CallPilot

Application Builder Guide

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CallPilot
Application Builder Guide

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Contents

Section B: Working with text notes   77

4   Understanding blocks   83

Section A: Introduction to blocks   85

Section B: Basic blocks   93

Section C: System blocks   149

Section D: Imported application blocks   161

5   **Working with blocks**   **181**

Chapter 1

Getting started with Application Builder

In this chapter

What is Application Builder?

Definition

Application Builder is a graphical software program that enables you to create multimedia applications. Callers access these functions by dialing telephone numbers.

About Application Builder

Use the basic version of Application Builder to create applications that contain only voice. Use the fax option feature to create applications that contain voice items, fax items, or a combination of both.

Examples of applications

The following are examples of a voice application and a fax application.

Voice application

A voice application is any application that gives callers information through voice recordings only.

An automated attendant is a typical application that you can create in Application Builder. This application enables callers to access different people or departments through several menu options. The application can also route callers to services based on the time of the day or the day of the week.

An automated attendant begins with the following type of greeting: "Welcome to ABC Company. To transfer to our marketing department, press 1. To transfer to sales, press 2." As one of its options, a menu can enable callers to dial a person. For example, callers hear the following message: "To dial the number of the person you want to reach, press 3." After pressing 3, callers hear the following message: "Enter the phone number of the person you want to reach, followed by number sign."

Fax application

A fax application is any application that gives callers information through both voice recordings and faxes.

For example, the automated attendant gives callers the option to receive a fax showing a map of ABC Company's location. Callers hear the following message: "To receive a map via fax that shows where we are located, press 4." After pressing 4, callers hear a confirmation prompt that describes the fax: "Map of ABC Company's location in New York City." To select the fax for delivery, callers press the appropriate number on their phoneset keypads.

See also

For information about creating applications, see Chapter 2, "Creating applications."

What's new in this guide

AutoSave

This feature allows you to specify the interval, in minutes, between the automatic saving of the application on which you are working. All of the data is saved on the local client machine. To make this application available to new callers, save it to the server via the toolbar or the File menu.

AutoName

This feature automatically generates a block name when you add that block to your application. The name of the block depends on the type of block being added.

You can use this command to speed application development or to test caller scenarios. This option is not recommended for inservice applications as they should use meaningful names to indicate the behavior of that application.

Most recently used files list

This option is located under the File menu and displays the ten most recently used files.

Cursor keys

The following cursor operations are now supported:

- Page Up
- Page Down
- Page Left
- Page Right
- Home

This list is located under the View menu.

Rotary outputs

Rotary outputs are now shown on the following blocks:

- Menu block
- Thru-dial block
- Password Check block
- Fax Select block

Previously, callers using a rotary dial phoneset were transfered, by default, to the Rotary Dial block if they did not provide input during a call. Administrators can override this default behavior by reconnecting the Rotary output of each of the blocks listed above.

Related information products

Introduction

The following list of CallPilot technical documents are stored on the CD-ROM that you receive with your system. You can search the entire suite of documentation online, or you can print part or all of a guide.

Planning and engineering guides

Use these guides before you install CallPilot to help plan your system, and to plan a migration of data from Meridian Mail to CallPilot.

Document Title
Planning and Engineering Guide
Meridian Mail to CallPilot Migration Utility Guide

Installation and configuration guides

These guides describe how to install hardware and software for the CallPilot server, client, and desktop messaging. Instructions for configuring the switch are also provided.

Document Title
200i Installation and Configuration Guide
702t Installation and Configuration Guide
1001rp Installation and Configuration Guide
Desktop Messaging Software Installation and Maintenance Guide

Administration guides

These guides provide specialized information to help you configure CallPilot, administer and maintain it, and use its features.

Document Title
Getting Started Quick Reference Card
Administrator's Guide
Reporter Guide
Application Builder Guide
Monitoring and Security for the Administrator

Networking guides

These guides describe how to plan, install, set up, and troubleshoot networking services.

Document Title
Network Planning Guide
AMIS Implementation and Administration Guide
Integrated AMIS Implementation and Administration Guide
NMS Implementation and Administration Guide
Enterprise Implementation and Administration Guide
VPIM Implementation and Administration Guide

End user guides

These guides are intended for end users of CallPilot, such as phoneset users and desktop messaging users.

Document Title
Multimedia Messaging User Guide
Speech Activated Messaging User Guide
Desktop Messaging Quick Reference Guide

Troubleshooting reference

This reference provides step-by-step troubleshooting procedures for CallPilot.

Document Title
CallPilot Troubleshooting Reference

Using the online Help, guides, and tutorials

CallPilot contains three online sources for information:

- Online Help provides brief answers to the questions "What's this?" and "How do I...?"
- Online guides provide detailed conceptual information, as well as information on how to perform detailed tasks.
- Online tutorials provide a complete product overview, as well as specific information on how to use Application Builder.

You can access all information using either the Help menu or Help buttons.

Contacting technical support

Contact your distributor's technical support organization to get help with troubleshooting your system.

Contacting Nortel Networks

If you have comments or suggestions for improving CallPilot and its documentation, please contact Nortel Networks at the following web address:

http://www.nortelnetworks.com/callpilot_feedback

Application Builder in a client and server environment

Introduction

Before you begin to create applications, you must understand the relationship between a client and the server.

Client

You create applications, such as automated attendants, on the PC, which is called a client. A client runs Application Builder and communicates with the CallPilot Server. Other clients can also access the server and its applications. As a result, administrators at other sites can help you to maintain applications.

Server

The CallPilot Server stores all the new applications.

An application can be opened or used by only one client at a time. If you try to open an application that is already open, the server denies you access and notifies you that another client is using the application.

In the example on the next page, Client 25 has Application 2051 open, Client 12 has Application 1020 open, and Client 3 has Application 2050 open. Therefore, Client 8 cannot access Application 2051, Application 2050, or Application 1020.
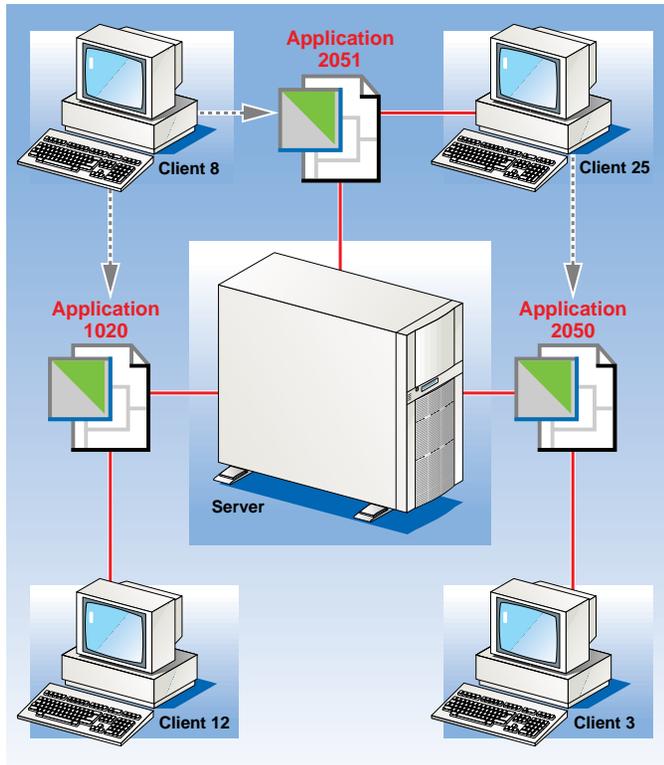
G100879

What are applications?

Definition

An application contains voice and fax functions that callers can access by dialing phone numbers.

Parts of an application

An application is made up of blocks, voice recordings, and faxes.

Blocks

Each block in an application has a specific function. For example, the Announcement block provides the primary way to play voice. To build an application, arrange the blocks and link them. The combination of blocks creates the application.

Voice recordings

Callers hear voice recordings as they interact with an application. Add voice recordings to an application and associate the recordings with blocks.

Faxes

Faxes are files in the application that callers can select and receive. Usually, a fax has a voice recording, or confirmation prompt, for identification. For example, a recording might say, "ABC Company's profits for last quarter." Add faxes and confirmation prompts to an application and associate the faxes and prompts with blocks.

Call flow

When you look at an application, you see linked blocks. The combined blocks, like a flowchart, show the paths that callers can take through the application. A caller's path is known as the call flow.

How to make applications available to callers

Only applications that are in service are available to callers. Before you can put an application into service, it must be complete. Test a complete application before publishing its telephone number.

To make an application available to callers, follow these steps:

1. Create the application.

2. Ensure all blocks are configured and connected. Pink borders around blocks indicate that they require configuration and connection.

3. Put a complete application into service by adding a telephone number, or service directory number (SDN), for that application to the SDN Table. Until you add an SDN, the application exists only in the system and is not available to callers.

4. After you add an application, test it to verify that it contains no errors.

5. Publish the application's SDN for callers to dial.

See also

For information about blocks, see Chapter 4, "Understanding blocks," and Chapter 5, "Working with blocks."

For information about voice recordings, see Chapter 6, "Working with voice recordings."

For information about faxes, see Chapter 7, "Working with faxes."

For information about the SDN Table and how to give callers access to applications, see Chapter 9, "Putting applications into service."

Application Builder's graphical interface

Introduction

Application Builder's graphical interface can help you to create an application. You can see what the application looks like, and you can drag and drop parts of the application.

Main window

Main window elements help you to create an application. For example, experiment with moving a Menu block to become familiar with the window.
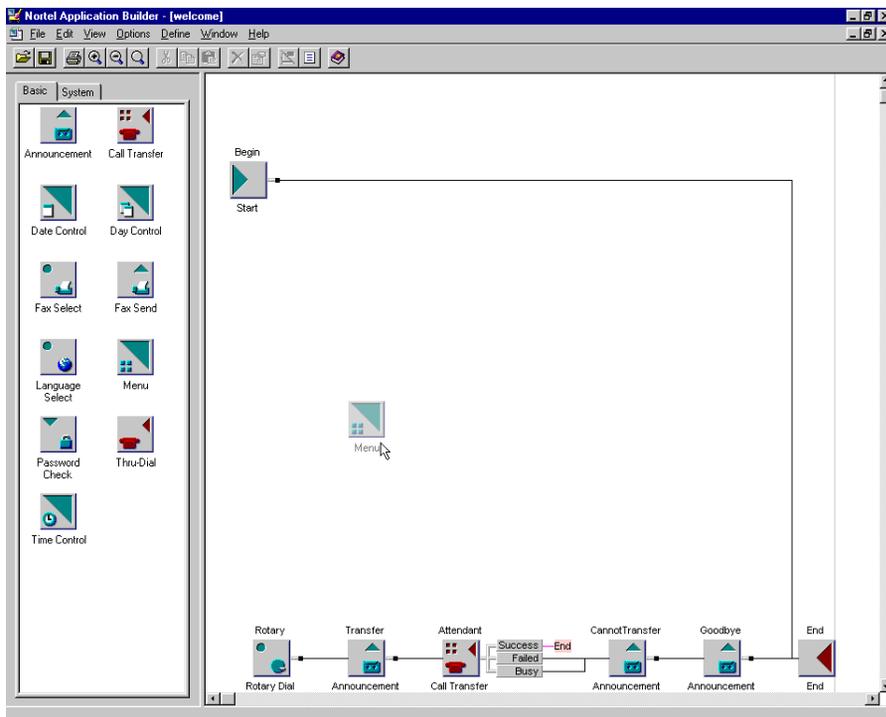
Application

The application window is the large white area that covers most of the main window.

When you create a new application, the application window displays the following default blocks: a Start block, an End block, a Rotary Dial block, a Call Transfer block, and three Announcement blocks. These blocks are always available.

Blocks

Blocks are gray squares that represent functions in an application. For example, the Menu block lets you give callers different options, such as hearing an application in English or French. Add blocks, and then configure and connect them to build an application. Some blocks in the application are already connected.

Palette

The palette is a group of gray blocks in the left pane of the window. From the palette, select blocks and drag them into an application.

Page break

The light gray vertical line on the right side of the window beside the scroll bar indicates where a page break occurs if you print the application.

See also

To learn more about creating applications, see Chapter 2, "Creating applications."

To learn more about the main window and its relation to an application, see Chapter 3, "Working with applications."

Application Builder's tutorial

Introduction

After you finish reading this chapter, try the Application Builder tutorial.

Where the tutorial is located

You can find the tutorial under the Help menu on the CallPilot Administration Client window.

What the tutorial contains

The tutorial provides information, demonstrations, and a practice session to help you learn Application Builder quickly. The tutorial covers these main topics:

- beginning an application
- creating an application
- importing an application
- calling your application

A comparison of Application Builder and Meridian Mail Voice Services

Introduction

Application Builder provides the same functions as Meridian Mail Voice Services, but in a different package. Application Builder also uses different terminology.

Meridian Mail Voice Services

Meridian Mail Voice Services creates services that callers dial. Application Builder creates the applications that callers dial.

Controllers

In Meridian Mail Voice Services, controllers are added to voice services and to functions. In Application Builder, blocks have the same role in applications that controllers provide in Voice Services.

Voice recordings

Meridian Mail Voice Services use two types of voice recordings: prompts and announcements. You can use a prompt only once. However, you can use an announcement as many times as needed.

Application Builder uses two types of voice recordings: system prompts and voice items.

System prompt

A system prompt is any prerecorded voice that comes with the system. "Transferring to an attendant" is an example of a system prompt.

Voice item

A voice item is a custom recording that you or someone else creates. You can use both system prompts and voice items as many times as you want. Therefore, you do not have to rerecord voice items.

VSDN Table

In Meridian Mail Voice Services, callers can dial voice services after you add the services to the Voice Service Directory Number (VSDN) Table. Similarly, callers can dial applications you created in Application Builder and add them to the SDN Table. An application becomes a service only when you add the application to the SDN Table.

See also

For information about blocks, see Chapter 4, "Understanding blocks."

For information about voice recordings and how to migrate Meridian Mail Voice Services to Application Builder, see Chapter 6, "Working with voice recordings."

For information about the SDN Table, see Chapter 9, "Putting applications into service."

Running Application Builder

Introduction

Run Application Builder to create custom applications that also link to system services for both voice and fax capabilities.

Getting there   CallPilot Administration Client > CallPilot System > System Administration

To run Application Builder

Double-click Service Administration, and then double-click Application Builder.

To exit from Application Builder

On the File menu, click Exit.

Showing and hiding parts of the main window

Introduction

When the Application Builder main window appears, all the tools that you need to build that application appear. By hiding some or all of the tools, the application window size increases, making it easier to see the application you are building.

The basic blocks

Here is an example of the palette showing basic blocks.
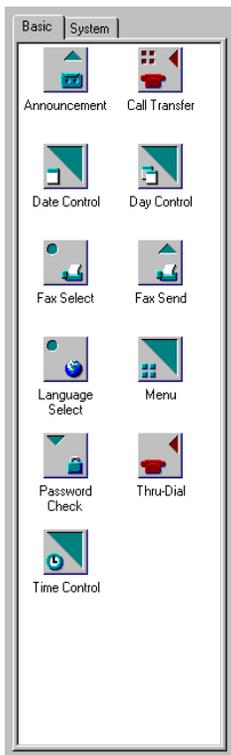
The system blocks

Here is an example of the palette showing system blocks.

Getting there Exploring - CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder

To show the palette

On the View menu, click Palette to make a check mark appear beside your
selection. The Palette window appears on the left side of the main window.

To hide the palette

On the View menu, click Palette to make the check mark beside Palette disappear.

To move the palette from the main window

1 In Application Builder, move the cursor over the border of the palette to make the cursor change to four arrows.

2 Click and, pressing the mouse button, drag the palette away from its default position.

3 Once the palette is moved, release the mouse button.

To return the palette to the main window

Double-click the title bar of the Block Palette pane.

To show the toolbar

On the View menu, click Tool Bar to make a check mark appear beside your selection.

To hide the toolbar

On the View menu, click Tool Bar to make the check mark beside Tool Bar disappear.

To show page breaks in an application window

On the View menu, click Page Grid.

To hide page breaks in an application window

On the View menu, click Page Grid to make the check mark beside Page Grid disappear.

Changing the size of an application window

Introduction

Change the size of an application window to zoom in and out on parts of an application. This way, you can focus on the parts you need to see during creation and maintenance.

Getting there   CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder

To view an application window using the full screen

On the View menu, click Full screen.

To shrink the contents of an application window

On the View menu, click Zoom Out.

To enlarge the contents of an application window

On the View menu, click Zoom In.

To restore the contents of an application window to default size

On the View menu, click Zoom Normal.

To set the zoom magnification for an application window

1   On the View menu, click Set Zoom.

Result: The Set Zoom dialog box appears.
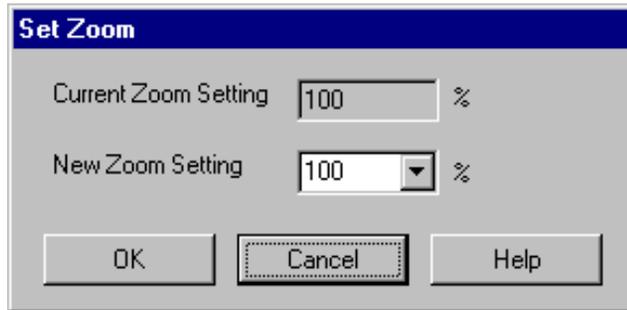
2   In the New Zoom Setting box, type a value between 35 and 100 percent.

3   Click OK to resize the application window and return to the main window.

Arranging application windows

Introduction

Arrange application windows to help you navigate among multiple applications.

Stack or tile application windows to see the contents of more than one application at the same time.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder

To stack application windows in the workspace

On the Window menu, click Tile.

To overlap application windows in the workspace

On the Window menu, click Cascade.

Chapter 2

Creating applications

In this chapter

Section A: What kinds of applications can you create?

In this section

Comparing Meridian Mail Voice Services

Introduction

A menu is one of the most common types of applications. If you are familiar
with using Meridian Mail Voice Services to create menus, note that Application
Builder looks different. Application Builder uses a graphical interface rather
than an interface based on command lines. Application Builder's screens are
different, too.

Meridian Mail Voice Services interface

To create a menu in Meridian Mail Voice Services, use the three parts of the Add
a Voice Menu Definition screen.

```
                        Voice Services Administration
 Add a Voice Menu Definition

 Choice of Menu Actions:
 AS   Announcement Service  CL   Call                 CA   Call Answering
 RV   Call Revert DN        DS   Disconnect           EM   Express Messaging
 FI   Fax Info Service      FIM  Fax Item Maintenance PP   Play Prompt
 PM   Prompt Maintenance    RP   Repeat Menu Choices  MM   Return to Main Menu
 TS   Thru-Dial Service     TD   Time-of-Day Control  TR   Transcription Service
 VF   Voice Forms Service   MS   Voice Menu Service    VM   Voice Messaging

 Voice Menu ID:    _____          Title:   _____

 Revert DN:        _____

 Access Password:  _____  Update Password:   _____

 Greeting Recorded (Voice):   No     Menu Choices Recorded (Voice):  No
 _____
                                                             MORE BELOW
 Select a softkey >

      Save            Cancel                           Voice
```

```
                         Voice Services Administration              MORE ABOVE
Add a Voice Menu Definition

Choice of Menu Actions:
AS   Announcement Service   CL   Call                  CA   Call Answering
RV   Call Revert DN         DS   Disconnect            EM   Express Messaging
FI   Fax Info Service       FIM  Fax Item Maintenance  PP   Play Prompt
PM   Prompt Maintenance     RP   Repeat Menu Choices   MM   Return to Main Menu
TS   Thru-Dial Service      TD   Time-of-Day Control   TR   Transcription Service
VF   Voice Forms Service    MS   Voice Menu Service    VM   Voice Messaging


Silent Disconnect:            No  Yes

      Key         Action                            Comments
       1          ___                               _____
       2          ___                               _____
       3          ___                               _____
       4          ___                               _____
                                                                   MORE BELOW
Select a softkey >

    Save             Cancel                              Voice
```

```
                         Voice Services Administration              MORE ABOVE
Add a Voice Menu Definition

Choice of Menu Actions:
AS   Announcement Service   CL   Call                  CA   Call Answering
RV   Call Revert DN         DS   Disconnect            EM   Express Messaging
FI   Fax Info Service       FIM  Fax Item Maintenance  PP   Play Prompt
PM   Prompt Maintenance     RP   Repeat Menu Choices   MM   Return to Main Menu
TS   Thru-Dial Service      TD   Time-of-Day Control   TR   Transcription Service
VF   Voice Forms Service    MS   Voice Menu Service    VM   Voice Messaging

       4          ___                               _____
       5          ___                               _____
       6          ___                               _____
       7          ___                               _____
       8          ___                               _____
       9          ___                               _____
Initial No Response  RV                             _____
Delayed Response     RP                             _____

Select a softkey >

    Save             Cancel                              Voice
```

Application Builder interface

To create a menu in Application Builder, work in an application window.
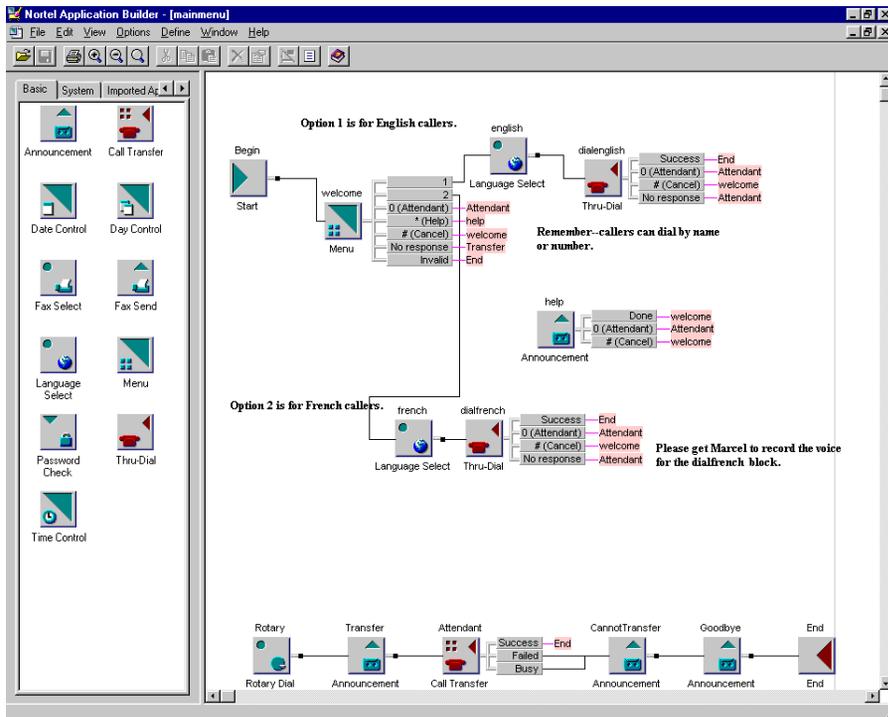
Benefits of Application Builder

Application Builder enables you to do the following tasks:

■   Plan online rather than on paper.

■   Record voice from within an application.

■   See and print the contents of an application.

■   Reuse applications in other applications.

Application scenarios

Introduction

The following scenarios show how you can add functions to an application over time. The scenarios also show various possibilities for creating applications.

In the scenarios, you might notice that some blocks do not appear to connect. Instead, labels appear at the ends of the lines that usually connect blocks. These labels show where blocks connect and are alternatives to connecting lines. Use them to ensure that an application does not look cluttered.

Example: Menu to two departments

You need to set up an application that greets callers and then enables them to transfer to one of two departments: marketing (ext. 7110) or sales (ext. 7120). As well, callers must be able to get a detailed help announcement by pressing * and to transfer to an attendant (ext. 7100) by pressing 0.
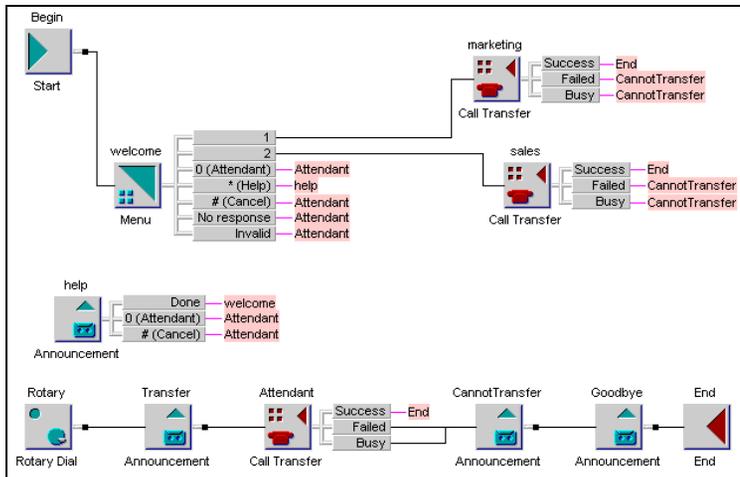
Adding an automated attendant to the menu

After using the application for some time, you decide to make it an auto attendant. As a result, during business hours (Monday to Friday, 9:00 a.m. to 5:00 p.m.), callers can reach any department. During nonbusiness hours, callers can leave a message in a general mailbox (ext. 7500).

From the menu, you enable callers to dial employees. A caller can dial an employee by extension number or by spelling the person's name on the phoneset keypad.
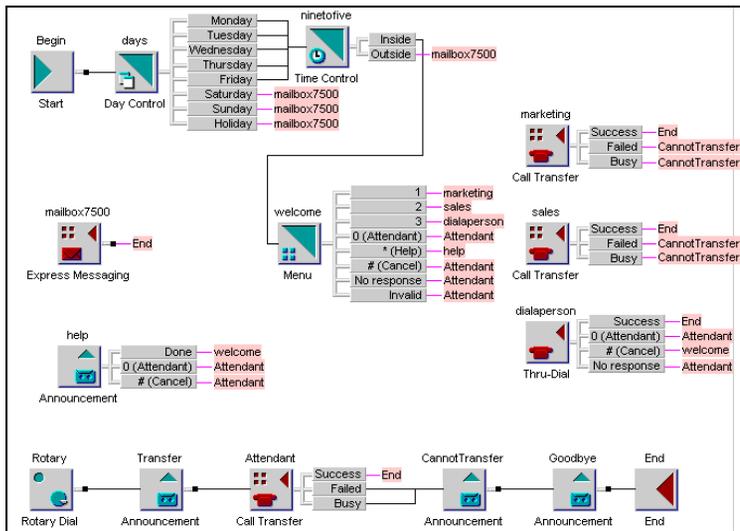
Adding a fax service that is available during business hours

After your boss's request, you add a Fax Select block called "directions" to the application. The fax associated with the block gives directions to the office and is available only during business hours.
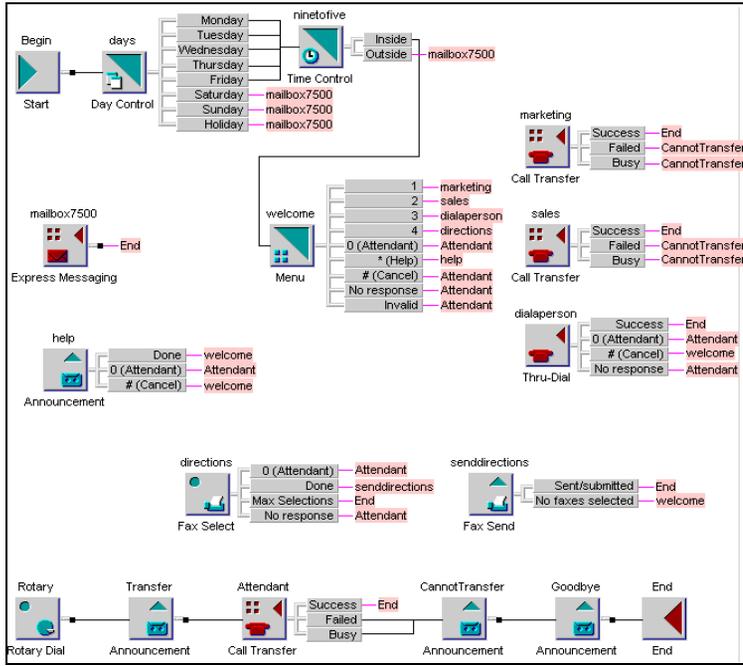
Adding a main menu

Finally, you build another application that is a menu for your company's main phone number. From the menu, callers can choose between hearing options in English or French.

Into this new application you import the menu that you first created and call it "englishmenu." You call the French version of this menu "frenchmenu."
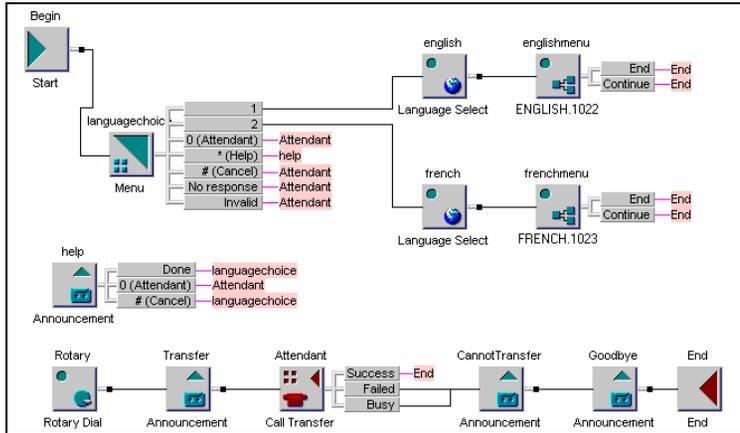
Section B: How to create applications

In this section

Before you create applications

Introduction

Before you begin to create an application, consider both the application's purpose and audience.

Questions to consider

Consider the following questions before you create an application:

- Who will call in to the application?

  Design your application based on the callers to your application. Some callers might access a fax application from a phoneset, while others might call from a faxphone. So, you must configure the most appropriate type of fax delivery in the application's session profile. For information about session profiles, see Chapter 9, "Putting applications into service."

- Will some callers have rotary dial phonesets?

  Callers who have rotary dial phonesets can get lost in applications that require dual-tone multifrequency (DTMF) input. Ensure that these callers can reach a live attendant.

- Will some callers speak a different language?

  Give these callers the opportunity to interact with the application in a different language if multiple languages are installed on your system.

- Do you need a telephone number or SDN for the application?

  For callers to dial an application, it must have an SDN. However, callers do not dial all applications. Callers access imported applications through other applications. Callers never dial imported applications. Imported applications do not require SDNs, but they are part of main applications that do. To identify which applications require SDNs, identify which applications callers dial. For information about SDNs, see Chapter 9, "Putting applications into service."

- Do you have sufficient channels for the applications you want to create?

Applications use channels for processing. You might need more channels for a large number of applications to ensure that calls to the applications are not lost.

- What should you name the application?

  If possible, give your application a meaningful name, especially if you are not the only administrator. Do not give applications names that sound alike. Also, try to include the same prefix in the names of related applications, but try to keep your prefix short so that the rest of the name is easily recognized. For example, you can prefix any accounting department applications with "ac." Then, "acmenu" represents the menu for that department.

What creating applications means

Introduction

You complete six main steps when you create an application. When you create an application, you link all its parts, such as blocks, voice recordings, and faxes.

How you create an application

Each step in application building corresponds to a chapter in this guide. These are the steps:

1. Create an application.

2. Assemble the blocks.

3. Record voice

4. Create faxes.

5. Determine whether you can reuse the application.

6. Put the application into service.

7. Maintain the application.

Create an application

When you create an application, you name it and then save it on the server. Chapter 3, "Working with applications," describes how to name and save files.

Assemble the blocks

Blocks are the content of an application. Before you can place a block in an application, you must understand that block's function. After placing blocks, configure and connect them. Associate voice recordings and faxes with blocks when you configure the blocks.

For information about each block's function, see Chapter 4, "Understanding blocks." To find out how to configure and connect blocks, see Chapter 5, "Working with blocks."

Record voice and create faxes

You can create voice recordings and faxes while the application is open in Application Builder. For information about recording voice, see Chapter 6, "Working with voice recordings." For information about creating faxes, see Chapter 7, "Working with faxes."

Determine whether you can reuse the application

Even before you begin to create an application, consider whether you will want to reuse some of its parts in other applications. Try to allow flexibility for reuse in your application design. For example, you can create an application that exists only for other applications to import.

At other times, consider reusing functions after you create an application. For example, you might need to copy some blocks from one application and paste them into another application.

For information about reusing parts of an application, see Chapter 8, "Reusing existing applications."

Put the application into service

Before you can test an application, you must add it to the SDN Table. To add an application to the table, assign a telephone number or SDN to the application. Then, in the session profile, configure how the application behaves. For example, configure the type of fax delivery that the application uses.

To test an application, dial its SDN and use it as a caller would. After you are satisfied that the application works properly, make it available to callers by publishing its SDN for them to dial.

For information about the SDN Table, the session profile, and testing, see Chapter 9, "Putting applications into service."

Maintain the application

Maintain your applications to ensure they contain up-to-date information. You update applications from either an on-site computer or a remote phoneset. To maintain applications, you must also back up and restore them and print their documents.

For more information, see Chapter 10, "Maintaining applications."

See also

As you assemble blocks and create voice recordings and faxes, consider the guidelines for application building. For more information, see Section C: "Guidelines for creating applications," on page 55.

Section C: Guidelines for creating applications

In this section

Guidelines for applications

Introduction

To create caller-friendly applications, first consider your audience. The following guidelines suggest ways to tailor applications to assist callers.

Identify the application

Include an initial voice recording to identify for callers the application they have called and to advise them of what to expect. Callers then know whether they want to use the application.

For example, a recording can say, "Thank you for calling Goudy's Department Store. Select one of the following options to contact either a department or an employee."

Consider rotary dial callers

Callers who use rotary dial phoneset can get lost in applications that allow only phoneset keypad input. To avoid this problem, provide callers with a way out of all applications. You can direct such callers to a live attendant or, after hours, to a mailbox.

Describe character keys

The character keys on the keypad of a phoneset have various names. Describe these keys accurately and consistently. Also, use the same descriptions as other services.

- Call the * key "the star key," not "asterisk."
- Call the 0 key "the zero key," not "oh."
- Call the # key "the pound key" or "number sign" or whatever term is most common in your country.

Denote keys for responses

Applications often require users to give "yes" or "no" responses. In such applications, be both consistent and conventional. Use 1 to denote Yes and 2 to denote No.

Provide help

Each application should provide callers with help. Give callers access to automated help (a voice recording) or to a live attendant.

Give examples

A description sometimes does not give callers enough information about the information they must enter. When a description is unclear, follow it with a specific example.

For example, suppose that a Thru-Dial block expects callers to enter both an area code and a phone number. The voice recording associated with the block should provide an example of which digits to enter: "Please enter the phone number you want to call, preceded by 1 and the area code. For example, enter 1 4 1 6 5 5 5 1 0 0 0."

Guidelines for menus

Introduction

In applications, you use menus to provide options to callers. When you present options, consider the following guidelines.

Indicate the number of options

Orient callers to a menu to help them know what to listen for and what to expect. The voice recording that introduces a menu should tell callers how many options they are about to hear.

For example, a recording may say, "Welcome to Landon Offices. Please choose one of the following five options."

Give limited options

Callers can recall only a limited amount of information. To prevent overloading, give callers no more than five options at one time.

Present options sequentially

For callers to select one option easily from several choices, make sure menus present options in sequential order.

Callers can easily select a language from the following menu: "For English, press 1; for French, press 2; for Italian, press 3; for Spanish, press 4."

Callers would have difficulty selecting a language from the following menu, especially after hearing all the options: "For English, press 2; for French, press 4; for Italian, press 3; for Spanish, press 1."

Guidelines for voice recordings

Introduction

A caller experiences an application only through its voice recordings. Most often, you lay out your application and associate recordings with blocks. Then, you write and record the voice. During all three stages, consider the following guidelines.

How you put voice in an application

To put voice in an application, you associate it with blocks. When associating a voice recording with an Announcement block, make the recording interruptible unless it gives critical information. Interruptible voice enables experienced callers to go through an application quickly.

How you write voice

When you write voice recordings, pay attention to how you organize their content.

Organize in goal-action sequence

In your voice recordings, identify the result of an action before stating the action. To organize the content of a recording in this way, use the goal-action sequence. For example, a recording says, "To do x, press y now."

Use everyday language

In voice recordings, use the language that callers expect. For example, you can call a telephone a telset, but telset is jargon, and jargon confuses callers. Use everyday, familiar language when you write recordings.

Write in the active voice

When you write voice recordings, use the active voice. A voice recording in active voice is clear: "To reach the Accounting department, press 1."

Passive voice confuses callers because it only implies what they should do: "To reach the Accounting department, the number one key should be pressed."

Make affirmative statements

Write your voice recordings as affirmative statements. Rather than telling callers to do nothing, tell them to do something. For example, "Please stay on the line" is a better voice recording than "Do not hang up."

By telling callers what to do, you ensure that negative conditionals and double negatives do not appear in your voice recordings.

The following recording has a negative conditional: "If you do not want to hear any more information, press 2." The "if" makes the sentence conditional, and the "do not" makes it negative.

Double negatives are grammatically incorrect. "Do not do nothing" is an example of a double negative. However, by "not" doing "nothing," you actually do something.

Give callers useful feedback

Voice recordings should indicate when a selection is incorrect and then list the valid options from which callers can choose.

If callers press an incorrect key, they do not want to hear "error," "invalid response," or "unable to process." None of those recordings indicates what callers should do next.

How you record voice

Consider the following guidelines when you record voice:

Record in a quiet area

When recording a voice, ensure no noise interferes. Turn off any background music. Background noise can interfere with callers' ability to understand the recording.

Use one professional voice

The voice you record projects your organization's identity. Consider whether to use a male or female voice, and whether the voice sounds formal or casual. Use only one voice per application to project consistency.

Record all voice during one session

If possible, record all the voice for an application in one session to sound consistent.

Use the same recording device for the voice. For example, use only the phoneset or the PC microphone.

Guidelines for faxes

Introduction

Callers receive hard-copy information from an application through fax. Therefore, make sure that all faxes are correct and up to date, and that they project your organization's identity. Consider the following guidelines to ensure that faxes include appropriate information.

Include a logo

To help callers recognize and become familiar with your organization, include your logo on a cover page.

Include a cover page

Use a cover page to communicate essential information and company identity. You can send a custom cover page with all fax deliveries. The system sends its own cover page only for callback fax deliveries.

The system defines what information appears on its cover page. However, you can put your organization's logo, address, and phone number on a custom cover page that is included with each fax delivery.

Use the header

The header, or trimtab, of a fax can contain useful information for recipients. For example, the number of the sending fax machine can appear in the header. Recipients can refer to that number if a transmission error occurs.

Leave large margins

Leave larger margins at the top and bottom of fax pages to ensure that information does not get cut off during transmission.

Select an appropriate typeface

Use a typeface that is easy to read. Avoid decorative typefaces. Do not use a font size smaller than nine points.

Check for spelling errors

Spelling errors make your organization appear unprofessional. Do a spell check on all faxes to ensure they do not contain any errors.

See also

For information about fax delivery, see Chapter 7, "Working with faxes."

For information about fax cover pages and session profiles, see Chapter 9, "Putting applications into service."

Chapter 3

Working with applications

In this chapter

Section A: Working with applications

In this section

Using applications

Introduction

When you begin an application, you complete three main steps: you create it, you save it, and you close it.

In Application Builder, when you open an application, you also lock it so that no other client can access it. This is different from other parts of CallPilot, which allow access by more than one administrator at a time. In Application Builder, you must close an application before others can use it.

You must know how to restore applications if your client PC or the server crashes. You should also know how to delete applications from the server.

Creating, saving, and closing applications

Introduction

After you create and work with an application, you must save it. When you save an application, the application transfers from your client PC to the server. A saved application is different from a complete application. To complete an application, you must connect and configure all its blocks. Only complete applications are accessible to callers.

Note: After you save a complete application, install it in the SDN Table. Then, callers can dial the application.

Identifying applications

When you create an application, you give its file both a name and an ID.

File name
The file name identifies an application by a unique word of up to 60 characters.

Example: mainmenu

Application ID
The application ID identifies an application by a unique number ranging from 1000–49 999. This ID enables you to identify an application on your phoneset's keypad when using Voice Item Maintenance or Fax Item Maintenance.

Example: 1001
When you create an application, Application Builder assigns it the next available ID. If you want, you can assign another available ID.

Applications on the server

All applications are kept on the server. However, you use a client PC to work on an application. When you save an application, it transfers from the client PC to the server.

Definition: Complete application

An application is complete only when you have connected and configured all of its blocks (saving an application does not ensure it is complete), and no pink border appears around any block. Only complete applications can be made available to callers.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder

To create an application

1 On the File menu, click New.

Result: The New dialog box appears.
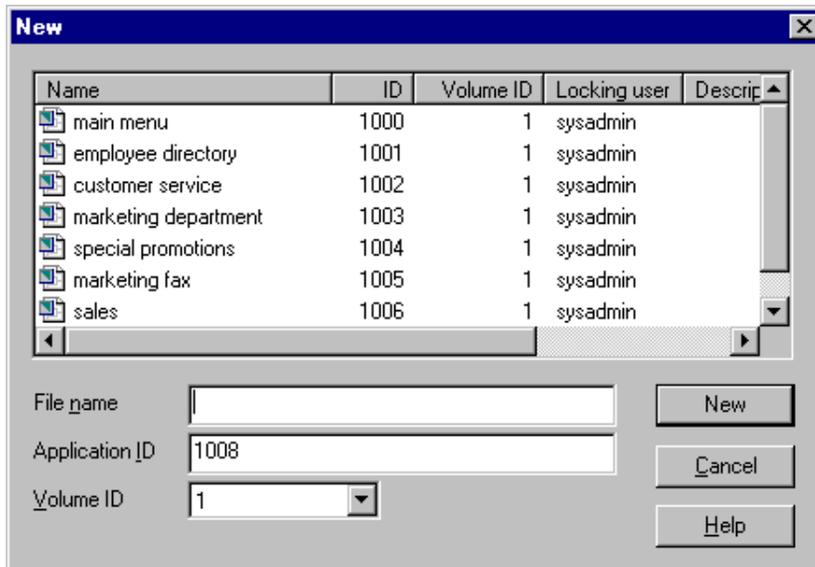
2 In the File name box, type a unique name that identifies the application.

3 In the Application ID box, type a unique number that identifies the application.

4 From the Volume ID list, select the area of the hard drive on which you want the application to reside.

5 Click New to create an empty application and return to the main window.

To save an application

On the File menu, click Save.

To close an application

Close an application after you have finished changing it or looking at its configuration.

On the File menu, click Close.

To unlock an application

When you close an application, it unlocks so that others can access and make changes to it. You can unlock an application only from the computer or client used to open that application.

On the File menu, click Close.

See also

For information about each block, see Chapter 4, "Understanding blocks."

For information about how to use blocks, see Chapter 5, "Working with blocks."

For information about how callers begin to access your applications, see Chapter 9, "Putting applications into service."

Opening applications

Introduction

Open an application to look at it, work with it, or change its configuration. When you open an application, you lock it. This prevents other administrators from accessing and making changes to it.

Where to open an application

All applications reside on the server. You can open them from a client PC.

What happens when you open an application

When you open or close an application, you cause it to become, respectively, locked and unlocked. Only one client PC at a time can open or use a locked application. When you close the application, the server unlocks it for others to access.

What an open application looks like

Two terms describe an open application:

- application window
- call flow
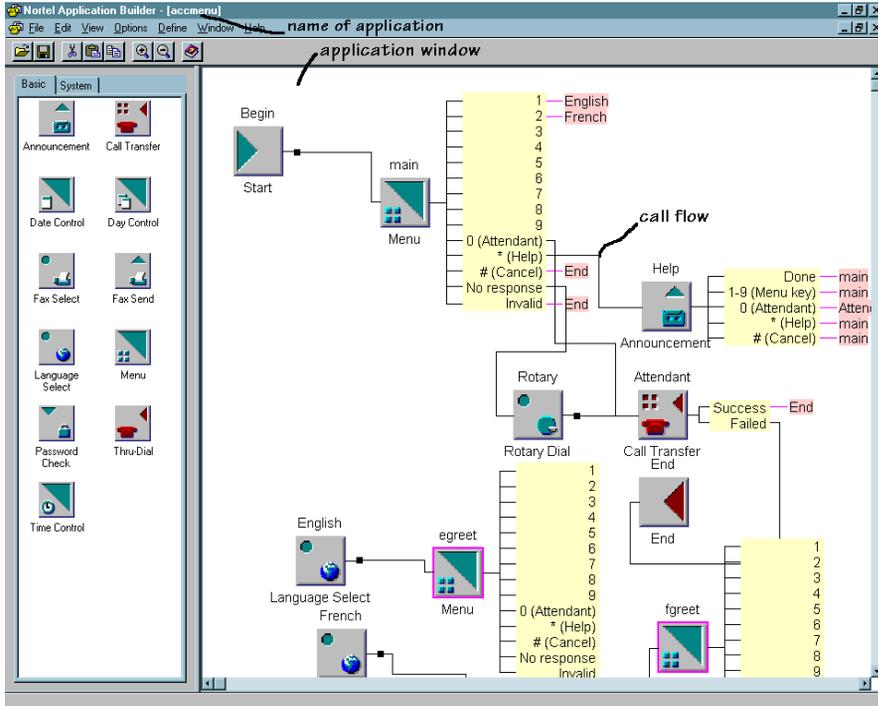
Application window

When an application opens, it appears in the application window.

Call flow

The application window shows the contents of one application. When you look at an application, you see linked blocks. Like a flowchart, the linked blocks show the paths that a caller can take through the application. A caller's path is known as the call flow.

Getting there CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder

To open an application

1 On the File menu, click Open.

Result: The Open dialog box appears.

Open				✕
Name	ID	Volume ID	Locking user	Descrip
main menu	1000	1	sysadmin	
employee directory	1001	1	sysadmin	
customer service	1002	1	sysadmin	
marketing department	1003	1	sysadmin	
special promotions	1004	1	sysadmin	
marketing fax	1005	1	sysadmin	
sales	1006	1	sysadmin	

File name [   ]   Open   Cancel   Help
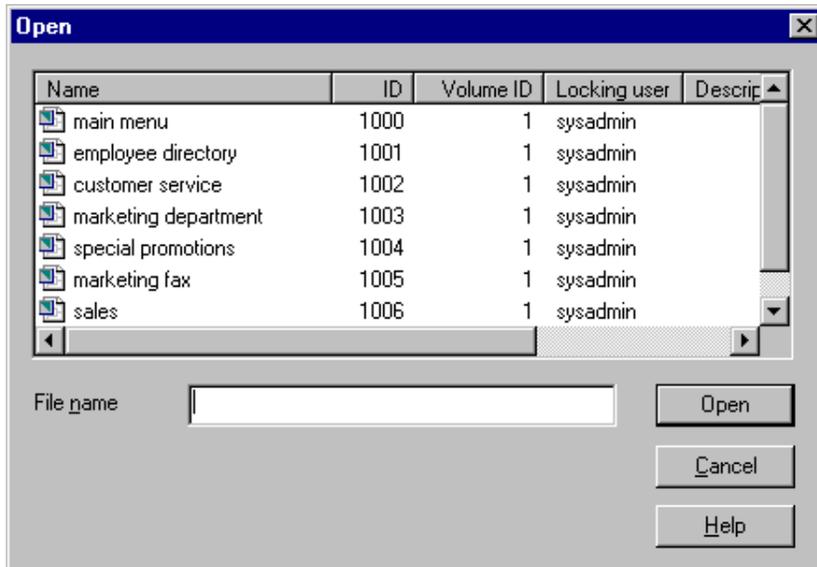
2 Select the file you want to open.

3 Click Open to open the file in the workspace and to return to the main
window.

Restoring applications

Introduction

Temporary applications are left on the client PC if either the PC or the server crashes. After you recover from the crash, you cannot use those temporary applications. To use them again, you must restore them on the server.

Effect of a computer crash

All applications reside on the server. From client PCs, you can open and edit the applications. If a client or the server crashes while you are working on an application, you lose the connection to the server. A temporary version of the application remains on the client PC. No one else can open that application, because it is considered locked by that client.

How to restore an application

After you recover from the crash, open Application Builder from the client on which you were working before the crash. As Application Builder opens, it prompts you to restore the application.

Immediately after the application opens, save it. This transfers the application's information to the server and deletes the temporary version that was placed on the client during the crash.

Deleting applications

Introduction

Delete an application to permanently remove it and its data (for example, voice items) from the server. You cannot delete a locked application or an exported application that is in use by other applications. Also, you cannot delete an application that is assigned to an SDN.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder

To delete an application

1   On the File menu, click Delete.

     Result: The Delete dialog box appears.
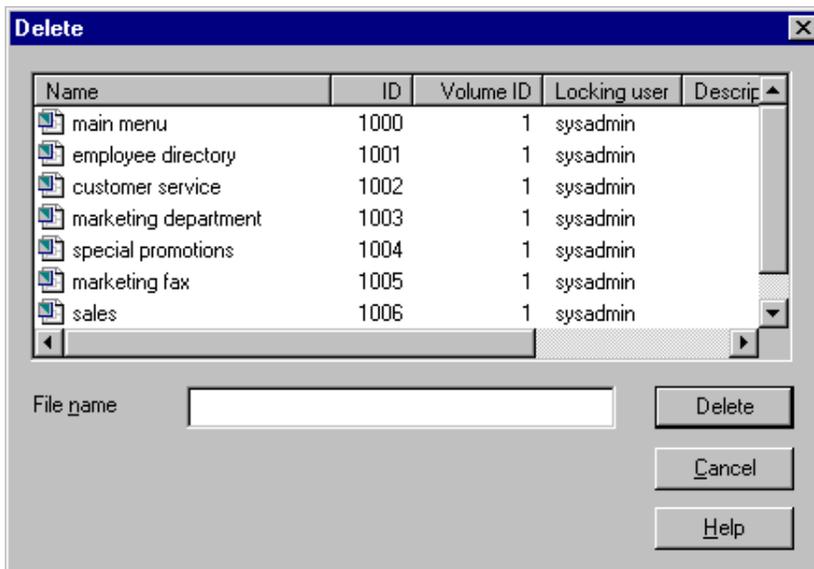
2   Select the name of the application you want to delete.

3   Click Delete to delete the application and return to the main window.

Section B: Working with text notes

In this section

Working with text notes

Introduction

Text notes enable you to include information about parts of an application. These notes appear as annotations in an application window and communicate useful information about applications and their parts.

After you create text notes, you can edit, move, and resize them. You can also change their appearance.

Benefits of text notes

Text notes enable you to do the following tasks:

■ Communicate easily with others about an application.

■ Recall readily the purpose of blocks and their arrangement.

■ Understand quickly an application's call flow.
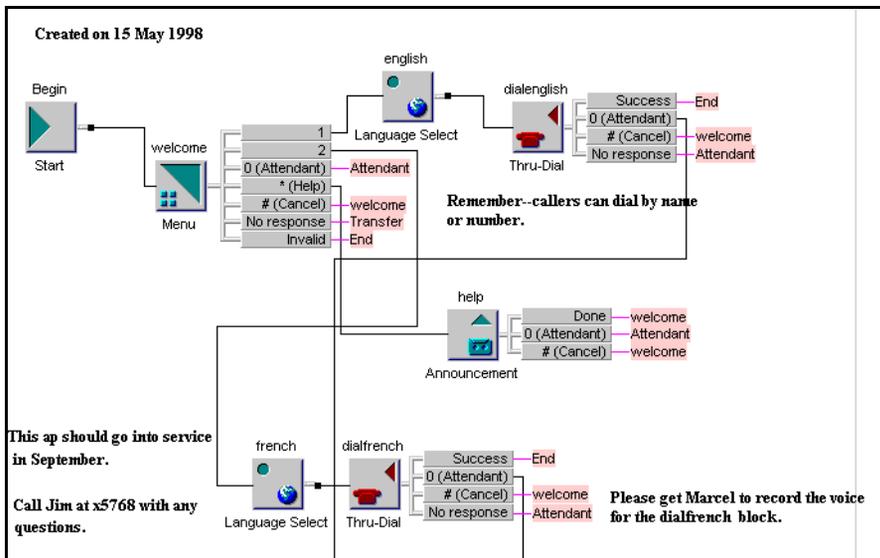
Communicate about applications

You can leave a note to another administrator about changes or problems in an application. You can create a text note to ensure the correct person gets the information.

Besides communicating specific details about an application, text notes provide general information, allowing you to share tasks with other administrators.

Recall block functionality

Text notes clarify why blocks appear in an application and the reason for their placement.

Understand call flow

As you create applications, application windows can become cluttered. Sometimes the clutter can prevent you from seeing an application's call flow. Text notes explain both the callers' path through an application and why they take that path.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window

To create a text note in an application window

1   On the Edit menu, click Create Text Note.

2   Position the pointer (+) where you want the text note to appear.

3   Click and, keeping the mouse button pressed, drag the pointer to make a rectangle.

4   Release the mouse button.

5   Type the text of the note.

6   Click anywhere outside the note to finish creating it.

To edit a text note

1   Double-click inside the text note you want to change.

2   Edit the text.

3   Click anywhere outside the note to finish editing it.

To change the appearance of a text note

1   Click inside the text note you want to change.

2   On the Edit menu, click Change Text Note Font.

3   From the Font list, select a new font for the text note.

4   From the Size list, select a new size for the text note.

5   When you are finished changing the text note, click OK to return to the main window.

Tip: You can change the appearance of multiple text notes by holding down the Shift key, clicking each note, and then following steps 2 through 5.

To resize a text note

1   Double-click the text note you want to resize.

2   Place the pointer on one side of the box.

3   Drag the side to resize the box.

4   Click anywhere outside the note to finish resizing it.

To move a text note

1   Click a text note and keep the mouse button pressed.

2   Drag the text note to its new location.

3   Release the mouse button.

4   Click anywhere outside the note to finish moving it.

To delete a text note

1   Click a text note.

2   On the Edit menu, click Delete.

To change the default appearance of text notes

1   On the Options menu, click Set Default Text Note Font.

2   From the Font list, select a font for the text note.

3   From the Size list, select a size for the text note.

4   Click OK to change the default text note font and size.

See also

By checking and printing application text notes, you can share information with other administrators. For information, see Chapter 10, "Maintaining applications."

Chapter 4

Understanding blocks

In this chapter

Section A: Introduction to blocks

In this section

What are blocks?

Definition

A block provides a specific function in an application. For example, the Announcement block gives you the primary way to play voice. A block appears as a gray square with an icon that suggests the block's function.

Announcement

Block palette

In Application Builder, most blocks appear on the left side of the window in an area called the palette. Other blocks appear in applications.
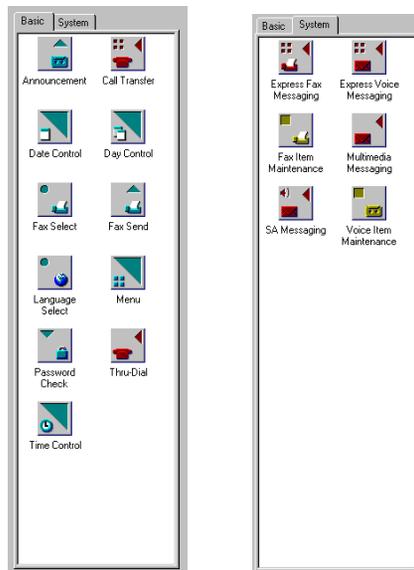
The palette has one tab for each block type: basic, system, and imported application. The third tab appears only in an application that has imported another application. To see a type of block, click the corresponding tab.

Some blocks do not appear in the palette because they apply either to all applications or to only a few. Instead, these blocks appear in applications immediately after you create or export them. For example, the Start and End blocks must be part of every application and, therefore, appear automatically when you create an application. Another block, the Continue block, appears in an application only when you export it.

Types of blocks

Introduction

By adding blocks to an application, you add to its functionality. Blocks help you to create complex applications, link to existing applications on the system, and reuse functionality.

Three types of blocks

Choose blocks that add the functions you need to your application. Application Builder gives you three different types of blocks:

- basic
- system
- imported application

Basic blocks

Basic blocks provide general functionality, such as call transfer. For each application, you customize the basic blocks. In the case of a call transfer, you specify the number to which the system redirects calls.

Another example is provided by the Menu block. This block enables you to give callers options that correspond to the keys on a phoneset. For each key, configure the specific action. For example, the number 1 key might enable callers to dial the extension of their choice.

Menu

System blocks

System blocks represent system applications that have already been created. These applications are known as services. Use these blocks to link your applications to services.

For example, the Express Voice Messaging block transfers callers to the Express Voice Messaging service and enables them to leave a voice message in a mailbox.

Imported application blocks

Imported application blocks enable you to place applications within other applications.

For example, suppose that you create a simple application that has an announcement and a menu. While creating another application, you realize you need to use the same announcement and menu. Instead of re-creating them, you simply import that application into the current one.
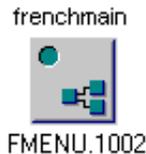
Parts of blocks

Introduction

When you work with blocks to build an application, you are reminded visually of the configuration status of each block and the connection options available.

Two parts of a block

A block looks different in an application from the way it looks in the palette. Once added to an application, a block acquires two parts:

- a pink border
- one or more outputs
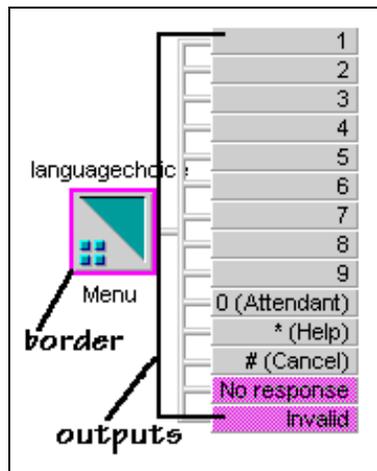
Pink border
A pink border appears around each block and indicates that you must connect or configure it. As soon as you connect or configure the block, the border disappears. The border shows you that an application is incomplete.

Output
One or more outputs appear on the right side of each block. Some outputs are text labels. Others are lines with a solid square at the end. Use an output to connect one block to another one.

About connecting and configuring blocks

To work with blocks, connect and configure them. While you need to connect all blocks, you only need to configure certain blocks.

Connecting

To connect blocks, attach the output of one block to another block's input.

A line appears between the blocks and joins them by connecting their output. In this way, a line from an output shows which block callers go to next in an application.

Configuring

To configure a block, open it, define its parameters, and associate its voice recordings and faxes.

See also

For information about connecting and configuring blocks, see Chapter 5, "Working with blocks."

Section B: Basic blocks

In this section

Announcement block

Purpose

The Announcement block provides the primary way to play a voice recording in an application.

Announcement

Example

A company uses the Announcement block in an application to give callers information. For example, an announcement tells callers who won prizes in the company lottery.

Setup

You must configure and connect the Announcement block.

Configuring

When you configure the Announcement block, do the following tasks:

- Choose the announcement.

- Determine how many times the announcement plays.

- Define which phoneset keys can interrupt the announcement and whether those keys should be buffered.

Connecting

When you connect the Announcement block, you direct callers to their options after they listen to or interrupt the announcement.

Voice recordings

To create an announcement, choose between two types of voice recordings:

- system prompt
- voice item

As their name suggests, system prompts exist on the system. They are already recorded and are ready to use. Voice items are custom recordings that you create to meet the needs of your organization.

Available system prompts

If you choose to use a system prompt as the announcement, you can select from one of the following prompts:

How prompt appears in Application Builder	Actual content of prompt
For more information, press star	For more information, press star.
Transferring to an attendant	Transferring to an attendant. One moment please.
For help, press star	For help, press star.
Please try again	Please try again.
<beep>	<<Beep>>
Please contact your administrator	Please contact your administrator.
<beep> No operator is available	<<Beep>> No operator is available.
<beep> That number is busy, try later	<<Beep>> That number is busy. Please try again later.
<beep> Number cannot be reached	<<Beep>> That number cannot be reached from this service. Please try again.

How prompt appears in Application Builder	Actual content of prompt
<beep> Your call cannot be completed	<<Beep>> Your call cannot be completed at this time. Please try again later.
<beep> Selection not recognized	<<Beep>> That selection is not recognized.
<beep> Please make another choice	<<Beep>> That selection is not recognized. Please make another choice.
<beep> Invalid password	<<Beep>> That password is incorrect. Please contact your administrator for assistance.
<beep> Invalid password, try again	<<Beep>> That password is incorrect. Please try again.
<beep> Invalid password, transferring	<<Beep>> That password is incorrect. Transferring to an attendant; one moment please.
Maximum fax selections reached	You have reached the maximum number of selections that may be made in one call. If you would like to make additional selections, please call again.
Goodbye	Goodbye. **Note:** You can customize, or edit, the "Goodbye" system prompt by using System Prompt Customization.

Which phoneset keys interrupt an announcement

By default, callers can interrupt an announcement by pressing certain keys on their phoneset. Determine these keys when you configure key handling options for an Announcement block. Make sure the appropriate boxes are checked for the keys that should interrupt the announcement.

Key buffering

Key buffering means phoneset menu keys can both

- interrupt an announcement

- act as input for both the Announcement block and the next block, unless the next block is another Announcement block

Menu keys and key buffering

Menu keys are the keys labeled 1–9 on your phoneset. If you configure that callers can interrupt an announcement by pressing menu keys, you can also configure key buffering for them. Key buffering affects the block that comes after an Announcement block, unless the next block is another Announcement block.

Key buffering and Announcement blocks

An Announcement block always stops the key buffering initiated by a preceding Announcement block. For example, two Announcement blocks are joined together. Both of them can be interrupted by menu keys and have key buffering configured. A caller can interrupt the first announcement and then be taken to the second announcement. The caller must start listening to the second announcement before being able to interrupt it.

Pause before exiting

You can configure that a silent pause follows the last play of the announcement before taking callers to the next block. Set the duration of the pause, known as the command-entry time out, in the Messaging Administration program. Make sure you use the pause only to give callers time to give input or to write down information. Otherwise, the pause can frustrate callers.

Relationship to other blocks

The Announcement block can affect all blocks that follow it and require menu key input. For information about the blocks and key buffering, see "How the Announcement block works with blocks that require menu key input" on page 166.

As well, combining the Announcement block with certain other blocks adds to the number of functions available through an application. See "How the Announcement, Menu, and Thru-Dial blocks work together" on page 169.

Caller interaction

An announcement may let callers interrupt it. As well, the key that does the interrupting may be key buffered.

Voice recording plays for the specified number of times.

Caller interrupts the recording? (optional) — **YES** → Which key did the caller press?

NO

Pause before exiting? — **YES** → Wait for pause.

NO

Next block.

Attendant, cancel, or help key.

Menu key.

Key buffering? — **NO** → Next block.

YES

According to the menu key, caller exits the Announcement block and the key is applied to the next block.
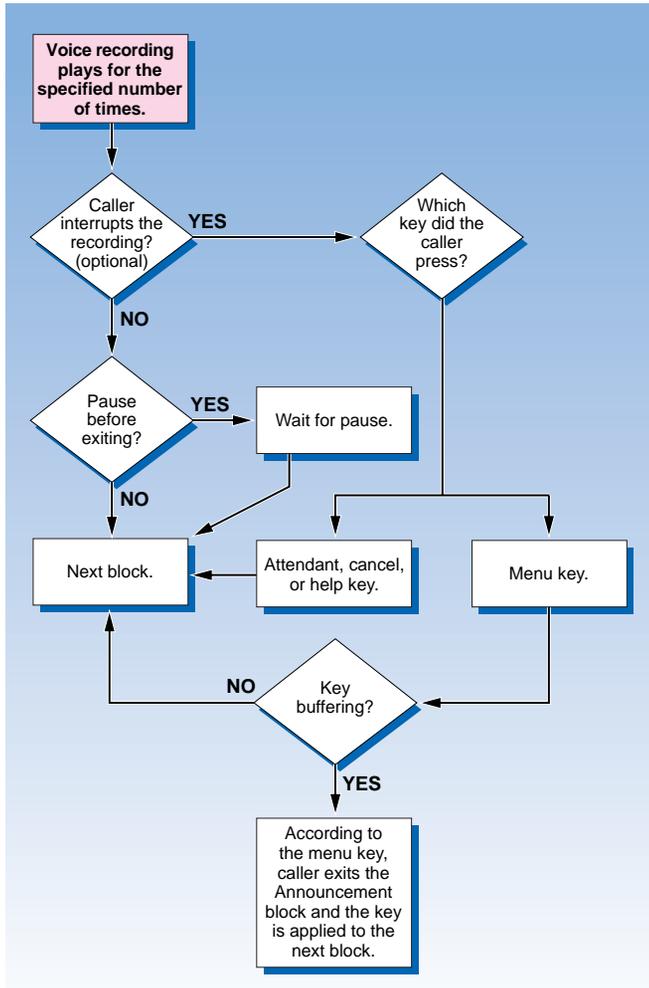
See also

For information about system prompts, customized system prompts, and voice items, see Chapter 6, "Working with voice recordings."

For information about key buffering and its effect on an application, see "How the Announcement block works with blocks that require menu key input" on page 166.

Call Transfer block

Purpose

The Call Transfer block transfers callers to the default attendant or to an extension of your choice.

Call Transfer

Example

An application for the help desk of a software company uses the Call Transfer block to transfer callers to a particular member of the support staff.

Setup

You must configure and connect the Call Transfer block.

Configuring

To configure the Call Transfer block, select an optional greeting and specify the number to which callers transfer.

Connecting

To connect the Call Transfer block, designate where callers go if the system does not transfer them successfully.

Default fax delivery

If any faxes have not been delivered by the system, default fax delivery occurs when an application encounters this block.

Where to transfer callers

You can transfer callers to

- the default attendant
- a specific extension

Default attendant
If you transfer callers to the default attendant, the system transfers them to the attendant defined in the Messaging Administration program.

Specific extension
If you transfer callers to a specific extension, you enter its number in the appropriate box. Ensure the extension exists on the system.

Caller interaction

Unless a call transfers unsuccessfully, callers pass through the Call Transfer block quickly.
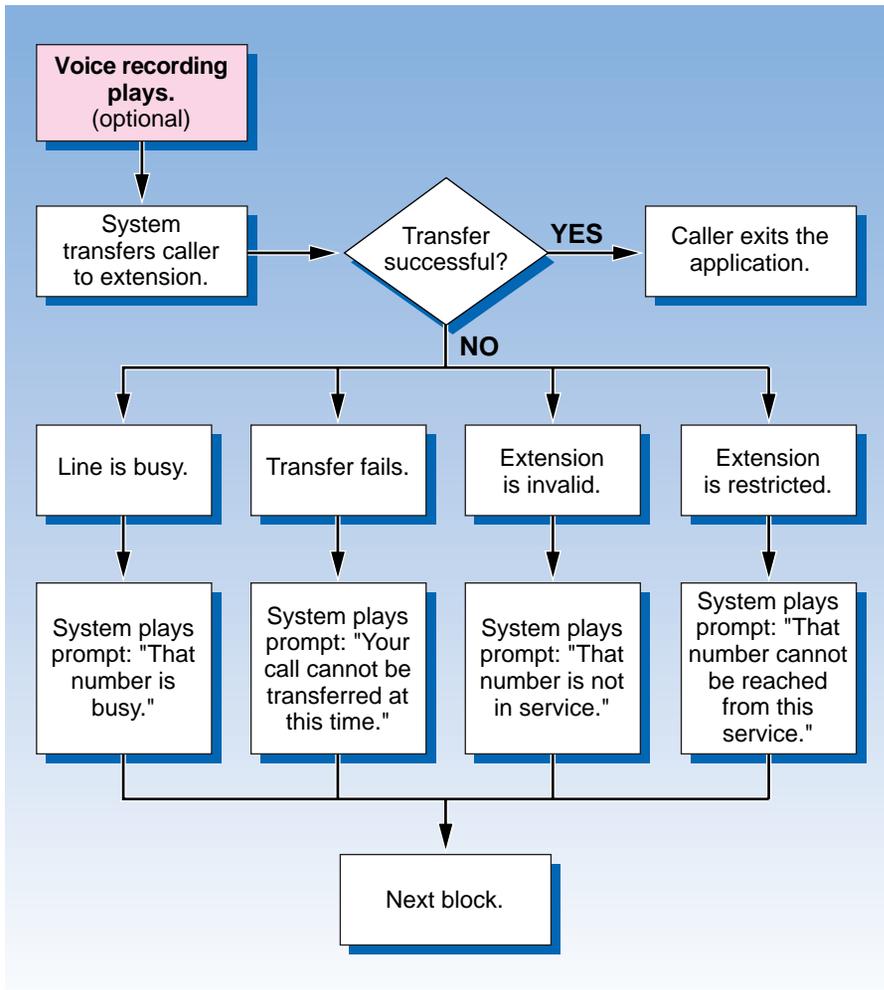
See also

For information about default delivery, see "Fax Select block" on page 110.

For information about system prompts and voice items, see Chapter 6, "Working with voice recordings."

To configure the Call Transfer block, see "Configuring the Call Transfer block" on page 207.

Date Control block

Purpose

The Date Control block routes callers to different blocks in an application depending on the date.

Date Control

Example

A university uses the Date Control block in an application to activate certain functions only during registration week.

Setup

You must configure and connect the Date Control block.

Configuring

To configure the Date Control block, define the date period.

Connecting

To connect the Date Control block, direct where callers go in the application, depending on the date.

Definition: Date period

A date period defines the calendar days during which the application routes callers to a specific part of an application. Up to five subperiods make up one date period.

Date subperiods

A subperiod defines one of the five separate date ranges that make up one date period. Each subperiod consists of both a start date and an end date specified by months and days. For example, a university could define three date subperiods, one per session, for registration:

- 01/03 to 01/06 for the winter session

- 05/02 to 05/05 for the spring session

- 09/06 to 09/09 for the autumn session

Inside and outside a date period

When callers access an application, the system compares the current date with the date in each subperiod. If the current date falls on any date within one of the subperiods, then callers access the application inside the date period. If callers access an application on a date not included in any date subperiod, then they access the application outside the date period. Calling inside or outside a date period determines which part of an application callers access.

How to configure a date period

When configuring a date period, you can overlap subperiods, span two years, and define one-day periods.

Overlapped subperiods

You can overlap the dates specified in subperiods. The block follows the same simple rule: if the current date falls into any one of the specified date subperiods, the date is considered within the date period. Callers exit from the block according to the block's output.

Later begin date than end date

For any subperiod, if the begin date is later than the end date, the block assumes the date range wraps from one year into the next. For example, if a date range specifies 22/12 to 3/1, the block checks if the current date falls between December 22 and December 31 inclusive or between January 1 and January 3 inclusive. If the date falls within one of those ranges, callers exit the block according to the Inside output.

Same begin date and end date

If the begin date and end date are the same for any subperiod, that subperiod is considered one day.

Relationship to other blocks

You can combine the Date Control with other blocks to define a more specific time. For more information, see "How the Time Control, Day Control, and Date Control blocks work together" on page 176.

Caller interaction

Callers do not interact with the Date Control block. However, the block affects callers because the application routes calls differently on different dates.

See also

To configure the Date Control block, see "Configuring the Date Control, Day Control, and Time Control blocks" on page 210.

Day Control block

Purpose

The Day Control block routes callers to different blocks in an application based on the day of the week or whether the day is a holiday.

Day Control

Example

A bank uses the Day Control block in an application to play a menu that directs callers to different departments on Mondays through Fridays. On Saturdays, Sundays, and holidays, a greeting about the bank's hours of operation plays instead.

Setup

You must configure and connect the Day Control block.

Configuring
To configure the Day Control block, indicate whether the day of the week should be checked against a holiday schedule.

Connecting
To connect the Day Control block, direct where callers go in the application, depending on whether it is a weekday or a holiday.

Holidays and weekdays

To configure the Day Control block properly, you must understand where holidays are defined and how those holidays affect regular weekdays.

Where holidays are defined

If you configure the Day Control block to look for holidays, then it checks the holiday schedule defined in the Messaging Administration program. In that program, an administrator defines which days of the year are considered holidays.

How holidays affect weekdays

A holiday takes precedence over any day of the week. For example, you configure an application's Day Control block to check for holidays. Callers call that application on Tuesday, January 1. Because it is New Year's Day and a holiday, callers experience a different application than they would if they called on a Tuesday that was not a holiday.

Why the Holiday output disappears

If you configure the Day Control block to not look for holidays in the holiday schedule of Messaging Administration, then the block's Holiday output disappears.

Relationship to other blocks

You can combine the Day Control block with other blocks to define a more specific time. For more information, see "How the Time Control, Day Control, and Date Control blocks work together" on page 176.

Caller interaction

Callers do not interact with the Day Control block. However, the block affects callers because the application routes calls differently on different days.

See also

To configure the Day Control block, see "Configuring the Date Control, Day Control, and Time Control blocks" on page 210.

End block

Purpose

The End block terminates an application. It either

- disconnects callers from an application

  or

- transfers callers to a service

To transfer callers from an application to a service, the End block must terminate the application.

All system blocks (such as Express Voice Messaging) and some basic blocks (such as Call Transfer and Thru-Dial) connect to the End block. By default, these blocks can connect only to the End block. For these blocks, the End block transfers callers to the services they represent.

However, if a block's connection to the End block is not by default or configured by you or another administrator, then the End block disconnects callers.

End

Setup

You do not configure the End block. Because it is the last block in an application, you do not have to connect it to another block.

You cannot cut, copy, rename, or delete the End block. It appears only in each application's window and not in the palette with the rest of the blocks. As well, the End block can appear only once in an application.

Default fax delivery

If any faxes have not been delivered by the system, default fax delivery occurs when an application encounters the End block.

Relationship to other blocks

You can place an Announcement block before the End block to warn callers that the application is about to terminate.

The End block works with all the system blocks. See "How the End block works with all system blocks" on page 179.

Caller interaction

Callers are unaware of the End block because they do not interact with it.

If no faxes are waiting to be delivered, the system disconnects the call or transfers callers when it reaches this block. If faxes are waiting to be delivered, the system invokes the default delivery process. For information about default delivery, see "Fax Select block" on page 110.

Fax Select block

Purpose

The Fax Select block has an associated fax that a caller can select for same-call or callback delivery.

Fax Select

Example

A factory outlet store uses the Fax Select block in an application to provide callers with a map that gives directions to the store.

Setup

You must configure and connect the Fax Select block.

Configuring

To configure the Fax Select block, associate a fax item with it.

Connecting

To connect the Fax Select block, direct where callers go in the application after they select the fax or if they reach the maximum number of fax selections.

Definition: Fax item

A fax item contains both a fax and a confirmation prompt.

Fax

A fax must be in tagged image file format, class F (TIFF-F). You can save files in TIFF-F by using Nortel Fax, fax viewing software, and graphics software. When saving files in TIFF, be aware of its subtypes (for example, class F). Not all subtypes of TIFF are fax-compatible. All TIFF files (regardless of subtype) have a TIF extension (for example, routes.tif).

Confirmation prompt

A confirmation prompt is a voice recording that gives information about a fax (for example, "Recreational cycling routes for the Greater Metropolitan Area"). This prompt can also be recorded via the phoneset. A confirmation prompt must be in WAV format, even when it is imported. Prompts in the appropriate format have a WAV extension (for example, cycle.wav).

Associating fax items

You can associate only one fax item with a Fax Select block. However, you can include more than one fax item in an application.

Multiple fax items

To put more than one fax item in an application, use multiple Fax Select blocks.

How the session profile affects fax items

To include fax items in an application, define the application's fax options in the session profile of the SDN Table. In the session profile, establish settings for all fax applications and other settings that are specific to fax applications that use callback delivery.

For all fax applications

In the session profile, establish the following settings for all fax applications:

- the maximum number of faxes a caller can select during one call
- the maximum number of fax pages that the system delivers to a caller during one call
- the phoneset number of the fax machine that the system uses to send faxes
- the fax delivery method (callback, same-call, caller's choice)

- whether a custom cover page, called a sponsor fax item, transmits with each fax

- how page transmission errors are handled

For fax applications that use callback delivery
In the session profile, also establish the following settings for fax applications that use callback delivery:

- the DN to which fax callback transmissions are billed

- whether the system cover page transmits with each fax

- the extension number of the fax recipient

- the type (for example, national) of fax machine number for which the system must prompt callers so it knows where to deliver faxes

- the restriction/permission list (RPL) against which the fax machine number must be validated before the system can make a fax callback transmission

Note: If a service includes Fax Select blocks and callback delivery is allowed, then the settings on the General tab for the service override the channel allocations set in the SDN Table for the service.

How an application delivers faxes

To ensure that the system sends faxes to callers according to the type of fax delivery specified in the session profile, you either

- include the Fax Send block

- use default delivery

Including the Fax Send block
Place and configure the Fax Send block after the Fax Select block. This is the best method to ensure faxes get delivered.

Using default delivery
Default delivery occurs in an application if faxes are selected and one of the following events occur:

- a caller hangs up

- an error occurs in the application

■   a caller reaches a Thru-Dial, system, Call Transfer, or End block before the
Fax Send block

Example

Suppose that you have an announcement that says, "Thank you for calling.
Goodbye." This announcement precedes the End block. If callers have selected
faxes and there is no Fax Send block, then the End block activates default
delivery. As a result, after the "goodbye" message, the system asks callers
whether they want their selected faxes delivered.

After callers have heard "goodbye," they should not be prompted about delivery.
This sample application makes more sense to a caller if it does not depend on
default delivery. To correct the problem, place a Fax Send block before the
Announcement and End blocks.

What happens when callers press certain keys

To configure the Fax Select block appropriately, consider its relationship to the
Cancel (#) key and the system prompts that play as a result of callers' selections.
Different prompts play during fax selection or when the application must verify
fax delivery, which is configured in the session profile.

The Cancel key

The Fax Select block does not support the Cancel (#) key. Callers can exit the
block only by selecting the fax, pressing (0) for an attendant, timing out on some
entry, or exiting on some error condition (for example, the fax is already
selected).

If callers press the Cancel key for the Fax Select block, the previous prompt
replays. However, if callers press the Cancel key while entering an extension
number for callback delivery, this indicates that they do not want an extension
number to print on the system cover page.

Delayed prompts

If callers fail to respond when requested to enter an extension number, the
system does not play prompts. Instead, the system assumes callers do not want
to enter an extension number and plays the next prompt.

The Attendant key

When you configure the Fax Select block, you define whether callers can transfer to an attendant by pressing the attendant (0) key during the confirmation prompt for the fax item or one of the menu prompts for the block. When you enable or disable an attendant, you affect the system prompts that callers hear.

If you enable an attendant, the "Press 0 for an attendant" system prompt plays when callers do not give a response or press the Help (*) key. If callers press the Attendant key, they leave the Fax Select block on the Attendant output.

If you disable an attendant, the "Press 0 for an attendant" system prompt does not play at any time. Instead, when callers press 0, the following system prompt plays: "That selection is not recognized."

Relationship to other blocks

Use the Fax Select block with the Fax Send block. For information, see "How the Fax Select and Fax Send blocks work together" on page 173.

You can use the Fax Select block with the Menu block. For example, you can attach a Menu block to the Done output of Fax Select. Then, you can give callers one of the following choices:

- Select another fax by pressing 1.
- Receive the current fax by pressing 2. When callers press 2, they reach the Fax Send block.

Caller interaction

After callers select a fax, their fax limit and fax delivery setup is checked.
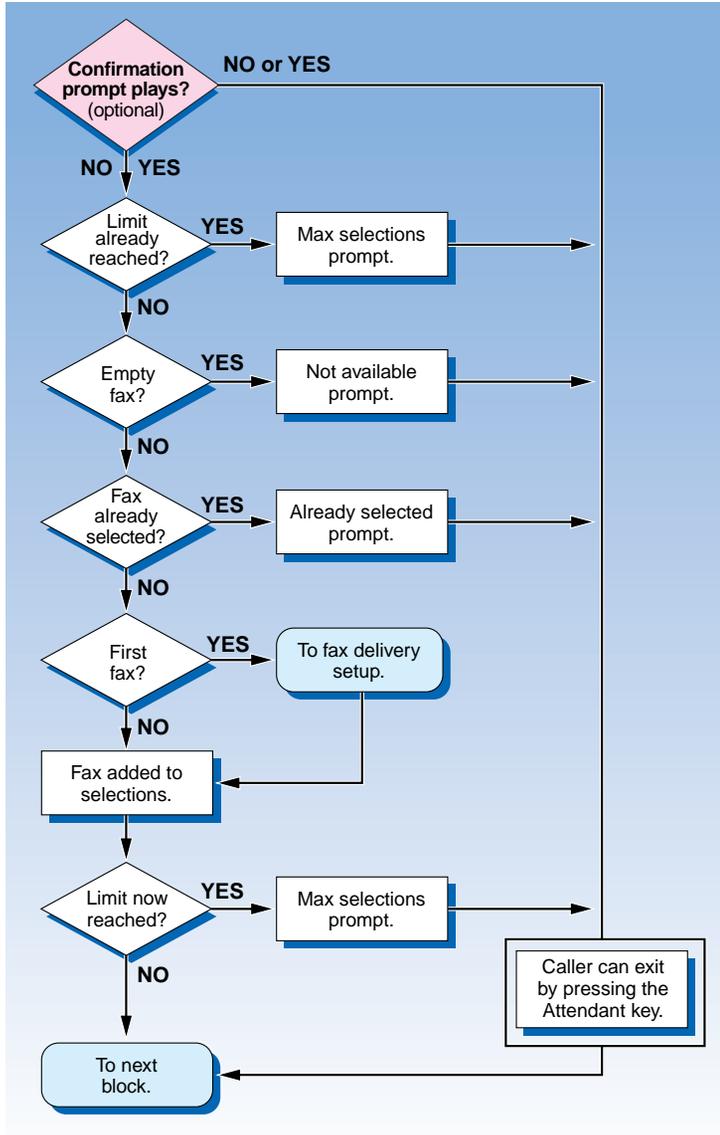
G100872

If the selected fax is the caller's first fax, then the application verifies fax
delivery setup, which is configured in the session profile.

```
┌─────────────────────────────────────────────────────────────────┐
│                          Following                                │
│                          selection of                             │
│                          first fax.                               │
│                              │                                    │
│                              ▼                                    │
│          Callback. ◄─── Delivery ───► Same -                      │
│                          mode?          call.                     │
│                              │                                    │
│                              ▼                                    │
│                        Caller's ───► Caller's choice              │
│                        choice.        prompt plays.               │
│                                           │                       │
│                                           ▼                       │
│                        NO          Caller                         │
│              ◄─────────────────── responds?                       │
│                                           │                       │
│                                       YES │                       │
│                                           ▼                       │
│   Enter callback ◄── Callback. ──► Choice? ◄── Same -             │
│   fax number.                                   call.             │
│        │                                                          │
│        ▼                                                          │
│    Caller        YES   Enter optional      Caller                 │
│    responds? ──────►   extension ──────►   confirmation.          │
│        │               number.                                    │
│     NO │                                                          │
│        ▼                                                          │
│    Caller              Caller exits                               │
│    has given     NO    fax setup and                              │
│  DTMF - input in ───►  goes to the                                │
│  the                   next block via    Confirm? ──NO──          │
│  application?          the Rotary             │                   │
│        │               output            YES │                   │
│     YES│                                       ▼                  │
│        ▼                                                          │
│    No                                    Continue with            │
│    response      YES   To next           fax selection.           │
│    limit     ─────►    block.                                     │
│    reached?                                                       │
│        │                                                          │
│     NO │                                                          │
│        ▼                                                          │
│   No response                                                     │
│   prompt plays.                                                   │
│                                                  G100873          │
└─────────────────────────────────────────────────────────────────┘
```

See also

For information about fax items, see Chapter 7, "Working with faxes."

To understand more about the session profile, see Chapter 9, "Putting applications into service."

To configure the Fax Select block, see "Configuring the Fax Select block" on page 215.

Fax Send block

Purpose

The Fax Send block delivers selected faxes via same-call or callback delivery.

Fax Send

Setup

You only connect the Fax Send block. You do not need to configure it.

Connecting

To connect the Fax Send block, direct where callers go in the application if they do not select any faxes.

Fax delivery

The Fax Send block delivers faxes using the delivery type configured in the session profile.

Relationship to other blocks

Use the Fax Send block with the Fax Select block. For more information, see "How the Fax Select and Fax Send blocks work together" on page 173.

Caller interaction

Callers do not interact with the Fax Send block. Instead, they interact with the Fax Select block, which is often used with the Fax Send block.

See also

For information about the types of fax delivery and how the session profile affects the Fax Send block, see Chapter 9, "Putting applications into service."

Language Select block

Purpose

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

Example

An international corporation uses the Language Select block in an application to route callers to human resources information in the language of their choice.

Setup

You must configure and connect the Language Select block.

Configuring
To configure the Language Select block, choose the language in which system prompts play. More than one language can be ordered and installed on the system. You can select any installed language.

Connecting
To connect the Language Select block, connect its single output to another block to direct an application's flow.

How this block affects an application

The language specified by the Language Select block remains the current language until another Language Select block appears in the application. The current language also affects any imported applications and system services (for example, Voice Messaging) that appear after the Language Select block.

If no Language Select block appears in an application, system prompts play in the default prompt language.

Caller interaction

Callers do not interact with the Language Select block. However, all system prompts after the block play in the specified language.

See also

To configure the Language Select block, see "Configuring the Language Select block" on page 218.

Menu block

Purpose

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

Menu

Example

A department store uses the Menu block to direct callers to departments. For example, the application directs callers to press 3 to reach Sporting Goods.

Setup

You must configure and connect the Menu block.

Configuring

To configure the block, select its voice recordings. The recordings describe the options associated with the phoneset's keys. The recordings prompt callers who give no response, and notify callers if they press an incorrect key. Select the maximum number of times that callers can give no response and press incorrect keys while in the menu.

Connecting

To connect the block, identify where callers go in the application after they press a key on the phoneset.

How to make menu keys valid

Menu keys are labeled 1–9 on your phoneset. For callers to use menu keys, the keys must be valid. Make a menu key valid by connecting its output to a block.

If you do not connect a menu key's output to a block, the application treats that key as invalid. If callers press an invalid key while in a menu, they hear the invalid response prompt.

How to make a menu complete

To make an entire menu complete, you must connect a menu key's output, the No Response output, and the Invalid Response output to other blocks.

Voice recordings

You must use three voice recordings with the Menu block:

- menu choices greeting
- no response prompt
- invalid response prompt

There are two types of voice recordings: a voice item and a system prompt. As their name suggests, system prompts exist on the system. They are already recorded and are ready to use. Voice items are custom recordings that you create to meet the needs of your organization.

Menu choices greeting

The menu choices greeting describes the menu's options associated with the phoneset's menu keys. You must create a voice item for the menu choices greeting.

No response prompt

The no response prompt encourages callers to press a key on the phoneset. You must create a voice item for the no response prompt.

Invalid response prompt

The invalid response prompt notifies callers when they press an invalid phoneset key. You can create a voice item or use the system prompt for the invalid response prompt.

The system prompt is as follows:

How prompt appears in Application Builder	Actual content of prompt
<default system prompt>	<<Beep>> That selection is not recognized. Please make another choice.

Relationship to other blocks

The Announcement block can affect menu keys. For more information, see "How the Announcement block works with blocks that require menu key input" on page 166.

As well, you can combine the Menu block with other blocks. See "How the Announcement, Menu, and Thru-Dial blocks work together" on page 169.

Caller interaction

When callers reach the Menu block, they usually press a valid key. However, they might give no response or press an invalid key.
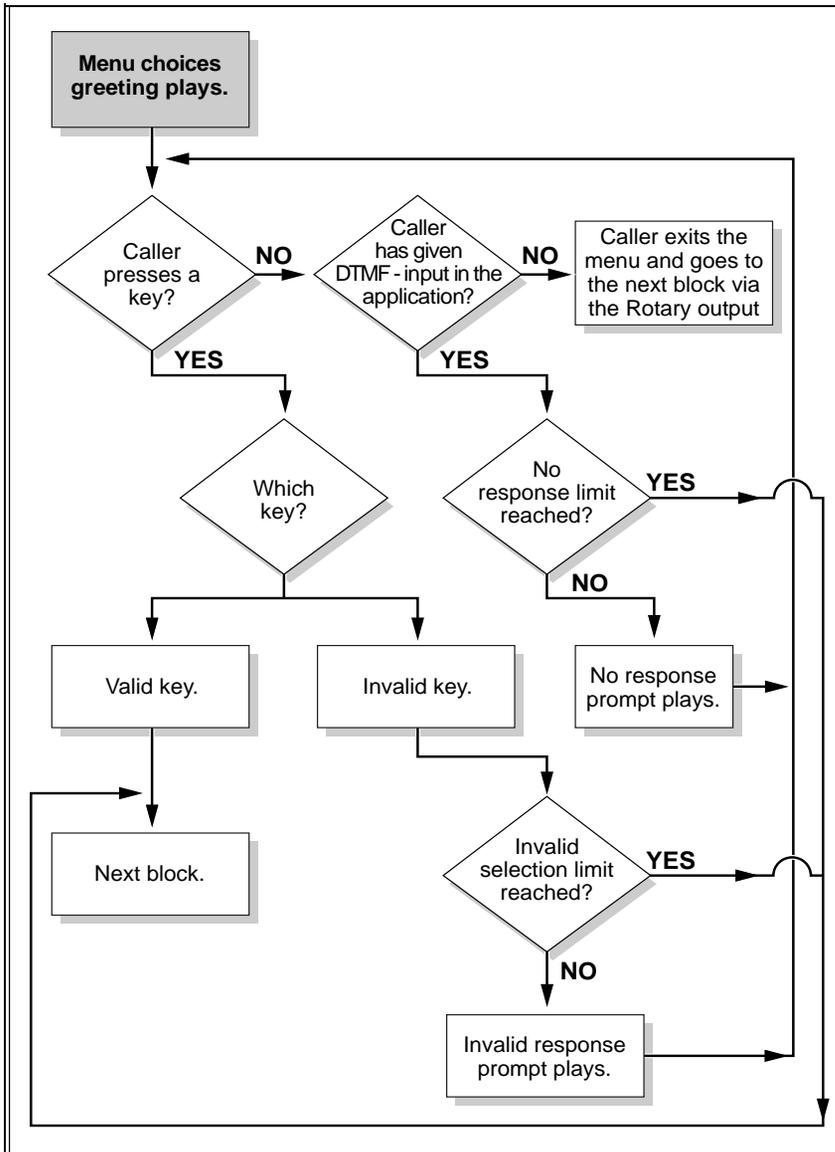
G100876

See also

See Chapter 6, "Working with voice recordings" for information about creating voice items and using system prompts.

To understand how the session profile affects the Menu block, see Chapter 9, "Putting applications into service."

To configure the Menu block, see "Configuring the Menu block" on page 220.

Password Check block

Purpose

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

Password
Check

Example

In an application, you can connect a Thru-Dial block that allows international calls to a Password Check block. Only callers who enter the correct password can place international Thru-Dial calls.

Setup

You must configure and connect the Password Check block.

Configuring

To configure the Password Check block, define up to five passwords and select an optional greeting.

Connecting

To connect the Password Check block, identify where callers go in the application if they

- enter a correct password
- enter an incorrect password
- cancel while in the block

Voice recordings

You can define the greeting that plays when callers reach the Password Check block. To create a greeting, choose between two types of voice recordings:

- system prompt
- voice item

As their name suggests, system prompts exist on the system. They are already recorded and are ready to use. Voice items are custom recordings that you create to meet the needs of your organization.

Available system prompt

The system prompt is as follows:

How prompt appears in Application Builder	Actual content of prompt
<default system prompt>	Password?

How to define a password

When you define passwords for the Password Check block, consider the following guidelines.

Duplication

Use a password only once in the Password Check block. Each password is associated with one output. As a result, duplicate passwords make the application process only the first password that it matches.

For example, suppose that you enter the same password twice. You connect the first password's output to the administrators' area of the application. You connect the second password's output to the managers' area of the application. When callers enter the password, the application takes them to the administrators' area of the application since the first matched password protects that area.

Length

This is governed in Security Administration.

Retention

Remember the passwords that you enter in the Password Check block, since they appear only as lines of asterisks. You must also communicate the passwords to the appropriate people.

Invalid password entry limits

Two invalid password entry limits, one defined in the session profile and the other defined by the Password Check block, protect the application from hacker activity.

Password Check block

The block specifies how many invalid password entries callers can make before being directed to the Cancel output.

Session profile

The session profile defines the number of invalid password entries that callers can make during one call session.

Without the session limit, callers can repeatedly try to break past the Password Check block. For example, suppose callers exit from the block before they reach the maximum number of invalid password entries. Callers can then reenter the block, which now has its number of invalid password entries reset to 0. Callers can then try to enter more passwords.

Caller interaction

The Password Check block behaves differently depending on whether callers respond, press the cancel key, or enter correct or incorrect passwords.
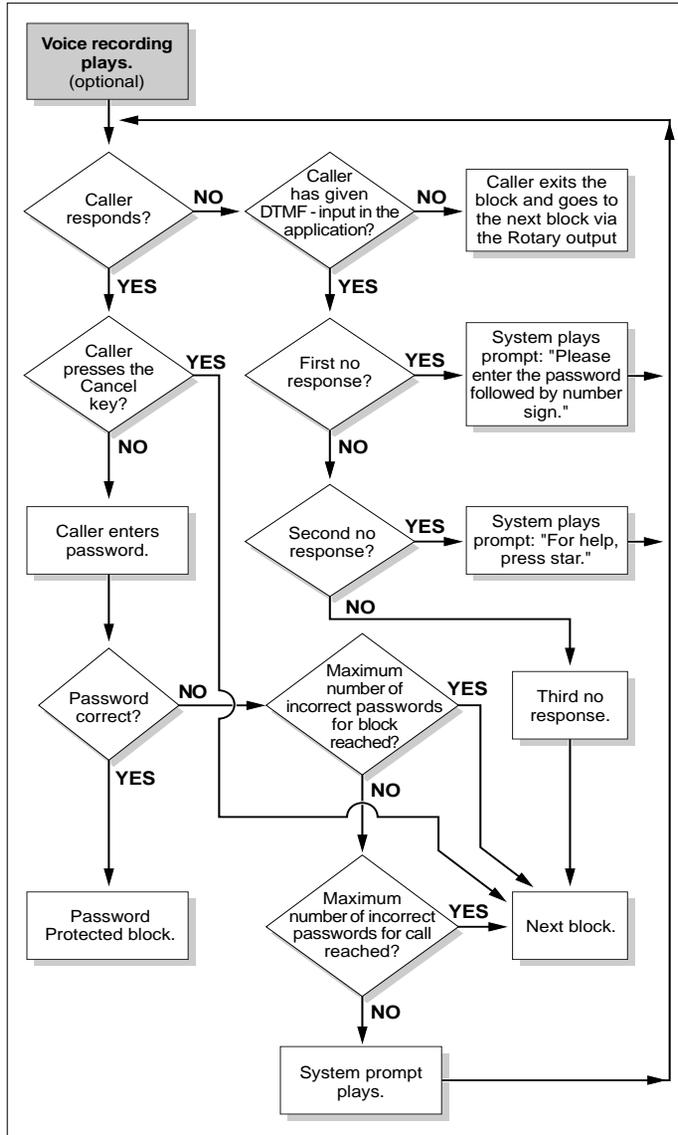
G100875

See also

For information about system prompts and voice items, see Chapter 6, "Working with voice recordings."

For information about the session profile, see Chapter 9, "Putting applications into service."

To configure the Password Check block, see "Configuring the Password Check block" on page 223.

Rotary Dial block

Purpose

The Rotary Dial block ensures that callers who use a rotary dial phoneset reach a live attendant and do not get trapped in the application. All blocks require input from the keypad of a phoneset (DTMF input). If callers do not give that input, they transfer to the Rotary Dial block.

Application Builder cannot determine whether callers actually have DTMF capability. Therefore, if callers do not enter a DTMF response before the first time-out period occurs for certain blocks, they transfer, by default, to the Rotary Dial block. The timeout period is set in the Messaging Administration program.

Rotary Dial

Example

Every application uses the Rotary Dial block. A government application often uses this block, since many callers need government-related information. Because of the Rotary Dial block, callers who use a rotary dial phoneset eventually reach a live attendant, who transfers their calls to the appropriate department.

Setup

You only connect the Rotary Dial block. You do not need to configure it.

Connecting

Connect the Rotary Dial block's single output to direct application flow. By default, this block connects to the Call Transfer block to pass non-DTMF callers to an attendant. Although you can connect this block to blocks other than the Call Transfer block, this is not recommended.

If you connect the Rotary Dial block to another block, make sure rotary dial callers are eventually routed to a live attendant. You connect a Rotary Dial block to an Announcement or a Time Control block that precedes a Call Transfer block.

You cannot cut, copy, rename, or delete the Rotary Dial block. It appears whenever you create an application.

Relationship to other blocks

The first timeout period in an application applies to the following blocks: Fax Select, Menu, Password Check, and Thru-Dial. Callers exit these blocks on the Rotary output.

Caller interaction

Callers do not interact with the Rotary Dial block. However, this block affects all non-DTMF callers.

Start block

Purpose

The Start block begins an application by directing its flow.

Start

Setup

You only connect the Start block. You do not need to configure it.

Connecting

You must connect the Start block's single output to another block.

You cannot cut, copy, rename, or delete the Start block. As the first block, it appears only in an application's window and not in the palette with the rest of the blocks. The Start block appears only once in an application.

Caller interaction

Callers are unaware of the Start block because they do not interact with it.

Thru-Dial block

Purpose

The Thru-Dial block provides an automated attendant service that transfers callers to the extension they choose.

Thru-Dial

Example

A multimedia company uses the Thru-Dial block to let callers dial employees by name or extension number.

Setup

You must configure and connect the Thru-Dial block.

Configuring

To configure the Thru-Dial block, select a voice recording to play as the greeting. As well, define whether callers can specify the person they wish to call by name, extension number, or both. By selecting a restriction/permission list, you determine the type of extension numbers (for example, long distance) that callers can access.

Connecting

To connect the Thru-Dial block, identify where callers go in the application if the system cannot transfer them to the specified extension.

Default fax delivery

If any faxes have not been delivered by the system, default fax delivery occurs when an application encounters the Thru-Dial block.

Types of extension numbers

There are two types of extension numbers:

- fixed length
- variable length

The first few digits of a fixed-length number are called left-pad digits.

Fixed-length extension numbers

Fixed-length extension numbers have a definite number of digits. For example, a phone number in your dialing area may have seven digits.

Left-pad digits

Typically, fixed-length extension numbers begin with the same digits, called left-pad digits. For example, a company's main phone number is 686-0000. All company phone numbers begin with 686, but have other different digits. The 686 digits are the left-pad digits.

Variable-length extension numbers

Variable-length extension numbers have an indefinite number of no more than 15 digits. If you define variable-length extension numbers, callers can enter up to 15 digits for an extension number.

Why to use fixed-length digits or left-pad digits

When you define fixed-length extension numbers and their left-pad digits, you save callers from having to enter prefix digits when they phoneset frequently called locations.

For example, the ABC Company's main phone number is 555-0000. All employees at the company have their own phone numbers: Jonah Smith's number is 555-7624; Jessica Freedman's number is 555-8845. To set up a Thru-Dial block in a company application, specify that the fixed length number is seven. Seven digits make up each phone number. Since each number begins with 555, you define those three digits as left-pad. As a result, callers who use the Thru-Dial block to contact Jonah only enter 7624. Likewise, they only enter 8845 to reach Jessica.

Callers can enter some or all of the left-pad digits. If they enter all of Jonah's number, they still reach him. They also reach him if they dial 57624.

How the number sign affects extension numbers

The number sign (#) affects how callers enter both variable-length numbers and fixed-length extension numbers.

Callers must use the number sign to terminate variable-length extension numbers. For fixed-length extension numbers, callers can enter fewer digits only if these digits are followed by the number sign.

Restriction/permission list

A restriction/permission list (RPL) limits the numbers that callers can dial from the Thru-Dial block. The list governs which thru-dials callers can make from their local switch. For example, an RPL can prevent callers from placing a long distance call, even if they enter the correct number.

If a caller enters a restricted number, the block plays a system default error message and asks the caller to try another number.

Types of dialing

Callers can dial people by name, extension number, or both.

Name dialing
Name dialing means calling a person by spelling his or her name with the alphabet keys on the phoneset keypad.

Number dialing
Number dialing means calling a person by pressing the digits of his or her extension number on the phoneset keypad.

Why to use both name and number dialing

You usually configure both name and number dialing. Name dialing ensures that callers can contact people without knowing their extension numbers.

To dial people by name, callers first enter the telephone number of the Name Dialing service. By default, the prefix for this service is 11. The prefix is configured in the Messaging Administration program. Ensure that you communicate the name dialing prefix in the appropriate voice recording used with the Thru-Dial block.

Name dialing disabled on the system

The Messaging Administration program determines whether callers can use name dialing. Therefore, the program can override the dialing options that you configure for the Thru-Dial block. You need to understand how the override affects applications that contain the Thru-Dial block.

If callers cannot use name dialing, that configuration in Messaging Administration affects two dialing options for the Thru-Dial block:

■   name dialing only

■   name and number dialing

Name dialing only
If you configure name dialing only for the Thru-Dial block, and Messaging Administration does not let callers use name dialing, then callers cannot use the Thru-Dial block. Instead, they hear a prompt when they reach the Thru-Dial block, and they exit on its Cancel output.

Name and number dialing
If you configure both name dialing and number dialing for the Thru-Dial block, and Messaging Administration does not let callers use name dialing, then callers can use only number dialing with the Thru-Dial block. In turn, the system prompt associated with number dialing plays in place of any voice item that you have configured.

Voice recordings

To create a Thru-Dial greeting, you choose between two types of voice recordings:

■   system prompt

■   voice item

As their name suggests, system prompts exist on the system. They are already recorded and are ready to use. Voice items are custom recordings that you create to meet the needs of your organization.

Available system prompts

If you use a system prompt as the greeting, the prompt that plays depends on the configuration of the Thru-Dial block.

Configuration of the Thru-Dial block	Actual content of prompt
Only name dialing is allowed.	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.
Only number dialing is allowed, and the numbers are variable length.	Please enter the number of the extension you wish to dial, followed by number sign.
Only number dialing is allowed, and the numbers are fixed-length.	Please enter the number of the extension you wish to dial.
Both name dialing and number dialing are allowed, and the name-dialing prefix is 11.	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 first name, and then spell the last name.

Relationship to other blocks

You can combine the Thru-Dial block with the Announcement and Menu blocks. For more information, see "How the Announcement, Menu, and Thru-Dial blocks work together" on page 169.

Caller interaction

Most callers pass through the Thru-Dial block quickly and exit from the application. Some callers interrupt the Thru-Dial or give no response.

```
┌─────────────────────────────────────────────────────────────────────┐
│                                                                       │
│   ┌──────────────────┐                                                │
│   │ Voice recording   │                                               │
│   │     plays.        │                                               │
│   │   (optional)      │                                               │
│   └────────┬─────────┘                                                │
│            │                                                          │
│            ▼                                                          │
│        ◇ Caller ◇           ◇ Caller ◇      YES   ┌──────────────┐   │
│      interrupts    NO      responds?     ────────▶│ Caller enters │   │
│    recording with the   ◇           ◇             │ Thru-Dial name│   │
│   ◇  Attendant or  ◇ ───────▶                     │  or number.   │   │
│       Cancel                                      └──────┬───────┘   │
│   ◇    key?    ◇              │ NO                        │           │
│                              │                           ▼           │
│       YES                    │                  ┌──────────────┐     │
│        │                     ▼                  │Caller transfers│    │
│        ▼               ◇  Caller  ◇             │successfully and│    │
│   ┌──────────┐        has given      NO         │exits application│   │
│   │Next block.│   ◇ DTMF - input in the ◇ ─────▶┌──────────────┐     │
│   └──────────┘        application?              │ Caller exits the│    │
│                    ◇              ◇             │ thru-dial and goes│  │
│                              │                  │to the next block via│ │
│                              │ YES              │ the Rotary output │   │
│                              ▼                  └──────────────┘     │
│                         ◇   No   ◇   NO        ┌──────────────┐      │
│        YES            resonse limit  ─────────▶│ No response   │      │
│       ◀──────────── ◇  reached?  ◇             │ prompt plays. │      │
│                         ◇     ◇                └──────────────┘      │
│                                                          G100874      │
└─────────────────────────────────────────────────────────────────────┘
```

See also

For information about default delivery, see "Fax Select block" on page 110.

For information about system prompts and voice items, see Chapter 6, "Working with voice recordings."

To configure the Thru-Dial block, see "Configuring the Thru-Dial block" on page 226.

Time Control block

Purpose

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

Time Control

Example

A company uses the Time Control block in an application so that during business hours, callers reach the receptionist. Outside business hours, callers reach the company's automated attendant.

Setup

You must configure and connect the Time Control block.

Configuring
To configure the Time Control block, define the time period.

Connecting
To connect the Time Control block, identify where callers go in the application, depending on the time of day.

Definition: Time period

A time period defines the time of day during which the application routes callers to a specific part of an application. One time period has up to five subperiods.

Time subperiods

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

For example, you can define a receptionist's working hours as 8:30 to 10:00, 10:15 to 12:00, 13:00 to 14:30, and 14:45 to 17:00.

Inside and outside a time period

When callers access an application, the system checks the current time against each time subperiod. If the current time falls within one of the subperiods, then callers access the application inside the time period. If callers access an application at a time not included within any time subperiod, then they access the application outside the time period. Calling inside or outside a time period determines the portion of an application that callers access.

How to configure a time period

When you configure a time period, you can

- overlap subperiods
- span two days
- define one-minute periods
- make a continuous time period

Overlapped subperiods

You can overlap the times specified in subperiods. The block follows the same rule: if the current time falls within any one of the specified time subperiods, the time is considered within the time period and callers exit the block according to the Inside output.

Later start time than end time

For any subperiod, if the start time is later than the end time, the block assumes the date range wraps around midnight, from one day to the next. For example, if a time period specifies 23:00 to 1:00, the block checks whether the time falls between 23:00 and 23:59 or between 00:00 and 1:00. If the time falls within one of those ranges, callers exit the block according to the Inside output.

Same start time and end time

If the start time and end time are the same for any subperiod, that subperiod is considered one minute. For example, if a Time Control block specifies only one subperiod from 1:00 to 1:00, the block exits callers according to the Inside output only if the current time is between 1:00:00 to 1:00:59 inclusive.

Continuous time period

To make a continuous time period, specify it from 00:00 to 23:59.

Relationship to other blocks

You can combine the Time Control block with other blocks to define a more specific time. For more information, see "How the Time Control, Day Control, and Date Control blocks work together" on page 176.

Caller interaction

Callers do not interact with the Time Control block. However, this block affects them because an application behaves differently depending on the time that they call.

See also

To configure the Time Control block, see "Configuring the Date Control, Day Control, and Time Control blocks" on page 210.

Unavailable block

Purpose

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

Setup

The Unavailable block appears in an application's window if that application cannot communicate with an imported application. The Unavailable block replaces an Imported Application block. The Unavailable block also appears in an application's window if that application contains a fax function but resides on a system without fax capability. The Unavailable block appears in place of each fax-related block.

You do not configure the Unavailable block or connect any outputs. You cannot copy or rename the block. If you understand why this block appears, you can eliminate it.

Why the Unavailable block appears

The Unavailable block appears when something goes wrong with the archiving and restoring of an application.

- The imported applications were not archived or restored on the system, and the application in which they reside was archived. As a result, an Unavailable block appears instead of the imported applications.

- An application that contains fax functions was archived and then restored on a system without fax capability. Therefore, an Unavailable block appears in place of each application's fax-related blocks.

How to eliminate the Unavailable block

After you restore an application, you must open and save it before installing it in the SDN Table. When you open the application, you can see whether it is incomplete. An Unavailable block makes an application incomplete.

How you eliminate the Unavailable block depends on why it appears. You follow one process if an application has lost a fax function. You follow another process if an application has lost imported applications.

Getting there   CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder

To fix an application with lost fax functionality

1   Open the application.

2   Search for Unavailable blocks.

3   Delete the blocks.

4   Reconnect and reconfigure other blocks to complete the application.

To fix an application with lost imported applications

1   Locate the imported applications.

2   Archive and restore the applications on the same system as the application that imports them.

Irretrievable imported applications

If you cannot locate imported applications, you must follow the same process that you follow for an application with a lost fax function. In an application with missing links, you delete the Unavailable blocks, and reconfigure and reconnect the application until it is complete. An application without imported applications might not be useful, depending on how much functionality those imported applications supplied.

Caller interaction

Callers cannot interact with the Unavailable block. If this block appears in an application, the application is not available to callers.

See also

For information about connecting and configuring blocks, see Chapter 5, "Working with blocks."

For information about recognizing when an application is complete, see Chapter 3, "Working with applications."

For information about the SDN Table, see Chapter 9, "Putting applications into service."

Section C: System blocks

In this section

Custom Commands block

Purpose

The Custom Commands block allows users to create custom commands for the Speech Activated Messaging system (for example, recording a synonym for a command, or recording a word or phrase in another language as a synonym for a command).

Custom
Commands

Setup

You do not configure or connect the Custom Commands block.

Default fax delivery

If any faxes have not been delivered by the system, default fax delivery occurs when an application encounters the Custom Commands block.

Caller interaction

Callers cannot return to the application once they transfer to the Custom Commands service.

Express Voice Messaging block

Purpose

The Express Voice Messaging block transfers callers to the Express Voice Messaging service and lets them leave a voice message in a mailbox.

Setup

You only configure the Express Voice Messaging block. You do not connect it.

Configuring

To configure the block, determine whether callers leave messages in mailboxes that they specify or in a mailbox that you specify.

Configuring for Network Message Service

If you are configuring for Network Message Service, you must ensure that your system recognizes the location of a mailbox. Treat the data in the mailbox field as a prime dialable DN, and add the location prefix exactly as it is dialed from the switch. For example, suppose that the prime location has prefix 1 and a satellite location has prefix 2. Say that each location has a user and mailbox at extension 7000. If Express Voice Messaging is set up to leave messages in the mailbox at location 2, the administrator must enter 27000 in the mailbox field. If Express Voice Messaging is to leave a message in the mailbox at location 1, the administrator must enter 17000 or 7000, since both are dialable from the prime.

Default fax delivery

If any faxes have not been delivered by the system, default fax delivery occurs when an application encounters the Express Voice Messaging block.

Caller interaction

Callers cannot return to the application once they transfer to the Express Voice Messaging service.

See also

For information about default delivery, see "Fax Select block" on page 110.

To configure the Express Voice Messaging block, see "Configuring the Express Voice Messaging block" on page 230.

Express Fax Messaging block

Purpose

The Express Fax Messaging block transfers callers to the Express Fax
Messaging service and enables them to leave a fax message in a mailbox.

Express Fax
Messaging

Setup

You only configure the Express Fax Messaging block. You do not connect it.

Configuring

To configure the Express Fax Messaging block, determine whether callers leave
fax messages in mailboxes that they specify or in a mailbox that you specify.

Configuring for Network Message Service

If you are configuring for Network Message Service, ensure that your system
recognizes the location of a mailbox. Treat the data in the mailbox field as a
prime dialable DN, and add the location prefix exactly as it is dialed from the
switch. For example, suppose that the prime location has prefix 1 and a satellite
location has prefix 2. Say that each location has a user and mailbox at extension
7000. If Express Fax Messaging is set up to leave messages in the mailbox at
location 2, the administrator must enter 27000 in the mailbox field. If Express
Fax Messaging is to leave a message in the mailbox at location 1, the
administrator must enter 17000 or 7000, since both are dialable from the prime.

Faxphone required

To use the Express Fax Messaging service, callers must use a faxphone.

Default fax delivery

If any faxes have not been delivered by the system, default fax delivery occurs when an application encounters the Express Fax Messaging block.

Caller interaction

Callers cannot return to the application once they transfer to the Express Fax Messaging service.

See also

For information about default delivery, see "Fax Select block" on page 110.

To configure the Express Fax Messaging block, see "Configuring the Express Fax Messaging block" on page 232.

Fax Item Maintenance block

Purpose

The Fax Item Maintenance block transfers callers to the Fax Item Maintenance service, which lets a caller edit fax items.

Fax Item
Maintenance

Setup

You do not configure or connect the Fax Item Maintenance block.

Default fax delivery

If any faxes have not been delivered by the system, default fax delivery occurs when an application encounters the Fax Item Maintenance block.

Caller interaction

Callers cannot return to the application once they transfer to the Fax Item Maintenance service.

See also

For information about default delivery, see "Fax Select block" on page 110.

For information about Fax Item Maintenance, see Chapter 10, "Maintaining applications."

Multimedia Messaging block

Purpose

The Multimedia Messaging block transfers callers to the Multimedia Messaging service, which lets callers use a DTMF phoneset to access their mailboxes for maintenance and for message retrieval and composition.

Multimedia
Messaging

Setup

You do not configure or connect the Multimedia Messaging block.

Default fax delivery

If any faxes have not been delivered by the system, default fax delivery occurs when an application encounters the Multimedia Messaging block.

Caller interaction

Callers cannot return to the application once they transfer to the Multimedia Messaging service.

See also

For information about default delivery, see

Speech Activated Messaging block

Purpose

The Speech Activated (SA) Messaging block transfers callers to the SA Messaging service. This service lets callers use paced speech recognition to access their mailboxes for administration and for message retrieval and composition.

SA Messaging

Setup

You do not connect the SA Messaging block. However, you must configure it if you want callers to use paced speech recognition.

Paced speech recognition

Paced speech recognition enables callers to speak one digit at a time. With paced speech recognition configured, callers can say a mailbox number as "7 (pause), 6 (pause), 2 (pause), 4" instead of saying "7624."

SDN entry

If an application includes the SA Messaging block, the entry for the application in the SDN Table must use the appropriate channels for speech recognition.

Default fax delivery

If any faxes have not been delivered by the system, default fax delivery occurs when an application encounters the SA Messaging block.

Caller interaction

Callers cannot return to the application once they transfer to the SA Messaging service.

See also

For information about default delivery, see "Fax Select block" on page 110.

Voice Item Maintenance block

Purpose

The Voice Item Maintenance block transfers callers to the Voice Item Maintenance service, which lets them edit voice items.

Voice Item
Maintenance

Setup

You do not configure or connect the Voice Item Maintenance block.

Default fax delivery

If any faxes have not been delivered by the system, default fax delivery occurs when an application encounters the Voice Item Maintenance block.

Caller interaction

Callers cannot return to the application once they transfer to the Voice Item Maintenance service.

Comparison to Meridian Mail

In Meridian Mail, Voice Item Maintenance is called Voice Prompt Maintenance.

See also

For information about default delivery, see "Fax Select block" on page 110.

For information about Voice Item Maintenance, see Chapter 10, "Maintaining applications."

Section D: Imported application blocks

In this section

Continue block

Purpose

The Continue block passes the caller from an imported application to the destination application.

Continue

Setup

The Continue block does not appear in the palette. Instead, this block appears when you export an application. You must export an application before you can import it into another application.

In the exported application, you must connect at least one other block to the Continue block. Connect any blocks that should take callers from the imported application to the importing application.

Relationship to other blocks

For information about how the Continue block affects the Imported Application block, see .

Caller interaction

Callers are unaware of the Continue block because they do not interact with it.

Imported Application block

Purpose

The Imported Application block places one application within another one. If the functionality of the imported application changes, it updates in all the applications that imported it.

This is an example of an imported application block showing its unique name and number.

FMENU.1002

Distinguishing between importing and exported applications

An importing application is a destination application. An exported application is a source application.

Destination application
A destination application is an application into which another application has been imported. Usually, many types of functions make up a destination application. Imported applications supply some of the functions.

Source application
A source application is an application that has been imported into a destination application. Usually, a source application provides only one function. This function can be used in more than one application.

Setup

If you import a source application into a destination application, a block appears on the Imported Applications tab of the palette. The block has the same name as the source application that it represents.

You do not configure the Imported Application block. However, you must connect it.

Connecting

The Imported Application block's outputs represent the End and Continue blocks in its source application. By default, the End output connects to the End block of the destination application. Also in the destination application, you must connect the Continue output to another block.

Relationship to other blocks

See "How the Continue and Imported Application blocks work together" on page 171.

Caller interaction

Callers are unaware of the Imported Application block because they do not interact with it. Callers interact with the imported application just as they interact with the source application.

See also

For more information about importing applications, see Chapter 8, "Reusing existing applications."

Section E: Blocks that work together

In this section

How the Announcement block works with blocks that require menu key input

Introduction

If you configure a phoneset's menu keys to interrupt an Announcement block, you can also enable the keys to act as input for the next block. Typically, the next block is a Menu block. However, an Announcement block can affect other blocks that require menu key input, such as the Thru-Dial block.

Definition: Key buffering

Key buffering means phoneset's menu keys can both

■   interrupt an announcement

■   act as input for both the Announcement block and the next block, unless the next block is another Announcement block

Menu keys

Menu keys are the keys labeled 1–9 on your phoneset.

Two Announcement blocks

An Announcement block always stops the key buffering initiated by a preceding Announcement block. For example, suppose that two Announcement blocks are joined. Both of them can be interrupted by menu keys and have key buffering configured. When callers interrupt the first announcement, they move to the second announcement. Only after hearing the beginning of the second announcement can callers interrupt it.

Enabled key buffering

Enable key buffering both by configuring an Announcement block as interruptible by menu keys, and by ensuring that the Key Buffering box is checked.

Effect of key buffering

Consider how an announcement with key buffering affects callers. Experienced callers can speed through an application because they can bypass blocks. However, inexperienced callers can become confused.

If an Announcement block that can be interrupted by menu keys and enabled with key buffering comes before a Thru-Dial block, the arrangement of blocks can confuse callers. The key that interrupts the announcement acts as the first digit for the extension number required by the Thru-Dial.

Examples of key buffering

Suppose that an application for a travel agency contains an Announcement block followed by a Menu block. The phoneset's menu keys interrupt the announcement, and the application uses key buffering. A caller dials the application and reaches the announcement that greets callers. Because the caller knows he wants to dial a particular travel agent, he presses 3. Pressing 3 interrupts the announcement, prevents the menu's initial greeting and options from playing, and moves the caller to the Thru-Dial block attached to the Menu block's output for key 3. Because of key buffering, the Menu block treats key 3 exactly as if the caller pressed it at the start of the block. At the Thru-Dial block, the caller dials the agent by number.

A human resources application contains two Announcement blocks followed by a Menu block. The first announcement greets callers, the second announcement provides any important employee information, and the menu presents options to callers. The phoneset's menu keys interrupt both announcements, and the application buffers the keys for both of them. A caller phones the application about her employee benefits for the second day in a row. While listening to the first announcement, she presses 2. Key 2 interrupts the first announcement. The second announcement starts to play, but because the caller has already heard the employee information, she interrupts the announcement by pressing 4. Key 4 prevents the menu's options from playing and moves the caller to the Fax Select block attached to the Menu block's output for key 4. The Fax Select block gives the caller information about benefits.

Disabled key buffering

To disable key buffering, ensure that the Key Buffering box is not checked.

Effect of no key buffering

Without key buffering, callers cannot speed through an application and must listen to all its information. No key buffering assists inexperienced callers, but the same application can frustrate experienced or impatient callers.

Example of no key buffering

In the application for a bookstore, a menu follows an announcement. Although key buffering is disabled, callers can interrupt the announcement with menu keys. The announcement greets callers and tells them about any in-store events. While listening, a caller presses 2. That key interrupts the announcement and moves her to the Menu block, so that the menu's initial greeting plays. The caller listens to the greeting to hear the many options and to find out which key to press for special orders.

See also

For more information about how to let callers interrupt an announcement, see

How the Announcement, Menu, and Thru-Dial blocks work together

Introduction

When you combine the Announcement, Menu, and Thru-Dial blocks, you can customize your applications in several ways.

The Announcement and Menu blocks

Use the Announcement block to customize a menu.

Greeting

Combine two Announcement blocks with two Time Control blocks and a Menu block to create a greeting appropriate for the time of day that welcomes callers before they hear menu options.

For example, if callers access the menu in the morning, the greeting begins with "Good morning" and then presents the menu's options. In the afternoon, callers hear "Good afternoon" before the menu's options.

The following diagram illustrates this application.

Help

Use the Announcement block to provide extra help information for a menu.

The Menu and Thru-Dial blocks

Use Thru-Dial blocks with a Menu block to set up multiple instances of Thru-Dial.

For example, after accessing a menu, callers press the appropriate menu key for the department they want to access. Once they reach the department, they hear an appropriate Thru-Dial greeting. Then, they dial the extension of their choice.

The Thru-Dial and Announcement blocks

Use the Announcement block with a Thru-Dial block to ensure that callers cannot interrupt the greeting that plays for the Thru-Dial.

By default, callers can interrupt the greeting associated with the Thru-Dial block. To stop them from interrupting the greeting, you can choose No Greeting for the block. Place an Announcement block in front of the Thru-Dial block. Associate your Thru-Dial greeting with the Announcement block, and configure the Announcement block so that the greeting cannot be interrupted.

See also

Key buffering affects the Announcement, Menu, and Thru-Dial blocks because these blocks require menu key input. For information about key buffering, see "How the Announcement block works with blocks that require menu key input" on page 166.

How the Continue and Imported Application blocks work together

Introduction

The Continue and Imported Application blocks work together to allow you to export and import applications.

Distinguishing between exported and importing applications

An exported application is a source application. An importing application is a destination application.

Destination application

A destination application is an application into which another application has been imported. Usually, many types of functions make up a destination application. Imported applications supply some of the functions.

Source application

A source application is an application that has been imported into a destination application. Usually, a source application provides only one function. This function can be used in more than one application.

How to export and import an application

You must export a source application before you can import it into a destination application. To export an application, use the Continue block. To import an application, use the Imported Application Block. The process of exporting and importing involves four steps.

1. Export the source application.

2. In the source application, connect a block to the Continue block.

3. In the destination application, import the source application.

4. In the destination application, connect the Imported Application block to another block.

Export the source application

When you export a source application, a Continue block appears in it.

Connect the Continue block

In the source application, you can connect blocks to the Continue block. The Continue block allows callers to move from the source application to the destination application. For example, callers call the destination application, go to the source application, and then go back to the destination application. Therefore, connect any blocks to the Continue block that take callers from the source application to the destination application. If you do not connect any block to the Continue block, the source application is the terminating application.

Import the source application

In the destination application, import the source application. On the Imported Applications tab of the palette, a block appears with the name of the source application. If you change the functions offered by the source application, it automatically updates in the destination application.

Connect the Imported Application block

Before you can connect the Imported Application block, you must move it from the palette to the window of the destination application. The block has two outputs: End and Continue.

Both outputs correspond to parts of the source application. Like every application, the source application has an End block. This End block corresponds to the Imported Application block's End output. Similarly, the source application's Continue block corresponds to the Imported Application block's Continue output. Therefore, after callers reach the Continue block in the source application, they go to the block connected to the Continue output of the Imported Application block. The Continue block directs where they go next in the destination application.

See also

For information about importing applications, see Chapter 8, "Reusing existing applications."

How the Fax Select and Fax Send blocks work together

Introduction

When you combine the Fax Select and Fax Send blocks, you create a fax-on-demand application. However, depending on how you set up your application, you sometimes need to use only the Fax Select block.

Definition: Fax-on-demand application

A fax-on-demand application enables callers to select and receive faxes.

How the session profile affects fax items

To include fax items in an application, define the application's fax options in the session profile of the SDN Table. In the session profile, establish settings for all fax applications and other settings that are specific to fax applications that use callback delivery.

For all fax applications

In the session profile, establish the following settings for all fax applications:

- the maximum number of faxes a caller can select during one call
- the maximum number of fax pages that the system delivers to a caller during one call
- the telephone number of the fax machine that the system uses to send faxes
- the fax delivery method (callback, same-call, caller's choice)
- whether a custom cover page, called a sponsor fax item, transmits with each fax
- how page transmission errors are handled

For fax applications that use callback delivery

In the session profile, you also establish the following settings for fax applications that use callback delivery:

- the DN to which fax callback transmissions are billed

- whether the system cover page transmits with each fax

- the extension number of the fax recipient

- the type (for example, national) of fax machine number for which the system must prompt callers so it knows where to deliver faxes

- the restriction/permission list against which the fax machine number must be validated before the system can make a fax callback transmission

What each block does

Each Fax Select block in an application represents one fax that callers can select. You can also include a Fax Send block to deliver the selected fax to callers. However, an application can deliver faxes using another method.

How an application delivers faxes

To ensure that the system sends faxes to callers according to the type of fax delivery specified in the session profile, you either

- include the Fax Send block

or

- use default delivery

Including the Fax Send block

Place and configure the Fax Send block after the Fax Select block. This method is the best way to ensure faxes are delivered.

Using default delivery

Default delivery occurs in an application if faxes are selected and one of the following events occur:

- a caller hangs up

- an error occurs in the application

- a caller reaches a Thru-Dial, system, Call Transfer, or End block before the Fax Send block

Example

Suppose that you have an announcement that says "Thank you for calling. Goodbye." This announcement precedes the End block. If callers have selected faxes and there is no Fax Send block, then the End block activates default delivery. As a result, after the "goodbye" message, the system asks callers whether they want their selected faxes delivered.

After callers have heard "goodbye," they should not be prompted about delivery. This sample application makes more sense to a caller if it does not depend on default delivery. To correct the problem, place a Fax Send block before the Announcement and End blocks.

See also

For information about these two blocks, see "Fax Select block" on page 110 and "Fax Send block" on page 118.

For information about the session profile, see Chapter 9, "Putting applications into service."

How the Time Control, Day Control, and Date Control blocks work together

Introduction

When you combine the Time Control, Day Control, and Date Control blocks, you gain several ways to specify periods of time in your applications.

The Time Control and Day Control blocks

Use the Time Control block with the Day Control block to transfer callers to an appropriate service at the correct time on the correct day.

For example, callers who access a company's application on a weekday during business hours reach a receptionist. Callers reach the auto attendant on a weekday during nonbusiness hours. Callers also reach the auto attendant on weekends.

The Time Control and Date Control blocks

Use the Time Control block with the Date Control block to transfer callers to an appropriate service at the correct time on the correct date.

For example, callers access an application for the registrar's office at a university. If callers access the application on a registration date and during business hours, they reach a service that allows them to register by phoneset. If callers access the application on a non-registration date and during business hours, they reach a receptionist. On any date and during nonbusiness hours, callers reach an announcement that tells them the hours of operation for the registrar's office.

More than one Time Control block

Use more than one Time Control block to accurately route calls during various time periods.

For example, the support staff on the help desk of a software company take turns on the desk because they also teach classes. Between 9 a.m. and 3 p.m., the application routes callers to staff. After 3 p.m., the application sends callers to a mailbox in which they can leave messages for staff.
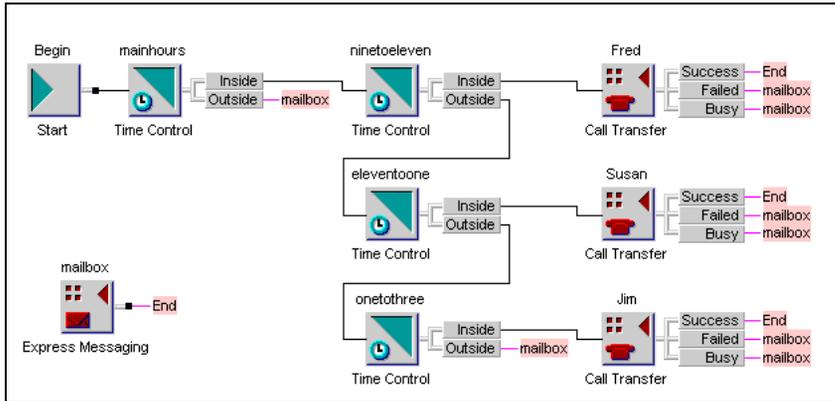
During 9 a.m. and 11 a.m., the application transfers callers to Fred. At that time, Susan is teaching a class. During Fred's class, between 11 a.m. and 1 p.m., the application transfers callers to Susan. Between 1 p.m. and 3 p.m., callers reach Jim.

How the Rotary Dial and Call Transfer blocks work together

Introduction

Combine the Rotary Dial and the Call Transfer blocks to ensure that callers without DTMF phonesets do not get trapped in applications.

DTMF capability

All applications require DTMF input, but applications cannot tell whether callers actually have DTMF. Callers are routed by default to the Rotary Dial block if they do not give input before the first time-out period occurs for the following blocks: Fax Select, Menu, Password Check, and Thru-Dial.

What each block does

If callers do not give DTMF input in an application before the first time-out period occurs, they transfer to the Rotary Dial block by default. The Rotary Dial block directs these callers to another block. By default, the Rotary Dial block connects to the Call Transfer block. After reaching that block, callers transfer to the default attendant or to the extension of your choice.

Why you connect these blocks

By connecting the Rotary Dial block to the Call Transfer block, you ensure that non-DTMF callers can exit from an application and speak to a live attendant.

If you connect the Rotary Dial block to another block, make sure that callers using a rotary dial phoneset are eventually routed to a live attendant. You can connect a Rotary Dial block to an Announcement or a Time Control block that precedes a Call Transfer block.

How the End block works with all system blocks

Introduction

In your applications, all system blocks remain connected to the End block so callers can go from applications to system services.

Difference between a service and an application

A service is an existing application that comes with the system, like Express Voice Messaging. An application is any application you create using Application Builder.

What each block does

Each system block represents a service, such as Express Voice Messaging, on the system. A system block transfers callers to an appropriate service. However, the application from which callers come must finish. The End block finishes all applications.

Chapter 5

Working with blocks

In this chapter

Section A: About working with blocks

In this section

About connecting and configuring blocks

Introduction

When you build an application, you configure and connect blocks. You connect all blocks, but you configure only some of them.

Where you put blocks

To be part of an application, a block must appear in that application's window. Whenever you create an application, some blocks automatically appear in its window. For example, the Start and End blocks always appear. However, most blocks reside in the palette. Therefore, you must move them from the palette to the application window. After you move the blocks, you can configure and connect them.

Knowing when to configure and connect a block

If you see a pink border around a block when you move it into the application window, you must connect or configure it, or both.

Why blocks have pink borders

The border indicates that the block is incomplete. You must configure or connect all incomplete blocks. The border acts as a visual reminder of which blocks you must complete.

Connecting

To connect a block, link the block's output to another block. You must connect every block, except the End block, to another block. When you connect blocks, you create the paths that callers take through the application. A path is also known as the call flow.

Configuring

To configure a block, open it, define its parameters, and associate voice recordings and faxes with it. Only certain blocks require configuration.

Knowing which blocks to configure

Open a block to find out whether you need to configure a block. If you see "This block has no input parameters," you do not have to configure the block.
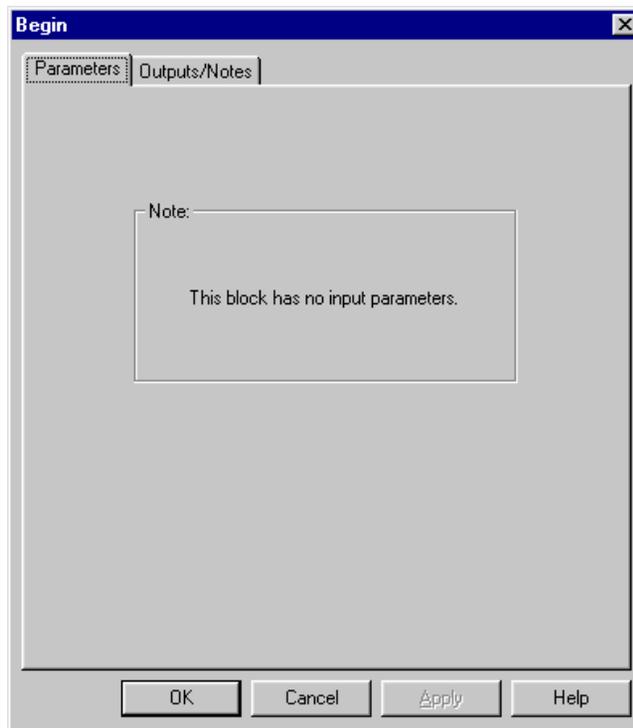
If you open a block and see boxes that require input, you must fill them in. By doing so, you configure the block.
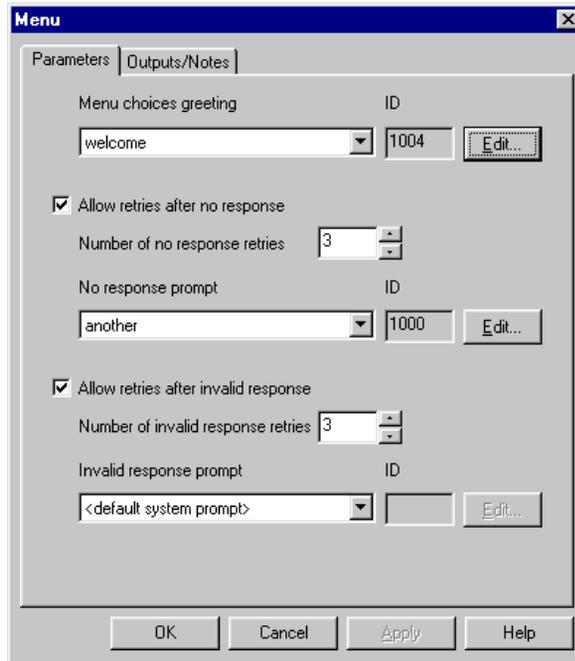
See also

For information about each block, see Chapter 4, "Understanding blocks."

For information about how to create applications, see Chapter 2, "Creating applications."

How voice recordings and faxes work with blocks

Introduction

In an application, you add voice recordings and faxes by associating them with blocks. You associate voice and fax when you configure a block. In the context of Application Builder, voice recordings are called voice items and faxes are called fax items.

How you associate voice items with blocks

To associate a voice item, specify a file that contains a voice recording for the appropriate block.

Blocks with which you associate voice items

You can associate voice items with various blocks, such as the Announcement, Call Transfer, and Thru-Dial blocks. You can even associate more than one voice item with some blocks. For example, the Menu block needs a voice item to describe the phoneset keys and another voice item to remind callers to press those keys.

How you associate a voice item

To associate a voice item with a block, select its file name.

An imported voice item must be in WAV format. You can use the Sound Recorder that comes with Microsoft Windows to save voice in this format.

How you associate fax items with blocks

To associate a fax item, specify a file that contains both a fax and a confirmation prompt. The confirmation prompt is a voice recording that describes the content of the fax.

Block with which you associate fax items

You can associate fax items only with the Fax Select block. Also, you can associate only one fax item with the Fax Select block. For every fax in an application, you need a Fax Select block.

How you associate a fax item

You associate a fax item in the same way that you associate a voice item. To associate a fax item, you select its file name or type the file's ID in the appropriate box.

Fax Item	ID	
directions ▼	1006	Edit...

See also

For information about voice items, see Chapter 6, "Working with voice recordings."

For information about fax items, see Chapter 7, "Working with faxes."

Why you customize outputs and lines

Introduction

When you customize the outputs and lines of blocks, you determine whether the outputs and lines should appear in the application window. When you customize lines and outputs, you change how the content of an application looks.

How you customize outputs and lines

You customize outputs by hiding them. You customize lines by stubbing them.

Hiding outputs

For example, a Menu block has outputs for nine menu keys. If an application uses only two menu keys, then you can ensure that the outputs for only those keys show in the application window. You hide the outputs for the remaining seven menu keys.

This example of a Menu block shows all nine of its outputs.
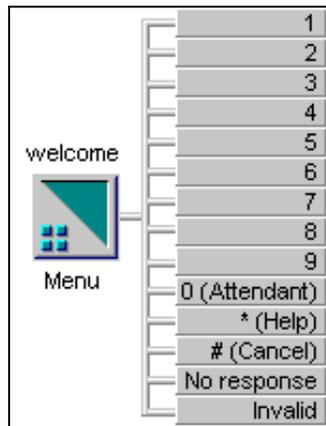
The following example of a Menu block shows only two of its nine outputs.
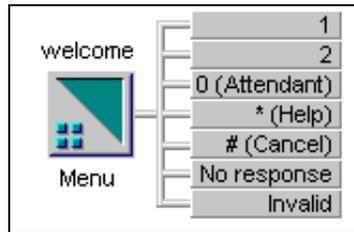
Stubbing lines

A line is full length when it connects one block to another block. If the blocks are far apart, then the line that joins them is usually long and hard to follow. You can shrink, or stub, the line. When you stub a line, a label appears beside a block's output and indicates the block to which the first block connects.
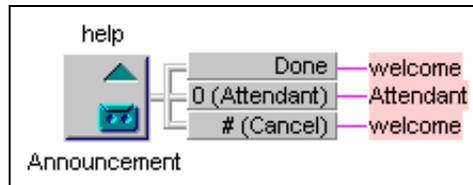
Benefits of customizing outputs and lines

When you hide outputs and stub lines, you create a clear, uncluttered application.

More room

If you hide a block's outputs, then that block takes up less space in the application window. Therefore, you have more room to place and arrange other blocks.

More tidy

When lines intersect, the application window looks cluttered.
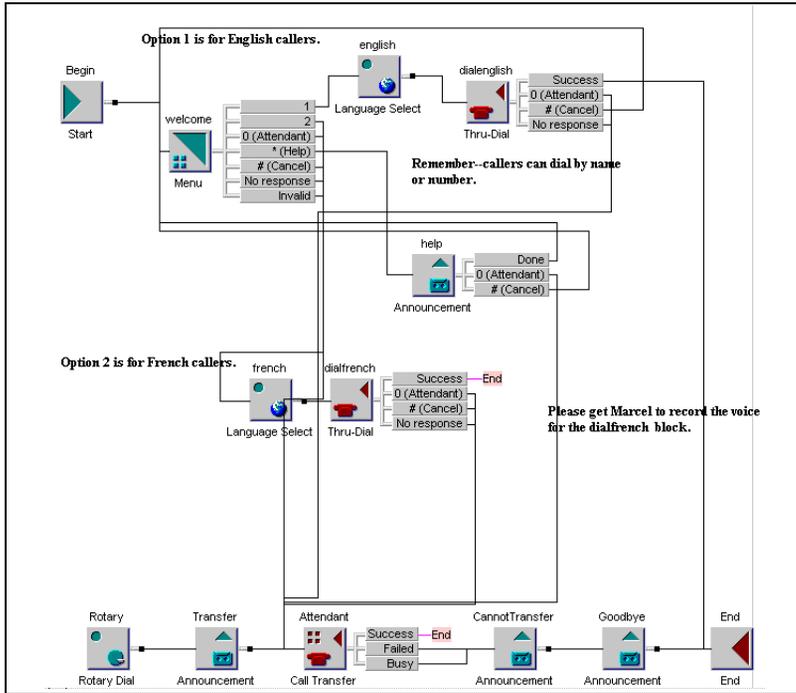
Stubbed lines tidy a window and let you easily see the blocks that connect.
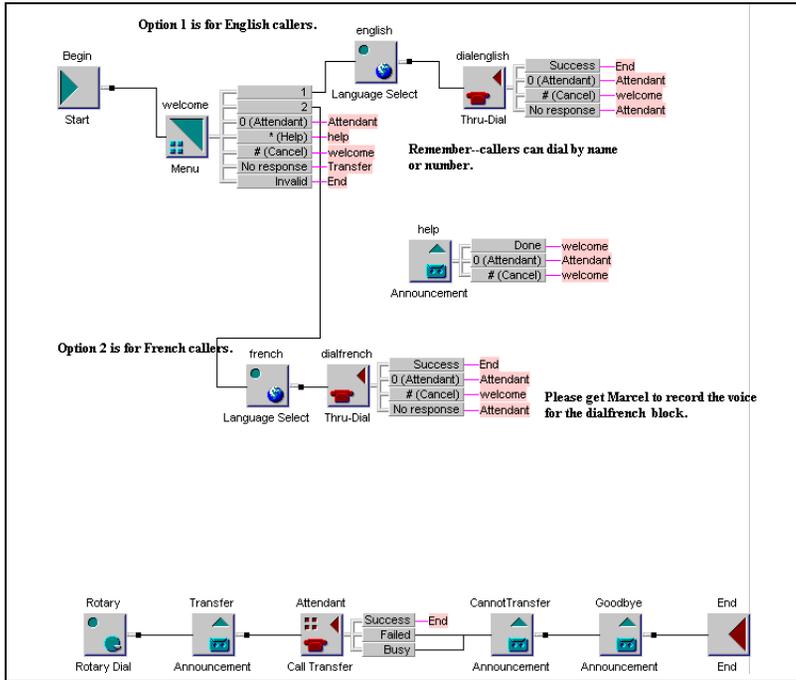
Section B: Connecting blocks

In this section

Basics of connecting blocks

Introduction

The basics teach you how to add content to applications by moving and connecting blocks.

Pink border

A pink border appears around a block after you move it into an application. The border indicates that you need to configure the block, connect it, or both. To the right of a block, you see one or more outputs. Connect outputs to other blocks to set the path that callers take through the application. When two blocks are connected, a line joins them. The pink border disappears after you finish connecting and configuring a block.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window

To move a block from the palette to an application

1 In the palette, click the appropriate tab:

- Basic tab

- System tab

- Imported Applications tab

2 Click a block and, while you press the mouse button, drag the block into the application window.

Result: The Add Block dialog box appears.

3 In the Enter block name box, type a name to identify the block.

4 Click OK to see the block in the application window and to return to the main window.

To connect a block to another block

1   In the application window, click a block's output.

2   Click the block to which you want to connect.

To connect a block to another block with a collapsed line

1   In the application window, click a block's output.

2   Right-click the block to which you want to attach the first block.

To connect multiple blocks to another block

1   In the application window, hold down the Shift key and then click the output of each block that you want to connect to another block.

2   Click the block to which the others should connect.

To see the outputs of a block

1   In the application window, click the block that you want to open.

2   On the Edit menu, click Block Properties.

3   Click the Outputs/Notes tab to see the block's output.

4   Click OK to return to the application window.

To drag a block

1   Click the block that you want to move, keeping the mouse button pressed.

2   Drag the block to the area of the application that you want to see.

See also

For information about connecting blocks, see "About connecting and configuring blocks" on page 184.

For information about outputs, see "Parts of blocks" on page 90.

Editing blocks

Introduction

When you edit blocks, you copy, cut, paste, delete, and rename them. When you paste a block, you must know how to resolve a name conflict with another block. Keep track of your edits by adding notes to individual blocks.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window

To copy a block

1   In the application window, click the block that you want to copy.

2   On the Edit menu, click Copy.

Note: The copied block goes to the clipboard so you can paste it.

See also

For information about how to reuse blocks, see .

To cut a block

1   In the application window, click the block that you want to cut.

2   On the Edit menu, click Cut.

Note: The cut block goes to the clipboard so you can paste it.

To paste a block

1   On the Edit menu, click Paste.

2   Move the pointer (+) to where you want to paste the block, and click.

> **ATTENTION!**   Sometimes when you attempt to paste a block, the Block Name Conflict dialog box appears because a block already exists with the same name. You must change the name of the block that you want to paste.
>
> If you paste a block in another application, then the block's associated voice items or fax items are also pasted.

To resolve a name conflict for a block

1   In the Block Name Conflict dialog box, ensure that Default name is selected to use the name assigned by Application Builder, then go to step 4.

2   To define a new name for the block, ensure that New name is selected.

3   In the New name box, type a name to identify the block. Go to step 5.

4   Click Change All to enable Application Builder to assign names to all the blocks that are to be pasted and to return to the main window.

5   Click OK to rename the block.

   Result: If you paste only one block, you return to the main window. If you paste more than one block, go to step 6.

6   Repeat steps 2, 3, and 5.

Note: You see the Block Name Conflict dialog box when you copy a block in your application's window and then try to paste it in the same window. Resolve the block's name conflict so that you can paste the block in the application.

To delete a block

1   In the application window, click the block that you want to delete.

2   On the Edit menu, click Delete.

To rename a block

1 In the application window, click the block that you want to rename.

2 On the Edit menu, click Rename.

Result: The Rename Block dialog box appears.

3 In the Enter block name box, type a new name for the block.

4 Click OK to change the block's name and to return to the main window.

To add notes to a block

1 In the application window, click the block to which you want to add notes.

2 On the Edit menu, click Block Properties.

3 Click the Outputs/Notes tab.

4 In the Notes box, type any additional information about the block.

5 Click OK to return to the main window.

Note: These notes print out when you print a block's details.

Working with lines and outputs

Introduction

You can reroute lines and connect multiple blocks. When you hide the outputs of a block, you decrease the amount of space it takes in an application. When you collapse the lines between blocks, you reduce the clutter in an application.

To select more than one block, line, or output at the same time

Hold down the Shift key and then click each block, line, or output that you want to select in the application window.

Tip: You can also use the cursor to draw a box around the blocks, lines, or outputs that are close together.

To show the output of a block

1   In the application window, click the block with the output that you want to show.

2   On the Edit menu, click Hide/Show Outputs and keep your mouse button pressed.

3   From the submenu, select the output's name or Goto (for an output that is a line with a square at its end) so that a check mark appears beside it.

To hide the output of a block

1   In the application window, click the block with the output that you want to hide.

2   On the Edit menu, click Hide/Show Outputs and keep your mouse button pressed.

Tip: You can also access the Hide/Show Outputs submenu by right-clicking on a block.

3   From the submenu, select the output's name or Goto (for an output that is a line with a square at its end) so that the check mark beside it disappears.

To adjust the line that connects two blocks

1   Double-click the line.

2   Click a handle and, while pressing the mouse button, drag the handle in the direction that you want the line to move.

To readjust the line that connects two blocks

1   Click the line that you want to readjust.

2   On the Edit menu, click Reroute Line.

To collapse the line that connects two blocks

1   Click the line that you want to collapse.

2   On the Edit menu, click Stub/Restore Line.

To restore the line that connects two blocks

1   Click the collapsed line that you want to restore.

2   On the Edit menu, click Stub/Restore Line.

Section C: Configuring blocks

In this section

About basic blocks

Basic blocks provide general functionality in applications, such as playing voice recordings and transferring calls. Customize these blocks for each application.

Opening a block

Introduction

Open a block to configure it or to see its properties and outputs.

Getting there

CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window

To open a block

1   Click the block that you want to open.

2   On the Edit menu, click Block Properties.

3   Click OK to return to the main window.

   Tip: You can also double-click a block to open it.

Configuring the Announcement block

Introduction

Use the Announcement block to play voice—either a system prompt or a voice item—in an application. You can also specify how many times the announcement plays and which keys on the phoneset can interrupt the announcement.

Menu keys are labeled 1–9 on your phoneset. If the Announcement block is configured to let callers interrupt an announcement by pressing menu keys, you can also configure key buffering. Key buffering affects the block that comes after an Announcement block, unless the next block is another Announcement block.

An Announcement block always stops the key buffering initiated by a preceding Announcement block. For example, suppose that two Announcement blocks are joined. Both blocks are interruptible by menu keys and have key buffering configured. Therefore, a caller can interrupt the first announcement and then be taken to the second announcement. Then, the caller has to start listening to the second announcement before being able to interrupt it.

A pink border appears around a block after you move it into an application. The border indicates that you need to configure the block, connect it, or do both. To the right of a block, you see one or more outputs. You connect outputs to other blocks to set the path that callers take through the application. When two blocks are connected, a line joins them. The pink border disappears after you finish connecting and configuring the block.

How you configure the Announcement block

Follow these procedures to configure the Announcement block:

1. To define a voice item as the announcement.

2. To define a system prompt as the announcemt.

3. To define how many times the announcement plays.

4. To define key handling for the announcement.

Getting there CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder >
application window > Announcement block
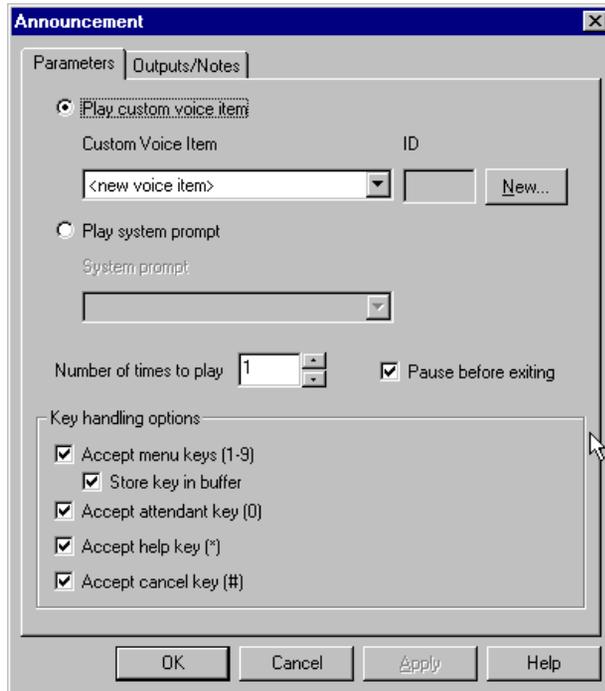
To define a voice item as the announcement

1 Select Play custom voice item.

2 From the Custom Voice Item list, select the voice item that you want to play
as the announcement.

Tip: You can change a selected voice item by clicking Edit. You can also
create a voice item if you select <new voice item> from the Custom Voice
item list, and then click New.

To define a system prompt as the announcement

1   Select Play system prompt.

2   From the System prompt list, select the prompt that you want to play as the announcement.

To define how many times the announcement plays

1   In the Number of times to play box, type a number between 1–10.

2   To let callers hear a pause after the last play of the announcement, ensure that the Pause before exiting box is checked.

To define key handling for the announcement

1   Double-click the Announcement block.

2   To let callers stop the announcement with a menu key and go to the following block, ensure that the Accept menu keys (1–9) box is checked.

3   To let callers skip ahead in the application by applying the pressed menu key to both the Announcement block and the next block, ensure that the Store key in buffer box is checked.

4   To let callers stop the announcement with the attendant key (0) and go to the following block, ensure that the Accept attendant key (0) box is checked.

5   To let callers stop the announcement with the help key (*) and go to the following block, ensure that the Accept help key (*) box is checked.

6   To let callers stop the announcement with the cancel key (#) and go to the following block, ensure that the Accept cancel key (#) box is checked.

7   Click OK to return to the main window.

Configuring the Call Transfer block

Introduction

Use the Call Transfer block to route callers to the default attendant or to a specific extension either on- or off-switch. If callers transfer to an extension that is busy or unanswered, you can still route them to the default attendant. You define that attendant in the Messaging Administration program.

How you configure the Call Transfer block determines what callers experience after a call transfer. If the extension is valid, callers hear ringing before the application terminates. If no one answers, ensure that callers reach either CallPilot or the default attendant. If the extension is busy, callers hear a prompt before exiting the Call Transfer block on the Busy output. Callers reach CallPilot if the extension is forwarded. If the extension is not forwarded, ensure that callers reach the attendant. If the transfer fails, if the extension is not in service and has no mailbox, or if the extension is restricted, then callers hear a prompt before exiting on the Failed output. For a failed transfer, direct callers to CallPilot or the default attendant.

How to configure the Call Transfer block

Follow these procedures to configure the Call Transfer block:

1. To define the call transfer greeting

2. To define call transfer options

Getting there CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder >
application window > Call Transfer block
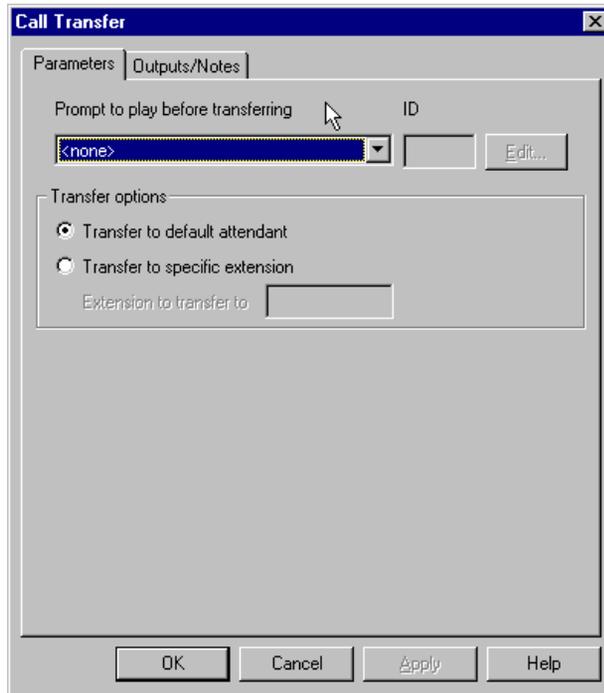
To define the call transfer greeting

1   Double-click the Call Transfer block.

2   To define the system prompt as the call transfer greeting, from the Prompt
to play before transferring list, select <default system prompt>, which plays
"Transferring to an attendant, one moment please."

3   To define no greeting for call transfer, from the Prompt to play before
transferring list, select <none>.

4   To define a voice item as the call transfer greeting, from the Prompt to play
before transferring list, select the item's name.

Tip: You can change a selected voice item by clicking Edit. You can also
create a voice item if you select <new voice item> from the Prompt to play
before transferring list, and then click New.

To define call transfer options

1 Double-click the Call Transfer block.

2 To transfer callers to a default attendant, ensure that Transfer to default attendant is selected. Then go to step 6.

3 To transfer callers to a specific extension, ensure that Transfer to specific extension is selected.

4 Click the Extension to transfer to box.

5 Type the extension number to which callers should transfer.

6 Click OK to return to the main window.

Note: A successful call transfer ends the application.

Configuring the Date Control, Day Control, and Time Control blocks

Introduction

Configure the Date Control and Time Control blocks to define periods of time by calendar dates and by a 24-hour clock. You configure the Day Control block to check every day of the week against a holiday schedule. Holidays take priority over weekdays.

How to configure the Date Control, Day Control, and Time Control blocks

Folllow these procedures to configure the Date, Day and Time Control blocks:

1. To define a date period for the Date Control block

2. To configure the Day Control block

3. To define a time period for the Time Control block

Defining a date period for the Date Control block

Use the Date Control block to route calls to different blocks according to a date period, which can consist of up to five separate subperiods. You also use the Date Control block with the Time Control block to route calls during specific time periods. For example, a university might want to activate services during certain hours only on the dates that registration takes place.

If the current date falls within any one of the specified subperiods, the application considers the current date to belong to the date period. If you require additional date periods, you can connect Date Control blocks.

Getting there   CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder >
application window > Date Control block

To define a date period for the Date Control block

1   Double-click the Date Control block.

2   In a box under From (mm/dd), type the month and the day on which the
date subperiod begins.

3   In the corresponding box under To (mm/dd), type the month and the day on
which the date subperiod ends.

4   Repeat steps 1 and 2 to define another date subperiod.

5   Click OK to return to the main window.

Tip: You can include a date in more than one subperiod and, therefore,
overlap subperiods. Use a Date Control block to define departmental
holidays that differ from organizational holidays.

Configuring the Day Control block

Use the Day Control block to route calls to different blocks according to the day. You can route calls for each day of the week as, well as for holidays. You can also use the Day Control block with the Time Control block to route calls during specific time periods.

The holiday schedule set in the Messaging Administration program determines which days are holidays. A holiday has priority over any day of the week unless you configure the Day Control block to skip holidays.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window > Day Control block
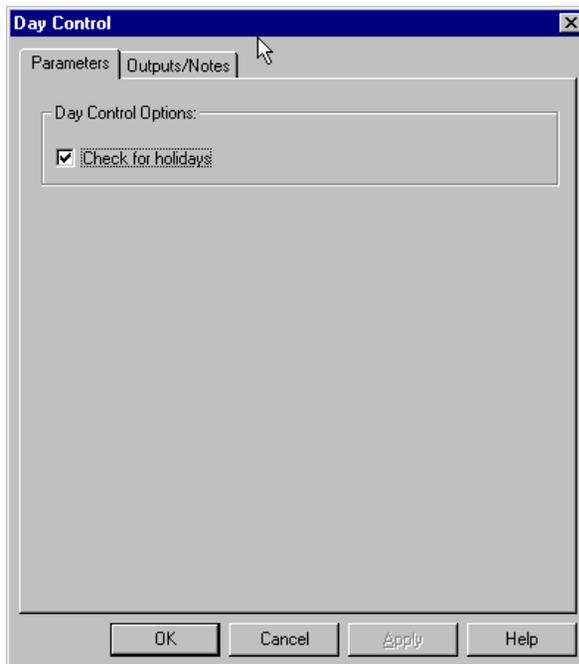
To configure the Day Control block

1   Double-click the Day Control block.

2   To ensure that the day of the week is checked against the holiday schedule, make sure that the Check for holidays box is checked.

Note: If the Check for holidays box is not checked, the Day Control block has no Holiday output.

3   Click OK to return to the main window.

Defining a time period for the Time Control block

Use the Time Control block to route calls to different blocks according to a 24-hour time period consisting of up to five separate subperiods. Most often, you use the Time Control block with the Day Control block to send callers to the most appropriate area of the application. For example, during a company's business hours, callers reach a live attendant; during a company's nonbusiness hours, callers reach an auto attendant.

A subperiod can begin at 19:00 at night and go until 05:00 the following morning. The system interprets the earlier time (05:00) as a reference to the next day. If you require additional time periods, you can connect Time Control blocks.

Getting there CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder >
application window > Time Control block

To define a time period for the Time Control block

1   Double-click the Time Control block.

Note: The Time Control block uses a 24-hour clock.

2   In a box under From (hh:mm), type the hour and minute that subperiod
starts.

3   In the corresponding box under To (hh:mm), type the hour and minute that
the time subperiod ends.

4   Repeat steps 1 and 2 to define another time subperiod.

5   Click OK to return to the main window.

Note: You can include a time in more than one subperiod and, therefore,
overlap subperiods.

Configuring the Fax Select block

Introduction

Use the Fax Select block to set up a fax-on-demand application. To set up a fax-on-demand application, you need to understand how the system delivers faxes, the fax options that you must configure in the session profile, and how you use the Fax Select block.

The system sends faxes using either callback or same-call delivery. In the session profile, configure the type of fax delivery that the system uses and define the session profile in the SDN Table. As its name suggests, caller's choice delivery enables callers to choose between callback and same-call delivery.

Callback and same call-delivery

With same-call delivery, the caller—who must be at a faxphone—selects faxes and then receives the selected faxes. Same-call delivery avoids billing problems because the caller pays any long distance charges. With callback delivery, the caller provides a fax machine number to which the system delivers faxes. So the system knows how to prompt callers for the number, configure its type (for example, national). This callback number must validate against the restriction/permission list (RPL), which you also configure in the session profile. For example, a restriction could prevent the system from calling back an international faxphone number. With caller's choice delivery, the system asks callers to indicate whether they want either same-call or callback delivery.

Configuring other options

Besides the type of fax delivery and the RPL, you must configure some other fax options in the session profile. Select whether an optional system cover page sends with callback faxes. As well, you can add information, such as a logo, to the page. Specify both the maximum number of faxes and the maximum number of fax pages that a caller can receive during one call. When a caller reaches the first maximum number in a fax-on-demand application, a warning message plays and the application takes the caller to the block that you configure. Often, that block is a Fax Send block.

The Fax select block

Each Fax Select block contains only one fax item. Therefore, you must include a Fax Select block for each fax that you want in your application. In turn, callers can assemble multiple faxes to transmit in a single call.

Various factors affect how the Fax Select block behaves. When callers reach the block, they might hear an optional confirmation prompt that describes the fax. After selecting faxes, callers enter information depending on the type of fax delivery configured. For example, with callback delivery, the application asks callers to enter, at least, a faxphone number.

Fax-on-demand application

This fax application can send faxes using one of two methods. With one method, your application can include the Fax Send block. For example, you can attach a Menu block to the Done output of Fax Select. Then, you can give callers the choice to select another fax by pressing 1 or to receive the current fax by pressing 2. If callers press 2, they reach the Fax Send block.

With the other method, your application can activate default delivery by sending callers out of the application. For example, passing callers to a block (such as Thru-Dial or Call Transfer) that does not let them return to the application triggers fax delivery. Default delivery also occurs if the caller hangs up or if an error occurs in the application. Most often, you should use the Fax Send block.

Callers are done after any of the following conditions: they select the fax item, the fax item is already selected, or the fax item is empty. To let callers hear a prompt before selecting another fax, you can connect the Done output to a Menu block or to an Announcement block. You can also see where callers go if they reach either the maximum number of faxes or the maximum number of fax pages set in the session profile.

Getting there CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder >
application window > Fax Select block
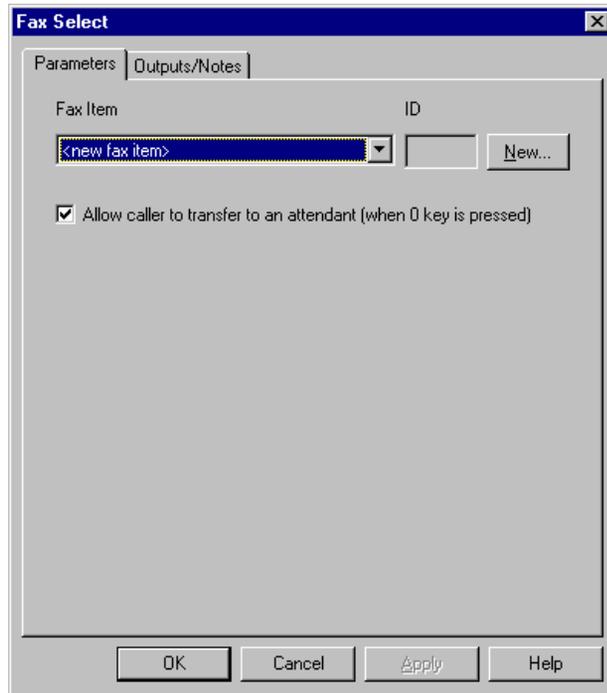
To configure the Fax Select block

1 Double-click the Fax Select block.

2 From the Fax item list, select the fax item that you want to associate with
the Fax Select block.

3 To enable callers to transfer to an attendant from the Fax Select block,
ensure that the Allow caller to transfer to an attendant (when 0 key is
pressed) box is checked.

4 Click OK to return to the main window.

   Tip: To change a selected fax item, click Edit. To create a fax item, select
   <new fax item> from the Fax item list, and then click New.

Configuring the Language Select block

Introduction

Use the Language Select block to change the current language for system prompts without affecting voice items, such as those used in an announcement.

The selected language affects all the blocks that follow it in the application and all system programs (for example, Express Voice Messaging). The selected language remains active until another Language Select block appears.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window > Language Select block

To configure the Language Select block

1   Double-click the Language Select block.

2   From the System prompting language list, select the language in which you want system prompts to play.

3   Click OK to return to the main window.

Note: The Language Select block affects only system prompts. It does not affect voice items.

See also

To learn more about configuring the Language Select block, see .

Configuring the Menu block

Introduction

Use the Menu block to give callers options in an application. You specify the voice items used by the menu. The menu uses voice items to

- describe options associated with the phoneset keys

- prompt callers who give no response

- notify callers if they press an invalid key

- set the maximum number of times that callers can give no response and press invalid keys

To use the Menu block, combine it with blocks such as the Announcement block, Thru-Dial block, Call Transfer block, and Language Select block. The Announcement block enables you to provide extra help information for a menu. You can also configure the Announcement block, Menu block, and Time Control block so that callers hear the appropriate greeting for the time of day that they access the menu. Use a Call Transfer block or Thru-Dial block with a Menu block to set up multiple instances of call routing. If you use the Language Select block with the Menu block, you ensure that callers can hear the rest of the menu in the language of their choice.

To make a menu valid, you must connect at least one key to a block. By connecting a key to a block, you also make that key valid. If you do not connect a key to a block, the application treats that key as invalid.

How to configure the Menu block

Follow these procedures to configure the Menu block:

1. To define the voice item that describes menu choices.

2. To define how a menu deals with no response.

3. To define how a menu deals with invalid responses.

Getting there CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder >
application window > Menu block

To define the voice item that describes menu choices

1 Double-click the Menu block.

2 From the Menu choices greeting list, select the voice item that describes
the menu keys and their services.

Tip: You can change a selected voice item by clicking Edit. You can also
create a voice item if you select <new voice item> from the Menu choices
greeting list, and then click New.

To define how a menu deals with no response

1   Double-click the Menu block.

2   To give callers another opportunity to respond, ensure that the Allow retries after no response box is checked.

3   In the Number of no response retries box, type the number of times that the system asks callers for a response before the system terminates them from the menu.

4   From the No response prompt list, select the voice item that asks callers to give a response.

> **Tip:** You can change a selected voice item by clicking Edit. You can also create a voice item if you select <new voice item> from the No response prompt list, and then click New.

To define how a menu deals with invalid responses

1   Double-click the Menu block.

2   To let callers give a valid response after giving an incorrect response, ensure that the Allow retries after invalid response box is checked.

3   In the Number of invalid response retries box, type the number of times that callers can press undefined menu keys before the system terminates them from the menu.

4   To define the system prompt as the invalid response prompt, from the invalid response list, select <default system prompt>, which plays "<<beep>> That selection is not recognized. Please make another choice."

5   To define a voice item as the invalid response prompt, from the invalid response list, select the item's name.

6   Click OK to return to the main window.

> **Tip:** You can change a selected voice item by clicking Edit. You can also create a voice item if you select <new voice item> from the Invalid response prompt list, and then click New.

Configuring the Password Check block

Introduction

Use the Password Check block to control access to specific areas of an application by prompting callers to enter a password before they can continue.

You can place Password Check blocks anywhere in the application. For example, you can connect a Thru-Dial block that allows international calls to a Password Check block. When you do so, only callers who enter the correct password can place international Thru-Dials.

The system does not display a password after you define it. Therefore, you must remember passwords and distribute them to appropriate callers.

In the session profile, configure the maximum number of invalid password entries and the maximum number of entry attempts allowed. Without these limits, hackers can repeatedly try to break through the Password Check block.

To configure the Password Check block

Follow these procedures to configure the Passwork Check block:

1. To define the password check greeting.

2. To define passwords.

Getting there CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder >
application window > Password Check block

To define the password check greeting

1   Double-click the Password Check block.

2   To define the system prompt as the password check greeting, from the
Password prompt list, select <default system prompt>, which plays
"Password?"

3   To define no greeting for password check, from the Password prompt list,
select <none>.

4   To define a voice item as the password check greeting, from the Password
prompt list, select the item's name.

Tip: You can change a selected voice item by clicking Edit. You can also
create a voice item if you select <new voice item> from the Password
Prompt list, and then click New.

To define passwords

1   Double-click the Password Check block.

2   To define the number of times callers can enter an undefined password without exiting from the Password Check, type the number in the Number of invalid response retries box.

3   Ensure that one of the Password check boxes is checked.

4   In the corresponding Password text box, type the password.

5   In the corresponding Confirmation text box, type the password again.

6   To define another password, repeat steps 2 through 4.

   Note: You must define at least one password.

7   Click OK to return to the main window.

   Note: The minimum password length is governed in Security Administration.

See also

For information about the Start block, see "Start block" on page 134.

Configuring the Thru-Dial block

Introduction

Use the Thru-Dial block to create an automated attendant that transfers callers to the DN that they enter.

You can also use restriction/permission lists to define the numbers that callers can enter. For example, an RPL can prevent callers from placing a long distance call, even if the callers enter the correct number.

The Messaging Administration program determines whether callers can use name dialing. The program can override the dialing options that you configure for the Thru-Dial block. If you configure name dialing for only the Thru-Dial block and Messaging Administration does not let callers use name dialing, then callers hear a prompt when they reach the block, and they exit on its Cancel output. If you configure both name dialing and number dialing for the Thru-Dial block and Messaging Administration does not let callers use name dialing, then callers can use only number dialing with the block. The system prompt associated with number dialing plays in place of any custom voice item that you have configured.

You can define multiple Thru-Dial blocks to satisfy callers with different dialing restrictions. For instance, you can have two Thru-Dial blocks attached to two menu keys. One Thru-Dial lets a company's customers dial employees by name. The other Thru-Dial lets staff dial each other and place local calls.

How to configure the Thru-Dial block

Follow these procedures to configure the Thru-Dial block:

1. To define the Thru-Dial greeting.

2. To define dialing options for Thru-Dial.

3. To define a restriction/permission list for Thru-Dial.
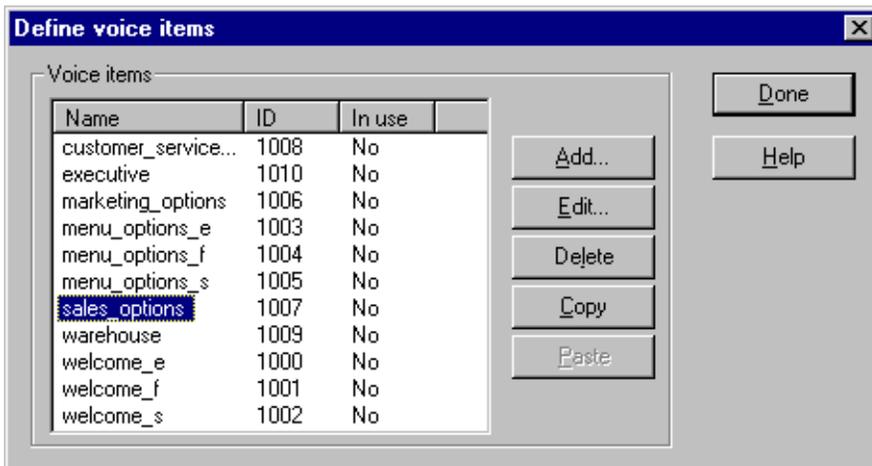
Getting there   CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window >Thru-Dial block
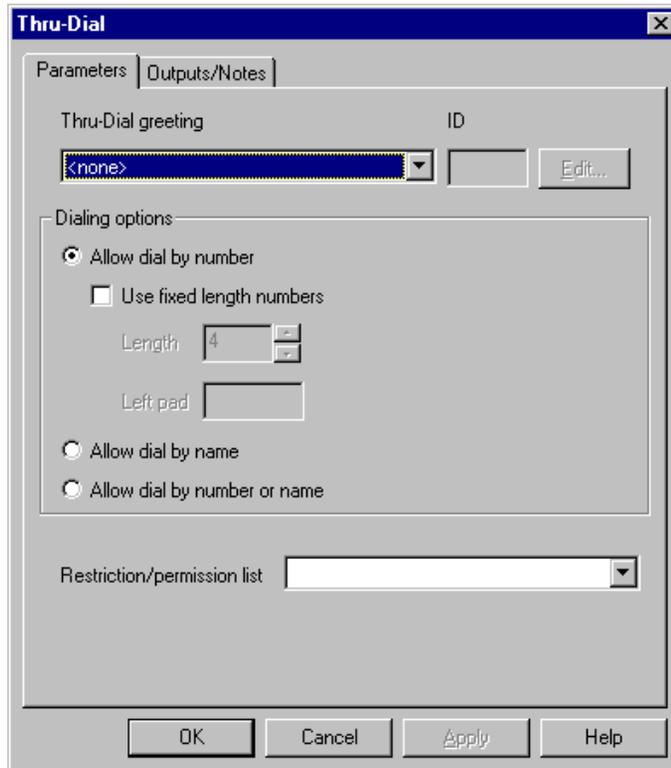
To define the Thru-Dial greeting

1   Double-click the Thru-Dial block.

2   To define a system prompt as the Thru-Dial greeting, from the Thru-Dial greeting list, select <default system prompt>, which plays a prompt appropriate for the block's configuration.

3   To define no greeting for Thru-Dial, from the Thru-Dial greeting list, select <none>.

4   To define a voice item as the Thru-Dial greeting, from the Thru-Dial greeting list, select the item's name.

5   Click OK to return to the main window.

Tip: You can change a selected voice item by clicking Edit. You can also create a voice item if you select <new voice item> from the Thru-Dial greeting list and then click New.

To define dialing options for Thru-Dial

1   Double-click the Thru-Dial block.

2   To let callers dial people by only their extension numbers, ensure that Allow dial by number is selected. Then go to step 4.

3   To let callers dial people by only their names, ensure that Allow dial by name is selected. Then go to step 7.

4   To let callers dial people by both their extension numbers and their names, ensure that Allow dial by number or name is selected. Then go to step 7.

5   To ensure callers enter numbers of a particular length, ensure that the Use fixed length numbers box is checked.

6   In the Length box, type the number of digits (0–13) callers must enter.

7   To specify a string of digits that prefix the value specified in the Length box, in the Left pad box, type the digits.

8   Click OK to return to the main window.

To define a restriction/permission list for Thru-Dial

1   Double-click the Thru-Dial block.

2   From the RPL, select the list that monitors calls made through the Thru-Dial block.

3   Click OK to return to the main window.

About system blocks

System blocks represent existing system applications known as services. Use these blocks to link your applications to services.

Configuring the Express Voice Messaging block

Introduction

Use the Express Voice Messaging block to transfer callers to the Express Voice Messaging service. This service enables callers to leave a voice message in a specific mailbox or a mailbox of their choice.

If callers have selected faxes in the current call, the Express Voice Messaging block asks them to accept faxes already selected for same-call delivery, or to continue with the Express Voice Messaging block and lose the faxes.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window > Express Voice Messaging block
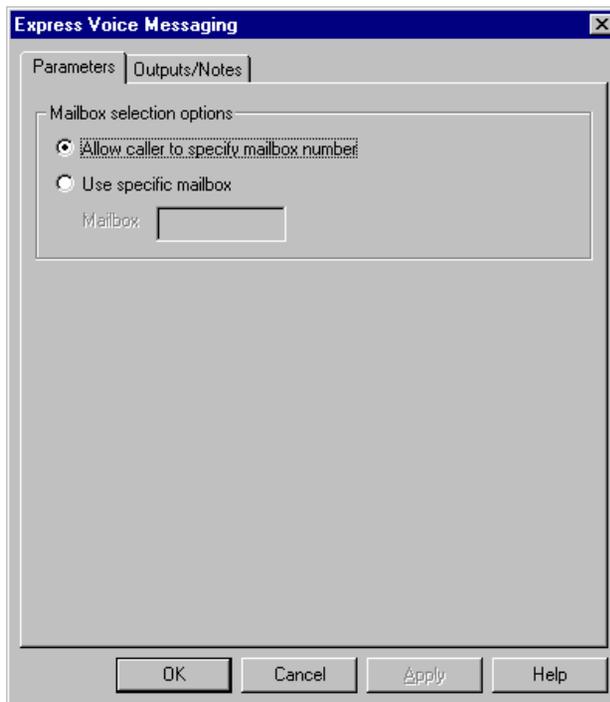
To configure the Express Voice Messaging block

1   Double-click the Express Voice Messaging block.

2   To let callers specify the mailbox in which they want to leave a voice message, ensure that Allow caller to specify mailbox number is selected. Then go to step 5.

3   To specify the mailbox in which callers leave all voice messages, ensure that Use specific mailbox is selected.

4   In the Mailbox box, type the number of the mailbox to which all voice messages deliver.

5   Click OK to return to the main window.

See also

To learn more about configuring the Express Voice Messaging block, see "Custom Commands block" on page 150.

Configuring the Express Fax Messaging block

Introduction

Use the Express Fax Messaging block to transfer callers to a service that allows them to leave a fax message in a specific mailbox or a mailbox of their choice. To use the service, callers must call from a faxphone.

If callers enter the Express Fax Messaging block after they select faxes for same-call delivery, the system asks callers if they want to continue and lose the faxes, or to receive the faxes instead.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window > Express Fax Messaging block
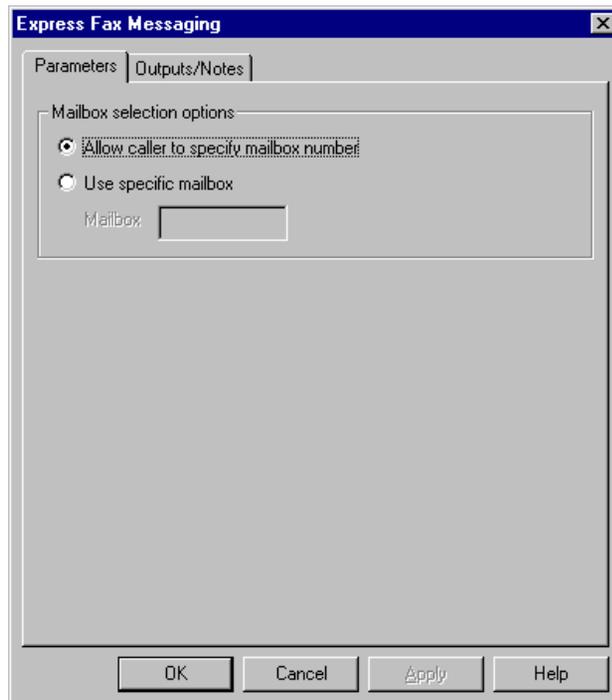
To configure the Express Fax Messaging block

1   Double-click the Express Fax Messaging block.

2   To let callers specify the mailbox in which they want to leave a fax message, ensure that Allow caller to specify mailbox number is selected. Then go to step 5.

3   To specify the mailbox in which callers leave all fax messages, ensure that Use specific mailbox is selected.

4   In the Mailbox box, type the number of the mailbox to which all fax messages deliver.

5   Click OK to return to the main window.

Configuring the Speech Activated Messaging block

Introduction

Use the Speech Activated (SA) Messaging block to transfer callers to the SA Messaging service. This service enables callers to use speech recognition to retrieve and manipulate mailbox messages. The service requires speech recognition channels dedicated in the SDN Table.

You do not connect the SA Messaging block. However, you must configure it if you want callers to use paced speech recognition. Paced speech recognition lets callers speak one digit at a time. Callers can say a mailbox number as "7, (pause), 6, (pause), 2, (pause), 4", instead of saying it as "7624."

Since this messaging block offers a service, it causes the application to end. If callers have selected faxes in the current call, this block asks them to accept faxes already selected for same-call delivery, or to continue with this block and lose them.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window > Speech Activated Messaging block

To configure the Speech Activated Messaging block

1. Double-click the SA Messaging block.

2. Ensure that the Use paced speech recognition box is checked.

3. Click OK to return to the main window.

C h a p t e r 6

Working with voice recordings

In this chapter

Section A: About working with voice recordings

In this section

Types of voice recordings

Introduction

Voice recordings let you construct applications from the callers' perspective. Callers interact with applications by listening and responding to voice.

Three types of voice recordings

CallPilot supports three types of voice recordings: system prompts, voice items, and customized prompts. You use all three types of voice recordings in Application Builder.

System prompts

System prompts are voice recordings that come with the system. A well-known system prompt is "Login incorrect. Please try again."

You cannot delete any system prompts. However, you can use System Prompt Customization to edit some system prompts.

Voice items

Voice items are custom-made voice recordings. You can use a phoneset to record your own voice items, or you can import a sound file in WAV format. An example of a voice item is "Welcome to ABC Company. For information in English, press 1. For information in French, press 2."

Customized prompts

Customized prompts are system prompts that you have replaced, or customized, with a phoneset recording or a sound file in WAV format. You can customize ten system prompts in System Prompt Customization. You then replace a system prompt with a voice item.

You can customize only one system prompt in Application Builder. For the Announcement block, you can select the "Goodbye" system prompt or customize it to say "Goodbye. Thank you for calling ABC Company." If a customized prompt exists for "Goodbye," you cannot select the system prompt.

How to add voice to an application

To include a system prompt, voice item, or customized prompt in an application, associate it with a block.

You can associate voice with various blocks, such as the Announcement block, Call Transfer block, or Thru-Dial block. You can even associate more than one voice item or system prompt with some blocks. For example, the Menu block needs voice to describe the phoneset keys. This block needs more voice to prompt callers to press those keys.

Default names and IDs

Whenever a conflict occurs, Application Builder proposes default names and IDs for the voice items you want to paste. Use the default names and IDs to save time. You can always change the names later.

See also

For information about associating voice with a block, see Chapter 5, "Working with blocks."

How to use voice created for Meridian Mail Voice Services

Introduction

You can reuse voice created for Meridian Mail Voice Services so that you do not waste time re-creating existing announcements and voice prompts.

You can migrate the following item from Voice Services to Application Builder:

■ announcements

■ fax items

■ menus

This section describes how to use migrated announcements and menus.

Contents of a menu

Each menu from Voice Services contains voice prompts for

■ the greeting

■ caller choices

■ the 1–9 menu keys

How to identify migrated voice

In general, "Migrated_" prefixes identify both announcements and menus for migrated voice. The prefix indicates a service that was created in Meridian Mail Voice Services. Other prefixes indicate the type of migrated service. Names and IDs indicate the announcements and prompts themselves.

Menus
A migrated menu is identified in Application Builder by a prefix of "Migrated_Menu" and its ID from Voice Services. For example, a Voice Services menu with an ID of 64 appears as "Migrated_Menu64" in Application Builder. The description of the application is "Migrated from Menu Service 64."

Announcements

A migrated announcement is identified in Application Builder by a prefix of
"Migrated_Ann" and its ID from Voice Services. For example, a Voice Services
announcement with an ID of 65 appears as "Migrated_ANN65" in Application
Builder. The description of the application is "Migrated from Announcement
Service 65".

Within that file, you see the announcement with both a name (Announcement)
and an ID (1010).

Format of migrated voice

In Voice Services, you can use only announcements in multiple services. A voice
prompt can appear in only one service. However, in Application Builder,
announcements and voice prompts are in the same format as voice items.

Access

On the server, you access migrated announcements and the voice prompts of
menus in the same way that you access voice items.

Use

Voice items are compatible with all applications. For example, you can use the
same voice item in multiple applications just as you used an announcement in
multiple services. As a result, you now can use all your existing voice prompts in
multiple applications.

Applications that contain migrated voice

You can use migrated voice in new applications and in rebuilt applications that
existed in Meridian Mail Voice Services. Consider when to build both types of
applications.

New applications

You can build new applications that use migrated voice either before or after the
voice is migrated from Voice Services.

If you build new applications before migration, you save time. However, you can
complete the applications and use them only after migration.

Rebuilt applications

You can rebuild applications that use migrated voice either before or after the voice is migrated from Voice Services.

You save time if you rebuild applications before migration. However, you can complete the applications and use them only after migration.

You can do everything at once if you rebuild applications after migration. You can paste the voice into the applications during creation. Also, the migrated voice can help you remember what to rebuild.

See also

For information about migrated fax items, please see Chapter 7, "Working with faxes."

Section B: Working with voice recordings

In this section

Voice items

Creating a voice item

Create a voice item so you can associate a custom recording with a block.

Use the Voice Recorder toolbar to play and record voice with a phoneset.

The Voice Recorder toolbar
The Play button is enabled only when a recording already exists. Play always rewinds the recording to its beginning before playing it. When you record, you overwrite the last recorded voice.

Voice item name and ID

When you create a voice item, you define its name and ID.

Name
The name identifies the voice item by a unique word. The name can contain up to 30 characters.

Example: greeting

ID
The ID identifies the voice item by a unique number. The number can contain up to four digits and must be in the range from 1000–3000.

Example: 1038

When you use Voice Item Maintenance, you specify voice items by their IDs. To indicate the voice item that you want to listen to or edit, input its ID on the phoneset keypad.

Description of a voice item

You can use the description area to generate a script for a voice item. Type the exact wording of the item. Whatever information you enter as a description prints with the voice item's name and ID when you print details for the fax and voice items in an application.

Where voice items are saved

As soon as you save a voice item, it appears on the server. You can access the item from any client. You can also access the item remotely by phoneset using Voice Item Maintenance.

After you save a voice item

You can save a voice item with only a name and an ID. However, the item is empty because it contains no voice recording. You add voice by recording it with the phoneset or by importing a WAV file.

Record voice with a phoneset

If you click the Record button in Application Builder while you create a voice item, you connect to a phoneset. When you use a phoneset for recording, you

1   connect

2   record

3   disconnect

Connect

In the Specify Phoneset dialog box, you indicate which phoneset you want to use to record voice items. You must enter the telephone number in the same format as you dial it. If the phoneset sits on a desk beside you and you call people at surrounding desks by dialing extension numbers, then you dial the appropriate extension number. When the phoneset rings, you must answer it.

Record

After you click the Record button in the Voice Recorder dialog box, the system records what you speak into the phoneset. If you have a voice item already selected, recording overwrites that voice item.

Disconnect

After you record a voice item, you do not have to disconnect by hanging up. Instead, you can stay connected and record other voice items. Disconnect only when you are finished recording all the voice items you need.

Import sound files

To import prerecorded sound files into Application Builder, they must be in the correct format. You can import only 8-bit, 11-bit, 22-bit, or 44-bit sound files in WAV format, recorded at 22 050 kilohertz (kHz) and mono. Import files from anywhere on your client PC network.

How you create a voice item

Follow these procedures to create a voice item.

1. Defining a voice item.

2. Recording a voice item.

3. Importing a voice item.

Note: You can also create a voice item when you add a block to the application.

See also

For information about the content of a voice item, see Chapter 2, "Creating applications."

For information about Voice Item Maintenance and printing voice item details, see Chapter 10, "Maintaining applications."

Defining a voice item

Introduction

Define a voice item so that you can identify it on the server.

Getting there CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder >
application window

To define a voice item

1   On the Define menu, click Voice items... .

2   Click Add... .

Result: The Add voice item dialog box appears.
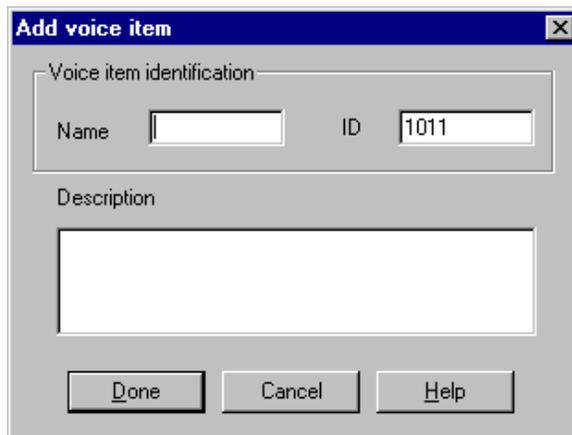
3   In the Name box, type a name to identify the voice item.

4   In the ID box, if you do not want to accept the default, type a number to
identify the voice item.

5   To include a description of the voice item, in the Description box, type
information about the item.

6   Click Done.

Recording a voice item

Introduction

Record a voice item by using a phoneset.

Getting there

CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window

To record a voice item

1   On the Define menu, click Voice items... .

Result: The Define voice items dialog box appears.

Name	ID	In use
customer_service...	1008	No
executive	1010	No
marketing_options	1006	No
menu_options_e	1003	No
menu_options_f	1004	No
menu_options_s	1005	No
sales_options	1007	No
warehouse	1009	No
welcome_e	1000	No
welcome_f	1001	No
welcome_s	1002	No

Define voice items

Voice items

Done
Help
Add...
Edit...
Delete
Copy
Paste

2   In the Define voice items dialog box, select the voice item you want to record.

3   Click Edit... .

4   Click Record... .

5   In the Specify Phoneset box, type the number of the phoneset you want to use for recording, and then click Dial.

6 Answer the phoneset when it rings.

7 Click Record.

8 Speak the content of the voice item.

9 Click Stop.

10 If you are satisfied with the recording, click Done, and go to step 12.

11 If you are not satisfied with the recording, repeat steps 7 to 10.

12 Hang up the phoneset.

13 Click Done.

14 Click OK.

15 Click Done until you return to the application window.

Importing a voice item

Introduction

Import a voice item to use the contents of a WAV file as the item.

Getting there   CallPilot System > System Administration > Service Administration >
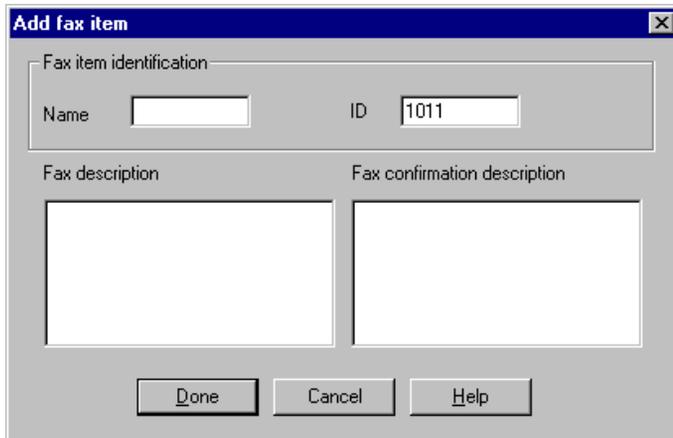Application Builder > application window

To import a voice item

1   On the Define menu, click Voice items... .

Result: The Define voice items dialog box appears.
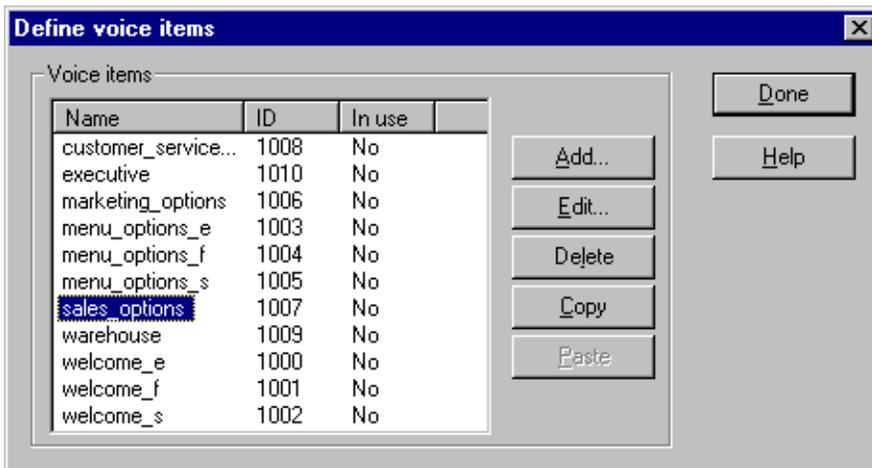
2   In the Define voice items dialog box, select the voice item into which you
want to import voice.

3   Click Edit... .

4   Click Import... .

5   Select the voice item that you want to import.

6   Click Open.

7   Click OK.

8   Click Done until you return to the application window.

Editing and deleting a voice item

Introduction

Because the information contained in voice items often changes, you must know
how to edit and delete voice items. By changing the content of some voice items
and removing other ones, you ensure callers always get the most up-to-date
information.

What you can edit and delete

You can edit or delete voice items. You cannot delete any system prompts, but
you can edit some of them.

How to edit and delete a voice item

Both Application Builder and Voice Item Maintenance (VIM) let you edit and
delete voice items. Use Application Builder to do any maintenance on voice
items when you are at the office. When you are away from the office, use VIM to
edit voice items on a phoneset.

IDs and VIM

You can print the details of all voice items in an application. These details
include the IDs of all voice items. When you know their IDs, you can use VIM.

Definition: Online updating

Online updating means that callers do not encounter edited items until after you
finish changing and saving them, and then finish saving and closing the
application in which they reside. Both you and callers must exit from the
application before it can update.

Example: Online updating

Suppose that you have to change the voice items that play for an announcement. Instead of three announcements (one for the morning, one for the afternoon, and one for after business hours), you want only two. You must have one announcement for business hours and another announcement for after hours.

A caller calls the application before you change the announcements. Since the caller accesses the application in the afternoon, she hears, "Good afternoon. Thanks for calling Book Bonanza. If you know the number of the department you want to reach, press 1. If you don't know the department's number, press 2."

While the caller interacts with the application, you use Application Builder to replace the morning and afternoon announcements with one announcement that plays during business hours: "Hello. Thanks for calling Book Bonanza. If you know the number of the department you want to reach, press 1. If you don't know the department's number, press 2."

While in the application, the caller is never aware of the changed announcements. After she hangs up, she realizes she must call Book Bonanza again because she forgot to ask about a book's availability. During the time it takes her to use the application and redial it, you change the announcements. Besides saving the announcements, you also save and exit from the application in which they reside. Only when the caller redials the application does she hear the new announcement for business hours.

Getting there   CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder >
application window
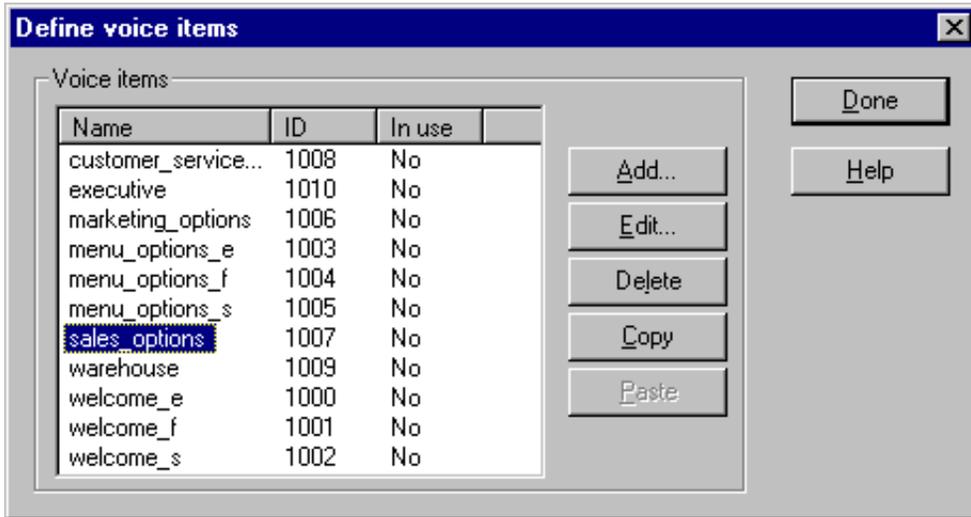
To edit a voice item

1   On the Define menu, click Voice items... .

2   In the Define voice items dialog box, select the voice item you want to edit.

3   Click Edit... .

Result: The Edit voice item dialog box appears.
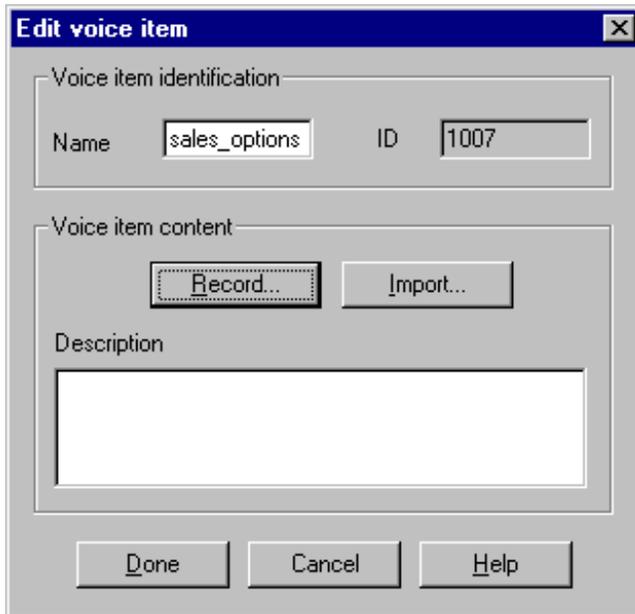
- **4**   In the Name box, select the existing name and then type a new one.

- **5**   In the Description box, select the existing text and then type new information about the item.

- **6**   Re-create the content of the voice item. See "To rerecord a voice item" and "To reimport a voice item" on the next pages.

To delete a voice item

- **1**   On the Define menu, click Voice items... .

- **2**   In the Define voice items dialog box, select the voice item you want to delete.

     Note: Be sure to select the correct item. The system does not prompt you again before deleting the selected file.

- **3**   Click Delete.

- **4**   Click Done to return to the application window.

To rerecord a voice item

1   On the Define menu, click Voice items... .

2   In the Define voice items dialog box, select the voice item you want to rerecord.

3   Click Edit... .

4   Click Record... .

Result: The Specify Phoneset dialog box appears.

5   In the Specify Phoneset box, type the number of the phoneset you want to use for recording, and then click Dial.

6   Answer the phoneset when it rings.

7   Click Record.

8   Speak the new content of the voice item.

9   Click Stop.

10 If you are satisfied with the recording, click Done and go to step 12.

11 If you are not satisfied with the recording, repeat steps 4 to 7.

12 Hang up the phoneset.

13 Click Done until you return to the application window.

To reimport a voice item

    1   On the Define menu, click Voice items... .

    2   In the Define voice items dialog box, select the voice item into which you want to reimport voice.

    3   Click Edit... .

    4   Click Import... .

    5   Select the file that contains the new voice item.

    6   Click Open.

    7   Click OK.

    8   Click Done until you return to the application window.

See also

See Chapter 10, "Maintaining applications" for more information on VIM and on printing voice item details.

Copying and pasting a voice item

Introduction

Copy and paste voice items into applications so that you do not have to re-create voice between applications. Voice items belong to applications. To use a voice item from an application, copy that voice item and then paste it into another application. You need to know how to avoid replacing existing voice items by accident.

How to copy a voice item

You can copy a voice item in one of two ways:

■   Copy the block with which the voice item is already associated.

■   Copy the voice item in the Define voice items dialog box.

Copy a block

When you copy a block in an application, do not copy the block's associated voice items. However, when you copy a block between applications, copy its configuration plus one or more voice items.

Copy in the Define voice items dialog box

When you use the Define voice items dialog box, copy only voice items. You can copy one or more voice items.

Note: Identify voice items in an application using a unique name and a unique ID. Voice items cannot have the same names or IDs.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window

To copy a voice item

1   Open the application in which you want to copy the voice item.

2   On the Define menu, click Voice items... .

          Result: The Define voice items dialog box appears.
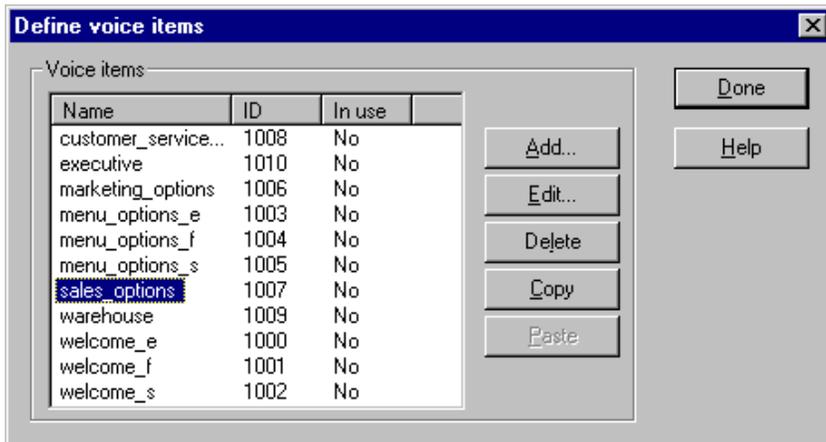
3   In the Define voice items dialog box, select the voice item you want to copy.

4   Click Copy.

          Note: The voice item is copied to the clipboard so that you can paste it. To do a multiple copy, select more than one voice item.

5   Click Done to return to the application window.

To paste a voice item

1   On the File menu, click Open... .

2   Open the application into which you want to paste the voice item.

3   On the Define menu, click voice items... .

4   Click Paste.

          Note: You can paste a voice item into another application, but you cannot paste it within the same application. Sometimes when you attempt to paste a voice item, the Voice Item Conflict dialog box appears because an item already exists with the same name, ID, or both. To paste the voice item, you must change the duplicate name or ID, or accept the proposed defaults.

5   Click Done to return to the application window.

Resolving name or ID conflicts for a voice item

Introduction

Resolve a name or an ID conflict for a voice item so that you can paste the voice item in an application.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window

```
Voice item conflict (1 of 1)

  The application already contains a voice item called 'sumi' or with ID '1000'

  Would you like to:

  ○  Skip the paste for this item?

  ○  Replace existing item?

  ◉  Change the name and ID of the item being pasted?

      ◉  Default name  [sumi1          ]      ID  [1001      ]

      ○  New name       [              ]      ID  [          ]

              [  OK  ]   [ Change All ]   [ Cancel ]   [  Help  ]
```

To resolve a name conflict, an ID conflict, or both

1 In the Voice Item Conflict dialog box, select Default name to use the name or ID assigned by Application Builder. Then go to step 5. To assign your own name or ID, go to step 2.

2 To define a new name or ID for the voice item, select New name.

3 In the New name box, type a name for the voice item.

4   In the New name ID box, type an ID for the voice item.

5   Click Change All to let Application Builder assign names or IDs to all the voice items to be pasted or click OK to resolve each conflict individually.

   Note: If you are pasting only one voice item, you return to the application window. If you are pasting more than one voice item, go to step 6.

6   Repeat steps 2 to 4.

Chapter 7

Working with faxes

In this chapter

Section A: About working with faxes

In this section

What are fax items?

Introduction

A fax item is made up of both a fax and a confirmation prompt. Create a fax item to place a fax into an application.

Definition: Confirmation prompt
A confirmation prompt is a voice recording that gives callers information about a fax.

Example: "Recreational cycling routes for the Greater Metropolitan Area."

How to put a fax item into an application

To include a fax item in an application, associate the item with a Fax Select block. Use multiple Fax Select blocks to put more than one fax item into an application. For example, to put six fax items into an application, use six Fax Select blocks.

How the session profile affects fax items

To include fax items in any application, define fax options in the session profile. You configure how many faxes callers can receive during one call and how the system delivers those faxes.

Maximum number of faxes per call

In the session profile, specify both the maximum number of faxes and the maximum number of fax pages that a caller can receive during one call. When a caller reaches the first maximum number in an application, a warning message plays and the application takes the caller to the next block.

Types of fax delivery

In the session profile, you also configure the type of fax delivery the system uses:

- same-call
- callback
- caller's choice

Same-call delivery

With same-call delivery, the caller—who must be at a faxphone—receives faxes after selecting them. Same-call delivery avoids billing problems because the caller pays any long distance charges.

Callback delivery

With callback delivery, the caller provides a fax number to which the system delivers faxes. This callback number must be validated against the restriction/ permission list, which you also configure in the session profile. For example, a restriction could prevent the system from calling back an international faxphone number.

Caller's choice delivery

With caller's choice delivery, the system prompts callers to indicate whether they want either same-call or callback delivery.

See also

For information about the session profile, see Chapter 9, "Putting applications into service."

For information about the Fax Select block, see Chapter 4, "Understanding blocks."

To associate a fax item with the Fax Select block, see Chapter 5, "Working with blocks."

Using faxes created for Meridian Mail Voice Services

Introduction

You can migrate the following items to Application Builder from faxes created for Meridian Mail Voice Services:

- announcements
- fax items
- menus

Contents of a fax item

Each fax item from Voice Services contains

- a fax
- a confirmation prompt

How to identify migrated fax

In general, migrated faxes have the prefix "Migrated_FAX." The prefix indicates the fax was created in Meridian Mail Voice Services.

A fax is identified in Application Builder by a prefix of "Migrated _FAX" and its ID from Voice Services. For example, a Voice Services fax with an ID of 66 appears as "Migrated_FAX66" in Application Builder. The description of the application is "Migrated from Fax Service 1627."

Within that file, you see the fax item with both a name and an ID (for example, FaxItem 1000).

Format of migrated fax

In Application Builder, migrated fax is in the same format as fax items.

Access
On the server, you access migrated fax in the same way that you access fax items.

Use
You can use migrated fax in any application that has fax functionality.

Applications that contain migrated fax

You can use migrated fax in new applications and in rebuilt applications that existed in Meridian Mail Voice Services. Consider when to build both types of applications.

New applications
You can build new applications that use migrated fax either before or after the fax is migrated from Voice Services.

If you build new applications before migration, you save time. However, you can complete the applications and use them only after migration.

Rebuilt applications
You can rebuild applications that use migrated fax either before or after the fax is migrated from Voice Services.

You save time if you rebuild applications before migration. However, you can complete the applications and use them only after migration.

You can do everything at once if you rebuild applications after migration. You can paste the fax into the applications during creation. Also, the migrated fax can help you remember what to rebuild.

See also

For information about migrated announcements and voice prompts, please see Chapter 6, "Working with voice recordings."

Section B: Working with faxes

In this section

Creating a fax item

Introduction

When you put faxes into your applications, you can give callers more detailed information than what voice recordings provide. Faxes can give callers access to directories, forms, lists, and maps. To put faxes into applications, you create fax items.

Name and ID of a fax item

When you create a fax item, you define its name and ID.

Name
The name identifies the fax item by a unique word. The name can contain up to 30 characters.

Example: map

ID
The ID distinguishes the fax item by a unique number. The number can contain up to four digits and must be in the range between 1000–3000.

Example: 1143

When you use Fax Item Maintenance, you specify fax items by their IDs. To indicate the fax item that you want to edit, input its ID on the faxphone keypad.

Where fax items are saved

As soon as you save a fax item, it appears on the server. You can access the item from any client and also remotely by phoneset using Fax Item Maintenance.

After you save a fax item

You can save a fax item if it has only a name and an ID. However, the item is empty because it contains no fax or confirmation prompt. You can add a fax by importing or scanning it.

Import a fax

You can import faxes from anywhere on your client PC network. To import a fax into a fax item, save the fax in a special format known as tagged image file format, class F (TIFF-F).

What is TIFF-F?
Tagged image file format (TIFF) lets you exchange image files between computers. Various classes of TIFF increase the portability of TIFF files. TIFF-F format lets you exchange fax images between computers. Even if a fax contains only text, that fax is considered an image. In CallPilot, a fax must be in TIFF-F format.

Saving in TIFF-F
When Application Builder installs on your computer, a fax printer driver also installs. The printer driver's name is Nortel Fax. You can save files in TIFF-F by using the Nortel Fax print driver. When saving files in TIFF, be aware of its classes or subtypes, such as Class F. Not all subtypes of TIFF are fax-compatible. All TIFF files, no matter what their subtype, have a TIF extension.

Printing TIFF-F files
Printing a file as TIFF-F is similar to printing a file as PostScript (PS). You can save any file in TIFF-F simply by printing it after selecting the Nortel Fax printer driver.

Scan a fax

To scan a fax into a fax item, make sure the fax item exists on the server. The fax item appears on the server as soon it is created. Once the fax item is on the server, you call Fax Item Maintenance from a faxphone. Then, you

- identify the item by inputting its ID on the faxphone keypad
- scan the fax

Note: You can only edit a fax item using Fax Item Maintenance. You cannot create or delete a fax item using FIM.

Confirmation prompts

A confirmation prompt is a voice item that gives information about the fax.

How to create a confirmation prompt

To create a confirmation prompt that gives callers information about a selected fax, create a voice item.

Blank confirmation prompts

If a confirmation prompt is blank, then the system does not play it. However, if a confirmation prompt contains no voice but some background noise, then the system plays the full prompt. Make sure there are no confirmation prompts with background noise that callers will hear.

See also

For information about what to include in a fax item, see Chapter 2, "Creating applications."

For information about Fax Item Maintenance, see Chapter 10, "Maintaining applications."

For information about how to create voice items, see Chapter 6, "Working with voice recordings."

How to create a fax item

Follow these procedures to create a fax item:

1. To define a fax item.

2. To import a file that contains a fax.

Follow these procedures to create a confirmation prompt that describes a fax:

1. To record voice for a fax item.

2. To import a file that contains voice for a fax item.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window

To define a fax item

1   On the Define menu in the application window, select Fax Items... .

Result: The Define fax items dialog box appears.

Define fax items					
Fax items					
Name	ID	In use		Done	
April_promotions	1000	No	Add...	Help	
August_workshops	1006	No			
company_map	1004	No	Edit...		
costing_worksheets	1008	No			
expense_claims	1009	No	Delete		
holiday_sales	1010	No			
July_workshops	1005	No	Copy		
June_promotions	1002	No			
May_promotions	1001	No	Paste		
September_works...	1007	No			
special_selloffs	1003	No			
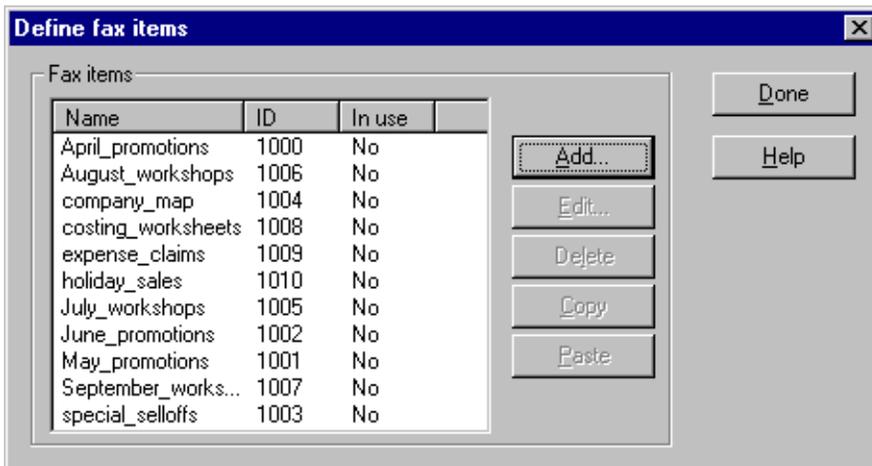
2   Click Add... .

   Result: The Add fax item dialog box appears.

3   In the Name box, type a name to identify the fax item.

4   In the ID box, accept the proposed default or type a number to identify the fax item.

5   To include a description of the fax, in the Fax description box, type information about the fax.

6   To include a description of the confirmation prompt, in the Fax confirmation description box, type information about the prompt.

7   Click Done.

   Result: The Edit fax item dialog box appears.

8   Click OK.

9   Click Done.

To import a file that contains a fax

Before you import a file that contains a fax you must save that file as a fax. See <u>"Saving a file as a fax" on page 298</u> for more information.

1   On the Define menu, click Fax items... .

Result: The Define fax items dialog box appears.
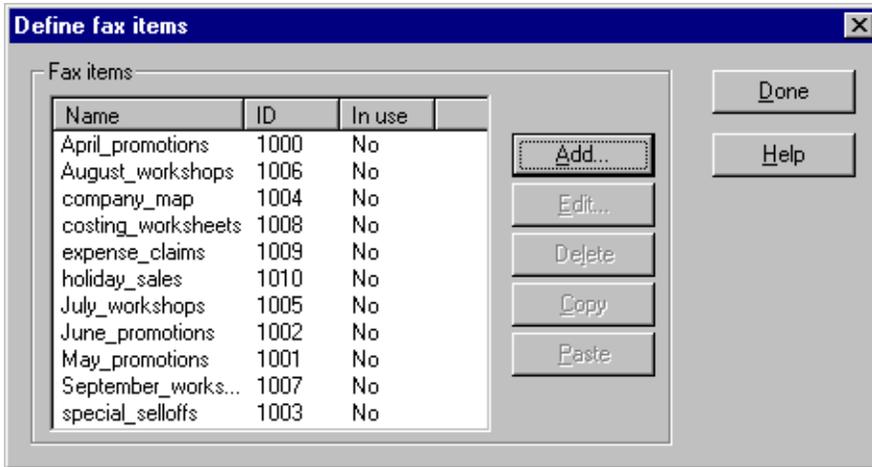
2   In the Define fax items dialog box, select the fax item into which you want to import the fax.

3   Click Edit... .

Result: The Edit fax item dialog box appears.

4   Under Fax item content box, click Import... .

Result: The Import fax item dialog box appears.

5   Select the file that contains the fax.

6   Click Open.

Result: The Edit fax item dialog box reappears.

7   Click Done until you return to the application window.

To record voice for a fax item

1 On the Define menu, click Fax items... .

Result: The Define fax items dialog box appears.

Define fax items				✕
Fax items				

Fax items

Name	ID	In use	
April_promotions	1000	No	
August_workshops	1006	No	
company_map	1004	No	
costing_worksheets	1008	No	
expense_claims	1009	No	
holiday_sales	1010	No	
July_workshops	1005	No	
June_promotions	1002	No	
May_promotions	1001	No	
September_works...	1007	No	
special_selloffs	1003	No	

Done   Help   Add...   Edit...   Delete   Copy   Paste
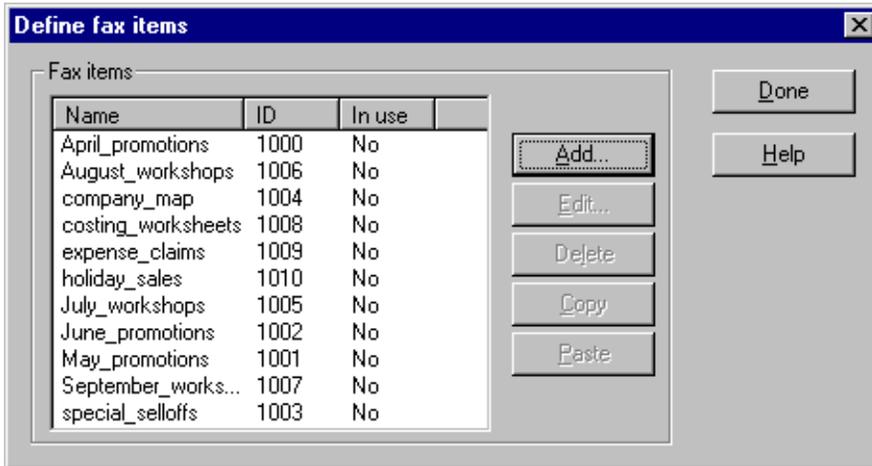
2 In the Define fax items dialog box, select the fax item for which you want to record voice.

3 Click Edit... .

Result: The Edit fax item dialog box appears.
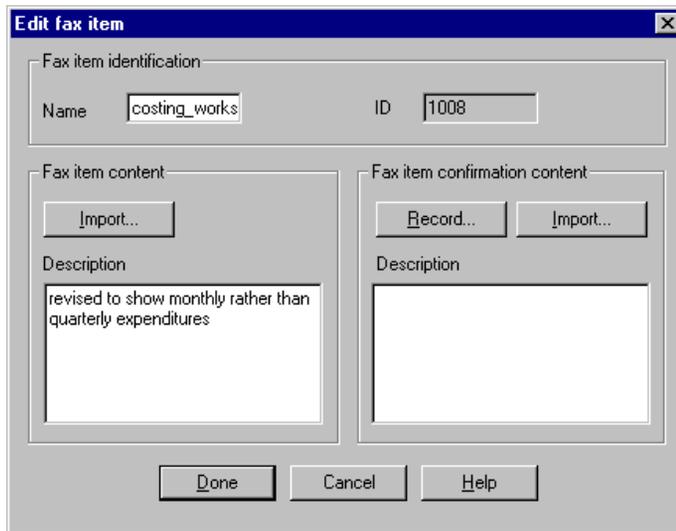
4   Under Fax item confirmation content, click Record... .

5   In the Specify Phoneset box, type the phone number of the phoneset you
     want to use for recording.

6   Click Dial.

7   Answer the phoneset when it rings.

8   Click Record.

9   Speak the content of the confirmation prompt.

10 Click Stop.

11 If you are satisfied with the recording, click Done, and go to step 13.

12 If you are not satisfied with the recording, repeat steps 8 through 10.

13 Hang up the phoneset.

14 Click Done until you return to the application window.

To import a file that contains voice for a fax item

1   On the Define menu, click Fax items... .

Result: The Define fax items dialog box appears.
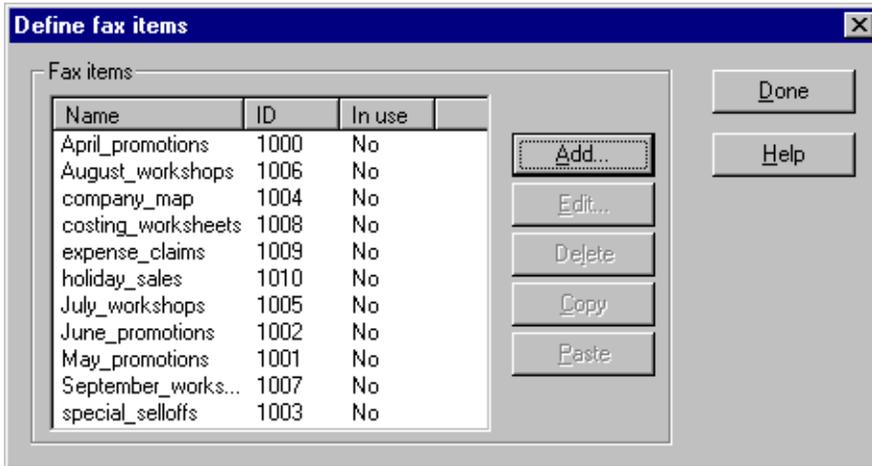
2   In the Define fax items dialog box, select the fax item into which you want to import the voice file.
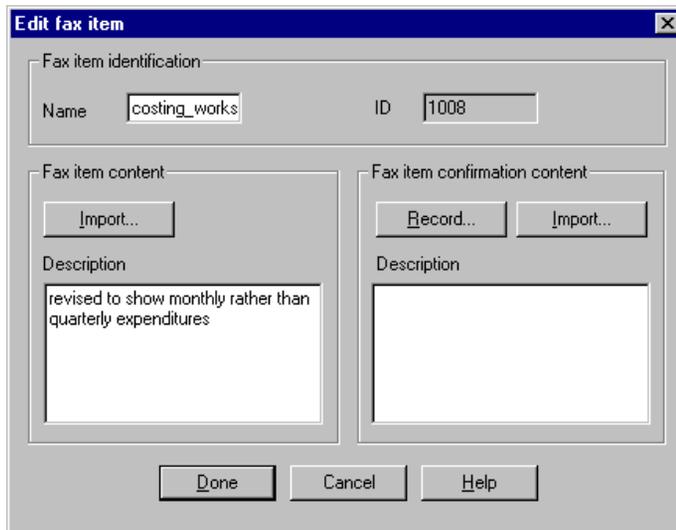
3   Click Edit... .

Result: The Edit fax item dialog box appears.

4   Under Fax item confirmation content, click Import... .

5   Select the file that contains a recording that describes the fax.

6   Click Open.

7   Click Done until you return to the application window.

Editing a fax item

Introduction

Both Application Builder and Fax Item Maintenance (FIM) enable you to edit fax items. Use Application Builder to do maintenance when you are at the office. Use FIM to edit fax items using a faxphone when you are away from the office.

IDs and FIM

You can print out the details for all fax items in an application. These details include the IDs of all the fax items. When you know the IDs, you can use FIM.

How to edit a confirmation prompt

If you edit the content of a fax item, often you also have to edit the confirmation prompt. You edit the voice item used for a confirmation prompt just as you edit any other voice item.

Definition: Online updating

Online updating means that callers do not encounter edited items until after you finish changing and saving them, and saving and closing the application in which they reside. An application does not update until you save it and you and callers exit from the application.

Example: Online updating

The fax that shows directions to your company contains an incorrectly labeled street, so you must replace it with a new map.

You do not prevent callers from accessing the application, because the mistake on the map does not affect the application. To take the application out of service would cause more problems. A caller accesses the application before you open it and change the fax. Immediately after the caller accesses the application, you replace the old map with the new one. You import the new map in a TIFF-F file. Then, you save the fax item, and save and exit from the application. You exit from the application before the caller exits.

When the caller selects the fax, she gets the old map. She accessed the last saved application, which contains the old map. After she exits from the application and receives the fax, the caller contacts the receptionist to point out the error in the map. The receptionist tells the caller to redial the application and reselect the fax. The caller accesses the updated and saved application, and now receives the correct fax.

How to edit and delete fax items

Getting there CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder >
application window
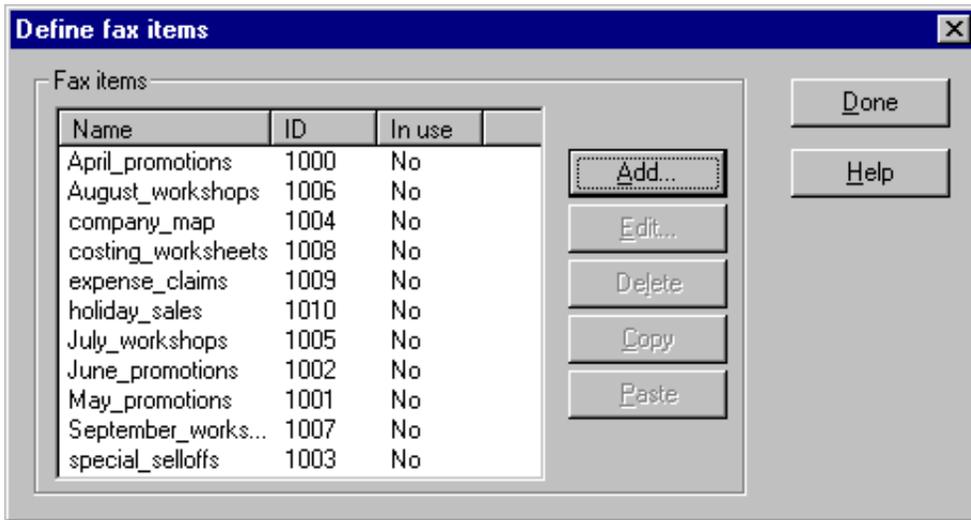
To edit a fax item

1 In the application window, click Fax items.... from the Define menu.

2 In the Define fax items dialog box, select the file you want to edit.

3 Click Edit.... .
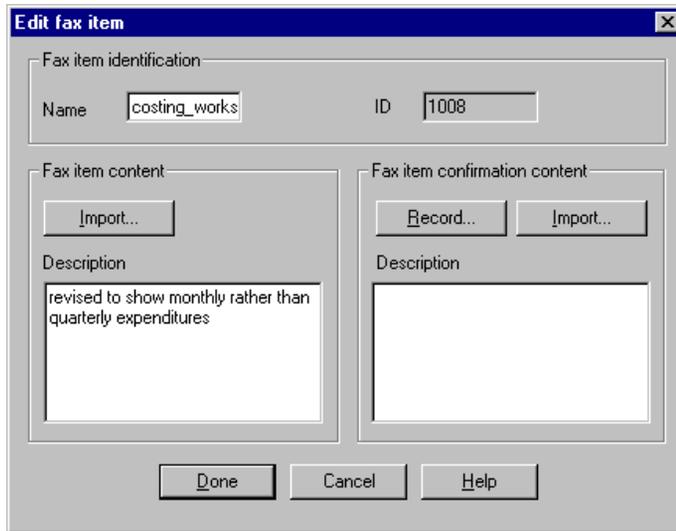
Result: The Edit fax item dialog box appears.

4   In the Name box, select the existing name and then type a new one.

5   In the Description box, select the existing text and then type new information.

6   In the Description box, select the existing text and then type new information about the prompt.

7   To re-create the confirmation prompt that describes the fax see, or .

8   To reimport a file that contains a fax, see page .

To reimport a file that contains a fax

Before you reimport a file that contains a fax, you must save that file as a fax. See"Saving a file as a fax" on page 298 for more information.

1   On the Define menu, click Fax items... .

2   In the Define Fax Items dialog box, select the fax item into which you want to reimport the fax file.

3   Click Edit.... .

    Result: The Edit fax item dialog box appears.
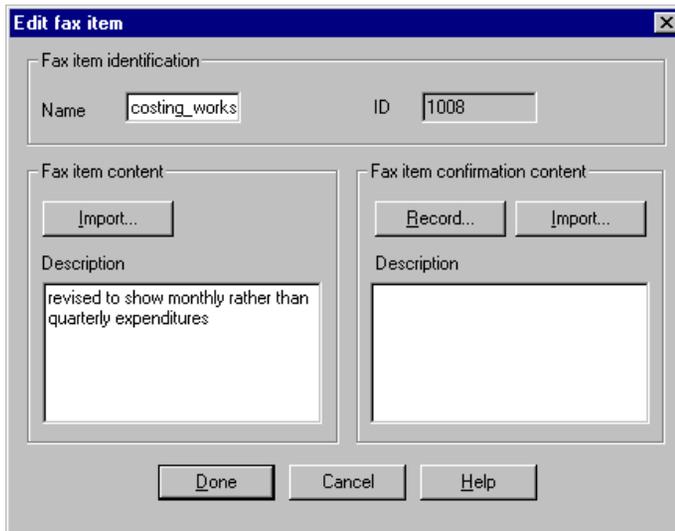
4   Under Fax item content, click Import... .

5   Select the file that contains the fax.

6   Click Open.

7   Click Done until you return to the application window.

To rerecord voice for a fax item

1   On the Define menu, click Fax items... .

2   In the Define fax items dialog box, click the name of the fax item into which you want to reimport the file.

3   Click Edit... .
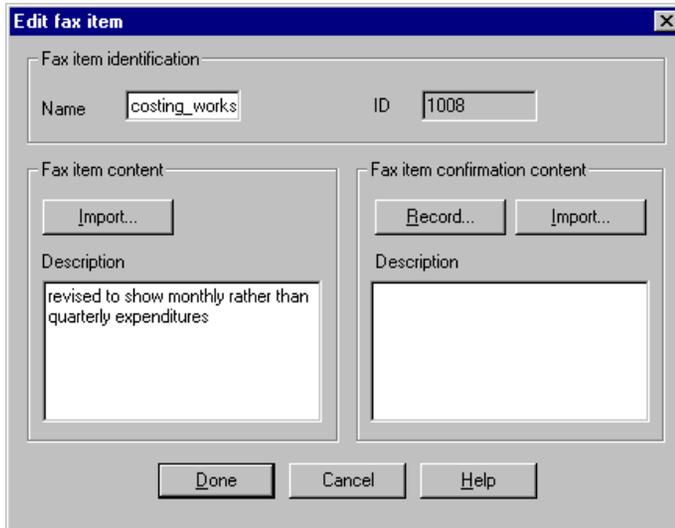
       Result: The Edit fax item dialog box appears.

4   Under Fax item confirmation content, click Record... .

5   In the Specify Phoneset box, type the phone number of the phoneset you want to use for recording.

6   Answer the phoneset when it rings.

7   Click Record.

8   Speak the confirmation prompt.

9   Click Stop.

10   If you are satisfied with the recording, click Done, and go to step 12.

11   If you are not satisfied with the recording, repeat steps 7 to 10.

12   Hang up the phoneset.

13   Click Done to return to the application window.

To reimport a file that contains voice for a fax item

1   On the Define menu, click Fax items... .

2   In the Define fax items dialog box, select the fax item into which you want to reimport the voice file.

3   Click Edit... .

   Result: The Edit fax item dialog box appears.
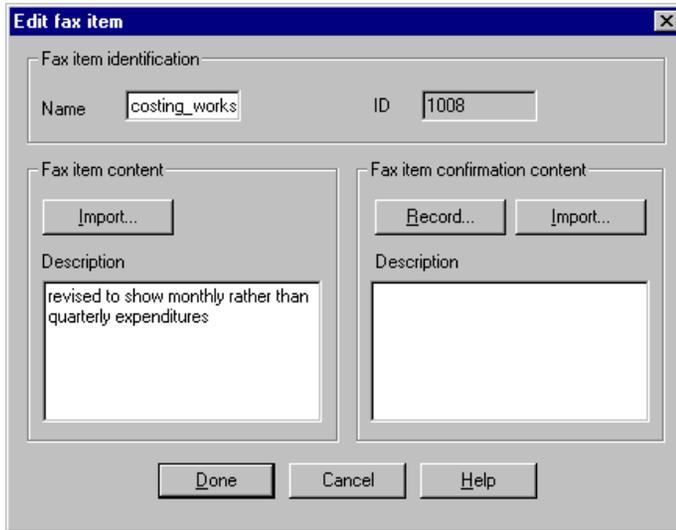
4   Under Fax item confirmation content, click Import... .

5   Select the file that contains the voice you want to import.

6   Click Open.

7   Click Done until you return to the application window.

To delete a fax item

1   On the Define menu, click Fax items... .

2   In the Define fax items dialog box, click the name of the fax item you want to delete.

   Note: Be sure to select the correct item. The system does not prompt you again before deleting the selected file.

3   Click Delete.

4   Click Done to return to the application window.

To configure how Fax Item Maintenance users can edit fax items

1   On the File menu, click Properties... .

Result: The File properties dialog box appears.
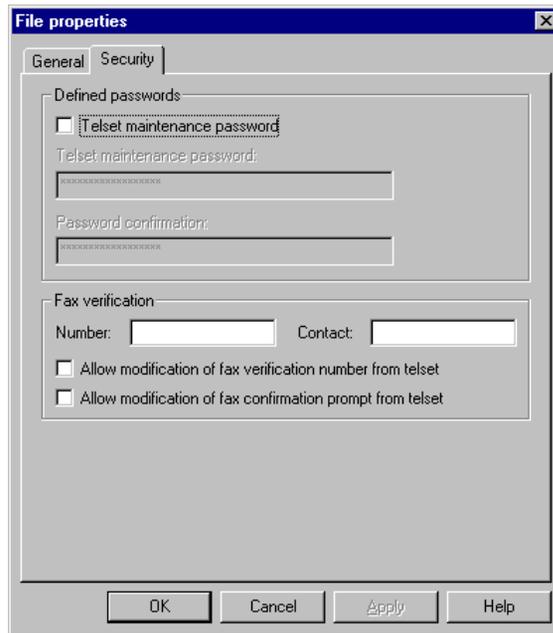
2   Click the Security tab.

3   In the Number box, type the phone number of the fax machine that receives faxes modified in Fax Item Maintenance.

4   To have your extension number appear on the cover sheets of modified faxes, in the Contact box, type your extension number.

5   To let Fax Item Maintenance users change the phone number of the verification fax machine, make sure the Allow modification of fax verification number from telset box is checked.

6   To let Fax Item Maintenance users change the confirmation prompts of fax items, make sure the Allow modification of fax confirmation prompt from telset box is checked.

7   Click OK to return to the application window.

Copying and pasting a fax item

Introduction

Copy and paste fax items to save having to re-create faxes between applications. Fax items belong to applications. To use a fax item from one application, copy that fax item and then paste it into another application. You also need to know how to avoid replace existing fax items by accident.

How to copy a fax item

Copy a fax item in one of two ways:

- Copy the Fax Select block with which the fax item is already associated.
- Copy the fax item in the Define Fax Items dialog box.

Copy a Fax Select block

When you copy a Fax Select block within an application, you do not copy its associated fax item. However, when you copy a Fax Select block between applications, you copy its associated fax item. Copy a Fax Select block between applications to copy its configuration plus its fax item.

Copy in the Define Fax Items dialog box

Use the Define Fax Items dialog box to copy fax items. You can copy one or more fax items.

How to paste a fax item

Based on how you copy a fax item, paste it in one of two ways:

- Paste the copied Fax Select block with which the fax item is already associated into another application.
- Paste the copied fax item in the Define Fax Items dialog box of another application.

Unique names and IDs

You identify fax items in an application by

- name
- ID

Each fax must have a unique name and ID.

When you paste a fax item

When you try to paste a fax item, Application Builder checks its name and ID against all the other names and IDs of fax items already in the application. Because each name and ID must be unique, Application Builder notifies you if an existing fax item already has that name, ID, or both. By notifying you, Application Builder ensures you replace an existing fax item with the item to be pasted only if you want to do so. If you do not want to replace the existing item, you can change the name, ID, or both, of the item you want to paste.

Name or ID conflicts

In a partial conflict, an existing fax item has the name or ID of the fax item you want to paste. In a full conflict, the existing fax item has both the name and the ID of the fax item you want to paste.

Default names and IDs

Whenever a conflict occurs, Application Builder proposes default names and IDs for the fax items you want to paste. Use the default names and IDs to save time. You can always change the names later.

How to copy and paste fax items

Getting there   CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder >
application window

```
Define fax items                                                    ×
 ┌ Fax items ──────────────────────────────────┐
 │  Name                ID      In use          │      ┌──────────┐
 │  April_promotions    1000    No              │      │  Done    │
 │  August_workshops    1006    No              │      └──────────┘
 │  company_map         1004    No          ┌──────────┐
 │  costing_worksheets  1008    No          │  Add...  │  ┌──────────┐
 │  expense_claims      1009    No          └──────────┘  │  Help    │
 │  holiday_sales       1010    No          ┌──────────┐  └──────────┘
 │  July_workshops      1005    No          │  Edit... │
 │  June_promotions     1002    No          └──────────┘
 │  May_promotions      1001    No          ┌──────────┐
 │  September_works...   1007    No          │  Delete  │
 │  special_selloffs    1003    No          └──────────┘
 │                                          ┌──────────┐
 │                                          │  Copy    │
 │                                          └──────────┘
 │                                          ┌──────────┐
 │                                          │  Paste   │
 │                                          └──────────┘
 └──────────────────────────────────────────┘
```
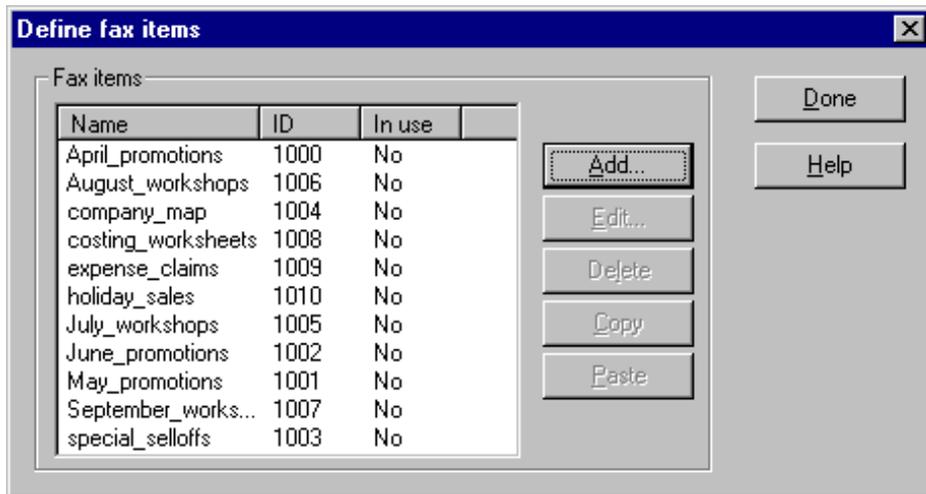
To copy a fax item

1   Open the application from which you want to copy the fax item.

2   On the Define menu, click Fax Items... .

3   Under Fax Items, select the fax item you want to copy.

4   Click Copy.

Note: Copy the fax item to the clipboard so that you can paste it. To make
multiple copies, select more than one fax item. Click Done to return to the
application window.

To paste a fax item

1   On the File menu, click Open... .

2   Open the application into which you want to paste the copied fax item.

3   On the Define menu, click Fax items... .

4   Click Paste.

Note: Sometimes when you attempt to paste a fax item, the Block Name Conflict dialog box appears because an item already exists with the same name, ID, or both. You must change the name or ID to paste the new item.

5   Click Done to return to the application window.

Resolving name or ID conflicts for a fax item

Introduction

Resolve a name or ID conflict for a fax item so that you can paste the fax item into an application. If the fax item you are trying to paste conflicts with an existing fax, the Fax Item conflict dialog box appears.
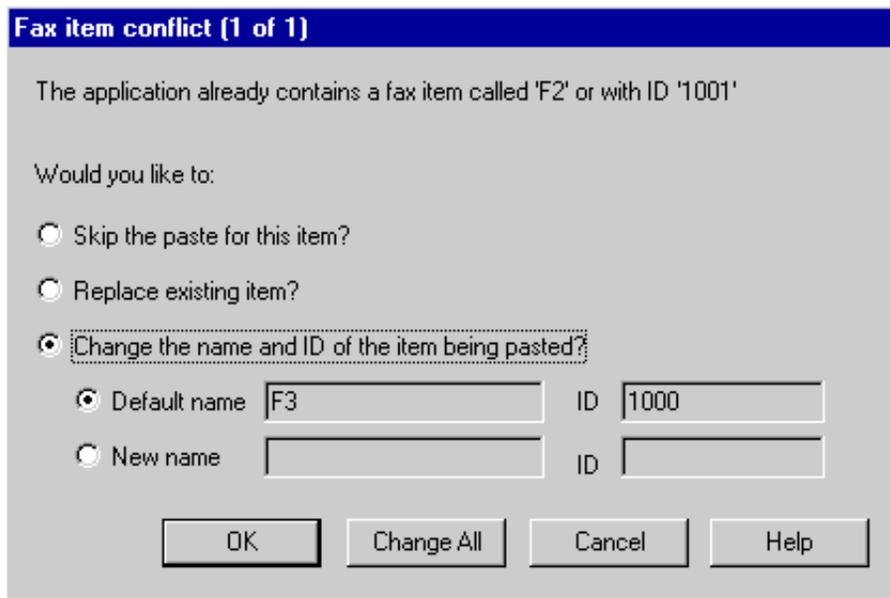
Fax item conflict (1 of 1)

The application already contains a fax item called 'F2' or with ID '1001'

Would you like to:

○ Skip the paste for this item?

○ Replace existing item?

◉ Change the name and ID of the item being pasted?

　　◉ Default name `F3`　　　　　ID `1000`

　　○ New name `          `　　　　ID `     `

　　[OK]　　[Change All]　　[Cancel]　　[Help]

To resolve a name or ID conflict for a fax item

1 In the Fax item conflict dialog box, select Default name to use the name or ID assigned by Application Builder. Then go to step 5. To assign your own name or ID go to step 2.

2 To define a new name or ID for the fax item, make sure New name is selected.

3 In the New name box, type a name for the fax item.

4 In the New name ID box, type an ID for the fax item.

5   Click Change All to let Application Builder assign names or IDs to all the fax items to be pasted, or click OK to resolve each conflict individually.

Note: If you paste only one fax item, return to the application window. If you paste more than one fax item, go to step 6.

6   Repeat steps 2, 3, and 4.

Saving a file as a fax

Introduction

Save a file as a fax to ensure it is in TIFF-F, the only format that fax items support. Then, you can import the saved fax into a fax item.

To save a file as a fax

1   In the file you want to save as a fax, on the File menu, click Print.

2   From the list of printers, select Nortel Fax.

3   Click Print or OK.

4   Click No.

5   To add another file to the fax, repeat steps 1 to 4.

6   To view a file with fax viewing software, select the file and click View/Edit Image. When you are finished, on the File menu, click Exit.

7   To delete a file, select it and click Delete Item.

8   To scroll up and down the list of files, click Move Forward and Move Backward.

9   Click Save As… .

10 From the Save as type list, select TIFF-F Files (*.tif).

11 In the File name box, before .tif, type a name for the fax.

12 From the Save list, select the directory in which you want to save the fax.

13 Click Save.

Chapter 8

Reusing existing applications

In this chapter

Section A: About reusing applications

In this section

How to reuse applications

Introduction

You can reuse functions that already exist in applications in various ways. As a result, you do not have to re-create parts of applications or entire applications if they already exist.

Three ways to reuse applications

You reuse applications in three ways:

- by copying and pasting blocks
- by saving applications under other names
- by exporting and importing applications

Copy and paste blocks

Copy blocks within an application if you want to use their configuration. Copy blocks between applications if you want to use their configuration and their associated voice and fax items.

Example

Copy both an Announcement block and a Thru-Dial block from an application to paste into another application. Copy the Announcement block because you want to use the voice item associated with the Announcement block. Copy the Thru-Dial block because you need its configuration in the new application. Callers can define which number they want to reach. They must enter a number of at least four digits.

Save applications under other names

If an application has a reusable structure and various blocks configured as you want, you can save that application under another name. Then, you customize the renamed application.

Example

An application called "Depts" contains these blocks: Menu, Announcement, and multiple Thru-Dials. In a new application, you need the same blocks in the same arrangement. However, the new menu must give callers options for how to get information from a particular department rather than which departments they can reach. The Thru-Dial blocks, associated with the menu keys, pass callers to specified extension numbers.

Save "Depts" as "Sdept." In "Sdept," which stands for sporting goods department, you modify the Menu block so that it tells callers whom they can reach in the department. You also change the specified extension numbers for each of the Thru-Dial blocks so callers can transfer to people in the sporting goods department. Because the Announcement block plays a voice item that gives general help for any menu, you do not change this block.

Export and import applications

Sometimes you need to reuse a large part of an application regularly. You can create that part only once. Then you export the application so that you can import it into other applications that need the same functions.

Example

You need to use an automated attendant in various applications. Instead of re-creating that functionality every time you need it, you create one automated attendant application. You create an application that has the following blocks: Day Control, Time Control, Announcement, Menu, Thru-Dial, and Call Transfer.

You then configure the blocks. You configure the Day Control block so that it routes callers to the Time Control block on business days. On nonbusiness days, callers hear an announcement that lists business days and hours. Callers hear the same announcement if they reach the Time Control block after business hours. On a business day and during business hours, callers go to the Menu block.

You configure the Menu block so callers hear a greeting that gives them two options: "Hello. Thanks for calling Oswald Law Offices. If you know the extension of the person you wish to reach, press 1. If you don't know the extension, press 2." You connect the Thru-Dial block to the number 1 menu key.

This allows callers to dial people only by number. You connect the Call Transfer block to the number 2 menu key. You also configure that block to pass callers to a live attendant. As a result, callers reach someone who can direct their calls to the appropriate people.

After you complete the application, you save it as "Attendant" and export it. Whenever you need to add an automated attendant to another application, you import "Attendant."

See also

For information about each block and about exporting and importing applications, see Chapter 4, "Understanding blocks."

To copy and paste blocks, see Chapter 5, "Connecting blocks," on page 193.

Precautions for reusing applications

Introduction

Take precautions to ensure that errors do not occur when you import and export applications and save them under other names.

When to save an application

When you save an application under another name, ensure that its name and ID are unique on the hard drive partition on which the application resides. Otherwise, you can overwrite another application.

When to import and export applications

Take the following precautions before and after you export, and when you import.

Before you export

You can export an application only when it is complete. A complete application has all its blocks configured and connected, and it is saved. Any blocks that have a pink border are not configured or connected.

After you export

After you export an application, a Continue block appears in its window. The Continue block enables callers to move from the exported application to the importing application. For example, callers call the importing application, go to the exported application, and then go back to the importing application. Therefore, connect any blocks to the Continue block that should take callers from the exported application to the importing application. If you do not connect a block to the Continue block, the exported application is the terminating application.

When to import

The exported, or source, application is represented by an Imported Application block in the importing application. The Imported Application block has the same name as the source application. The importing application is known as the destination application.

Both outputs of the Imported Application block correspond to parts of the source application. Like every application, the source application has an End block. Its End block corresponds to the Imported Application block's End output. Similarly, the source application's Continue block corresponds to the Imported Application block's Continue output. Therefore, you pass callers to the Continue block in the source application. Then, the Continue output of the Imported Application block directs where callers go next in the destination application.

Unsuccessful importing and exporting

If you do not take precautions while exporting and importing applications, callers can follow the wrong application flow. For example, if you do not connect the appropriate blocks in the source application to the Continue block, then callers cannot move from that application to the destination application.

Restrictions on the number of levels

You cannot have more than 20 levels of imported applications. However, the system does not limit how many imported applications you use.

Restrictions on deleting applications

To ensure that all exporting and importing works smoothly, the system does not let you delete an application if it is imported or if it appears in the SDN Table.

See also

For information about the Continue block, see "Continue block" on page 162.

For information about using the Continue and Imported Application blocks, see "How the Continue and Imported Application blocks work together" on page 171.

For information about the SDN Table, see Chapter 9, "Putting applications into service."

Section B: Reusing applications

In this section

Saving an application under another name

Introduction

Save an application under another name to base a new application on the current application.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window

To save an application under another name

1 On the File menu, click Save As.

Result: The Save As dialog box appears.
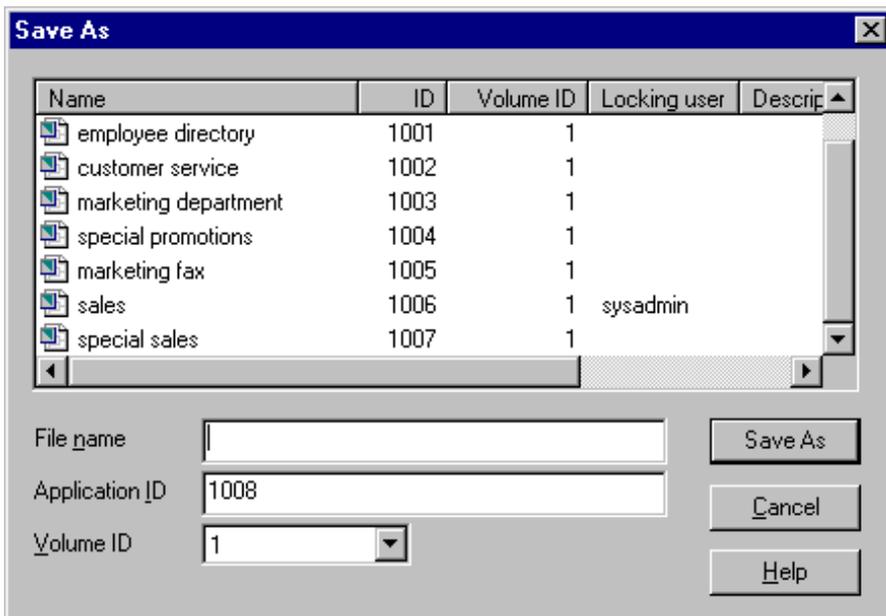
2 In the File name box, type a name for the new application to which you want to save data.

---

3   In the Application ID box, type a unique number for the new application.

4   To move the new application to another hard drive partition, from the Volume ID list, select another number.

5   Click Save As to save the data as a new application and return to the application window.

See also

To save an application under another name, see "How to reuse applications" on page 302.

For information about reusing applications, see "Precautions for reusing applications" on page 305.

Exporting an application

Introduction

Export an application so other applications can import it and use its functionality.

Note: Before you export an application, you must complete all of its blocks and save it.

Getting there CallPilot Administration Client > CallPilot System > System Administration > Service Administration > Application Builder > application window

To export an application

1   On the File menu, click Export.

     Result: A Continue block appears in the application window.

2   To the Continue block, connect any blocks from which callers should go to the destination application.

     Example: You connect the output of a main menu to the Continue block. Therefore, after callers press the appropriate menu key, they pass to the destination application, which lets them select faxes.

To cancel an export

In the application you no longer want to export, on the File menu, click Undo Export.

Note: You cannot cancel an export if the application has been imported by another application.

See also

For information about exporting an application, see <u>"How to reuse applications" on page 302</u>.

For information about the Continue block, see "Continue block" on page 162.

For information about using the Continue and Imported Application blocks, see "How the Continue and Imported Application blocks work together" on page 171.

Importing an application

Introduction

Import an application to use its functionality without having to re-create it.

Note: You must export an application before you can import it into another application.

Getting there   CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder >
application window

To import an application

1   On the File menu, click Import.

     Result: The Import dialog box appears
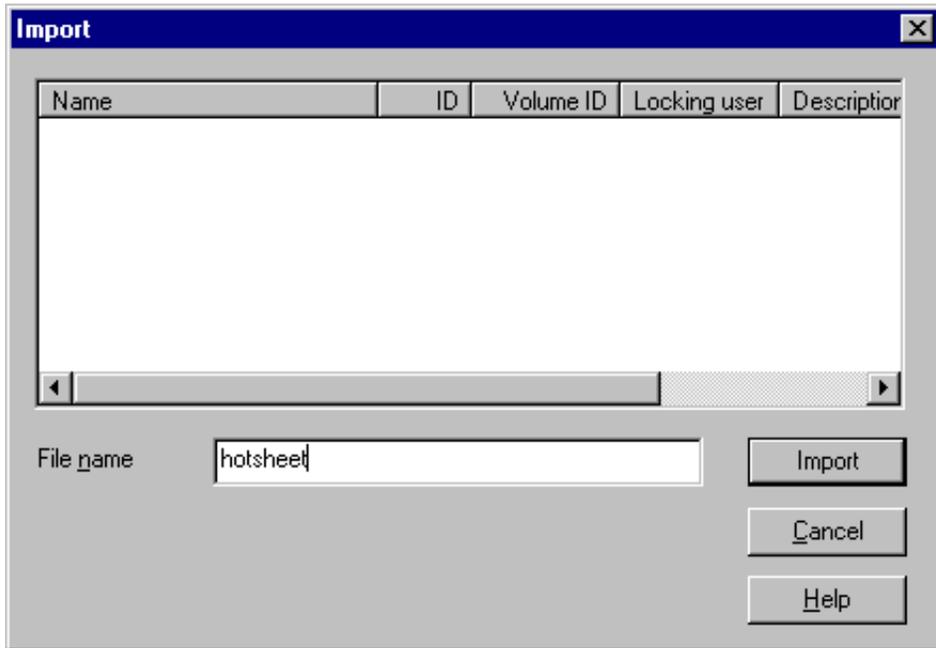
2   Select the application you want to place in the current application.

3   Click Import.

4   In the palette, click the Imported Applications tab.

5   Move the appropriate Imported Application block to the application window.

6   Connect the Continue output of the Imported Application block to another block.

To cancel an import

1   In the appropriate application, on the File menu, click Remove Import.

Result: The Undo Import dialog box appears.
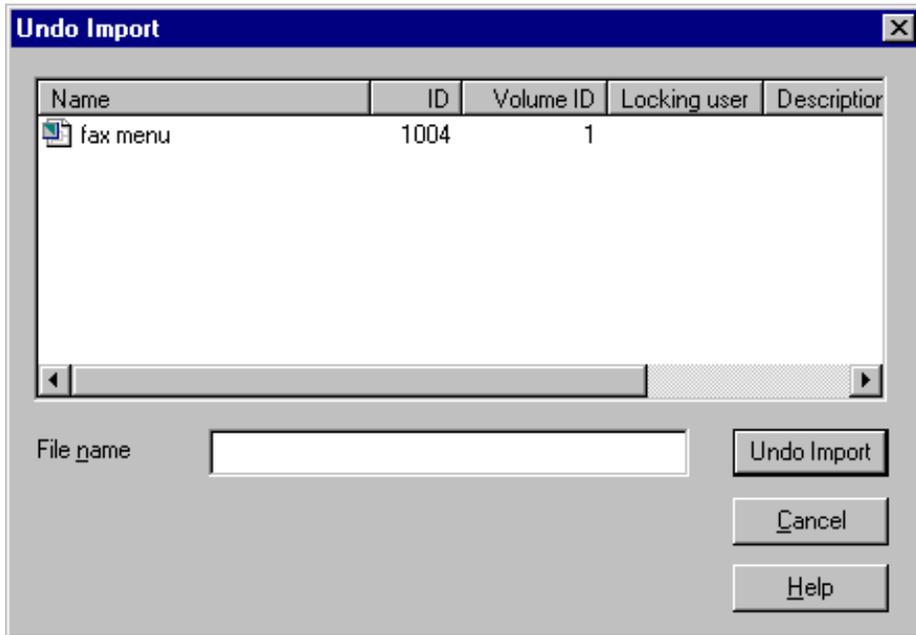
2   Select the application you want to remove from the current application.

3   Click Undo Import to remove the imported application and return to the application window.

Note: Imports cannot be cancelled if that application is referenced in the current application.

See also

For information about importing an application, see "How to reuse applications" on page 302.

For information about using the Continue and Imported Application blocks, see "How the Continue and Imported Application blocks work together" on page 171.

Chapter 9

Putting applications into service

In this chapter

How applications become services

Introduction

Before you can call and test an application that you have created, you must make it available. You need to know which applications you should make available and how to do so by configuring the SDN Table.

Complete applications

Before you can make applications available, make sure they are complete. All blocks in an application must be connected and configured. You must save each complete application.

How to make an application become a service

To make a complete application available so that you can dial and test it, you must add its telephone number, or DN, to the SDN Table. Until you do this, the application exists only in the system and is not accessible to callers.

What happens when you make an application available

An application becomes a service when you add an SDN to the SDN Table for that application.

Example

You are creating a voice menu application in Application Builder. While you work on the voice menu, it is considered an application. While you design and create the application, it is not available to callers.

Once you finish designing and creating the application, you are ready to put it into service so that you can test it. To do this, you add an SDN for the voice menu to the SDN Table. This puts the application into service and you can now dial the voice menu.

How callers are routed to services

Introduction

When you route callers through your application, keep in mind how calls are routed from the switch to services. Also consider how you configure the SDN Table and SDNs.

SDNs

Each CallPilot service that callers access by dialing a number needs an SDN in the SDN Table. You need to know what SDNs are and how to configure them to control the channels that are allocated to services.

Why you set up the session profile for services

Introduction

Some SDNs require additional configuration. You configure a session profile for all SDNs associated with Application Builder services.

Definition: Session profile

A session profile is a set of operational characteristics that is associated with the SDN of certain CallPilot services, including the services created in Application Builder. The session profile determines how a service behaves when it is called and the length of time that callers can use the service.

Multiple session profiles for one service

The session profile determines the behavior of a service on a per-SDN basis. You can enter the same service into the SDN Table more than once, with a different SDN for each entry. As well, you can configure the session profile of each SDN differently. Consequently, the same service can behave differently based on the SDN that callers dial.

Example 1

You have a service that contains fax items. In the SDN Table, add two SDNs for the service. Because you know that some callers can call the service from faxphones, configure the first SDN's session profile to use same-call delivery. Configure the second SDN's session profile to use callback delivery because other callers can access the service only from a phoneset.

Example 2

Your company's corporate directory appears in two services. The first service is a main menu from which external callers access the directory. The second service is the directory that employees access. Each service has its own SDN and, therefore, its own session profile. For the first service, configure a lower number of maximum invalid selections. You do so for security reasons. For the

second service, configure a higher number of maximum invalid selections. Security is less of an issue where internal callers are concerned. Also to ensure security, give the external callers' service a shorter session limit than the employees' service.

What the session profile controls

The session profile affects all Application Builder services. In particular, it affects the following blocks: Fax Select, Fax Send, and Menu. You must configure more session profile options for services with fax capability.

All Application Builder services

For all Application Builder services, the session profile determines the following aspects:

- the maximum length of a call session

- the maximum number of password failures allowed for services that contain the Password Check block and, therefore, have password-protected content

Application Builder services with fax capability

To include fax items in an application, define the application's fax options in the session profile of the SDN Table. In the session profile, establish settings for all fax applications and other settings that are specific to fax applications that use callback delivery.

For all fax applications

In the session profile, establish the following settings for all fax applications:

- the maximum number of faxes a caller can select during one call

- the maximum number of fax pages that the system delivers to a caller during one call

- the telephone number of the fax machine that the system uses to send faxes

- the fax delivery method (callback, same-call, caller's choice)

- whether a custom cover page, called a sponsor fax item, transmits with each fax

- how page transmission errors are handled

For fax applications that use callback delivery

In the session profile, you also establish the following settings for fax applications that use callback delivery:

- the DN to which fax callback transmissions are billed

- whether the system cover page transmits with each fax

- the extension number of the recipient of the fax

- the type (for example, national) of faxphone number for which the system must prompt callers so it knows where to deliver faxes

- the restriction/permission list against which the faxphone number must be validated before the system can make a fax callback transmission

Types of fax delivery

For services with fax capability, in the session profile, configure which type of fax delivery the system uses:

- same-call

- callback

- caller's choice

Same-call delivery

With same-call delivery, the caller—who must be at a faxphone—receives faxes after selecting them. Same-call delivery avoids billing problems, because the caller pays any long distance charges.

Callback delivery

Configure callback delivery if callers will access fax applications from a phoneset. With callback delivery, the caller provides the number of a faxphone to which the system delivers faxes.

If you configure callback delivery for services with fax capability, then you must configure callback handling. This ensures that callers are prompted to enter callback numbers in the appropriate format based on where they are calling from. Each callback number must be validated against the RPL, which you configure in the session profile. For example, a restriction can prevent the system from calling back an international faxphone number.

Caller's choice delivery

With caller's choice delivery, the system prompts callers to indicate if they want either same-call or callback delivery.

See also

Read more about "Fax Select block" on page 110 and "Fax Send block" on page 118.

Using a cover page for fax services

Introduction

From the SDN Table, configure both the session profile and callback handling. In the session profile, you can set up a custom cover page (called a sponsor fax) to send with all your faxes. In callback handling, you configure how faxes send using callback delivery. You also configure whether a system cover page sends with those faxes. The two cover pages are different, and they work together.

What information appears on the two cover pages

A system cover page contains information defined by the system. However, you can define the information that appears on a custom cover page. When you define that information, remember that a custom cover page is sent with all fax transmissions, including callback faxes. Include all important information on that page. Also remember that a system cover page sends only with callback fax transmissions.

System cover page

On a system cover page, the system automatically generates the following information:

- the caller's extension number (The system puts this number on the page only if you configure, in callback handling, that the system prompts the caller for the extension.)

- the number of the fax machine entered by the caller

- the sender's name and address (This information is entered in the session profile.)

- the total number of pages sent (including the cover page)

- the date and time the fax was submitted by the system for delivery

- instructions that the recipient should rerequest the information from the service if the fax does not transmit properly

Custom cover page

Define all the information that appears on a custom cover page. This cover page transmits with all faxes. Therefore, include important information, such as your company logo, and the name and number of a contact person.

A custom cover page is a soft-copy file in tagged image file format, class F (TIFF-F). You can save a file in TIFF-F by using the Nortel Fax printer driver that installs with Application Builder or by using fax-viewing and graphics software.

Transmission order for cover pages

Both the system and custom cover pages send only if you configure them to do so. The system cover page always transmits before the custom cover page. Therefore, if you configure both cover pages and the system sends a callback fax transmission, the fax transmits in the following order:

1.   system cover page

2.   custom cover page

3.   fax pages

See also

For information about TIFF-F, see Chapter 7, "Working with faxes."

How to test applications

Introduction

Callers interact with applications by listening and responding to voice. After you build an application and before you publish its SDN to callers, you must test it. You test an application by interacting with it from a caller's perspective.

Why you test

Testing an application enables you to access and interact with it from a caller's perspective and, therefore, gain valuable design input. Testing also gives you a chance to ensure that the application works as you intended.

When to test

You should test an application only after you believe it is complete and before you publish its SDN to callers.

What to test

To test an application, put it in the SDN Table, call it, and interact with all of its flow. For example, if a menu has five options, follow each of those options through to its end to ensure it works properly. Do the following when you test:

- Give no DTMF response at the beginning of the application to verify how it handles rotary-dial callers.

- Make no response at various times throughout the application to confirm that it correctly prompts callers to give input.

- Give incorrect responses at various times throughout the application to ensure that it correctly directs callers to give input.

- Make enough no responses in the application to check how it handles time-out periods.

After you test an application

After you are sure an application has no errors, publish its SDN so that callers can phoneset into and use the application.

Chapter 10

Maintaining applications

In this chapter

Section A: About maintaining applications

In this section

What maintaining applications means

Introduction

Application development never really ends. However, you usually reach a point at which you finish creating applications and begin to maintain them.

To maintain applications, you need to perform tasks such as

- checking and printing application details

- updating voice and fax items

- archiving and restoring applications

- testing updated applications before you make them available to callers

Who maintains applications

Application Builder allows for two administration roles: application and telset. Usually, one person fills both roles.

Application administration
In application administration, you create and maintain applications using Application Builder. You often also create and maintain voice and fax items.

Telset maintenance
In telset maintenance, you maintain the voice and fax items in applications using a phoneset from a remote location when you cannot use a client. To perform telset administration, you require a telset maintenance password.

How to maintain applications

The following list presents general information about each type of maintenance. For more information about a particular type, see the corresponding section.

Check and print application details

Check and print application details to collect both general and specific information about an application. Then use the information to maintain applications and share tasks with other administrators.

Use telset maintenance

Telset maintenance enables you to keep voice and fax items up to date with a phoneset. Therefore, you can always change applications, even when you are at a remote location. When you update items with your phoneset, you use two services: Voice Item Maintenance and Fax Item Maintenance.

Archive and restore applications

When you archive applications, you preserve their information. If you need to recover applications or move them to another server, simply restore them.

How online updating affects application maintenance

Introduction

Whenever you change an application, using either Application Builder or telset maintenance, callers do not experience the changes until you save the application. Before you update applications, you must understand both when and how those updates affect callers.

Definition: Online updating

Online updating means that you can edit applications even while callers use them. Because editing and using can take place simultaneously, callers become aware of the changes only when they call the application again.

When callers become aware of updates

Callers encounter changes in applications only after you save them. Therefore, callers always use the last saved version of an application for an entire call and never experience updates in the middle of a call. They experience the updates the next time they call the application.

How online updating affects telset maintenance

Online updating is not different for applications updated by telset maintenance. However, you can change only voice and fax items using telset maintenance. Only after you update and save voice and fax items and then save the application in which they reside can callers access that application and experience the updated items.

Examples of online updating

The following examples of online updating show how it affects applications modified both by Application Builder and telset maintenance.

Example 1

An application contains an Announcement block and a Thru-Dial block. The Announcement block plays a non-interruptible greeting. Callers then move to the Thru-Dial block.

The greeting contains some important information plus instructions for using the Thru-Dial block. You decide to associate the important information with another Announcement block that appears earlier in the application. As well, you decide that the instructions should be interruptible for experienced callers. Therefore, you want to associate the instructions with the Thru-Dial block which, by default, can be interrupted.

A caller accesses the application a few seconds before you begin editing it. While she is listening to the non-interruptible greeting, you delete its Announcement block. You add the information to the voice item associated with the earlier Announcement block. You also associate a voice item made up only of instructions with the Thru-Dial block. The caller is never aware of these changes. She experiences only the last saved application.

You save and exit from the application. As you do so, the caller reaches the voice mailbox of the person she dialed. Instead of leaving a message, she decides to call the application again and dial another person. This time, she accesses the updated application. When she reaches the Thru-Dial block, the caller interrupts its instructions and dials the other person's phone number.

Example 2

You maintain applications for a company that sells swimming pools and supplies. One night, your supervisor calls you at home and informs you that you must change the fax that lists available chemicals immediately because the sales representatives are at a conference and need the information. Your supervisor faxes you the updated list.

You call Fax Item Maintenance. You specify both the appropriate application and the fax item by ID. Then, you scan the updated list into the item.

While you are scanning the fax, a sales representative calls the application to get the list. You save the fax item and the application before he selects the list. However, he receives the out-of-date list because he accessed the application while you were editing it, but before it was saved.

The sales representative calls to complain that the list has not been updated. You explain that he did not get an updated list because he called while you were making the changes. After the new list is available, you can advise all sales representatives to pick up the new list.

Section B: Checking and printing application details

In this section

Checking and printing application details

Introduction

Check and print application details to get both general and specific information about an application. The information helps you to maintain applications onsite or from a remote site. Also, the information lets you communicate changes to other administrators.

Why you check an application's details

You check an application's details to find out general information, such as the application's ID, customer number, description, and level of completeness while in the application. In particular, updating the description and knowing the level of completeness help you with administrative tasks.

Description
When you maintain or edit an application, update its description. You can write information about the application's use and configuration. As well, you can identify what changes you make to an application to prevent others from making the same changes.

Completeness
When you check an application's details, you can quickly see whether the application is complete. Otherwise, you must look at the application's flow and ensure that none of its blocks have a pink border. After you know that an application is complete, you can export it or add it to the SDN Table.

Types of print documents

You can print three types of documents for an application:

- application flow
- block details
- voice and fax item

Application flow document

Print an application flow document to see an application's graphical layout. By looking at the layout, you can see which blocks make up the application and how they connect to one another.

Block details document

Print the block details document to find out the configuration of each block in an application. In the header of each page, you see the page number and the application's name and ID. Used with the application flow document, the block details document gives you detailed information about a particular block in an application.

For example, if you want to find out about an application's Thru-Dial block, use the block details document. In the document, you find which voice item (and its name and ID) plays when callers reach the block, which type of dialing is allowed, and if left-pad digits and variable-length numbers are set up. If they are set up, you also learn the numerals specified for them.

Voice and fax item document

Print an application's voice and fax item document to find out information about each voice and fax item in the application. The document lists each item's name, ID, and description. The description of a voice item is its script. The description of a fax item is the script of its confirmation prompt plus the file name of its fax.

Why you print an application

Because of the levels of detail provided in the three documents, you can share tasks with other administrators. As well, you can easily perform telset maintenance by always having information about voice and fax items on hand.

For details on how to print, see the online Help for Application Builder.

Checking application details

Introduction

When you check the details of an application, you learn its status. When you include a description of the application, you can advise others of the application's status. A voice recording of the application's title lets telset maintenance users easily identify the application. You can also configure whether pasting and deleting in an application requires confirmation.

Getting there CallPilot Administration Client > CallPilot system > System Administration > Service Administration > Application Builder > application window

To set confirmation for a paste and delete

On the Options menu, click Confirm Paste/Delete so that a check mark appears beside the selection.

To cancel confirmation for a paste and delete

On the Options menu, click Confirm Paste/Delete so that the check mark beside the selection disappears.

To see an application's name, ID, and description

1   On the File menu, click Properties.

2   Click the General tab.

3   Click OK to return to the application window.

To edit the description of an application

1   On the File menu, click Properties.

2   Click the General tab.

3   In the Description box, select the existing text, and then type new
       information about the application.

4   Click OK to return to the application window.

To check whether an application is complete

1   On the File menu, click Properties.

2   Click the General tab.

3   If the Complete box says Yes, you can export or install the application.

4   Click OK to return to the application window.

To check whether an application is exported

1   On the File menu, click Properties.

2   Click the General tab.

3   If the Exported box says Yes, the application has already been exported.

4   Click OK to return to the application window.

To check locked applications

1   On the File menu, click Locks.

2   Look at the list of applications.

3   Click Done to return to the application window.

To record a title for an application

1   On the File menu, click Properties.

2   Click the General tab.

3   Click Record through phoneset.

4   In the Specify Phoneset box, type the number of the phoneset you want to use for recording.

5   Click Dial.

6   Answer the phoneset when it rings.

7   Click Record.

8   Speak the title of the application.

9   Click Stop.

10   If you are happy with the recording, click Done and go to step 12.

11   If you are unhappy with the recording, repeat steps 6 through 9.

12   Hang up the phoneset.

13   Click OK to return to the application window.

To import a file that contains the title of an application

1   On the File menu, click Properties.

2   Click the General tab.

3   Click Import from .WAV file.

4   Select the file that contains a recording of the application's title.

5   Click Open.

6   Click OK to return to the application window.

See also

For information about application IDs, see "Creating, saving, and closing applications" on page 69.

For information about telset maintenance, see "Understanding telset maintenance" on page 350.

To lock and unlock applications, see "Opening applications" on page 72.

To make recordings, see Chapter 6, "Working with voice recordings."

Printing application details

Introduction

You can print the complete layout of an application, or you can print details of its blocks, fax items, and voice items. The application's layout prints as a hard-copy flowchart. When you use borders, you can easily join a flowchart that spans more than one page. When you print details, you always have information on hand for telset maintenance.

Getting there CallPilot Administration Client > CallPilot system > System Administration > Service Administration > Application Builder > application window

To edit the printer settings

1 On the File menu, click Print Setup.

2 Adjust any printer settings.

3 Click OK to return to the application window.

To turn a border on or off for application printouts

On the Options menu, click Print Frame so that a check mark appears beside the selection.

To print the layout of an application

1 On the File menu, click Print Flow.

2 Adjust any printer settings.

3 Click OK to print the contents of the application window and return to the application window.

To print details for all the blocks in an application

1   On the File menu, click Print Block Details.

2   Adjust the appropriate printer settings.

3   Click OK to print the details and return to the application window.

To print details for all the voice and fax items in an application

1   On the File menu, click Print Voice/Fax Items.

2   Adjust the appropriate printer settings.

3   Click OK to print the details and to return to the application window.

To print an application from another location

You can print an application on another PC if the client you are working from is not connected to a printer.

1   Save the application in a TIFF format.

2   Copy it to a disk or send it via email to the desired location.

3   Print the application using a fax viewing software.

Saving an application to a TIFF format

1   Within the application, select one of the Print options from the File menu.

   Result: The print dialog box appears
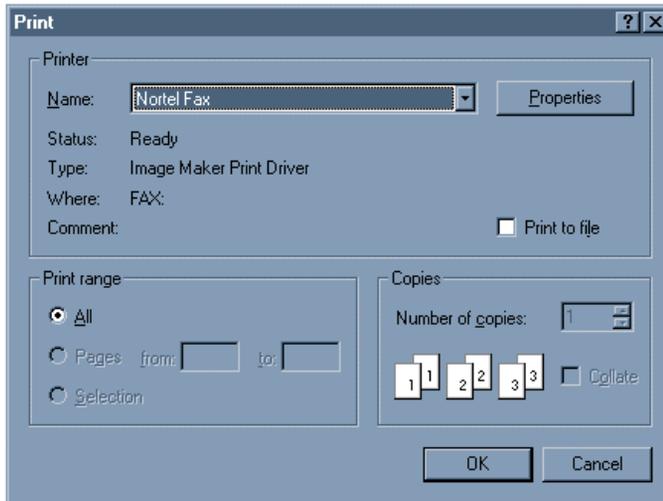
2   Select the Nortel Fax print driver.

3   Click ok.

   Result: The Compose Fax dialog box appears

4   Select Save As from the SAVE this fax a file box.

Result: The Save As dialog box appears.
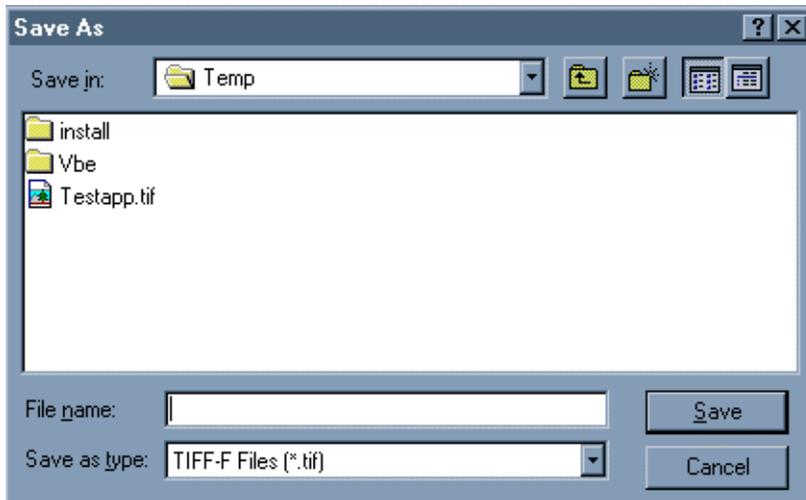
5 Type in the name for the file.

6 Select the location where you want to save the file.

7 Click Save.

Result: The Come Fax dialog box reappears.

8 Click Cancel from the CANCEL this fax box. The dialog box disappears and the applications appear.

Printing the application from a TIFF format

1 Locate the TIFF file.

2 Double-click on the file.

Result: The file open using the fax viewing software.

3 Under the File menu, select Print.

Result: The file prints.

See also

For information about blocks, see Chapter 4, "Understanding blocks."

For information about different types of printouts, see "Checking and printing application details" on page 338.

For information about voice items, see Chapter 6, "Working with voice recordings."

For information about fax items, see Chapter 7, "Working with faxes."

Section C: Using telset maintenance

In this section

Understanding telset maintenance

Introduction

Telset maintenance lets you keep voice and fax items up to date in applications by using your phoneset. You can always change applications, even when you are at a remote location. When you maintain items with your phoneset, you use two services. To access these services, you require a password.

Telset maintenance password

The telset maintenance password gives you access to the two maintenance services. Define this password in Application Builder.

The two maintenance services

To keep an application's voice and fax items up to date, use two services:

- Voice Item Maintenance
- Fax Item Maintenance

Voice Item Maintenance

Voice Item Maintenance enables you to edit the voice items in applications by using your phoneset. To use Voice Item Maintenance, you must know the telset maintenance password, the ID of the application in which a voice item resides, and the ID of the voice item that you want to edit.

Difference between Voice Item Maintenance and Voice Prompt Maintenance

Voice Item Maintenance in CallPilot replaces Voice Prompt Maintenance in Meridian Mail Voice Services.

In Meridian Mail Voice Services, you used Voice Prompt Maintenance to edit your voice prompts but not your announcements. Application Builder makes no distinction between voice prompts and announcements. They are both known as voice items. You can use Voice Item Maintenance to edit any voice item with a phoneset.

Fax Item Maintenance

Fax Item Maintenance allows you to edit the fax items in applications by using your phoneset. To use Fax Item Maintenance, you must know the telset maintenance password, the ID of the application in which a fax item resides, and the ID of the fax item that you want to edit.

Why use the Voice Item Maintenance and Fax Item Maintenance services

When you use these services, you do not have to wait until you return to the office in order to update an application.

For example, use Voice Item Maintenance if you cannot make it in to the office because of a snowstorm. Update the greeting of your company's main application to inform callers that the office is closed because of inclement weather.

Use Fax Item Maintenance if you find faxes at home that you want to use for fax items. If you do not have a soft copy of a fax, it is easier to receive its hard copy with Fax Item Maintenance. Use your faxphone to call Fax Item Maintenance, and then you scan the faxes into the correct fax items.

See also

To create voice items, see Chapter 6, "Working with voice recordings."

For information about creating fax items, see Chapter 7, "Working with faxes."

Defining the telset maintenance password for an application

Introduction

Define the telset maintenance password for an application to ensure people who know that password can use Fax Item Maintenance and Voice Item Maintenance to edit the application.

The minimum length for a password is defined in the Security Administration program.

For each application, you must configure a telset maintenance password on the Security tab of the File Properties sheet.

Getting there CallPilot Administration Client > CallPilot system > System Administration > Service Administration > Application Builder > application window

To define the telset maintenance password for an application

1   On the File menu, click Properties.

2   Click the Security tab.

3   Make sure the Telset maintenance password check box is selected.

4   In the Telset maintenance text box, type a new password.

5   In the Password confirmation box, type the password again to verify it.

6   Click OK to return to the application window.

Using Voice Item Maintenance

Introduction

Before you use Voice Item Maintenance, configure a telset maintenance password on the Security tab of the File Properties sheet for each application that you want to edit.

To use Voice Item Maintenance, you need to know

- the number to dial to reach the service
- the ID and telset maintenance password of the application you want to edit
- the IDs of the voice items

In Application Builder, you can print application details, such as IDs, so that you always have them available.

Note: You cannot use Voice Item Maintenance to edit an application that is open in Application Builder.

To log on to Voice Item Maintenance

1   Dial Voice Item Maintenance.

2   Enter the ID of the application that you want to edit, and then press number sign (#).

3   Enter the telset maintenance password for the application, and then press number sign (#).

After you log on

After you log on to Voice Item Maintenance, what you hear depends on how many voice items the application contains. If the application contains only a single voice item, you hear its ID. If the application contains multiple voice items, you are asked for the ID of a voice item.

To identify a voice item

Enter the ID of the voice item, and then press number sign (#).

To record a voice item

1   Press 5.

2   Speak what you want to record.

3   Press number sign (#).

4   To listen to the recording, press 2.

5   To rerecord, follow steps 1 to 3.

6   To delete the recording, press 76.

To select another voice item

1   Press 6.

2   Enter the ID of the voice item, and then press number sign (#).

To select another application

1   Press 81.

2   Enter the ID of the application, and then press number sign (#).

To change the telset maintenance password

Note: The minimum length for a password is defined in the Security Administration program.

1   Press 84.

2   Enter the old password, and then press number sign (#).

3   Enter the new password, and then press number sign (#).

4   Enter the new password again, and then press number sign (#).

To exit Voice Item Maintenance

Press 83.

See also

For information about the telset maintenance password, see "Defining the telset maintenance password for an application" on page 352.

For information about printing application details, see "Checking and printing application details" on page 338.

Using Fax Item Maintenance

Introduction

Before you use Fax Item Maintenance, configure on the Security tab

- a telset maintenance password for each application
- whether Fax Item Maintenance users can change the fax verification number and the confirmation prompts of fax items

Telset maintenance password

You must configure a telset maintenance password on the Security tab for each application that you want to edit. Both Fax Item Maintenance and Voice Item Maintenance users use the same password to access an application.

Fax verification number

The fax verification number is the phone number of the fax machine to which Fax Item Maintenance sends a copy of the document just scanned for a fax item. This copy is a verification fax.

Make sure Fax Item Maintenance users can change the fax verification number if they are using fax machines other than the one indicated on the Security tab.

Confirmation prompts

Confirmation prompts are voice recordings that give callers information about a fax.

Consider whether you want Fax Item Maintenance users to modify confirmation prompts. Instead, you might want one voice for all confirmation prompts used in the application.

Other things to consider

To use Fax Item Maintenance, consider the following points:

- Know which number to dial to reach Fax Item Maintenance. If you do not know the number, ask your system administrator.

- Call Fax Item Maintenance from a faxphone.

- You cannot use Fax Item Maintenance to edit an application that is open in Application Builder.

- Know the ID and telset maintenance password of the application you want to edit plus the IDs of its fax items. In Application Builder, you can print application details like IDs so you can always have them available.

To log on to Fax Item Maintenance

1   Dial Fax Item Maintenance.

2   Enter the ID of the application that you want to edit, and then press number sign (#).

3   Enter the telset maintenance password for the application, and then press number sign (#).

After you log on

After you log on to Fax Item Maintenance, what you hear depends on how many fax items the application contains and whether you can modify their confirmation prompts. If the application contains only a single fax item, you hear its ID. If the application contains multiple fax items, you are asked for the ID of a fax item.

To identify a fax item

Enter the ID of the fax item, and then press number sign (#).

To scan a document for a fax item

Note: Fax Item Maintenance ends when you scan a document to be used as the fax for a fax item. If a fax item's confirmation prompt can be modified, record or edit it before you scan so that you do not have to call Fax Item Maintenance again after you scan.

1   Press 9.

Result: If the fax verification number can be modified, you can change the number to which the fax sends. If the number cannot be modified, go to step 5.

2   To send the fax to the default fax verification number, press 1.

3   To send the fax to another fax verification number, press 2.

4   Enter the new number, and then press number sign (#).

5   Put the document in the fax machine.

6   Press the Send key on the fax machine.

Result: The fax transmits and Fax Item Maintenance ends.

Document transmission

If a document does not scan properly, then Fax Item Maintenance sends an error message rather than a verification fax to the fax verification number.

To record a confirmation prompt for a fax item

1   Press 5.

2   Speak what you want to record.

3   Press number sign (#).

4   To listen to the prompt, press 2.

5   To delete the prompt, press 76.

To select another fax item

1   Press 6.

2   Enter the ID of the fax item, and then press number sign (#).

To select another application

1   Press 81.

2   Enter the ID of the application, and then press number sign (#).

To change the telset maintenance password

Note: The minimum length for a password is defined in the Security Administration program.

1   Press 84.

2   Enter the old password, and then press number sign (#).

3   Enter the new password, and then press number sign (#).

4   Enter the new password again, and then press number sign (#).

To exit from Fax Item Maintenance

Press 83.

See also

For information about the telset maintenance password, see "Defining the telset maintenance password for an application" on page 352.

For information about printing application details, see "Checking and printing application details" on page 338.

Section D: Archiving and restoring applications

In this section

How to archive and restore applications

Introduction

Archive applications to preserve their information. You also archive and restore to move applications from one volume ID or server to another. To move applications, archive one volume ID's or server's applications and then restore them on another volume ID or server.

Archiving applications

When you archive, you choose the type of archive to use and select the applications to include.

Which type of archive to use

You can archive all your applications or only individual ones. However, you do not need to restore all applications in an archive. Instead, you can restore only the archived applications that you want.

Choose which applications to archive by name or by ID

While you can choose which applications to archive by name or by ID, you should archive all of your applications. Always consider imported applications' interdependence on the applications that import them. Accordingly, archive an application and all of its imported applications.

When you restore applications

After you archive applications, you restore them on a system. Then you open each application in Application Builder and save it before you install it in the SDN Table. When you open an application, you see whether it is incomplete. An Unavailable block makes an application incomplete.

Why the Unavailable block appears

The Unavailable block appears in an application when something is wrong with the way in which it was archived and restored:

- The imported applications were not archived or restored on the system, and the application in which they reside was archived and restored. As a result, an Unavailable block appears instead of the imported applications.

- An application that contains fax functionality was archived and restored on a system without fax capability. Therefore, an Unavailable block appears in place of each of the application's fax-related blocks.

How to eliminate the Unavailable block

To eliminate the Unavailable block, determine why it appears. Follow one process if an application has lost fax capability, and follow a different process if an application has lost imported applications.

Getting there   CallPilot Administration Client > CallPilot system > System Administration > Service Administration > Application Builder > application window

To fix an application with lost fax capability

1   Open the application.

2   Search for any Unavailable blocks.

3   Delete the Unavailable blocks.

4   Reconnect and reconfigure other blocks to make the application complete.

To fix an application with lost imported applications

1   Locate the imported applications.

2   Archive and restore the applications on the same system as the application that imports them.

Irretrievable imported applications

If you cannot locate the imported applications, you must follow the process that you follow for an application with lost fax capability. In an application with missing links, delete the Unavailable blocks and reconfigure and reconnect the application until it is complete. An application without imported applications might not be of use, depending on the functions those imported applications supplied.

Chapter 11

Troubleshooting

In this chapter

Application Builder cannot run

Introduction

To run on a client, Application Builder depends on services that run on the server. If those services are not running or if the server has crashed, then Application Builder cannot run.

Required services

To run, Application Builder requires the following server services:

- Administration Server
- Security Server
- Notification Server
- Volume Servers
- SQL Anywhere database

How to run Application Builder

How you get Application Builder to run depends on whether the server has crashed, a required service has crashed, or a required service is not running.

To run Application Builder after the server has crashed

1 Restart the server.

2 Run Application Builder.

To run Application Builder after a required service has crashed

1 Restart the service.

2 Run Application Builder.

To run Application Builder after a required service is not running

1   On the server, start the service.

2   Run Application Builder.

See also

For more information about running services on the server and restarting the server, see the installation guide for your server.

Client or server crashes

Introduction

Temporary applications are left on the client PC if either the client or the server crashes. After you recover from the crash, you cannot use those temporary applications. To use the applications again, you must restore them on the server.

Effect of a computer crash

All applications reside on the server. From clients, you open and edit applications. If a client or the server crashes while you are working on an application, you lose the connection with the server. A temporary version of the application remains on the client. No one else can open that application, because it is considered locked by that client.

How to restore an application

After you recover from a crash, you open Application Builder from the client on which you were working before the crash. As Application Builder opens, it prompts you to restore the application. Before the application can open, you must restore it.

Save the application immediately after it opens. When you save, the application transfers its information to the server and deletes the temporary version that was placed on the client because of the crash.

To restore an application

1   Run Application Builder.

2   When the system asks whether you want to restore the application, click Yes.

3   Save the application.

See also

For information about locked applications, see "Opening applications" on page 72.

Unavailable block appears in a restored application

Introduction

The Unavailable block indicates that a function is missing in a restored application.

Why the Unavailable block appears

The Unavailable block appears in an application when something is wrong with the way in which it was archived and restored:

- The imported applications were not archived or restored on the system, and the application in which they reside was archived and restored. As a result, an Unavailable block appears instead of the imported applications.

- An application that contains fax functionality was archived and restored on a system without fax capability. Therefore, an Unavailable block appears in place of each of the application's fax-related blocks.

How to eliminate the Unavailable block

To eliminate the Unavailable block, determine why it appears. Follow one process if an application has lost fax capability, and follow a different process if an application has lost imported applications.

Getting there   CallPilot Administration Client > CallPilot System > System
Administration > Service Administration > Application Builder

To fix an application with lost fax capability

1   Open the application.

2   Search for any Unavailable blocks.

3   Delete the Unavailable blocks.

4   Reconnect and reconfigure other blocks to make the application complete.

To fix an application with lost imported applications

1   Locate the imported applications.

2   Archive and restore the applications on the same system as the application that imports them.

Irretrievable imported applications

If you cannot locate the imported applications, you must follow the process that you follow for an application with lost fax capability. In an application with missing links, delete the Unavailable blocks and reconfigure and reconnect the application until it is complete. An application without imported applications might not be of use, depending on the functions those imported applications supplied.

See also

For information about archiving and restoring, see the *System Administration Guide*.

Appendix A

Sample applications

In this appendix

Section A: Applications for educational institutions

In this section

The University of City main menu

Introduction

The main menu of the University of City directs calls to the university's main telephone number at different times and on different days. Because of the university's location, the main menu also supports bilingual callers.
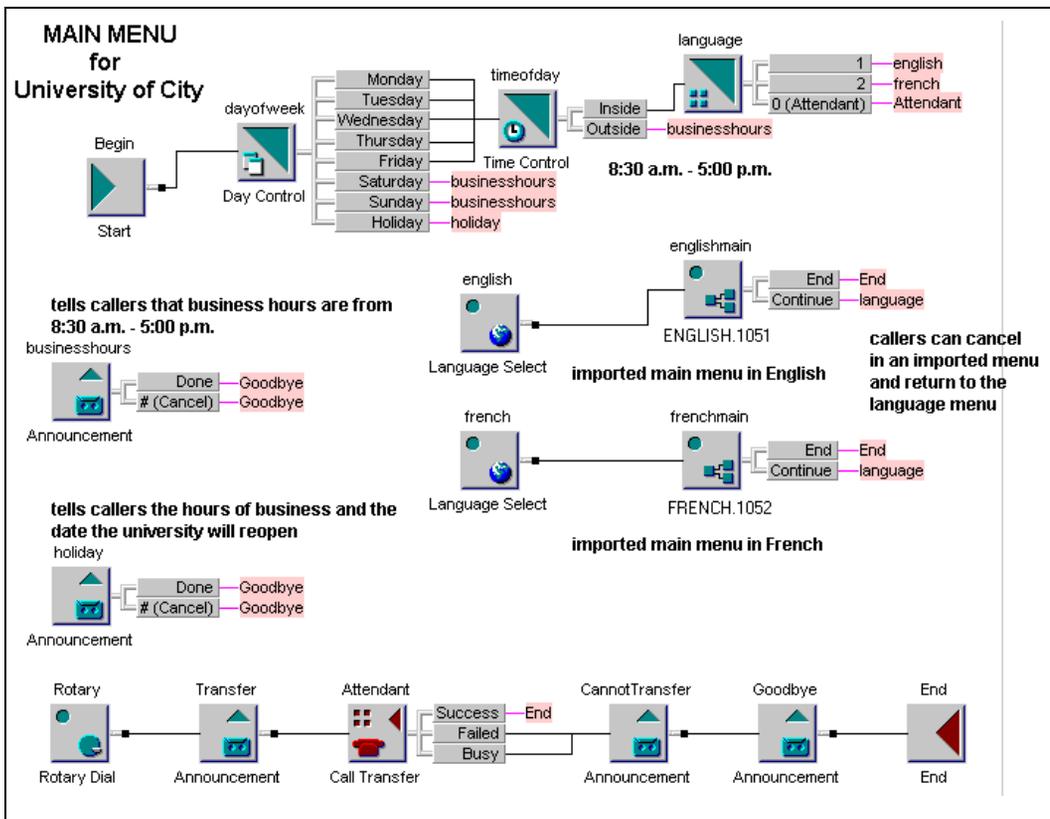
Description of the university's main menu

The main menu directs callers according to the day of the week and the time of day. After business hours (8:30 a.m. to 5:00 p.m.) and on weekends and holidays, callers hear an appropriate announcement. During business hours, they choose to hear the rest of the application in either English or French.

Two imported applications—an English menu and a French menu—appear in the main menu. While in either imported application, callers can press the Cancel (#) key and return to the main menu to choose a language. Both imported applications contain the same functions. Their only difference is language.

The University of City English menu

Introduction

If callers press 1 or 2 while in the main menu of the University of City, they go to the English or French menu, respectively. The English menu, like the French menu, directs callers through the various faculties and services of the university.
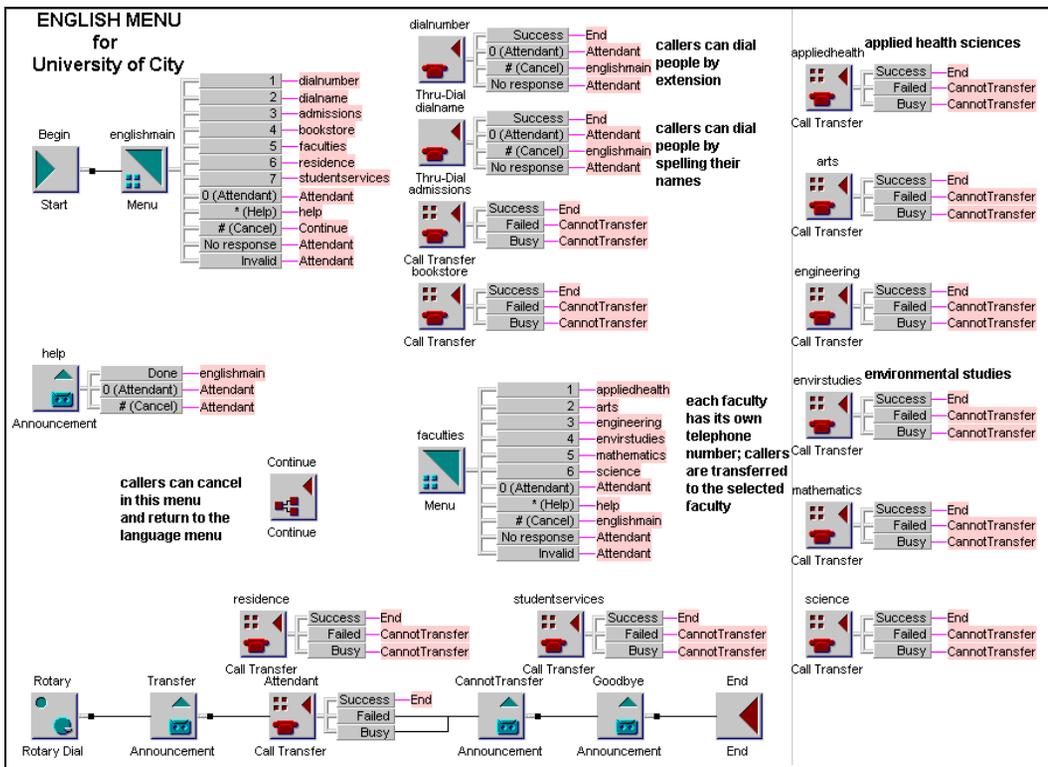
Description of the university's English menu

The English menu enables callers to

- dial staff by name or number
- transfer to such services as the bookstore

- select another menu that directs them to one of the six faculties

Callers transfer to the faculty of their choice. If any transfer fails, callers hear an explanation before the application ends.

The English menu anticipates which keys, other than the menu keys, callers may press. If callers press the Cancel (#) key, they return to the main menu and the Menu block named "language." If they press the Help (*) key, they hear detailed instructions about what they should do. If they press the Attendant (0) key, they transfer to an attendant. Callers also transfer to an attendant if they do not respond or if they make too many invalid choices.

The Faculty of Arts application

Introduction

If callers press 2 while in the Menu block named "faculties" of the English menu, they transfer to the Faculty of Arts. The faculty's application directs callers to one of nine departments.
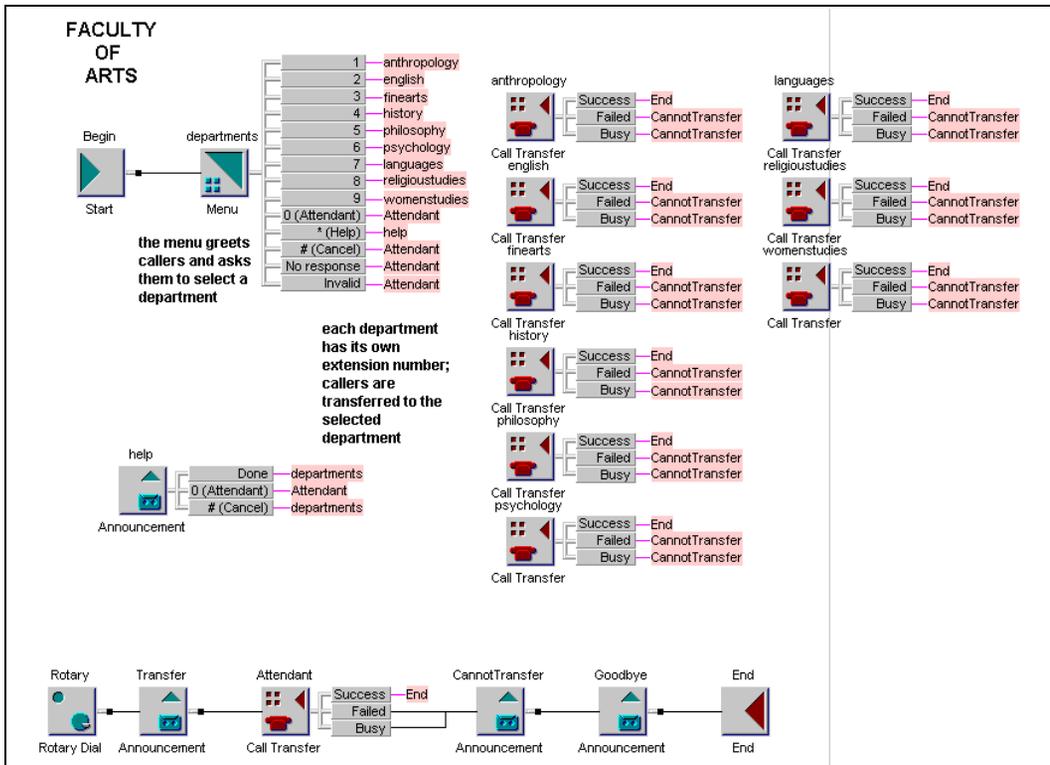
Description of the Faculty of Arts application

From the Menu block called "departments," callers can transfer to one of the following departments: Anthropology, English, Fine Arts, History, Philosophy, Psychology, Language, Religious Studies, and Women's Studies. Each department has its own phone number. If any transfer fails, callers hear an explanation before the application ends.

Like the English menu, the Arts application anticipates which keys other than the menu keys callers can press. If callers press the Cancel (#) key, they return to the main menu and its Menu block named "language." If callers press the Help (*) key, they hear detailed instructions about what they should do. If callers press the Attendant (0) key, they are transferred to an attendant. They also transfer to an attendant if they do not respond or if they make too many invalid choices.

The Religious Studies department menu

Introduction

From the Faculty of Arts application, you can transfer to the Religious Studies department. The Religious Studies department observes the University of City's holidays, but it also observes holidays for each of the four religions of study: Christianity, Judaism, Islam, and Hinduism. The application for the department must direct callers appropriately on either a university or a religious holiday.
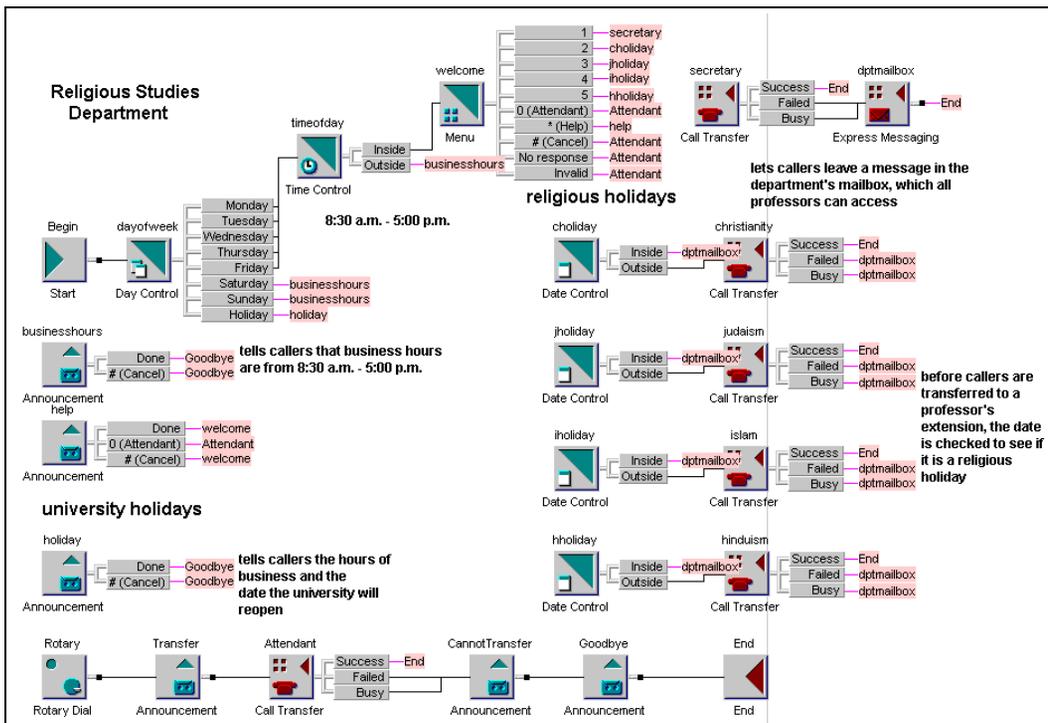
Description of the Religious Studies department menu

Because callers can dial the Religious Studies department directly, the application routes callers in the same way that the University of City's main menu does for business hours, nonbusiness hours, and university holidays.

The Religious Studies Department also directs callers on religious holidays. During business hours and on religious holidays that do not coincide with university holidays, callers reach the department's secretary. Before callers transfer to one of the department's four professors, the menu checks whether the day is a holiday. If it is, callers transfer to the department mailbox where they leave a message. All the professors use the mailbox. If the day is not a holiday, callers transfer to the professor for the selected religion.

Callers also transfer to the department mailbox if any transfer fails or if a line is busy.

Section B: Applications for a hospital

In this section

The Mount Sinai Hospital main menu

Introduction

The main menu of Mount Sinai Hospital directs calls from both external callers and staff. The application contains two distinct flows. The flow for staff is password-protected.
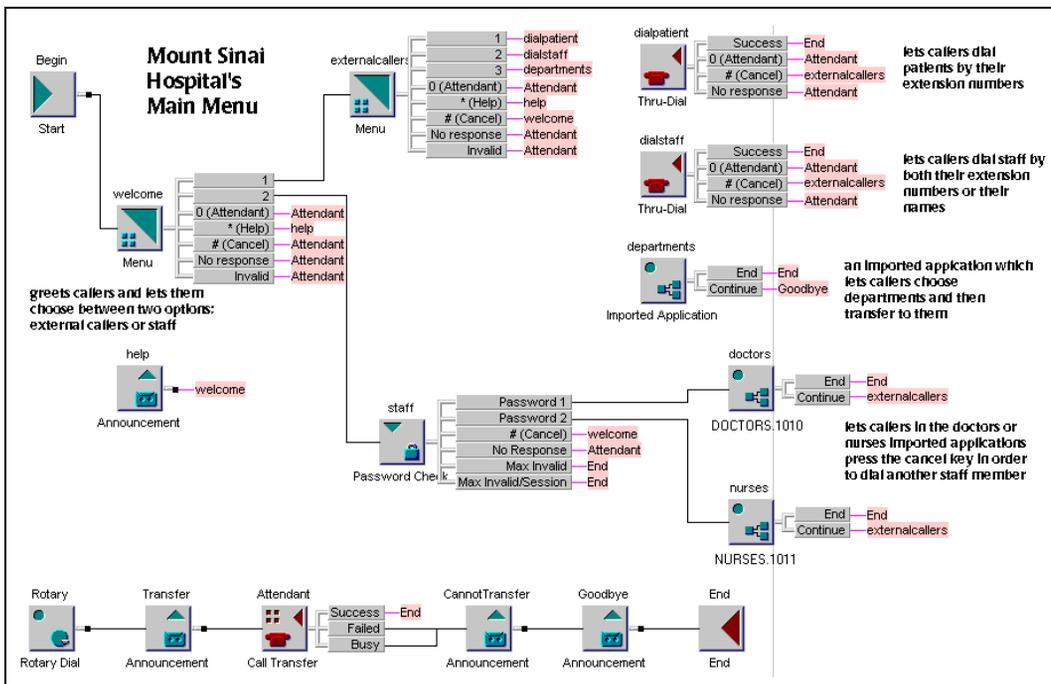
Description of the hospital's main menu

The Mount Sinai Hospital main menu greets callers and directs external callers to press 1 and staff to press 2. Because staff need access to different information, they must enter a password to identify themselves before hearing their options.

After external callers press 1, they can choose to dial a patient by extension number or a staff member by extension number or name. As well, they can choose to hear a list of departments in the hospital. All of the departmental information, which is made up of many menus, is contained in an imported application.

After staff enter a password which identifies them as a doctor or a nurse, they are passed to the appropriate imported application. Both the application for doctors and the application for nurses contain similar functionality.

Throughout the application, callers press the Attendant (0), Help (*), and Cancel (#) keys. In the application, invalid choices and no responses pass to an attendant.

The Mount Sinai Hospital menu for nurses

Introduction

If Mount Sinai staff members enter the password for nurses in the main menu, they pass to the imported application titled "nurses." This application contains more Menu blocks. The application also represents the types of options available in the "doctors" imported application. The "nurses" application ensures that nursing staff can retrieve and communicate essential information.
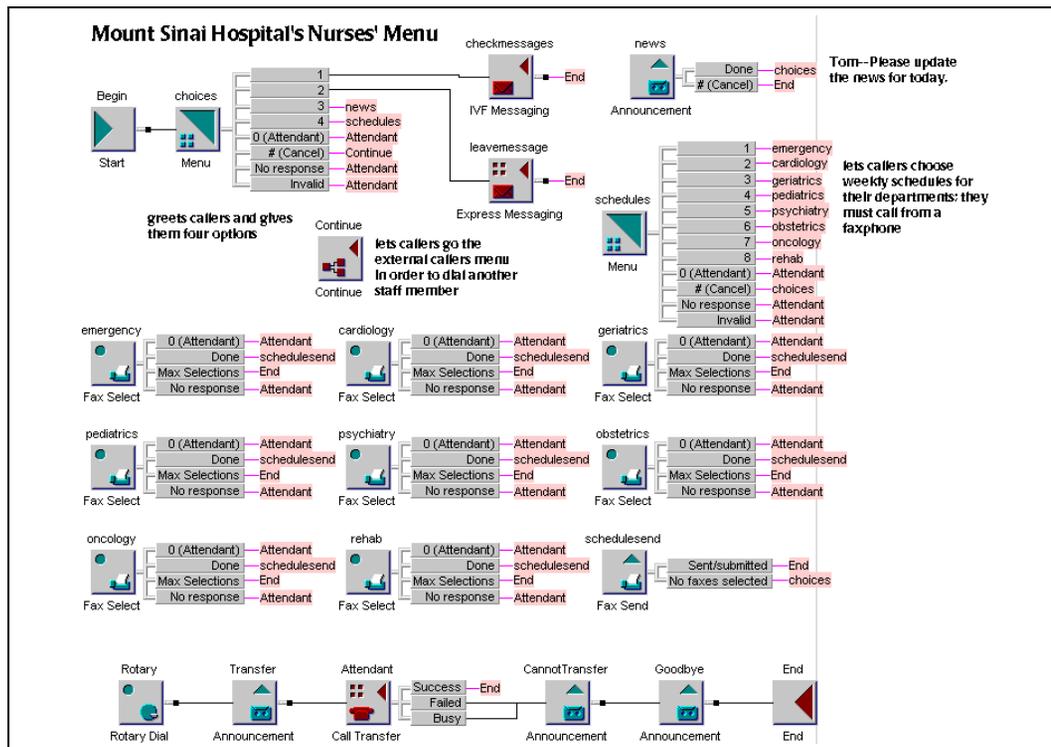
Description of the menu for nurses

From their menu, nurses can access their mailboxes and leave messages for other staff members via Express Voice Messaging. They can also hear an announcement that highlights daily information, such as a staff shortage in a particular department. Nurses can call from a faxphone and retrieve the weekly schedule for a department by fax.

Because nurses use the menu daily, no Help is provided. However, if nurses make too many invalid choices, do not respond, or press the Attendant (0) key, they pass to the attendant.

If nurses press the Cancel (#) key while in the Menu block titled "choices," they go to the Menu block titled "external callers" in the main menu application. Canceling lets them go to a menu from which they can dial staff members.

Section C: Application for a sales company

In this section

The ABC Company main menu

Introduction

Customers call the main menu of ABC Company to receive product information
or speak to staff. Staff often call the menu to place toll-free calls when they are
on the road. The main menu allows various types of Thru-Dials and gives
customers and staff access to different information.

Description of ABC Company's main menu

The first Menu block, "mainmenu," greets callers and ensures they identify
themselves as either customers or staff. Customers are then directed to a list of
options. Staff must enter a password to use their area of the application.

The application presents customers with two options: to contact staff members by dialing their extension numbers or names, or to retrieve a list of ABC Company's products.

After staff enter their password, they choose between two options. They can receive one of the various lists of information. Like customers, staff can obtain a product list. However, their product list contains more sensitive information, such as wholesale prices and the names of third-party manufacturers. Staff can also retrieve information about inventory and customers.

As their second option, staff can dial a number. Before they dial the number, they enter a password that determines the type of Thru-Dial they are allowed. For example, salespeople can make only local calls while the manager can make international calls.

Both the customer and staff menus let callers dial an attendant or reach an attendant if they make too many invalid choices or do not respond. Unlike the staff menu, the customer menu gives callers help if they press the appropriate key.

Index

A

E

G

H

I

W

CallPilot
Application Builder Guide

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How the world shares ideas.