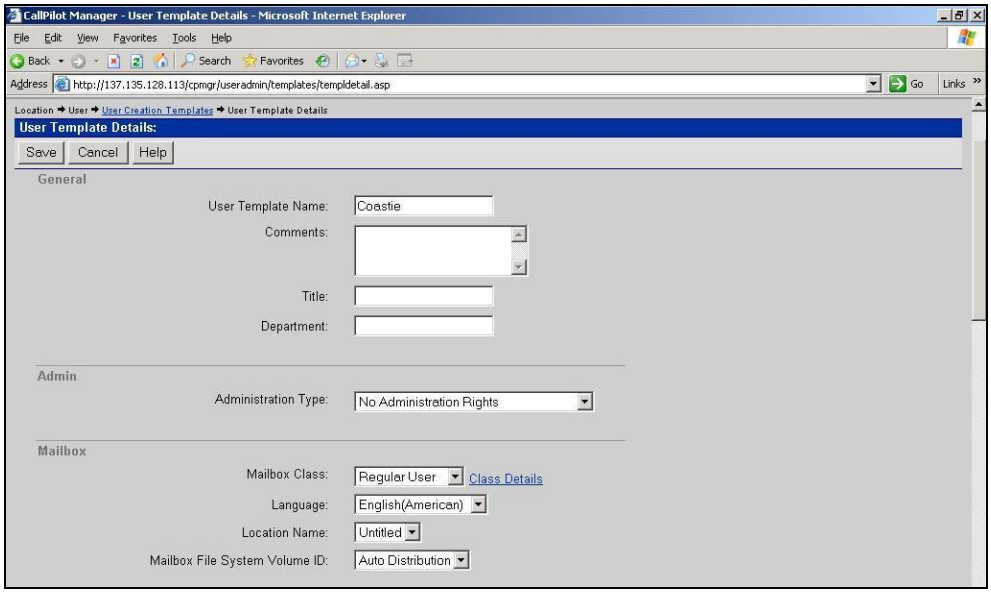

Figure 6.3.11: User Template Details Page

The fields that you administered in the Admin section of the User Template Details page are shown below:

Field	Definition
Administrative Type	The selection in the drop-down box includes the following fields listed below.
No Administration Rights	Check this box for regular mailbox owners who have no rights to administering the CallPilot system.
Users With Some Administration Rights	Check this box for specialized administrators.
Full Administrator	Checking this box gives a mailbox owner access to all administrable parts of the CallPilot system.

Lesson Content: User Templates, continued

Mailbox Section

The Mailbox section contains all of the fields associated with a user's mailbox.

Use the fields in the Mailbox section to change a mailbox owner's mailbox class and change a mailbox owner's preferred language.

Field	Definition
Mailbox Class	This field determines the mailbox class to which the user belongs. The drop-down box lists all the mailbox classes that were defined on the system. No practical maximum number of mailbox classes is available.
Language	Use this field to set the preferred language for the CallPilot prompts for this particular user. The drop-down box lists all the languages installed on your system.
Location Name	This field represents the name of the site where the user is located as selected from the drop-down list. The name can be up to 20 alphanumeric characters. The installation team configures the location names when they add locations to the system.
Mailbox File System Volume ID	This field specifies the hard disk volume to which the user is assigned. The volume ID indicates where messages for the user and related information are stored. All users must be assigned to a volume. **NOTE:** You cannot change this volume later. Rather, you must delete the mailbox and re-create it.

DNs Section

Use the field in the DNs section to set the call answering options for mailbox class members.

Field	Definition
Revert DN	The number entered in his field is the number to which calls are passed if the caller presses 0 during a call answering session, or when the caller waits more than two seconds to enter # after dialing 0. The restriction permission codes that are selected in the user's mailbox class limit the revert DN. The field is blank by default, and can be up to 30 digits in length. Users can also configure their own revert DN.

Lesson Content: User Templates, continued

Setup Section

Use the fields in the Setup Section to set the user's mailbox preferences, which lie outside of the user's mailbox class.

The settings for each user are in two sets: those that appear within the mailbox class settings and those that are independent of the mailbox class. If you change the setting within the mailbox class, the changes propagate to all members of that mailbox class. The personal preference fields (those settings outside the bounds of the mailbox class settings) are set on an individual basis for each user in the system.

You have a number of considerations for determining whether fields are administered in the mailbox class or as part of the user preferences. As a rule, those fields that have an impact on hardware resources appear in the mailbox class, and those that are merely preference settings are administered on an individual basis.

Setup Section, contd.

The fields that you administered in the Setup section of the User Template Details page are shown below:

Field	Definition
Short Prompts	When this checkbox contains a check mark, an abbreviated message header plays to the user for the messages that arrive in the mailbox. The reduced message header plays only the message number and status when a message becomes current. This option can reduce the perception of a slow, tedious presentation of information, although type-ahead through the normal message header provides an equivalent, but user-controlled effect. The message envelope contains the complete envelope information, as usual. The default is not enabled.
DTT DTMF Confirmation Required	This field activates only if the Delivery to Telephone option is checked in the mailbox class. This option indicates whether or not a recipient of a Delivery to Telephone (DTT) message is required to confirm that the recipient wants to hear the message by pressing 2. This can help avoid messages being delivered to an answering machine or to the wrong person. When disabled, the message plays on voice detection. The default is not checked.
	Continued next page

Lesson Content: User Templates, continued

Setup Section, contd.

Field	Definition
Auto Play	When you check this option, the messages in the user's mailbox play when the user logs on. Playback begins immediately after login, with the mailbox summary followed by the first message selected. After playing each message, the system pauses for the delay period. If no action is taken, the system automatically advances to the next message, announces its header, and then immediately starts playback. The process continues circling around the message list until the system encounters the first message it played. After all new messages play, the system plays the old (read) messages (if any exist), starting with the oldest read message; however, the user can press the number sign at any time to end playback. You can use Auto Play in conjunction with auto logon to allow totally hands-free message retrieval. While it is not necessary to use commands to play messages, they are honored if used. Use of any command temporarily suspends the Auto Play feature. Playback automatically resumes the next time the user moves to a new message.
Play Call Answering Instruction Prompt	This field lets the administrator set up the system to play an extended prompt when CallPilot answers. The prompt provides further instructions explaining the options available to the caller; for example, stop recording, continue recording, review the message, cancel the message, connect to attendant, and more help. The default is not checked.
Auto Deletion of Invalid PDL Addresses	If this field is checked, the system automatically removes any invalid addresses appearing in a personal distribution list. The default setting is checked.
Name Dialable by External Callers	If you check this option, an external caller can use name dialing to call the user of this mailbox.
Callers Notified of Busy Line	If you check this option, CallPilot plays a special prompt when the called line is busy, informing the caller that the user is on the phone. After the system plays the prompt, it connects the caller to CallPilot to leave a message. If the option is not checked, the caller is immediately connected to CallPilot and given the chance to leave a message. The default is checked.
Continued next page	

Lesson Content: User Templates, continued

Setup Section, contd.

Field	Definition
Message Waiting Indication Options	This setting determines the type of message that causes a message waiting indication on the user's telephone set. One setting covers both voice messages and fax messages. The drop-down box lists options, including All New Incoming Messages, New Urgent, All New and Unsent, All Urgent and Unsent, and None. The default is All New Incoming Messages. The field must be set to None for users that do not have a physical telephone set, but do have a mailbox.
Block Incoming Messages	The mailbox class assigned to the mailbox owner determines the default amount of server space allocated to each mailbox. To control resource usage, the mailbox class can specify that when a mailbox is full, new messages are always blocked from the mailbox. Otherwise the messages can never be blocked for mailbox class members. Blocking options include: Never: Enable this option if messages can never be blocked for the mailbox class members. Only if the temporary absence greeting is recorded: Select this option when you want incoming messages blocked if the mailbox owner has a recorded temporary absence greeting. Always: Select this option when you always want incoming messages blocked.
Block Message Call Handling	If you are using message blocking for mailboxes in this class, click one of the Block Message Call Handling options: Transfer caller to Revert DN: To specify the Revert DN for this mailbox, locate the DN's setting, and type the number to which the calls are to be transferred in the Revert DN box. Disconnect caller after greeting.

Lesson Content: User Templates, continued

Remote Notification Section

Use the fields in the Remote Notification section to configure remote notification for a mailbox owner.

Use the fields in the Remote Text Notification section to configure CallPilot to notify individual mailbox owners of new messages via an email message. Mailbox owners can receive email notification from any communications device that supports the SMTP protocol, including handheld organizers or mobile phones such as Research in Motion BlackBerry devices.

NOTE: If a mailbox owner requires email notification to a device that uses mail forwarding, such as BlackBerry Internet Edition, you must set up the email client and communications device. For information about setting up a BlackBerry device with Outlook, see the CallPilot User Guide for Email Notification.

Security Section

You can use the field in the Security section to defer access to new mailboxes.

The fields that you administered in the Security section of the User Template Details page are shown below:

Field	Definition
Login Status	Select Disabled or Enabled from the drop-down box for the mailbox owners. If you are configuring mailboxes ahead of time, you can disable the mailbox owners from the ability to log into their mailboxes until a later time.

Practice Activity: Creating User Templates

Directions Build a custom User Template using Work Order 27.

Lesson Content: Shared Distribution Lists

Creating and Maintaining SDLs

A distribution list is a mailing list that allows you to send the same message to a group of people. After you create and save a distribution list, you can reuse it whenever you need to send messages to the same group of people.

Creating SDLs

You must have the capability to administer SDLs enabled within your mailbox class. To create a Shared Distribution List, the administrator specifies the mailboxes to be included, assigns a unique number to that list, and records a spoken name or title for the list. The administrator can create up to 150 SDLs containing up to 999 entries each.

To use SDLs, a mailbox owner must belong to a mailbox class that provides permission to use shared distribution lists. When composing a message, the user simply specifies the distribution list number as they would with any other mailbox number. The title plays when the user enters the distribution list number. CallPilot deposits the message in every mailbox included in the list when the user sends the message.

Contents of SDL

Distribution lists can include:

- Mailbox numbers of local voice users
- Permanent remote voice users
- Directory entries

Remote notification targets, Delivery to Telephone (DTT), and SDLs do not have mailboxes associated with them, and therefore cannot be included in a distribution list. An exception occurs if you add a DTT target as a local directory entry. You could then include the local directory entry in a distribution list.

CallPilot functionality provides two types of distribution lists: Shared Distribution Lists and Personal Distribution Lists. This lesson deals with Shared Distribution Lists.

SDLs can help minimize the need for mailbox owners to create Personal Distribution Lists (PDLs), which saves storage resources. PDLs are accessible to the user who created them. The user can send a recorded message to all the mailboxes contained in the list. A mailbox owner can create up to 99 PDLs, each containing a maximum of 200 mailboxes.

Lesson Content: Shared Distribution Lists, continued

Accessing the SDL

The administrator creates Shared Distribution Lists by clicking User > Shared Distribution Lists.

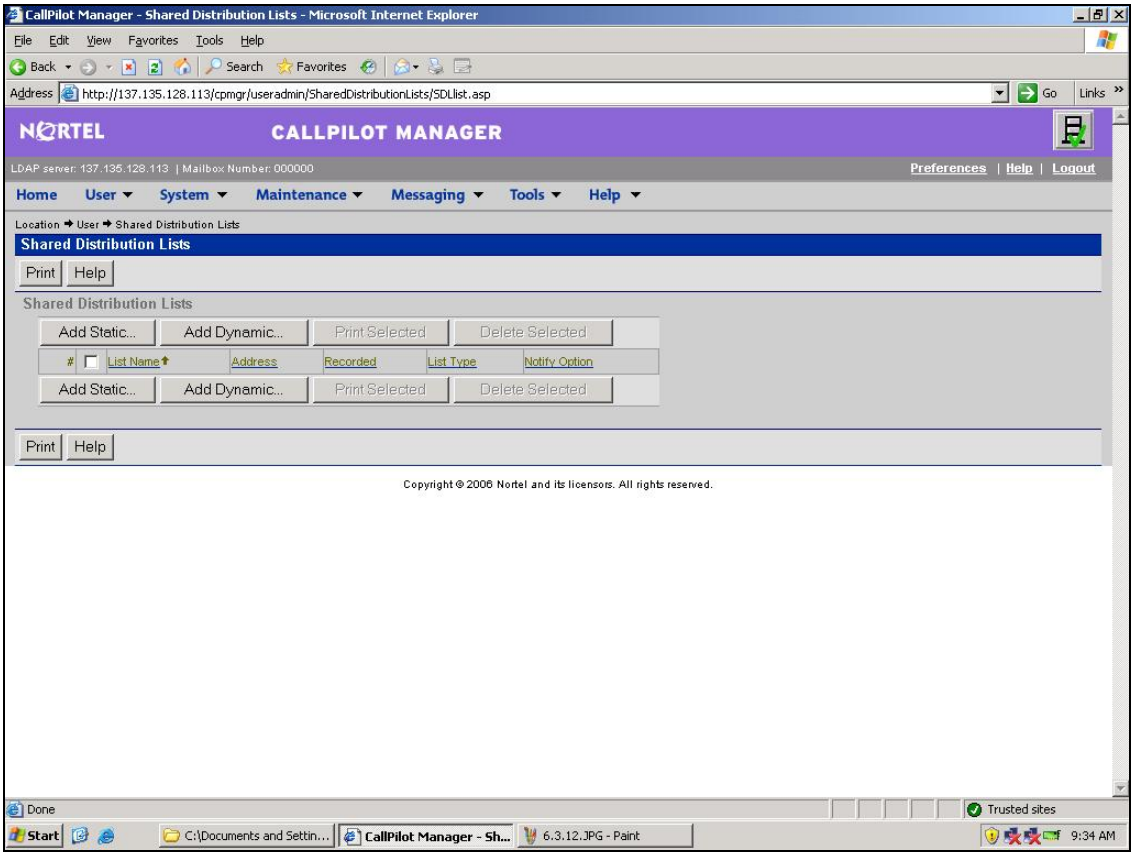

Figure 6.3.12: Shared Distribution List Page

The Shared Distribution Lists (SDL) page allows the administrator to view all Shared Distribution Lists that have been created within that customer group, as well as create new shared distribution lists. The Shared Distribution List page shows the list Name, Address, and Recorded status of each distribution list.

- Print: Click Print to print the SDL Listing.
- Help: The Help button offers help on SDLs.
- Delete Selected: To delete one or more the SDLs, click to make a check mark in the appropriate checkbox located on the left of the List Name. Then click the Delete Selected button. This action is an irretrievable step, and you must always confirm that you do want to delete an SDL.

Accessing the SDL, contd.

- Add...: The Shared Distribution List page contains an action button for adding a new SDL. The Shared Distribution List Details page appears when you click Add....

The Shared Distribution Lists Details page allows the administrator to create a new distribution list. Following is a description of the fields located on the Shared Distribution List Details page.

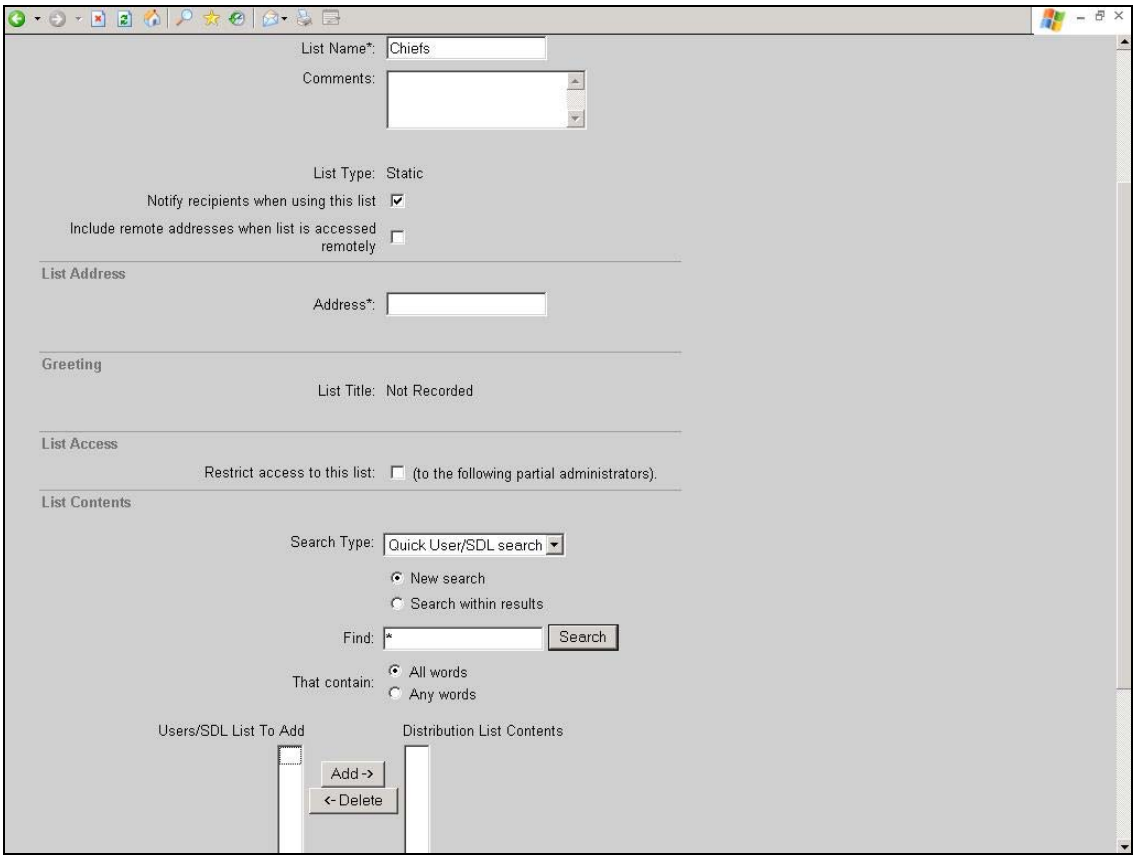

Figure 6.3.13: Shared Distribution List Page, Showing Data Entry Fields

Lesson Content: Shared Distribution Lists, continued

SDL Fields

The fields on the Shared Distribution List are described below.

Field	Definition
General Section	
List Name*	Use this field to type the title of the SDL. You can enter up to 41 characters in the field.
Comments	In the comments box, record the address change and the date, along with the reason for the creating or changing the SDL.
List Address Section	
Address*	Enter a unique number between 3 and 18 digits that identify their shared distribution list when addressing from the phone set. It must not conflict with any other numbers. The valid range is 18 digits (only numbers are allowed). The list number cannot be the same as the following numbers: Personal distribution list numbers (The digits 1 to 99 are reserved.) Any mailbox number including the broadcast mailbox number (The default is 5555.) A directory entry's DN If a distribution list and a local directory entry share the same number, the distribution list number will take precedence over the local directory entry number during composition. The name dialing prefix The delivery to telephone prefix Another distribution list number Any dialing plan access code prefixes
Greeting Section	
List Title	Recorded (or Not Recorded) List title recorded (voice): This read-only field indicates whether or not a list title has been recorded for this list. You can change this field by accessing the saved SDL and using the Record button to record (or delete) a list title. You can also use the Import button to import a pre-recorded list title.

Adding Existing User to SDL

You can add an existing user to a SDL and add a new user to an existing SDL. Use the procedure below to add an existing user to SDL.

How to Add Existing Mailbox Owner to SDL	
Step	**Action**
1	From Users>Shared Distribution Lists, click the list name of the SDL to which you want to add a name or change. This action opens the Shared Distribution List Details page.
2	Scroll to the List Contents settings.
3	Using a quick search, an advanced search, or a saved search, find the mailbox owners you want to list in the Users To Add box.
4	For each mailbox owner you want to add to the list: Click the name of the mailbox owner. Click the Add button.
5	Click Save.
End of procedure	

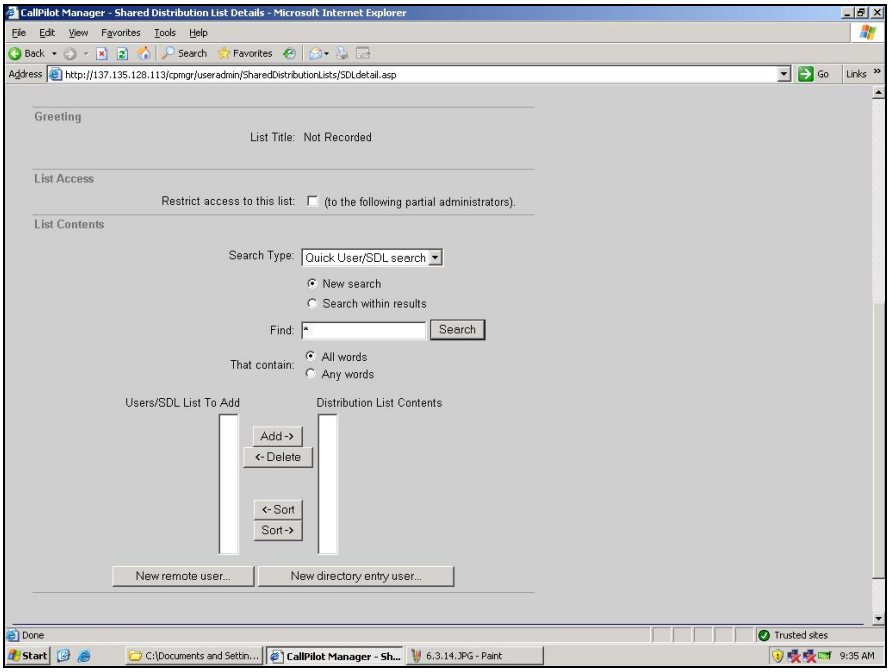

Figure 6.3.14: Shared Distribution List Page, Showing Data Entry Fields

Lesson Content: Shared Distribution Lists, continued

Adding New User to SDLs

You can add a new user to a SDL by following the procedure below.

How to Add New Mailbox Owner to SDL	
Step	**Action**
1	Type the required information. Each required field is marked with an asterisk (*).
2	For each mailbox owner you want to add to the list: Click the name of the mailbox owner.
3	Click the Add button. The Results page displays the information added to the CallPilot database.
4	To add another individual, click the Add Another User button.
End of procedure	

Delete Mailbox Owner from SDL

To delete mailbox owners from an SDL use the following procedure below:

How to Delete Mailbox Owner from SDL	
Step	**Action**
1	Locate the SDL that contains the mailbox as an entry by accessing User>Shared Distribution Lists.
2	Click the list name of the SDL you want to change.
3	Scroll to the List Contents settings.
4	For each mailbox owner you want to delete from the list: In the Distribution List Contents list, click the name of the mailbox owner. Click the Delete button.
5	Click Save.
End of procedure	

Practice Activity: Shared Distribution Lists

Directions Build a Shared Distribution List using Work Order 28.

Lesson Content: Adding Users

Adding Mailbox Users

You can set up individual mailboxes one at a time, or you can add a group of mailboxes all at one time. This section deals with adding individual mailboxes.

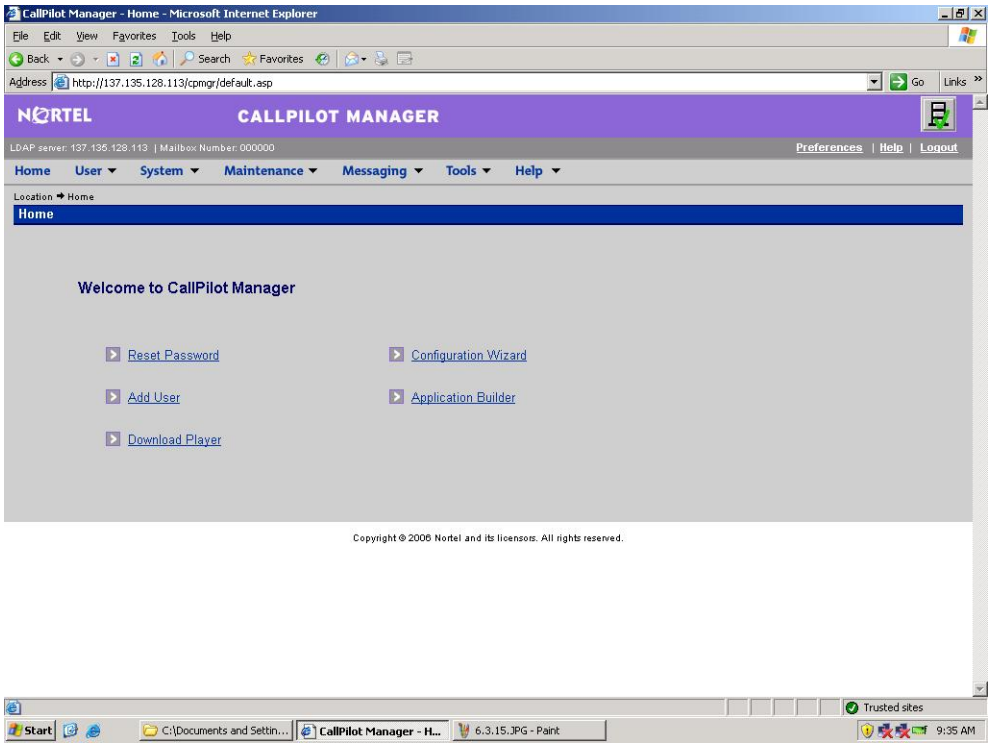

Figure 6.3.15: CallPilot Main Page

Lesson Content: Adding Users, continued

Navigational Paths for Adding Mailboxes

CallPilot Manager provides more than one navigation path to pages used for adding mailboxes.

- From the CallPilot Manager home page, click the shortcut titled Add User to access the Express User Add page.
- From the CallPilot Manager banner, click User >Add User to access the Express User Add page.
- On the User Template page, then click the Add User button to access the Express User Add page.

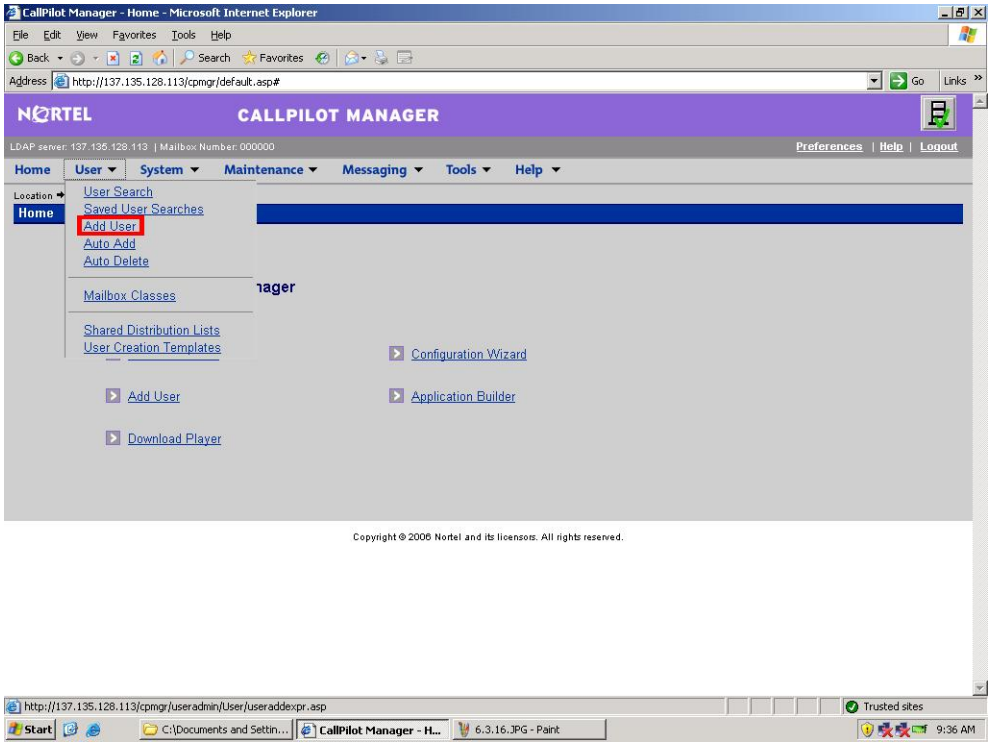

Figure 6.3.16: CallPilot Main Page, Showing the User Menu

Lesson Content: Adding Users, continued

Preparing to Use Express User Add Page

Before you begin adding a user, you need the following:

- The first and last name of the mailbox owner
- The name of the applicable user-creation template
- The mailbox number (extension DN)
- Any shared distribution lists to which the mailbox must be added (optional)

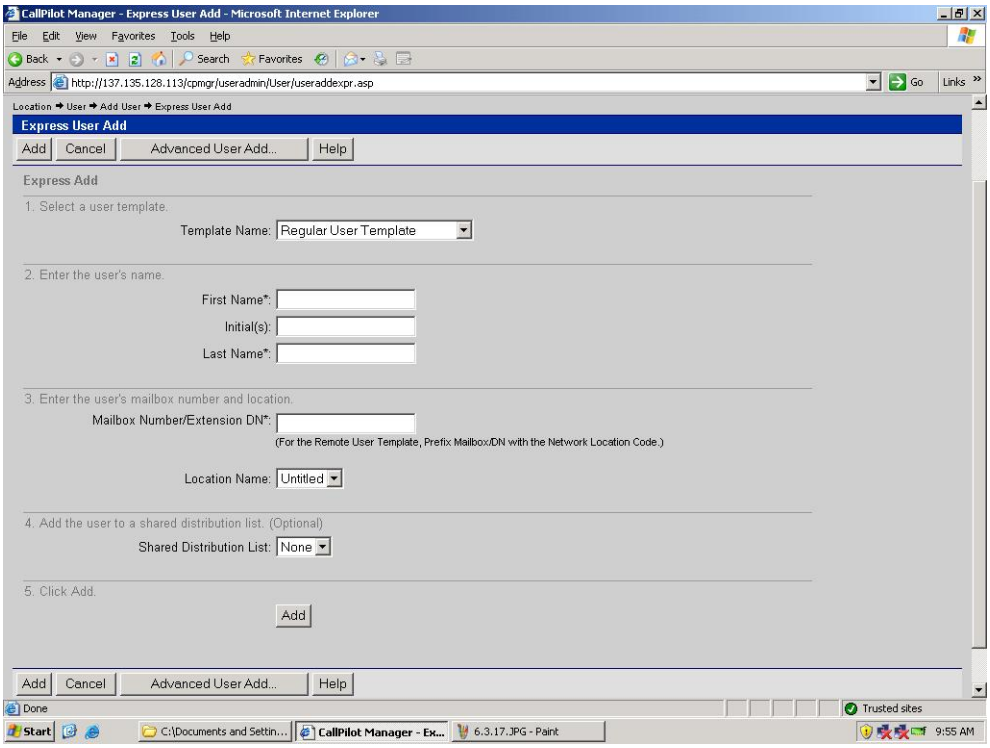

Figure 6.3.17: Express User Add Page

Lesson Content: Adding Users, continued

Express User Add Fields

The following table describes the fields on the Express User Add page:

Field	Definition
Template Name	From the listing, click the name of the appropriate template needed to create the mailbox for the user you are adding.
First name*	Type the given name of the user in this field. The First Name field can accept any alphanumeric characters, with a field limit of 63 characters. The field is blank by default.
Initial(s)	Initials can include up to five characters; the field is blank by default. You can use initials to differentiate between users with common first and last names.
Last name*	Type the family name of the user up to 63 alphanumeric characters. You cannot save the user input unless you complete this field.
Mailbox Number/Extension DN*	The messaging number is mandatory for a CallPilot messaging user. The mailbox number cannot conflict with the following numbers: The broadcast number (The default is 5555.) Other DNs or the name dialing prefix Delivery to telephone prefixes System distribution list numbers Other mailbox numbers AMIS compose prefix NMS location prefixes The primary DN must be unique on the system.
Location Name	From the location list, click the server where the mailbox resides.
Shared Distribution List	From the listing, click any Shared Distribution Lists (SDLs) to which the mailbox owner must be added.

Advanced User Add

To display the user creation template and enter additional information for the new mailbox owner, click the Advanced User Add button on the Express User Add page. You can also click the context-sensitive Help button on the Express User Add page to access the User Detail help page. Click any procedure you may need to perform, and the system will link you to the page containing the relevant steps.

Practice Activity: Adding User Mailboxes

Directions Add user mailboxes using Work Order 29.

Lesson Content: User Search

Managing Users

The following three sections deal with searching, modifying, and deleting users.

Searching for Users

CallPilot enables you to conduct searches for the following items:

- Mailboxes
- Mailbox owners
- Groups of users that satisfy an asset of search criteria

CallPilot also allows you to re-use a saved search.

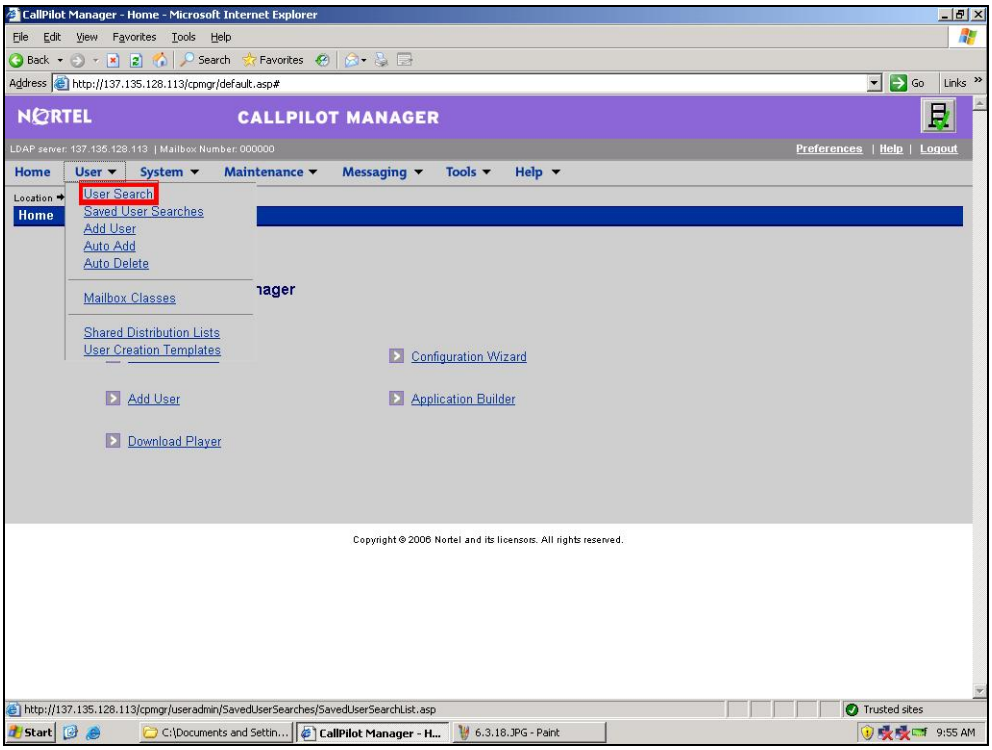

Figure 6.3.18: CallPilot Main Page, Showing the User Menu

Lesson Content: User Search, continued

Accessing User Search

From the CallPilot Manager menu banner, click User > User Search.

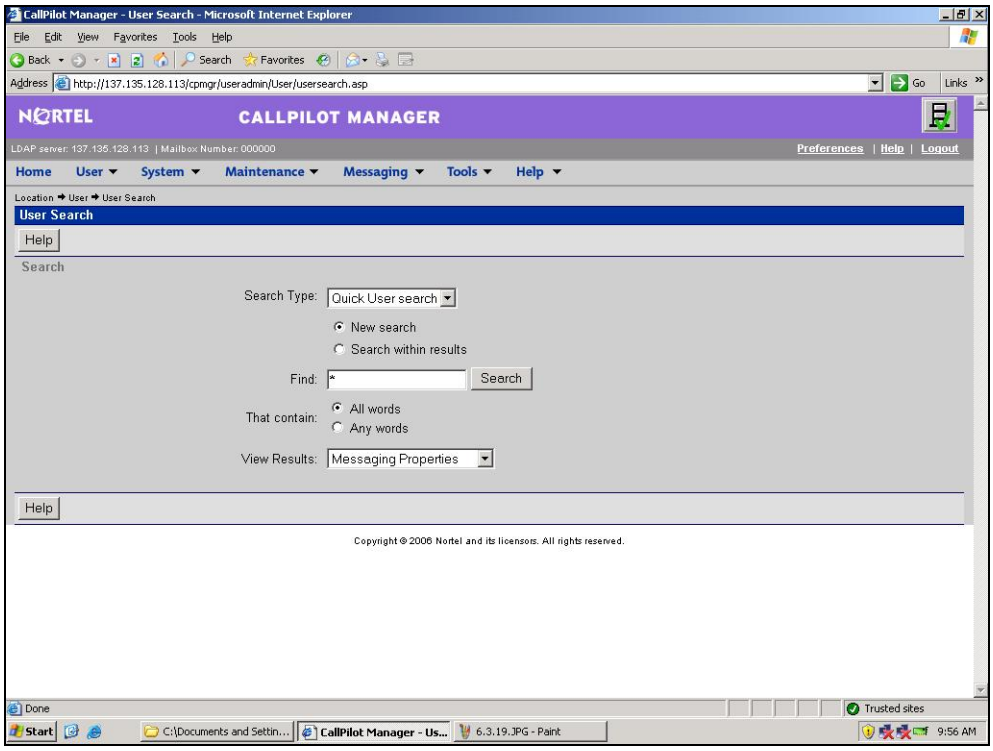

Figure 6.3.19: User Search Page

Lesson Content: User Search, continued

User Search Fields

Field	Definition
Search Type	This field includes the following: Quick Search Advanced Search Saved Search
New Search	Click the New Search radio button to display a User Search page with a blank Find field. Use this field to redefine your search criteria.
Search within Results	Click this radio button to search within previously “found” information. Another user search blank Find field appears for you to use in redefining at least one of the search criteria.
Find	Type at least part of the user's last name, first name, or mailbox number.
That contains: All Words	If you typed more than one word in the Find box, specify whether you want the system to find all words as opposed to any words that you typed.
That contain: Any words	If you typed more than one word in the Find box, specify whether you want the system to find any words as opposed to all the words that you typed.
View results	Use the listing in the drop-down box to select the type of information that you want to see about the found users. The options include: Messaging Properties General Properties Administrative Properties Search

Search Results

After you click the Search button, the results at the bottom of the User Search page are displayed. As shown on the next page.

Lesson Content: User Search, continued

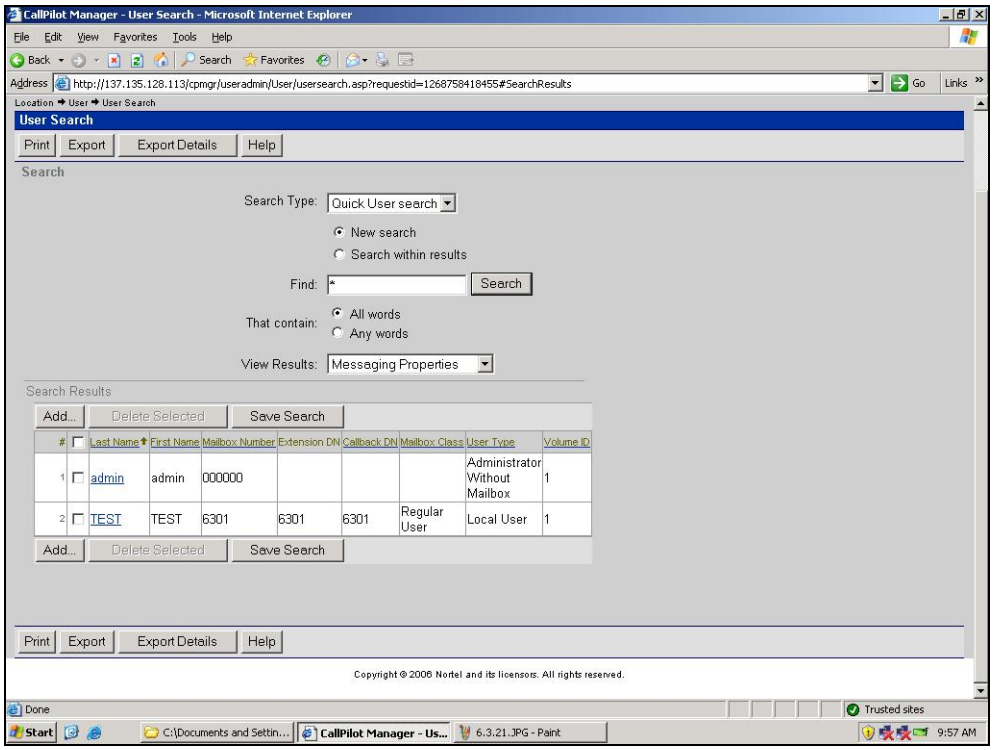

Figure 6.3.20: User Search Page, Showing Results

Search Results

Following is a list of search results fields:

Field	Definition
Add...	From the Search Results box, you can click the Add button to directly access an Express User Add page, where you can add a mailbox owner or administrator that is missing from the group.
Delete Selected	Click the checkbox to the left of the Last Name column to use the Delete Selected button to delete the mailbox owners or administrators indicated by the check mark.
Save Search	Click Save Search to label and save search filters so that commonly used "finds" do not have to be defined each time. A prompt box appears telling you to enter a description for the saved search.

Lesson Content: User Search, continued

Advanced Search

To create and use a set of search criteria using the Advanced Search functionality, click the Advanced Search button from the drop-down list on the User Search page.

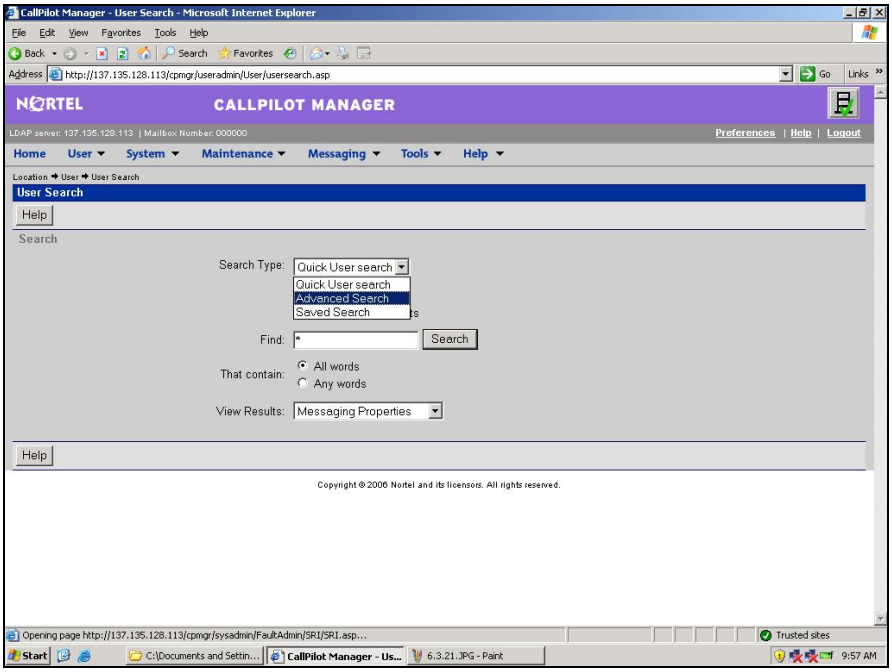

Figure 6.3.21: User Search Page, Showing Advanced Search Selection

Define at least one search criterion. In the first Search Criteria list, select the type of information you need.

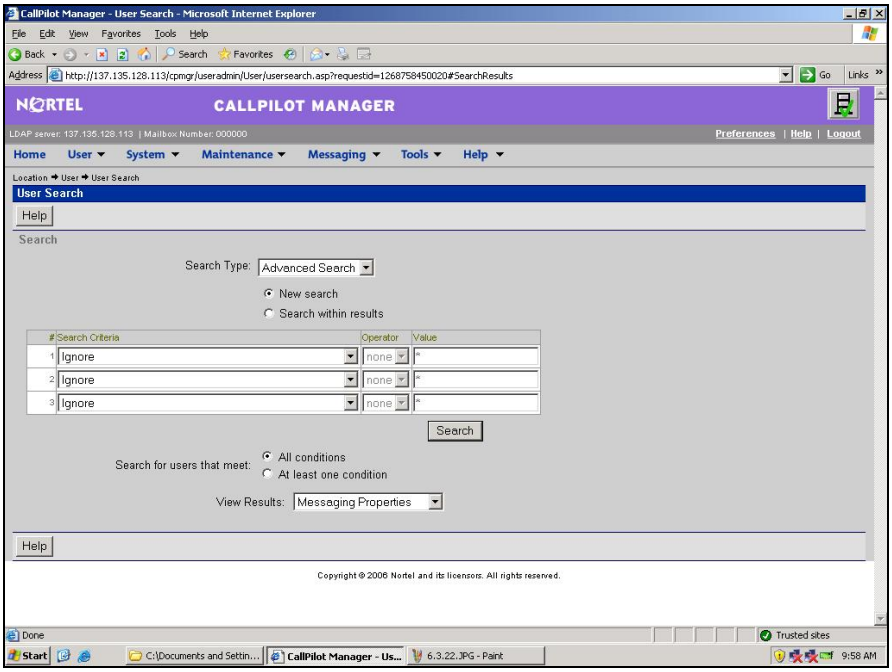

Figure 6.3.22: User Search Page, Showing Advanced Search Criteria

Lesson Content: User Search, continued

Using a Saved Search

You can re-use a user search after it has been saved.

You can use search results to help with your administrative tasks. Examples of how to use the search results include:

- To view a different page of search results, click the page number link at the bottom of the User Search page.
- To sort the research results on a different field, click the column name on which you want to sort.
- To modify the type of information shown in the View Results list, select the type of information that you want to see about the found users, and then click the Search button.
- To delete one or more of the found mailbox owners, ensure there is a check mark in the appropriate checkbox, and then click the Delete Selected button.

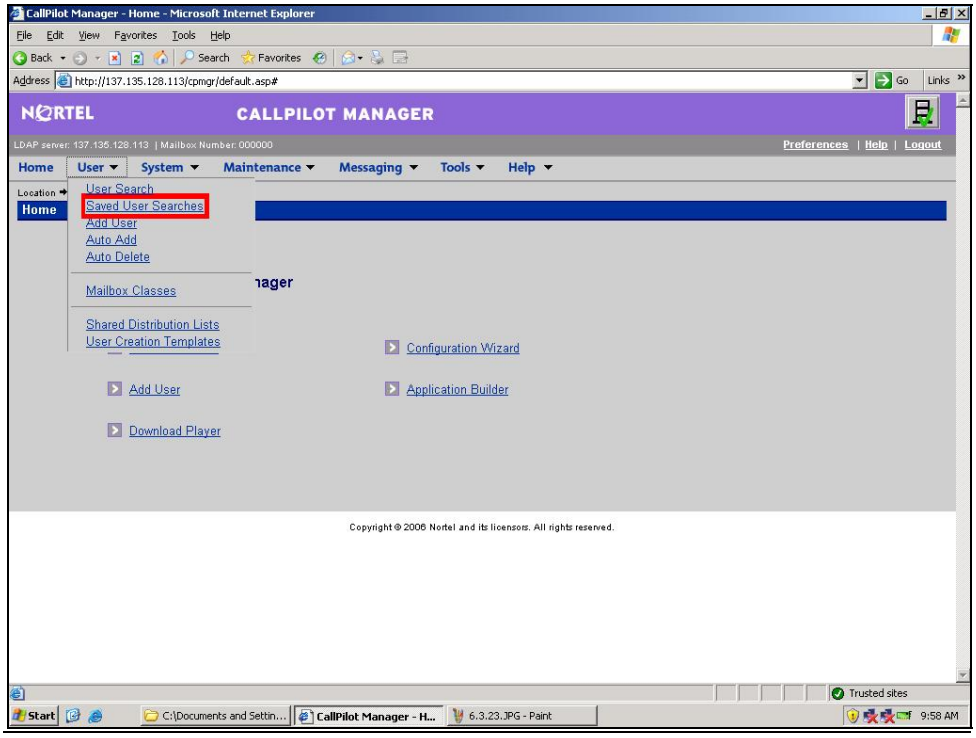

Figure 6.3.23: CallPilot Main Page, Showing the User Menu with Saved User Searches Selected

Lesson Content: User Search, continued

Accessing Saved User Searches

From the CallPilot Manager menu banner

Step	Action
1	Click Users > Saved User Searches. The Saved User Searches page displays a listing of your saved user searches.
2	From the list of saved user searches, click the name of the saved search you want to use. The Search Results page appears.
3	The Search Results area of the User Search page lists all the mailbox owners found by the search. Click the Search button, and view the modified search results.
End of procedure	

Lesson Content: Mailbox Administration

Modifying User's

Daily maintenance of the CallPilot database involves a variety of tasks. This section describes some of the more common tasks. This section explains some of the more complex tasks, such as modifying a user's profile.

Modifying a User's Properties

To modify a user's properties, navigate to the pages where the original user data was entered, and change those entries. This can be done by clicking Use > User search, finding the user by one of the search methods, displaying the properties of that user on the User Details page, and then modifying the user data.

Re-enabling a Disabled Mailbox

The system disables a mailbox if users make too many logon attempts using the wrong password, or if no one uses the mailbox for a long time. You can re-enable the mailbox by clicking User > User Search. Find the mailbox owner's User Details page. Scroll to the Security settings. In the Login Status List, click Enabled. Click Save.

Resetting a User's Mailbox Password

From the Call Pilot Manager home page, click the shortcut Reset Password. Enter the applicable mailbox number in the Mailbox Number field. Click Save.

Increasing User Storage Space

You can modify storage for a specific mailbox class by clicking User > Mailbox Class. The Mailbox Classes page displays. In the Class Name column, click the mailbox class applicable to the mailbox owners who need storage changes. Scroll to the Resource Usage Controls section. You can change the storage and retention settings for all voice and fax items, as follows:

Field	Definition
Mailbox Storage Limit (for all media)	Total minutes of message recorder prompts that mailbox owners can store
Max Composed Message Length	Number of seconds allowed for the longest composed message
Max Call Answering Message Length	Number of seconds allowed for the longest received message

Lesson Content: Mailbox Administration, continued

Enabling or Disabling Auto Login

You can reach the Auto Login settings by clicking User > User Search. Find the mailbox owner's User Detail page. Scroll to the DNs settings. To enable Auto Login for an associated DN, ensure there is a check mark in the corresponding Auto Login checkbox. To disable Auto Login for an associated DN, ensure the corresponding Auto Login checkbox is clear. Click Save.

When Auto Login is enabled, the user does not need to enter a mailbox number or password to gain access to CallPilot. When the option is not checked, the user must enter a mailbox number and password. Therefore, for reasons of mailbox security, this option typically should not be checked, unless the phone set or wireless devices of the users who belong to this mailbox class are kept in a secure location, and users have a valid need for this feature.

For a user to enable or disable Auto Logon for their mailbox, the user must be logged into the mailbox. If no DNs have Auto-Logon enabled in the user's profile, the user cannot enable Auto Logon from a phone set.

To prevent unauthorized access to a mailbox, CallPilot disables Auto Login for all DNs whenever an associated DN is added to the user's DN list. The enabled DNs remain enabled in the user's profile, but the user must re-enable Auto Login from the phone set.

Deleting a User

To delete a user:

Step	Action
1	Click User > User Search and use one of the search methods to find the mailbox owner.
2	In the Search Results list, click the empty box to the left of the user's last name.
3	Click the Delete Selected button. A warning that the action is irreversible always follows the Delete Selected command. CallPilot gives the administrator an opportunity to cancel the delete action.
End of procedure	

Practice Activity: CallPilot Move, Add, Change (MAC)

Directions Complete Work Order 30.

Summary

Lesson Summary

In this lesson, you learned about the basic day-to-day administration of CallPilot Manager. Upon completion of this student guide and after the lesson presentation and practice exercise, you should be able to:

7.5 **PROGRAM** mailbox classes using CallPilot Manager with 100% accuracy.

- **7.5.1** **REVIEW** manufacturer's documentation
- **7.5.2** **DETERMINE** customer configuration

7.6 **PROGRAM** user creation templates using CallPilot Manager with 100% accuracy.

- **7.6.1** **REVIEW** manufacturer's documentation
- **7.6.2** **DETERMINE** customer configuration

7.7 **ADD** voicemail boxes using CallPilot Manager with 100% accuracy as evidenced by a positive function check.

- **7.7.1** **REVIEW** manufacturer's documentation
- **7.7.2** **DETERMINE** customer configuration
- **7.7.3** **PERFORM** function check

7.8 **PROGRAM** distribution lists using CallPilot Manager with 100% accuracy as evidenced by a positive function check.

- **7.8.1** **REVIEW** manufacturer's documentation
- **7.8.2** **DETERMINE** customer configuration
- **7.8.3** **PERFORM** function check

7.10 **PERFORM** a voicemail Move, Add and Change (MAC) using CallPilot Manager with 100% accuracy as evidenced by a positive function check.

- **7.10.1** **REVIEW** manufacturer's documentation
- **7.10.2** **DETERMINE** customer configuration
- **7.10.3** **PERFORM** function check

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Lesson 4

SYSTEM MENU

Overview

Overview

In this lesson you are introduced to CallPilot Manager's System Menu. You perform the following tasks:

- Define server settings
- Backup and restore data
- Set up service directory numbers (SDNs)
- Define alarm monitors
- Configure the event browser
- Review the performance monitor
- Set up an OM configuration

This lesson provides you with the key performance elements to use the System menu of the CallPilot System. You start this lesson by discussing backup and restore procedures, and then performing the backup and restore process using the job aids in this lesson. This lesson ends with a discussion on how to setup service directory numbers (SDN) using SDN tables. A performance evaluation at the end of this lesson tests comprehension of the key performance elements that you need to perform for upcoming tasks.

Performance Objectives

Upon successful completion of this lesson, you will be able to:

7.11 PERFORM a voicemail database backup with 100% accuracy..

7.11.1 REVIEW manufacturer's documentation

7.11.2 COMPLETE unit documentation

7.12 PERFORM a voicemail database restore with 100% accuracy as evidenced by a positive function check..

7.12.1 REVIEW manufacturer's documentation

7.12.2 PERFORM function check

7.12.3 COMPLETE unit documentation

7.13 PROGRAM a Service Directory Number (SDN) with 100% accuracy as evidenced by a positive function check.

7.13.1 REVIEW manufacturer's documentation

7.13.2 DETERMINE customer configuration

7.13.3 PERFORM function check

7.13.4 COMPLETE unit documentation

Overview, continued

Performance Evaluations

The performance evaluations for these tasks are scheduled during this lesson. These performance evaluations will be in delivered via practice activities. These work orders will test the performance. You will work in your booth with your partner as a class. Your instructor will sign off these performance evaluations as you complete each task.

References

The information in this lesson can be found in the following reference:

- CallPilot Administrator's Guide—NN44200-601_01.21

Tools and Equipment

The tools and equipment used for this lesson are:

- CallPilot Server
- Call Server

Job Aids

The job aids for this lesson are:

- How to Archive Files
- How to Restore from an Archive

Handouts

There are no handouts for this lesson.

Overview, continued

Key Terms

Review the following key terms before you begin the reading assignment.

Terms	Definitions
Archives	Archives are copies of multimedia files from CallPilot. Archives are used to: Support recovery from inadvertent deletion of a user's messages or mailbox, personal distribution lists (PDLs), greetings, personal verifications, customized prompts, and custom applications Import custom applications from another system • Import mailboxes from another system
Backups	Backups are performed frequently and regularly to prevent data loss so that you can: Save and restore a complete set of system and multimedia data files from your CallPilot server in the event of disk drive failure or corrupted or lost configuration and messaging data Protect against data loss due to theft or damage caused by natural disasters Use backups to migrate data to a different CallPilot platform

Pre-Lesson Work

There is no pre-lesson work for this lesson.

Lesson Content: CallPilot Manager > System Menu

System Menu The CallPilot System Menu options are displayed below.

CallPilot Manager Menu					
User Menu	**System Menu**	**Maintenance Menu**	**Messaging Menu**	**Tools Menu**	**Help Menu**
User Search	Server Settings	Maintenance Admin	Messaging Delivery Confirmation	Configuration Wizard	CallPilot Administration Help
Saved User Searches	Backup and Restore	Multimedia Monitor	Message Network Configuration	My CallPilot Configuration	About CallPilot Manager
Add User	Service Directory Number	Channel Monitor	Network Diagnostics	Download Player	
Auto Add	Alarm Monitors		Internet Mail Clients		
Auto Delete	Event Browser		External Email Servers		
Mailbox Classes	Performance Monitor		Messaging Management		
Shared Distribution Lists	OM Configuration		Dialing Information		
User Creation Templates			Holidays		
			Outcalling Administration		
			Restriction Permission List		
			Notification Device Classes		
			System Prompt Customization		
			Security Administration		

Lesson Content: Archiving and Restoring Resources

Overview

This resource provides information to archive applications, customized prompts, and mailbox information. It also discusses how to restore from archives.

An administrator with the appropriate access level can use the CallPilot Manager Backup and Restore functionality to perform the tasks listed below:

- Use the archives to copy data to tape or to a disk
- Archive files to server tape or to a remote disk drive
- Schedule archives or perform them immediately
- Restore archived information

Archiving

Archives apply only to text and voice data for CallPilot. You can perform an archive online while the system is running. Using an archive, you can restore data from tape or disk to the system, still online, to satisfy a user request.

Three kinds of data can be archived:

- Application Builder Archives
- User Archives
- Prompt Archives

Limitations

You must be aware of the limitations for archiving:

- Archives do not save switch-related setup, operational measurement data, event logs, alarms, system security settings, the networking setup, or queues of undelivered and time-delayed messages.
- If you restore one or more messages from a user archive, they are added to the messages currently in the destination mailbox. The mailbox owner might complain that deleted messages re-appear in the mailbox.
- You cannot selectively restore customized prompts from a prompt archive.

Using Application Archives

Archive an application to preserve the information contained in it. Use archives to support recovery from inadvertent deletions of your applications and to port custom applications from another system.

Nortel Networks recommends that you define at least one application archive and back up to application archives weekly. If you create a new application, you must add it manually to the application archive in which the new application belongs. The system does not automatically update application archives.

Using Mailbox (User) Archives

Most customers define a single user archive for all mailbox information, and schedule the archive to run daily, during a period of light system traffic.

When you add or delete mailboxes, administrators, or directory entries, you do not have to manually redefine the archive to reflect the changes before you back up mailbox information to the archive. This is because the user archive backup process uses CallPilot Manager search functions to automatically update the archive as you back up information.

Defining a Set of User Archives

If your system has more mailboxes than the number recommended to be archived on the device you have configured (disk or tape), define a set of user archives, where each archive contains no more than the recommended number.

You can define a user archive around any of the user search criteria. For example, you can:

- Define a separate archive for administrators
- Define a different archive for each department or location
- Archive mailboxes in numeric segments (for example, mailboxes 7*, 8*, and so forth)
- Archive mailbox owners by last name in alphabetic segments

Using Prompt Archives

Define at least one prompt archive for each language installed on your CallPilot server. Back up prompt information to these archives each time prompts are updated.

Lesson Content: Archiving and Restoring Resources, continued

Archiving Procedures

The procedure to archive files is essentially the same for all three types of archives, including applications, personal user data, and customized voice prompts.

To define an archive, access System>Backup/Restore. The Backup/Restore browser page appears.

How to Archive Files	
Step	**Action**
1	From the View drop-down listing, click Backup.
2	Click the Add Backup button or click the Backup Now button to perform an immediate backup. The Add New Backup Schedule page appears.
3	Click the predefined backup destination device from the Device Name list. If the device you need is not listed, add it to the Device Name list.
4	Select the type of archive you need from the Backup Type list.
5	If you selected User Archive from the Backup Type list, select the mailboxes or administrators from the generated list that you need to archive.
6	If you need to generate a new search to add additional mailboxes, click the Add button again to select additional mailboxes.
7	If you selected Prompt Archive from the Backup Type list, you will see the Custom Prompt Display when the Add New Schedule appears.
8	Select the Backup Frequency (One time only, Daily, Weekly, or Monthly).
9	Select the start date and time, using the 24-hour clock.
10	Type a descriptive name and comments. These will show in the Backup browser list.
11	Click the Finish button to confirm the archive description. The description is now added to the Backup Restore Browser page.
End of procedure	

Lesson Content: Archiving and Restoring Resources, continued

Restoring

You can restore data from an archive without taking the CallPilot system out of service. Access System>Backup/Restore, then follow the steps listed below to restore:

<table>
<tr><th colspan="2">How to Restore from an Archive</th></tr>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the View list, click Restore.</td></tr>
<tr><td>2</td><td>In the Backup Device list, click the backup device that contains the system information you need to restore.</td></tr>
<tr><td>3</td><td>Click the Retrieve Directory button.</td></tr>
<tr><td>4</td><td>From the list of archives, select the archive you want to restore.</td></tr>
<tr><td>5</td><td>If you have selected a user archive:
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the View list, click one of the following: All archived users or Deleted users only.</td></tr>
<tr><td>2</td><td>From the list of archived users, select the ones you need to restore.</td></tr>
<tr><td>3</td><td>Click the Restore button.</td></tr>
<tr><td>4</td><td>For each user being restored, select the ones you need to restore.</td></tr>
<tr><td>5</td><td>Click the Restore button.</td></tr>
</table></td></tr>
<tr><td>6</td><td>From the View list on the Backup Browser page, click Status.
A real-time status display appears.</td></tr>
<tr><td>7</td><td>If the Restore status is either partially successful or unsuccessful, view the log file to determine the problem.</td></tr>
<tr><td colspan="2">End of procedure</td></tr>
</table>

Topic Review: Archiving and Restoring

Directions Select the correct answer.

1. Data that can be archived includes:

   A. Personal verifications
   B. System security settings
   C. Switch related setup data
   D. Operational measurements

2. You can selectively restore customized prompts from a prompt archive.

   A. True
   B. False

3. Most customers define a single user archive for all mailbox information and schedule the archive to run:

   A. One time only
   B. Daily
   C. Weekly
   D. Monthly

4. Nortel Networks recommends that you define at least one application archive and backup to applications archives how often?

   A. One time only
   B. Daily
   C. Weekly
   D. Monthly

Lesson Content: Service Directory Number (SDN)

SDN Overview

The Service Directory Number (SDN) Table lists the DNs associated with specific CallPilot services and applications. You must define a DN for each service or application that you want callers to be able to access directly by dialing a unique DN.

SDN Tables

When a call arrives that requires treatment or routing by CallPilot, the switch gives the caller ringback treatment. At the same time, CallPilot looks up the dialed directory number in the Service Directory Number (SDN) Table.

The SDN Table is the main point of contact when CallPilot receives an incoming call. The following occurs:

- The system looks up the dialed DN in the SDN Table to determine which service or application is being requested by the caller and which prompts to play. If a match is found, CallPilot answers the call using the prompts and call handling associated with the service.
- If no matching number is found in the SDN Table, the system tries to match the DN to a mailbox so CallPilot can perform call answering, such as taking a message from the caller if the user does not answer or if the phone is busy.
- If a CallPilot dialable DN is not defined in the SDN Table or no valid extension DN is associated with a mailbox, CallPilot plays a message to the caller stating that the caller was forwarded to a messaging service, but the person at the extension dialed does not subscribe to the service. CallPilot then transfers the caller to an attendant.

SDNs and Associated Services

When CallPilot was initially installed, the installation team configured the switch for CallPilot services and applications by creating Control Directory Numbers (CDNs) and either phantom directory numbers (DNs) or dummy ACD queues. Then, the installation team recorded the DNs in the SDN Table, and associated a unique, dialable DN to each of the CallPilot services and applications. When a DN is listed in the SDN Table and associated with a CallPilot service, refer to the DN as an SDN. After defining an SDN in the SDN Table, you must publish the number to users of the service.

Lesson Content: Service Directory Number (SDN), continued

What the SDN Table Manages

The SDN Table configuration controls the following:

- Which service should be activated when a number is dialed
- The type of channel the service acquires (voice, fax, or speech recognition)
- The number of channels associated to the service

NOTE: The SDN configuration determines the minimum number of channels guaranteed to a service for simultaneous use and the maximum number of channels that you can use at one time.

- The session behavior for certain services, such as those created with Application Builder (including the maximum session length and a number of fax options)

Types of SDNs

The SDN table contains two types of SDNs: Inbound and Outbound.

- Inbound SDN: CallPilot services that callers dial require an inbound SDN. The inbound SDN associates with the CDN, phantom DN, or dummy queue programmed on the switch.
- Outbound SDN: Callers cannot dial outbound SDNs. Outbound SDNs install automatically within the SDN Table. No corresponding CDN, phantom DN, or dummy queue may be programmed on the switch. Services, such as the following, use outbound SDNs:
    - Outcalling Services (Remote Notification, Delivery to Telephone, and Delivery to Fax)
    - Networking Services (AMIS and Enterprise)

You cannot add or delete an outbound SDN from the SDN table.

Accessing the SDN Table

Open the SDN Table by clicking System in the CallPilot Manager menu bar. Then, click Service Directory Number to access the SDN Table browser page.

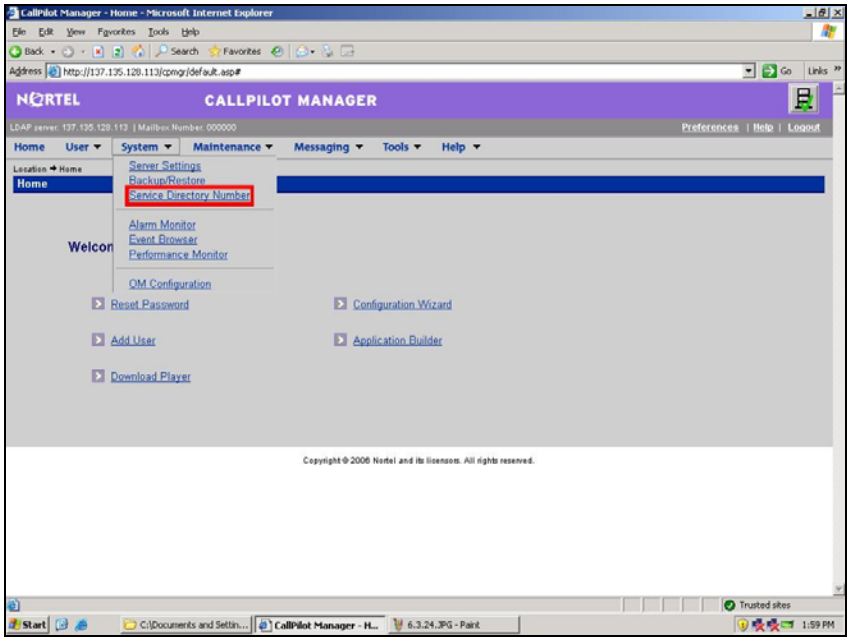
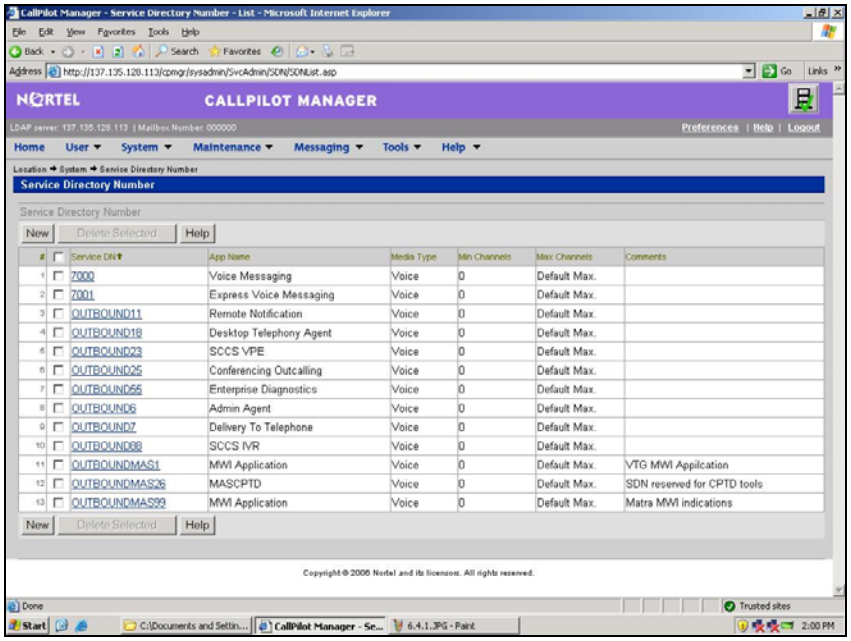


Figure 6.4.1: SDN Table Browser Page

Examples of the inbound and outbound entries listed in the SDN Table browser page are listed below:



#	Service DN	App Name	Media Type	Min Channels	Max Channels	Comments
1	7000	Voice Messaging	Voice	0	Default Max.	
2	7001	Express Voice Messaging	Voice	0	Default Max.	
3	OUTBOUND11	Remote Notification	Voice	0	Default Max.	
4	OUTBOUND18	Desktop Telephony Agent	Voice	0	Default Max.	
5	OUTBOUND23	SCCS VPE	Voice	0	Default Max.	
6	OUTBOUND25	Conferencing Outcalling	Voice	0	Default Max.	
7	OUTBOUND55	Enterprise Diagnostics	Voice	0	Default Max.	
8	OUTBOUND6	Admin Agent	Voice	0	Default Max.	
9	OUTBOUND7	Delivery To Telephone	Voice	0	Default Max.	
10	OUTBOUND88	SCCS IVR	Voice	0	Default Max.	
11	OUTBOUNDMAS1	MWI Application	Voice	0	Default Max.	VTG MWI Appilcation
12	OUTBOUNDMAS26	MASCPTD	Voice	0	Default Max.	SDN reserved for CPTD tools
13	OUTBOUNDMAS99	MWI Application	Voice	0	Default Max.	Matra MWI indications

Figure 6.4.2: SDN Table Browser Page, Showing Inbound and Outbound Entries

Lesson Content: Service Directory Number (SDN) continued

SDN Browser Page

The SDN browser page contains the following items:

- The New button provides direct access to a blank SDN Detail page where you can define a new SDN.
- A Refresh List button lets you see the most currently listing of entries I the SDN table
- The Help button provides direct access to online information and procedures related to SDNs
- A table lists the Service DNs associated Application (or service) names, Media Types (voice, fax, or speech recognition, minimum channels, and comments). To link directly to the SDN Details page for an existing SDN, click the service DN listed in the SDN Table.
- A check mark in the box to the left of the service DN listing lets you use the Delete Selected button. (Remember, however, that you cannot delete an outbound DN).

SDN Detail Page

Use the SDN Detail page to add new entries or make modifications to existing entries.

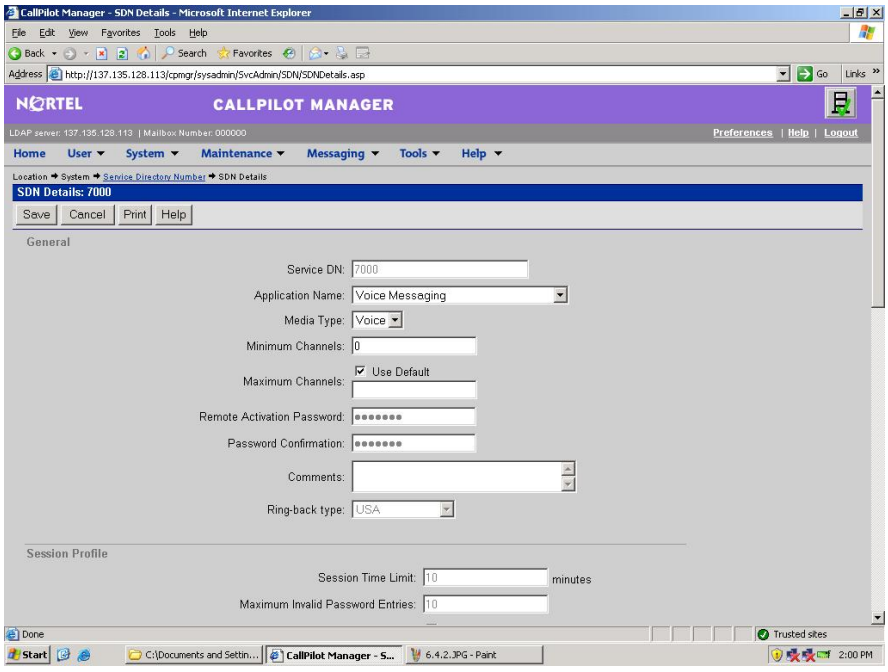


Figure 6.4.3: SDN Detail Page

Lesson Content: Service Directory Number (SDN) continued

SDN Detail page, contd.

Examples of the entries listed in the SDN Detail page are listed below:

Field	Definition
Service DN	Use this field to type the dialable DN you want to assign to the service or front-end voice menu.
Application Name	The drop-down box lists the features or voice menus available for your selection.
Media Type	Select the media type that is appropriate for the service or application for your SDN. Options include voice, fax, and speech recognition.
Minimum Channels	You can specify a minimum channel value for each SDN in the SDN Table. Use the Minimum setting to guarantee a minimum number of channels available to an SDN at any given time.
NOTE: The following is a list of rules for Minimum channel values: The sum of all minimum values in the SDN table cannot exceed the number of configured channels. A setting of 0 (default) implies that no channels are guaranteed. Setting a minimum for an SDN increases the guaranteed service for that SDN, but reduces the aggregate guaranteed service of other SDNs, because fewer channels are available to them.	
Use Default Maximum	A check mark in the Use Default Maximum checkbox means that you are allowing CallPilot to allocate channels based on available resources.
Maximum Channels	You can set a Maximum channel value for an SDN. The Maximum setting is used to limit the number of channels that the SDN can use at any given time. The system queues calls when the maximum limit is reached or when no channels are available.
NOTE: The following is a list of rules for Maximum channel values: The maximum value cannot exceed the number of configured channels. A setting of 0 implies that no channels are available for the SDN, effectively disabling the SDN. Ringback is the only treatment given. A low maximum setting for an SDN reduces the guaranteed service for that SDN, but increases the aggregate guaranteed service for other SDNs.	

Session Profile

You must configure a session profile for Express Voice Messaging, Express Fax Messaging, Alternative User Interface (if applicable), and applications created with Application Builder.

Lesson Content: Service Directory Number (SDN) continued

Define the VIM Service in the SDN Table

Before you can remotely modify voice items that are to be used in your applications, you first need to create a Voice Item Maintenance (VIM) service that you can use to call in and update voice items.

Create a VIM service by assigning a Service DN and placing it in the SDN Table.

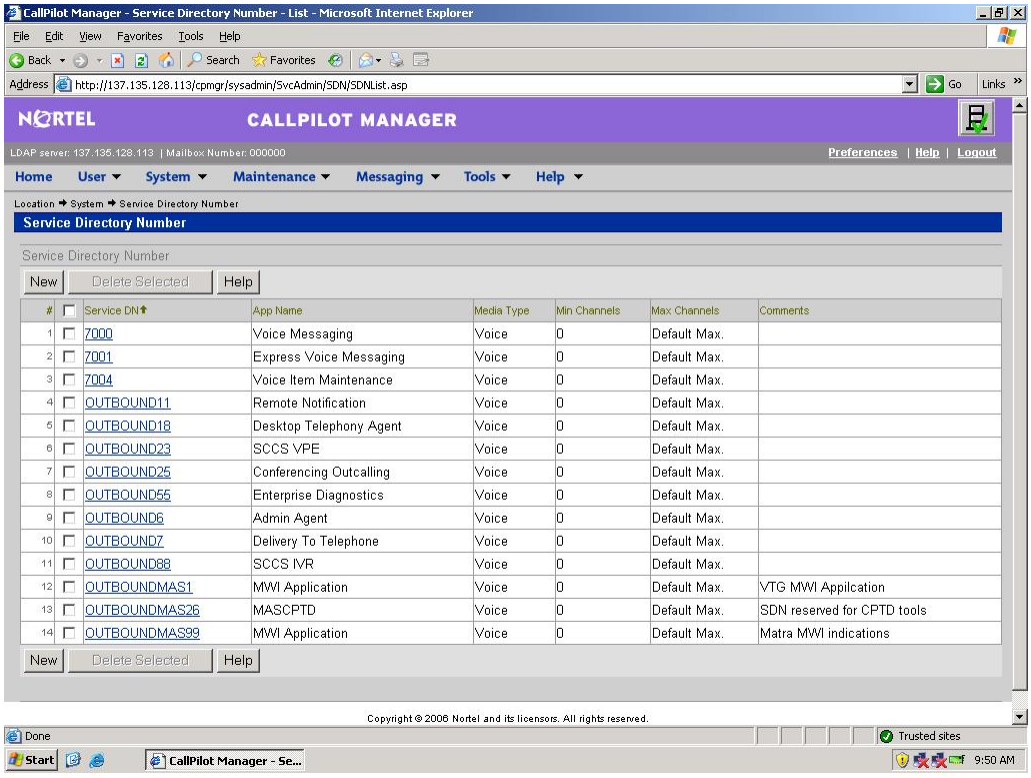


Figure 6.4.4: Service Directory Number Table

Note: You will be programming SDN's later in this course to support an Auto Attendant.

Summary

Lesson Summary

In this lesson, you were introduced to the System menu options. Upon completion of this student guide and after the lesson presentation and practice exercise, you should be able to:

7.11 PERFORM a voicemail database backup with 100% accuracy..

- **7.11.1 REVIEW** manufacturer's documentation
- **7.11.2 COMPLETE** unit documentation

7.12 PERFORM a voicemail database restore with 100% accuracy as evidenced by a positive function check..

- **7.12.1 REVIEW** manufacturer's documentation
- **7.12.2 PERFORM** function check
- **7.12.3 COMPLETE** unit documentation

7.13 PROGRAM a Service Directory Number (SDN) with 100% accuracy as evidenced by a positive function check.

- **7.13.1 REVIEW** manufacturer's documentation
- **7.13.2 DETERMINE** customer configuration
- **7.13.3 PERFORM** function check
- **7.13.4 COMPLETE** unit documentation

Lesson 5

MAINTAINENANCE MENU

Overview

Overview

In this lesson you are introduced to the CallPilot Manager's Maintenance Menu. You perform the following tasks:

- Modifying applications using the Maintenance Admin menu
- Monitor the channels

This lesson provides you with the tasks to use the Maintenance menu of the CallPilot System. This lesson discusses how to maintain CallPilot applications and completes with a discussion and demonstration on how to configure channel port information. A performance evaluation at the end of this lesson tests comprehension of the key performance elements that you need to perform for upcoming tasks.

Performance Objectives

Upon successful completion of this lesson, you will be able to:

7.3 **ESTABLISH** CallPilot Server network connectivity using CallPilot Manager and CallPilot Configuration Wizard with 100% accuracy as evidenced by a positive function check.

7.3.1 **REVIEW** manufacturer's documentation

7.3.2 **DETERMINE** customer configuration

7.3.3 **PERFORM** function check

7.3.4 **COMPLETE** unit documentation

Overview, continued

Performance Evaluations

The performance evaluations for these tasks are scheduled immediately following this lesson. These performance evaluations will be in delivered via a work order. These work orders will test the performance objective you have just completed in this lesson. These work orders build in complexity based on previous tasks from previous lessons. These performance evaluations are in a separate workbook from this Student Guide. Your instructor will hand these workbooks out in class. Please do not complete these work orders prior to the instructor assigning them to you. You will work in your booth with your partner as a class. Your instructor will sign off these performance evaluations as you complete each task.

References

The information in this lesson can be found in the following reference:

- CallPilot Administrator's Guide— NN44200-601_01.21

Tools and Equipment

The tools and equipment used for this lesson are:

- CallPilot Server
- Call Server

Job Aids

There are no job aids for this lesson.

Handouts

There are no handouts for this lesson.

Key Terms

There are no key terms for this lesson.

Pre-Lesson Work

There is no pre-lesson work for this lesson.

Lesson Content: CallPilot Manager > Maintenance Menu

Maintenance Menu

The CallPilot Maintenance Menu options are displayed below.

CallPilot Manager Menu					
User Menu	**System Menu**	**Maintenance Menu**	**Messaging Menu**	**Tools Menu**	**Help Menu**
User Search	Server Settings	Maintenance Admin	Messaging Delivery Confirmation	Configuration Wizard	CallPilot Administration Help
Saved User Searches	Backup and Restore	Multimedia Monitor	Message Network Configuration	My CallPilot Configuration	About CallPilot Manager
Add User	Service Directory Number	Channel Monitor	Network Diagnostics	Download Player	
Auto Add	Alarm Monitors		Internet Mail Clients		
Auto Delete	Event Browser		External Email Servers		
Mailbox Classes	Performance Monitor		Messaging Management		
Shared Distribution Lists	OM Configuration		Dialing Information		
User Creation Templates			Holidays		
			Outcalling Administration		
			Restriction Permission List		
			Notification Device Classes		
			System Prompt Customization		
			Security Administration		

Lesson Content: Maintenance Menu, continued

Maintenance Admin

The CallPilot Manager Maintenance Admin page identifies the server platform and switch type. It displays a system tree that, when expanded, lists the hardware components down the left side of the page.

Use the Maintenance Admin page in CallPilot Manager to perform the following maintenance tasks:

- Obtain general information about components.
- View component states.
- Start and stop components.
- Run integrated diagnostic tests.
- View the results of the last diagnostic test run against a component.

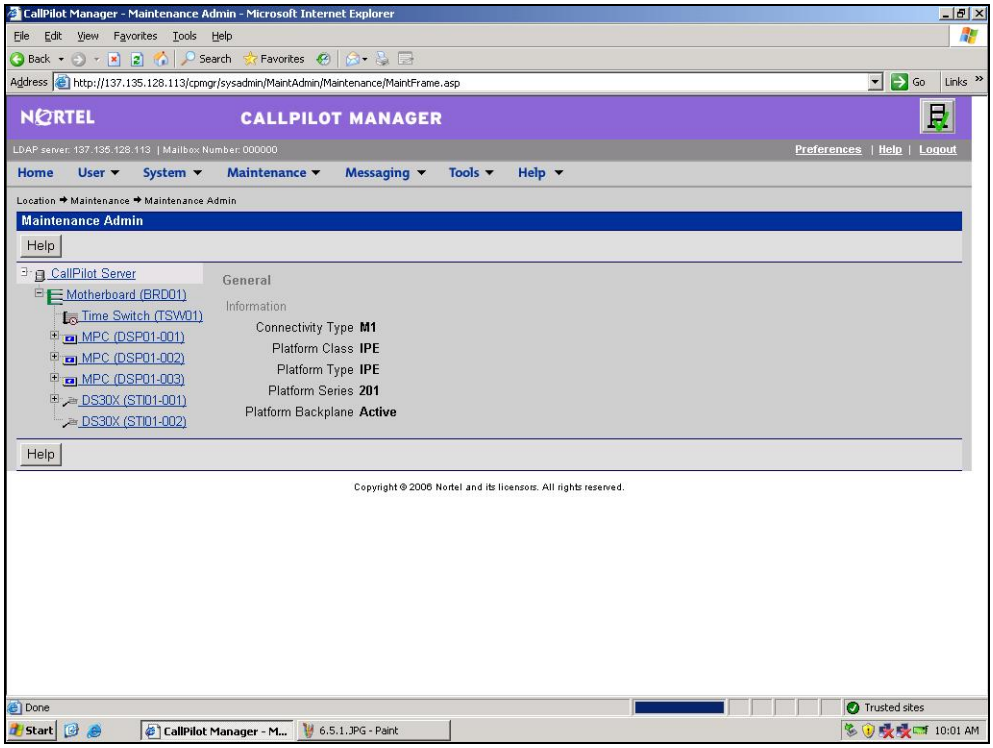


Figure 6.5.1: Maintenance Admin page

Lesson Content: Maintenance Menu, continued

Multimedia Monitor

If your CallPilot Server is unable to process incoming calls, you can view the status of voice, fax, and speech recognition channels with the Multimedia Monitor. The Multimedia Monitor provides the ability to:

- Monitor the current activity of functioning call channels and identify call channels that are not functioning.
- Identify a call channel's physical location.
- Identify the media type associated with a channel (voice, fax or speech recognition) and review the allocation of multimedia resources.

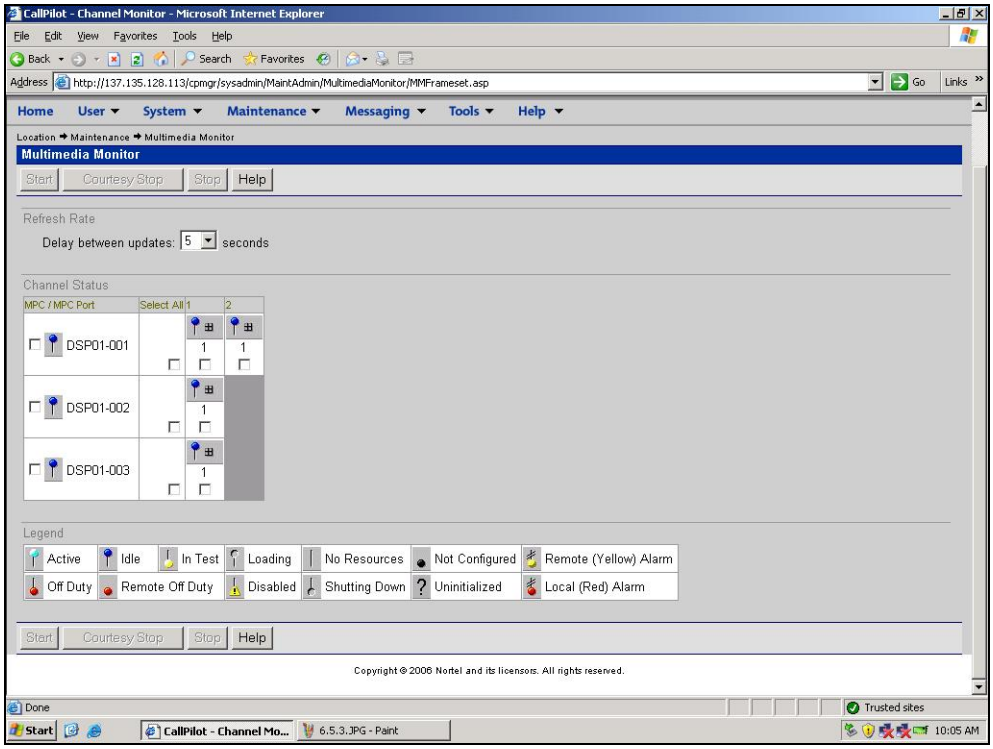


Figure 6.5.2: Multimedia Monitor Page

Lesson Content: Maintenance Menu, continued

Channel Monitor

View the state of call channels with Channel Monitor. If your CallPilot server has trouble processing incoming calls, you can use Cannel Monitor to:

- Monitor the current activity of functioning call channels and identify which call channels are not functioning, and selectively place them in or out of service.

- Identify a call channel's physical location by the position of its icon on the Channel Monitor page.

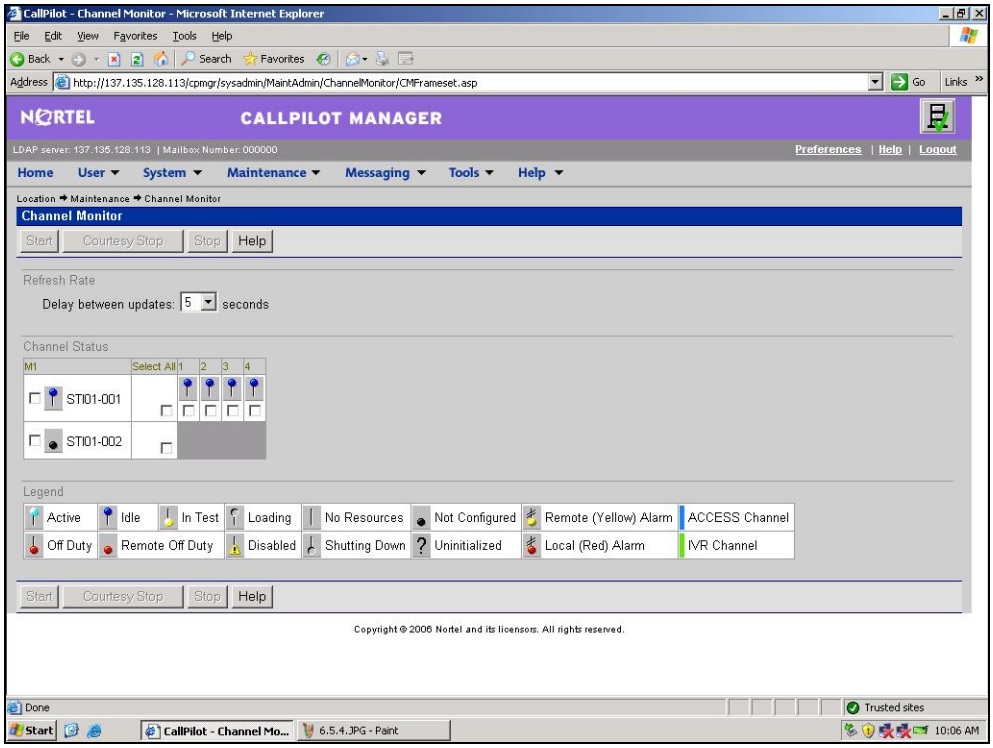


Figure 6.5.3: Channel Monitor Page

Summary

Lesson Summary

In this lesson, you were introduced to modifying an application. Upon completion of this student guide and after the lesson presentation and practice exercise, you should be able to:

7.3 **ESTABLISH** CallPilot Server network connectivity using CallPilot Manager and CallPilot Configuration Wizard with 100% accuracy as evidenced by a positive function check.

- **7.3.1** **REVIEW** manufacturer's documentation
- **7.3.2** **DETERMINE** customer configuration
- **7.3.3** **PERFORM** function check
- **7.3.4** **COMPLETE** unit documentation

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Lesson 6

MESSAGING MENU

Overview

Overview

In this lesson you are introduced to the Messaging Menu accessed from the CallPilot Manager Menu. You perform the following tasks:

- Set up message delivery confirmation
- Configure message networking
- Configure message delivery rules through message management
- Configure outcalling
- Configure holidays
- Set up system greetings and prompts
- Set up restriction permission lists (RPLs)
- Set up security administration

You start this lesson by configuring the message delivery rules for users. Next, you configure the system greeting and prompts. Finally, you learn how to configure outcalling, also known as Remote Notification. A performance activity at the end of this lesson tests comprehension of the key performance elements that you'll need to perform for upcoming tasks.

Performance Objectives

In this lesson, you will learn how to:

7.9 **PROGRAM** remote notification using CallPilot Manager with 100% accuracy as evidenced by a positive function check.

- **7.9.1** **REVIEW** manufacturer's documentation
- **7.9.2** **DETERMINE** customer configuration
- **7.9.3** **PERFORM** function check
- **7.9.4** **COMPLETE** unit documentation

7.10 **PROGRAM** an Auto Attendant with 100% accuracy as evidenced by a positive function check.

- **7.10.1** **REVIEW** manufacturer's documentation
- **7.10.2** **DETERMINE** customer configuration
- **7.10.3** **PERFORM** function check
- **7.10.4** **COMPLETE** unit documentation

Overview, continued

Performance Evaluations

The performance evaluations for these tasks are scheduled immediately following this lesson. These performance evaluations will be in delivered via a work order. These work orders will test the performance objectives you have just completed in this lesson. These work orders build in complexity based on previous tasks from previous lessons. These performance evaluations are in a separate workbook from this Student Guide. Your instructor will hand these workbooks out in class. Please do not complete these work orders prior to the instructor assigning them to you. You will work in your booth with your partner as a class. Your instructor will sign off these performance evaluations as you complete each task.

References

The information in this lesson can be found in the reference:

- CallPilot Administrator's Guide— NN44200-601_01.21

Tools and Equipment

The tools and equipment used for this lesson are:

- CallPilot Server
- Call Server

Job Aids

The job aids for this lesson are:

- How to Listen to a System or Custom Prompt
- How to Edit a Prompt
- How to Setup Greetings

Handouts

There are no handouts for this lesson.

Key Terms

Review the following key terms before you begin the reading assignment.

Terms	Definitions
Customized Call Answering Greeting	The call answering greeting is an optional greeting. It consists of the spoken name of an organization.
Prompt	A prompt is an audible or visible signal to a user that some process is complete or some user action is required.

Pre-Lesson Work

There is no pre-lesson work for this lesson.

Lesson Content: Messaging Menu

CallPilot Manager Menu					
User Menu	**System Menu**	**Maintenance Menu**	**Messaging Menu**	**Tools Menu**	**Help Menu**
User Search	Server Settings	Maintenance Admin	Messaging Delivery Confirmation	Configuration Wizard	CallPilot Administration Help
Saved User Searches	Backup and Restore	Multimedia Monitor	Message Network Configuration	My CallPilot Configuration	About CallPilot Manager
Add User	Service Directory Number	Channel Monitor	Network Diagnostics	Download Player	
Auto Add	Alarm Monitors		Internet Mail Clients		
Auto Delete	Event Browser		External Email Servers		
Mailbox Classes	Performance Monitor		Messaging Management		
Shared Distribution Lists	OM Configuration		Dialing Information		
User Creation Templates			Holidays		
			Outcalling Administration		
			Restriction Permission List		
			Notification Device Classes		
			System Prompt Customization		
			Security Administration		

Lesson Content: Messaging Management

About Messaging

The functionality contained within the Messaging pages specifies the message delivery rules for the entire CallPilot System.

All of the pages in Messaging can be changed and saved. Likewise, any changes can be canceled by selecting the Cancel button. The administrator can also print all of the settings by selecting the Print button. Help information is available from Messaging in the CallPilot Manager online Help Index.

Use Messaging Management to configure messaging parameters, such as change default messaging limits and warnings, configure CallPilot messaging service, implement DTT and DTF settings, and set up features that use the Thru-Dial feature.

Accessing Messaging Management

Messaging Management is accessed from the CallPilot Manager home page banner. Click Messaging>Messaging Management.

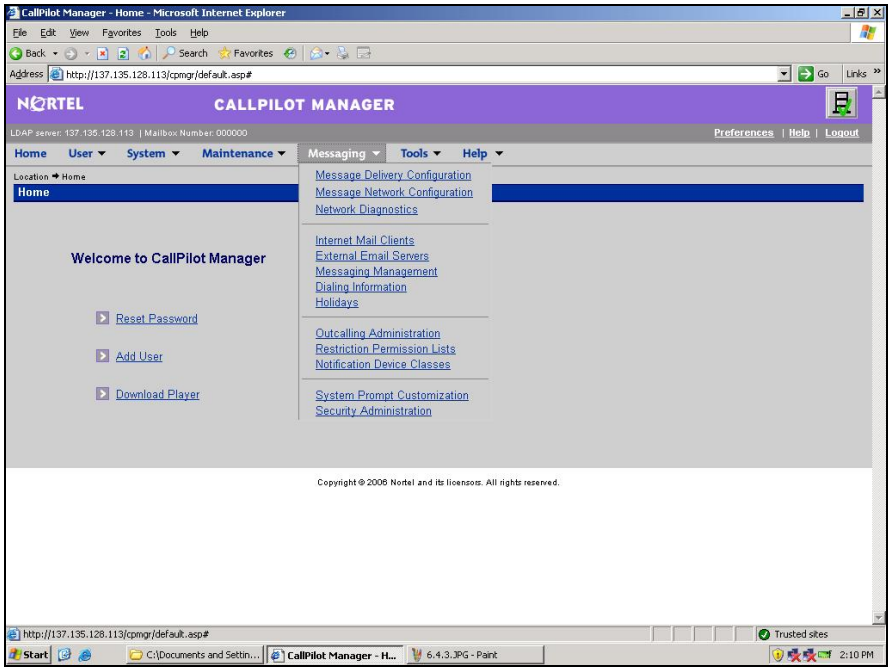

Figure 6.6.1: Messaging Management Browser page

Lesson Content: Messaging Management, continued

Configuring Messaging Management

The five sections on the Messaging Management page include:

- General,
- Timeouts,
- Broadcast Information,
- Special Purpose Mailboxes, and
- System Greetings

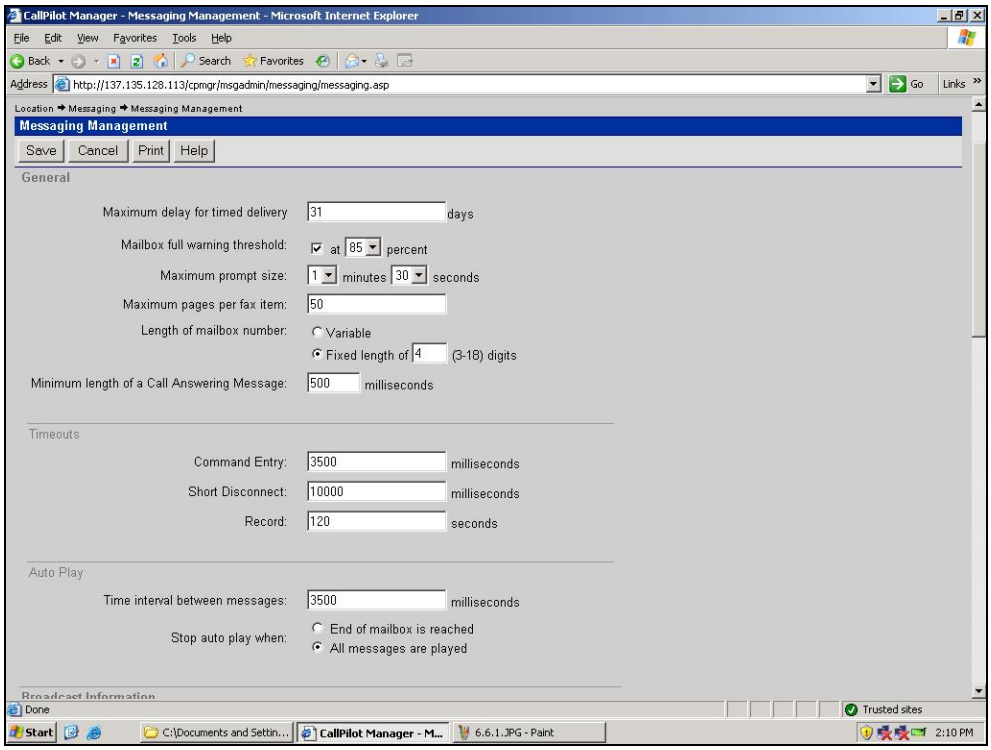

Figure 6.6.2: Messaging Management page

Lesson Content: Messaging Management, continued

General

An explanation of the General section of the Messaging Management page:

Fields	Description
Maximum delay for timed delivery	This field displays the maximum number of days that a message can be delayed before being delivered. The user can tag the message for timed delivery and specify when the message is to be delivered, as long as it falls within the limit set by this field. The valid range is from 0 to 365 days. The default is 31. To disallow users from tagging their messages for later delivery, the field must be set to zero.
Mailbox full warning threshold	These fields allow the administrator first enable or disable the full warning threshold, and then set the threshold value. This value determines how full a user's mailbox must become before the system plays the mailbox full prompt when the user logs on. The valid range is 1 to 99 percent, and the default is 85.
Maximum prompt size	This parameter determines the maximum allowed recording length for all voice items in CallPilot and Application Builder that affect announcements, Thru-Dial greetings, and menu recordings. The default value is 30 seconds. The administrator can specify a value between 00:30 and 09:59.
Maximum pages per fax item	This field sets the number of pages that a user can enter for any single fax item. The default is 50, and the range 1 to 99.
Length of mailbox number	The settings show the amount of digits that your customer wants to use for the mailbox numbers on your system.
Minimum length of a Call Answering Message	In this field, type the number of milliseconds that must be recorded for a call-answering message to be saved as such. The default is 500 milliseconds.

Lesson Content: Messaging Management, continued

Timeouts

The fields on the Timeouts section of the Messaging Management page are described below.

Fields	Description
Command Entry	The administrator can set the length of time, in milliseconds that the system waits for the caller to enter an anticipated response, such as entering an extension number or selecting from a voice menu. If the caller does nothing in the time specified, the system responds with a delayed prompt after the specified command entry timeout. The default is 3500 milliseconds; the range is 1000 to 5000 milliseconds.
Short Disconnect	This field determines when the system disconnects from a Thru-Dial service or voice menu because the caller has not determined an extension number or made a voice menu selection. The default is 10000 milliseconds; the valid range is from 10000 to 30000 milliseconds.
Record	The seconds entered set the maximum amount of silence permitted in a recording before the system disconnects. The default is 120 seconds; the range is 6 to 300 seconds.

About Timeouts

Use Timeout values to determine how long the system waits before taking action under the following circumstances:

- A caller does not provide an initial response: After a caller connects to a service in the Service Directory Number (SDN) table, the caller does not provide any keypad input. The system takes action x milliseconds after the greeting plays (where x represents the number of milliseconds specified in the command entry field). The administrator can specify what action the system must take for menus.

  Initial no response typically means that the caller does not have a touch-tone phone and cannot provide DTMF input.

About Timeouts, contd.

- A caller delays in responding: A caller provided some sort of DTMF input at some point, but is now delaying further input. When a caller presses a key, this puts the system into delayed response mode. For example, a caller connects to an Application Builder menu that is password protected (the caller enters the password). After the menu greeting prompt plays, the caller does not respond within a certain amount of time. Consider the lack of action as a delayed response.
- Command Entry Timeout: CallPilot uses Command Entry timeout in the following situations: In an announcement that is accessed directly, the system waits the set amount of time after playing the announcement, plays the announcement a second time, and then disconnects the call. The system does not use this timeout when an announcement is accessed from an Application Builder menu. In this case, the announcement plays once, and then the system returns the caller to the menu and follows what you have defined as the delayed response. Typically, you do not expect callers to provide input in an announcement. The system uses this timeout to put a limit on how long a caller can remain connected if the caller does nothing after the announcement plays.

  In an Application Builder menu, the system uses a Command Entry timeout for initial no response and delayed response. The system uses the Short Disconnect timeout value before a disconnect from a multimedia menu.

  - In a Thru-Dial service, the system uses a Command Entry timeout if the system is waiting for an initial response (such as an extension number or name after the Thru-Dial greeting plays) and the caller provides keypad input at some point (thus, the system recognizes that the caller is using touch-tone phone) but now delays further input. If the caller provides no keypad input and the system times out, the system transfers the caller to the revert DN defined for the Thru-Dial service. If the caller has provided keypad input, the system plays a series of prompts to help the caller. If the caller remains on the line without providing further input, the system transfers the caller to the revert DN or disconnects the call.
  - It is worth noting by any administrators that if you use Application Builder menus to accept AMIS networking calls, you must set this time to the maximum of five seconds. If you set this field to less than five seconds, the system can prematurely disconnect an AMIS call. In addition, the initial no response action defined in the menu definition must be set to something other than the revert DN set as the default. Instead, set the prompt to repeat menu choices. Otherwise, the system can prematurely disconnect an AMIS call that connects to a voice menu. If the menu is password protected, then the voice menu never reaches the Initial No Response action. In this case, the system uses the timeout value that applies before the call is disconnected as the Short Disconnect timeout.

Lesson Content: Messaging Management, continued

Short Disconnect

The system uses a Short Disconnect timeout in the following situations: In a Thru-Dial service, the system uses this timeout for disconnecting the Thru-Dial service. In an Application Builder menu, the system uses this timeout for disconnecting the menu.

In the case of an Application Builder menu, if the caller provides an initial response and then delays in providing further input, the system waits x seconds (the amount of time specified as the command entry timeout). The system takes the action defined for initial no response in the menu definition. After this action, the system waits another x seconds and if the caller does not respond, the system prompts the caller to press star for information. If the caller still does not respond (by pressing star or other key), the system waits x seconds (the amount of time specified as the short disconnect timeout value), plays the system goodbye prompt and then disconnects the call. The default is 10.0 seconds. The administrator can enter a value from 1.0 to 29.9 seconds.

Record Timeout

A Record timeout applies to the recording of prompts for menus, announcements, and Thru-Dial services. If during recording, you record x amount of silence (the amount of time specified as the record value), the system disconnects the session. For example, if an administrator is updating an announcement using the multimedia prompt maintenance service and records more than x minutes of silence (where x is the record timeout value), the system disconnects the call.

Broadcast Information

The fields that you administer in the Broadcast Information section of the Messaging Management are described below.

Fields	Description
Broadcast mailbox. Mailbox number	A broadcast message is a voice message that CallPilot delivers to all users in the system. To send a broadcast message, the administrator must specify a special mailbox number when composing the broadcast message from a mailbox with broadcast capability (specified in the user's mailbox class). The default mailbox number is 5555.
Broadcast mailbox, Mailbox personal verification	This field indicates whether or not you recorded a spoken name for the broadcast mailbox. If recorded, the system announces this verification when you compose a message to the broadcast mailbox. It confirms that you have entered the correct number.

Record Button

Record the verification through the phone set using the Record button or you can load a WAV using the Import button.

Field	Definition
Network Broadcast Number	If your system is networked, enter the DN that you use to make broadcast messages to network sites.

Special Purpose Mailbox

The fields that you administered in the Special Purpose Mailboxes section of Messaging Management page are shown below:

Field	Description
Fax General Delivery Mailbox	This field is a cross-reference to a fax-capable mailbox. CallPilot uses this mailbox for faxes sent to mailboxes without fax capability.
Networking Loopback Mailbox	Administrators use this field for testing new network configurations. The system enables this field only if Networking is installed. When someone sends a message addressed to this mailbox, the system responds by returning a message to the originator.
Alarm Mailbox Number	The system uses this number as a cross-reference to a mailbox that already exists on the system, usually a system administrator. In the event of alarms being triggered (by a critical, major, or minor event), the system deposits a system-generated message tagged Urgent in the administrator's mailbox.
Severity to Trigger	CallPilot enables the drop-down box if an Alarm Mailbox number is entered. It determines the minimum alarm severity level that will generate a message to the Alarm Mailbox. The system defaults to Critical. Possible choices follow: All Critical Major Minor

System Greetings

The fields that you administered in the System Greetings section of Messaging Management page are shown below:

Field	Description
Primary Language	This field provides a status of whether a system greeting has been recorded. The system greeting is a system-wide greeting that is played before any personal greeting. The greeting can also be recorded using the Record button. If a greeting is recorded, the system plays it for all external users on the system. The installer defines the primary language during system installation, and the administrator cannot change the language.
Secondary language greeting	If a secondary language greeting is recorded, it is played after the primary language greeting and before a user's personal greeting. This field shows if the recording has been made or lets the administrator record a greeting. The exact mechanism for recording a greeting is analogous to system prompt customization. The system supports both recording from a phone set or importing a WAV file.

Name Dialing

The fields that you administered in the Name Dialing section of Messaging Management page are shown below:

Field	Description
Name dialing and Name Addressing	This field lets the administrator disable the name dialing and name addressing features for external callers (it is not a requirement to be able to disable name dialing for internal callers). These features must be disabled in those countries where the telephone keypads do not map to an alphabetical sequence recognized by CallPilot. The field defaults to enabled (or checked).
Prefix for Name Dialing and Name Addressing	The system shadows out this field if the name dialing and name addressing field is not checked. This field defines the prefix that users must dial to use name dialing (during Thru-Dial) or name addressing (during message composition). When the system encounters this number, the data that the user enters via the telephone keypad is processed as a name instead of a number. The valid range is from 1 to 99. The default is 11. This number cannot conflict with Mailbox numbers, DNs, distribution list numbers, the DTT prefix, network location prefixes, or broadcast mailbox numbers.

Special DNs

The fields that you administered in the Special DNs section of Messaging Management page are shown below:

Field	Description
Billing DN	When CallPilot makes a fax delivery as a callback, the system reports the Service Directory Number that the caller (typically an external caller) called as the billing DN; however, if the Service Directory Number entry cannot be traced, the fax callback delivery can be charged against this catch all Billing DN. Each Service Directory Number that is billed can have its own billing plan, and if you wish to charge the caller that initiated the callback, the caller's CLID information must be available. The Billing DN can be up to 30 digits in length. The field is optional and can be left blank. The default is blank.
Revert DN	This field specifies the extension to which the system transfers a caller if 0 is pressed during a messaging session and the subscriber has not set up a revert DN. Setting this extension ensures that callers can usually transfer to a live attendant; however, the field can be left blank. The default is blank, and the maximum length input is 30 characters.

Dialing Information

The Dialing Information page contains dialing translation information needed for CallPilot to transform a number into a dialable directory number (DN). Typically, the system administrator uses the default dialing prefixes for callback applications, like Fax on Demand, AMIS Networking, or external Call Sender, to generate a dialable DN, depending on whether a call is local, national, international, or ESN (if applicable).
The fields that you administered in the Dialing Information section of Messaging Management page are shown below:

Field	Description
Local Prefix:	Edit box for entering the prefix that the system uses to dial out of the switch and access the private or public network to place a local call.
Long Distance Prefix:	Edit box for entering the prefix that the system uses to dial out of the switch and access the private or public network to place a long distance call.
International Prefix	Edit box for entering the prefix that the system uses to dial out of the switch and access the private or public network to place an international call.
ESN Access Code	Edit box for entering the prefix that the system uses to access the private ESN Network.

Public Telephone Network

The fields that you administered in the Public Telephone Network section of Messaging Management page are shown below:

Field	Description
Local County Code	Edit box for entering the country code of the switch that connects to CallPilot. The system uses the code to identify the location of the CallPilot within the public network.
Local area/city code	Edit box for entering the area or city code for the local system.

Lesson Content: System Prompts and Greetings

Overview

An administrator with the appropriate access level can customize selected system prompts.

The System Prompt Customization feature lets administrators alter a limited selection of CallPilot prompts on a per-system basis. You can access the functionality from Messaging>System Prompt Customization. The administrator has a choice between recording prompts through a telset or uploading a professionally recorded voice WAV file.

Customized Prompts for CallPilot	
ID Number	**Prompt Text**
1	CallPilot from Nortel Networks.
2	Goodbye
3	Express Messaging to mailbox?
4	You have dialed the Express Messaging Service. To leave a message, enter the mailbox number, followed by number-sign.
5	You have dialed the Express Messaging service. To leave a message, enter the mailbox number or the name.
6	Hello. You have a message from:
7	Hello

In the case of any customized system prompt, the standard system prompt is not deleted, and the application always supports the ability for customers to revert to the standard system prompt if they no longer wish to use the customized prompt.

After you have customized a system prompt, you can:

- Select either the supplied or the customized prompt
- Edit the customized prompt as often as necessary

System Prompts Confirmation

To customize system prompts, access Messaging > System Prompt Customization. The System Prompts Customization page appears.

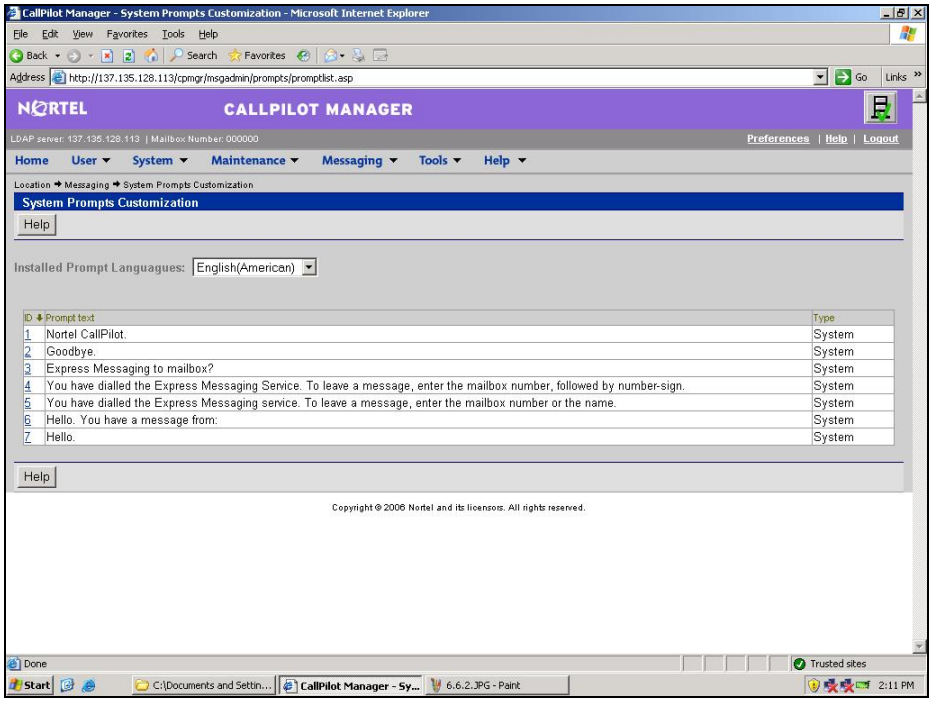

Figure 6.6.3: System Prompts Customization Page

The following fields are displayed on the Customized System Prompts page:

Field	Description
Installed Prompt Language	Select the language that your users will hear when prompted by the system
Prompt text	The Prompt text column displays the prompts that are currently in use by the server. For system prompts, the prompt text is displayed in its own language and cannot be changed by the user.
Type	The Type column displays the type of prompt that is currently in use by CallPilot: System or Customized. The administrator can browse through the list of prompts available for modification in every prompt language installed for that CallPilot system.

Listening to a System or Custom Prompt

Before you customize a prompt, listen to both the supplied system prompt and any customized prompt that was used to replace the supplied prompt.

NOTE: If your CallPilot is supported by a CS1000 switch, you must answer the telset within two or two-and-one-half ring cycles when using your telset to listen to a system prompt.

Before you can listen to a prompt, you must download the CallPilot Player.

Use the shortcut located on the CallPilot Manager home page to initiate the download. Follow the prompts to complete the installation.

How to Listen to a System or Custom Prompt	
Step	**Action**
1	In the Installed Prompt Languages list, select the language you want to view the supplied prompts in.
2	Click the prompt ID link for the prompt you want to hear.
3	Click the Play button.
End of procedure	

Edit a Prompt

Before you can edit a prompt, you must know the name and location of a suitable WAV file or have the CallPilot Play downloaded to your computer so you can record the prompts.

Follow the steps listed below to edit a prompt:

How to Edit a Prompt	
Step	**Action**
1	The System Prompts Customization page includes an Installed Prompt Languages drop-down box that displays the languages that are installed on the connected server. A maximum of six voice prompt languages can be installed on the server. Select the language for which you want to replace the system default prompt.
2	Click the Customized Prompt radio button.
3	In the associated box, type the description to appear in the list of prompts for the selected language.
4	Provide the customized prompt by specifying the prompt file that was already recorded.
5	Click the Import button and type or browse for the existing WAV file you want to use.
6	To record a new prompt, click the Telset button. A User prompt box appears.
7	Type the DN of a nearby telset and Click OK. The CallPilot player appears.
8	Record the prompt.
9	Click Save.
End of procedure	

Lesson Content: System Prompts and Greetings, continued

Customizing System Greetings

In addition to being able to record custom prompts through System Prompt Customization, you can let users record the organization call answering greeting and personal verifications or, as the administrator, you can choose to record them yourself.

For example, you can record a system greeting that precedes the personal greeting of all users during a call answering session, such as: "Welcome to ABC Company, Home Electronics Division. Hello, this is John Smith. I'm away from my desk at the moment. Please leave a message, and I'll return your call. Thank you for calling."

The first sentence is the system greeting. The remainder of the message is the user's personal greeting.

Setting up Greeting Capabilities in the Mailbox Class

The Call Answering section of the Mailbox Details page defines how greetings are handled. You can define an organizational call answering greeting as well as a personal verification for the mailbox.

You can configure, for all mailbox class members, the following call answering options related to greetings:

- Allow or disallow mailbox class members to record their own mailbox Personal Verifications by using telset commands.
- Allow or disallow mailbox class members to record organization call answering greetings.

Call Answering

To specify the greeting options, access User>Mailbox Classes and follow the steps listed below:

How to Set Up Greetings	
Step	**Action**
1	Click the appropriate mailbox class name and locate the Call Answering section.
2	In the Personal Verification selection box, select the appropriate option: Click Record from teleset to permit mailbox owners to record their own personal verifications. Callers can hear the mailbox owners' voices. Click Record for all users to let a mailbox owner assist CallPilot administrators in recording personal verifications for directory entries and mailboxes. Click Set by administrator to prevent mailbox owners from recording their own personal verifications.
3	The organization call answering greeting plays to external callers when they are connected to a user's mailbox through call answering. This greeting plays before any personal greetings and typically contains the spoken name of the organization. This greeting also plays when a remote notification call is answered.
4	In the Language for Callers list, choose the language (or languages) of voice prompts that callers hear when they leave a message in an owner's mailbox. The options include those listed below: System primary: Callers hear prompts in the default CallPilot language User's preferred: Callers hear prompts in the language selected by the mailbox owner System dual language: Callers hear prompts in both the primary and the secondary language configured for the CallPilot server
End of procedure	

User Details page

The User Details page includes the status of user greeting fields. These fields are described below:

Field	Definition
Personal Verification	This is a read-only field that displays whether the user has recorded a personal verification. From the Record button, the administrator can set the personal verification on behalf of the user. The administrator has the option of recording from the telset or importing a WAV file. If the administrator selects a record from the telset, he specifies a DN, and then records the personal verification. If the administrator wishes to import a WAV file, he browses the file manager and selects the appropriate file.
Internal Personal Greeting	A user can have three different greetings recorded: an internal, external, and temporary absence greeting. Each mailbox user can record his own greetings from the telset, but the administrator can see if greetings were recorded.
External Personal Greeting	This is a status indication for whether the greeting was recorded.
Temporary Absence Greeting	The temporary absence greeting overrides the internal and external greetings, and is used for a fixed period of time. This saves users from having to frequently update their internal and external greetings. This field works in exactly the same way as the internal and external personal greeting fields. The administrator can also record the temporary absence greeting on behalf of the mailbox user, which is particularly useful in situations where the mailbox user is indisposed.
Temporary Absence Greeting Expiry Date	This is a read-only field that displays whether the temporary absence greeting has an expiry date, and the expiry date and time of the temporary absence greeting. The field also displays whether the temporary absence greeting has expired. If the temporary absence greeting does not have an expiry date, the display shows no expiry.

Topic Review: System Prompts and Greetings

Directions

Select the appropriate answer.

Questions

1. Which item on the CallPilot Manager home page menu bar can you access to navigate to the System Prompt Customization page?

   A. User
   B. System
   C. Messaging
   D. Maintenance

2. What type of file can you import for pre-recorder customized prompts?

   A. TIF
   B. WAV
   C. CallPilot Player
   D. Nortel Printer Driver

3. Where can you look to find out if a user has recorder an External Personal Greeting?

   A. User Details page
   B. Mailbox Class Details page
   C. Messaging Management page
   D. System Prompts Customization page

Lesson Content: Setting up Outcalling

Overview

Remote Notification (RN) is the service that lets users be notified at a remote phone or pager when a new message arrives in their mailbox. For example, if you have technician's on-call, you want them to be notified when they receive an urgent message in their mailbox.

Outcalling services are not automatically enabled for all users on the system. The services have to be specifically enabled for each user that requires one or more of them. Because Outcalling features can place calls outside your switch and can incur toll charges, it is important to be aware of security issues and assign appropriate restriction/permission lists to these features.

In addition, when setting up Outcalling features, you must review the Service Directory Numbers (SDNs) and channel allocation. Remote Notification, Delivery to Telephone, and Delivery to Fax are outbound SDNs. This simplifies the programming needed to establish Service Directory Numbers and channel allocation for your Outcalling services, because outbound SDNs do not require switch-side programming.

The SDN table is where Outcalling channel allocation is set up. You can select the Outcalling services Remote Notification.

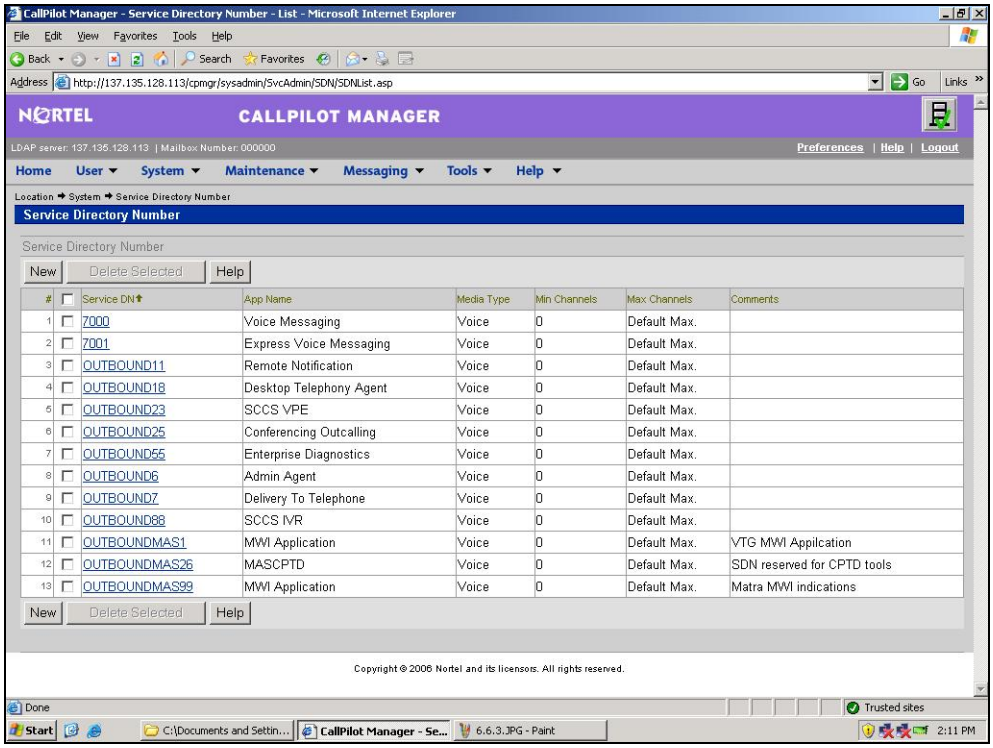

Figure 6.6.4: Service Directory Number page

Outbound Channels in SDN Table

The column headings you are concerned with when making adjustments to channel allocation in the SDN table include those listed below. Refer to the table below.

Field	Definition
Service DN	The Service Directory Number assigned to the application or service
Application name	A name that identifies the service.
Media type	The channel allocation for that service, whether it be a voice channel or fax channel.
Minimum channels	The minimum number of multimedia channels, which are reserved for this application.
Maximum channels	The maximum number of virtual channels that can be simultaneously used by this application.
Comments	The free text entry can be used to give more detail on an application.

NOTE: Number of channels refers to the number of virtual channels. Total number of minimum channels defined in the SDN table must be equal to or less than the total number of channels on the system.

You can change an entry in the SDN table by selecting the entry and double-clicking it. You can then adjust the minimum number of channels to be reserved and the maximum number of channels to be used for the application at any one time by selecting the appropriate field and keying the value you wish to assign. Optionally, you might wish to add some comments to provide more of a description for the application. When these changes are complete, click Save. Changes appear in the SDN table.

Practice Activity: Remote Notification

Directions Complete Work Order 31.

Lesson Content: Database Administration

Overview

CallPilot Manager contains the functionality required to set up, configure, and administer the system database. In this lesson, you learn how to use the components of the CallPilot Manager Interface that are designed for database setup.

Database Parameter Setup Checklist

While no officially recommended order exists for setting up the parameters of your database, the following checklist shows the task flow used in this lesson. Information is provided for each task, in the order shown, in the remainder of this lesson.

You can look up task procedures in CallPilot Manager online Help. Click the Help button, select Help Contents, click CallPilot Manager, and locate the procedures you need by either using the search capability or scrolling down the Index listing.

Database Parameters Setup Checklist	
Step	**Action**
1	Maintain restriction and permission lists.
2	Configure Security Administration.
3	Configure messaging capabilities for: • Message management • Dialing Information • Holidays
4	Set up mailbox classes, including administer classes.
5	Administer user-creation templates.
6	Create Service Directory Numbers.

Setting Up Restriction Permission

Restriction Permission Lists (RPLs) are an important part of preventing users and callers from abusing your CallPilot system.

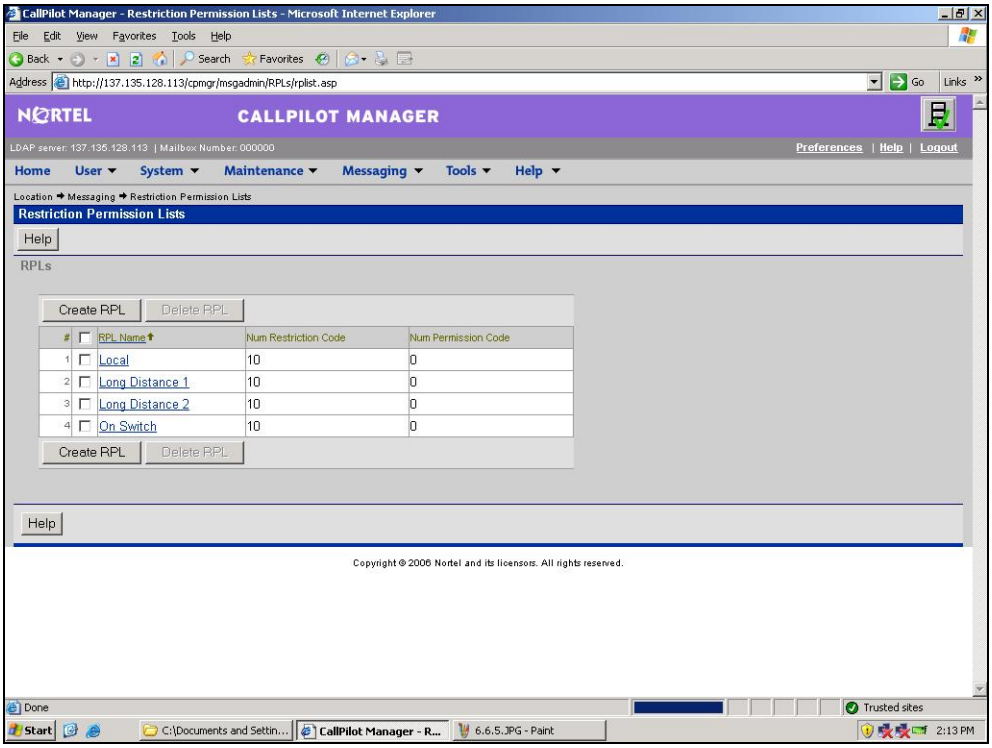

Figure 6.6.5: RPL Screen

Restriction Permission Lists (RPL)

CallPilot uses RPLs to provide security and prevent unauthorized toll charges for various services. A CallPilot system contains a maximum of 200 restriction permission lists. Within a user's mailbox class, the system administrator can select a different RPL (one of the 200 on the system) for the following features: external Call Sender, Delivery to Telephone, Delivery to Fax, Remote Notification, AMIS, mailbox Thru-Dial, automated attendant service, and other customer applications that include a Thru-Dial block, call answering, express voice messaging, name dialing and name addressing by external callers, and fax printing.

RPLs

RPLs are groups or sets of dialing codes. Each RPL can include up to 30 restriction codes and up to 30 permission codes. Any dialing code can be entered as a restriction or permission code. A dialing code can be an extension number (on the switch) or any telephone number prefix that is used for dialing out of the switch, such as 9 for local calls, 91 for long distance calls, 6 for ESN calls, and so on.

Restriction Codes

You typically use restriction codes for defining the rules of outdialing, and use permission codes for indicating the exceptions to the rule. For example, you can create an RPL that allows on-switch dialing with a numbering plan of 2s and 3s and local dialing, but not long-distance dialing except to two specific area codes that are allowed (514 and 504). An example follows for this type of restriction permission class:

- Restriction Codes: 1 4 5 6 7 8 91 90
- Permission Codes: 91514 91504

In this example, 2 and 3 are part of the numbering plan and must not appear in the Restriction Codes. Local calls are allowed because 9 by itself is not restricted, only 91 and 90 are restricted. You take this action because dialing codes that are a subset of a restriction code, but that are shorter than the restriction code, are not restricted; however, to allow outdialing for the long distance area codes 514 and 504, the administrator must enter 91514 and 91504 as permission codes, because these numbers are exceptions to the rule stating that numbers beginning with 91 are restricted.

The system contains four predefined lists: On Switch, Local, Long Distance 1, and Long Distance 2. These names can be changed. As an example, the administrator can use the On Switch class to allow dialing to extensions on the switch only, and restrict all local and long-distance calls. The administrator can then use Local to allow on-switch and local calls but restrict all long-distance calls. Long Distance 1 could be used to restrict all long-distance calls, and Long Distance 2 could be used to restrict all international calls, but allow long-distance dialing, as long as it is to the same country code. These are only suggestions. The administrator is responsible for developing a policy for restricting outdialing that is suitable for the organization's needs.

Required RPL Maintenance Tasks

Nortel Networks recommends that the system administrator perform certain maintenance tasks following a CallPilot installation:

- Customize the default RPLs:
  - On Switch
  - Local
  - Long Distance 1
  - Long Distance 2
- Define the global restrictions and permissions for off-switch dialing.
- Apply RPLs to Thru-Dial features used by mailbox class members.
- Apply a callback-handling RPL to any custom applications.

Accessing RPLs

Access the RPL by clicking Messaging in the CallPilot menu bar, and then clicking Restriction Permission Lists.

The Restriction Permission Lists page contains the following items:

- A Help button provides direct access to online information specifically related to Restriction Permission Lists
- A table lists the name of the RPLs on your system and their corresponding restriction code number and permission code numbers. A checkbox is located adjacent to the RPL name. When you click to place a check in the checkbox, the Delete RPL button is available for you to use if you need to delete an RPL.

RPL Detail—General Section

The RPL Details page provides the fields needed to configure a new RPL. The General fields administered in the RPL Details page follow:

Field	Description
List name	This field accepts any alphanumeric string of up to 25 characters. By default, the four pre-defined RPL names include On Switch, Local, Long Distance 1, and Long Distance 2. You can change these names.
Comments	This field accepts any alphanumeric string of up to 25 characters. Use the Comments field to provide more information to the administrator.
Last Modified	This read-only field displays the date and time of the last time the RPL was saved. The field is blank when a new RPL is being created.

Restriction Permission Codes

The Restriction Permission Codes fields administered in the RPL Details page follow:

Field	Description
Restriction	The system restricts any extension numbers or phone numbers that begin with any of the codes entered in this field by the administrator.
Permission	Permission codes are exceptions to the rules defined by the restriction codes. When the administrator defines the restriction permission list from the Restriction Permission Lists page, the administrator can apply a particular restriction permission class to each of the following: • The entire system (the global RPL) • A mailbox class (a mailbox class RPL) • An individual application or service (an application-specific RPL)

Settings for New System

The four pre-packaged restriction permission lists (On Switch, Local, Long Distance 1, and Long Distance 2) arrive at the customer site defined as follows:

- Restriction codes: 0123456789
- Permission codes: none

The Local RPL is assigned to all applicable features by default. This RPL restricts all calls through CallPilot (for example, Call Sender) on a new system. The administrator must modify the default restriction permission lists. Otherwise, features that outdial do not work, including call answering and express messaging Thru-Dial, extension dialing, and mailbox Thru-Dial, revert DN, Remote Notification, Delivery To Telephone, Delivery To Fax, call sender, AMIS networking, Application Builder applications, fax printing, DN, and others.

Global RPLs

During a call-answering session, an external caller can potentially use Thru-Dial capabilities to place unauthorized calls that are billed to the system. To use Thru-Dial from a call-answering session, a caller must press 0 followed by a dialable DN. If the caller waits more than two seconds after entering 0, he is connected to an attendant.

External callers and internal users can use Thru-Dial during express messaging. To prevent callers and users from abusing Thru-Dial capabilities during call-answering and express-messaging sessions, the administrator must make sure an appropriate restriction permission class is applied to call answering/express messaging in Security Administration. Choose one of the restriction permission lists defined in the RPL object manager.

Creating a Restriction Permission List

The administrator can create up to 200 separate restriction permission lists; however, for any feature (except Thru-Dial services) only one of the 200 lists that can be defined here can apply. Different ways exist to approach restriction permission lists.

All features are initially restricted. When CallPilot is installed, the installation team must fill in all restriction fields. Define the first restriction code as 0, the second as 1, and so on to the tenth code, which is defined as 9.

This means that all possible extensions and phone numbers are restricted, and none of the features to which the administrator can apply restriction permission codes can work.

If the administrator does not change the restriction permission lists to permit certain numbers, the following features cannot work:

- Revert DNs are inoperable.
- Users cannot dial any extensions.
- External call sender does not work.
- Users cannot send AMIS messages (they can receive messages).
- The system cannot remotely notify users of their messages.
- Users cannot send messages and faxes to non-users.
- Callers cannot thru-dial during call answering or express messaging sessions.
- Thru-Dial services cannot work.
- Fax Printing DNs cannot work.

Configure Security Administration

The CallPilot Administrator's Guide provides information and guidelines to help you establish security policies and procedures for personnel whose job responsibilities let them have access to your CallPilot system. Refer to the following chapters when you address these issues within your organization:

- CallPilot Security Recommendations
- Physically Securing Your Equipment and Data
- Configuring Mailbox Security

The security administration fields lets the administrator set up the level of security provided to users of CallPilot. For example, the administrator can set the maximum number of invalid logon attempts that are allowed before a user's mailbox is disabled, as well as several parameters related to users' passwords. Use the Security Administration page to administer Hacker Monitoring for CLIDs, mailboxes, SMTP/VPIM, and Application Builder applications.

How to Access Security Administration

From the CallPilot Manager menu bar, click Messaging>Security Administration.

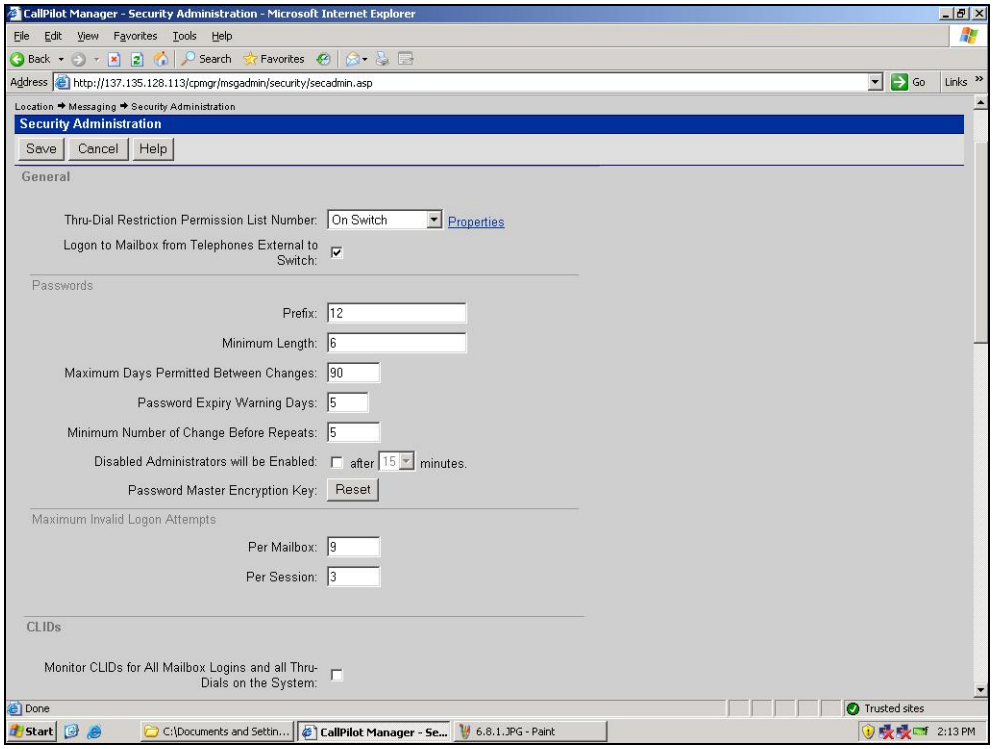

Figure 6.6.6: Security Administration page

General

The General fields administered in Security Administration are as follows:

Field	Description
Thru-Dial Restriction Permission List Number	This global Restriction Permission List governs call answering, express voice messaging, and mailbox Thru-Dial sessions for all mailbox owners on the system. Messaging features that use the Thru-Dial function include: • Call answering • Express voice messaging • Mailbox thru-dialing • Name dialing and name addressing by external callers • External Call Sender • Automated attendant service and other customer applications that include a Thru-Dial block • Delivery to Telephone and Delivery to Fax • AMIS Open networking • Remote Notification
Logon to Mailbox from Telephone External to Switch	External logon is enabled by default to let users access their mailboxes from phones that are external to the switch. The disabling of this feature allows maximum security. In the event of serious system hacking, you can disable the ability to externally log on.

Password Section

The Passwords fields administered in Security Administration follow:

Field	Description
Prefix	When you create a new mailbox, the user must use a default password to initially dial the mailbox. The default setting is 12.
Minimum Length	A mailbox password can be between 4 and 16 digits in length. The default setting is 6.
Maximum Days Permitted Between Changes	This field is a system-wide setting that determines the maximum number of days a user can keep the same password. The default value is 90 days; the range is 0 to 365 days.
Password Expiry Warning Days	This field determines how many days before the CallPilot notifies the user of the password's impending expiration. The default setting is 5 days; the valid range is between 1 to 60 days.
Minimum Number of Changes Before Repeats	The field specifies the number of passwords that have to be used before they can be repeated. The valid range is 1 to 5, and the default is 5.
Disabled Administrators Will Be Enabled After X Minutes	Administrators can be locked out of CallPilot Manager if they (or someone else) try to log on with a wrong password too many times. You can enter up to 60 minutes. The default is 15 minutes.

Maximum Invalid Logon Attempts

This section controls external logon attempts and limits the number of unsuccessful logon attempts for all system users.

The Maximum Invalid Logon Attempts fields administered in Security Administration follow:

Field	Definition
Per Mailbox	When the designated number of invalid mailbox logon attempts is made, CallPilot locks the user out of the mailbox. The mailbox remains disabled until an administrator re-enables it. The range of values is from 1 to 99; the default value is 9. After the user successfully logs in, the invalid logon attempt counter resets to zero.
Per Session	When a user reaches this value of unsuccessful logon attempts within the same session, CallPilot drops the session. This setting provides another means of increasing security on the system. The range is 1 to 99. The default value is three.

CLIDS

This is part of the Hacker Monitor feature, which lets the administrator track specific CLIDS (calling line identification numbers) and monitor specific periods of the day.

Field	Definition
Monitor CLIDS for All Mailbox Logins and all Thru-Dials on the System	If this feature is enabled, any thru-dials result in the system sending an announcement to the alarm mailbox via remote notification, indicating to the administrator that a Thru-Dial system alarm or event was generated. The administrator can access the system alarms and events to view the details of the Thru-Dial call.
Monitor Period	Use the From and To checkboxes to set the time periods for this monitoring.
Internal	If you suspect a user of using features in an unauthorized way, you can monitor their activities. The administrator can define the CLIDs that must be monitored by typing a DN in the text entry box and adding it to the list box This list comprises all the numbers that must be monitored. You must define separate lists for internal and external numbers. You can monitor a maximum of 20 internal CLIDs. A total of 30 digits can be used.
External	If you suspect hackers are accessing your system from the outside, type the external CLIDS that you need to monitor, and click the corresponding Add button. You can monitor a maximum of 20 external CLIDs. A total of 30 digits can be used.

Summary

Lesson Summary

In this lesson, you learned about CallPilot message management. Upon completion of this student guide and after the lesson presentation and practice exercise, you should be able to:

7.9 **PROGRAM** remote notification using CallPilot Manager with 100% accuracy as evidenced by a positive function check.

- **7.9.1** **REVIEW** manufacturer's documentation
- **7.9.2** **DETERMINE** customer configuration
- **7.9.3** **PERFORM** function check
- **7.9.4** **COMPLETE** unit documentation

7.14 **PROGRAM** an Auto Attendant with 100% accuracy as evidenced by a positive function check.

- **7.14.1** **REVIEW** manufacturer's documentation
- **7.14.2** **DETERMINE** customer configuration
- **7.14.3** **PERFORM** function check
- **7.14.4** **COMPLETE** unit documentation

Lesson 7

TOOLS MENU

Overview

Overview

In this lesson you will be introduced to the Tools Menu accessed from the CallPilot Manager Menu. This is where you will perform the following tasks:

- Download the player
- Configure Application Builder
- Set up an application using Application Builder Blocks

This lesson provides you with the key performance elements to use the Tools menu of the CallPilot System. You start this lesson by planning the service. In order to plan a service, you need to consider a few factors. For example, who will be calling this application? Next, you will need to ensure that you can support this application. For example, are there enough channels to support this application? Next, you will learn about guidelines for creating applications. For example, how to identify the name of the application?

This lesson then moves into Application Builder blocks. You will be introduced to the concept of blocks and the basic types of blocks that are used to create applications. The lesson concludes with a detailed discussion on block types, along with their associated parameters.

Numerous performance activities throughout this lesson test comprehension of the key performance elements that you'll need to perform for upcoming tasks.

Performance Objectives

Upon successful completion of this lesson, you will be able to:

7.14 PROGRAM an Auto Attendant with 100% accuracy as evidenced by a positive function check.

7.14.1 REVIEW manufacturer's documentation

7.14.2 DETERMINE customer configuration

7.14.3 PERFORM function check

7.14.4 COMPLETE unit documentation

Overview, continued

Performance Evaluations

The performance evaluations for these tasks are scheduled immediately following this lesson. These performance evaluations will be in delivered via a work order. These work orders will test the performance objectives you have just completed in this lesson. These work orders build in complexity based on previous tasks from previous lessons. These performance evaluations are in a separate workbook from this Student Guide. Your instructor will hand these workbooks out in class. Please do not complete these work orders prior to the instructor assigning them to you. You will work in your booth with your partner as a class. Your instructor will sign off these performance evaluations as you complete each task.

References

The information in this lesson can be found in the following reference:

- CallPilot Administrator's Guide—NN44200-601_01.21

Tools and Equipment

The tools and equipment used for this lesson are:

- CallPilot Server
- Call Server

Job Aids

The job aids for this lesson are:

- What to Consider
- Tool Bars Icons

Overview, continued

Handouts

There are no handouts for this lesson.

Key Terms

Review the following key terms before you begin the reading assignment.

Terms	Definitions
Application	An application is a defined set of parameters that contain voice items and fax items that provide a functionality that callers can access by dialing the application telephone number.
Application Builder	Application Builder is the CallPilot environment for the creation and administration of voice menus, announcements, Thru-Dial services, and time-of-day services.
Application File	An application is a defined set of parameters that contain voice items and fax items that provide a functionality that callers can access by dialing the application telephone number.
Application Window	This is the window that appears when an application file is opened.
Block	Application Builder blocks are the components of an application, which, when linked together, represent a call flow. Each block can be configured according to the specific needs of the application.
Call Flow	Blocks that are linked together to show the path that a caller will take through an application. The path that a caller takes is the call flow.
Call Session	A call session begins when a caller dials a service or application SDN and it ends when the caller hangs up.
Key Buffering	Key buffering is when telephone set menu keys are allowed to interrupt an announcement and act as input for both the announcement block that follows it.
Palette	A palette is the area displayed to the left-hand side of the application window when it is launched.
VIM	Voice Item Maintenance is a voice recording maintenance tool
Voice Item	Voice items are voice recordings. Voice items can be standard system prompts, imported WAV files or custom voice recordings

Lesson Content: Tools Menu

CallPilot Manager Menu					
User Menu	**System Menu**	**Maintenance Menu**	**Messaging Menu**	**Tools Menu**	**Help Menu**
User Search	Server Settings	Maintenance Admin	Messaging Delivery Confirmation	Configuration Wizard	CallPilot Administration Help
Saved User Searches	Backup and Restore	Multimedia Monitor	Message Network Configuration	My CallPilot Configuration	About CallPilot Manager
Add User	Service Directory Number	Channel Monitor	Network Diagnostics	Download Player	
Auto Add	Alarm Monitors		Internet Mail Clients		
Auto Delete	Event Browser		External Email Servers		
Mailbox Classes	Performance Monitor		Messaging Management		
Shared Distribution Lists	OM Configuration		Dialing Information		
User Creation Templates			Holidays		
			Outcalling Administration		
			Restriction Permission List		
			Notification Device Classes		
			System Prompt Customization		
			Security Administration		

Lesson Content: Application Builder

Overview

Application Builder is Call Pilot's graphical interface to create and administer applications with voice and, if installed, fax functionality.

Administration of Application Builder is accessible from the CallPilot Manager or the user can install it as a stand-alone application on a desktop PC and launch it from Windows using the Start menu.

This graphical interface lets an administrator build applications by using navigational tools, customization tools, and building blocks to create an application. The applications call flow can be viewed visually on the PC desktop when an administrator accesses it. At a glance, you can see what elements make up an application and how a caller is led through that application when accessed.

What to Consider

To create user-friendly and effective applications, you must first have a plan for the purpose of the application and what it is expected to do for the caller. Following is a list of some things to consider when creating an application:

Question	Answer
Who will be calling the application?	
Does the application require a directly dialable telephone number?	
How many ports will the application require?	
What should the application be named?	
If not using the default applications IDs, what should the application ID number be?	
Do I want professionally recorded prompts?	
Are callers calling from a bilingual area?	
Will any or all of its components be used in other applications?	

Lesson Content: Application Builder, continued

What you will need

If you intent for the application you are creating to be directly dialed, some additional things must be in place before the application can be put into service. The additional items that you will need to configure are listed below:

- Phantom DNs or Dummy ACD DNs for all services(applications) that are to be directly dialable must be configured in the SDN table
- Adequate channels must be allocated for each service
- If you are offering dual languages, ensure that the appropriate language was ordered

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Guidelines for Creating Application

The design of an application is largely dependent on how it is being used. For example, some applications are simply automated attendants and their purpose is to route callers to the appropriate or desired locations.

Pre-planning can ensure that the design is implemented smoothly and quickly and can immediately be put into service for your customers.

For caller-friendly applications consider the following:

- Identify the name of the application the caller has called, for example “Welcome to ABCD company.”
- Define a default service for callers using rotary-dialed phone that reach your application
- Describe character keys accurately and consistently, for example, “To cancel, press the number sign.”
- Try not to overload the caller with too many choices
- Present options sequentially, for example, “For Sales, press 1. For Billing, press 2.”
- Provide help to the caller, for example, “To reach an attendant, press 0.”
- Help callers know what to listen for, for example, “Please choose from the following options.”

Lesson Content: Application Builder, continued

Application Builder Interface

You must become familiar with how to use the tools that are available in Application Builder via the interface. Only by familiarizing yourself with the elements and how they work can you quickly move through the process of creating applications.

When you launch a new application in Application Builder, you see several items of interest. An explanation of each item of interest follows below:

Menu Bar

The menu bar provides access to all administrative tasks, with the exception of some graphical editing functions.

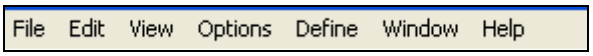

Figure 6.7.1: Menu Bar

A description of each option that appears in the drop-down list of the menu bar options for File, Edit, View, Options, Define, Window, and Help are located in the online Help drop-down list under "Help on Application Builder"; select the Application Builder Menus button.

Tool Bar

The tool bar provides quick access to commonly used administrative functions such as Open New File.

Figure 6.7.2: Tool Bar

A brief description of the tool bar icons beginning with the icons from the left are described below:

Tool Bar Icons	
Icon	**Description**
Open New File	Opens a blank file and prompts for name
Open New Application	Opens a blank application and prompts for a name
Save Application	Saves the active application file and its contents to the server

Lesson Content: Application Builder, continued

Tool Bar, contd.

Icon	Description
Print Application	Opens print dialog box and prints active application file
Zoom Out	Increases the size of the application window contents to the next higher zoom level. The maximum is 100%.
Zoom In	Decreases the size of the application window contents to the next lower zoom level. The maximum is 35%
Restore Default Zoom	Restores the zoom setting to the default, which is 100%
Delete	Removes selected items from the application window and places them on a clipboard
Duplicate	Copies selected items and places them on the clipboard
Paste	Inserts the contents that were last saved to the clipboard and places them where the cursor appears on application window.
Erase	Deletes the object selected in the application window
Display Properties	Displays the properties of a selected block
Stub/restore Output	Hides the line between two blocks and replaces it with an information box that shows the name of the block to which it is connected or vice versa
Text	Changes the cursor to a precision (+)
Help	Displays the help topic and the Application Builder tutorial

Palette

The palette provides access to all Application Builder blocks to drag and drop on to the application window.

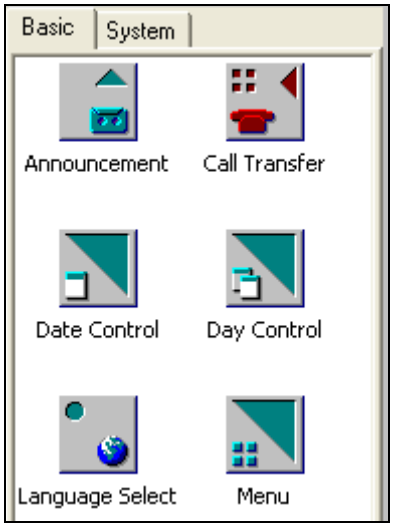

Figure 6.7.3: Palette

Three types of palettes are available for creating applications and are listed below:

Palette Type	Description
Basic	Basic clocks are individual components of functionality and are contents of an application.
System	System blocks are individual components of functionality that are directly dialable and are known as messaging services, such as Express Voice Messaging
Import	A third palette is available when an application is imported into the application. The Import/Export function is discussed in the next lesson.

Lesson Content: Application Builder, continued

Application Window

The application window provides room to create, display, and edit application files. The application window does not have a practical limit in size. Scrollbars are sued to access the entire application. The application window appears directly to the right of the palettes and always appears with the default block already on it, such as Start.

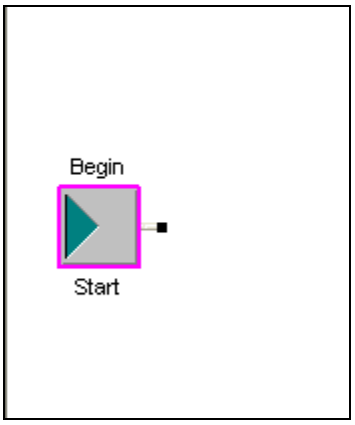

Figure 6.7.4: Application Window

Application Builder Interface

The figure below displays the entire picture of the Application Builder interface.

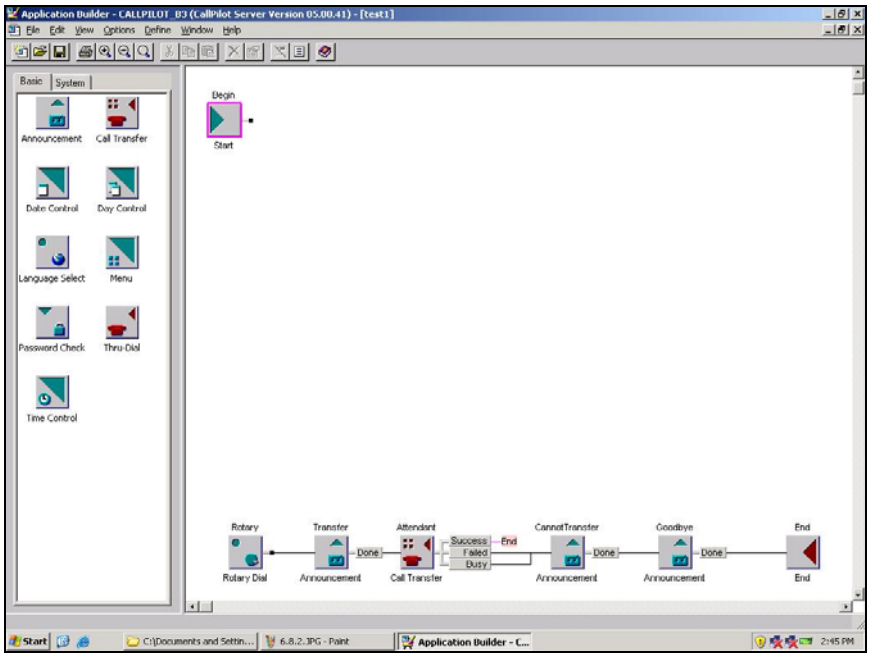

Figure 6.7.5: Application Builder Interface

Lesson Content: Application Builder, continued

Customization Tools

When you launch a new application in Application Builder, you see all of the tools that are available to create applications. You might discover that you do not want all of the tools to be displayed and prefer to have more application window space to see the application that you are creating.

This is where you can customize the palette and toolbar within the application.

When you customize the palette or toolbar, you can either show or hide them. Application Builder also lets you move the palette and toolbar. You also have the option of returning everything back to its default.

Some of the customization tools that use the View dropdown to display options are shown in the following screen shots.

Blocks

A block determines the function to be performed within an application. When you add blocks to an application, you are adding functionality, such as call transfer.

Each block has a specific function that it performs within the application, either individually or in conjunction with other blocks.

When all the blocks are configured and connected, you have an application.

Without the blocks, you have nothing.

How to Use Blocks

To be a part of an application, a block must appear in that application's window. You usually do two things to a block: connect and configure.

When you have the blocks that you want for an application sitting on the application window, you are ready to connect and configure them. You always need to connect all of the blocks in an application; however, you might only need to configure certain blocks.

Connect

When connect a block, you are essentially attaching one block to another via the block output.

Configure

Configuring indicates that you open a block and define its parameters, such as attaching voice items and fax items. Not all blocks need to be configured.

You can determine if a block needs to be configured by opening it. If you receive the "This block has no input parameters" message, then it does not have a configuration. Simply connect its output to another block.

Lesson Content: Application Builder, continued

Working with Blocks

Learn to recognize the parts that make up a block. These parts determine how the block works when accessed by a caller. When added to an application, a block acquires two things: a pink border and an output.

Pink Border

A pink border appears around the edge of each block, like a pink square. This is a visual indicator that you must connect and configure the block. After the block is connected and configured, the pink border disappears.

These types of visual indicators are useful when troubleshooting applications or looking for incomplete parts; however, this does not mean that all troubleshooting problems are solved if all the blocks have no pink borders. Sometimes the problem can be elsewhere in the application, for example, in the restriction permission tables.

Copy and Paste

Eliminate the need to create work that was already defined elsewhere by performing a copy and paste function.

When you copy selected items, you are essentially duplicating them and saving them on a clipboard to rest until you are ready to paste them into another application. To paste copied items in an application, select paste, and use the mouse precision symbol (+) to choose where the copied item should be placed in the application window.

Every copy you perform writes over the previous copy.

Outputs

Outputs appear on the right-hand side of each block. Outputs connect blocks to each other. An output appears as a line between two or more blocks to show that a connection exists between them. Output connections determine how the call flows through an application when a caller accesses it.

Outputs can be viewed fully drawn or as stubs. Fully drawn shows the line from point A to point B, while line stubs are short lines with a text box on the end of it that has the name of the block to which it is connected.

Line stubs are an effective way to manage the confusion that can be created when you have too many lines going in every direction. Line stubs have no effect on how the application flows when it is accessed. Refer to the figures below for an example of an output and a line stub.

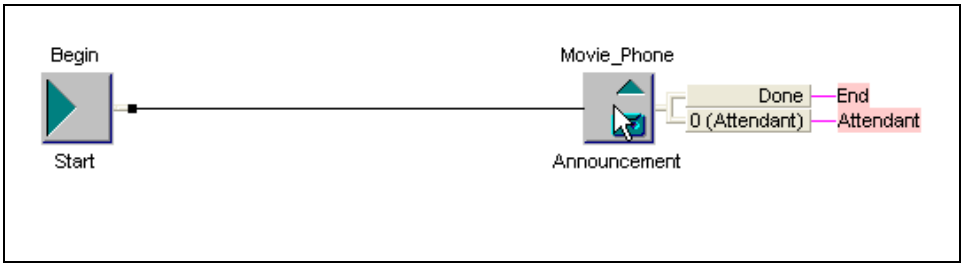

Figure 6.7.6: Output Example

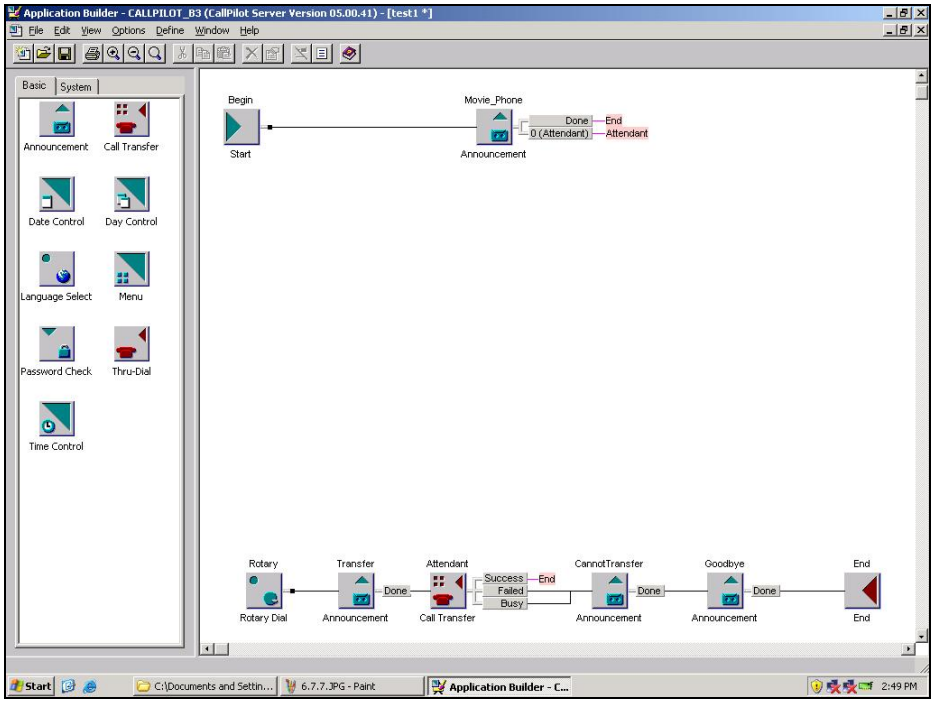

Figure 6.7.7: Line Stub Example

Customizing Outputs and Lines

Customizing the outputs and lines of an application determines how they appear in the application window. Customize your applications by managing the outputs and lines that appear in your application. This ensures that the application is easy to read and translate.

Four methods were developed to assist with managing outputs. The first bullet is the default that Application Builder uses for new applications. The next three bullets are customizations. Let's look at each of them.

- Outputs fully drawn and automatically routed (default)
- Stubbing lines
- Hiding outputs and lines
- Outputs fully drawn and manually routed

Stubbing Lines

A line measures its full length when it connects one block to another block. If the blocks are far apart, then the line that connects them is long and hard to follow. You can remedy this confusion by stubbing the line. Select the block output that you want to stub, and when it appears red, you can stub from the Edit menu bar or by a right mouse-click the desired connecting block. You can stub multiple outputs by selecting one, holding down the Shift key, and selecting each additional output to be stubbed.

Hiding Outputs and Lines

When you hide outputs and stub lines, you create a spacious and uncluttered application that is easy to read and comprehend. As a result, you have more room to place and arrange blocks in the application window. This is especially helpful for those menus with multiple choices.

Outputs Fully Drawn and Manually

When creating applications, you might discover that you want a line connection between two blocks to appear in a specific manner. Application Builder lets you adjust the line that connects two blocks to reroute it and prevent it from crossing other lines. Double-click the line and click a handle end. Hold down the mouse button and drag the handle in the direction that you want the line to move.

Lesson Content: Application Builder, continued

Cancel Line Customization

If you customize your line and find that it does not meet your satisfaction, you can let Application Builder reroute it for you. Rerouting cancels a previous adjustment and reroutes the line along its default path. To do this, click the line you want to readjust and from the Edit menu, click **Reroute line**.

Other Customization Tools

If you need to connect multiple blocks, lines, or outputs at the same time (for example, copying, pasting, or deleting), hold down the **Shift** key and clock each **block, line,** or **output** that you want to select in that application window. Outputs appear red when selected.

When you are working in an application that someone else has created and all of the outputs connecting to the blocks appear as stubbed (collapsed) lines, it can be difficult to decipher how blocks are connected, especially in a large application. Remedy this by restoring the stubbed line to give you a graphical picture of how blocks are connected. Restore a stubbed line by clicking the collapsed line that you want to restore and clicking the **Stub/Restore** line from the Edit menu.

Lesson Content: Application Builder, continued

Getting Started Creating Applications

Before you can design your application using the blocks, you must first create an application file.

The application file acts like a folder. Its primary function is to store the contents of an application (for example, blocks and any associated voice items or fax items).

When you select **New** from the file menu, you are defining an application's folder name.

When you save the application you design in the application window, you are saving it to the application file that you defined for the application. When you want to view that application, select its application file to view the contents of the application.

Locking and Unlocking the Application

When you open an application to review its configuration, you are locking that application and preventing other administrators from accessing it. Other users cannot make changes to it while you have it open.

When you finish modifying an application or viewing the configuration, you must unlock it. Unlock an application when you close it. By closing the application, it becomes available to others for viewing and modifying.

Locked application files do not impact callers who are dialing into an application in any way. When an administrator makes changes and modifications to an application, the changes are transparent to calls in progress. After changes are saved, any new calls interact with the saved version of the application.

You can use the Locks dialog box to see the names of the applications on the server that are currently locked.

Lesson Content: Application Builder Blocks

Overview

To understand Application Builder blocks, you need to know which components make up an application and understand the function of a block within an application. The blocks discussed in this lesson are those that appear on the basic palette and the system palette.

Basic Palette Box

Basic Palette Blocks include the following:

- Announcement
- Call transfer
- Date control
- Day control
- Time control
- End
- Language select
- Menu
- Password check
- Rotary dial
- Start
- Thru-dial
- Unavailable

System Palette Blocks

System Palette Blocks include the following:

- Custom Commands
- Express Voice Messaging
- Multimedia Messaging
- Speech Activated Messaging

What Makes an Application

An application is made up of blocks, voice recordings, and faxes. It can contain only one of these items, or multiples of each item within a single application.

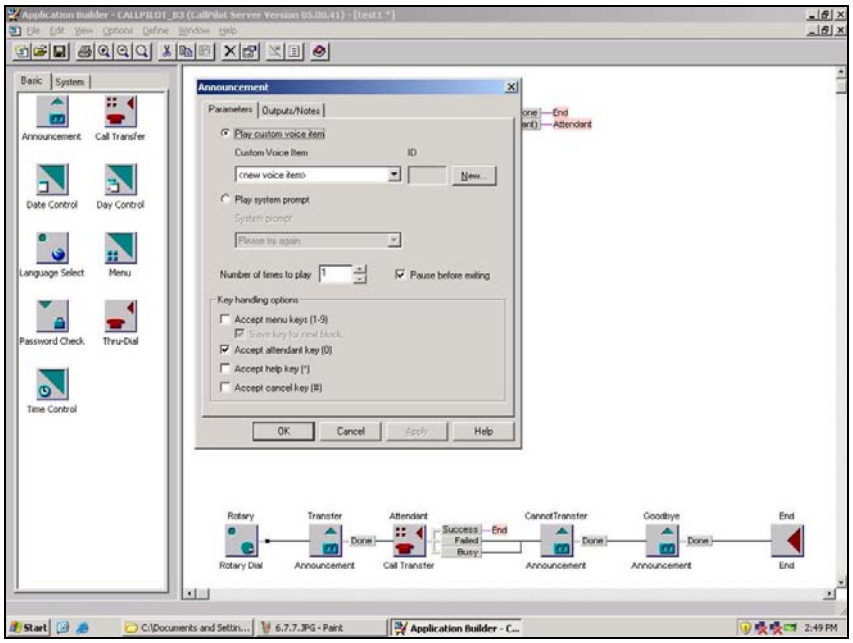

Figure 6.7.8: Application Builder Palette, Showing the Basic Blocks

Lesson Content: Application Builder Blocks, continued

Default Blocks

Basic blocks provide the general functionality for an application, such as announcement. Every application that uses basic blocks requires some customization before it is complete. For example, if a call transfer block is used, you must specify the number to which the system redirects calls.

When you begin building applications, three specific blocks appear on every application, but do not appear in the palette. These blocks cannot be cut, copied, deleted, or renamed, and they only appear once in an application. They are Start, End, and Rotary Dial.

Block	Definition
Start	The Start block begins an application by directing its flow. You must connect the Start block's single output to another block. It does not require configuration.
Rotary Dial	The Rotary Dial block ensures that callers who use a rotary dial telephone reach a live attendant. You only connect the Rotary Dial block. It does not require configuration.
End	The End block terminates an application in one of two ways: disconnects callers from an application or transfers callers to a service. The End block does not require any configuration. Instead, you must connect other blocks to the End block when you want the call to end.

When a new application is created, a set of blocks appear by default towards the bottom of the application screen. The purpose of these blocks is to redirect a caller who does not enter DTMF input.

By default, the Rotary Dial block is connected to the Transfer Announcement block. You can redirect the call flow of any of these blocks based on the needs of your application. These blocks can be copied, cut, renamed, or deleted. To activate any of these blocks, you must connect an output from a block you have configured to one of the predefined blocks.

Basic Block Palette

Basic blocks provide general functionality to an application, such as call transfer. In Application Builder, the basic blocks appear on the left side of the application window and are located in an area called the palette.

Each Basic palette has all of the blocks that are needed to create effective applications. If the fax option is installed, two additional blocks appear on this palette. They are Fax Send and Fax Select.

The first thing you see when you drag a Basic block onto the application window is an Add (name of block appears) block dialog box prompting you to name the block. Block names must be unique and cannot be repeated within the same application. The descriptive title you enter here will be the words you see above the block when you view it onscreen or print the application.

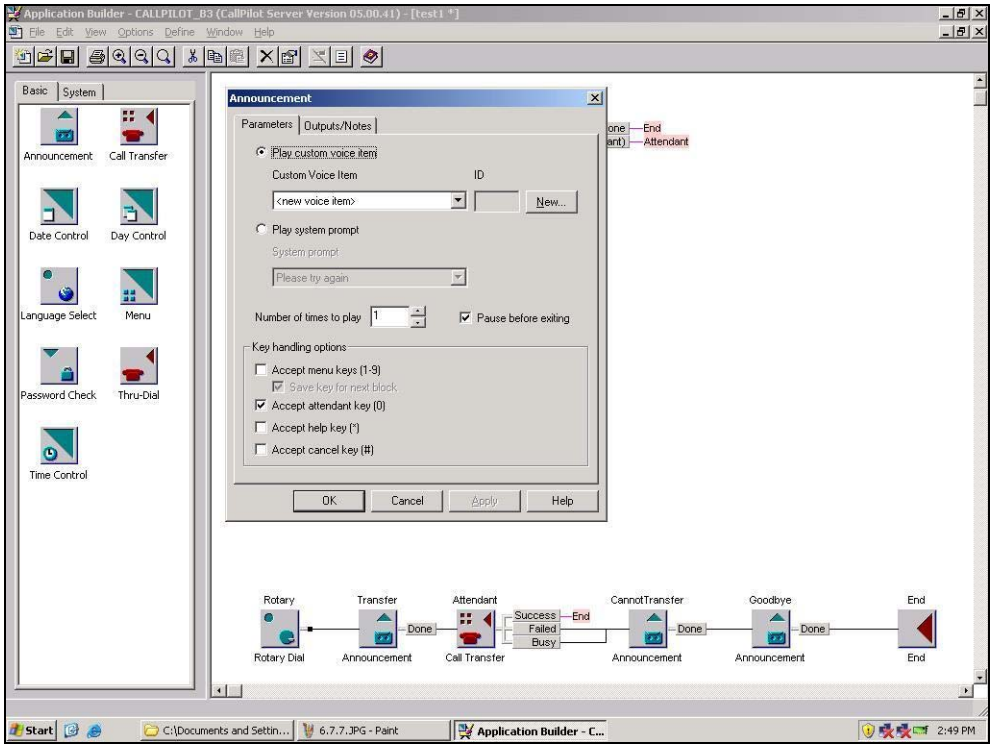

Figure 6.7.9: Application Builder, Announcement Block

Announcement Block

After you have named the block, you are ready to begin configuring the Announcement block. This involves choosing the type of voice recording to be used and the number of times it plays to the caller. It also identifies which telephone keys can interrupt an announcement and whether or not they can be buffered. An explanation of the Announcement properties begins below.

Announcement Block—Parameters Tab

The Announcement block properties page has two tabs: Parameters and Outputs/Notes.

Following is a list of the fields of the Parameters tab:

Field	Description
Custom Voice Item	Identifies the name of the voice item that contains the custom-recorded announcement.
ID	Identifies, by number, the voice item that contains the custom-recorded announcement.
System Prompt	Identifies by name the system prompt that is used for the announcement.
Number of Times to Play	Indicates how many times the announcement should play to the caller before taking an action.
Pause before exiting	If checked, this indicates that a silent pause follows the last play of an announcement.
Accept Menu Keys (1–9)	If checked, this lets a caller bypass the announcement and input the menu option the caller wants while the announcement is playing.
Store Key in Buffer	If checked, this applies the caller input (key press) to the block that follows it (usually a menu block).
Accept Attendant Key (O)	If checked, it lets callers zero out to a live operator.
Accept Help Key (*)	If checked, it lets callers receive help. Help is usually a live operator or some other type of recorded instruction.
Accept Cancel Key (#)	If checked, it lets callers cancel previous activity.

Outputs/Notes Tab

Field	Definition
Outputs	Shows where callers go in the application after the announcement stops playing and, if enabled, which key handling option is used.
Notes:	A space provided for you to record important reference information that can be useful to others or as a reminder.

Call Transfer Block

The Call Transfer block transfers callers to the default attendant or to a specific extension number.

Configuring the Call Transfer block involves specifying the number to which callers are transferred and configuring an optional transfer greeting.

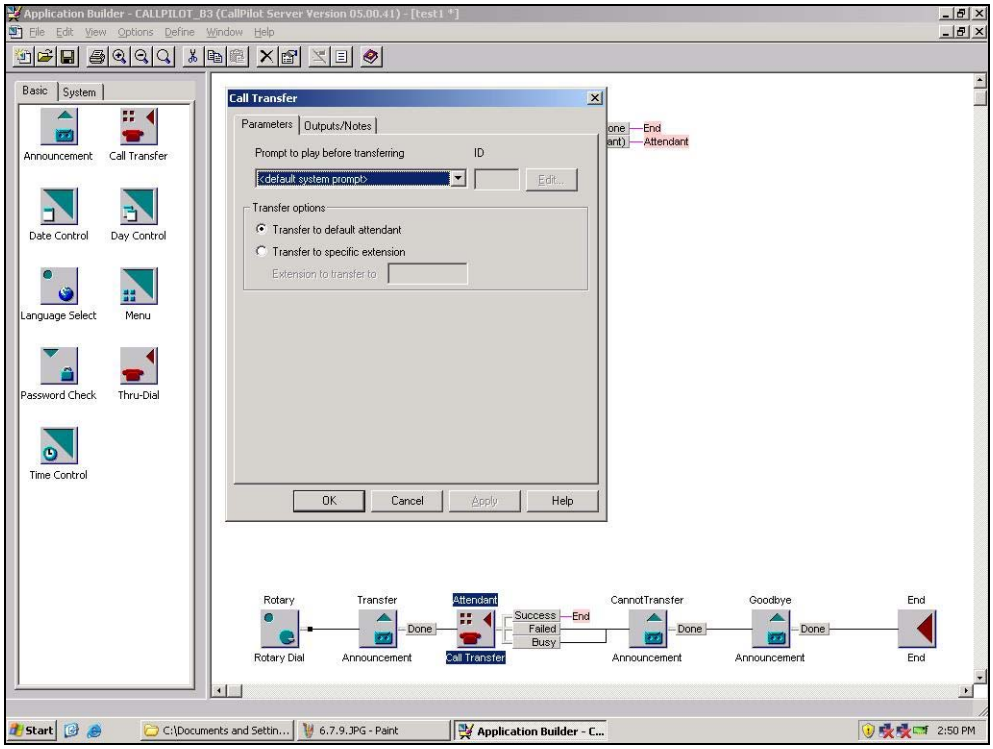

Figure 6.7.10: Application Builder, Call Transfer Block

Call Transfer—Parameters Tab

Following is a list of Call Transfer Block parameters:

Parts	Functions
Prompt to Play Before Transferring	Identifies the name of the system prompt or the name of the voice item that plays to the caller before transferring the call.
ID	If a system prompt is not used, this identifies the custom voice item number that is associated with the call transfer prompt.
Transfer to Default Attendant	If selected, callers are transferred to the default attendant
Transfer to Specific Extension	If selected, you can specify the extension to which callers are transferred.
Extension to Transfer to	Shows the number of the on- or off-switch extension to which callers can transfer.

Call Transfer—Outputs/Notes Tab

Parts	Functions
Outputs	Shows where callers go in the application if the line is busy or if the call transfer fails. A successful call transfer ends the call.
Notes	A space to record additional information about the block.

Date Control Block

The Date Control block routes callers to different blocks in an application based on the day and month. Define the Date period to configure the Date Control block.

A date period defines the calendar days during which an application routes callers to a specific part of the application. Up to five subperiods make one date period. A date subperiod consists of both a start and end date determined in months and days.

You can overlap the dates in a subperiod or you can have a begin date that is later than the end date. This makes the system assume that the date period wraps from one year to the next. To have a subperiod that lasts 24 hours (one day), enter the same date for both the beginning and end date.

When callers access an application, the system compares the current system date with the date in each subperiod. If callers are calling during dates defined in a subperiod, they are calling inside the date period and if not, it's outside the date period.

Data Control Block—Parameters Tab

The Data Control block properties page has two tabs: Parameters and Output/Notes. Following is a list of the fields for the parameters and output/notes tabs:

Field	Definition
Date period settings From (mm/dd):	Shows in months (mm) and days (dd) the start date of a date subperiod for up to five subperiods.
Date pending settings To (mm/dd):	Shows in months (mm) and days (dd) the end date of a date subperiod for up to five subperiods.

Data Control Block—Outputs/Notes Tab

Field	Definition
Outputs	Shows where callers go in the application if they call either inside or outside the defined date period.
Notes	A space to record additional information about the block.

Day Control Block

The Day Control Block routes callers to different blocks in an application based on the day of the week or whether it is a holiday as specified in the Message Administration Holiday tab.

The Day Control Block has two tabs: Parameters and Output/Notes. Following is a list of the fields for the parameters and output/notes tabs:

Day Control Block—Parameters Tab

Field	Definition
Click for Holidays	If checked, the system verifies whether the caller is calling on a defined holiday.

Day Control Block—Outputs/Notes

Field	Definition
Outputs	Shows where callers go in the application, depending on whether they call on a weekday or a holiday.
Notes	A space to record additional information about the block.

Time Control Block

The Time Control block routes callers to different blocks in an application based on the time of day.

Define a time period to route callers to specific parts of an application based on the time of day (for example, business hours or non-business hours) to configure Time Control block. Calling inside or outside a time period determines the call flow.

A time period defines the time of day in subperiods. A subperiod consists of five separate times of day that make up one time period. Each subperiod has a start time and an end time specified in hours and minutes for a 24-hour format.

The Time Control Block has two tabs: Parameters and Output/Notes. Following is a list of the fields for the parameters and output/notes tabs.

Time Control Block—Parameters Tab

Field	Definition
Time Period Settings (Specify Times Using 24-hour Clock): From (hh:mm)	Defines the start time in hours and minutes
Time Period Settings (Specify Times Using 24-hour Clock): To (hh:mm)	Defines the end time in hours and minutes

Time Control Block—Outputs/Notes

Field	Definition
Outputs	Shows where callers go in the application depending on whether they call inside or outside of a defined time period.
Notes	A space to record additional information about the block.

Language Select Block

The Language Select block changes the current language for all the system prompts.

Choose the language that system prompts play to configure the Language Select block. Multiple languages must be ordered, and only the installed languages can be selected.

A language specified by the Language Select block remains the current language until it encounters another Language Select block. All system prompts after this block play in the specified language. This includes any imported applications and system services, such as Express Voice Messaging. This block does not affect custom voice items.

The Language Select Block has two tabs: Parameters and Output/Notes. Following is a list of the fields for the parameters and output/notes tabs:

Language Select Block—Parameters Tab

Field	Definition
System prompting language	Provides a list of installed languages that are available on the system.

Time Control Block—Outputs/Notes

Field	Definition
Outputs	Shows where callers go in the application
Notes	A space to record additional information about the block

Lesson Content: Application Builder Blocks, continued

Menu Block

The Menu block gives callers the choices that correspond to the keys on their telephones.

When you have named the block, you are ready to configure the Menu block. This involves giving callers options to select and specify the voice items that are to be used by the menu.

A menu is typically combined with the other blocks.

The Menu block properties page has two tabs: Parameters and Output/Notes. Following is a list of the fields for the parameters and output/notes tabs:

Menu Block—Parameters Tab

Field	Definition
Menu Choices Greeting	Identifies the name of the voice item that has the custom-recorded description of the menu key and its service. For example, "Welcome to ABC Inc. For English, press 1. For Spanish, press 2".
ID	If a system prompt is not used, this identifies the custom voice item number that is associated with the menu choices greeting.
Allow retries after no response	If checked, determines the number of no response retries before the system provides the no response action specified for the application.
Number of no response retries	This indicates how many times callers can give a no response (no DTMF input) before the menu forwards to the block specified for Max No Responses.
No response prompt	Identifies the voice item to be played to callers if they have not pressed a key for a set period of time.
Reply menu choices greeting after no response	If checked, the application replays the menu choices if the caller does not respond.
Allow retries after invalid response	If checked, this provides callers another opportunity to respond if they press an invalid key option.
Invalid response prompt	Identifies the voice recording that informs callers that they have made an invalid selection.
ID	If a system prompt is not used, this identifies the custom voice item number that is associated with the menu choices greeting.
Replay menu choices greeting after invalid response	If checked, the application replays the menu choices if the caller presses an invalid key.

Password Check Block

The Password Check block verifies the passwords entered by callers and gives the callers with correct passwords access to the protected areas of an application.

The Password Check block properties page has two tabs: Parameters and Output/Notes. Following is a list of the fields for the parameters and output/notes tabs:

Password Check Block—Parameters Tab

Field	Definition
Password Prompt	Shows the name of the voice item that is played to callers.
ID	If a system prompt is not used, this identifies the custom voice item number that is associated with this block.
Maximum Number of Password Entries	Defines how many times a caller can enter an incorrect password before exiting the application.
Passwords to Check Password 1 (up to 5):	If checked, shows that a password was defined for the block.
Password to Check Passwords	Password: Passwords are numerical and correspond to one of the blocks five outputs. A maximum of 16 digits is allowed. Passwords appear as asterisks (*).
Confirmation	A method of verifying the password just entered.

Password Check Block-Outputs/Notes

Field	Definition
Outputs	Shows where callers go in the application if they enter the correct password or exceed the maximum incorrect passwords allowed. The maximum invalid entries are defined in the session profile.
Notes	A space to record additional information about the block.

Thru Dial Block

The Thru-Dial block provides an automated attendant service that transfers callers to the extension they choose. To configure a Thru-Dial block, select a voice item to play as the greeting and define whether callers can dial by name or number or both.

Thru Dial Block—Parameters Tab

The Thru-Dial block Properties page has two tabs: Parameters and Output/Notes. Following is a list of the fields for the parameters and output/notes tabs:

Field	Definition
Thru-Dial Greeting	Identifies the name of the voice item or system prompt that plays to callers when they encounter the Thru-Dial block.
The following system prompts play to a caller depending on the option configured in the Thru-Dial block:	
Thru-Dial option	Name dialing
System prompt:	Please enter the name of the person you wish to reach, followed by number sign. To enter a name, spell the last name and then spell the first name.
Thru-Dial option	Variable length number dialing
System prompt	Please enter the number of the extension you wish to dial, followed by number sign.
Thru-Dial option	Fixed length number dialing
System prompt	Please enter the number of the extension you wish to dial.
Thru-Dial option	Name and number dialing
System prompt	Please enter the number or the name of the person you wish to reach, followed by number sign. To enter a name, press 1-1, spell the last name and then spell the first name.
ID	If a system prompt is not used, this identifies the custom voice item number that is associated with the invalid response prompt.

Thru Dial Block—Parameters Tab, contd.

Field	Definition
Allow Dial by Number	Indicates that the Thru-Dial block is configured for number dialing only.
Use Fixed Length Numbers	If checked, indicates that callers must enter DNs of a specific length. To enter shorter numbers, callers must terminate entries with the pound (#) key. If not checked, indicates that callers can enter up to 13 digits for a DN and terminate them with a pound (#) key.
Length	Shows the number of digits that callers must enter. Callers cannot enter more digits than specified, and if they enter fewer digits and terminate them with the pound (#) key, the system adds left-pad digits to the entered digits to obtain the required number of digits.
Left Pad	This can show an optional string of digits that can prefix any number that is shorter than the fixed length.
Restriction/permission List	Shows the RPL used to limit the numbers that can be dialed using the Thru-Dial block.

Thru Dial Block—Outputs/Notes Tabs

Field	Definition
Outputs	Shows where the caller goes in the application if the Thru-Dial fails. A successful Thru-Dial ends the call. Shows where the caller goes if he presses the 0 (attendant) or # (pound) keys and if no response is given.
Notes	A space to record additional information about the block.

Lesson Content: Application Builder Blocks, continued

How to Create Voice Items

Voice items are custom-made voice recordings. You can use a telephone to record your own voice items, or you can import a sound file in the WAV format. For example, when a caller hears "Welcome to Nortel Networks," he is hearing a voice item.

To identify a voice item on the server, you must first define it. To define voice items, go to the Define menu and select Voice Items.

Select the Add button and the following dialog box appears so that you can define your voice item.

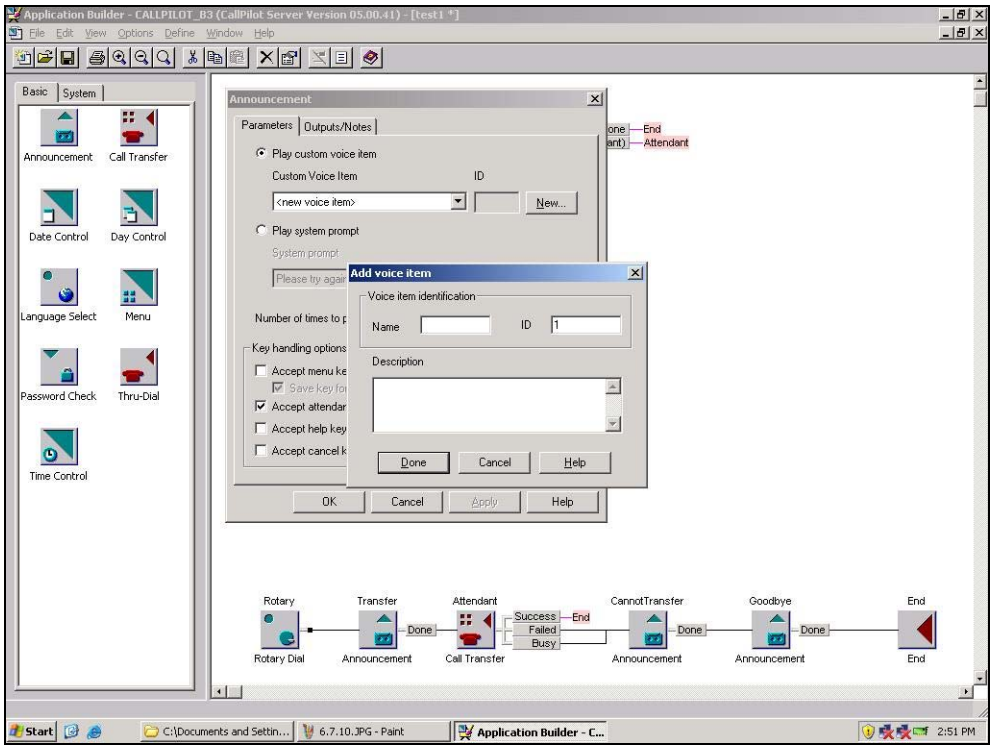

Figure 6.7.11: Voice Item Dialog Box

Assign a name for the voice item. If you are not using the default ID numbers associated with a new voice item, you must assign a voice item ID number. A description can be added to the dialog box to aid administrators in routine maintenance. Usually, the voice item is typed out here in the same manner that a caller hears it.

The next step is to associate voice prompts with the voice item by either recording them from a telephone or importing via a pre-recorded WAV file.

File Properties

To verify if an application is complete, view the status of the application by selecting File and then Properties.

The fields on the File Properties page are described below.

Application Identification Section

Field	Definition
File name	Shows the name of the active application
Application ID	Shows the identification number assigned to the application
Volume ID	Shows the system volume where the application resides
Description	Area where a short description of application can be entered.
Spoken Name	Record or import the spoken name for the application

Application Status Section

Field	Definition
Complete	Shows whether or not the application is complete
Exported	Shows whether or not the application was exported

Lesson Content: Application Builder Blocks, continued

System Blocks

On the palette is another tab titled System. From this tab, you can access system blocks that has already been created; they are known as services. Use these blocks in your application to link them to the services desired.

System services can be accessed outside of an application or in an application.

Any time you drag a block onto the application window, a dialog box prompts you to name that block. System block names must be unique and cannot be repeated within the same application. The descriptive title you enter here appears at the top of the block.

Custom Commands Block

The Custom Command block provides a way for the user to train CallPilot to recognize his speech when speaking commands for the Speech Recognition feature. This is also knows as speech control training.

After you have named the custom command block, you are ready to connect its output. No configuration is required for this block. The block's output must be connected.

The Custom Commands block properties page has two tabs: Parameters and Outputs/Notes page. Following is a list of the fields for the parameters and output/notes tabs:

Custom Commands Block—Parameters Tab

This block has no input parameters.

Custom Commands Block—Outputs/Notes Tab

Field	Definition
Outputs	Shows where callers go in the application when they encounter the Custom Commands block.
Notes	A space to record additional information about the block.

Express Voice Messaging Block

The Express Voice Messaging block provides a means for transferring callers to the Express Voice Messaging service. This service lets callers leave a voice message in a specific mailbox.

After you name the Express Voice Messaging block, you are ready to configure the block. To configure a system block, define the mailbox options or speech recognition options. Not all system blocks need to be configured. All system blocks require that the outputs are connected.

The Express Voice Messaging block properties page has two tabs: Parameters and Outputs/Notes page. Following is a list of the fields for the parameters and output/notes tabs:

Express Voice Messaging Block—Parameters Tab

Field	Definition
Allow Callers to specify Mailbox Number	If selected, lets callers specify the number of the mailbox they wish to have their messages delivered to.
Use Specific Number	If selected, you specify the mailbox to which all voice messages should be delivered. If activated, the following box is enabled: Mailbox: Shows the number of the mailbox to which all voice messages are delivered

Express Voice Messaging Block—Outputs/Notes Tab

Field	Definition
Outputs	Shows where callers go in the application when they encounter the Express Voice Messaging block.
Notes	A space to record additional information about the block.

Lesson Content: Application Builder Blocks, continued

Reusing Created Applications

Reusing application can occur in one of two ways: Save as and Import.

Save As

When you save an application under another name using the File menu bad Save as… option, you are essentially copying the entire application and saving it to a new name and new ID.

When you save an application under another name, ensure that the name and ID you define are unique and do not exist elsewhere on the server.

Export Application

To export an application, you must first make sure that the application is a complete application. Exporting applications is an effective means of reusing existing functionality. To reuse an application, you must export (source) an application and then import (destination) into the desired application.

The first step is to open the application that you want to export and select Export from the File menu.

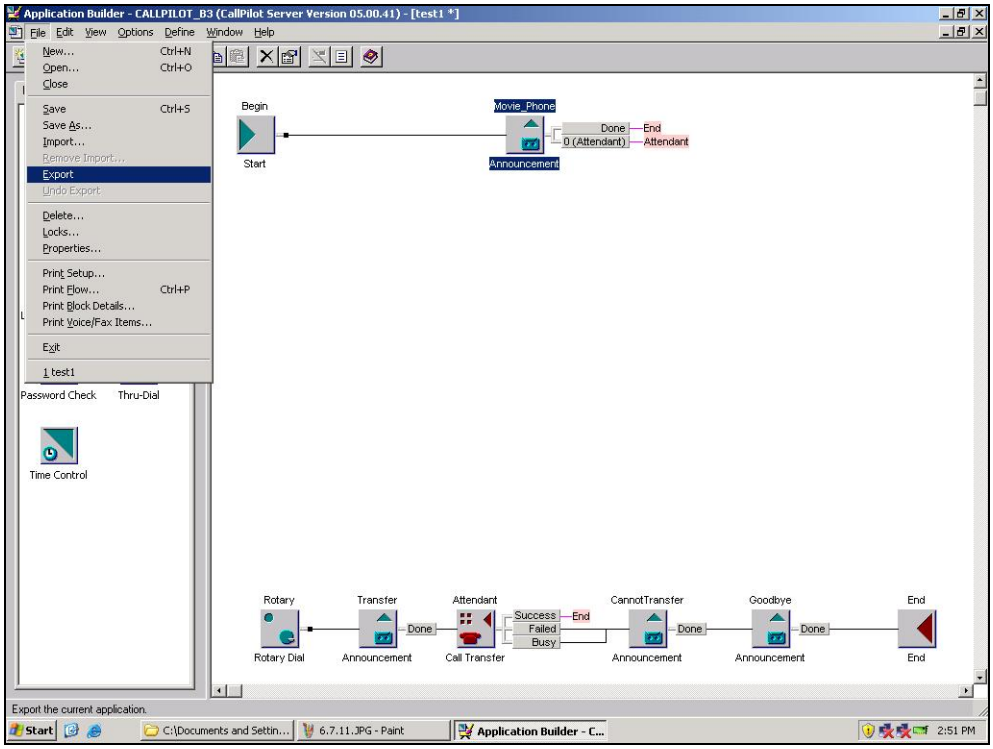

Figure 6.7.12: File Menu, Showing Export Command

Continue Block

The Continue block appears in the application window of the application you exported. It indicates that this application is available to be imported into other applications.
The Continue block is also used to direct control flow in an exported application. When an application makes use of another application via import, the Continue block can be used to return the caller to the importing application. In the application that is exported, connect the Continue block to all lines meant to pass control back to the calling application.

Import Application Block

The second step is to import the source application into the destination application.

To import an application within the destination application, select File, Import and choose the desired source application from the Import dialog box.

When an application is selected from the Import dialog box, it appears on the Imported Application block palette.

If this is the first application to be imported, the system automatically creates the Imported Application block palette.

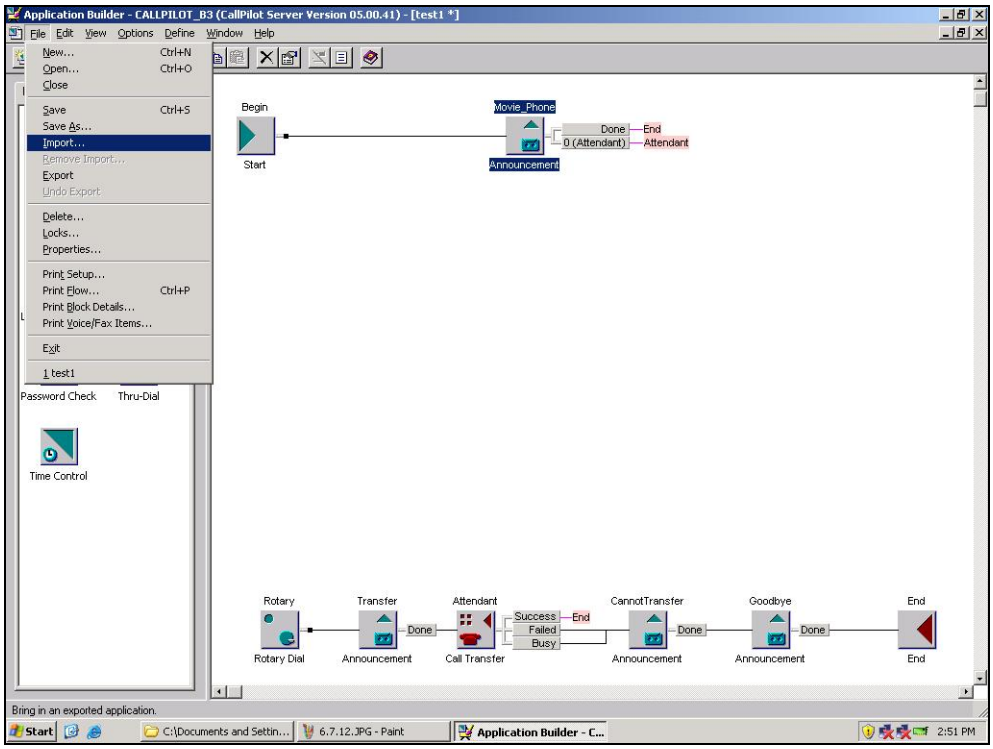

Figure 6.7.13: Import Application Block

Remove an Import

If you determine that the application no longer needs to use the imported application functionality, remove it by selecting File and Remove Import.

Lesson Content: Application Builder Blocks, continued

Undo (Remove) an Export

If you no longer have a need for the source (exported) application, undo the export by selecting File and Undo Export. Before selecting Undo Export, ensure that all the references to the source application were removed (for example, imported applications).

Unavailable Block

The Unavailable block indicates that either an imported application or a fax function is missing from the imported application.

The unavailable block can occur due to the imported application not being complete or because during the import, a portion of the application became corrupted. The Unavailable Block appears in the application window to indicate that the block cannot communicate with an imported application.

Correcting an Unavailable Block

To fix an application that has lost some imported functionality, locate the imported application and ensure that it is complete. You can then go to the importing application and delete the Unavailable block and re-import the application.

If you are unable to locate imported applications, you must then delete the Unavailable blocks and re-configure and re-connect the missing blocks and outputs.

Practice Activity: Application Building Blocks

Directions In this exercise, you will set up an multiple Voice mail Applications and link them to create a cohesive Auto Attendant system. Complete Work Order 32.

Summary

Lesson Summary

In this lesson, you learned about the Application Builder and how to use Application Builder Blocks. Upon completion of this student guide and after the lesson presentation and practice exercise, you should be able to:

7.14 PROGRAM an Auto Attendant with 100% accuracy as evidenced by a positive function check.

7.14.1 REVIEW manufacturer's documentation

7.14.2 DETERMINE customer configuration

7.14.3 PERFORM function check

7.14.4 COMPLETE unit documentation

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