



Nortel CallPilot

Voice Forms Transcriber User Guide

Document status: Standard
Document version: 01.04
Document date: 27 April 2007

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- Please use the connecting cables, power cord, and AC adaptors shipped with the equipment or specified by Nortel to be used with the equipment. If you use any other equipment, it may cause failures, malfunctioning or fire.
- Power cords shipped with this equipment must not be used with any other equipment. If the above guidelines are not followed, it may lead to death or severe injury.

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The following applies to server models 703t, 201i, 1002rp, 1005r and 600r:

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This is a Class A product based on the standard of the Voluntary Control Council for Interference by Information Technology Equipment (VCCI). If this equipment is used in a domestic environment, radio disturbance may occur, in which case, the user may be required to take corrective action.

Publication History

April 2007

Standard 01.04 of the CallPilot 5.0 *Voice Forms Transcriber User Guide* is issued for general release.

April 2007

Standard 01.03 of the CallPilot 5.0 *Voice Forms Transcriber User Guide* is issued for general release.

April 2007

Standard 01.02 of the CallPilot 5.0 *Voice Forms Transcriber User Guide* is issued for CR review.

March 2007

Standard 01.01 of the CallPilot 5.0 *Voice Forms Transcriber User Guide* is issued for general release.

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How to get Help

This section explains how to get help for Nortel products and services.

Getting Help from the Nortel Web site

The best way to get technical support for Nortel products is from the Nortel Technical Support Web site:

<http://www.nortel.com/support>

This site provides quick access to software, documentation, bulletins, and tools to address issues with Nortel products. More specifically, the site enables you to:

- download software, documentation, and product bulletins
- search the Technical Support Web site and the Nortel Knowledge Base for answers to technical issues
- sign up for automatic notification of new software and documentation for Nortel equipment
- open and manage technical support cases

Getting Help over the phone from a Nortel Solutions Center

If you don't find the information you require on the Nortel Technical Support Web site, and have a Nortel support contract, you can also get help over the phone from a Nortel Solutions Center.

In North America, call 1-800-4NORTEL (1-800-466-7835).

Outside North America, go to the following Web site to obtain the phone number for your region:

<http://www.nortel.com/callus>

Getting Help from a specialist by using an Express Routing Code

To access some Nortel Technical Solutions Centers, you can use an Express Routing Code (ERC) to quickly route your call to a specialist in your Nortel product or service. To locate the ERC for your product or service, go to:

<http://www.nortel.com/erc>

Getting Help through a Nortel distributor or reseller

If you purchased a service contract for your Nortel product from a distributor or authorized reseller, contact the technical support staff for that distributor or reseller.

CallPilot Voice Forms and the transcription service

Introduction

The CallPilot Voice Forms application provides a simple, yet powerful, means of collecting information electronically. A voice form is an electronic equivalent of a paper form or questionnaire. A voice form contains a series of questions that is played to callers when they dial into the voice form service. Callers listen to each question and provide an answer. The set of answers is saved to the system in the form of a response. Voice forms are used for services such as credit card applications, registration forms, and customer complaints. Three groups of people are involved in the CallPilot Voice Forms application:

- the system administrator, who creates and maintains the voice forms on the CallPilot server
- the caller, who dials into the voice form service and answers the voice form questions over the telephone
- the transcriber, who retrieves, plays, listens, and transcribes caller responses

You can transcribe the responses in one of two ways:

- using the telephone
- using My CallPilot

Multiuser access to the transcription service

Many transcribers can access the same voice form at the same time, but only one transcriber can access a particular response. When you retrieve a response to transcribe, the system locks the response so that only you can transcribe this response. After you finish transcribing the response, you must delete it so that the response is not available to other transcribers.

Notification of responses

If you transcribe using the telephone, the system can notify you that you have responses to transcribe by your Message Waiting Indicator (MWI) on your telephone. A flashing MWI indicates that you have responses. When you play the message, the system indicates the voice form ID, the number of responses that you have, and the date that you receive the responses. When you finish transcribing all of your responses, the MWI stops flashing.

The system can also send a notification message to your mailbox. You can listen to the message using your telephone, or view the message using your desktop client or My CallPilot.

About this guide

The *CallPilot Voice Forms Transcriber User Guide* provides you with the basic information you need to know to transcribe using the telephone and using My CallPilot. To transcribe using the telephone, see the chapter "[Using the telephone to transcribe](#)" (page 15). To transcribe using My CallPilot, see the chapter "[Using My CallPilot to transcribe](#)" (page 29).

The *CallPilot Voice Forms Transcriber User Guide* describes procedures in the order that you are most likely going to use them. However, you can explore the procedures in the order that you prefer.

Important terms used in this guide

Three important terms used in this guide are answer, field, and response.

- An answer refers to the answer to one question in the voice form.
- A field is made up of three parts: before answer, answer, and after answer.
 1. Before answer, depending on how the administrator configures the system, is the spoken name of the field, a beep, or nothing (no pause).
 2. Answer is the caller's answer to a question.
 3. After answer, depending on how the administrator configures the system, is a system stop or a delay.
- A response contains the answers to all of the questions in a voice form.

Types of responses

There are two types of responses:

1. A new response is a response that the system saves after the caller completes the voice form and sends to a transcriber.
2. A special response is a response that a transcriber attempts to transcribe but does not successfully complete the transcription. In this

case, the transcriber marks the new response as special because the response requires further attention.

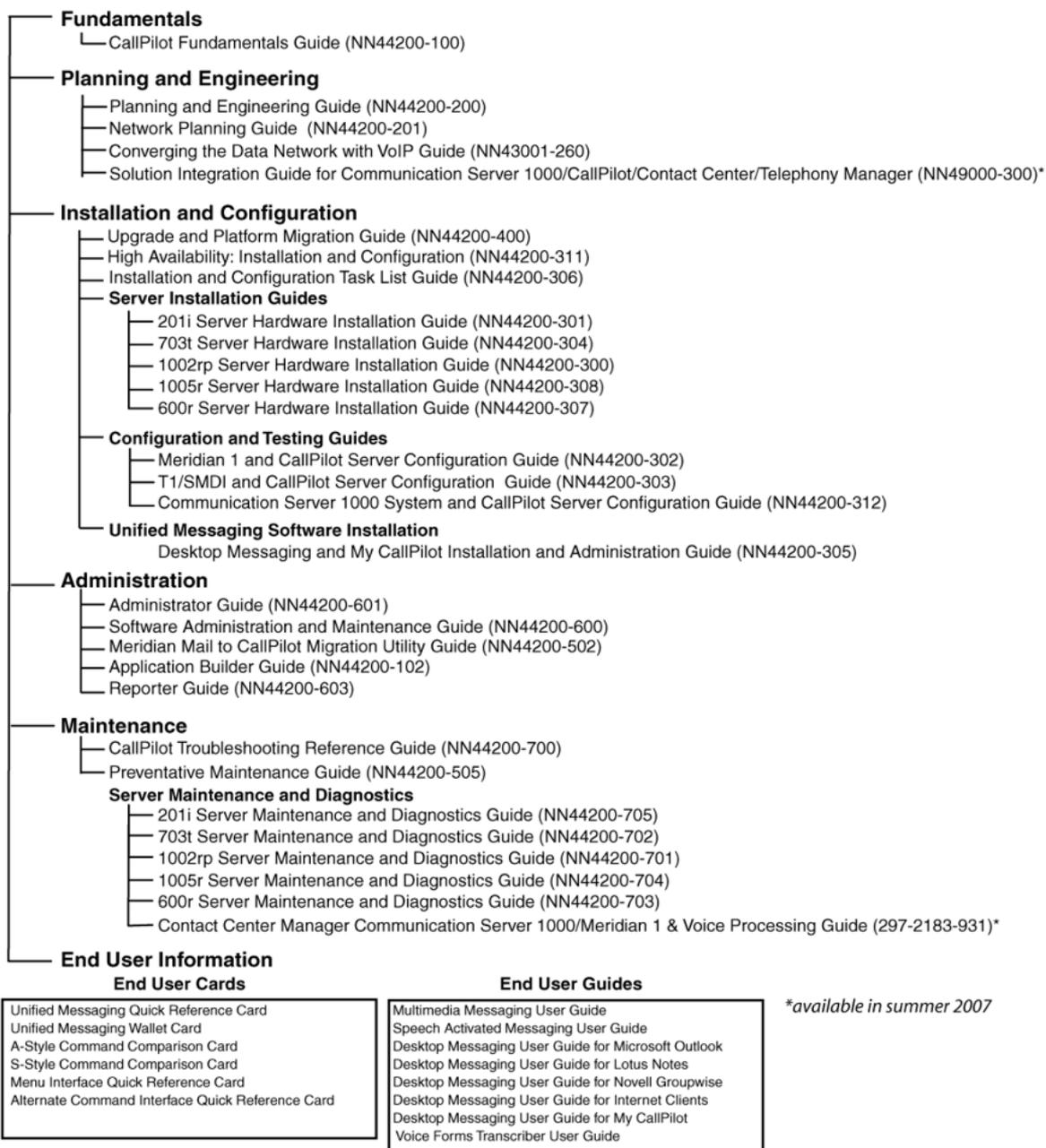
Note: When a transcriber retrieves a new or special response and begins transcribing, the system locks the response so that another transcriber cannot retrieve the response.

Reference documents

For a list of all CallPilot documents, see the following CallPilot Customer Documentation Map.



CallPilot Customer Documentation Map



**available in summer 2007*

Using the telephone to transcribe

Overview

The transcription service keyboard layouts on your telephone keypad for CallPilot Voice Forms are very similar to the Meridian Mail (MM) Voice Forms. When you press different keys on the keypad, you can perform all of the commands necessary to transcribe a caller response. If you are not familiar with MM Voice Forms, the Help service provides a series of system prompts to guide you through the transcription process.

Play mode and pause mode

The transcription service is in one of two modes: the play mode or the pause mode. When you play back a response, the service is in the play mode. The service goes into the pause mode when you press the pause key, or 2, during playback. Certain keys on the telephone keypad function differently depending on whether the service is in play mode or pause mode.

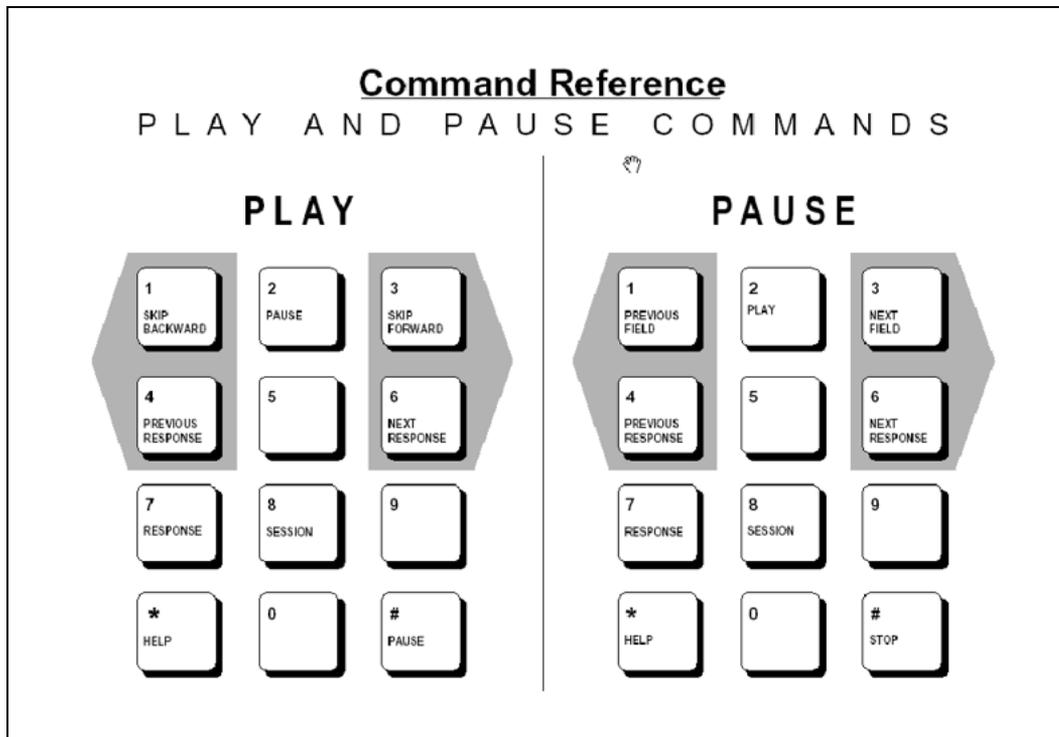
Types of commands

There are three types of commands: play and pause commands, response commands, and session commands.

Play and pause commands keypad layout

Figure 1

Play and pause commands keypad layout



Play and pause commands

Play and pause commands are single-digit commands. The following table shows various tasks and associated play and pause commands that are available on your keypad when the system is in play or pause mode. You can use these commands at different times when you transcribe responses.

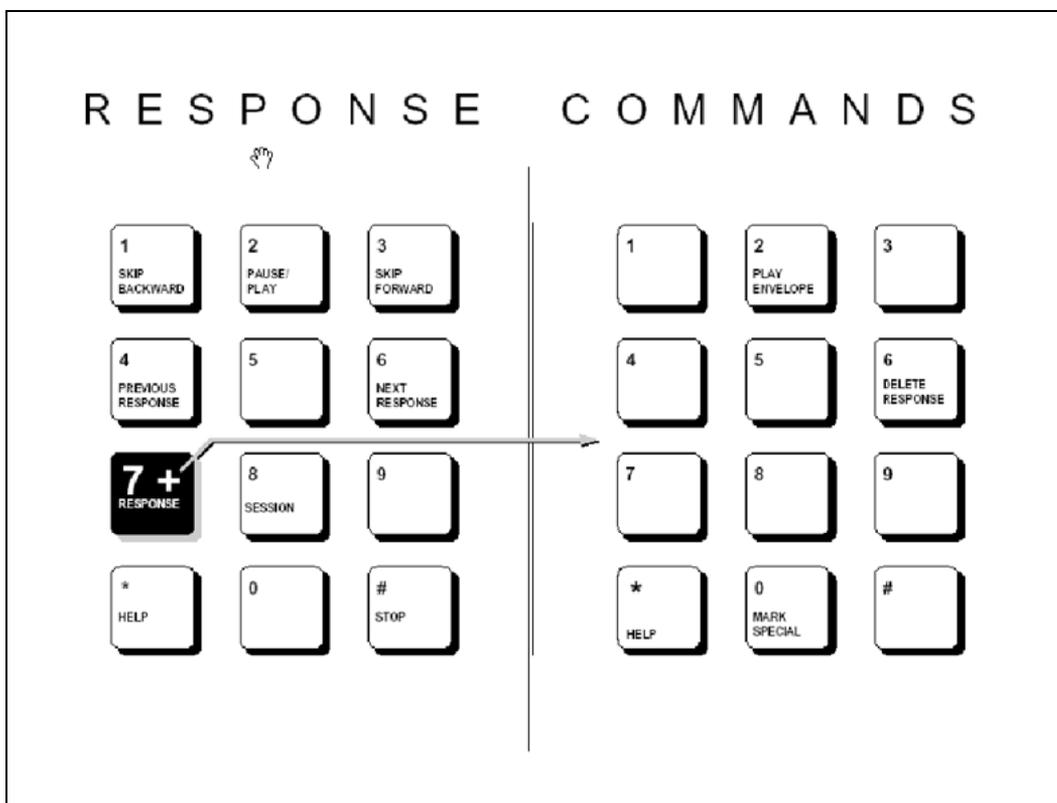
Table 1
Play and pause keypad commands

Command	Key	When to use	Result
SKIP BACKWARD	1	PLAY mode	System skips back within an answer.
PAUSE	2	PLAY mode	System stops playback and puts service in PAUSE mode.
SKIP FORWARD	3	PLAY mode	System skips forward within an answer.
PREVIOUS RESPONSE	4	PLAY or PAUSE mode	System skips to the previous response.
NEXT RESPONSE	6	PLAY or PAUSE mode	System skips to the next response.
HELP	*	Anytime	System plays prompts to help guide you through the transcription process.

Command	Key	When to use	Result
PAUSE	#	PLAY mode	System stops playback and puts service in PAUSE mode.
PREVIOUS FIELD	1	PAUSE mode	System skips to the previous field.
PLAY	2	PAUSE mode	System begins playback.
NEXT FIELD	3	PAUSE mode	System skips to the next field.
STOP	#	PLAY or PAUSE mode	System stops playback and plays a period of silence or pause.
PLEASE PRESS POUND	#	When system prompts you	Indicates to system that you have completed entering the information requested.
CANCEL	#	Anytime	Cancels a function that is in progress.

Response commands keypad layout

Figure 2
Response commands keypad layout



Response commands

Response commands are double-digit commands. All response commands begin by pressing 7 on your telephone keypad. Using response commands, you can play the response envelope, delete or restore a response, and

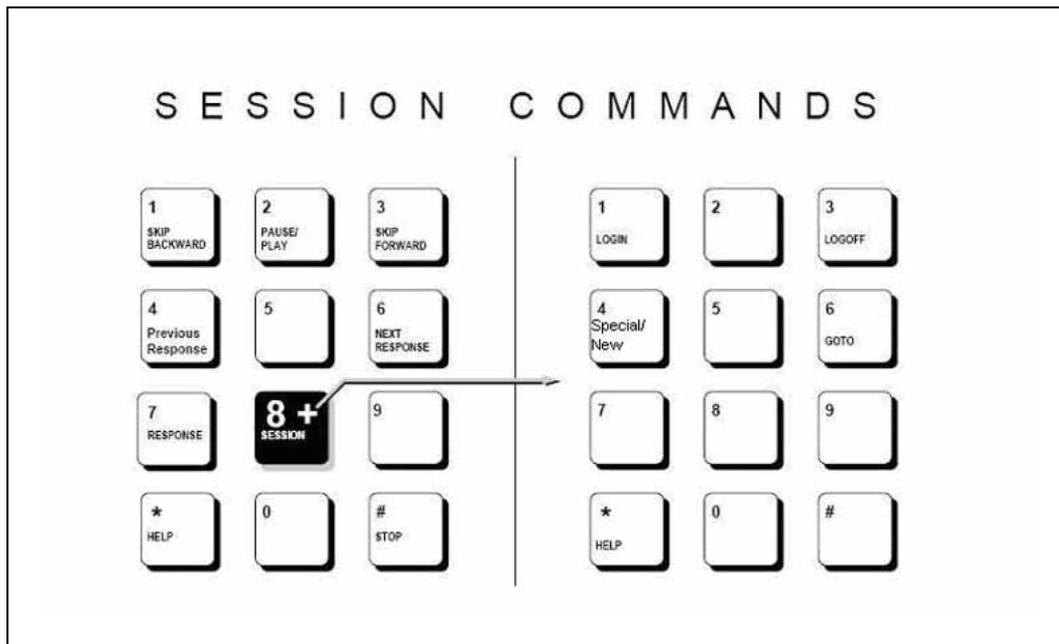
mark a response as special or new. The following table shows the response commands that are available on your keypad when the system is in play or pause mode. You can use these commands at different times when you transcribe responses.

Table 2
Response keypad commands

Command	Keys	When to use	Result
PLAY ENVELOPE	7 + 2	PLAY or PAUSE mode	System plays the response envelope.
DELETE RESPONSE	7 + 6	PLAY or PAUSE mode	System deletes the response.
MARK SPECIAL	7 + 0	PLAY or PAUSE mode	System marks the response special.
CANCEL	7 + #	Anytime	System cancels a function that is in progress.

Session commands keypad layout

Figure 3
Session commands keypad layout



Session commands

Like response commands, session commands are double-digit commands. All session commands begin with 8 on your telephone keypad. Using session commands, you can go to a particular response, switch response queues, log off the transcription service, or log on to another voice form from the current voice form without logging off the service. The following

table shows the session commands that are available on your keypad when the system is in play or pause mode. You can use these commands at different times when you transcribe responses.

Table 3
Session keyboard commands

Command	Keys	When to use	Result
LOGIN	8 + 1	Anytime	System logs on to another voice form.
LOGOFF	8 + 3	Anytime	System logs off the voice form.
SPECIAL/NEW	8 + 4	Anytime	System toggles back and forth from special to new response lists.
GOTO	8 + 6	Anytime	System goes to a specific response.
CANCEL	8 + #	PLAY or PAUSE mode	System cancels a function that is in progress.

Logging on to the transcription service using the telephone

When you receive notification that you have responses to transcribe, you can log on to the transcription service and play the responses.

To log on using your telephone

Step	Action
1	Dial the transcription service access number provided by your administrator. Result: The system asks you for the voice form ID.
2	Enter the voice form ID, followed by the pound (#) key. Result: The system asks you for the voice form password.
3	Enter your password corresponding to the voice form, followed by the pound (#) key. Note: If the system does not prompt you for a password, the system automatically logs you on to the transcription service. If you do not know the voice form password, ask your administrator. Result 1: The system plays the response header and announces the number of new responses followed by the number of special responses.

Result 2: Depending on how the administrator configures the service, the system plays the response envelope, which states the type of response, the voice form ID, and the time of day that the response is recorded. At this point, you are logged on to the transcription service and ready to transcribe responses.

Result 3: The system plays the first answer in the response.

Note: After the first answer field plays to the end, depending on how your administrator configures the system, the system responds in one of the following ways to give you time to transcribe the answer:

- the system stops playback
- the system stops playback for a specified period of time set by your administrator and then resumes playing the next answer, advancing automatically through all answers of the response until the system reaches the end of the response.

—End—

Playing responses

Overview

You can play a response as many times as you like. You can pause, stop, or resume playback at any time. You can navigate from one answer to the next answer or to the previous answer. You can navigate to the next response and back to the previous response. You can also skip forward or backward within an answer.

ATTENTION

After you transcribe all answers in a response, you must delete the response. If you do not delete the response, the response stays in the list of responses and another transcriber can retrieve and transcribe this response.

Resuming playback

If the system stops playback, the system is in pause mode.

To resume playback (when you are in the middle of an answer)

Step	Action
------	--------

1	Press 2 to play.
---	-------------------------

Result: The system resumes playing the response from the place you were prior to pausing or stopping the system.

—End—

Pausing playback

If the system stops playback and then automatically resumes playing the next answer before you finish transcribing the answer, you can stop or pause playback. You can use the pause command at any time while the system plays a response. Pause the system when you need to catch up. If an answer is especially long, you can pause as many times as you need to transcribe the response.

To pause playback

Step	Action
------	--------

1	Press 2 to pause.
---	-------------------

Note: When the system is in play mode, you can also use the pound (#) key to stop playback.

—End—

Skipping forward and backward within an answer

When you play an answer, you can skip forward or backward within the answer.

To skip forward within an answer

Step	Action
------	--------

1	Press 3 to skip forward.
---	--------------------------

Result: The system skips forward by 3 seconds and continues playing the answer from this point.

Note: If you skip forward within 3 seconds of the end of the answer, the system skips to the beginning of the next answer.

—End—

To skip backward within an answer

Step	Action
------	--------

1	Press 1 to skip backward.
---	---------------------------

Result: The system skips backward by 3 seconds and continues playing the answer from this point.

Note: To skip backward more than 3 seconds, press 1 again. You can press 1 as many times as you like. If you skip backward to the beginning of an answer, depending on how your administrator configures the system, the system plays a short tone or the name of the answer field.

—End—

Moving to the next or previous field

The system must be in pause mode to navigate to the next or previous answer field using the **NEXT FIELD** and **PREVIOUS FIELD** keys. If the system is in play mode, press 2, the pause key, or the pound (#) key to navigate to pause mode.

To move to the next field

Step	Action
------	--------

1	Press 3.
---	----------

Result: The system skips to the beginning of the next field.

Note: If you press the NEXT FIELD command when you play the last answer of a response, the system announces “*End of response.*”

—End—

To move to the previous field

Step	Action
------	--------

1	Press 1.
---	----------

Result:The system skips to the beginning of the previous field.

—End—

When you reach the end of a response

ATTENTION

When you successfully transcribe all answers in a response, you must delete the response. If you do not delete the response, the response stays in the list of responses and another transcriber can retrieve and transcribe the same response.

When you play the last answer of a response, you are at the end of a response. When you reach the end of a response, you can play the response again, navigate to the next or previous response, delete the response, or mark the response as special.

Playing the next or previous response

You can navigate through the responses to retrieve the next response or the previous response. You can press the NEXT RESPONSE and PREVIOUS RESPONSE commands at any time, either during playback of a response or when you stop or pause playback. When the system retrieves the next or previous response, the system plays either the response envelope or the response header.

To play the next response

Step	Action
------	--------

1	Press 6.
---	----------

Result: The system skips to the beginning of the next response.

Note: If no more responses are available when you play the next response, the system announces *"End of response list."*

—End—

To play the previous response

Step	Action
------	--------

1	Press 4.
---	----------

Result: The system skips to the beginning of the previous response.

Note: If you play the previous response while you play the first response, the system issues an error tone "*<Error tone> There is no previous response.*"

—End—

Deleting a response

When you delete a response, the system marks the response for deletion but does not permanently delete the response from the response list.

ATTENTION

When you finish transcribing a response, you must delete the response. If you do not delete the response, other transcribers can transcribe the response.

To delete a response

Step	Action
------	--------

1 Press **7 + 6**.

Result: When you delete a response, the system announces "*Response deleted.*" The system goes to the next oldest available response.



CAUTION

The system stores two responses at a time during a transcription session. If you delete a response, the system marks the response for deletion until you finish transcribing the next response. However, when you begin transcribing the third response (the second response after the response that you deleted), the system permanently deletes the response that is marked for deletion. You can restore a response that the system marks for deletion. You cannot restore a response that the system permanently deletes.

—End—

Restoring a deleted response

You can restore a response marked for deletion in two ways:

- press **7 + 6** (DELETE RESPONSE)
- press **7 + 0** (MARK SPECIAL)

To restore a deleted response using **7+ 6** or **DELETE RESPONSE**

Step	Action
------	--------

1 Press **7 + 6**.

Result: The system announces "*Response restored.*"

Note 1: To restore a response using 7 + 6, you use the same command as you use to delete a response. The DELETE RESPONSE command toggles between delete and restore.

Note 2: When you restore a response, the system returns the response to the list of stored responses to be transcribed and plays the next available response.

—End—

To restore a deleted response using 7 + 0 or MARK SPECIAL

Step	Action
------	--------

1	Press 7 + 0.
---	--------------

Result: The system announces "Response <ID> saved as special" or "Response <ID> saved as new," depending on which list you are transcribing.

Note 1: When you restore a response, the system returns the response to the list of stored responses to be transcribed and plays the next available response.

Note 2: The MARK SPECIAL command toggles between restore as new, or restore as special, depending on which list you are transcribing. When you transcribe special responses and you press 7 + 0, or MARK SPECIAL, the system restores the response as a new response. When you transcribe new responses and you press 7 + 0, or MARK SPECIAL, the system restores the response as a special response.

—End—

Marking a response as special

If you have problems transcribing a response, or if a response requires further attention by another person such as the administrator, you can mark the response as special.

To mark a response as special

Step	Action
------	--------

1	Press 7 + 0.
---	--------------

Result: The system announces “Response <response ID> marked as special” and retrieves the next available response.

Note: If you need to retrieve the response later, you can write the response ID down.

You can also use the MARK SPECIAL command to return a special response back to new.

—End—

Switching between new and special response lists

When you log on to a voice form, you can retrieve responses from the list of new responses in this voice form. If you transcribe special responses, you must specifically request to access the special response list using the SPECIAL/NEW command.

To go to the special response list

Step	Action
------	--------

1	Press 8 + 4.
---	--------------

Result: The system announces the number of special responses and retrieves the oldest available special response.

Note: You can use the SPECIAL/NEW command to toggle between the two response lists. For example, if you are transcribing responses in the special response list and you want to go to the new response list, use the SPECIAL/NEW command to return to the new response list.

—End—

Going to a specific response

You can use the GOTO command to go to special or new responses. You can also use the GOTO command to go to a specific response. Before you use the GOTO command to go to a specific response, note the response number that you are transcribing so that you can return to this response.

To go to a specific response

Step	Action
------	--------

1	Press 8 + 6.
---	--------------

Result: The system announces “Go to:”

- 2 Enter the response ID followed by the pound (#) key.

Result: The system goes to the response with the response ID that you specify.

—End—

Reaching the end of the response list

When you finish transcribing the last response, the system plays the following prompt: *“End-of-response list.”* To ensure that no new responses have been added to the response list while you are logged on, go to the next response after you hear the end-of-response-list prompt.

Checking for new responses

Step	Action
------	--------

- | | |
|---|------------------|
| 1 | Press 6 . |
|---|------------------|

Result: If there are no new responses, the system plays the following prompt: *“End-of-response list.”* If there are new responses, the system goes to the next response.

If you reach the end of the response list, you can log off the transcription service.

—End—

Logging on to another voice form

If you finish transcribing responses for one voice form and want to transcribe another voice form, use the LOGIN command. When you use the LOGIN command, you do not have to log off the transcription service and then log on again to retrieve another form.

To log on to another form

Step	Action
------	--------

- | | |
|---|----------------------|
| 1 | Press 8 + 1 . |
|---|----------------------|

Result: The system exits the current form and prompts you for a new form ID and password, depending on how your administrator configured the system.

—End—

Playing the response envelope

You can play the envelope for a response you transcribe at any time by pressing the PLAY ENVELOPE command.

To play the response envelope

Step	Action
------	--------

1	Press 7+ 2 .
---	---------------------

Result: The system plays the response envelope in the following format:

<Status> <Form spoken name> Response <response ID> Received
<time stamp>

Note: If you do not enter a command within 3.5 seconds, you hear the prompt *“For help, press star.”* When the system plays the response envelope, the system does not automatically resume playback. To resume playback, use the PLAY command. Playback begins at the point at which the PLAY ENVELOPE command was given.

—End—

Logging off

When you finish transcribing all responses, you can log off the transcription service.

To log off

Step	Action
------	--------

1	Press 8 + 3 .
---	----------------------

Result:: The system terminates the session, disconnects your call, and plays the following prompt: *“Goodbye.”*

—End—

Using My CallPilot to transcribe

Overview

If you are a CallPilot user with transcription privileges, you can use My CallPilot to retrieve and transcribe caller responses. For more information about using My CallPilot to transcribe, ask your administrator.

Logging on using My CallPilot

Your administrator provides you with the URL to launch My CallPilot. Bookmark this address in your Web browser for easy access.

To log on to My CallPilot

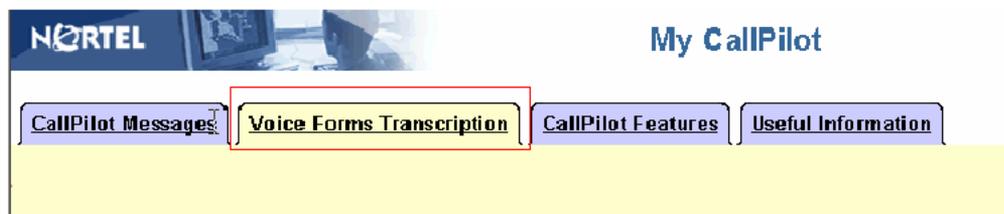
Step	Action
1	In your Web browser, navigate to the My CallPilot address.
2	On the Welcome page, in the Mailbox box, type your mailbox number.
3	In the Password box, type your CallPilot password.
4	Click Login .

—End—

Retrieving responses

After you log on to My CallPilot, the following Web page appears.

Figure 4
My CallPilot home page



To retrieve responses

Step	Action
1	Click the Voice Forms Transcription tab. This tab does not appear for users without transcription permission.

Result: The following Web page appears that lists the voice form IDs and voice form titles. These IDs and titles are links to the various voice forms.

Figure 5
Voice Forms list



2	Select an item listed under Voice Form ID or Voice Form Title .
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Result: A Web page appears that prompts you for the voice form password, if the voice form is password protected. Otherwise, proceed to Step 4.

3	Type your password.
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Result: A Web page appears showing the list of responses.

Figure 6
New responses

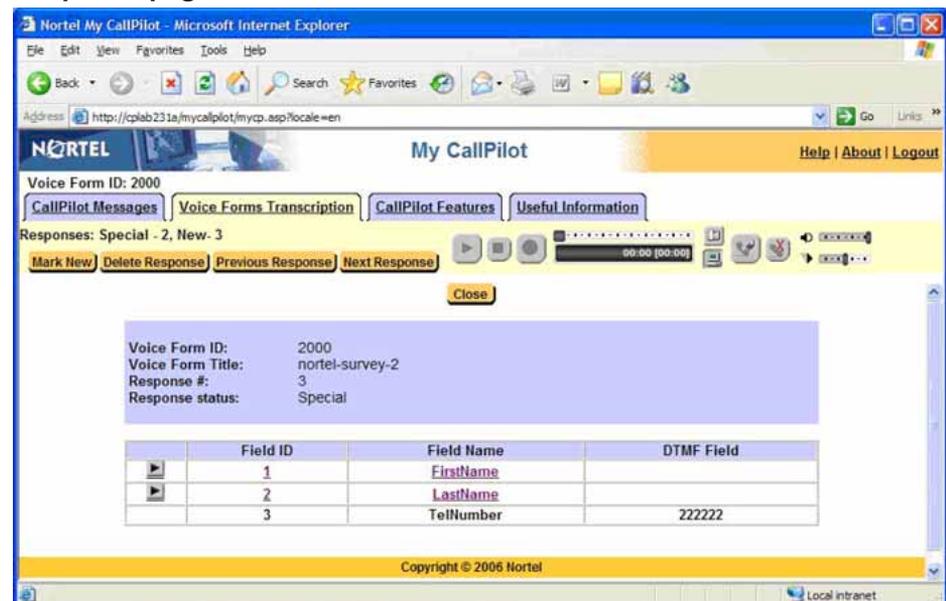


Note: The type of list that appears depends on the list that you selected in your last session. For example, if you asked the system to display all responses, the All Responses list appears. You can toggle between the three types of lists by clicking on the buttons at the top of the page.

- 4 Select a response that you want to transcribe.

Result: A Web page appears that contains a list of all answers in the voice form.

Figure 7
Response page -- list of fields



Note 1: There are two types of fields: voice answer field, which is the caller's spoken answer in audio format, and keypad input field, which is the caller's answer entered through the keypad. The voice answer fields have a play button icon in the left column to play back the fields. The DTMF Field column in Figure 7 shows the contents of the keypad input fields.

Note 2: When you select a response, the system locks the response so that another transcriber cannot retrieve this response.

—End—

Playing responses

Overview

After you retrieve a response, you can play the voice answer fields of the response using the CallPilot player, or any player that supports WAV format. You can view the keypad input fields in the DTMF column of the response page.

You can navigate to the next or previous response, delete a response, and mark a response as special.

Playing an answer in a response

To play an answer in a response

Step	Action
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1	Click the play button icon in the column that corresponds to the field that you want to transcribe, or click the field name under the column Field Name .
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Result: The system plays the answer through to the end and then stops.

2	To skip backward within the answer, press the rewind button on your player.
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3	To skip forward within an answer, press the fast forward button on your player.
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4	To stop playback, press the stop button on your player.
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5	To navigate to the next response, click the Next Response button.
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- 6 To navigate to the previous response, click the **Previous Response** button.
- 7 Play and transcribe all answers in the response.
- 8 When you finish transcribing all answers in the response, delete the response.

ATTENTION

When you finish transcribing a response, you must delete the response so that another transcriber cannot retrieve this response.

—End—

Deleting a response

To delete a response

Step	Action
------	--------

- | | |
|---|---|
| 1 | Select the response that you want to delete. |
| 2 | Click the Delete Response button.

Result: A message appears asking you to confirm the deletion. The system permanently deletes the response if you confirm the deletion. |
| 3 | Click the OK button to return to the list of responses. |

ATTENTION

When you finish transcribing a response, you must delete the response so that another transcriber cannot retrieve this response.

—End—

Marking a response as special

If you have problems transcribing a response, or if a response requires further attention by another person such as the administrator, you can mark the response as special.

To mark a response as special

Step	Action
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- | | |
|---|---------------------------------------|
| 1 | Click the Mark Special button. |
|---|---------------------------------------|

Result: The status of the response changes to special, and the system goes to the next response.

- 2 Click **Close** to return to the list of responses.

—End—

Nortel CallPilot

Voice Forms Transcriber User Guide

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Publication: NN44200-110
Document status: Standard
Document version: 01.04
Document date: 27 April 2007

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