

555-7101-300

CallPilot

Administrator's Guide

Product release 1.07

Standard 1.0

April 2000



How the world shares ideas.

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CallPilot

Administrator's Guide

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Chapter 1

CallPilot configuration overview

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What's new in this guide?

This version of the *CallPilot Administrator's Guide* is a compilation of three previous volumes (Basic and Advanced 1 and 2). This guide provides an end-to-end view of how to set up and configure a CallPilot system. To support tasks such as system backups and system monitoring, please see *Monitoring and Security for the Administrator*.

The following points outline changes in CallPilot 1.07:

- **Removal of references to MAT**

Although the CallPilot Administration Client and Meridian Application Tools (MAT) can coreside on the same PC, their functionality is no longer integrated.

- **Third-party switch connectivity**

For information on third-party switch connectivity, see [“Skills you need” on page 18](#), [“Related information products” on page 19](#), and [Chapter 22, “Managing channels \(M1 switch only\).”](#)

- **Organization of systems into sites (optional)**

Administrators might now need to open a site folder to see a CallPilot system icon. See [“Connecting to a CallPilot server” on page 34](#).

- **New access class levels**

The Create/Delete and Edit access levels can now be restricted to mailbox user information only. See [“Access levels” on page 81](#).

- **Automatic distribution of users across volumes**

When this feature is enabled, new user mailboxes are automatically distributed in proportion to the size of the MMFS volumes created for the CallPilot server. See [Chapter 9, “Adding a mailbox user group.”](#)

- **AutoAdd enhancements**

Administrators can view or print the AutoAdd error log and include additional CallPilot fields in the AutoAdd data file. See [Chapter 9, “Adding a mailbox user group.”](#)

- **Search Users enhancements**

Administrators can search for users based on system greeting or message-blocking capabilities. See [Chapter 12, “Searching for users.”](#)

About configuring and administering CallPilot

Introduction

Once your switch is installed and provisioned and your CallPilot server is installed and configured, set up a very basic CallPilot system. After that has run smoothly over a period of routine maintenance, extend the system functionality to meet the requirements of your organization and users.

What is CallPilot?

CallPilot is a powerful multimedia messaging system that offers a single solution for managing many types of information, including

- voice, fax, and e-mail messages
- telephone calls (including conferencing)
- calendars
- directories
- call logs

CallPilot users can send and receive both voice and fax messages through display-based phonesets, wireless sets, Windows desktop computers, or a speech recognition interface.

What is the CallPilot Administration Client?

Use the CallPilot Administration Client to connect to a CallPilot server. Once you have connected to the server, you can create and maintain the information the server uses to provide CallPilot messaging services to authorized users.

This information includes

- user groups and permissions
- system settings
- messaging service settings

Delegation of administrative tasks

The CallPilot Administration Client encompasses diverse functionality. The administrators who use it can be distributors, support technicians, or regular day-to-day administrators of customer systems.

When you use the CallPilot Administration Client, you can delegate administrative tasks among different administrators. For example, you set up your CallPilot system so that a user group administrator controls user access to CallPilot messaging services while a network administrator controls system configuration and backups.

See also

- [“Connecting to a CallPilot server” on page 34](#)

Remote administration

For most systems, delegating administrative tasks necessitates remote administration of the server. This guide includes instructions for using the Symantec Corporation product pcANYWHERE32 for setting up remote administration at an administrator's site.

One licensed copy of pcANYWHERE32 Version 8.0 is provided for the server on the CallPilot server software CD. pcANYWHERE is installed on the server at the factory.

To install pcANYWHERE Version 8.0 on the administrative PC, you must purchase a separate license for the administrative PC.

See also

- [Chapter 23, “Configuring remote administration of the server”](#)

About this guide

Introduction

The *Administrator's Guide* provides the information you need to

- set up user and messaging administration of a CallPilot system
- perform frequent or routine administrative tasks
- extend the functionality of a CallPilot system

See also

- system monitoring and troubleshooting information in *Monitoring and Security for the Administrator*
- [“Related information products” on page 19](#)

Assumptions

This guide assumes that

- the CallPilot server has been correctly installed and is operational
- the switch has been installed and provisioned to support your CallPilot system

If the CallPilot server has not been installed, then install it before proceeding. For installation instructions, refer to the software installation and configuration guide appropriate to your server type.

If the CallPilot server has been installed but is not operational, refer to *Monitoring and Security for the Administrator* for information on troubleshooting your system.

Skills you need

Switch technology knowledge

Knowledge of, or experience with, one or more of the following products is recommended:

- Meridian 1 (M1) PBX equipment, X11 release 23c and greater
- MSL-100 equipment
- Lucent equipment
- Mitel equipment
- Rolm equipment
- Matra equipment

PC experience or knowledge

Knowledge of, or experience with, the following PC products is assumed. For more information on these products, please refer to the documentation provided by the manufacturer:

- Microsoft Windows NT, 95, or 98

Other experience or knowledge

Other types of experience or knowledge that can be of use include

- network management
- client/server systems

Related information products

Introduction

The following list of CallPilot 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 Titles

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 Titles

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 Titles

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 Titles

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 Titles

Multimedia Messaging User Guide

Speech Activated Messaging User Guide

Desktop Messaging Quick Reference Guide

Trouble-shooting 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

For help with troubleshooting your system, contact your distributor’s technical support organization.

Contacting Nortel Networks

If you have comments or suggestions for improving CallPilot and its documentation, Nortel Networks would like to hear from you. Please contact us at the following address:

http://www.nortelnetworks.com/callpilot_feedback

Chapter 2

CallPilot configuration task flows

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Overview

Introduction

This chapter summarizes the tasks required to configure and administer a CallPilot system.

This chapter is organized into two levels of CallPilot configuration tasks:

- **High-level task flow** describes the functional areas that must be set up before you can provide a CallPilot system to an organization.
- **Detailed task lists** provide a more detailed description of each task.
Note: These tasks lists are numbered only where the order of the tasks can be identified.

Starting point

The following tasks must have been completed successfully:

- messaging network configuration
- switch installation and provisioning
- server installation and configuration
- CallPilot Administration Client installation

High-level task flow

Task	Detailed task list
1 Set up a basic CallPilot system and verify that it is running smoothly.	“Detailed task flow: Initial system setup” on page 25
2 Perform ongoing maintenance tasks.	“Frequently performed tasks” on page 26
3 Extend system functionality as needed.	“Detailed task flow: Extending system functionality” on page 28

Detailed task flow: Initial system setup

Introduction

The first set of tasks is to set up a basic voice messaging system and ensure that it is running smoothly. These tasks must be performed before the system can run effectively.

Administrative role

Typically, these tasks are performed by the distributor.

Basic CallPilot configuration task flow

Task	See
1 Configure the Voice Messaging SDN.	Chapter 4, “Making the basic service available”
2 Configure dialing information, message delivery thresholds, holidays, and specialized DN, and customize system prompts.	Chapter 5, “Configuring basic messaging options”
3 Configure system-wide logon requirements and apply the global restriction/permission list (RPL).	Chapter 6, “Configuring mailbox security”
4 Customize the global RPL. Note: By default, no off-switch dialing is permitted.	Chapter 7, “Customizing dialing restrictions and permissions”
5 Configure access classes for administrators and managers.	Chapter 8, “Controlling access to administration programs”
6 Add mailbox users.	Chapter 9, “Adding a mailbox user group”
7 Customize mailbox classes.	Chapter 10, “Configuring mailbox capabilities for a user group”

Frequently performed tasks

Introduction

Once the basic system is running smoothly, there are routine maintenance tasks to perform whenever users

- cannot access their mailboxes
- join or leave the organization
- change job function

Administrative role

Typically, these tasks are performed by one or more on-site customer administrators.

See also

- information about installing and configuring Desktop Messaging on the user's PC in the *Desktop Messaging Installation and Configuration Guide*

Frequently performed administrative tasks

Task	See
Search for a user or user group.	Chapter 12, “Searching for users”
Reenable a disabled mailbox.	“Reenabling a disabled mailbox” on page 143
Reset a user's password.	“Resetting a user's mailbox password” on page 144
Enable or disable a user's mailbox autologon.	“Enabling or disabling Autologon to a mailbox” on page 146

Task	See
Disable or restore a user's administrative privileges.	“Disabling and restoring a user's access to administrative programs” on page 148
Adjust mailbox capabilities for a user group.	“Resetting a user's mailbox password” on page 144
Move a user to a different user group.	“Resetting a user's mailbox password” on page 144
Add or delete a user.	Chapter 15, “Adding and deleting users and directory entries”
Adjust mailbox capabilities for an individual user.	“Customizing a mailbox for a typical user” on page 165 or “Customizing a mailbox for a specific scenario” on page 175
Customize system prompts.	“Viewing and changing system prompts” on page 58
Create and maintain shared distribution lists.	Chapter 11, “Creating and maintaining shared distribution lists”

Detailed task flow: Extending system functionality

Introduction

Once your basic system is running smoothly, you can extend its functionality.

Enhancement stages

Enhancements are performed all at once or in stages. If you perform the tasks in stages, it might be necessary to repeat tasks for each stage of enhancement.

For example, you can add fax options as an enhancement. Later, when users acquire more advanced equipment, you can enable speech recognition features for the user groups that require them. Then, if the customer upgrades the system to include Enterprise or AMIS networking, you can enable Networking for certain user groups and configure some feature SDNs for sharing.

As a system develops, set up remote administration PCs for various administrators and, if the CallPilot server is connected to an M1 switch, manage channel allocations to optimize system performance.

Administrative role

Typically, these tasks are planned and performed by the distributor.

Impact on user environment

The process of adding some optional Multimedia Messaging features involves upgrading end user equipment, and might involve upgrading the CallPilot system.

See also

- information about hardware requirements and associated software in the *Desktop Messaging Installation and Configuration Guide*

Tasks for extending system functionality

Task	See
1 Make additional services available to users.	Chapter 17, “Making optional services available”
2 Configure session profiles for Application Builder applications (voice menus).	Chapter 17, “Making optional services available”
3 Configure additional messaging options.	Chapter 18, “Configuring mailboxes for optional services”
4 If a second language has been added, make system prompts bilingual.	“Making system greetings bilingual” on page 242
5 Configure outcalling services.	Chapter 19, “Configuring outcalling services”
6 Create any new RPLs that are required and apply them to the new features.	Chapter 20, “Configuring RPLs for optional messaging features”
7 If the system is complex enough to require a hierarchy of user groups, create and organize new user creation templates.	Chapter 21, “Adding user creation templates”

Additional tasks for system functionality

Task	See
<i>M1 switch only</i> : Reallocate channels to different media.	Chapter 22, “Managing channels (M1 switch only)”
Configure the remote administrative PC.	Chapter 23, “Configuring remote administration of the server”

Part 1

Setting up a basic system

In this part

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Chapter 3

Getting started

In this chapter

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Connecting to a CallPilot server

Introduction

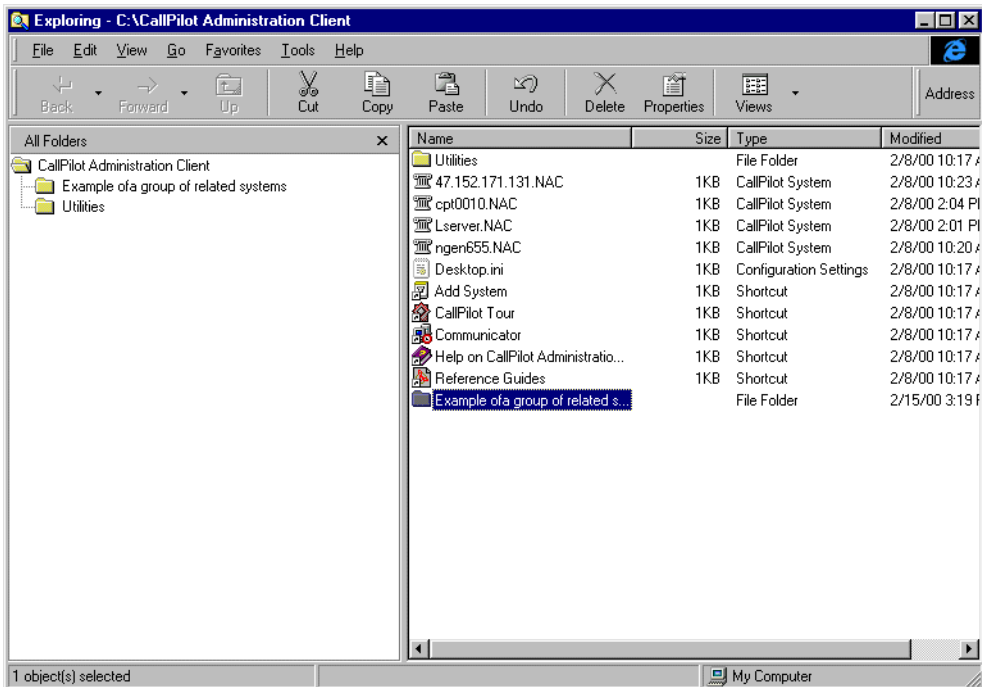
You must connect to your CallPilot system server before you can

- perform administrative tasks
- build or work with CallPilot applications

Selecting a system—the CallPilot Administration Client Explorer window

After you open the CallPilot Administration Client, select your CallPilot system, either directly from the CallPilot Administration Client Explorer window or from a folder that has been created to group all related systems together.

Getting there Start > Programs > Nortel Networks CallPilot Administration Client

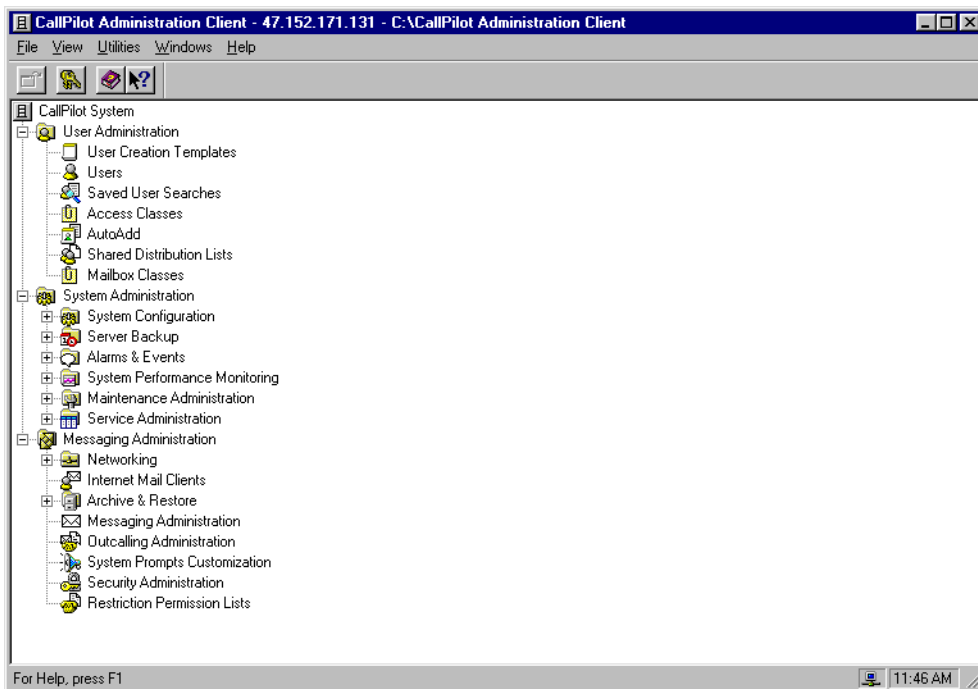


Selecting an administrative program—the CallPilot Administration Client

When you select a system from the CallPilot Administration Client Explorer, you are prompted for a user ID and password. Once CallPilot validates the compatibility between the server and client software, as well as the user ID and password, the CallPilot Administration Client window for the selected system appears.

If the server software has been installed, upgraded, or reinstalled since the last time you connected to the system using the sysadmin account, change the default password (see [“Changing the sysadmin account password” on page 36](#)).

Note: The following illustration shows the window with the program list expanded.



The CallPilot Administration Client gives you access to your system and administrative programs, using a navigation tree to display the system's hierarchy.

Changing the sysadmin account password

Introduction

The password for the default system administrator account is automatically set to *nortel* whenever CallPilot server software is installed, upgraded, or reinstalled. Afterward, when you first use the default system administrator account (sysadmin) to connect to the CallPilot system, you must use *nortel* as the password. CallPilot immediately prompts you to change the password. If you do not specify a new password, you cannot connect to the system.

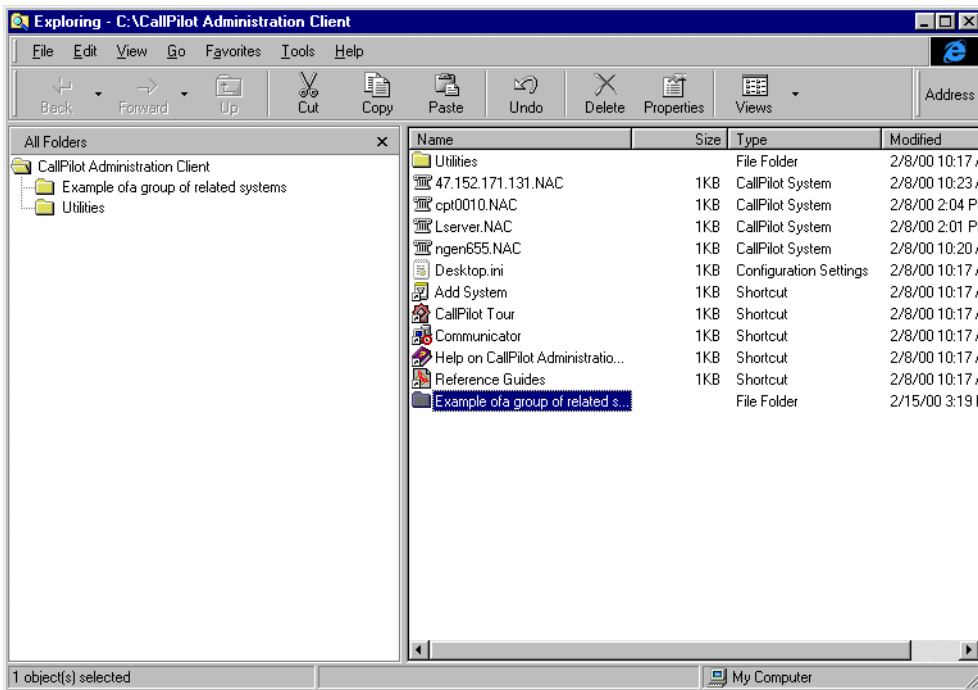
Also use this procedure when your password expires and you have to change it.

The only other way to change the sysadmin account password is to reset it to the default *nortel*.

See also

- [“Connecting to a CallPilot server” on page 34](#)
- [“Resetting a user’s administrative password” on page 150](#)

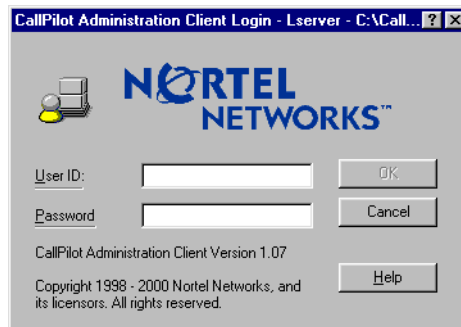
Getting there Start > Programs > Nortel Networks CallPilot Administration Client



To open a system with new or upgraded software

- 1 Double-click the system name.

Result: The CallPilot Administration Client system logon window appears.



- 2 In User ID, type **sysadmin**.
- 3 In Password, type **nortel**.

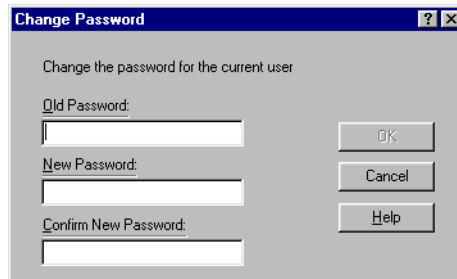
- 4 Click OK.

Result: The CallPilot Administration Client prompts you to change your password.



- 5 Click Change Password.

Result: The Change Password dialog box appears.



- 6 In the Old Password box, type the new password.
- 7 In the New Password box, type the new password.
- 8 In the Confirm New Password box, type the new password again.
- 9 Click OK.

Result: The CallPilot Administration Client system window appears.

Simultaneous access to administrative resources

Introduction

Multiple administrators can log on to CallPilot at the same time without overwriting one another's work.

If you try to access a resource (such as a specific mailbox class or user profile) that is currently being edited, you see a read-only view of the property sheet. You are not notified when the resource is released, but must try to access the property sheet again to see whether its status has changed.

If you are the first to log on to a particular resource and another administrator tries to access the same resource, a message informs you of the access attempt. You have the following options:

- Keep editing.
- Save your changes, and release the resource to the other administrator.
- Cancel your changes, and release the resource to the other administrator.

If you do not respond to this prompt within two minutes, the system releases the resource and all your unsaved changes are lost.

Refreshing screens

Because multiple administrators can access the same database at the same time, use the Refresh command (available from the View menu) to ensure the information you are seeing is the most up to date.

For example, if you are viewing a list of users when another administrator deletes a user, the only way to see the change is to refresh the screen. Therefore, refresh the screen regularly.

See also

- [Chapter 8, “Controlling access to administration programs”](#)

Chapter 4

Making the basic service available

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Service directory number overview

Introduction

To make a service or application available to callers, you must add a unique service directory number (SDN) to the SDN table and then publish the number to users of the service. Until you do this, the service or application exists in the system but callers cannot use it.

Outcalling Services, which require an outbound SDN before they can perform their functions, are automatically added to the SDN table during software installation.

SDN Table

An SDN is the number that callers dial to access a service. Each SDN must be unique so that when a caller dials a number, the system can identify which service is being requested.

SDNs are defined on the server and stored in the SDN Table. When a caller dials a number to access a service, the system looks up the number in the SDN Table and activates the appropriate service.

See also

- [Chapter 16, “Overview of optional services”](#)
- [Chapter 17, “Making optional services available”](#)

Assigning a Voice Messaging SDN

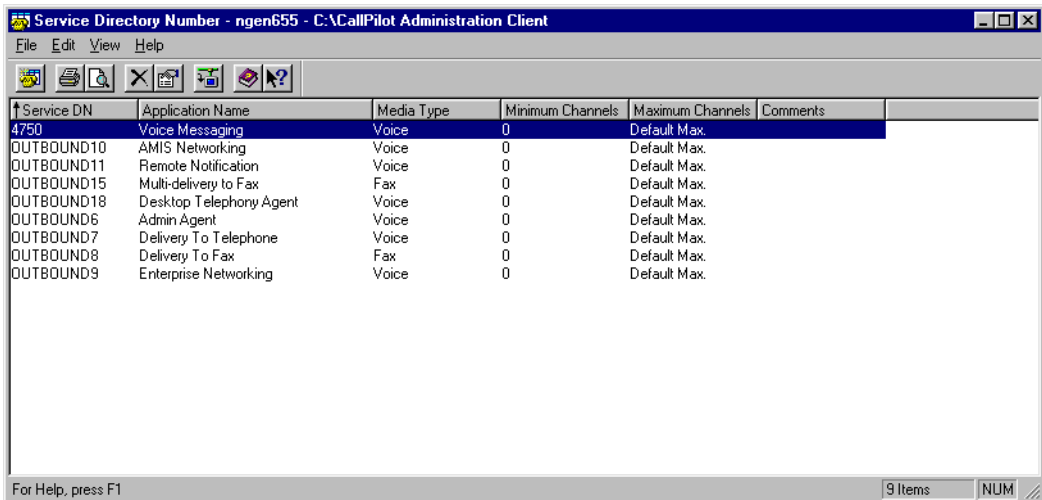
Introduction

For a basic system, you need only a Voice Messaging SDN.

Access requirements

To add SDNs, you must belong to an access class that grants Create/Delete access to Service Directory Number.

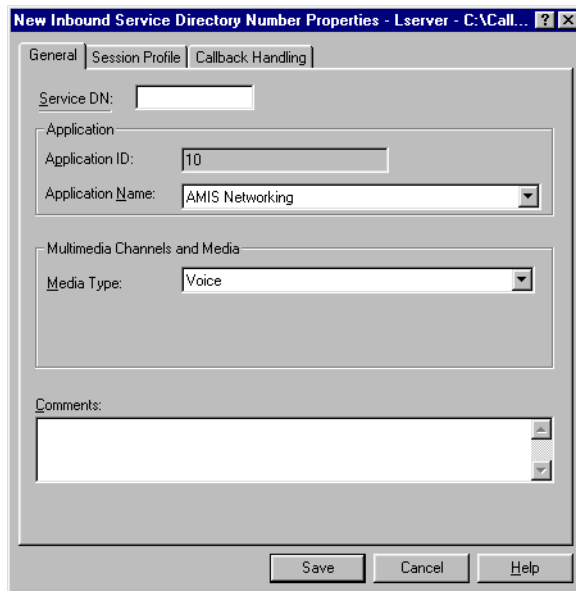
Getting there CallPilot System > System Administration > Service Administration > Service Directory Number



Service DN	Application Name	Media Type	Minimum Channels	Maximum Channels	Comments
4750	Voice Messaging	Voice	0	Default Max.	
OUTBOUND10	AMIS Networking	Voice	0	Default Max.	
OUTBOUND11	Remote Notification	Voice	0	Default Max.	
OUTBOUND15	Multi-delivery to Fax	Fax	0	Default Max.	
OUTBOUND18	Desktop Telephony Agent	Voice	0	Default Max.	
OUTBOUND6	Admin Agent	Voice	0	Default Max.	
OUTBOUND7	Delivery To Telephone	Voice	0	Default Max.	
OUTBOUND8	Delivery To Fax	Fax	0	Default Max.	
OUTBOUND9	Enterprise Networking	Voice	0	Default Max.	

To create the Voice Messaging SDN

- 1 On the File menu, click New.



The screenshot shows a dialog box titled "New Inbound Service Directory Number Properties - Lserver - C:\Call...". It has three tabs: "General", "Session Profile", and "Callback Handling". The "General" tab is active. It contains the following fields and controls:

- Service DN:** A text input field.
- Application:** A section containing:
 - Application ID:** A text input field with the value "10".
 - Application Name:** A dropdown menu with "AMIS Networking" selected.
- Multimedia Channels and Media:** A section containing:
 - Media Type:** A dropdown menu with "Voice" selected.
- Comments:** A large text area with a scroll bar.
- Buttons:** "Save", "Cancel", and "Help" buttons at the bottom right.

- 2 On the General tab, in the Service DN box, type the dialable number you want to assign to the application.
 - 3 In the Application Name list, select Voice Messaging.
 - 4 In the Media Type list, select Voice.
- Note:** If all boxes are disabled, no further configuration is necessary.
- 5 When you finish configuring the Service DN, click Save.

Chapter 5

Configuring basic messaging options

In this chapter

<u>Summary of messaging configuration options</u>	<u>46</u>
<u>Setting mailbox storage limits and system time-outs</u>	<u>47</u>
<u>Specifying dialing information</u>	<u>50</u>
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Summary of messaging configuration options

Introduction

The Messaging Administration program lets you define the system-wide settings for the messaging services you have set up. These settings govern how mailboxes receive, compose, and send both fax and voice messages. The remainder of this chapter explains those settings and the ways to configure them.

Use CallPilot Administration Client to configure the following settings:

- Mailbox storage limits and time-outs (see page [47](#))
- Dialing information (see page [50](#))
- Billing and attendant DNs (see page [54](#))
- Holiday schedule (see page [56](#))

Setting mailbox storage limits and system time-outs

Introduction

To keep data and traffic from exceeding system capacity, you must set Mailbox Full warning thresholds and time-outs. All these settings are found on the Messaging Administration General tab (see page [48](#)).

Mailbox storage limits and warnings

Mailbox storage limits apply to all CallPilot voice items, including prompts. When you specify the number of minutes and seconds allowed for user mailboxes, also specify the percentage at which CallPilot generates a warning to the user to delete voice items.

Time-outs

Time-out values determine the amount of time that the system waits for a caller to respond to a prompt before taking action (prompting again or disconnecting).

Command Entry time-out

The Command Entry time-out is used when the system is waiting for a response from the caller. Set time parameters that, when exceeded, prompt the system for a response.

Short Disconnect time-out

The Short Disconnect time-out ends a call when the Command Entry time-out has been exceeded. Callers usually have several opportunities to respond before the short disconnect time-out is used. This time-out value is used when a caller disconnects from a thru-dial service or Application Builder menu.

Record Disconnect time-out

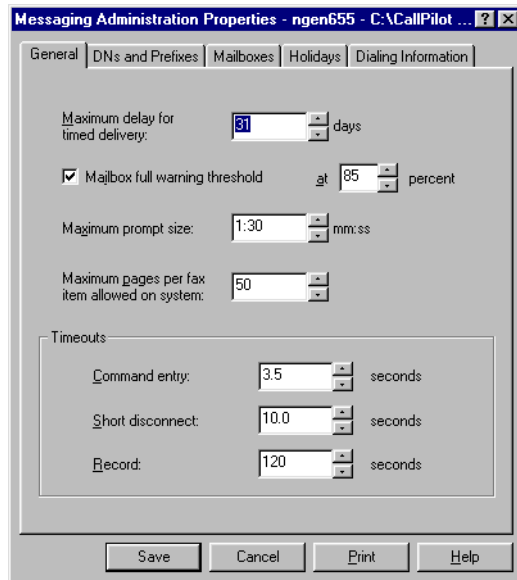
This time-out value is used when prompts are recorded for menus, announcements, and thru-dial services. The system disconnects the session when, during recording, the specified length of silence is recorded.

Access requirement

To specify mailbox storage limits or system time-outs, you must belong to an access class that grants Edit access to Messaging Administration.

Getting there

CallPilot System > Messaging Administration > Messaging Administration > General tab



To specify the Mailbox Full warning threshold

- 1 In the percent box, type the percentage of capacity that a mailbox reaches before the user hears the Mailbox Full warning prompt.
- 2 When you finish configuring the system messaging options, click Save.

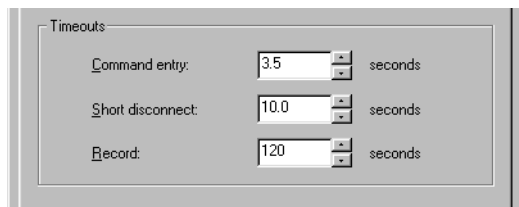
To specify the mailbox capacity

- 1 In the Maximum prompt size box, type the number of minutes and seconds allowed for *all* CallPilot voice items, including all system prompts, customized prompts, and prompts defined in Application Builder.
- 2 When you finish configuring the system messaging options, click Save.

To set message blocking options

- 1 If there is a check mark in the Block call answering when mailbox is full box, all messages except system messages are blocked until the user deletes messages from the mailbox.
- 2 When you finish configuring the system messaging options, click Save.

To specify system time-outs



The screenshot shows a window titled "Timeouts" with three settings, each with a text box and a "seconds" label:

Setting	Value	Unit
Command entry:	3.5	seconds
Short disconnect:	10.0	seconds
Record:	120	seconds

- 1 In the Command Entry box, type the number of seconds the system waits for an action from a caller.
- 2 In the Short Disconnect box, type the number of seconds the system waits for user input from a thru-dial service or voice menu before disconnecting.
- 3 In the Record box, type the number of seconds the system waits for a caller to record more until the system disconnects.
- 4 When you finish configuring the system messaging options, click Save.

Specifying dialing information

Introduction

CallPilot requires dialing information to translate a number into a dialable directory number (DN). Dialing information consists of two general types of information, required for the following purposes:

- to call the local switch and access the network
- to distinguish certain area or city codes that require a mixture of local calls and long distance calls, depending on the exchange of the destination dialed number

Note: Information entered during the installation process appears automatically.

Feature use of dialing information

CallPilot users do not directly use dialing information. Certain features use dialing translations to generate a DN to call back.

- The system uses default access codes to handle normal situations for local, national, international, and (if they exist) ESN calls.
- Exceptional situations, such as calls to other area or city codes that are still considered local calls, use area/city codes.

Switch type dependencies

Only the M1 switch can

- capture an external CLID with an unknown format
- translate unknown dialing numbers into a default DN

For all other switch types, the controls relating to CLID and the translation table are preset and disabled.

Dialing defaults

CallPilot uses these prefixes to generate a DN that is understandable to the switch. You must define four dialing defaults to call outside your local switch:

- **local prefix**—to dial out of the switch and access the public network or a private network to place a local call
Note: Enter a prefix depending on whether you use a private network or a public network to place local calls. Typical network access codes are 9 or 8 to access the public network.
- **long distance prefix**—to dial out of the switch and access the public network or a private network to place a long distance call
Note: Enter a prefix depending on whether you use a private network or a public network to place long distance calls. Typical long distance prefixes are 91 or 81 in North America, or 90 or 80 in Germany, to access the public network, or 6 to access a private ESN network
- **international prefix**—to dial out of the switch and access the public network or a private network to place an international call
Note: Enter a prefix depending on whether you use a private network or a public network to place international calls. Typical international access codes in North America are 9011 or 8011 to access the public network, or 6011 to access a private ESN network.
An international access code in England, for example, is 900.
- **ESN access code**—to dial out of the switch to place local, long distance, international, and ESN calls using either the public network, the ESN network, or a combination of both
Note: To access a private ESN network, you typically dial 6 plus the digits needed to make a national call to the same local site. For instance, the area/city code of Manhattan is 212, so the access code is 61212.

Access requirements

To specify dialing information, you must belong to an access class that grants Edit access to Messaging Administration.

Getting there

CallPilot System > Messaging Administration > Messaging Administration > Dialing Information tab

Messaging Administration Properties - ngen655 - C:\CallPilot ...

General | DN's and Prefixes | Mailboxes | Holidays | **Dialing Information**

Dialing Defaults

Local Prefix : 9

Long Distance Prefix :

International Prefix :

ESN Access Code :

Public Telephone Network Information

Local country code : 1

Local area/city code : 416

Unknown Format Handling

☒ Capture external CLID with unknown format

Default translation : Local

Save Cancel Print Help

To specify dialing information

- 1 In the Local Prefix box, type the prefix users must dial to make a local call.
- 2 In the Long Distance Prefix box, type the prefix users must dial to make a long distance call.
- 3 In the International Prefix box, type the prefix users must dial to make an international call.
- 4 In the ESN Access Code box, type the prefix users must dial to make a call on the private ESN network.
- 5 In the Local country code box, type the code that identifies the local area or city in which your switch is located.
- 6 In the Local area/city code box, type the code that identifies the country in which your switch is located.
- 7 To configure CallPilot to collect calling numbers from unknown dialing plans, make sure there is a check mark in the Capture external CLID with unknown format check box.

Note: For non-M1 switches, this check box is checked and disabled.

M1 connectivity: If you are confident that all unknown incoming calls are the same type, you can configure CallPilot to both collect and translate unknown numbers. If not, either make sure that there is no check mark in the Capture external CLID with unknown format check box, or click <None> in the Default translation list.

- 8 To define how your system translates unknown dialing numbers into one type of dialing number, select a default from the Default translation list.

Note: For non-M1 switches, this check box is set to None and disabled.

M1 connectivity: If you are not confident that all unknown incoming calls are the same type, but have decided to collect them, choose <None> from the Default translation list.

- 9 When you finish configuring the system messaging options, click Save.

Configuring special DNs

Introduction

Special DNs include

- the billing DN, which accepts billing charges if the initiator's mailbox number is lost (for example, if the call is dropped)
- the attendant DN, which specifies an extension to which the system transfers callers if they press 0 during a messaging session and the subscriber has not set up a revert DN
- the optional name dialing DN, which allows callers to dial a user by spelling his or her last name on the phoneset keypad

Name dialing restrictions

Disable name dialing

- to prevent external callers from identifying your system's users
- in any country where the keypads are not mapped to an alphabetical sequence that CallPilot recognizes.

Access requirements

To specify or modify special DNs, you must belong to an access class that grants Edit access to Messaging Administration.

See also

- information on generating chargeback reports in *CallPilot Reporter Guide*

Getting there CallPilot System > Messaging Administration > Messaging Administration > DNs and Prefixes tab

The screenshot shows a Windows-style dialog box titled "Messaging Administration Properties - ngen655 - C:\CallPilot ...". It has five tabs: "General", "DNs and Prefixes" (which is selected), "Mailboxes", "Holidays", and "Dialing Information". The "DNs and Prefixes" tab contains three main sections. The first section has two text input fields: "Billing DN:" and "Attendant DN:". The second section is titled "Name dialing" and contains a checked checkbox labeled "Name dialing and name addressing". Below this checkbox is a text input field labeled "Prefix for name dialing and name addressing:" with the value "11" entered. At the bottom of the dialog are four buttons: "Save", "Cancel", "Print", and "Help".

To specify default billing and attendant DNs

- 1 In the Billing DN box, type the extension number that the system bills if it cannot determine a user's extension for outcall charges.
- 2 In the Attendant DN box, type the default extension number to which the system transfers callers if they press 0 during a messaging session.
- 3 When you finish configuring the system messaging options, click Save.

To enable name dialing and name addressing

- 1 Ensure there is a check mark in the Name dialing and name addressing check box.
- 2 In the Prefix for name dialing and name addressing box, type the digits that users must dial to access the name dialing feature.
- 3 When you finish configuring the system messaging options, click Save.

Specifying system-wide holiday service times

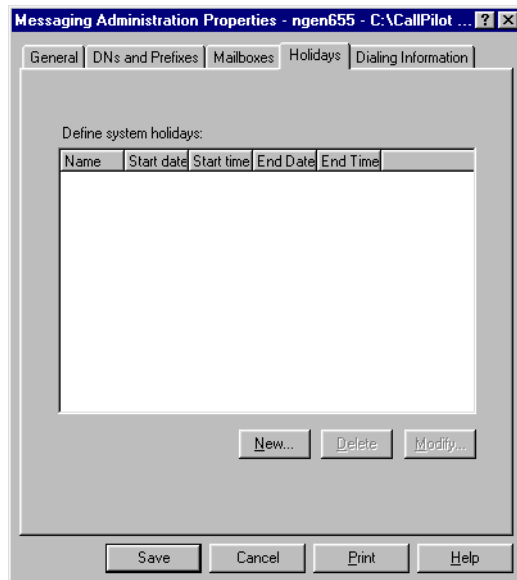
Introduction

When you set up CallPilot messaging for your organization, specify or modify the days and times of day when holiday service takes effect. This schedule affects greetings and applications created in Application Builder.

Access requirement

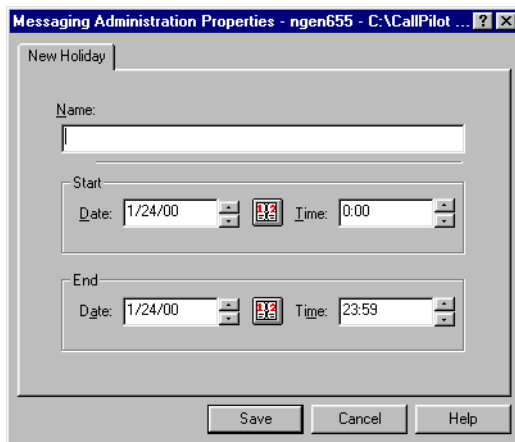
To specify holiday service times, you must belong to an access class that grants Edit access to Messaging Administration.

Getting there CallPilot System > Messaging Administration > Messaging Administration > Holidays tab



To specify a new system holiday

- 1 To create a holiday, click New.



The screenshot shows a Windows-style dialog box titled "New Holiday" within a larger window titled "Messaging Administration Properties - ngen655 - C:\CallPilot ...". The dialog box has a tab labeled "New Holiday". It contains the following fields and controls:

- A "Name:" label followed by a text input box.
- A "Start" section containing:
 - A "Date:" label followed by a date picker showing "1/24/00".
 - A "Time:" label followed by a time picker showing "0:00".
- An "End" section containing:
 - A "Date:" label followed by a date picker showing "1/24/00".
 - A "Time:" label followed by a time picker showing "23:59".
- At the bottom, there are three buttons: "Save", "Cancel", and "Help".

- 2 In the New Holiday dialog box, in the Name box, type a name that identifies the holiday.
- 3 In the Start Date box, select the day in month/day/year format when holiday service begins.
- 4 In the Start Time box, select the time of day when holiday service begins.
- 5 In the End Date box, select the day in month/day/year format when the holiday ends.
- 6 In the End Time box, select the time of day when holiday service ends.
- 7 When you finish configuring the system messaging options, click Save.

To modify holiday date or time interval

- 1 Select an existing holiday from the list.
- 2 To change the time or date of a holiday, click Modify.
- 3 In the Holiday dialog box, change the time or date.
- 4 When you finish configuring the system messaging options, click Save.

Viewing and changing system prompts

Introduction

Use the System Prompts Customization program to

- see a list of installed languages
- see a list of prompts used by Application Builder voice menus and services
- change existing prompts

Note: To add new prompts, create a new Application Builder application.

Adding a corporate identity to system greetings

A system greeting is recorded by the administrator and precedes the personal greeting of all users during a call answering session.

You can customize the content of seven system prompts. You see these seven prompts in the main window of System Prompts Customization.

Example

“Welcome to RTM Productions, Online Products Division. Hello, this is Joanna Parker. I’m not at my phone right now. Please leave a message, and I’ll return your call as soon as possible.”

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

If the prompt text is not visible

The user interface can display the prompt text only in languages with character sets supported by Windows 95/98. If the text of a prompt is not visible, use the Prompt ID to play the prompt.

Phoneset requirements for recording prompts

To record customized prompts, use a phoneset with System Prompts Customization.

Connecting

In the Specify Phoneset dialog box, define the phoneset you want to use to record customized prompts. Enter its number in the same format as you would dial the number. You must answer the phoneset when it rings.

Recording

After you click the Record button in the Voice Recorder dialog box, the system records what you speak into the phoneset. When you record, you overwrite the last recorded customized prompt. You cannot record over a WAV file.

Disconnecting

After recording a prompt, you do not have to disconnect from the phoneset by hanging up. You can stay connected and record other prompts. Disconnect only when you have finished recording all the prompts you need.

WAV file formats to use

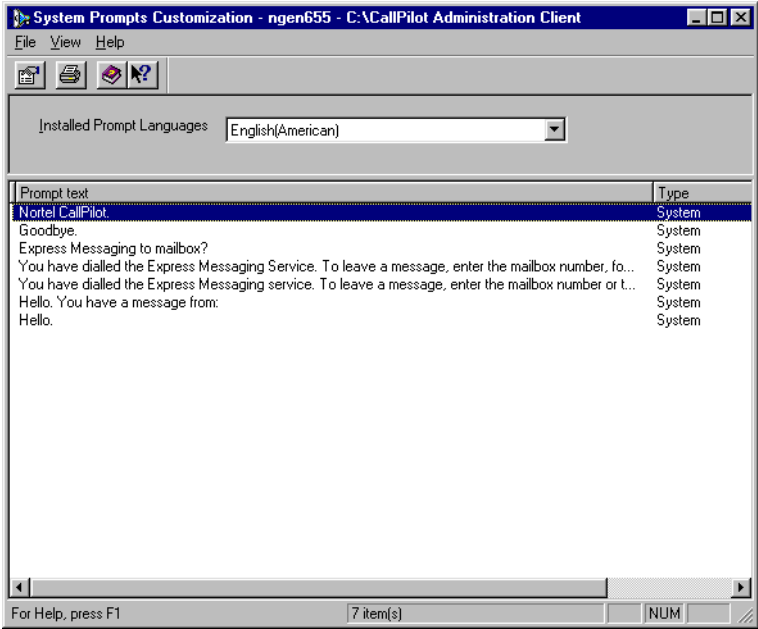
To import already recorded WAV files into System Prompts Customization, you must ensure the files are in the correct format. You can import only 8-, 11-, 22-, or 44-bit WAV (.wav) files recorded at 22 050 kHz, mono.

Access requirements

To view or play system prompts, you must belong to an access class that grants View access to System Prompts Customization.

To record or import system prompts, you must belong to an access class that grants Edit access to System Prompts Customization.

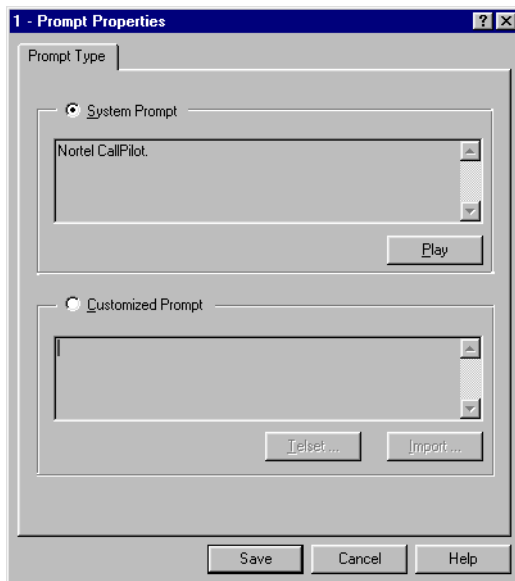
Getting there CallPilot System > Messaging Administration > System Prompts Customization



To view and change prompt properties

Note: If the system you are using does not support the prompt language, it cannot display the prompt text. To hear the prompt, follow the instructions in [“To play a system or customized prompt” on page 62](#).

- 1 Select a prompt.
- 2 On the File menu, choose Properties.



- 3 Make any changes to the prompt properties as required.
- 4 When you finish modifying the prompt properties, click Save.

To play a system or customized prompt

- 1 Select a system prompt.
- 2 On the File menu, choose Properties.
- 3 Ensure the appropriate Prompt button is selected.
- 4 Click Play.
If you have already connected to a phoneset, go to step [8](#).
- 5 In the Enter a phone number box, type the telephone number of the phoneset on which you want to listen to the prompt.
- 6 Click Dial.
- 7 When the phoneset rings, answer it before its seventh ring.
- 8 Click Play.
- 9 To stop playing the prompt, click Stop.
- 10 Click Done to stay connected to the phoneset and return to the Prompt Type dialog box.

or

Hang up to disconnect from the phoneset and to return to the Prompt Type dialog box.

- 11 Click Save.

Chapter 6

Configuring mailbox security

In this chapter

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Assigning global restriction/permission lists	69

Issues and recommendations

Introduction

When you set up your CallPilot system, you must address the following issues:

- Unused mailboxes and inadequate mailbox access controls make it easy for hackers to use your system.
- Mailboxes provide access to outdialing features, for which your organization is charged on a per-use basis.

This section provides recommendations for avoiding the unauthorized use of your system.

See also

- [“Configuring requirements for logging on” on page 67](#)
- [“Assigning global restriction/permission lists” on page 69](#)
- information about securing the CallPilot system in *Monitoring and Security for the Administrator*

Global dialing restrictions

Use the CallPilot Security Administration program to apply a global restriction/permission list (RPL) to all system users.

Restriction/permission lists (RPLs)

An RPL specifies which dialing codes are permitted and which are restricted. Whenever a CallPilot feature tries to place a call via the switch, the assigned RPL is checked to see if the call is allowed. Assign RPLs to all CallPilot features that can dial out of the system.

Note: You can assign more restrictive RPLs to some user groups or to specified CallPilot features that dial out of the system.

See also

- [Chapter 7, “Customizing dialing restrictions and permissions”](#)

Mailbox security issues and recommendations

Pay-per-minute services (900 calls)

Hackers often use corporate systems to pay for pay-per-minute services, which are accessed via a 9xx access code. Apply a global RPL to prevent all calls to pay-per-minute services.

See also: [“To customize the Long Distance 1 RPL for domestic long distance” on page 77](#)

Default passwords

Users often delay changing their default passwords, which makes it is easier for hackers to gain access to a new mailbox. To work around this user habit, configure CallPilot to generate a password prefix.

Example: If a user’s extension and mailbox number is 2339 and the password prefix is 55, the user’s default password is 552339.

Change the default password prefix regularly and include the password prefix in data files used to add groups of CallPilot users.

See also:

- [“To set global mailbox password options” on page 68](#)
- [“Adding a group of users all at once” on page 104](#)

Unused mailboxes

Hackers look for the following signs that indicate that a mailbox is unused. They look for mailboxes

- that do not have recorded spoken names (personal verifications)
- with the default greeting “The person at extension 8522 is not available to take your call.”
- with no messages or with old messages

Delete unused mailboxes to keep hackers out of your system.

See also: information on protecting the system against hackers in *Monitoring and Security for the Administrator*

Users' password habits

Users often repeat favorite passwords and choose passwords that are easy to hack.

Nortel Networks recommends that you take the following actions:

- Force users to change their passwords regularly as a good security practice. By default, users must change their passwords every 90 days.
- Play a warning message a few days before users' passwords expire so that they can change the password before it expires. The default is five days. The warning message plays once each day until the password is changed.
- Ensure that users change their passwords to new passwords, rather than entering the same passwords. By default, users must enter five new passwords before they can reuse an old password.
- Educate users about how to create secure passwords to increase system security.

Note: Security experts recommend a minimum length of six digits, but eight-digit passwords provide more security.

See also: [“To configure mailbox access controls” on page 68](#)

User education and guidelines

The following guidelines can help users to create better passwords. Let users know about the security risks involved and why these measures are important.

- Do not use obvious dates, names, and words (such as favorite hobbies, food, and so on).
- Use phonetic versions of meaningful words that are easy to remember.
Examples: whyzkrak, phabuluss
- Use numbers in place of some letters. These are hard for password-cracking programs to match.
Examples: 4ainbow, 8ookworm, pu22led
- Use combinations of words that result in non-words.
Examples: apecar, teaflower

Configuring requirements for logging on

Introduction

Use the CallPilot Security Administration program to define mailbox logon requirements for all system users. Enable and configure security options that control external logons and limit the number of unsuccessful logon attempts.

Access requirements

To configure logon requirements, you must belong to an access class that grants Edit access to Security Administration.

Getting there CallPilot System > Messaging Administration > Security Administration > General tab

The screenshot shows the 'Security Administration Properties' dialog box with the 'General' tab selected. The title bar reads 'Security Administration Properties - ngen655 - C:\CallPilot Ad...'. The 'General' tab is active, with other tabs being 'CLIDs', 'Mailboxes', and 'AppBuilder'. A section for 'Call answering/ express messaging thru-dial restriction permission list' contains a dropdown menu set to 'On Switch' and a 'Properties...' button. Below this is the 'Passwords' section with fields for 'Prefix' (61741), 'Minimum length' (6), 'Maximum days permitted between changes' (90), 'Expiry warning' (5), and 'Minimum number of changes before repeats' (5). A checkbox for 'External logon' is checked. The 'Maximum invalid logon attempts' section has 'Per mailbox' set to 9 and 'Per session' set to 3. At the bottom are 'Save', 'Cancel', 'Print', and 'Help' buttons.

Field	Value
Prefix	61741
Minimum length	6
Maximum days permitted between changes	90 days
Expiry warning	5 days
Minimum number of changes before repeats	5
External logon	<input checked="" type="checkbox"/>
Per mailbox (invalid attempts)	9
Per session (invalid attempts)	3

To configure mailbox access controls

- 1 To let users access their mailboxes from external phonesets, make sure the External logon check box is checked.
- 2 In the Per mailbox box, type the number of unsuccessful logon attempts that can be made on a mailbox in its lifetime. The default value is 9.
- 3 In the Per session box, type the number of unsuccessful logon attempts a user can make in a single mailbox session. The default value is 3.

Note: For IMAP client types using the IMAP logon command, the invalid logon count is increased by 2 instead of 1. To make the Per mailbox and Per session attempts less restrictive to these types of clients, set the maximum invalid logon attempts to 12 and 4 or 18 and 6 respectively.

To set global mailbox password options

- 1 In the Prefix box, type the number that precedes the default password.
- 2 In the Minimum length box, type the smallest number of digits that passwords can contain.
- 3 In the Maximum days permitted between changes box, type the number of days that a password is valid before a user must create a new password.
- 4 In the Expiry warning box, type the number of days before password expiry that the user receives an expiry warning.
- 5 In the Minimum number of changes before repeats box, type the number of different passwords users must create before recycling an old password.

Assigning global restriction/permission lists

Introduction

The global RPL governs the Call Answering, Express Voice Messaging, and thru-dialing session of all CallPilot system users.

Supplied RPLs

By default, the supplied RPLs prevent all off-switch dialing. Customize the supplied RPLs to meet the requirements of your system.

CallPilot provides the following RPLs:

- On Switch
- Local
- Long Distance 1
- Long Distance 2

Access requirements

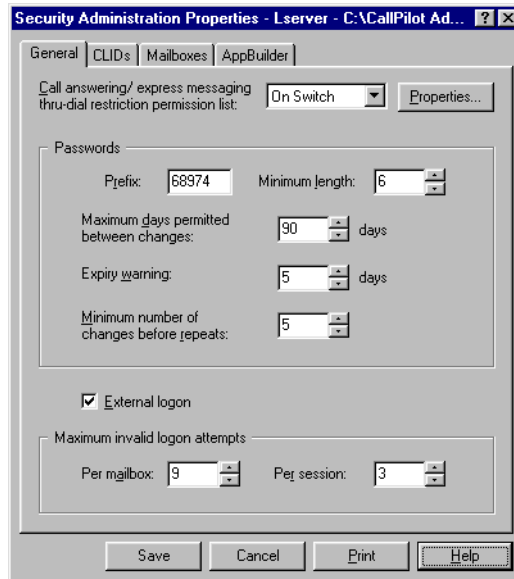
To assign the global RPL, you must belong to an access class that grants Edit access to Security Administration.

See also

- [Chapter 7, “Customizing dialing restrictions and permissions”](#)

Getting there

CallPilot System > Messaging Administration > Security Administration
> General tab



To select the global RPL

- 1 In the Call answering/express voice messaging thru-dial restriction permission list box, select the RPL that best describes how strictly you want to govern the outcalling activities of your users:
 - To prevent all off-switch dialing, select On Switch.
 - To prevent all long distance dialing, select Local.
 - To prevent all international long distance dialing, select Long Distance 1.
 - To allow all off-switch dialing, select Long Distance 2.
- 2 To view the RPL configuration, click Properties.

Chapter 7

Customizing dialing restrictions and permissions

In this chapter

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Dialing restrictions and permissions

Introduction

On newly installed systems, all CallPilot features that are capable of outdialing are restricted. This means that digits 0–9 are restricted and no codes are permitted. None of these features work until you redefine some of the restriction/permission lists and apply the new lists to these features.

RPLs

An RPL specifies whether a dialing code is permitted or restricted. Whenever a CallPilot feature tries to place a call via the switch, the assigned RPL is checked to see if the call is allowed. Assign RPLs to all CallPilot features that can dial out of the system.

Global RPLs

Global RPLs apply to all users on the system. They must permit all on-switch dialing. See [“Customizing supplied RPLs” on page 75](#).

Mailbox class RPLs

RPLs are applied in mailbox classes for the following outdialing features:

- External Call Sender
- Mailbox Thru-Dialing
- Custom Revert
- Delivery to Telephone and Delivery to Fax
- AMIS Open Networking
- Remote Notification
- Fax Printing
- Desktop Messaging (This RPL applies to messages composed from the Desktop. It is imposed in addition to any other RPLs that apply to the message.)

Application-specific RPLs

For services created with Application Builder, RPLs are assigned in one of two places.

- For services that include a thru-dial block, the RPL is assigned to the block in the application.
- For services that include fax select blocks and that allow callback fax delivery (enabled within the session profile), the RPL is assigned to the entire service in the service's SDN configuration (on the Callback Handling tab).

Dialing codes

The restriction codes in an RPL set the general dialing rules. Permission codes indicate any exceptions to the rules described by the restriction codes.

Restriction code

A restriction code is a dialing code that CallPilot cannot dial. When CallPilot is requested to call a number or send a message to a number that begins with a restricted code, the call is blocked. Restriction codes can be up to 20 digits long.

Permission code

A permission code is a dialing code that CallPilot can dial. When CallPilot is requested to call a number or send a message to a number that begins with a permitted code, the call is placed. Permission codes can be up to 20 digits long.

Recommendations for common Voice Messaging features

When you customize your supplied RPLs, consider the Voice Messaging on your system. This section provides some recommendations for commonly used Voice Messaging features.

Call Answering/Express Voice Messaging thru-dial

With the Call Answering and Express Voice Messaging features, a caller is forwarded to a user's mailbox to leave a message. At this point, the caller can dial 0 followed by a number to thru-dial.

Be very restrictive when assigning an RPL to these features. Select an RPL that allows callers to thru-dial to internal extensions only. Restrict these features from dialing out to the public network.

Mailbox thru-dial

With Mailbox thru-dialing, once a user has logged on to the mailbox, he or she can thru-dial to another number by dialing 0, followed by the number.

Mailbox thru-dial is intended for mailbox users, not for external callers. To prevent abuse of this feature, allow thru-dialing to on-switch extensions only.

External Call Sender

While listening to a message, a mailbox user can press 9 to place a call to the sender of the message. Call Sender places the call if the calling line ID (CLID) is known and if the assigned RPL permits outcalling to the CLID.

Plan user groups (mailbox classes and user templates) and assign RPLs to prevent unwanted charges from Call Sender activity.

Custom revert

Users can define their own custom revert DN's from their phonesets while logged on to their mailboxes (to revert callers to a departmental secretary, for example, instead of the main switchboard). If a mailbox is compromised, a hacker can define the number of a long distance carrier as the custom revert DN.

Plan user groups (mailbox classes and user templates) and assign RPLs to prevent unauthorized chargeable calls.

Note: If a user needs to revert calls to a long distance number, you can set this up in that user's profile, because the RPL applies only to the user and changes made from the phoneset.

AMIS Open Networking

If you have AMIS Open Networking, users can compose and send messages to mailboxes on other messaging systems on the open (public) network. This openness allows hackers established on your messaging systems to charge their costs to your customer.

Plan user groups (mailbox classes and user templates) and assign RPLs to prevent unnecessary AMIS Open Networking calls.

Customizing supplied RPLs

Introduction

There are four prenamed RPLs on newly installed systems. Initially, the restriction codes for these lists are digits 0–9 so that no off-switch dialing is permitted.

For some organizations, these four lists are sufficient. Organizations that have more complex requirements need additional lists (up to 200).

Supplied RPLs

CallPilot supplies the RPLs that a typical system requires. Select the one that you want to apply globally and customize it according to the customer's needs.

On Switch

You can customize this list so that it allows only on-switch numbers to be called. All off-switch numbers, including local numbers, are restricted. This is the most secure RPL. Apply it to features when maximum security is required.

Local

You can customize this list so that it allows both on-switch and local numbers to be called, but restricts your long distance and international access codes. This RPL provides a degree of security since the only off-switch numbers allowed are local.

Note: The Local RPL is the default applied to all mailbox classes. If you do not customize this RPL before you try to specify a revert DN, a callback DN, or an MWI DN for users or user groups, the operation fails.

Long Distance 1 and Long Distance 2

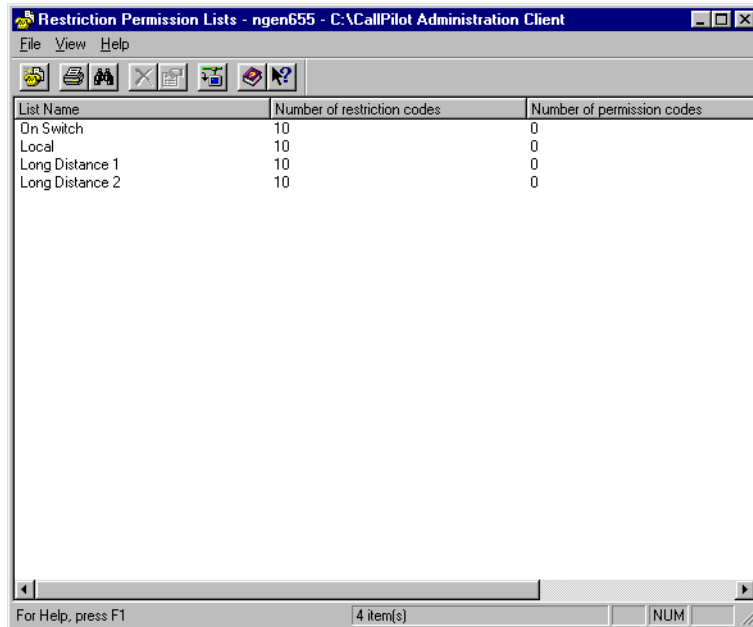
You can customize these lists to allow CallPilot to call long distance and international numbers. Be cautious about the dialing codes you permit, and be careful about the features to which you apply these less secure lists.

Access requirements

To customize existing RPLs, you must belong to an access class that grants Edit access to Restriction Permission Lists.

Getting there

CallPilot System > Messaging Administration > Restriction Permission Lists



To customize the On Switch RPL

Note: For most systems, all restriction codes can be removed.

- 1 Remove unnecessary restriction codes:
 - a. In the Restriction codes list, hold the Ctrl button and click all numbers you need to remove.
 - b. Click Remove.
- 2 Click Save.

To customize the Local RPL

- 1 For each permission code you need to add (such as the dialing prefix to get an outside line):
 - a. In the Permission box, type the number (for example, 9).
 - b. Click Add.
- 2 Remove unnecessary restriction codes:
 - a. In the Restriction codes list, hold the Ctrl button and click all numbers you need to remove.
 - b. Click Remove.
- 3 Add any restriction codes required to prevent calls to local numbers that you do not want users to dial:
 - a. In the Restriction box, type the number (for example, 9555 to prevent all calls to local exchange 555).
 - b. Click Add.
- 4 Click Save.

To customize the Long Distance 1 RPL for domestic long distance

- 1 Add the permission code to allow access to a long distance line:
 - a. In the Permission box, type the dialing prefix for a long distance line (for example, 91).
 - b. Click Add.
- 2 For each restriction code required to prevent calls to pay-per-use services:
 - a. In the Restriction box, type the number (for example, 91900).
 - b. Click Add.
- 3 For each restriction code required to prevent overseas calls:
 - a. In the Restriction box, type the number (for example, 91011).
 - b. Click Add.
- 4 Remove unnecessary restriction codes:
 - a. In the Restriction codes list, hold the Ctrl button and click all numbers you need to remove.
 - b. Click Remove.

- 5 Click Save.

To customize the Long Distance 2 RPL for international long distance

- 1 Add the permission code to allow access to a long distance line:
 - a. In the Permission box, type the dialing prefix for a long distance line (for example, 91).
 - b. Click Add.
- 2 For each restriction code required to prevent calls to pay-per-use services:
 - a. In the Restriction box, type the number (for example, 91900).
 - b. Click Add.
- 3 Add the permission code to allow access to an overseas long distance line:
 - a. In the Permission box, type the dialing prefix for a long distance line (for example, 91011).
 - b. Click Add.
- 4 For each restriction code required to prevent calls to countries that are off-limits to your users:
 - a. In the Restriction box, type the number (for example, 91011996).
 - b. Click Add.
- 5 Remove unnecessary restriction codes:
 - a. In the Restriction codes list, hold the Ctrl button and click all numbers you need to remove.
 - b. Click Remove.
- 6 Click Save.

Chapter 8

Controlling access to administration programs

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Multiple CallPilot administrators

Introduction

When the CallPilot Administration Client is installed, a system administrator with Create/Delete access to all system resources is automatically created.

You can create multiple administrator accounts so that administrators can specialize in tasks such as maintaining users, performing backups, analyzing reports, or creating multimedia services.

Access classes

Access classes are a way to specify levels of administrative access to each program on the system. Once set up, you can assign classes to users who administer or observe the configuration of your system.

An access class consists of a set of program names (one for each program in the CallPilot System tree), each with an associated access level. These levels are explained in [“Access levels” on page 81](#).

Create access classes to give each administrator access only to those parts of the system that relate to his or her role. You can also use access classes to give View only privileges to interested customer staff, such as certain managers.

Default access class for system administrators

The Administrator access class is already assigned to the prepackaged Administrator user template. Use this template to create users who have full system access.

Preventing access to administrative information

To prevent users from accessing administrative information, ensure that there is no check mark in the Admin check box of user creation templates that will be used to add general users to the system. Even if an access class has been assigned to the template, removing the check mark prevents it from being applied.

Applying access classes

After you create an access class, assign it to a user template. Then, when you add a user to the system with the template, the user becomes a member of the access class specified in the template. If a user's job requirements change, you can assign or reassign the user to the access class that gives only those administrative privileges required.

See also

- [Chapter 9, "Adding a mailbox user group"](#)

Access levels

Access levels determine a user's ability to interact with CallPilot programs. You can assign one of six access levels to a CallPilot program.

Create/Delete

Users can add, remove, and change the information stored by a program.

Create/Delete mailbox users only

Users can add, remove, and change only mailbox user information. Users with this access level cannot create user templates with administrative capability. The user sees the administrative capability as read-only information.

Edit

Users can change the information stored by a program, but they are not allowed to add new information or delete existing information.

Edit mailbox users only

Users with this access level can change mailbox user information only. They can view but not change the administrative capability assigned to a user template.

View

Users can look at the information stored by a program, but they are not permitted to add, remove, or change information.

None

Users cannot access any administration program information.

Guidelines for planning access classes

Introduction

Use an access class to define a set of privileges for a particular type of administrator. Administrators whose accounts are created using the same access class belong to the same administrator group. Name each access class after its administrator group.

Never assign access classes to general users who have no need for administrative information or capability.

Defining a set of access classes for an organization

Before creating access classes, identify the various types of users that require access to administrative programs. Based upon their roles, determine

- the programs each group needs to access
- the access level the group needs for each program

Example

If the CallPilot system is completely set up by the distributor, and then turned over to a customer for routine administration, access classes are required for the following people:

- distributor project manager
- distributor project analyst
- distributor switch technician
- customer security administrator
- customer user administrator
- customer telecom manager

Note: This example is not complete or comprehensive.

Administrator group	Required programs	Access level
Distributor project manager	All programs	Create/Delete
Distributor project analyst	Access Classes	Create/Delete
	Service Directory Number	Create/Delete
	User Creation Templates	Create/Delete
Distributor switch technician	Alarm Monitor	Create/Delete
	Serial Ports	Edit
	Switch Resource	Edit
	System Configuration	Edit
Customer security administrator	Alarm Monitor	View
	Connected Sessions	Create/Delete
	Saved User Searches	Edit
	Security Administration	Edit
Customer user administrator	AutoAdd	Create/Delete mailbox users only
	Saved User Searches	Edit mailbox users only
	User Creation Templates	View
	Users	Create/Delete

Configuring access classes

Introduction

Create an access class to specify

- the administrative programs to which a specific administrator type has access
- the level of access allowed to each program

Create the appropriate access classes before adding new administrative users to your system.

See also

- [“Multiple CallPilot administrators” on page 80](#)
- [“Guidelines for planning access classes” on page 83](#)
- [“Customizing settings for a user group” on page 99](#)
- [“Changing access to administrative programs” on page 159](#)
- [“Cloning an existing template” on page 282](#)

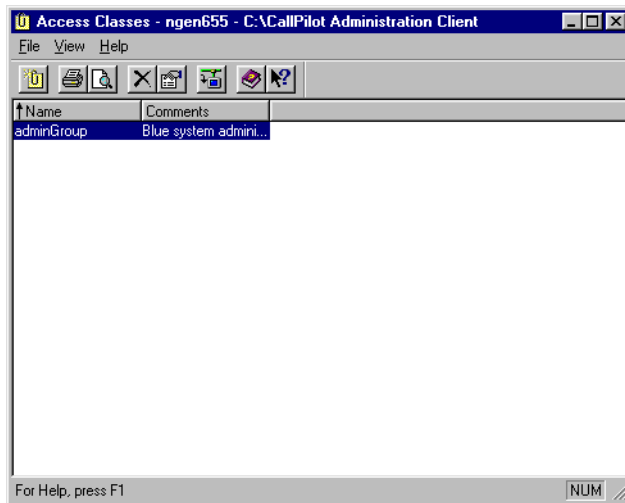
Before you begin

Before modifying an access class, view a list of the users assigned to it. Before creating access classes, identify the various types of users in your company and the levels of access they require to perform system administration. See [“Guidelines for planning access classes” on page 83](#).

Access requirements

To view access class information, you must belong to an access class that grants View access to Access Classes.

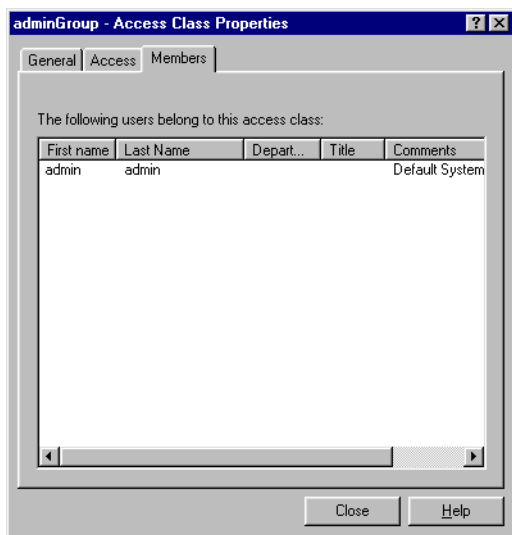
To create, delete, or rename an access class, you must belong to an access class that grants Create/Delete access to Access Classes.

Getting there CallPilot System > User Administration > Access Classes**To view the users assigned to an access class**

Note: You cannot assign users to an access class from the Access Classes main window. See [“Changing access to administrative programs” on page 159](#).

- 1 Click the name of the access class that you want to view.
- 2 On the File menu, click Properties.

- 3 Click the Members tab.



Note: To sort the list, click a column heading.

- 4 Click Save.

To rename an access class

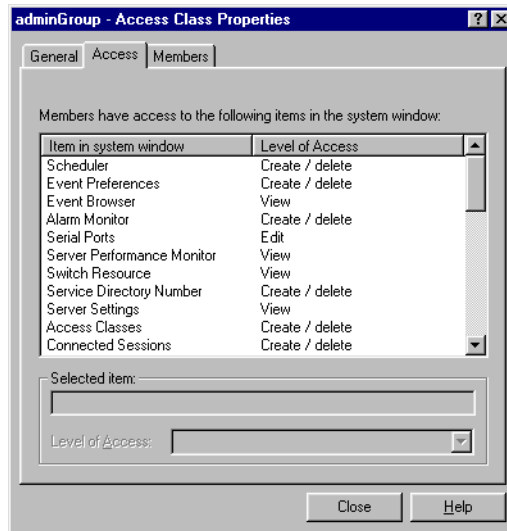
- 1 Click the access class you want to rename.
- 2 On the File menu, click Properties.
- 3 On the General tab, edit the name in the Name box by typing a more appropriate name for the access class.

Example: Change User Accounts to User Maintenance.

- 4 Click Save.

To create an access class

- 1 On the File menu, choose New.
- 2 Under the General tab, in the Name box, type a name for the access class.
- 3 Click the Access tab.



- 4 For each program:
 - a. In the Item in system window list, select a program.
 - b. In the Level of Access list, select the access level you want to assign to the administrator group.
- 5 When you are finished, click Save.

To delete an access class

Note: Before deleting an access class, you must assign its users to a new access class. You also need to specify a new access class for any user templates associated with the obsolete access class.

- 1** Select the access class you want to delete.
- 2** On the File menu, click Delete.
Result: A confirmation dialog box appears.
- 3** Confirm that you want to delete the selected access class by clicking OK.

Chapter 9

Adding a mailbox user group

In this chapter

Overview of User Creation Templates	92
Overview of the AutoAdd feature	95
Customizing settings for a user group	99
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Overview of User Creation Templates

Introduction

User Creation Templates facilitate the creation and maintenance of large numbers of mailbox users.

Create a user template to configure the common capabilities required by each group of users. For example, salespeople can require a certain feature setup, while clerical staff and administrators require a different setup.

After you create a set of templates, use them to add user mailboxes to the system—either as individuals or in groups.

When you configure the settings in a template, those settings appear as defaults for any new user mailbox that you create with that template. You can then fill in the user's name, mailbox number and password, and make changes to the default feature settings if desired.

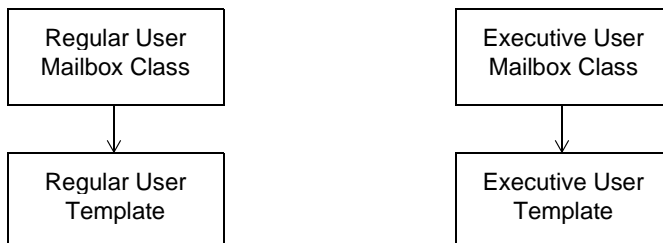
Relationship between mailbox classes and user creation templates

For the supplied mailbox classes and supplied local mailbox user creation templates, there is a one-to-one correspondence between the two.

Examples

- The Regular User mailbox class corresponds to the Regular User template.
- The Executive User mailbox class corresponds to the Executive User template.

A graphical representation looks like this:



Users are not linked to templates after creation

The template is a starting point for creating the user. After you create a user, there is no link between the template and the user. If you create a user and then change the settings in the template, this does not affect the settings for the already-created user.

Types of users

There are three types of CallPilot users: local users, directory entries, and remote users. This chapter focuses on local users.

See also

- Part 3, “[Extending system functionality](#)”

Local users

A local user can have all the capabilities offered to a mailbox. These capabilities include various greetings, messaging and call answering, and multiple DNs. The majority of users on your system are local users.

Supplied Local User templates

CallPilot provides prepackaged Local User templates. When you first set up your CallPilot system, decide which of the supplied templates you need and then customize them to suit your needs. You can use the following six templates to create various local users:

- Administrator Template
- Assistant Template
- Basic Users Template
- Executive Users Template
- Fax Buffering Mailbox Template

This template lets you create a fax-capable mailbox for a fax machine. For more information, see Part 3, “[Extending system functionality](#).”

- Regular Users Template

What are capabilities?

The term capabilities refers to the set of system functions a user has permission to access. In CallPilot, you can assign two kinds of capability.

Administrative capability

Administrative capability, which means the user has some level of access to Administrative Client programs, is reserved for users who administer the system. Most users do not require this capability.

Administrators can have varying levels of access to administer programs on the system, depending on the access class to which they belong.

Mailbox capability

Mailbox capability means the user has a mailbox and can use the mailbox's messaging options. Most or all users require mailbox capability.

A mailbox class is associated with each template

Each prepackaged template is also associated with a prepackaged mailbox class of the same name. For example, the Executive mailbox class includes additional messaging capabilities; it is the default user class for the Executive template.

Overview of the AutoAdd feature

Introduction

In CallPilot, a user represents one person who needs to interact with the system as an administrator, a mailbox user, or both.

The AutoAdd feature provides a quick way to add many users who share the same mailbox capabilities, such as students in a university dormitory. Select or create a user template (or set of user templates), and then use the AutoAdd feature to translate a data file that contains unique user information, such as the user's name and mailbox number, into new users. After you create a user, you can change any of the preconfigured settings provided by the template.

Note: You cannot use this feature to create directory entries or remote users.

Password prefix

To avoid problems using the AutoAdd feature, either define a security password prefix or ensure that the data file does not contain a trivial password.

The system validates the mailbox password when a user is added. The password

- cannot be the same as the mailbox number
- must have a minimum length defined in the Security profile

If the password is not one of the input parameters from the source data file, the system generates a password automatically by attaching the security prefix to the user's mailbox number. This automatic generation fails if the security prefix and mailbox number together do not meet the minimum password length.

For more information, see [“Security password requirements” on page 97](#).

The AutoAdd log file

The AutoAdd feature records in a log file all problems with the data file. The log file lists all successful and unsuccessful additions. Use the log file to troubleshoot the data file.

Template requirements

All the users you create at once share the same feature configuration, because the new users are all based on the same template. You must create the template before you begin. If you do not have a template that is appropriate for your purposes, see [Chapter 21, “Adding user creation templates.”](#)

You can inspect a read-only version of the template to confirm that the settings are appropriate for the users you are creating. If the template is not appropriate, create a new template or modify an existing one, before you proceed.

You cannot change these values in the template during the AutoAdd procedure, but after the users are created, you can change any configuration details—except Volume ID—on an individual basis.

Distributing users across more than one volume

When you use the AutoAdd feature, you base an entire group of users on the same template. That means that all users have the same Volume ID; their mailboxes reside on the same volume on the hard drive.

If you create too many users with the same Volume ID, the volume on the hard drive can run out of storage space. Limit the number of users that you add to the same volume.

To automatically distribute users across volumes during a single AutoAdd operation, enable the utility to automatically distribute mailboxes across volumes in the user creation template that defines mailbox and administrative capabilities for the new users.

To manually distribute users across volumes, divide large groups of users into smaller groups and perform AutoAdd on the smaller groups, changing the Volume ID in the template each time. This way you spread the users across the hard drives.

See also

- [“To add or change default mailbox capabilities” on page 100](#)

Security password requirements

When you use the AutoAdd feature, ensure that either the input data file contains valid mailbox passwords or the Security prefix is defined. You can do this in one of the following ways:

- Use a mailbox password from the data file.
The mailbox password defined in the data file must not be trivial (for example, the same as the mailbox number or consecutive numbers, such as 1234). Additionally, the minimum password length must be defined in Security Administration.
- Use a system-generated mailbox password.
The password prefix must be defined in Security Administration. The prefix and mailbox number together must meet the minimum password length. For more information, see [Chapter 6, “Configuring mailbox security.”](#)

Attention

If a Security password prefix is not defined, or if the data file contains a password that cannot be validated by the system, the AutoAdd feature fails to create users.

Data file requirements

The data file provides the raw data for each new user that you create. This data includes unique user information, such as names or mailbox numbers. The data file is in ASCII format and lists user field values separated by commas or tabs. Each line ends with a carriage return.

Every line of the data file must have the same number of columns, and the following fields must be represented in the columns:

- First Name
- Last Name
- Mailbox Number

You can add additional columns and information, as in the “[Example data file format](#)” on the next page.

Note: You might need to set up the conversion process so that the mail system overlooks parameters in the data file that do not apply or that are irrelevant to mail users. For instructions, see [“To add multiple members to a user group” on page 106.](#)

Example data file format

In the data file, each user’s values occupy an entire line. A carriage return separates each line, as shown in the following example:

```
Naoko,Kusaka,9T66,6237
Piedro,Ramirez,9T66,6195
Cathy,Travell,9T44,7738
```

Data file values are matched up with CallPilot user values

You must associate the values from the data file with CallPilot user values so that they are in one-to-one correspondence.

CallPilot user fields	Data file element
First Name	Naoko Piedro Cathy
Last Name	Kusaka Ramirez Travell
Department	9T66 9T66 9T44
Note: This field must be added to the list of CallPilot user fields on the AutoAdd dialog box.	
Mailbox Number	6237 6195 7738

Customizing settings for a user group

Introduction

To customize settings for a user group, modify the property sheets of the user creation template to be applied to group members. Fill in the remaining fields when you create a user based on the template.

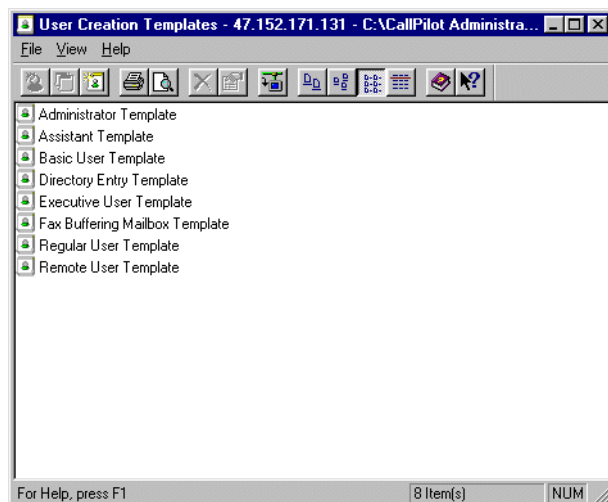
Access requirements

To modify properties for an existing user group (user creation template), you must belong to an access class that grants Edit access to User Creation Templates.

See also

- [“Adding a group of users all at once” on page 104](#)
- [Chapter 8, “Controlling access to administration programs”](#)
- [Chapter 10, “Configuring mailbox capabilities for a user group”](#)

Getting there CallPilot System > User Administration > User Creation Templates



To open an existing template for modification

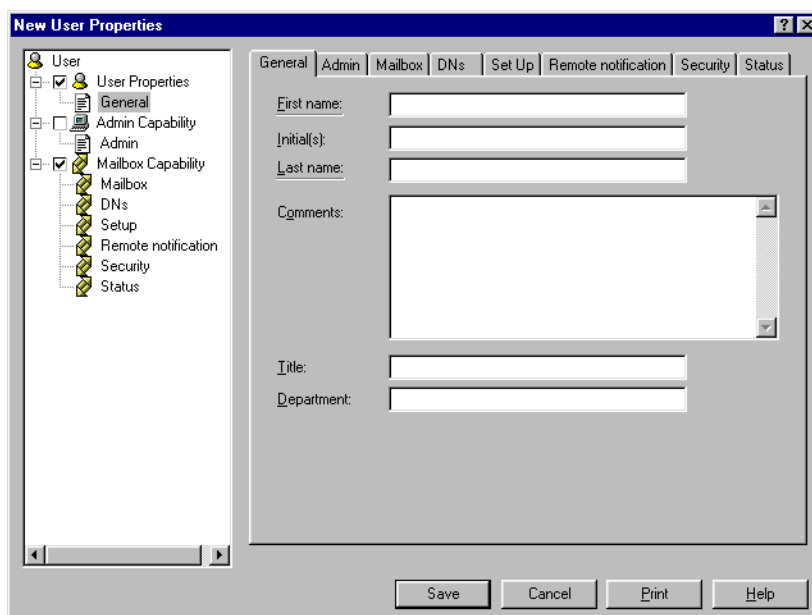
ATTENTION

To change a template, you must open the template properties sheet. When you double-click a template name to open it, you are adding a new user to the user group.

From the File menu, select Properties.

To add or change default mailbox capabilities

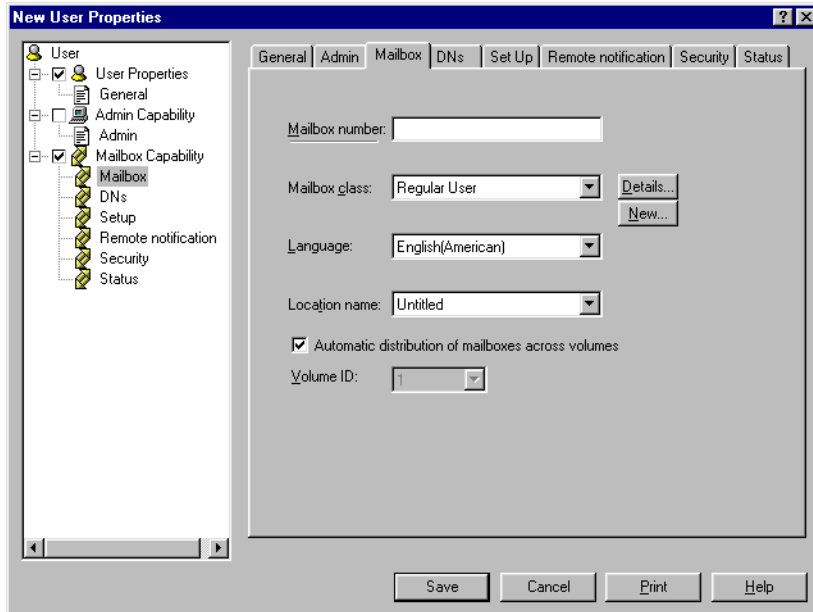
- 1 Open a user template and make sure there is a check mark in the Mailbox Capabilities check box.



- 2 Specify the default Mailbox Class (see page [101](#)).
- 3 Set up the Revert DN (see page [102](#)).
- 4 Configure the default messaging options (see page [103](#)).
- 5 Click Save.

To assign a default mailbox class

- 1 Click the Mailbox tab.



- 2 In the Mailbox class list, select the mailbox class appropriate for the group.
- 3 *For users who prefer another language:* From the Language list, select the preferred language for mailbox prompts.

Note: The user hears the primary language after he or she logs on to the mailbox.

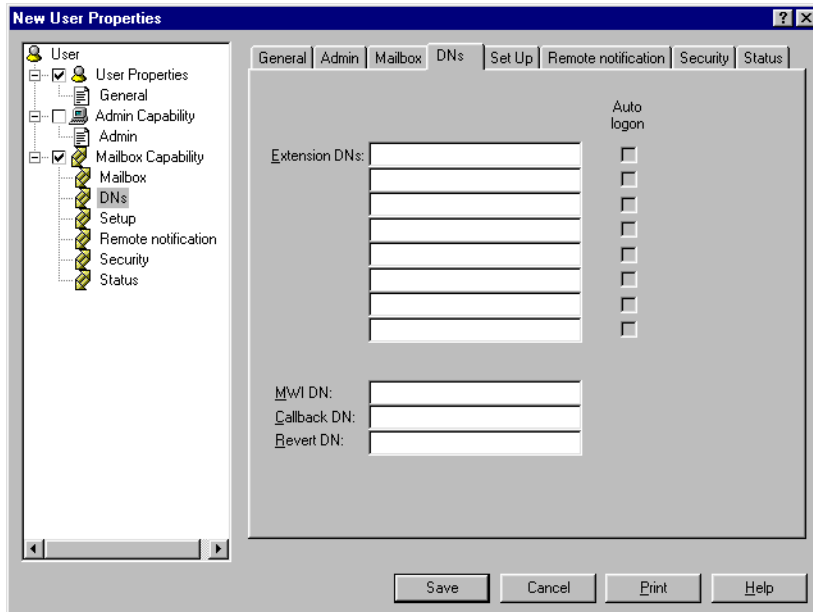
- 4 Specify whether the new mailboxes are to be stored on a specific volume or automatically distributed across volumes:
 - To distribute users proportionately across volumes, ensure there is a check mark in the Automatic distribution of mailboxes across volumes check box.
 - To define the volume on the hard drive where the system stores the user data for users created with this template, from the Volume ID list, select the desired volume number.

Note: You cannot change this volume later in User Administration.

To specify the default revert DN for a user group

Note: A revert DN is the common DN to which callers are forwarded when they press 0 on the phoneset keypad. If the RPL assigned to the mailbox class has not been modified, you cannot specify the revert DN. The Local RPL is the default.

- 1 Click the DN's tab.



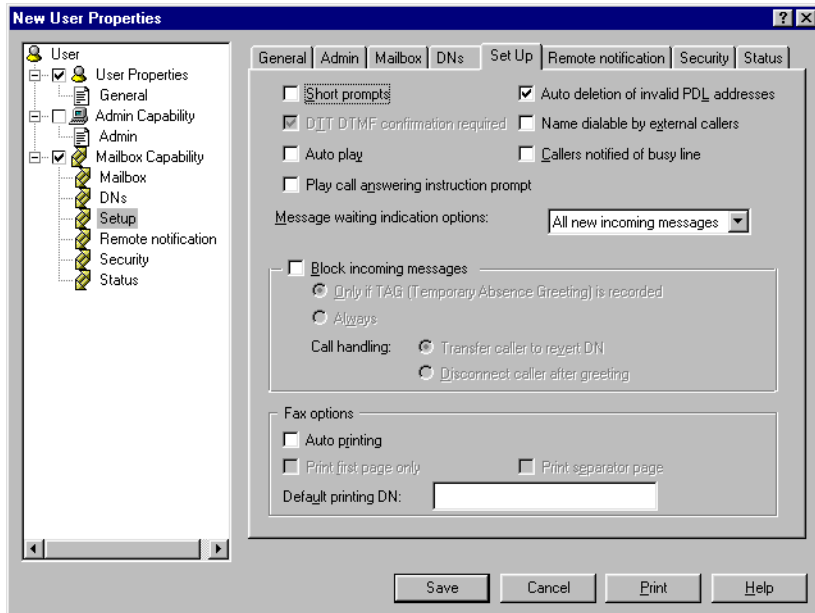
- 2 Type the DN of the receptionist or departmental administrative assistant in the Revert DN box.

See also

- [“Customizing supplied RPLs” on page 75](#)

To specify default messaging options for a user group

- 1 Click the Set Up tab.



- 2 Specify the messaging options for the user group. To learn more about a specific field, use the context-sensitive Help.
- 3 To define the type of messages that will trigger the flashing light on a user's phoneset, select an option from the Message waiting indication options list.

Adding a group of users all at once

Introduction

Use the following procedures to add a group of users based on the same template, to a CallPilot system.

Note: If the data file you select includes users that are already on the system, CallPilot does not add, overwrite, or duplicate the existing record. For an explanation of why users are not added, display the log file, which is a text file located in the same directory as the selected data file.

Before you begin

Ensure that you are aware of the password requirements outlined in [“Overview of the AutoAdd feature” on page 95](#).

Access requirements

To add users to a user group, you must belong to an access class that grants either Create/delete or Create/delete (mailbox users only) access to Users.

To add a group of users to the CallPilot system

- 1 Identify or create the ASCII file that contains the raw user data (see [“Data file requirements” on page 97](#) and [“To create a data file” on page 105](#)).
- 2 Ensure that you have the required user templates (see [“To identify the required user templates” on page 105](#)).

Attention: Ensure your template contains the appropriate feature configuration for your users. If you want to distribute your users across more than one volume, ensure that the utility to automatically distribute users across volumes is enabled.

- 3 Use the AutoAdd feature to convert the data in the ASCII file to CallPilot data (see page [106](#)).

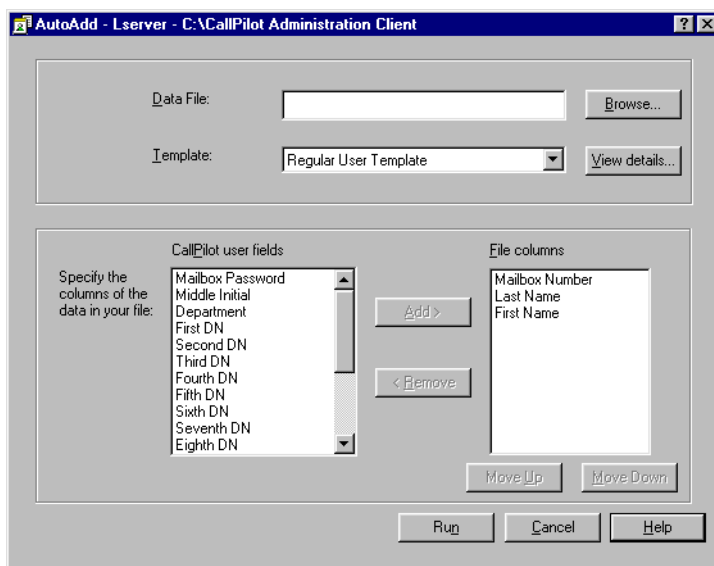
To create a data file

You can create a data file containing lists of user information from a variety of sources. For example, you can create the data file manually, using a word processor or a text-editor application. You can also create the data file by extracting a flat file from a database of individuals or from a spreadsheet.

Tip: To help you set up the AutoAdd operation, print the file so that you can easily identify the position of each column of information.

To identify the required user templates

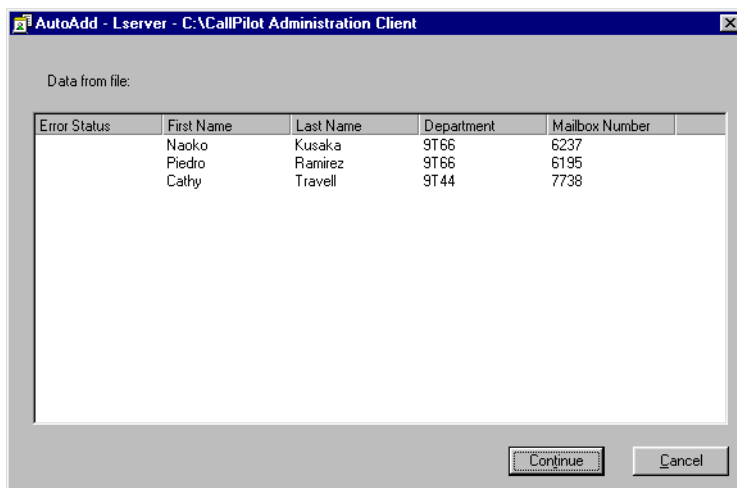
- 1 From the User Administration User Creation Templates list, select the template for this user group.
- 2 Click View details to see the contents of the template.
Note: If the current one is not correct, select another template.
- 3 Decide which template best meets your requirements.
- 4 Determine whether the template needs to be modified or cloned. See
 - [“Customizing settings for a user group” on page 99](#)
 - [Chapter 21, “Adding user creation templates”](#)
- 5 Close the template to return to User Administration.

Getting there CallPilot System > User Administration > AutoAdd**To add multiple members to a user group**

- 1 In the AutoAdd dialog box, click Browse.
- 2 In the Browse window, find the path to your data file.
- 3 Click the data file and then click Open.
- 4 In the Template box, select the user template to provide the configuration for all the new users.
- 1 For each field name that has a corresponding value in the data file:
 - a. Click the CallPilot user field name to select it.
 - b. Click Add to include it in the File columns box.
- 2 For each data file element that you do not want to include as CallPilot information:
 - a. In the CallPilot user fields list, click <Ignore>.
 - b. Click Add to include <Ignore> in the File columns box.

- 3 For each entry in the File columns box that does not correspond to any data in the data file, you must remove the entry:
 - a. In the File columns box, select the file column you want to delete.
 - b. Click Remove to delete the file column.
- 4 Ensure that the order of the field names and <Ignore> entries in the File columns box matches the order in which the data appears in the data file. Use the Move Up and Move Down buttons to rearrange the order of the field names and <Ignore> entries.
- 5 Click Run.

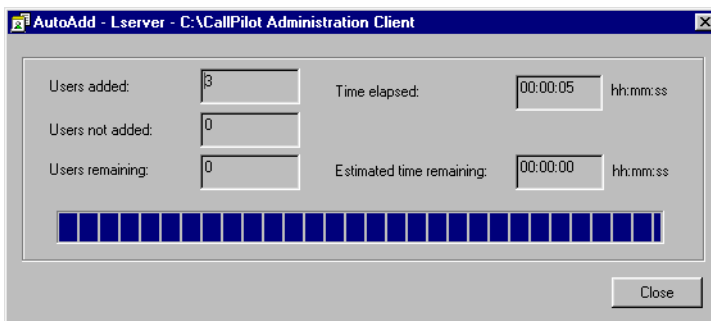
Result: The AutoAdd dialog box displays the user data as the program interpreted it.



- 6 Verify that the user data is properly classified.

- 7 Click Continue and wait a few seconds while the new members are added to the user group.

Result: AutoAdd creates a log file that displays the results of the operation.



- 8 If the results showed that the operation failed, open the log file in any text editor and view the error messages. The error log is created in the same folder as the user data.

Chapter 10

Configuring mailbox capabilities for a user group

In this chapter

Mailbox classes and user groups	110
Configuring mailbox storage capacity	112
Configuring dialing restrictions and permissions	114

Mailbox classes and user groups

Introduction

A mailbox class is a way to define messaging capabilities for a group of users.

To have any mailbox capabilities, a mailbox user must have a mailbox that belongs to a mailbox class.

Use mailbox classes to

- adjust mailbox storage capacity for a user group
- adjust dialing restrictions and permissions for user groups

Mailbox Classes versus Class of Service (COS) on the switch

Do not confuse the CallPilot mailbox class feature with Class of Service on the switch. Class of Service on the switch applies certain dialing restrictions to lines, sets, or trunks, not to CallPilot features.

Ready-to-use mailbox classes

CallPilot provides mailbox classes that correspond to the supplied user creation templates. For example, the Basic User mailbox class is assigned to the Basic User Template.

The ready-to-use mailbox classes are organized into the following groups:

Mailbox class	Description
Regular Users	Satisfies the common requirements of most users in a typical office. Note: If you create a new mailbox class, the default values are the same as the original Regular Users class.
Executive Users	Supports executives and other users who require large storage space and message backups, and advanced messaging features.

Mailbox class	Description
Assistants	Supports administrative assistants who require moderate storage space and backups, and the ability to circulate messages on behalf of executive users.
Basic Users	Supports infrequent users of messaging features.
Fax Buffering Mailbox	Intended exclusively for fax machines that require buffers that have a maximum storage of new messages but also minimum retention time of messages.
Administrator	Supports system administrators who assess the status of other users on the system.

Default mailbox class dialing restrictions and permissions

By default, the Local restriction/permission list (RPL) is assigned to all supplied mailbox classes. To let a user group dial long distance, or to restrict a user group to on-switch dialing, assign a different (already customized) RPL to the mailbox class that is assigned to the user group.

See also

- [“Customizing supplied RPLs” on page 75](#)
- [“Overview of User Creation Templates” on page 92](#)

Configuring mailbox storage capacity

Introduction

If a particular group of users requires additional capabilities, you do not have to change each individual user, just the mailbox class. Each user assigned to that mailbox class automatically acquires the changes.

Access requirements

You must belong to an access class that grants Edit access to Mailbox Classes.

Getting there CallPilot System > User Administration > Mailbox Classes > Mailbox tab

The screenshot shows a dialog box titled "Basic User - Mailbox Classes Properties" with a "Mailbox" tab selected. The "Name" field contains "Basic User" and the "Comment" field also contains "Basic User". Under the "Storage" section, the "Voice storage limit" is set to 3 minutes. There are three checked options: "Delete read messages (voice)" after 5 days, "Delete read messages (fax)" after 5 days, and "Revert DN set by telset". There are two unchecked options: "Block call answering when mailbox is full" and "Retain copy of sent messages". The "Max composed message length" is set to 3:00 mm:ss, and the "Max call answering message length" is set to 2:00 mm:ss. The "Language for callers" is set to "system primary". At the bottom are buttons for "Save", "Cancel", "Print", and "Help".

To define storage limits and rules

- 1 In the Voice storage limit box, type the total number of voice message minutes that users can store.

Note: You can specify the limit in minutes, pages, or multiples of 10 Kbytes.

- 2 To force the system to delete old voice messages, ensure there is a check mark in the Delete read messages (voice) box.
- 3 In the associated after ____ days box, type the number of days that the system keeps read voice messages before deleting them.
- 4 To force the system to delete old fax messages, ensure there is a check mark in the Delete read messages (fax) box.
- 5 In the associated after ____ days box, type the number of days that the system keeps read fax messages before deleting them.
- 6 To prevent a caller from leaving a message when a mailbox is full, ensure there is a check mark in the Block call answering when mailbox is full box.
Note: This does not block system-generated messages, such as system delivery notification and alarms or broadcast messages.
- 7 To keep a copy of a composed and successfully sent message after completing a messaging session, ensure there is a check mark in the Retain copy of sent messages box.
- 8 To let users define the DN to which callers will be forwarded when they press 0 during a call answering session, ensure there is a check mark in the Revert DN set by telset box.

To define the maximum message lengths

- 1 In the Max composed message length box, select the longest length (in minutes and seconds) for a message that mailbox users can compose and send.
- 2 In the Max call answering message length box, select the longest length (in minutes and seconds) for a message that callers can leave during a Call Answering session.

Note: The Voice Storage Limit time must be greater than the Maximum Composed Message Length and the Maximum Call Answering Message Length.

Configuring dialing restrictions and permissions

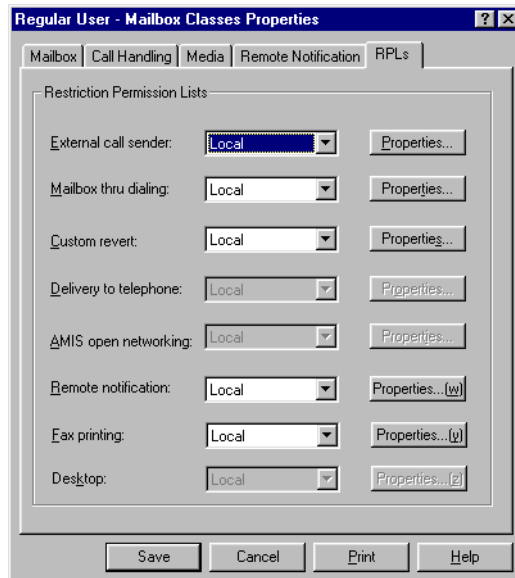
Introduction

By default, the Local RPL is assigned to all supplied mailbox classes. To let a user group dial long distance, assign a different (already customized) RPL to the mailbox class that is assigned to the user group.

Access requirements

You must belong to an access class that grants Edit access to Mailbox Classes.

Getting there CallPilot System > User Administration > Mailbox Classes > RPLs tab



To allow a user group to make long distance calls

- 1** In the Mailbox thru-dialing list, select either Long Distance 1 or Long Distance 2, depending on how you have customized those RPLs.
- 2** When you finish configuring the mailbox class, click Save.

Chapter 11

Creating and maintaining shared distribution lists

In this chapter

Guidelines for creating an SDL	118
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Modifying an existing SDL	123
Deleting an SDL	127
Documenting an SDL	128

Guidelines for creating an SDL

Introduction

SDLs allow users to send messages to a group of mailbox users. There are some storage capacity restrictions based on the number of members on the list and the size of the distributed message.

Impact of Networking on SDLs

To include a remote user site in an SDL, you must define the site and location in your messaging network, and have Networking installed.

To include users at remote sites in a CallPilot network, you must define them as remote voice users in the local database. The following types of numbers do not have mailboxes associated with them and, therefore, cannot be included in an SDL:

- remote notification (RN) targets
- nonusers who require Delivery to Telephone (DTT)

Restrictions on distribution lists

The following restrictions are placed on distribution list numbers:

- An SDL cannot be assigned a number 1–99. These numbers are reserved for PDLs.
- Each SDL must have a unique distribution list number.
- An SDL number must not conflict with any dialing plan prefixes or codes.
- An SDL number cannot be the same as any mailbox number, including the broadcast mailbox number. The default broadcast mailbox number is 5555.
- An SDL number cannot be the same as a directory entry user's DN. If an SDL number and a directory entry user number are the same, the SDL number takes priority when a list is created.
- An SDL cannot be nested inside another SDL.

Number of addresses

A single message can be sent to 500 addresses.

Note: Each SDL is one address, regardless of the number of entries on the list. Each entry on a PDL is one address. Therefore, an SDL with ten entries is one address, while a PDL with ten entries is ten addresses.

Dealing with multimedia messages

Users can send multimedia messages with an SDL. Users can assume that internal numbers all have voice- and fax-receiving capabilities.

However, you cannot assume that external numbers can receive multimedia messages. Create an SDL of external phone numbers for voice messages and a second SDL of external fax numbers.

See also

- information about address capabilities and distribution lists in the *Desktop Messaging Installation and Configuration Guide*

Configuring SDLs

Introduction

CallPilot users can address a voice, fax, or multimedia message to multiple recipients.

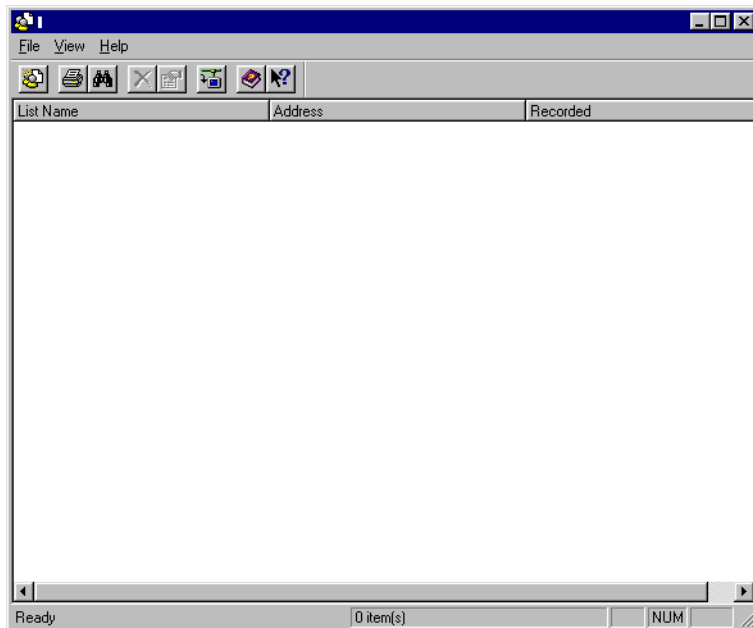
Access requirements

To create a new SDL, you must belong to an access class that grants Create/delete access to Shared Distribution Lists.

See also

- [“Guidelines for creating an SDL” on page 118](#)

Getting there CallPilot System > User Administration > Shared Distribution Lists



To create and configure an SDL

- 1 To create and label the new SDL, follow these procedures.
 - a. [“To create and label the SDL” on page 121](#)
 - b. [“To record a spoken name for the SDL” on page 122](#)
- 2 To add users to the SDL, choose from the following methods:
 - [“To generate a list of users to add \(in whole or in part\)” on page 124](#)
 - [“To add a local user whose Callback DN or mailbox number is known” on page 125](#)
 - [“To create a remote user and add him or her to the SDL” on page 126](#)
 - [“To create a directory entry and add it to the SDL” on page 126](#)

To create and label the SDL

- 1 From the File menu, select New.

Result: The Properties dialog box appears.

The screenshot shows the 'New SDL Properties' dialog box. It has a title bar with a question mark and a close button. The dialog is divided into several sections. At the top, there are three text input fields: 'List Name:', 'Address:', and 'Comments:'. To the right of the 'Address:' field are two buttons: 'Record...' and 'Import...'. Below these fields is a 'Search Users...' button. The main area of the dialog is divided into two large list boxes. The left list box is titled 'Users to add:' and the right list box is titled 'Distribution list contents:'. Both list boxes have column headers: 'Last na...', 'First na...', 'Mailbox', and 'Calbac...'. Between the two list boxes are four buttons: 'Add >', 'Add all >>', '< Remove', and 'Add user...'. Below the right list box are two buttons: 'New remote user...' and 'New directory entry user...'. At the bottom of the dialog are four buttons: 'Save', 'Cancel', 'Print', and 'Help'.

- 2 In the Name box, type a unique name for the SDL.
- 3 In the Address box, type the unique access number for the SDL.
- 4 In the Comments box, type an optional description of the SDL.

To record a spoken name for the SDL

- 1 Click Record.

Result: The Specify Phoneset dialog box appears.



- 2 In the Enter a phone number box, type the phone number of the phoneset you want to use for recording.
- 3 Answer the phoneset when it rings.

Result: The Voice Recorder dialog box appears.



- 4 Click Record.
- 5 Speak an appropriate name for the distribution list into the phoneset.
- 6 Click Stop to stop the recording.
- 7 To listen to the recorded title, click Play.
- 8 When you are satisfied with the recorded title, click Done.

Modifying an existing SDL

Introduction

The procedure to add users to an existing SDL depends on both the type of user and the method you will use to add the user.

Adding a user by using the callback DN or mailbox number

You can add a user who is not in the list of users to the SDL if you know that user's mailbox number or callback DN. This option is useful if you generate a list of users with the search mechanism, and you then wish to include additional users who were not included in the generated list but who should be in the SDL.

Requirement

You must belong to an access class that grants Edit access to Shared Distribution Lists.

Creating a CallPilot Remote User or directory entry to add to the SDL

If you want to add a CallPilot Remote User (a user at another networking location) to the SDL, but that user has not yet been added to the database as a remote user, you can do both at the same time.

If you want to add a directory entry user to the SDL, but that user has not yet been added to the database, you can do both at the same time.

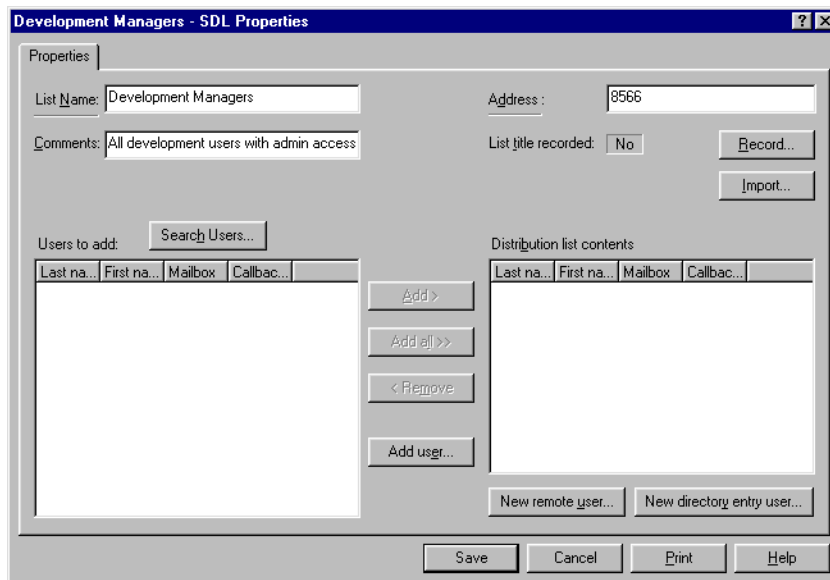
Note: Although a directory entry has no mailbox, it receives a message from the SDL in the same way as the Delivery to Telephone message is received by phone numbers that are not on the system.

Access requirements

You must belong to an access class that grants

- View or Edit access to User Creation Templates
- Create/delete or Create/delete mailbox users only access to Users
- Edit access to Shared Distribution Lists

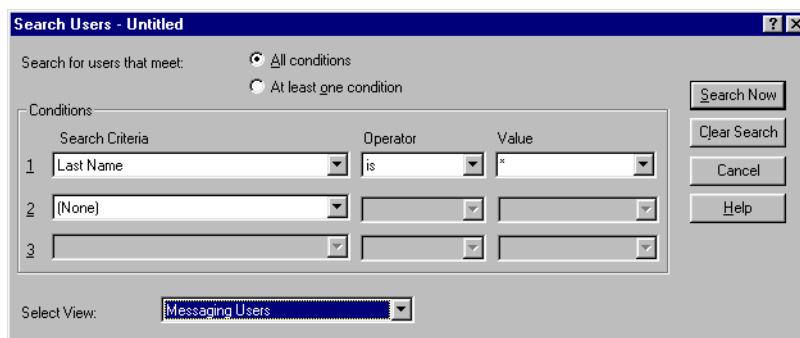
Getting there CallPilot System > User Administration > Shared Distribution Lists > SDL Properties sheet



To generate a list of users to add (in whole or in part)

- 1 Click Search Users.

Result: The Search Users dialog box appears.



- 2** Enter the search criteria and run the search.
- 3** For each local user mailbox you want to add to the SDL:
 - a.** In the Users to add box, click the user name.
 - b.** Click Add.

- 4 To add all the users from the generated list to the SDL, Click Add all.
- 5 For each user that you want to delete from the SDL:
 - a. In the Distribution list contents box, click the user name.
 - b. Click Remove.
- 6 When the distribution list is completed, click Save.

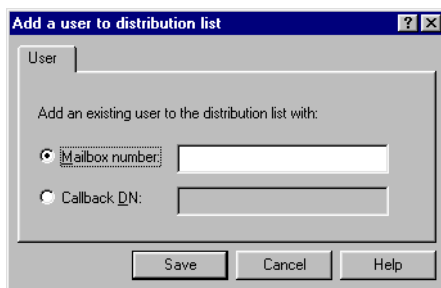
See also

- “Specifying criteria and performing a search” on page 134

To add a local user whose Callback DN or mailbox number is known

- 1 Click Add user.

Result: The Add a user to distribution list dialog box appears.



- 2 If you know the user's mailbox number, click the Mailbox number button, and type the number into the box beside it.
- 3 If you know the user's Callback DN, click the Callback DN button, and type the DN into the box beside it.
- 4 Click Save to add the user, and return to the Properties tab.

To create a remote user and add him or her to the SDL

- 1 Click the New remote user button for the selected user to appear in the Distribution list contents box.
- 2 In the First name box, type a first name for the user.
- 3 In the Last name box, type a last name for the user.
- 4 To include extra information to identify the remote user more easily when administering the system, in the Comments box, type the information.
- 5 In the Department box, type the name of the user's department.
- 6 In the Title box, type the user's business title.
- 7 To configure the mailbox settings for this remote user, follow the procedure in ["To create a directory entry and add it to the SDL"](#) below.

To create a directory entry and add it to the SDL

Note: Both the first name and last name are required.

- 1 Click New directory entry.
- 2 In the First name box, type a descriptive name that identifies the phoneset's users or its location (for example, Technical Services).
- 3 In the Last name box, type a descriptive name that identifies the phoneset's users or its location (for example, Boardroom).
- 4 Type any extra information in the Comments box.
- 5 To configure the settings for the new directory entry user, follow the procedure ["To define mailbox settings for a directory entry" on page 186](#).

Deleting an SDL

Introduction

Delete an SDL that you no longer need.

Access requirement

You must belong to an access class that grants Create/delete access to Shared Distribution Lists.

Getting there CallPilot System > User Administration > Shared Distribution Lists

To delete an SDL

- 1 Select an existing distribution list.
- 2 On the File menu, select Delete.

Result: A dialog box appears, asking you to confirm the deletion.

- 3 Click Yes to delete the list.

Documenting an SDL

Introduction

Print the contents of an SDL when you want a hard copy of all the settings. You can also print a list of all the SDLs on the system.

Getting there CallPilot System > User Administration > Shared Distribution Lists

To print a list of all SDLs

- 1 Ensure that no individual SDL is highlighted.
- 2 On the File menu, select Print.
Result: The Windows Print box appears.
- 3 Make any necessary adjustments to the print setup and click OK.

To print the contents of an SDL

- 1 Select an SDL.
- 2 On the File menu, select Properties.
Result: The Windows Print box appears.
- 3 Make any necessary adjustments to the print setup and click OK.

Part 2

Frequently performed administrative tasks

In this part

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Chapter 13: Enabling and disabling mailbox access privileges	141
Chapter 14: Moving a user to a different user group	153
Chapter 15: Adding and deleting users and directory entries	161

Chapter 12

Searching for users

In this chapter

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Specifying criteria and performing a search	134
Modifying and reusing your latest user search	137
Saving a user search	138
Using a saved user search	139
Deleting a saved user search	140

Overview

Introduction

You can use the CallPilot User Search feature to create, save, and reuse sets of criteria.

Saved user searches

Your set of saved user searches includes some that are supplied with your CallPilot system. Supplied user searches include All Users, Password Expired, Locked Out, and Remote Users.

Wildcards

Use wildcards in the value statement when

- you are searching for a range
For example, if you are interested in all users with last names beginning with the letter S, select Last Name from the Search Criteria list and type S* in the Value box.
- you are searching for user last names you are not sure how to spell
For example, if you know the user's last name begins with Sm, then type Sm* in the value box. The search produces a sublist of users with last names that begin with Sm (for example, Smilla, Smith, Smothers, Smythe).

Placeholders

A placeholder is a special character that represents any single character. The CallPilot placeholder character is the question mark (?). If you include a question mark in your value statement, the search function might find more matching records than without the question mark. For example, if you type "J??n" in the value box with the search criteria set to First Name, the search will produce a sublist of users with the first names John and Joan. However, it will not include Johann, because this name has too many letters.

Common user searches

The following are examples of common searches:

Search criteria	Result
Last Name is Smith	Retrieves a sublist of all users named Smith
Last Name is Sm*	Retrieves a sublist of all users with last names beginning with Sm
Title is Manager	Retrieves a sublist of all users who are managers
Title is NOT Manager	Retrieves a sublist of all users who are not managers
Department = Human Resources	Retrieves a sublist of all users who are members of the Human Resources department
Password retry count > 1	Retrieves a sublist of all users who entered an incorrect user ID and password more than once

See also

- [“Specifying criteria and performing a search” on page 134](#)
- [“Modifying and reusing your latest user search” on page 137](#)
- [“Saving a user search” on page 138](#)
- [“Using a saved user search” on page 139](#)
- [“Deleting a saved user search” on page 140](#)

Specifying criteria and performing a search

Introduction

The Search Users window lets you specify up to three search criteria that are based on the information stored in the CallPilot system.

Broadening a user search

If you cannot find the user(s) you are looking for, you can widen the scope of your search. A wider search increases the number of matches your search produces.

Example

In your system, some users are Shift Managers. Some users are Department Managers. You know that your target user is one or the other.

To view a list that contains both types of managers, search for User Title = Shift Manager OR User Title = Department Manager.

Restricting a user search

Your first search might bring back too many users that match your criteria. To reduce the number of matches found in a search, reduce the scope of your search.

Example

There are 30 users named Smith in your system. The Smith you need to find is a manager.

To find the manager named Smith, search for Last Name = Smith AND Title = manager.

Access requirements

To create and execute a user search, you must belong to an access class that grants View access to Users.

Getting there CallPilot System > User Administration > Users > Search Users

To create the search

- 1 Beside Search for users that meet, click a button to choose the type of search.
 - All conditions means that only users who meet all the conditions set in your search will be included in the search results.
 - At least one condition means that a user only needs to meet one of the conditions set in your search to be included in the search results.
- 2 From the Search Criteria list, select the search criteria.
- 3 From the Operator list, select an appropriate operator.
- 4 From the Values list, enter or select an appropriate value.

Note: Based on the search criteria you select, you can enter a value in the Value box or select from a list of values generated by the Value box.

- 5 From the Select View list, select an appropriate view.

Note: The view determines the user information that is listed when a user search is completed. The General view shows general information about the user (for example, his or her title, department, and name). The Administrative view shows the user's administrative capabilities (for example, his or her password retry count and access class). The Messaging view shows the user's mailbox capabilities (for example, mailbox class or the Target Number for a paging device).

To broaden the search

- 1 Click At least one Condition. This means that a user only needs to meet one of the conditions set in your search to be included in the search results.
- 2 In the second row, fill in the Search Criteria, Operator, and Value fields to add a second condition for your search.
- 3 If desired, fill in the fields of the third row to add a third condition for your search.
- 4 From the Select View list, select an appropriate view.

To restrict the search

- 1 Click All conditions. This means that only users who meet all the conditions set in your search will be included in the search results.
- 2 Review your search criteria to ensure that none of the conditions conflict with one another.
- 3 From the Select View list, select an appropriate view.

To perform the search

Click Search Now.

Result: The Users window appears, showing the results of the user search.

Modifying and reusing your latest user search

Introduction

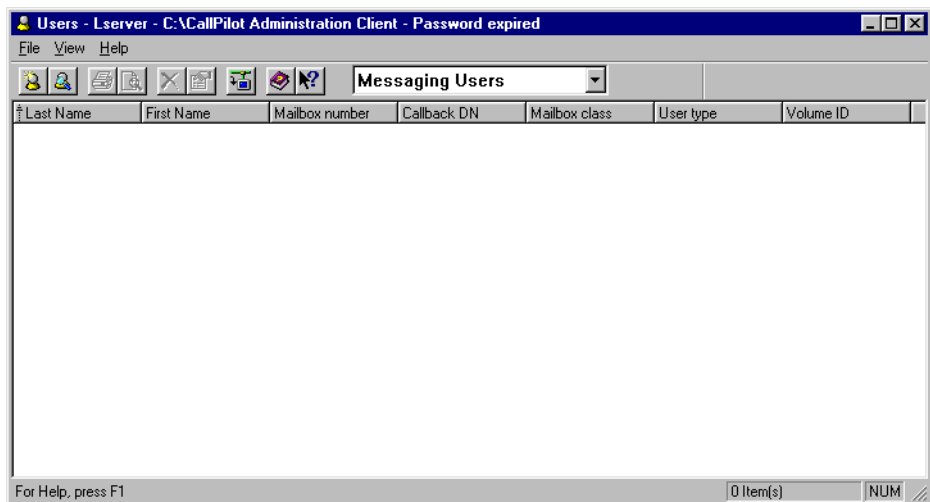
If you want to modify the search (for example, widen or narrow the scope), you can retrieve your most recent search criteria settings using the Open Search menu command.

You must have already specified at least one set of search conditions and run one search. If you have not, see [“Specifying criteria and performing a search” on page 134](#).

Access requirements

To retrieve your latest search, you must belong to an access class that grants View access to Users.

Getting there CallPilot System > User Administration > Users



To retrieve your latest user search

On the File menu, click Open Search.

Saving a user search

Introduction

If you search for a specific group of users regularly, save the search criteria for reuse.

Access requirements

To save user search criteria for reuse, you must belong to an access class that grants Create/delete access to Saved User Searches.

Getting there CallPilot System > User Administration > Users > Search Users

Conditions	Search Criteria	Operator	Value
1	Last Name	is	" "
2	(None)		
3			

To save a user search

- 1 Specify your search criteria (see [“To create the search” on page 135](#)).
- 2 Click Save Search.
- 3 In the Name box, type a name for the search.
- 4 Click OK.

See also

- [“To create the search” on page 135](#)
- [“Using a saved user search” on page 139](#)

Using a saved user search

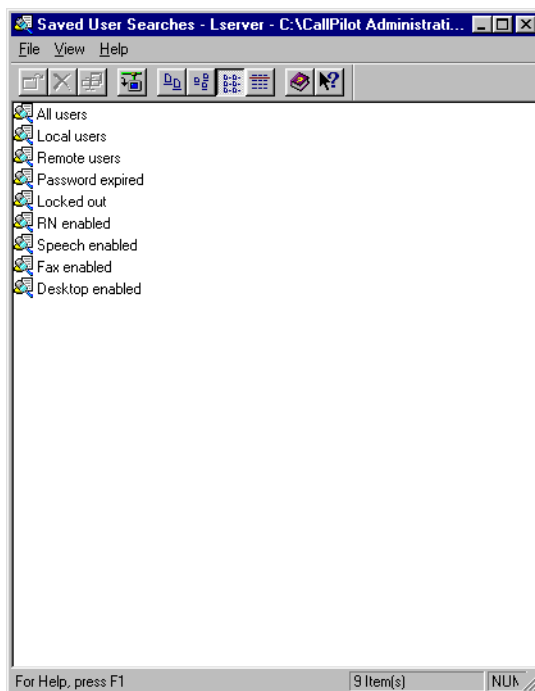
Introduction

You can run a saved user search as is, but you cannot modify it before you run it.

Access requirements

To run a saved user search, you must belong to an access class that grants View access to Saved User Searches.

Getting there CallPilot System > User Administration > Saved User Searches



To run a saved user search

Double-click the name of the saved search you want to run.

Result: The Users window appears, displaying the results of your search.

Deleting a saved user search

Introduction

If the criteria specified in the saved search become obsolete, you can remove the search from the system.

Access requirements

To delete a saved user search, you must belong to an access class that grants Create/delete access to Saved User Searches.

Getting there CallPilot System > User Administration > Saved User Searches

To delete a saved user search

- 1 Click the saved search you want to delete.
- 2 On the File menu, click Delete.
Result: A confirmation dialog box appears, asking you to confirm the deletion.
- 3 Click Yes.

Chapter 13

Enabling and disabling mailbox access privileges

In this chapter

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Resetting a user's mailbox password	144
Enabling or disabling Autologon to a mailbox	146
Disabling and restoring a user's access to administrative programs	148
Resetting a user's administrative password	150

Overview

Introduction

Administrators are often asked to help users who are having problems or have been locked out of their mailboxes.

Common user problems include

- forgotten passwords
- expired passwords
- mailbox lockout after too many failed logon attempts
- difficulty using the phoneset interface to configure features such as mailbox Autologon

Some users might have some administrative capabilities. This chapter provides information for helping mailbox users and administrative program users.

See also

- [“Connecting to a CallPilot server” on page 34](#)
- [Chapter 12, “Searching for users”](#)
- information about maintaining CallPilot security in *Monitoring and Security for the Administrator*

Reenabling a disabled mailbox

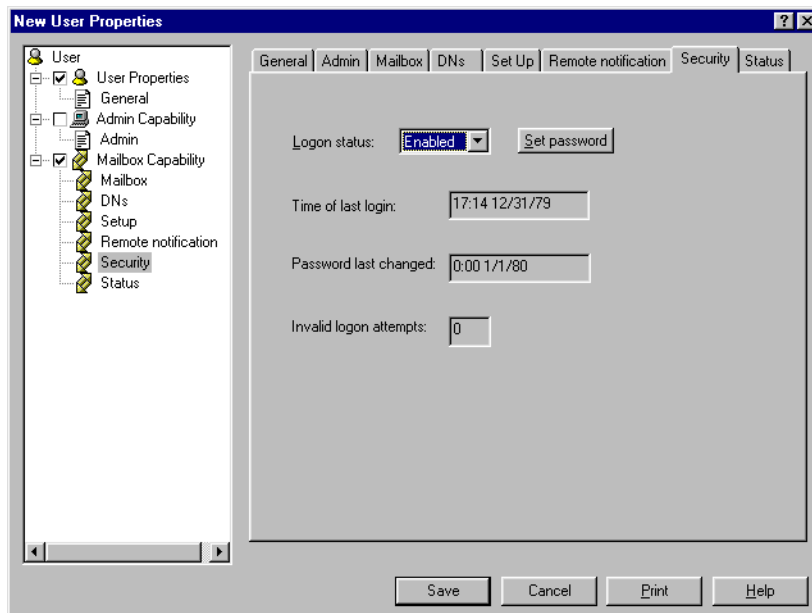
Introduction

A mailbox is automatically disabled when it has been unused long enough to be disabled by the system or there are too many consecutive invalid login attempts.

Access requirements

You must belong to an access class that grants Edit or Edit (mailbox users only) access to Users.

Getting there CallPilot System > User Administration > Users > Search Users > Security tab



To reenable a user mailbox

- 1 Select Enabled from the Logon Status box.
- 2 Click Save.

Resetting a user's mailbox password

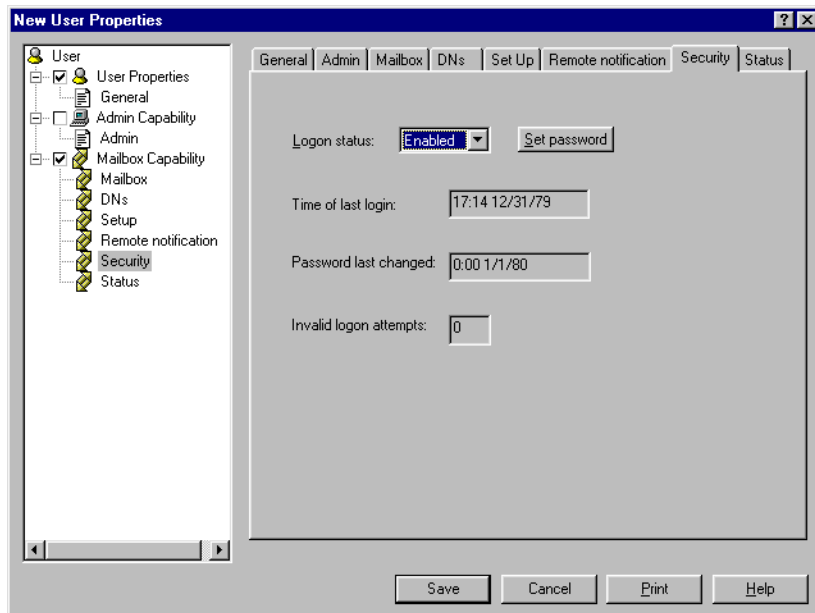
Introduction

Use this procedure when a user forgets his or her password.

Access requirements

You must belong to an access class that grants Edit or Edit (mailbox users only) access to Users.

Getting there CallPilot System > User Administration > Users > Search Users > Security tab



To reset the password for a user mailbox

Requirement: You must enter the password as digits (for example, "PASSWORD" = 72779673).

- 1 Click Set password.
- 2 In the Set password box, type the default password, then type it again in the Confirm password box.
- 3 Click Save.

Enabling or disabling Autologon to a mailbox

Introduction

When Autologon is enabled by the mailbox user, it allows a caller to automatically log on to the mailbox from a DN associated with the mailbox.

An administrator enables and disables Autologon DNs

To allow the user to enable and disable Autologon to his or her mailbox, use the procedure [“To enable or disable Autologon DNs for a user mailbox” on page 147](#).

The user enables and disables Autologon from a phoneset

For a user to enable or disable Autologon to his or her mailbox, the user must be logged on to the mailbox. The user presses 8–0 for mailbox options, and then presses 4 for Autologon. The user can then press 1 to enable Autologon, or press 2 to disable Autologon.

If no DNs are AutoLogon-enabled in the user’s profile, the user cannot enable Autologon from a phoneset.

Security feature

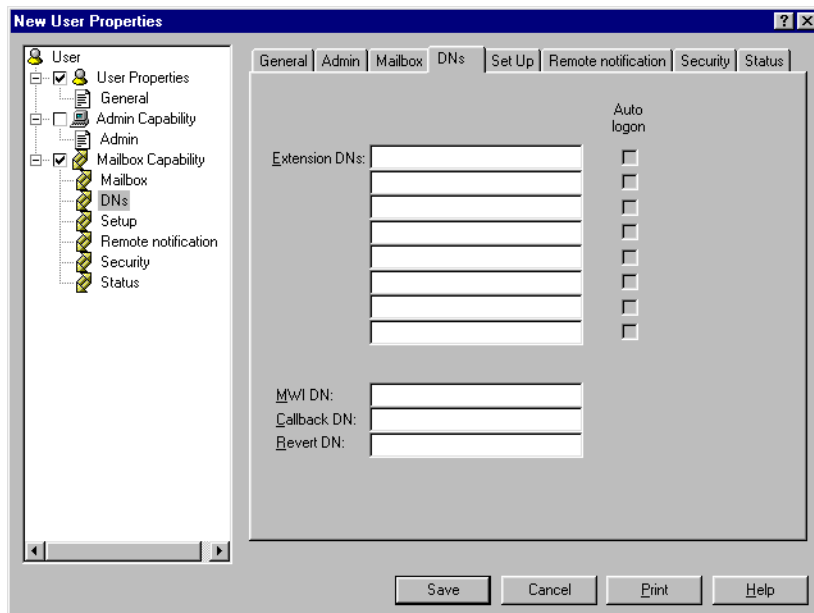
To prevent unauthorized access to a mailbox, CallPilot disables Autologon for all DNs whenever an associated DN is added to the user’s DNs list. The enabled DNs remain enabled in the user’s profile, but the user must reenable Autologon from the phoneset.

Note: If a user complains that Autologon is not working when it has been enabled, check for recent changes to the DN list for that user.

Access requirements

You must belong to an access class that grants Edit or Edit (mailbox users only) access to Users.

Getting there CallPilot System > User Administration > Users > Search Users > DNs tab



To enable or disable Autologon DNs for a user mailbox

- 1 To enable Autologon for an associated DN, ensure there is a check mark in the corresponding Autologon allowed check box.
- 2 To disable Autologon for an associated DN, ensure the corresponding Autologon allowed check box is clear.
- 3 When you finish configuring user properties, click Save.

Disabling and restoring a user's access to administrative programs

Introduction

If a user with access to administrative programs fails three times to enter the correct user ID and password, he or she is locked out of the CallPilot system window.

Note: An administrative user can also be locked out by an administrator with adequate permissions. Only a user with adequate administrative permissions can restore access to a user who has been locked out.

Access requirements

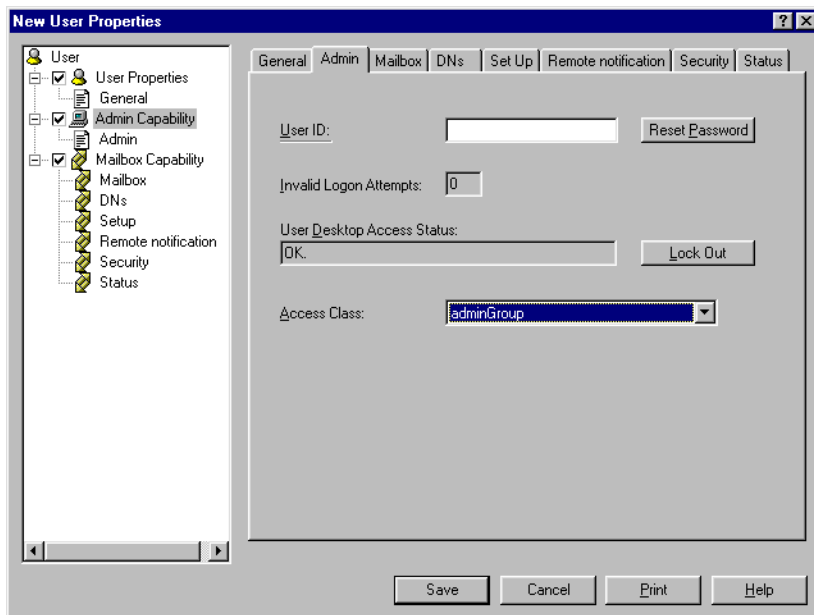
You must belong to an access class that grants Edit or Edit (mailbox users only) access to Users.

See also

- [“Resetting a user's administrative password” on page 150](#)
- [“Changing access to administrative programs” on page 159](#)

Getting there

CallPilot System > User Administration > Users > Search Users > Admin tab



To cancel administrative capability for a user

- 1 In the tree structure, clear the check box beside Admin Capability.
- 2 Click Save.

To restore a user's desktop access

- 1 Click Restore.
Result: The Restore label changes to Lockout.
- 2 Click Save.

Resetting a user's administrative password

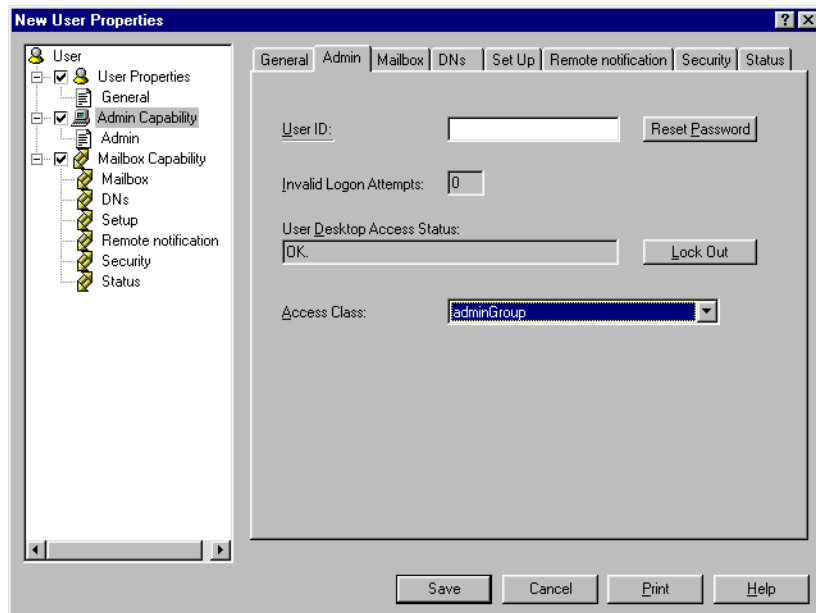
Introduction

If a user forgets his or her system password, you can reset it to the default.

Access requirements

You must belong to an access class that grants Edit or Edit (mailbox users only) access to Users.

Getting there CallPilot System > User Administration > Users > Search Users > Admin tab



To reset a user's password

- 1 Click Reset Password.

Result: A confirmation dialog box appears, displaying the new password and asking you to confirm the reset.

- 2 Click Yes.
- 3 Click Save.

Chapter 14

Moving a user to a different user group

In this chapter

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Overview

Introduction

When a user changes jobs, move him or her to the user group that has the capabilities required for the new job functions.

Mailbox classes and user creation templates

Each user creation template is associated with a mailbox class. For example, the Executive mailbox class includes additional messaging capabilities; it is the default user class for the Executive template.

Special scenarios

Typically, a user does not have to share a phoneset and is the only person with access to his or her mailbox. A change in job function can necessitate a change in this scenario. For example, if the user has new resources, such as an assistant, you might change the mailbox configuration of the user and the assistant.

Access to administrative programs

When a user changes jobs, his or her need for access to administrative programs can change.

See also

- [“Multiple CallPilot administrators” on page 80](#)
- [“Mailbox classes and user groups” on page 110](#)
- [“Customizing a mailbox for a typical user” on page 165](#)
- [“Customizing a mailbox for a specific scenario” on page 175](#)
- [“Configuring Remote Notification service” on page 250](#)

Changing a user's job title or department

Introduction

To support user searches on job title or department, complete the following tasks:

- Enter the information precisely as it is for others with that title or in that department.
- Follow naming conventions that facilitate the use of wildcards and placeholders.

Access requirements

You must belong to an access class that grants Edit or Edit (mailbox users only) access to Users.

Getting there CallPilot System > User Administration > Users > Search Users > User Properties > General tab

The screenshot shows a Windows-style dialog box titled "stasha tepic - User Properties". On the left is a tree view with the following items: "User" (expanded), "User Properties" (checked), "General" (selected), "Admin Capability" (unchecked), "Admin" (unchecked), "Mailbox Capability" (checked), "Mailbox" (unchecked), "DNs" (unchecked), "Setup" (unchecked), "Remote notification" (unchecked), "Security" (unchecked), and "Status" (unchecked). The main area of the dialog has several tabs: "General", "Admin", "Mailbox", "DNs", "Set Up", "Remote notification", "Security", and "Status". The "General" tab is active and contains the following fields: "First name:" with the text "stasha", "Initial(s):" (empty), "Last name:" with the text "tepic", "Comments:" (a large text area), "Title:" with a blue button labeled "New title", and "Department:" (empty). At the bottom of the dialog are four buttons: "Save", "Cancel", "Print", and "Help".

To change a user's job information

- 1** In the Title box, type the user's new job title.
- 2** In the Department box, type the user's new department.
- 3** When you finish modifying user properties, click Save.

Changing a user's mailbox class

Introduction

To have mailbox capabilities required for a certain job, a user must have a mailbox belonging to the mailbox class that provides the required capabilities.

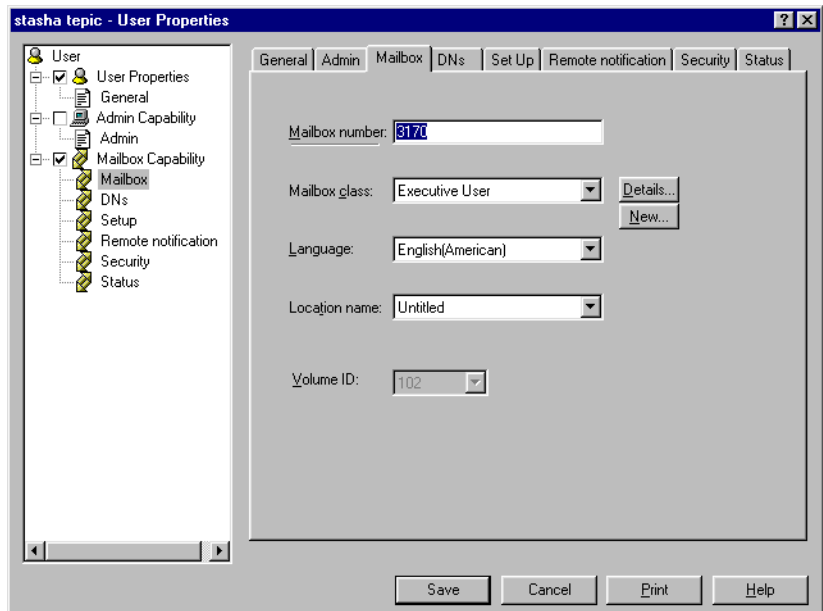
Mailbox classes determine these aspects for the user group:

- mailbox storage capacity
- dialing restrictions and permissions

Access requirements

You must belong to an access class that grants Edit or Edit (mailbox users only) access to Users.

Getting there CallPilot System > User Administration > Users > Search Users > User Properties > Mailbox tab



To change the mailbox class

- 1** In the Mailbox class list, select the mailbox class used by other users with job functions similar to those of the user.
- 2** When you finish modifying user properties, click Save.

Changing access to administrative programs

Introduction

If a user who is also an administrator changes his or her position within your company, you might need to modify his or her access class. You can also grant or cancel administrative access for an existing user through this procedure.

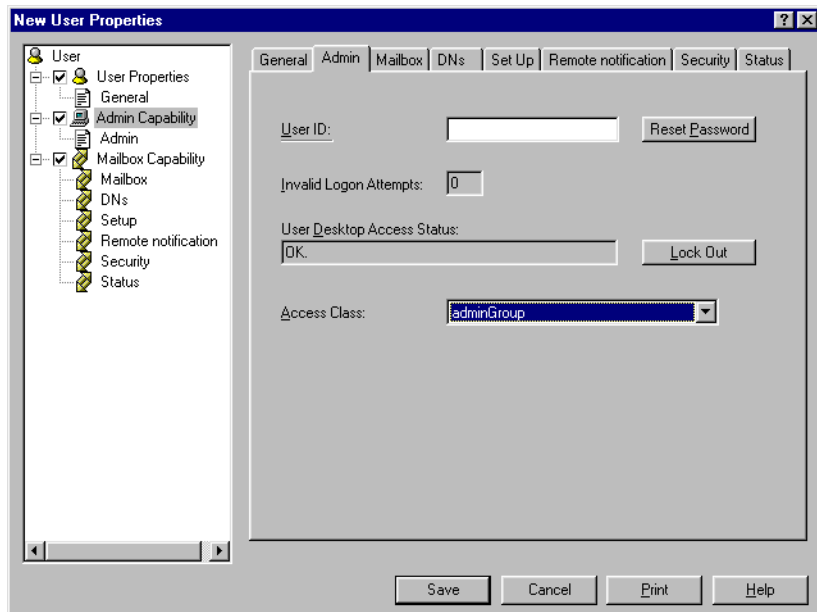
Example

When a manager changes departments he or she performs system maintenance instead of managing users in the system. Change the access class.

Access requirements

You must belong to an access class that grants Edit or Edit (mailbox users only) access to Users.

Getting there CallPilot System > User Administration > Users > Search Users > Admin tab



To give administrative capability to a user

- 1 Click the Admin tab.
- 2 On the left side of the sheet, click the check box beside Admin Capability in the file tree.
- 3 From the Access Class list, select the user's administrative access class.
- 4 When you finish modifying user properties, click Save.

To change a user's administrative access class

- 1 From the Access Class list, select the new access class.
- 2 When you finish modifying user properties, click Save.

To cancel administrative capability for a user

- 1 On the left side of the sheet, clear the check box beside Admin Capability in the file tree.
- 2 When you finish modifying user properties, click Save.

Chapter 15

Adding and deleting users and directory entries

In this chapter

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<u>Customizing a mailbox for a typical user</u>	<u>165</u>
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<u>Providing a spoken name for a user or directory entry</u>	<u>191</u>
<u>Deleting a user or directory entry</u>	<u>193</u>

Adding an individual mailbox user

Introduction

Before adding a mailbox to the system, you must have an appropriate user template. Either create a user template or use an existing template.

Based on the type of user you are creating (local, directory entry, or CallPilot Remote User), use one of the following procedures:

- [“To add a local user to the CallPilot system” on page 164](#)
- [“Adding a directory entry” on page 185](#)
- [“Adding a CallPilot user at a remote site to the local system” on page 187](#)

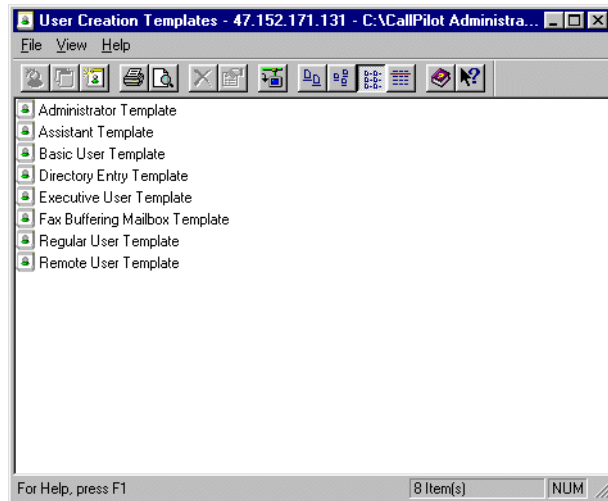
Access requirements

To add a user to the system, you must belong to an access class that grants Create/delete or Create/delete (mailbox users only) access to Users.

See also

- [Chapter 9, “Adding a mailbox user group”](#) (for more information on templates)

Getting there CallPilot System > User Administration > User Creation Templates



To add a local user to the CallPilot system

- 1 Select a template that has capabilities that are appropriate to the user type.
- 2 On the File menu, click Add New User.

The screenshot shows the 'New User Properties' dialog box. On the left is a tree view under 'User' containing 'User Properties' (checked), 'General', 'Admin Capability', 'Admin', 'Mailbox Capability' (checked), 'Mailbox', 'DNs', 'Setup', 'Remote notification', 'Security', and 'Status'. The right pane displays the 'General' tab with input fields for 'First name:', 'Initial(s):', 'Last name:', 'Comments:' (a large text area), 'Title:', and 'Department:'. At the bottom are 'Save', 'Cancel', 'Print', and 'Help' buttons.

- 3 In the First name box, type the user's first name. In the Last name box, type the user's last name.
- 4 In the Comments box, type any additional information about the user.
- 5 Verify the user's mailbox capabilities, and make changes where required.
- 6 When you finish entering information, click Save.

Customizing a mailbox for a typical user

Introduction

The user template provides default values for mailbox features. Once you have created an individual user, you can modify most of the defaults for the user. Employ one or more of the following procedures:

- [“To open the User Properties sheet for an existing user” on page 167](#)
- [“To view or print the status of the user mailbox” on page 169](#)
- [“To modify mailbox capabilities for the user” on page 170](#)
- [“To define the DNs associated with the user mailbox” on page 171](#)
- [“To specify the user’s RN information” on page 173](#)

Relationship between mailbox number and DNs

A mailbox number can be associated with any or all of the following items:

- up to eight extension DNs
- an MWI DN
- a Callback DN (for Call Sender and Name Dialing purposes)
- a Revert DN

By default, the system assigns the user’s mailbox number to the

- user’s first extension DN
- MWI DN
- Callback DN

You can overwrite any or all of these defaults for a user group (template) or an individual user.

Typical mailbox configuration

Typically, a user has sole use of a phoneset, does not share the primary DN with another user, and has sole use of the mailbox. For this typical configuration, the mailbox number and the primary DN can be the same.

MWI DN dependencies

Success of the MWI DN configuration depends on switch configuration options that vary from one software version to another.

Note: If the MWI DN options that you configure do not work, refer to the *Installation and Configuration Guide* for your switch or *Hot Spare Procedures*.

See also

- [“Customizing a mailbox for a specific scenario” on page 175](#)
- information about CallPilot Web Messaging, message addressing, message playback, hardware requirements and associated software in the *Desktop Messaging Installation and Configuration Guide*

Before you begin

If you do not already have the New User Properties sheet open for the user, you must search for an existing user.

Access requirements

To view or print user properties, you must belong to an access class that grants View access to Users.

To edit properties, you must belong to an access class that grants Edit or Edit (mailbox users only) access to Users.

Getting there CallPilot System > User Administration > Users

Search Users - Untitled [?] [X]

Search for users that meet: ☒ All conditions ☐ At least one condition

	Search Criteria	Operator	Value
1	Last Name	is	*
2	(None)		
3			

Select View: Messaging Users

[Search Now] [Clear Search] [Cancel] [Help]

To open the User Properties sheet for an existing user

- 1 In the Search Users dialog box, enter the appropriate search criteria.

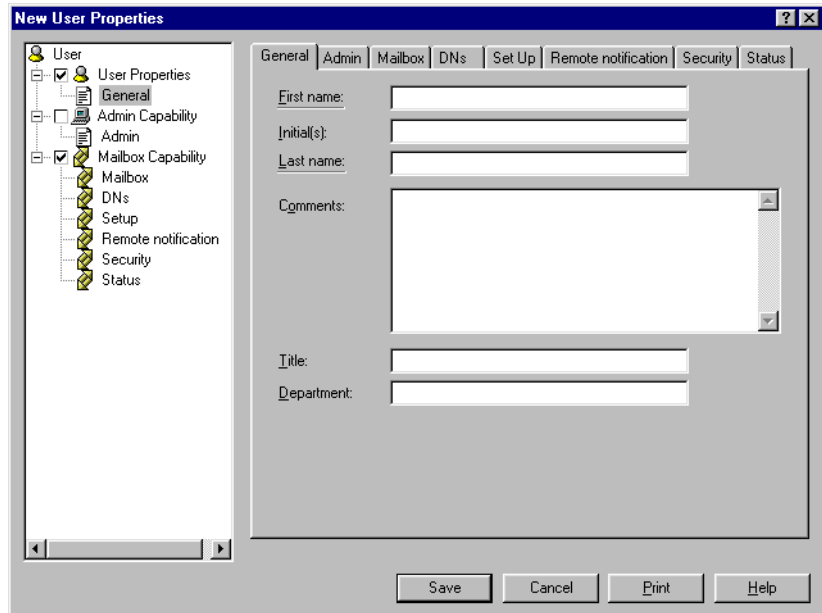
Note: For more detailed information about searching for a user or group of users, see the context-sensitive Help.

- 2 Click Search Now.

Result: A list of users that meet the search criteria appears.

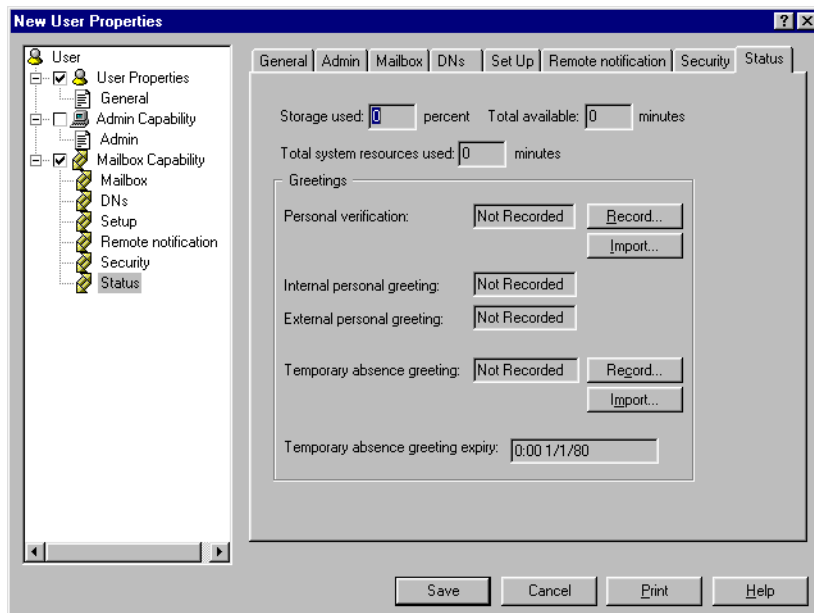
3 Double-click a user.

Result: A Properties sheet displays user information.



To view or print the status of the user mailbox

- 1 In the User Properties sheet, click the Status tab.



- 2 In the Storage used box, confirm the storage space used by messages in the user mailbox.
- 3 In the Total available box, confirm the storage space that remains for messages in the user mailbox.
- 4 In the Total system resources used box, confirm the storage space that is available to the user mailbox, which includes messages and all other individual greetings and personal distribution lists.
- 5 In the Personal verification box, see if a spoken name is associated with the user mailbox that identifies the mailbox.
- 6 In the Internal personal greeting box, see if there is a mailbox greeting that other local users hear.
- 7 In the External personal greeting box, see if there is a mailbox greeting that external callers hear.
- 8 In the Temporary absence greeting box, confirm that there is a temporary greeting for the user mailbox while the user is away from work for vacation, illness, travel, and so on. During normal working periods, no temporary absence greeting is in place.

- 9 In the Temporary absence greeting expiry box, confirm when the temporary mailbox greeting reverts to the regular mailbox greeting.
- 10 When you finish viewing the user's properties, click Save.

To modify mailbox capabilities for the user

- 1 In the New User Properties sheet, ensure the Mailbox Capabilities check box is checked, and that the Set Up tab is configured.
- 2 Click the Mailbox Tab.

The screenshot shows the 'New User Properties' dialog box with the 'Mailbox' tab selected. On the left, a tree view shows the hierarchy: User > User Properties > Mailbox (checked). The main area contains the following fields and controls:

- Mailbox number:** A text input field.
- Mailbox class:** A dropdown menu set to 'Regular User'. To its right are 'Details...' and 'New...' buttons.
- Language:** A dropdown menu set to 'English(American)'.
- Location name:** A dropdown menu set to 'Untitled'.
- Automatic distribution of mailboxes across volumes:** A checked checkbox.
- Volume ID:** A dropdown menu set to '1'.

At the bottom of the dialog are four buttons: 'Save', 'Cancel', 'Print', and 'Help'.

- 3 In the Mailbox number box, type the DN associated with the user's mailbox.
- 4 *For bilingual or multilingual systems:* In the Language box, select the user's preferred language.

Note: The user hears the primary language until after he or she logs on to the mailbox. If the assigned mailbox class is configured to allow callers to hear voice prompts in the user's preferred language, CallPilot uses this setting to determine the voice prompts used when callers reach a user's voice mailbox.

- 5 Configure DNs, using the procedure ["To define the DNs associated with the user mailbox" on page 171](#).

- 6 *For RN users:* Set up how and when a user receives Remote Notification, if the user has RN capability, using the procedure [“To specify the user’s RN information” on page 173](#).
Note: Remote Notification must be enabled by the user group’s mailbox class before you can define the way in which the user receives Remote Notification.
- 7 Record the user’s mailbox password or greetings if they do not exist, using the procedure [“To provide a personal verification message for the user” on page 174](#)
- 8 When you finish configuring the user’s properties, click Save.

To define the DNs associated with the user mailbox

Note: All DNs defined in CallPilot must be dialable from the switch connected to the CallPilot server. For more information, see the *NMS Implementation and Administration Guide* for Product Release 1.0.

Example: If the DN is for a DMS/Centrex phoneset, include the access code in the DN using the following format: <Centrex/DMS access code><10- or 7-digit Centrex/DMS DN>.

Note: For more information and examples, see [“Customizing a mailbox for a specific scenario” on page 175](#).

- 1 In the New User Properties sheet, click the DN's tab.

The screenshot shows the 'New User Properties' dialog box with the 'DN's' tab selected. The left pane shows a tree view with 'User' expanded, and 'DN's' selected under 'Mailbox Capability'. The right pane has tabs for 'General', 'Admin', 'Mailbox', 'DN's', 'Set Up', 'Remote notification', 'Security', and 'Status'. The 'DN's' tab contains the following fields:

- 'Extension DN's': A list of seven empty text boxes for entering extension numbers.
- 'Auto logon': A vertical column of seven checkboxes corresponding to the 'Extension DN's' boxes.
- 'MWI DN': A single text box for entering a Message Waiting Indicator number.
- 'Callback DN': A single text box for entering a callback number.
- 'Revert DN': A single text box for entering a revert number.

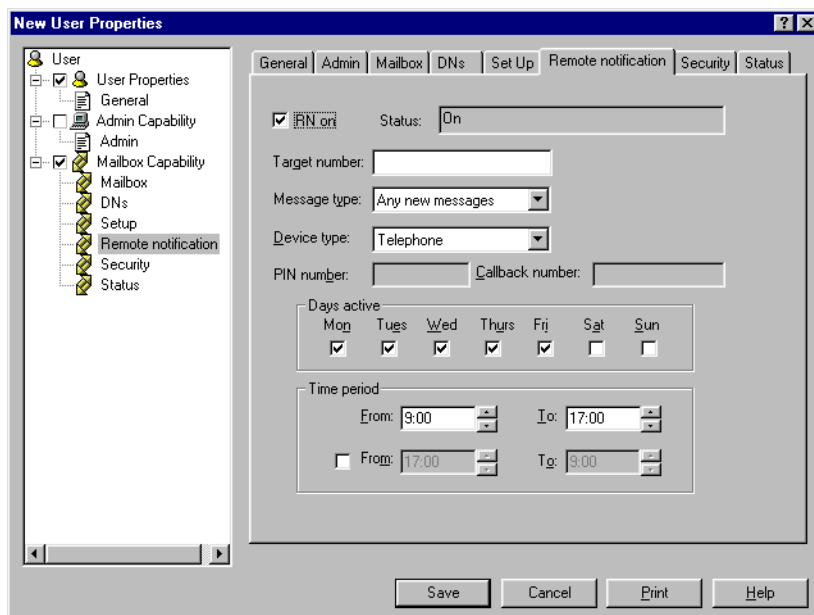
At the bottom of the dialog are buttons for 'Save', 'Cancel', 'Print', and 'Help'.

- 2 In the first Extension DN's box, type the primary telephone number of the user's mailbox.
Note: If the mailbox has no extension numbers, go to step 5.
- 3 If the user has other DN's that he or she normally uses, type those extension DN's.
Note: CallPilot answers any calls that these DN's do not answer.
- 4 To let users automatically log on to Messaging Administration without entering their mailbox number and password when calling from a defined extension DN, ensure the related Auto logon check box is checked.
- 5 To define a device that lets a user know that messages are in the mailbox, type a number in the MWI DN box.
- 6 To define a DN to which Call Sender can reach the user, type a number in the Callback DN box.
- 7 When you finish configuring the user's properties, click Save.

To specify the user's RN information

Note: Remote Notification must be enabled by the user group's mailbox class before you can define the way in which the user receives Remote Notification.

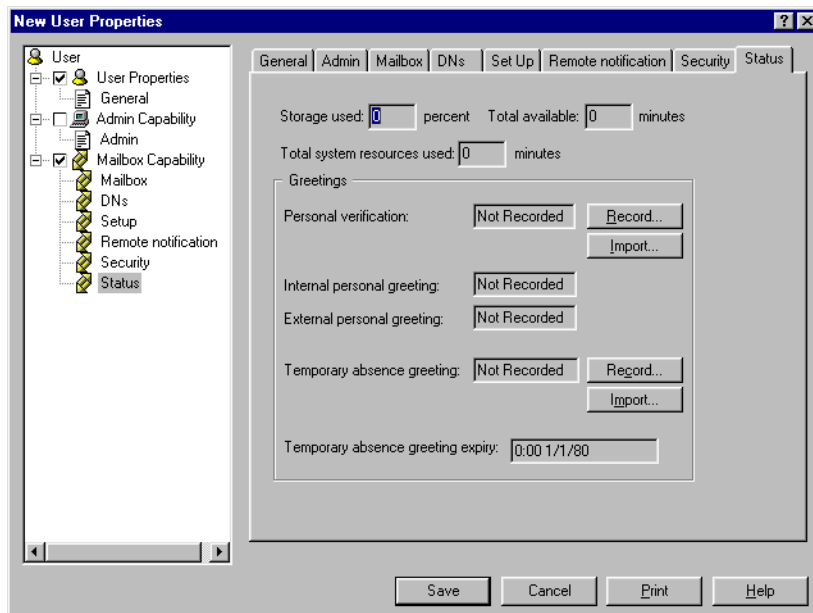
- 1 Click the Remote notification tab.



- 2 Ensure the RN on check box is checked.
- 3 In the Target number box, type the dialing number for the device that receives the notification for the user.
- 4 In the Message type list, select the type of message that is received in the user's mailbox that also triggers an RN.
- 5 In the Device type box, select the device that receives RN from the user's mailbox.
- 6 If the user's device type is a paging service, in the PIN number box, type the user's identification number to log on at the paging service.
- 7 If the user's pager can display the pager's number, in the Callback number box, type the number the user dials to access messages on CallPilot.
- 8 When you finish configuring the user's properties, click Save.

To provide a personal verification message for the user

- 1 Click the Status tab.



- 2 If the Personal verification box displays “Not Recorded,” either record the user’s name or import an existing WAV file.

Note: For additional instructions, see the context-sensitive Help.

- 3 When you finish configuring the user’s properties, click Save.

Customizing a mailbox for a specific scenario

Introduction

In many organizations, some users must share resources while others have extra resources at their disposal. Use this section to identify your scenario and the steps to configure the affected user mailboxes appropriately.

Access requirements

To edit properties, you must belong to an access class that grants Edit or Edit (mailbox users only) access to Users.

Scenario 1: The user has sole use of a phoneset but shares DNs

A manager and her assistant share the manager's telephone number so that a call to the manager rings both their phonesets. If the manager lets the phoneset ring more than twice, the assistant answers the call. The assistant also has her own extension defined on the switch.

When a call to the manager is not answered by the manager or the assistant, the Call Answering service

- sends the call to CallPilot
- presents the call as coming from the manager's extension
- leaves any message in the manager's mailbox

If the assistant receives a personal call, it rings only her own phoneset. If the call is unanswered, Call Answering leaves any message in the assistant's mailbox.

For this scenario, the following conditions are in place:

- Both extensions are assigned on the switch to the assistant. The manager's extension is assigned to both users.
- A different mailbox DN is configured on the switch for each user.

Perform the following procedures:

- [“To customize a mailbox for a manager with an assistant” on page 179](#)
- [“To customize a mailbox for a manager’s assistant” on page 179](#)

Scenario 2: The user has a shared phoneset and a unique DN

Several mailbox users sit together and use a single phoneset. The phoneset is configured with a unique extension DN for each user.

For this scenario, the following conditions are in place:

- The primary telephone extension is assigned on the switch to all the mailbox users who share the phoneset.
- A different mailbox DN is configured on the switch for each user.

Perform the following procedures:

- [“To customize a mailbox for a user with a shared phoneset” on page 180](#)
- *For each user with a pager:* [“To create separate MWIs for users sharing a phoneset” on page 180](#)

Scenario 3: A technical support group has no single phoneset but has its own mailbox and associated DNs defined on the switch

Where customers call a common phone number for the technical support group, the number does not correspond to a particular phoneset. Instead, the number is mapped to multiple phonesets. There is a single mailbox associated with that DN. Each member of the group has his or her own private DN for personal use and shares a group pager.

For this scenario, the following conditions are in place:

- The technical support group is defined on the switch as a user with its own extension DN and mailbox.
- Each group member is defined on the switch with his or her own extension DN and mailbox. These users each have two extension DNs and two mailbox DNs.

Perform the following procedures:

- [“To customize a mailbox for a user with a shared phoneset” on page 180](#)
- [“To create separate MWIs for users sharing a phoneset” on page 180](#) (using an MWI DN that is mapped to different devices)

Scenario 4: A suggestion box has a mailbox only (no phoneset)

A department might have a suggestion mailbox where customers can leave their comments. Callers can contact the mailbox via Express Voice Messaging only.

A person with a suggestion calls the Express Voice Messaging DN and specifies the published Suggestion Box mailbox in which to leave a message.

For this scenario, the suggestion box is defined on the switch as a user with its own mailbox but no telephone extension.

Perform the following procedure:

- [“To customize a mailbox for a user who shares a phoneset with a single extension but has an individual mailbox” on page 181](#)
- *Optional:* [“To create separate MWIs for users sharing a phoneset” on page 180](#) (only if a device or another mailbox user has been designated for notification of new suggestions)

Scenario 5: Users with individual mailboxes share a phoneset with a single extension DN

On a shop floor there is a single phoneset for several workers. Workers can use Express Voice Messaging to leave each other messages.

When no one answers a call to the shared phoneset, the call is sent to Express Voice Messaging. The caller can select a mailbox user from a voice menu and then use the Call Sender feature to leave a message.

For this scenario, the following conditions are in place:

- The Express Voice Messaging CDN is defined in the CallPilot SDN table.
- The same extension DN is defined on the switch for each worker.
- A different mailbox DN is defined on the switch for each worker.

Perform the following procedures:

- [“To customize a mailbox for a user who shares a phoneset with a single extension but has an individual mailbox” on page 181](#) (leaving the Mailbox DN value blank)
- *Optional:* [“To create separate MWIs for users sharing a phoneset” on page 180](#) (only for workers with pagers)

Scenario 6: Guests need an extension for callers to leave messages

In most organizations, short-term contractors and other occasional or one-time visitors need to be able to collect messages from callers.

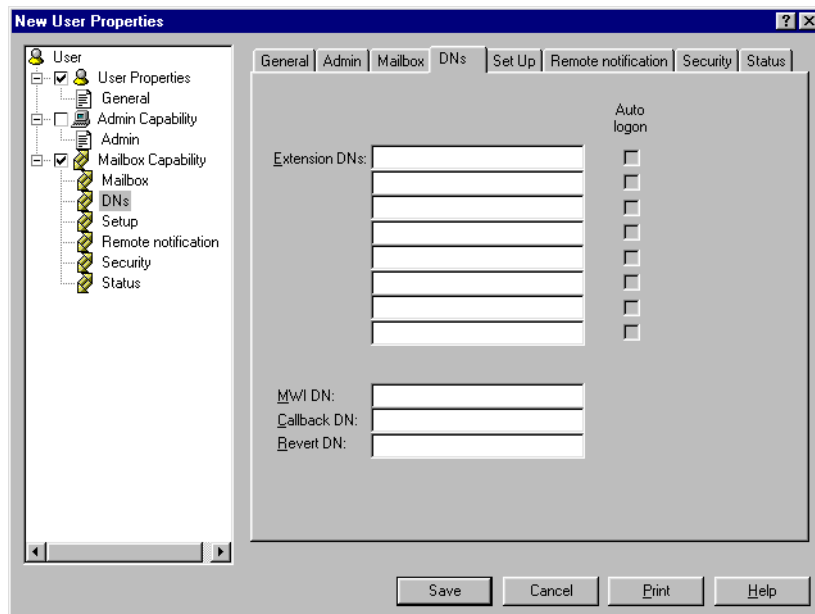
For this scenario, one option is to use the Express Voice Messaging CDN defined in the CallPilot SDN table.

Perform the following procedure:

- [“To set up a guest mailbox” on page 181](#)

Getting there

CallPilot System > User Administration > Users > Search Users > DNs tab



To customize a mailbox for a manager with an assistant

- 1 In the first Extension DNs box, type the manager's extension.

Result: The manager's extension is automatically copied into all other boxes.

- 2 When you finish configuring the user's properties, click Save.

To customize a mailbox for a manager's assistant

Note: The assistant has two extensions configured on the switch: her own and her manager's.

- 1 In the first Extension DNs box, type the assistant's extension.

Result: The assistant's extension is automatically copied into all other boxes.

- 2 When you finish configuring the user's properties, click Save.

To customize a mailbox for a user with a shared phoneset

Note: With this procedure, each user must log on to his or her CallPilot mailbox to find out who the message is for. For a workaround, see [“To create separate MWIs for users sharing a phoneset” on page 180](#).

- 1 In the first Extension DNs box, type the phoneset's primary extension.
Result: The primary extension is automatically copied into all other boxes.
- 2 Type the user's mailbox number in
 - the first Extension DNs box
 - the MWI DN box
 - the Callback DN box**Note:** If the user has a pager, type the pager number in the MWI DN box.
- 3 When you finish configuring the user's properties, click Save.

To create separate MWIs for users sharing a phoneset

- 1 *For each user with a shared phoneset:* In the MWI DN box, type the user's pager number.
- 2 When you finish configuring the user's properties, click Save.

To customize a mailbox for a technical support group without a phoneset

Requirement: You must belong to an access class that grants Edit or Edit mailbox users only access to Users.

- 1 Ensure the first Extension DNs box is empty.
- 2 Type the user's mailbox number in the Callback DN box.
- 3 In the MWI DN box:
 - a. If there is no designated device or owner, leave it blank.
 - b. If there is a designated owner, type the number of the device or the owner's pager.
- 4 When you finish configuring the user's properties, click Save.

To customize a mailbox for a user who shares a phoneset with a single extension but has an individual mailbox

Requirement: You must belong to an access class that grants Edit or Edit mailbox users only access to Users.

- 1 Ensure the first Extension DNs box is empty.
- 2 Type the telephone extension number in the Callback DN box.
- 3 In the MWI DN box:
 - a. If the user has no pager, leave it blank.
 - b. If the user has a pager, type the pager's DN.
- 4 When you finish configuring the user's properties, click Save.

To set up a guest mailbox

Requirement: You must belong to an access class that grants Edit or Edit mailbox users only access to Users.

- 1 In the CallBack DN box, type either the Express Messaging DN or the department assistant's extension.
- 2 Under the Set Up tab, in the Message waiting indication options list, click None.
- 3 When you finish configuring the user's properties, click Save.

Creating a fax buffering mailbox for a user

Introduction

To ensure faxes are received, even when a fax machine is busy or unable to answer, define a fax buffering mailbox for an individual user. When a fax machine does not answer a call, Fax Call Answering accepts the call and stores the fax message in the designated fax buffering mailbox. The owner of this mailbox can print stored faxes and then manually distribute them to users.

Use the supplied template to set up the fax buffering mailbox to automatically send a fax to a printer when the fax machine is not available.

Note: When a fax is sent to a mailbox without fax capability, the Fax Call Answering service either deposits the fax in the designated mailbox or drops the call. It never sends messages to a fax general delivery mailbox.

Unique feature

A fax buffering mailbox automatically sends fax messages to the fax machine when the machine is no longer busy. When a message is sent to the machine, its status changes to “read” and the system can delete it. For all other mailbox types, auto-printing does not change the status of a message from “unread” to “read.”

Limitations

You cannot set up Remote Notification for a fax buffering mailbox, but you can set up an MWI DN, a Revert DN, or a Callback DN.

Access requirements

To add a fax buffering mailbox, you must belong to an access class that grants

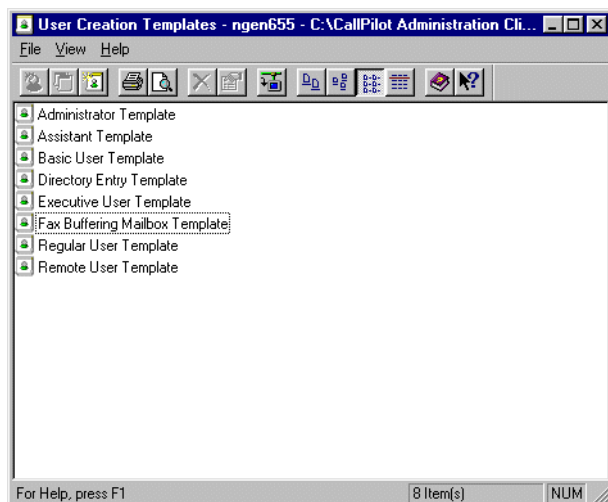
- View access to User Creation Templates
- Create/delete or Create/delete mailbox users only access to Users

Before you begin

Before you set up a fax buffering mailbox, be aware of the following factors:

- You need the fax machine's DN.
- If no name dialing and address dialing prefix has been set up in Messaging Administration for the fax buffering mailbox, you need to set up a password.

Getting there CallPilot System > User Administration > User Creation Templates



To set up a new fax buffering mailbox

- 1 In the list of templates, click Fax Buffering Mailbox Template.
- 2 In the File menu, click Add New User.

Result: The Fax Buffering Mailbox template appears.

The screenshot shows the 'New User Properties' dialog box. The 'General' tab is active. On the left, a tree view shows the hierarchy: User > User Properties > General (selected), Admin Capability, Admin, Mailbox Capability, Mailbox, DN's, Setup, Remote notification, Security, and Status. The main area on the right contains the following fields: 'First name:' with a text box, 'Initial(s):' with a text box, 'Last name:' with a text box, 'Comments:' with a large text area, 'Title:' with a text box, and 'Department:' with a text box. At the bottom of the dialog are four buttons: 'Save', 'Cancel', 'Print', and 'Help'.

- 3 In the First name box, type the user's first name.
- 4 In the Last name box, type the user's last name.
- 5 In the Comments box, type any additional information about the user.
- 6 Click the Mailbox tab.
- 7 In the Mailbox number box, type the extension DN of the fax machine.
- 8 Click the Set Up tab.
- 9 In the Default Printing DN box, type the extension DN of the fax machine.
- 10 If a prefix (for name dialing and name addressing) is not assigned in Messaging Administration, click the Security tab and assign a password.
- 11 When you finish configuring the fax buffering mailbox properties, click Save.

Adding a directory entry

Introduction

A directory entry is a user without a mailbox. You might want a directory entry for a number of situations. For example:

- A phoneset is in a meeting room or lab used by many people, so there is no mailbox for that phoneset.
- A support technician from an organization that services a user group does not have a mailbox but needs to be accessible by telephone whenever he or she is onsite.

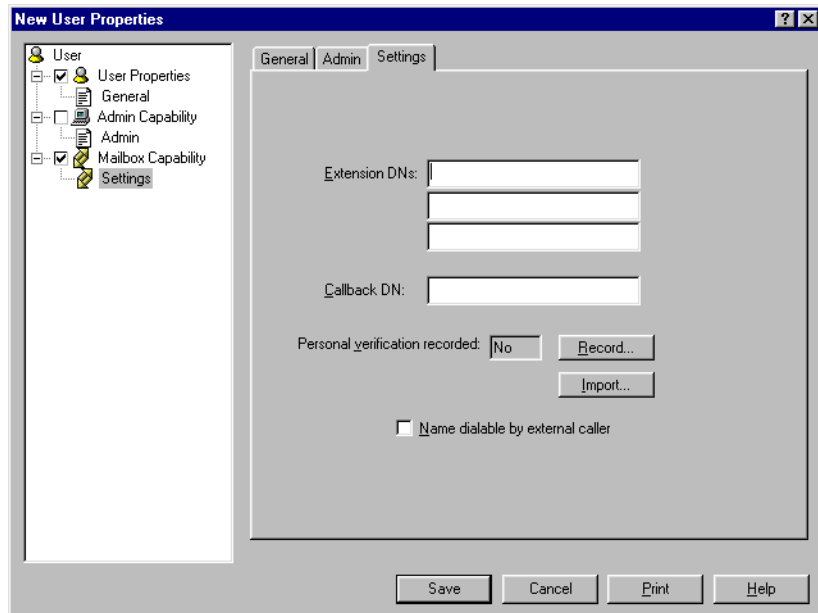
Because directory entries do not have mailboxes, they cannot use voice messaging features such as composing and sending messages, nor can they use features such as outcalling or AMIS networking.

Access requirements

To add a directory entry, you must belong to an access class that grants

- View access to User Creation Templates
- Create/delete or Create/delete mailbox users only access to Users

Getting there CallPilot System > User Administration > User Creation Templates > Directory entry template > Settings tab



To define mailbox settings for a directory entry

Note: Complete the General and Admin tabs as you do for a local user (see [“Adding an individual mailbox user” on page 162](#)).

- 1 In the first Extension DNs box, type the primary DN of the directory entry.
- 2 If the directory entry has additional extension numbers, type those in the remaining Extension DNs boxes.
- 3 If the DN that will reach this user via Call Sender or Name Dialing is different from the user's primary extension DN, overwrite the value in the Callback DN box.
- 4 If the Personal verification recorded box displays “No,” follow the instructions in [“Providing a spoken name for a user or directory entry” on page 191](#).
- 5 To let external callers call the directory entry user by spelling its name (for example, B-O-A-R-D-R-O-O-M), ensure the Name dialable by external callers check box is checked.
- 6 When you finish configuring the directory entry's properties, click Save.

Adding a CallPilot user at a remote site to the local system

Introduction

A remote user is not the same as a CallPilot user at a remote site.

- A remote user has a mailbox configured on the local CallPilot system. When using CallPilot from the office computer, the user is a local user who accesses his or her mailbox as usual. When using CallPilot away from the office, the same user is a remote user who must dial in to the system to send, receive, or download messages.
- A CallPilot user at a remote site has a mailbox configured on the CallPilot system at that site. Local CallPilot users can communicate with CallPilot users at remote sites in the same way they communicate with non-users.

The following table shows how each type of user sends and receives CallPilot messages:

	To receive messages	To send messages
A CallPilot remote user (over a dialup connection)	must dial in to the system to receive new messages	must dial in to the system to transfer sent messages to the server
A CallPilot user at a remote site	receives messages as a local user receives them	sends messages as a local user sends them

Remote User Template

The Remote User Template lets you define, on the local system, a CallPilot user at a remote site. Once a user at a remote site is defined on the local system, he or she is referred to as a CallPilot Remote User. CallPilot Remote Users and local users can communicate with one another as if they are all at the same site.

See also

- *Enterprise Networking Implementation and Administration Guide* for Product Release 1.0

Access requirements

To you add a CallPilot Remote User to the local system, you must belong to an access class that grants

- View access to User Creation Templates
- Create/delete or Create/delete mailbox users only access to Users

Before you begin

Before you add a CallPilot Remote User to the local system, you need to be aware of the following factors:

- When local CallPilot users address a message to a CallPilot Remote User, they need to hear a personal verification for the recipient.
- Local CallPilot users can use name dialing and name addressing to direct calls and messages to a CallPilot Remote User.
- While listening to a message from a CallPilot Remote User, a local CallPilot user can use Call Sender to immediately place a call to the CallPilot Remote User.
- External callers to the local CallPilot system can name-dial a a CallPilot Remote User.
- Local users and administrators can add CallPilot Remote User to distribution lists.

Getting there CallPilot System > User Administration > User Creation Templates > Remote User Template > Settings tab

The screenshot shows the 'New User Properties' dialog box with the 'Settings' tab selected. The left pane shows a tree view with 'User' expanded, and 'Settings' selected under 'Mailbox Capability'. The right pane contains the following fields and controls:

- Mailbox number:** A text box containing '164089999'.
- Extension DNs:** Three stacked text boxes, the first is empty.
- Callback DN:** A text box, empty.
- Personal verification recorded:** A label followed by a 'No' button and a 'Record...' button.
- Import...:** A button below the 'Record...' button.
- Checkboxes:** Two checkboxes, 'Name dialable by external callers' and 'Temporary user', both are unchecked.
- Last access time:** A text box containing '17:14 12/31/79'.
- Buttons:** 'Save', 'Cancel', 'Print', and 'Help' buttons at the bottom.

To define mailbox settings for a CallPilot Remote User

Note: Fill in the General and Admin tabs as you would for a local user (see [“Adding an individual mailbox user” on page 162](#)).

- 1 In the Mailbox number box, type the CallPilot Remote User's mailbox number, as it would be dialed by a local user.
Example: If a local user dials a prefix (such as 6) and an ESN number (such as 408-9999) to reach the CallPilot Remote User, type 64089999 in the Mailbox number box.
- 2 In the first Extension DNs box, type the primary telephone number of the user's mailbox.
- 3 If the directory entry has additional extension numbers, type those in the remaining Extension DNs boxes. Use the same format (that is, include the prefixes and ESN number) that you used for the primary DN.

- 4 If the DN that will reach this user via Call Sender or Name Dialing is different from the user's primary extension DN, overwrite the value in the Callback DN box.
- 5 If the Personal verification recorded box displays "No," follow the instructions in ["Providing a spoken name for a user or directory entry" on page 191](#).
- 6 To let external callers call the CallPilot Remote User by name dialing, ensure there is a check mark in the Name dialable by external callers box.
- 7 To automatically remove a CallPilot Remote User from the system once the user is no longer frequently called, ensure the Temporary user check box is checked.
- 8 When you finish configuring the CallPilot Remote User's properties, click Save.

Providing a spoken name for a user or directory entry

Introduction

Record a unique name for the user or directory entry that identifies the phoneset to someone sending a message or composing a distribution list.

Access requirements

You must belong to an access class that grants Edit or Edit mailbox users only access to Users.

Getting there CallPilot System > User Administration > Users > Search Users > Settings tab

The screenshot shows the 'New User Properties' dialog box with the 'Settings' tab selected. The left pane shows a tree view with 'User' expanded, containing 'User Properties', 'General', 'Admin Capability', 'Admin', 'Mailbox Capability', and 'Settings'. The right pane contains the following fields and controls:

- Mailbox number:** Text field containing '164089999'.
- Extension DNs:** Three stacked text fields.
- Callback DN:** Text field.
- Personal verification recorded:** A dropdown menu showing 'No', with 'Record...' and 'Import...' buttons.
- Name dialable by external callers:** A checkbox.
- Temporary user:** A checkbox.
- Last access time:** Text field containing '17:14 12/31/79'.

At the bottom are buttons for 'Save', 'Cancel', 'Print', and 'Help'.

To record a spoken name for a CallPilot Remote User

- 1 To record a name on behalf of the user or directory entry, click Record.

Result: The Specify Phoneset dialog box appears.



- 2 In the Enter a phone number box, type the phone number of the phoneset you want to use for recording.
- 3 Answer the phoneset when it rings.

Result: The Voice Recorder dialog box appears.



- 4 Click Record.
- 5 Speak a name for the CallPilot Remote User into the phoneset.
- 6 Click Stop.
- 7 To review the recorded name, click Play.
- 8 To save the recording, click Done to return to the Settings tab.

To import a WAV file

- 1 Click Import.
- 2 Select the file that contains the appropriate recording.
- 3 Click Open.
- 4 Click OK.

Deleting a user or directory entry

Introduction

When a mailbox user, a CallPilot Remote User, or a directory entry is no longer required, delete it to prevent hackers from making use of it.

Note: If you customize a user search to describe a group that periodically needs deletion (such as mailboxes that have been inactive for three months), you can use the Shift key to select all users in the group.

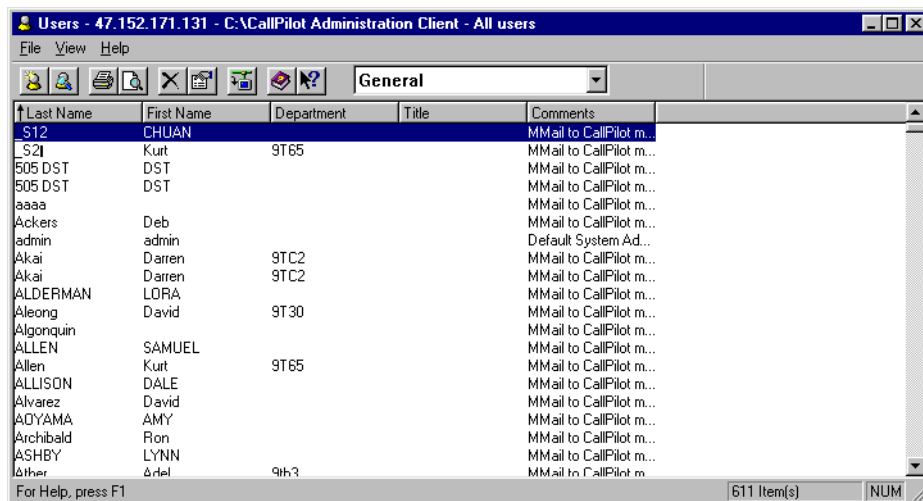
See also

- [Chapter 12, “Searching for users”](#)

Access requirements

You must belong to an access class that grants Create/delete or Create/delete mailbox users only access to Users.

Getting there CallPilot System > User Administration > Users > Search Users > list of found users



To delete a user or directory entry

- 1** Click the user you want to delete.
- 2** On the File menu, click Delete.
- 3** In the confirmation box, click Yes.

Part 3

Extending system functionality

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Chapter 16

Overview of optional services

In this chapter

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Multimedia Messaging

Introduction

Multimedia Messaging gives users a single multimedia mailbox and a single point of access for both voice and fax messages. Users can compose, send, receive, and manipulate voice, fax, and multimedia (combined voice and fax) messages from a single mailbox.

Express Voice Messaging

Express Voice Messaging allows both internal and external callers to route voice messages directly to users' mailboxes.

Express Voice Messaging

- makes it unnecessary to call a user's phoneset first and then be forwarded to the user's mailbox
- allows callers who reach a human attendant to leave a voice message in the user's mailbox on the same call
- allows callers who reach a voice menu to leave a message in a user's mailbox
- allows an administrator to set up a guest mailbox without linking it to a phoneset

Express Fax Messaging

Multimedia Messaging and Express Fax Messaging differ in the following ways:

- Multimedia Messaging allows a mailbox user to send a fax to another mailbox user, as long as his or her mailbox has fax capability enabled.
- Express Fax Messaging allows internal or external callers to route faxes from a faxphone to a user mailbox. It can be set up in two ways: to send the fax to a predefined mailbox or as direct fax delivery, which routes faxes directly to the specified user's mailbox.

Direct fax delivery

With direct fax delivery, callers dial one company-wide or department-wide fax number. Callers need to know only the service DN and the user's mailbox number. The fax is put directly into the specified mailbox. Direct fax delivery improves the timeliness and confidentiality of transmissions, and frees clerical personnel for other tasks.

Multiple Express Fax Messaging

With multiple Express Fax Messaging services, you can set up several fax message desks for different departments. You can set up each Express Fax Messaging service with a unique SDN, or you can create an Application Builder application to make multiple fax message desks available from a voice menu.

See also

- [“To add an SDN” on page 223](#)
- [“Configuring a fax mailbox for a group” on page 246](#)
- [Chapter 19, “Configuring outcalling services”](#)
- [Chapter 22, “Managing channels \(M1 switch only\)”](#)
- information about creating an application in *Application Builder Guide*

Multimedia Call Answering

Introduction

Multimedia Call Answering enables mailbox users to receive mixed voice and fax messages during a Call Answering session.

Users can receive any of the following messages:

- a multimedia message (fax and voice)
- a voice-only message
- a fax-only message

Message blocking

You can configure a mailbox so that

- incoming messages are automatically blocked
- incoming messages are automatically blocked when the user activates a temporary greeting

Requirements

The Multimedia Messaging CDN on the switch must be defined in the CallPilot SDN table as a Voice Messaging SDN with media type fax. DN's associated with user mailboxes must be configured to forward messages to this SDN.

Matra switch caveat

If the Matra switch is not properly configured, messages might be forwarded to the Voice Messaging CDN rather than the Multimedia Messaging CDN.

See also

- switch configuration information in the *Installation and Configuration Guide*

Fax Call Answering

Introduction

Fax Call Answering behaves like a fax machine. There is no greeting or voice prompt played for callers.

Personal Fax Call Answering

Some users might want or need a personal fax number that is different from their regular phoneset number. With a different fax number, senders think they are calling a real fax machine. For this setup, users do not need dedicated fax machines or analog lines.

To give a user a unique fax number, you must set up a phantom DN (on the M1) for the user and make sure the DN is always forwarded to the Multimedia Messaging SDN.

Based on how the mailbox is set up, received faxes are either immediately printed to the user's designated default fax machine or stored in the CallPilot mailbox. MWI indicates there is a new message. The recipient can use the CallPilot Desktop Messaging client to view the message on-screen and print it to a shared printer or fax machine.

See also

- [“Customizing a mailbox for a typical user” on page 165](#)

Outcalling services

Introduction

Outcalling services require an outbound SDN before they can perform their functions. You cannot create an outbound SDN in the SDN Table. Typically, it is one of the default SDNs on the switch and is automatically included in the SDN Table.

Outcalling services include

- Remote Notification (RN)
- Delivery to Telephone (DTT)
- Delivery to Fax (DTF)

Remote Notification

Remote notification (RN) service generates notifications that inform users of new voice, email, fax, or multimedia messages. Notifications can be sent to remote phonesets or to pagers.

A notification might or might not include the message. If a notification is sent to a voice or alphanumeric pager, the new message can be played or displayed to the recipient.

The administrator must enable RN for users, but either the user or the administrator can configure the destination for notifications and the schedule for generating them.

To enable RN service and define rules for the user group, configure the RN options for the associated mailbox class.

Delivery to Telephone

Enable Delivery to Telephone (DTT) for user groups that need to be able to compose and send voice messages to phonesets, whether or not they have mailboxes associated with them.

Delivery to Fax

While Multimedia Messaging allows users to send faxes to other mailbox users who have fax capability, Delivery to Fax (DTF) service allows users to send faxes to internal or external faxphones.

Delivery of multimedia messages to nonusers

The DTT service is used to send the voice portion of a multimedia message addressed to an external recipient. DTT has its own defined time periods during which CallPilot is permitted to send DTT messages. In this case, messages are checked against the intersection of the DTT and DTF time ranges.

Example

The allowed delivery time for DTT is 9:00 a.m. to 8:00 p.m. The allowed delivery time for DTF is 8:00 a.m. to 11:00 p.m. Thus, the allowed delivery time for a multimedia message is 9:00 a.m. to 8:00 p.m., since this is the period of time that overlaps the two allowed delivery time periods.

Delivery of fax messages to nonusers

Multimedia Messaging and DTF service differ in the following ways:

- Multimedia Messaging allows transmission of fax messages between CallPilot mailbox users.
- DTF service allows users to send faxes to external faxphones.

How to use DTT and DTF services in your organization

DTT and DTF can be used to facilitate communications

- by supporting telecommuters
- as a reminder service

Supporting telecommuters

Telecommuters' home phonesets do not have mailboxes defined on the system. If DTT is enabled for a user group, team members at work can send message items to any other team member, regardless of where they are working. If DTF is also enabled, mailbox users can also send fax items to team members with access to a fax device.

DTT as a reminder service

When combined with the Timed Delivery service, DTT can function as a reminder service. Users can record voice messages to themselves (either at the office or at home) and tag them for timed delivery.

Multimedia messages

For messages that contain both voice and fax, CallPilot assumes that the address is either a telephone number or a fax number. Based on how the call is answered, the system sends the voice part, the fax part, or both parts of the message.

See also

- [“Express Fax Messaging” on page 198](#)
- [Chapter 19, “Configuring outcalling services”](#)

Speech Activated Messaging services

Introduction

Speech Activated Messaging provides a form of hands-free messaging. Users give commands by speaking them instead of by pressing phoneset keys. This means that users can use a rotary phoneset to give spoken commands that

- log the user on
- navigate the mailbox
- play messages
- print faxes
- respond to messages

Speech Activated Messaging provides an alternate way to access messaging and call answering features without providing additional features. Users can interrupt playback of system prompts, voice messages, and other recorded voice items to issue a command (for example, to switch to Paced Speech Messaging, if it is configured with its own SDN).

Speech Activated Messaging required continuous digit entry, which allows users to speak naturally, without pausing between each digit.

Paced Speech Messaging

For users with accents or speech impediments, or who call frequently from a noisy environment, Paced Speech Messaging provides greater accuracy. It prompts the user to speak the next digit and then validates the digit. When the validation fails, it queries the user.

Limitations

Speech Activated Messaging does not allow users to record personal greetings or verifications, create or edit personal distribution lists, use the Goto command, or change the mailbox password (unless prompted because the password has expired).

Automatic access to Paced Speech messaging

Three unsuccessful attempts to speak a command activates the Paced Speech Messaging service and offers the user the option to switch to touchtone input.

Recommendation

Define a separate SDN for Paced Speech Messaging so that users who consistently have problems with continuous digit entry can dial the Paced Speech Messaging service directly.

Requirements

To provide Speech Activated Messaging and Paced Speech Messaging to CallPilot system users, you need to

- enter the speech recognition keycode when installing the system
- configure two phantom DN's on the switch for each language supported and then add each phantom DN to the SDN Table

Note: Phantom DN's are configured on M1 and MSL-100 switches. Third party switches use hunt group technology instead.

- allocate some multimedia channels as speech recognition channels
- enable speech recognition capability in the applicable mailbox classes

See also

- information about SDNs and the SDN Table in *Installation and Configuration Guide*
- [“Adding an SDN” on page 221](#)
- [“Enabling multimedia mailbox capabilities” on page 238](#)
- [“Allocating channels to services” on page 291](#)

Multilingual mailbox and answering services

Introduction

You can use CallPilot to provide mailbox or Call Answering services in different languages.

The system allows you to do any or all of the following options:

- configure mailboxes to prompt users in the language of choice
- configure mailboxes to answer callers (through Call Answering) in the language of the mailbox user's choice
- configure Call Answering to be bilingual
- configure Application Builder applications in any installed language
- use an Application Builder block to specify a language

See also

- ["Relationship between mailbox classes and user creation templates" on page 279](#)

Requirement

The CallPilot system must be installed with all desired languages. If necessary, upgrade the system to install additional languages.

See also

- information about upgrading the system in *Installation and Configuration Guide*

Configuring mailbox prompts in a specified language

Within an organization, some user groups might prefer to use different languages. You can configure CallPilot user mailboxes to prompt users in a specific language, either at the group level or for individuals.

For a user group that prefers a language other than the primary language, modify the user template for creating group members. If necessary, create specialized user templates for user groups who prefer the second language

For existing users who prefer the new language, modify the user mailbox properties to specify the new language (see [“To assign a default mailbox class” on page 101](#)).

See also

- [“To modify mailbox capabilities for the user” on page 170](#)

Configuring call answering services for bilingual or preferred-language prompts

By default, all supplied mailbox classes are configured to provide call answering services in the primary language. You can configure mailbox classes to provide call answering services in either dual language prompts or in the mailbox user’s preferred language.

See also

- [“Configuring the language for call answering voice prompts” on page 240](#)
- [“Making system greetings bilingual” on page 242](#)

Using front-end voice menus to determine the language for a service

If you want callers to hear voice prompts immediately in a language that has been added to the CallPilot system, use Application Builder to create a front-end application for each language. Then add an SDN for each additional language and publish the SDNs to interested parties.

When you add the SDNs, configure the session profiles to specify the language. If the service media type is speech recognition, the language specification applies to voice responses as well as voice prompts.

See also

- [“Adding an SDN” on page 221](#)
- [“To specify the language for session prompts and speech recognition” on page 226](#)

- [“Making system greetings bilingual” on page 242](#)
- information about creating applications in the *Application Builder Guide*

Media requirements for CallPilot services

Introduction

Different services process different types of data. Certain kinds of data (such as fax and speech recognition) require more channel resources to process them. For example, a fax service requires twice as much processing power as a voice service. A speech recognition service requires four times as much processing power as a voice service.

Types of channels

As a result, three types of multimedia channels handle this variety of processing requirements:

- voice
- fax
- speech recognition

Media type

As part of SDN configuration, you must select the appropriate media type to ensure the service has access to the required processing power.

Application Builder applications that contain Multimedia messaging or Express Fax Messaging must have access to fax channels.

Built-in services versus created services

For built-in CallPilot services, such as Voice Messaging or Express Fax Messaging, the media type is automatically selected. For applications created with Application Builder, you must select the media type that is appropriate for the service.

Media do not share channels

The media type assigned to a service prevents a service from using channels of another type. This means that voice services use voice channels only. This is true even if all voice channels are busy and some fax channels are idle. This approach ensures that traffic bursts can be handled simultaneously for all media types.

Example

You have a 24-channel system that is partitioned into 16 voice channels, 2 fax channels, and 1 speech recognition channel. There is a burst of fax activity on your system, and all of the fax channels become busy. Another fax call comes in to the system. There are no fax channels to handle the call. The speech recognition channel is idle but not used. Instead, the call waits until there is an idle fax channel.

At another point in the day, all voice channels become busy. Additional calls to voice services are prevented from using the idle fax channels. The fax channels remain available to handle any calls to fax services that come in.

See also

- information about resource allocation in *Installation and Configuration Guide*
- [“Allocating channels to services” on page 291](#)

Chapter 17

Making optional services available

In this chapter

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<u>Shareable SDNs</u>	<u>220</u>
<u>Adding an SDN</u>	<u>221</u>
<u>Configuring a session profile for voice menus and features</u>	<u>224</u>
<u>Configuring an SDN for sharing</u>	<u>228</u>
<u>Configuring fax callback handling</u>	<u>230</u>

SDNs and service behavior

Introduction

SDNs correspond to numbers that have been configured on the switch. Each SDN you enter in the SDN Table must correspond to one of the following numbers on the switch:

- the Control DN of an ACD queue
- the DN of a Phantom TN (MSL-100 switch)

In addition to providing a unique dialable number for each CallPilot service, the SDN configuration also determines certain aspects of the service's behavior.

Channel media type

A service's SDN controls the type of channels the service can use (voice, fax, or speech recognition), the number of channels that are guaranteed for that service, and the maximum number of channels that the service can use at any one time. These options are available when you configure an SDN. They control the minimum and maximum number of channels available for a given service.

Session profile

For certain types of services, such as Application Builder services, the SDN configuration includes a session profile. This profile determines how the service behaves during a call session (for example, the maximum session length and the maximum number of faxes callers can select).

Fax callback handling

If a service includes fax items that can be delivered on a separate call to numbers entered by callers, you must also define fax callback handling properties. You must select an appropriate RPL to control the callback numbers to which CallPilot can deliver faxes.

Multiple SDNs for a single service

Create more than one SDN for a service whenever you need to configure different session profiles for different user groups.

Examples

- Whenever a block in an Application Builder application must behave differently from other blocks in the application, create the block as a separate application instead of as a block within a single application. Then you can configure the session profile for each use of the application block. For more information, see the *Application Builder Guide*.
- If your CallPilot system supports multiple languages for Fax Item Maintenance, Voice Item Maintenance, Speech Activated Messaging, or Paced Speech Messaging, create an SDN for each supported language, for each service.

Inbound and outbound SDNs

Inbound SDNs are required for dialable services. The SDN is the number that callers dial to access the service. You must add these SDNs to the SDN Table. Once added, you can change their default configuration.

Outbound SDNs are added to the SDN Table automatically during installation. Outbound SDNs are not dialed by callers. They are used by the system to place outbound calls and to determine the channel resources allocated to the service. You cannot use the CallPilot Administration Client to create or modify outbound SDNs.

Outbound SDNs

Typical default outbound SDNs listed in the SDN table are as follows:

- OUTBOUND11 (Remote Notification)
- OUTBOUND15 (Multi-delivery to Fax)
- OUTBOUND18 (Desktop Telephony Agent)
- OUTBOUND6 (Admin Agent)
- OUTBOUND7 (Delivery to Telephone)
- OUTBOUND8 (Delivery to Fax)

- OUTBOUND9 (Enterprise Networking)

If your system was purchased with the appropriate keycode, there might also be SDNs for

- AMIS Networking
- Multimedia Messaging

SDNs for fax services

Introduction

If you want a fax service to be able to deliver faxes to more than national numbers, international numbers, ESN numbers, or CDP numbers, you have three options:

- Create separate SDNs for each required callback format.
- Create a menu as a front end.
- Create only one SDN.

Option 1: Separate SDNs

Create separate SDNs for each caller market (for example, local, long distance, and international) and publish the appropriate SDN to each market.

Note: As an alternative, you can create two SDNs: one for local and long distance callers (which requires callers to always enter the area code but not the country code), and one for international callers.

Advantage

This option is easiest for users.

Option 2: Menu front end

Create a menu in Application Builder as a front end that allows callers to specify where their fax machine is located. CallPilot then prompts callers to enter the callback number in the required format.

Note: You still need to create multiple SDNs for each service that is activated in the menu. The only way to have a variety of callback number formats is to create one SDN per required format.

Example: Front-end menu for receiving a fax item

Your company is located in Boston. You have a new product bulletin (in TIFF-F format) that you want to make available to your North American customers. However, you also have a strong European customer base, so you also want to make this bulletin available to your European customers. You want to create only one set of marketing materials and publish one number for both caller markets.

To set up this service, do the following actions:

1. Add an SDN (for example, 4010) which invokes this fax item. Set its callback number treatment (on the Callback Handling tab) to National.
2. Add an SDN (for example, 4110) which also invokes this fax item. Set its callback number treatment (on the Callback Handling tab) to International.
3. Add an SDN for the menu (for example, 4009).
4. Create the menu.
 - Make menu choice 1 call SDN 4010.
 - Make menu choice 2 call SDN 4110.
 - Record a prompt that instructs callers on what to do. For example: “If your fax machine is in North America, press 1. If your fax machine is in any other country, press 2.”

Result

- Callers dial 4009 to access the voice menu.
- When a caller presses 1, the system calls SDN 4010. The session profile for SDN 4010 is used. The system prompts the caller to enter an area/city code and the fax number.
- When a caller presses 2, the system calls SDN 4110. The session profile for SDN 4110 is used. The system prompts the caller to enter a country code, area/city code, and fax number.

Advantage

Only the SDN of the main menu service needs to be published to callers.

Option 3: Single SDN

For all callers, create a single SDN that is configured to handle international callback numbers. Callers are always prompted to include their country code and area code as part of the fax number, even if they are within the same country or area code.

Advantage

You do not need a menu for selecting country codes, as required by Option 2.

Disadvantage

Many people who are unfamiliar with international dialing do not know their country code. Callers within your country code might, therefore, have difficulty using the service.

See also

- [“Adding an SDN” on page 221](#)
- [“Configuring a session profile for voice menus and features” on page 224](#)
- [“Configuring fax callback handling” on page 230](#)

Shareable SDNs

Introduction

Networking services can have their own dedicated SDNs or they can share an SDN with another service, such as an Application Builder voice menu or Voice Item Maintenance.

Networking SDNs and session profiles

When an AMIS or Enterprise call comes in to the system, the SDN recognizes the initiator tone. CallPilot switches to the appropriate networking service so that the inbound network call can be answered.

Note: Only Voice Item Maintenance and Fax Item Maintenance can be configured to use the setting, Act on AMIS/Enterprise initiator tone.

Shared SDNs allow you to reduce the number of required SDNs and MSL-100 Phantom DN.

SDN queues

You can share multiple SDNs with these networking services so that if a networking call comes in to an SDN that is busy, the network call can try coming in on another SDN that is configured for sharing.

Because session profiles are required only by certain services, AMIS Networking, Integrated AMIS Networking, and Enterprise Networking must share an SDN with one of the following services:

- any Application Builder service
- Express Voice Messaging
- Express Fax Messaging
- Fax Item Maintenance

Adding an SDN

Introduction

Use this procedure to make optional features and front-end voice menus available to mailbox users or external callers.

Requirements

Any required Application Builder applications or voice menus must already be added to the system. Use the following procedure to associate these applications with a dialable number.

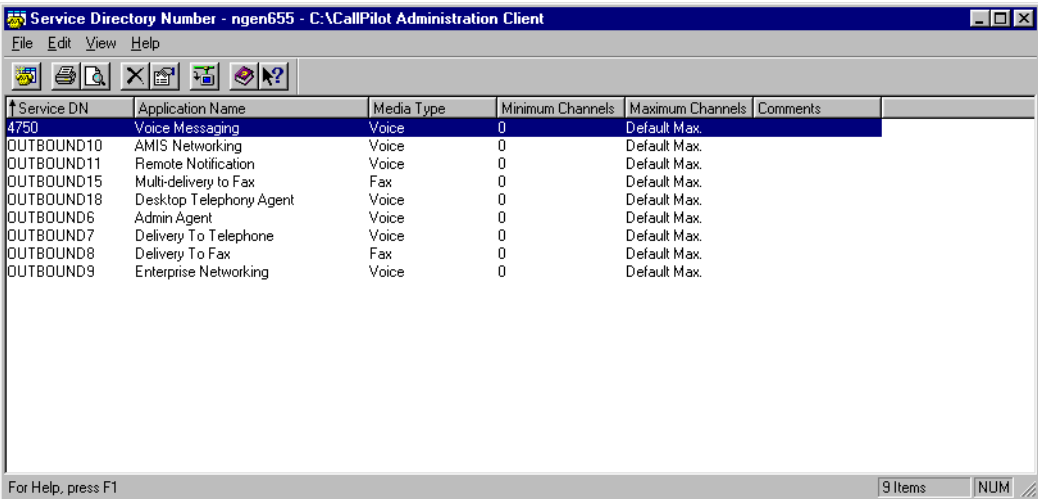
See also

- [“SDNs for fax services” on page 217](#)
- information about creating applications in the *Application Builder Guide*

Access requirements

You must belong to an access class that grants Create/delete access to Service Directory Number.

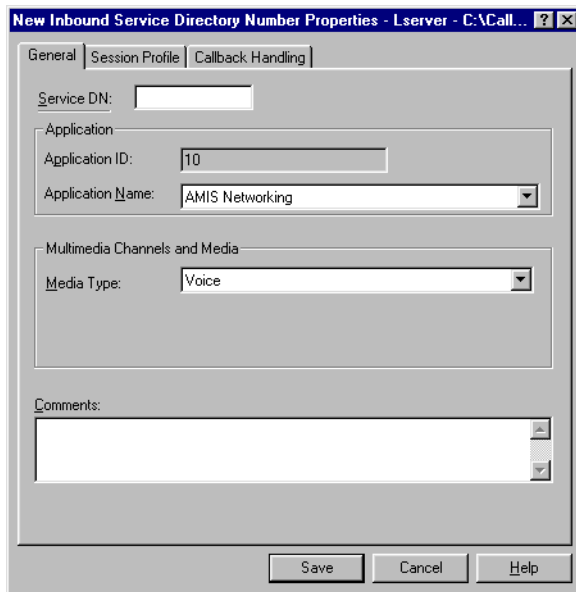
Getting there CallPilot System > System Administration > Service Administration > Service Directory Number



Service DN	Application Name	Media Type	Minimum Channels	Maximum Channels	Comments
4750	Voice Messaging	Voice	0	Default Max.	
OUTBOUND10	AMIS Networking	Voice	0	Default Max.	
OUTBOUND11	Remote Notification	Voice	0	Default Max.	
OUTBOUND15	Multi-delivery to Fax	Fax	0	Default Max.	
OUTBOUND18	Desktop Telephony Agent	Voice	0	Default Max.	
OUTBOUND6	Admin Agent	Voice	0	Default Max.	
OUTBOUND7	Delivery To Telephone	Voice	0	Default Max.	
OUTBOUND8	Delivery To Fax	Fax	0	Default Max.	
OUTBOUND9	Enterprise Networking	Voice	0	Default Max.	

To add an SDN

- 1 On the File menu, click New.



The screenshot shows a dialog box titled "New Inbound Service Directory Number Properties - Lserver - C:\Call...". It has three tabs: "General", "Session Profile", and "Callback Handling". The "General" tab is selected. It contains the following fields and controls:

- Service DN:** A text input field.
- Application:**
 - Application ID:** A text input field containing the value "10".
 - Application Name:** A dropdown menu showing "AMIS Networking".
- Multimedia Channels and Media:**
 - Media Type:** A dropdown menu showing "Voice".
- Comments:** A large text area with a scroll bar.
- Buttons:** "Save", "Cancel", and "Help" buttons at the bottom right.

- 2 On the General tab, in the Service DN box, type the dialable number you want to assign to the service or front-end voice menu.
- 3 In the Application Name list, click the feature or voice menu that you want to enable.
- 4 In the Media Type list, select Fax.
- 5 If the Service DN requires no additional configuration, click Save.

Configuring a session profile for voice menus and features

Introduction

Configure a session profile for

- any Application Builder voice menu or feature
- Express Voice Messaging
- Express Fax Messaging

See also

- [“SDNs for fax services” on page 217](#)

Access requirements

To configure a session profile for an existing SDN, you must belong to an access class that grants Edit access to Service Directory Number.

To configure a session profile for a new Express Voice Messaging or Express Fax Messaging SDN, you must belong to an access class that grants Create/delete access to Service Directory Number.

Getting there

CallPilot System > System Administration > Service Administration > Service Directory Number > Session Profile tab

The screenshot shows a Windows-style dialog box titled "New Inbound Service Directory Number Properties - Lserver - C:\Call...". It has three tabs: "General", "Session Profile", and "Callback Handling". The "Session Profile" tab is selected. The dialog contains several input fields and checkboxes. At the top, "Session time limit" is set to 10 minutes and "Maximum invalid password entries" is set to 10. Below these, there is a "Mailbox number" text box, a "Language" dropdown menu set to "English(American)", and an unchecked checkbox for "Act on AMIS/Enterprise networking initiator tone". A "Fax setting" section is expanded, showing a checked "Fax selections" checkbox with a "Maximum number" of 5, a "Page limit for fax items" of 40, a "Sender fax number" text box, an unchecked "Sponsor fax item" checkbox with an "Import..." button, a "Billing DN" text box, "Page transmission error handling" with radio buttons for "Continue" (selected) and "Retransmit", and a "Fax delivery options" dropdown set to "Callback". At the bottom are "Save", "Cancel", and "Help" buttons.

To limit session length and number of consecutive logon attempts

- 1 In the Session time limit box, type the maximum number of minutes callers can stay on the line to use a service.
Note: This limit prevents malicious callers from using up your system's resources.
- 2 In the Maximum invalid password entries box, type the maximum number of times a caller can enter an invalid password when accessing a password-protected service. If this number is exceeded, CallPilot disconnects the call.
Note: This step is necessary only if the SDN is for an Application Builder application that includes a password check block.
- 3 When you finish configuring the SDN, click Save.

To configure Express Voice Messaging or Express Fax Messaging

Example: DN 3654 is defined in the SDN Table for Express Fax Messaging. Mailbox number 8050 is specified in the Session Profile for the Express Fax Messaging DN.

Note: If the Mailbox number is left blank, the system prompts callers for the mailbox number.

- 1 In the Mailbox number box, type the mailbox number for the fax machine or attendant, depending on the service being configured.
- 2 When you finish configuring the SDN, click Save.

To specify the language for session prompts and speech recognition

Note: The Language list is available only if the Application Builder application requires it (*not* used for Express Voice Messaging or Express Fax Messaging.)

- 1 In the Language list, click the installed language for the service being configured.
- 2 When you finish configuring the SDN, click Save.

To configure fax options

- 1 Ensure the Fax selections check box is checked.
- 2 In the Maximum number box, type the maximum number of fax items a caller can request for delivery during one call.
- 3 In the Page limit for fax items box, type the maximum number of fax pages that can be transmitted to a caller during one call.
- 4 In the Sender fax number box, type the DN of the fax machine that sends faxes.

Note: This number appears on printed pages.

- 5 To include a custom cover page with faxes, do the following actions:
 - a. Ensure the Sponsor fax item check box is checked.
 - b. Click Import to open a list of files.
 - c. Select the file that contains the custom page, and click Open.

Note: The file must be in TIFF-F format.

- 6 In the Billing DN box, type the telephone number to be charged for callback fax transmissions.
Note: If this number is not specified, calls are charged to the SDN.
- 7 Specify how the system responds to transmission errors by clicking one of the Page transmission error handling buttons:
 - Click Continue if you want the system to ignore an error and transmit the next page.
 - Click Retransmit if you want the system to stop the current fax and resend it.
- 8 From the Fax delivery options list, select the method by which faxes are sent (Callback, Same Call, or Caller's Choice).
- 9 When you finish configuring the SDN, click Save.

Configuring an SDN for sharing

Introduction

To share an existing SDN with one of these networking services, the session profile of the shared service must have the Act on AMIS/Enterprise initiator tone option enabled.

Note: Only Voice Item Maintenance and Fax Item Maintenance can be configured to use the setting, Act on AMIS initiator tone.

You can configure any of the following services to share its SDN with your AMIS or Enterprise networking service:

- any Application Builder service
- Express Voice Messaging
- Express Fax Messaging
- Fax Item Maintenance

Access requirements

You must belong to an access class that grants Edit access to Service Directory Number.

Getting there

CallPilot System > System Administration > Service Administration > Service Directory Number > Session Profile tab

The screenshot shows a Windows-style dialog box titled "Edit Service Directory Number Properties - 47.152.171.131 - C:\CallP...". It has three tabs: "General", "Session Profile", and "Callback Handling". The "Session Profile" tab is selected. The dialog contains several settings:

- Session time limit:** 10 minutes (with up/down arrows).
- Maximum invalid password entries:** 10 (with up/down arrows).
- Mailbox number:** An empty text field.
- Language:** A dropdown menu showing "English(American)".
- Act on AMIS/Enterprise networking initiator tone:** A checkbox that is currently unchecked.
- Fax setting:** A section containing:
 - Fax selections:** A checked checkbox, followed by "Maximum number:" and a field showing "5" with up/down arrows.
 - Page limit for fax items:** A field showing "40" with up/down arrows.
 - Sender fax number:** An empty text field.
 - Sponsor fax item:** An unchecked checkbox, followed by an "Import..." button and an empty text field.
 - Billing DN:** An empty text field.
 - Page transmission error handling:** Two radio buttons, "Continue" (selected) and "Retransmit".
 - Fax delivery options:** A dropdown menu showing "Callback".

At the bottom of the dialog are three buttons: "Save", "Cancel", and "Help".

To configure an SDN to share its resources with a networking service

Note: Only Voice Item Maintenance and Fax Item Maintenance can be configured to use the setting, Act on AMIS/Enterprise initiator tone.

- 1 Ensure there is a check mark in the Act on AMIS/Enterprise initiator tone option box.
- 2 When you finish configuring the SDN, click Save.

Configuring fax callback handling

Introduction

When planning callback handling options, identify how callback numbers need to be treated for the service you are configuring. Callback numbers must be in a format that the system can use to generate a dialable number. This ensures that the requested fax items can be delivered.

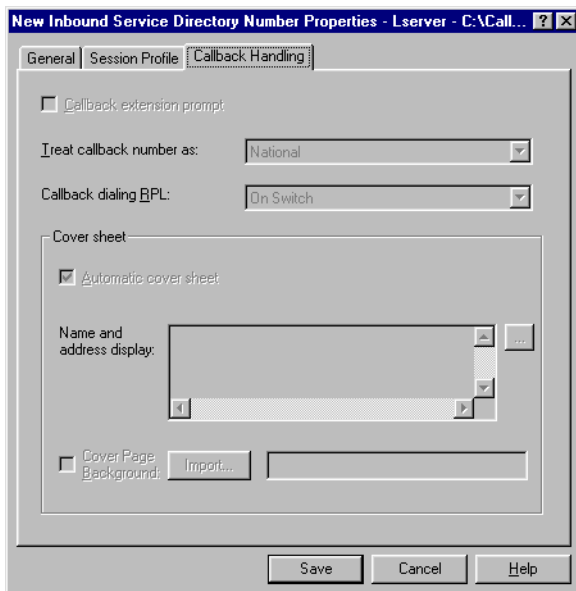
The treatment you select determines how callers are prompted to enter fax callback numbers. Ensure that callers are prompted to enter the necessary dialing codes, such as country code or area code. Identify the potential calling audience and where the members will be calling from. CallPilot needs the correct access code to originate a telephone call from the switch.

Note: If all boxes are disabled, no further configuration is necessary.

Access requirements

You must belong to an access class that grants Edit access to Service Directory Number.

Getting there CallPilot System > System Administration > Service Administration > Service Directory Number > Callback Handling tab



To obtain the callback DNS

Note: To include caller numbers in the fax trimtab, configure the system to prompt callers for their extensions when they call for faxes.

- 1 Ensure the Callback extension prompt box is checked.
- 2 From the Treat callback number as list, select the type of callback numbers supported by the service.
- 3 When you finish configuring the SDN, click Save.

To restrict delivery to certain numbers

ATTENTION

Because services with callback capability can originate calls from the switch, your system is charged for these calls. To prevent unauthorized callers from abusing your system and incurring long distance charges, select an appropriate RPL.

- 1 From the Callback dialing RPL list, select the appropriate RPL.
- 2 When you finish configuring the SDN, click Save.

See also

- [Chapter 7, “Customizing dialing restrictions and permissions”](#)

To include a system cover page

- 1 Under the Callback Handling tab, make sure there is a check mark in the Automatic cover sheet check box.

Note: A custom cover page for this service is recommended.

- 2 To specify the organizational information you want printed on the cover page, click the Name and address display box, and then type your business name, address, and telephone number.
- 3 To include a logo or graphic on the system cover page, make sure the Cover Page Background check box is checked. Otherwise, go to step [6](#).
- 4 To specify the file that contains the logo or graphic, click Import.
- 5 Select the graphic file and click OK.
- 6 When you finish configuring the SDN, click Save.

Chapter 18

Configuring mailboxes for optional services

In this chapter

_Specifying multimedia mailbox storage limits	236
_Enabling multimedia mailbox capabilities	238
_Configuring the language for call answering voice prompts	240
_Making system greetings bilingual	242
_Configuring the fax general delivery mailbox	244
_Configuring a fax mailbox for a group	246
_Configuring a broadcast mailbox	247

Specifying multimedia mailbox storage limits

Introduction

The maximum size of a Fax Call Answering message is the number of pages equivalent to the maximum size of a Voice Call Answering message, rounded up to the nearest whole page. One minute of voice is equivalent to approximately 3.5 pages of fax. If the maximum size of the voice message is set to 0, no fax messages are accepted.

Access requirements

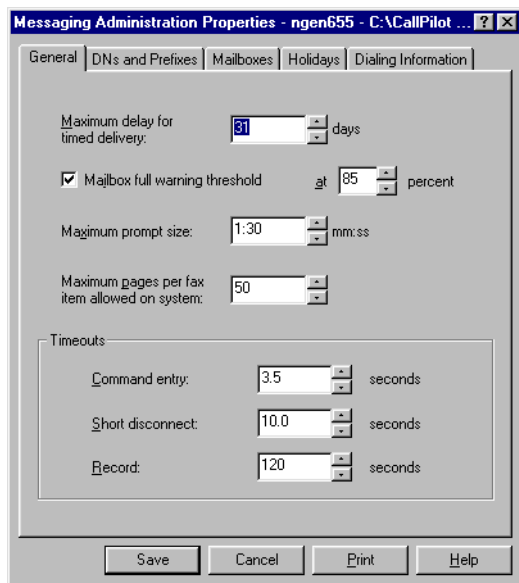
You must belong to an access class that grants Edit access to Messaging Administration.

See also

- information about maximum message length, hardware requirements, and associated software in the *Desktop Messaging Installation and Configuration Guide*

Getting there

CallPilot System > Messaging Administration > Messaging Administration > General tab



To specify the maximum number of pages in a fax

- 1 In the Maximum number of pages per fax item allowed on system box, type the maximum for any single fax item. CallPilot reinterprets this figure to determine the maximum number of seconds in a voice item.
- 2 When you finish configuring the messaging options, click Save.

Enabling multimedia mailbox capabilities

Introduction

Typically, users have one mailbox number that accepts both voice and fax messages. Users do not need a dedicated fax machine or fax DN. They just need to be assigned to a mailbox class that has fax capability enabled.

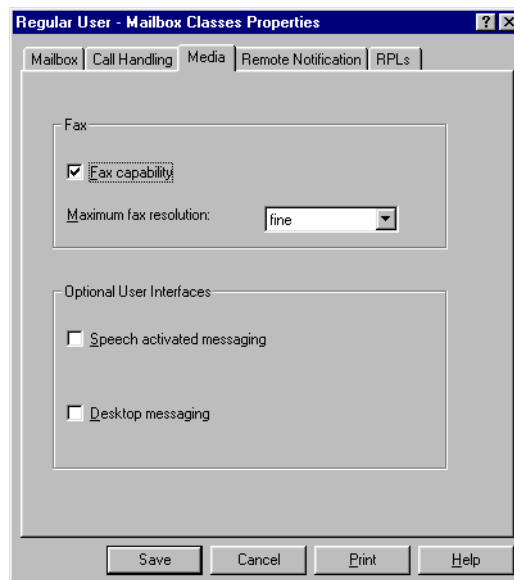
See also

- [“Express Fax Messaging” on page 198](#)
- information about hardware requirements and associated software in the *Desktop Messaging Installation and Configuration Guide*

Access requirements

You must belong to an access class that grants Edit access to Mailbox Classes.

Getting there CallPilot System > User Administration > Mailbox Classes > Media tab



To let group members receive fax messages in their mailboxes and print the faxes

- 1 Ensure the Fax capability check box is checked.
- 2 To let group members print fax messages from their mailboxes, select the quality of fax output from the Maximum fax resolution box.
- 3 When you finish configuring the mailbox class, click Save.

To enable speech recognition functionality for a mailbox class

- 1 Ensure the Speech activated messaging check box is checked.
- 2 When you finish configuring the mailbox class, click Save.

To let users view their messages from their PC desktops

- 1 Ensure the Desktop messaging check box is checked.
- 2 When you finish configuring the mailbox class, click Save.

Configuring the language for call answering voice prompts

Introduction

Call answering services are configured at the mailbox class level. The default for all supplied mailbox classes is to provide prompts in the primary language of the system.

Bilingual voice prompts

If callers are likely to use either a primary or secondary language, configure the mailbox class to play bilingual prompts. The caller hears the system prompts in the primary language and then in the secondary language.

Matching voice prompts to the recipient's preferred language

If callers are likely to use the language of the call recipient, configure the mailbox class to play prompts in the mailbox user's preferred language. When a caller dials a mailbox user who does not pick up the phoneset, the Call Answering service checks the user's property sheet for the preferred language. It plays all subsequent voice prompts in the specified preferred language.

See also

- [“Multilingual mailbox and answering services” on page 207](#)
- [“Relationship between mailbox classes and user creation templates” on page 279](#)
- [“Making system greetings bilingual” on page 242](#)

Access requirements

You must belong to an access class that grants Edit access to Mailbox Classes.

Getting there CallPilot System > User Administration > Mailbox Classes > Mailbox tab

Executive User - Mailbox Classes Properties

Mailbox | Call Handling | Media | Remote Notification | RPLs

Name: Executive User
Comment: Executive User

Storage

Voice storage limit: 20 minutes

☒ Delete read messages (voice): after: 14 days
☒ Delete read messages (fax): after: 14 days
☐ Block call answering when mailbox is full
☐ Retain copy of sent messages

☒ Revert DN set by telnet

Max composed message length: 15:00 mm:ss
Max call answering message length: 10:00 mm:ss

Language for callers: system primary
user's preferred
system primary
system dual language

Save Cancel Print Help

To provide bilingual voice prompts

- 1 In the Language for callers box, select System Dual Language.
- 2 When you finish configuring the mailbox class, click Save.

To provide callers with prompts in the recipient's preferred language

- 1 In the Language for callers box, select User's preferred.
- 2 When you finish configuring the mailbox class, click Save.

Making system greetings bilingual

Introduction

You can record global default system greetings in an alternate language. English is always the primary language.

Note: Users must request that the secondary language play as the greeting to their mailboxes.

Primary language example

“Welcome to the XYZ Corporation. Please leave a message at the sound of the tone or press 0 to be connected to an operator.”

Secondary language example

“Bienvenue à XYZ. Veuillez laisser un message après la tonalité ou faites le zéro pour communiquer avec la réception des appels.”

Access requirements

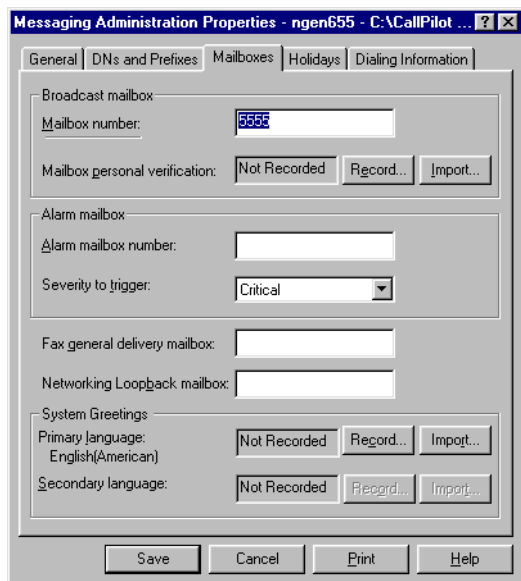
You must belong to an access class that grants Edit access to Mailbox Classes.

See also

- [“Configuring the language for call answering voice prompts” on page 240](#)
- [“Phoneset requirements for recording prompts” on page 59](#)
- [“Multilingual mailbox and answering services” on page 207](#)

Getting there

CallPilot System > Messaging Administration > Messaging Administration > Mailboxes tab



To record the secondary language greetings

Note: You can also import a WAV file that contains a recorded greeting. For instructions, see [“To import a WAV file” on page 192](#).

- 1 In the System Greetings area of the Messaging Administration Properties Mailboxes tab, beside Primary Language (or Secondary Language), click Record.
- 2 In the Specify Phoneset box, type the extension of the phoneset you use for recording.
- 3 Click OK.
- 4 When the phoneset at the specified extension rings, pick up the receiver and click Record.
- 5 At the sound of the beep, speak into the phoneset to record the greeting in the primary (or secondary) language.
- 6 Click Stop.
- 7 Click Disconnect, and hang up the phoneset.

Configuring the fax general delivery mailbox

Introduction

A fax general delivery mailbox provides a way for users with voice mailboxes to receive fax messages.

If a caller dials the Fax Express Messaging SDN and enters a mailbox with no fax capability, a voice message informs the caller that the mailbox cannot receive faxes and offers the fax general mailbox as a destination. The caller can either accept the transfer of the fax message or hang up.

To deposit a message directly into the fax general delivery mailbox, a caller must dial the Express Fax Messaging SDN from a faxphone.

Access to messages

Anyone who knows the fax general delivery mailbox password can access all fax messages sent to it. Typically, an administrator checks the mailbox periodically and distributes messages to individual recipients. You can also configure the fax general delivery mailbox to automatically print messages.

Privacy considerations and recommendation

The fax general delivery mailbox is like a system-wide bulletin board because all faxes sent to it are available to a large group of users.

Use the fax general delivery mailbox only for messages that do not contain proprietary or other confidential information. Users likely to receive confidential information must have fax capability.

Requirements

- An Express Fax Messaging SDN must be configured in the SDN Table with media type fax.
- The fax general delivery mailbox must be defined with fax capability enabled.

See also

- [“SDNs for fax services” on page 217](#)
- [“Adding an SDN” on page 221](#)
- [“To configure Express Voice Messaging or Express Fax Messaging” on page 226](#)
- [“Enabling multimedia mailbox capabilities” on page 238](#)

Access requirements

You must belong to an access class that grants Edit access to Messaging Administration.

Getting there CallPilot System > Messaging Administration > Messaging Administration > Mailboxes tab

The screenshot shows the 'Messaging Administration Properties' dialog box with the 'Mailboxes' tab selected. The 'Broadcast mailbox' section contains a 'Mailbox number' field with the value '6666' and a 'Mailbox personal verification' section with 'Not Recorded', 'Record...', and 'Import...' buttons. The 'Alarm mailbox' section contains an 'Alarm mailbox number' field and a 'Severity to trigger' dropdown menu set to 'Critical'. The 'Fax general delivery mailbox' field is highlighted with a black arrow. Below it is the 'Networking Loopback mailbox' field. The 'System Greetings' section contains 'Primary language' and 'Secondary language' fields, both set to 'Not Recorded', with 'Record...' and 'Import...' buttons. At the bottom are 'Save', 'Cancel', 'Print', and 'Help' buttons.

To set up a system-wide fax general delivery mailbox

- 1 In the Fax general delivery mailbox box, type the number of the mailbox that receives faxes whenever the recipient's mailbox is not fax capable.
- 2 When you finish configuring system-wide messaging options, click Save.

Configuring a fax mailbox for a group

Introduction

You can set up group fax mailboxes for customers with many voice channels and few fax channels.

In this scenario, make these assumptions:

- The majority of user mailboxes are not configured with fax capability because there are not enough fax channels to support the potential traffic.
- There are customer fax machines that serve groups of users.
- Mailbox users have the Express Fax messaging SDN as the fax number on their business cards. When callers dial the fax number, the system forwards the fax message to the fax-capable mailbox associated with the group fax machine. Users can access the group fax mailbox either through CallPilot Desktop Messaging Client or through the phoneset, by dialing the Express Fax Messaging DN.

Printing the faxes

Users who access the group fax mailbox via Desktop Messaging can send faxes to a printer. Those who access the mailbox via the phoneset can send faxes to a fax machine for printing.

Requirement

Each fax mailbox must be configured with fax capability enabled.

See also

- [“SDNs for fax services” on page 217](#)
- [“To add an SDN” on page 223](#)
- [“To configure Express Voice Messaging or Express Fax Messaging” on page 226](#)

Configuring a broadcast mailbox

Introduction

You can set up a DN that a caller can use to send a fax message to all users on the CallPilot system.

The number of channels that can be simultaneously allocated to deliver the fax is determined in its SDN setup:

- The minimum number of channels determines the number of channels guaranteed for broadcast message deliveries, regardless of how busy the system is.
- The maximum number of channels determines the number of channels that can be allocated to broadcast message deliveries at a time.
- A minimum setting of 0 means that no channels are guaranteed for this service.

In your DTF configuration, specify the minimum number of recipients required for a fax message to be considered a broadcast fax message.

Note: You might need to increase channel allocations for broadcast fax delivery. Because channel allocations for services are determined in a service's SDN definition, two separate outbound SDNs are assigned to the DTF service in the SDN Table. One is for Delivery to Fax and one is for Multicast Delivery to Fax.

See also

- [Chapter 11, “Creating and maintaining shared distribution lists”](#)
- [Chapter 22, “Managing channels \(M1 switch only\)”](#)

Access requirements

You must belong to an access class that grants Edit access to Messaging Administration.

Getting there

CallPilot System > Messaging Administration > Messaging Administration > Mailboxes tab

Messaging Administration Properties - ngen655 - C:\CallPilot ...

General | DNs and Prefixes | **Mailboxes** | Holidays | Dialing Information

Broadcast mailbox
Mailbox number: 6666
Mailbox personal verification: Not Recorded Record... Import...

Alarm mailbox
Alarm mailbox number:
Severity to trigger: Critical

Fax general delivery mailbox:
Networking Loopback mailbox:

System Greetings
Primary language: Not Recorded Record... Import...
Secondary language: Not Recorded Record... Import...

Save Cancel Print Help

To set up a system-wide broadcast mailbox

- 1 In the Broadcast mailbox Mailbox number box, type the number of the mailbox that is used for broadcasts.
- 2 *Optional:* Either record or import a personal verification for the broadcast mailbox.
- 3 When you finish configuring messaging options, click Save.

Chapter 19

Configuring outcalling services

In this chapter

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Configuring Delivery to Telephone and Delivery to Fax for a user group	255

Configuring Remote Notification service

Introduction

Remote Notification (RN) is an Outcalling service that notifies users of new messages that have been deposited into their mailboxes. Recorded messages that inform users that new messages exist can be sent to remote phonesets or pagers, as defined by the user or the administrator.

A notification might or might not include the message. If a notification is sent to a voice or alphanumeric pager, the new message can be played or displayed to the recipient.

To define RN rules for users added with a particular template, configure the RN options for the associated mailbox class.

Requirements

- The Remote Notification SDN must be defined in the SDN table.
- There must be a mailbox class to assign to each group of RN users.

Hours of operation can be restricted

Remote Notification can operate 24 hours a day, or only during certain times and certain days of the week, as desired.

See also

- [“To specify the user’s RN information” on page 173](#)
- [Chapter 17, “Making optional services available”](#)

Access requirements

You must belong to an access class that grants Edit access to Mailbox Classes.

Getting there

CallPilot System > User Administration > Mailbox Classes > Remote Notification tab

The screenshot shows the 'New Mailbox Classes Properties' dialog box with the 'Remote Notification' tab selected. The 'RN capability' is set to 'enable'. The 'Success criteria for notification' is set to 'Login'. The 'Telset access' checkbox is checked, and the 'New message notification only' checkbox is unchecked. The 'Retry limits and frequency' section contains a table with retry limits and intervals for 'Busy', 'No answer', and 'Answered' states. The 'Retry limit before RN stopped' is set to 5.

	Retry limit	Retry interval	hh:mm
Busy:	5	0:05	hh:mm
No answer:	10	0:05	hh:mm
Answered:	1	0:05	hh:mm

Retry limit before RN stopped: 5

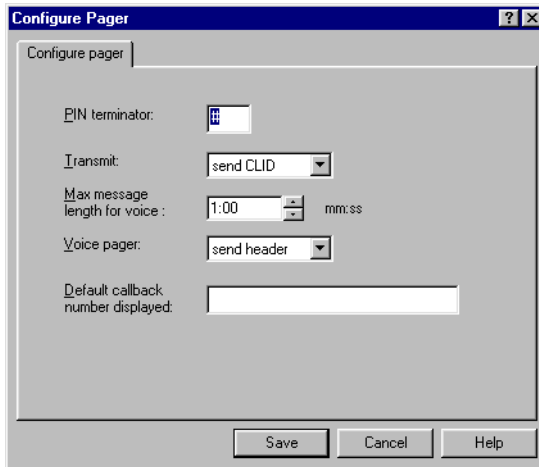
To set up Remote Notification for a user group

Note: You might need to finish configuring the user's RN schedule on an individual basis (see [“To specify the user's RN information” on page 173](#)), or users can finish the configuration using their phoneset.

- 1 To enable RN for mailbox class members, select Enable from the RN capability box.
- 2 To specify the circumstances under which the system stops RN, select a value from the Success criteria for notification list.
- 3 To let users administer their RN schedule from a phoneset, ensure there is a check mark in the Telset access check box.
- 4 To limit RN to new messages only, ensure there is a check mark in the New message notification only box.

To configure pagers for RN

- 1 To set up the options for pagers that receive RN, click Configure pager.



- 2 If the user must enter a special terminator character (such as #, to indicate that the PIN is completely entered), type that character in the PIN terminator box.
- 3 From the Transmit list, select the amount of information that the user group pagers can receive (notification only, CLID, or short voice message).
- 4 If the user group members have voice pagers:
 - a. Select the maximum amount of time for a message in the Max message length for voice box.
 - b. Select whether the pager gets the voice message, the header information, or both.
- 5 In the Default callback number displayed box, type the number that RN users must call to log on to the messaging system.
- 6 Click Save.

To define the retry strategy for remote notification failures

- 1 Use the Retry limits and frequency settings under the Remote Notification tab.

The screenshot shows the 'New Mailbox Classes Properties' dialog box with the 'Remote Notification' tab selected. The 'BN capability' is set to 'enable'. The 'Success criteria for notification' is set to 'Login'. The 'Iset access' checkbox is checked, and 'New message notification only' is unchecked. The 'Retry limits and frequency' section contains a table with three rows: 'Busy', 'No answer', and 'Answered'. Each row has a 'Retry limit' and a 'Retry interval' (hh:mm). The 'Retry limit before RN stopped' is set to 5.

	Retry limit	Retry interval	
Busy:	5	0:05	hh:mm
No answer:	10	0:05	hh:mm
Answered:	1	0:05	hh:mm

Retry limit before RN stopped: 5

- 2 Specify the retry strategy for calls that receive a busy signal:
 - a. In the Retry limit box, type or select the maximum number of times the system tries to resend a message if the target number is busy.
 - b. In the Interval box, type or select how long the system waits before retrying DTT when the target number is busy.
- 3 Specify the retry strategy for calls that receive no answer:
 - a. In the Retry limit box, type or select the maximum number of times the system tries to resend a message if the target number is busy.
 - b. In the Interval box, type or select how long the system waits before retrying DTT when the target number is busy.
- 4 Specify the retry strategy for calls that are answered but dropped before there is a voice response:
 - a. In the Retry limit box, type or select the maximum number of times the system tries to resend a message if the target number is busy.
 - b. In the Interval box, type or select how long the system waits before retrying DTT when the target number is busy.

- 5 In the Retry limit before RN stopped box, select the maximum number of remote notification cycles before the feature is disabled.
- 6 Click Save.

Configuring Delivery to Telephone and Delivery to Fax for a user group

Introduction

Configure Delivery to Telephone (DTT) for users who need to be able to compose and send voice messages to phonesets that do not have mailboxes defined on the system, such as those that are off-switch and on the public network (for example, phonesets used by employees who work at home).

Configure Delivery to Fax (DTF) service for users who need to send faxes to faxphones that are *not* defined as mailboxes on the system, including external faxphones.

Configuring DTT and DTF

When you specify dialing restrictions on DTT addresses, you are also specifying them on any DTF service that you configure. The tasks for setting up each service are nearly identical, and are typically done during the same session.

For a comparison of the tasks for setting up each service, see [“Task summary for setting up DTT and DTF services” on page 256](#).

DTT/DTF address prefixes and dialing codes

The addressing prefix tells the system that

- the numbers about to be entered constitute a DTT or DTF address
- the message is to be delivered to the address using the service

When a user composes a message, CallPilot assumes that the addresses entered are mailbox numbers. If an address does not correspond to a mailbox number, CallPilot must be able to determine that the DTT or DTF service is used to deliver the message instead of the Multimedia Messaging service. Otherwise, the message is not delivered and the user receives a nondelivery notification.

Task summary for setting up DTT and DTF services

DTT tasks	DTF tasks
<p>1. “To specify DTT playback options” on page 260</p> <p>Note: Playback can be activated when the recipient provides DTMF input to confirm playback or it can be voice-activated. DTT messages can be set to play either once or twice.</p>	<p>1. “To set the DTF broadcast threshold and time limit” on page 261</p> <p>Note: Broadcast faxes can have different channel allocations than regular faxes. The broadcast threshold determines how many recipients a fax must be addressed to before it is considered a broadcast fax.</p>
<p>2. “To set DTT and DTF delivery times” on page 262</p> <p>Note: Local laws might not permit delivery of machine-generated messages at certain times of the day. You are responsible for determining these times and ensuring that the allowed delivery time does not overlap with restricted hours.</p>	
<p>3. “To define a retry strategy” on page 263</p> <p>Note: The conditions that can lead to a delivery failure are listed on the Delivery to telephone tab of the Outcalling Administration dialog box. Define for each condition how often and up to how many times the system will try to resend a message if the first delivery attempt is unsuccessful.</p>	
<p>4. “To define address prefixes for both DTT and DTF” on page 264</p> <p>Note: Define the prefixes that users must enter when addressing messages to non-mailbox numbers. Define one prefix for each type of call you want to support (such as local and long distance). For each prefix, specify the dialing code (public network access code) that the switch requires to place the call. In most cases, make the prefix and the dialing code identical.</p>	
<p>5. “To test a DTT or DTF configuration” on page 265</p>	
<p>6. “To specify the user’s RN information” on page 173</p>	
<p>7. “To assign RPLs to features” on page 273</p>	

Guidelines for configuring DTT and DTF

When you configure DTT or DTF, consider the following requirements and recommendations.

Requirements

- To ensure that the DTT/DTF service is activated, you must define one or more dialing prefixes. Publish these prefixes so users can specify them during message composition and when entering addresses in distribution lists.
- For each DTT prefix, an associated dialing code must also be defined. When a user enters a DTT prefix, the system actually replaces the prefix the user entered with the associated dialing code. The dialing code is the public network access code that the system needs to place the call.
- DTT prefixes cannot conflict with mailbox numbers. If you have a controlled dialing plan (CDP), the prefix can be the same as the initial number(s) of a CDP steering code, but cannot be the same as the entire code. For example, if one of your steering codes is 566, 5 or 56 can be used as a DTT prefix, but 566 cannot be used.

For these cases, you need an arbitrary prefix that does not conflict with other numbers for the system to remove and replace with a dialing code to create a dialable number.

Synchronizing the DTT prefix and the dialing code

Make the DTT prefix and dialing code the same wherever possible. This simplifies message addressing for users because the numbers users enter when addressing a DTT message are exactly the same as the numbers they dial when placing an external call.

Example: If the public network access code for local calls is 9, define both the DTT prefix and the dialing code as 9. When a user enters a number such as 9555-2124 during message composition, the prefix 9 is removed and then replaced by the dialing code 9.

Prefixes for internal numbers

If you want to allow users to send DTT messages to internal extensions, you must set up a separate DTT prefix. This prefix is different, however, from others because it does not require an associated dialing code. Dialing codes are for access to the public network, and internal extensions are on your private network. When sending DTT messages to internal extensions, the prefix is simply stripped out of the address and the local extension is dialed. The prefix is simply needed to inform CallPilot to use the DTT service.

A DTT prefix for each dialing scenario

You need a DTT prefix and associated dialing code for each dialing scenario that you want to allow. This is because the system requires a different dialing code to place a call in each of the scenarios. For example, one dialing code (such as 9) is used to place local calls, whereas another (91) is used for long distance calls.

Dialing scenario	Example Prefix	Dialing code
Internal: For internal extensions	56*	none
ESN: For numbers on your private ESN network, if you have one	6	6
Local: For local numbers on the public network	9	9
Long distance: For long distance numbers in the same country code	91	91
International: For long distance numbers with different country codes	9011	9011

DTMF confirmation

You can specify whether DTMF confirmation is required either on a user-by-user basis or on a system-wide basis.

- If most users who receive DTT messages have rotary phonesets, disable DTMF confirmation for the entire system.
- If most users who receive DTT messages have answering machines, disable DTMF confirmation for the entire system.

- If users need to be able to send messages to a diversity of recipients, such as in different parts of the world where there might or might not be DTMF support, enable or disable DTMF confirmation at the user level.

Automatically repeating the message

- Some answering machine greetings contain a long pause, which might trigger the playback of the message before the greeting has finished. This means that the start of the DTT message will not be recorded since the greeting is still playing. Repeating the message makes it more likely that the entire message will be successfully recorded.
- People who do not have a lot of experience with automated delivery of machine-generated messages might not realize what is happening initially. Playing the message twice increases the chance that they will be able to listen to the content of the message.

Access requirements

To configure DTT or DTF, you must belong to an access class that grants Edit access to Outcalling Administration.

See also

- information about CallPilot Web Messaging, message addressing, message playback, hardware requirements and associated software in the *Desktop Messaging Installation and Configuration Guide*

Getting there

CallPilot System > Messaging Administration > Outcalling Administration > Delivery to telephone tab

The screenshot shows the 'Outcalling Administration Properties' dialog box with the 'Delivery to telephone' tab selected. The dialog has three tabs: 'Delivery to telephone', 'Delivery to fax', and 'Addressing'. The 'Delivery to telephone' tab contains the following settings:

- 'Require recipients to confirm message playback': A dropdown menu set to 'Accept user preference'.
- 'Number of times to play message to telephone': Two radio buttons, '1' and '2'. The '2' button is selected.
- 'Delivery time limit (stale time)': A time picker set to 36:00 hh:mm.
- 'Economy Delivery Time': A time range from 0:00 to 23:59.
- 'Define delivery times...': A button to open a secondary dialog.
- 'DTT Retries' section with a table:

	Retry limit	Interval
Busy	3	0:05 hh:mm
No answer	10	0:15 hh:mm
Answered (no confirmation)	0	0:00 hh:mm

At the bottom of the dialog are four buttons: 'Save', 'Cancel', 'Print', and 'Help'.

To specify DTT playback options

- 1 In the Require recipients to confirm message playback box, specify whether DTT message recipients are required to press a key to confirm they want to hear the message (All, None, or Accept user preference).
- 2 Specify the number of times to play the DTT message. Click 1 to play messages once, or 2 to play messages twice.
- 3 Either click Save or click another tab to continue to configure the DTT service.

Getting there

CallPilot System > Messaging Administration > Outcalling Administration > Delivery to fax tab

The screenshot shows the 'Outcalling Administration Properties' dialog box with the 'Delivery to fax' tab selected. The dialog has three tabs: 'Delivery to telephone', 'Delivery to fax', and 'Addressing'. The 'Delivery to fax' tab contains the following settings:

- Number of recipients required for broadcast:** 10
- Delivery time limit (stale time):** 36:00 hh:mm
- Economy Delivery Time:** from 0:00 to 0:00
- Define delivery times...** button
- DTF Retries:**

	Retry limit	Interval
Busy	3	0:05 hh:mm
No answer	10	0:15 hh:mm
No carrier	1	0:10 hh:mm
Transmit error	2	0:05 hh:mm

At the bottom of the dialog are four buttons: 'Save', 'Cancel', 'Print', and 'Help'.

To set the DTF broadcast threshold and time limit

- 1 In the Number of recipients required for broadcast box, type or select the minimum number of recipients to which a fax must be addressed before it is considered a broadcast fax.
- 2 In the Delivery time limit (stale time) box, type or select the amount of time that must elapse between a request to deliver a fax and the actual delivery before the fax becomes nondeliverable.
- 3 Either click Save or click another tab to continue to configure the DTF service.

Getting there

CallPilot System > Messaging Administration > Outcalling
Administration > Delivery to telephone or Delivery to Fax tab

The image shows two side-by-side screenshots of the 'Outcalling Administration' dialog box, specifically the 'Delivery Times' tab. The left window is titled 'Outcalling Administration - DTT' and the right window is titled 'Outcalling Administration - DTF'. Both windows have a 'Delivery Times' tab selected. Inside the tab, there is a table with two columns: 'Business Days' and 'Non Business Days'. Each column has radio buttons for each day of the week (Monday through Sunday). Below the table, there are two time range selectors: 'Delivery Time from:' and 'to:'. In the DTT window, the 'from' times are set to '0:00' and the 'to' times are set to '23:59'. In the DTF window, the 'from' times are set to '0:00' and the 'to' times are set to '0:00'. At the bottom of each window are 'Save', 'Cancel', and 'Help' buttons.

To set DTT and DTF delivery times

- 1 In the Delivery time limit (stale time) box, specify the duration of time that the system can attempt to deliver a message before it becomes nondeliverable.
- 2 Click Define delivery times to define the legally allowed delivery times for business days and nonbusiness days in your region.
- 3 In the Business Days column:
 - a. Select those days of the week that conform to normal business days in your region.
 - b. In the Delivery Time from box, type or select the time at which local laws allow message delivery to begin on business days.
 - c. In the Delivery Time to box, type or select the time at which message delivery must stop on business days.
- 4 In the Non Business Days column:
 - a. Select those days of the week that conform to nonbusiness days in your region.

- b. In the Delivery Time from box, type or select the time at which local laws allow message delivery to begin on nonbusiness days
 - c. In the Delivery Time to box, type or select the time at which message delivery must stop on nonbusiness days.
- 5 Either click Save or click another tab to continue to configure the DTT or DTF service.

To define a retry strategy

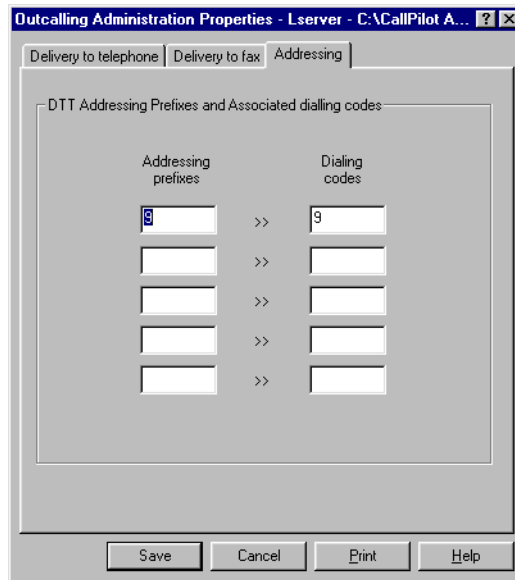
Note: For descriptions of the boxes used in this procedure, use the dialog box's field-level context-sensitive Help.

The image shows two screenshots of the 'Define delivery times...' dialog box. The left screenshot shows the 'DTT Retries' tab with settings for Busy (3 retries, 0:05 interval), No answer (10 retries, 0:15 interval), and Answered (no confirmation) (0 retries, 0:00 interval). The right screenshot shows the 'DTF Retries' tab with settings for Busy (3 retries, 0:05 interval), No answer (10 retries, 0:15 interval), No carrier (1 retry, 0:10 interval), and Transmit error (2 retries, 0:05 interval).

- 1 For each fax delivery failure condition, change the retry limit or retry interval, if necessary.
- 2 Click Save, or to continue to configure the DTT or DTF service, click another tab.

Getting there

CallPilot System > Messaging Administration > Outcalling Administration > Addressing tab



To define address prefixes for both DTT and DTF

- 1 Click the Addressing tab.
- 2 For each dialing scenario you want to support:
 - a. In the Addressing prefixes box, type the prefix that users must enter when addressing messages to non-mailbox numbers.
 - b. In the Dialing codes box, type the public network access code that the switch uses to place local, long distance, or international calls.
- 3 Either click Save or click another tab to continue to configure the DTT or DTF service.

To test a DTT or DTF configuration

Before you put Delivery to Telephone (DTT) or Delivery to Fax (DTF) into service for your users, test the service to ensure your configuration works. To test, do the following actions:

- Set up one mailbox class in which the service is enabled (the mailbox you use to test the service must belong to this mailbox class).
- Log on to a mailbox and address a few messages to non-mailbox numbers (such as your home number) to see if they are delivered.

For either service, DTT needs to be enabled in the mailbox class to which the mailbox you will use to test belongs. This involves

- enabling DTT in mailbox classes
DTT is not automatically enabled for all users on the system. You must identify the mailbox classes that service users that require DTT, and enable the service in those classes.
- assigning the appropriate RPL to DTT
Because both DTT and DTF can place calls outside your system, you must assign dialing restrictions that are appropriate for the mailbox class.

Chapter 20

Configuring RPLs for optional messaging features

In this chapter

Creating an RPL for a service	268
Assigning an RPL to a mailbox class	272
Assigning an RPL to an Application Builder application	274

Creating an RPL for a service

Introduction

Create special RPLs for any out-dialing feature or for any Application Builder application that has out-dialing blocks.

To be sure that you account for all out-dialing features, do the following actions:

- For Call Answering/Express Voice Messaging thru-dial, determine the dialing restrictions and permissions you want to apply to all mailbox users.
- When creating a new Application Builder application that includes thru-dial or fax callback capability, apply the RPL when you create the application.
- Apply RPLs to features on a mailbox class basis.

Guidelines for Mailbox Class RPLs

When you create an RPL, consult a list of the application users. Then

- for each mailbox class, determine which out-dialing features are needed by users in that class.
- for features users do not need, ensure all dialing codes are restricted (digits 0–9 should be defined as the restriction codes).
- for features users require, decide on the appropriate dialing restrictions and permissions for each feature.
- move users to other mailbox classes as required.

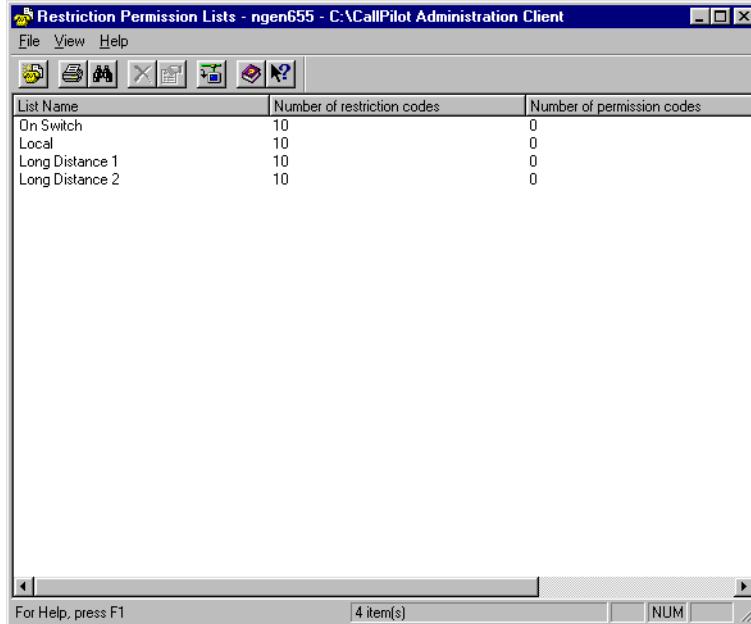
See also

- [“Assigning an RPL to a mailbox class” on page 272](#)
- [“Features that allow thru-dialing” on page 272](#)
- [“Assigning global restriction/permission lists” on page 69](#)
- [“Customizing supplied RPLs” on page 75](#)

Access requirements

You must belong to an access class that grants Create/delete access to Restriction Permission Lists.

Getting there CallPilot System > Messaging Administration > Restriction Permission Lists



List Name	Number of restriction codes	Number of permission codes
On Switch	10	0
Local	10	0
Long Distance 1	10	0
Long Distance 2	10	0

To create a new RPL

Note: Add a restriction code to specify the first digits of a number that is restricted from dialing. Then, add a permission code to allow exceptions to the restriction codes. For example, if 212 is a permission code and 21 is a restriction code, a call to 2125555555 is permitted.

- 1 On the File menu, choose New.

The screenshot shows the 'New RPL Properties' dialog box. It has a title bar with a question mark and a close button. The 'General' tab is selected. Inside the dialog, there are fields for 'List Name', 'Last Modified', and 'Comments'. Below these are two sections: 'Restriction' and 'Permission'. Each section has a text input box, 'Add' and 'Remove' buttons, and a list of digits 0-9. At the bottom are 'Save', 'Cancel', 'Print', and 'Help' buttons.

- 2 In the General dialog box, in the List name box, type a name that clearly identifies the function of the RPL.
- 3 If desired, use the Comments box to type in extra information describing the RPL's restrictions.
- 4 For each set of restriction and permission codes that you want to add:
 - a. In the Restriction codes box, type a number that callers might not use to call out (in this example, 12), then click Add.
 - b. In the Permission box, type a number that callers might use to call out that overrides the corresponding restriction code by adding an additional digit (in this example, 212), then click Add.

Note: You might need to add more than one permission code for a restriction code.

- 5 In the Restriction codes list, click on the number you want to remove.
Tip: To select multiple codes, hold the Ctrl button and click the other numbers you want to remove.
- 6 Click Remove.
- 7 In the Permission codes list, click the number you want to remove.
Tip: To select multiple codes, hold the Ctrl button and click the other numbers you want to remove.
- 8 Click Save.

Assigning an RPL to a mailbox class

Introduction

Apply RPLs to services that members of the mailbox class can use. Consider the calling requirements of the members and the restrictions needed for cost management and system security.

Features that allow thru-dialing

Assign a level of restrictions and permissions to system-wide features that allow external callers to thru-dial off the local switch.

These features include

- Call Answering/Express Voice Messaging thru-dial
- Mailbox Thru-Dialing
- Name Dialing and Name addressing by external callers
- External Call Sender
- Custom Revert
- Delivery to Telephone and Delivery to Fax
- AMIS Open Networking
- Remote Notification
- Fax Printing
- Application Builder services that include a thru-dial block

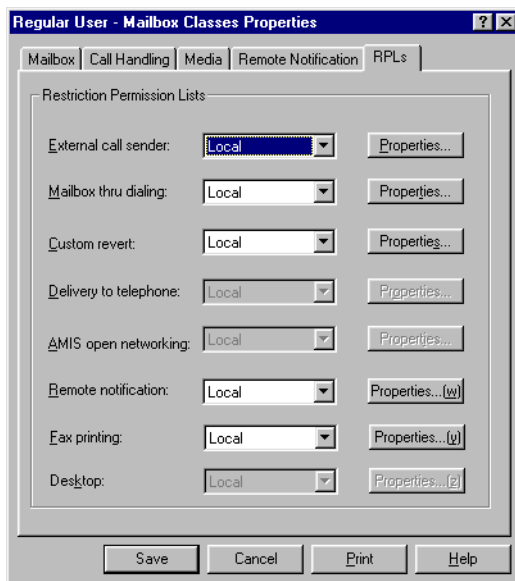
MSL-100 switch limitation

The MSL-100 switch transfers a thru-dialed call only after confirmation that the call is placed successfully. This confirmation can be either a ringback tone or the sound of a voice. This method of handling thru-dials allows the original caller to return to CallPilot when the transfer is not completed. Consequently, if the confirmation is voice, the first one or two words are missing from the message.

Access requirements

You must belong to an access class that grants Create/delete access to Mailbox Classes.

Getting there CallPilot System > User Administration > Mailbox Classes > RPLs tab



To assign RPLs to features

- 1 For each service that is enabled for the mailbox class:
 - a. Select an RPL.
 - b. Click Properties to verify the RPL configuration.
- 2 Click Save.

Assigning an RPL to an Application Builder application

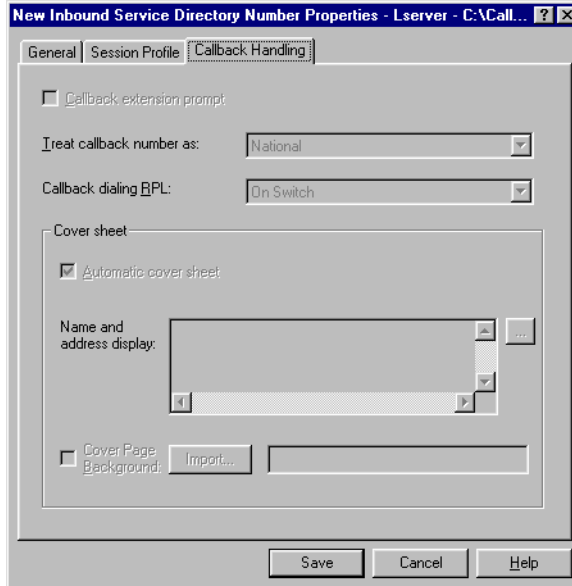
Introduction

Apply RPLs to the features defined in Application Builder. Consider the calling requirements of the members and the restrictions needed for cost management and system security.

Access requirements

You must belong to an access class that grants Edit access to Service Directory Number.

Getting there CallPilot System > System Administration > Service Administration > Service Directory Number > Callback Handling tab



To select the RPL to assign to an application

- 1** From the Callback dialing RPL box, select an RPL.
- 2** Click Save.

Chapter 21

Adding user creation templates

In this chapter

Overview of customer-specific templates	278
Creating a new user template	280
Cloning an existing template	282
Maintaining a set of user templates	284

Overview of customer-specific templates

Introduction

Your system already contains several prepackaged templates. The templates are named according to the types of users who require them. For example, the Executive template provides the most extensive messaging features and message storage capacity. You can use the prepackaged templates as they are, or you can customize the templates before you use them.

User creation template clones for user groups with special needs

The user population sometimes has members with special needs or equipment.

Examples

- Some users have offices in different branches; others do not.
- Some users have well-equipped home offices; others do not.
- Some users need to send messages over the public network; others do not.
- Some users send or receive volumes of faxes; others do not.
- Some users have PCs with multimedia capabilities; others do not.

User creation template clones for each additional volume

If, when using the AutoAdd feature, the administrator specifies the volume on which new users are stored, clone a user template for each volume to store users based on the original template.

Note: You can configure the template to automatically distribute new users across volumes.

User creation template clones for each administrator type

If you distribute CallPilot administrative responsibilities among a team of administrators, create a user template for each administrator type. As administrators are added to the system, the responsible administrator can apply the appropriate access class to the new administrator.

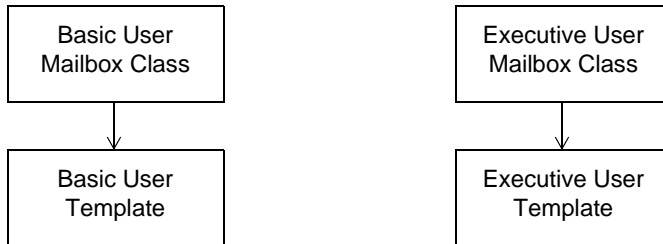
Relationship between mailbox classes and user creation templates

For the supplied mailbox classes and local mailbox user creation templates, there is a one-to-one correspondence between the two.

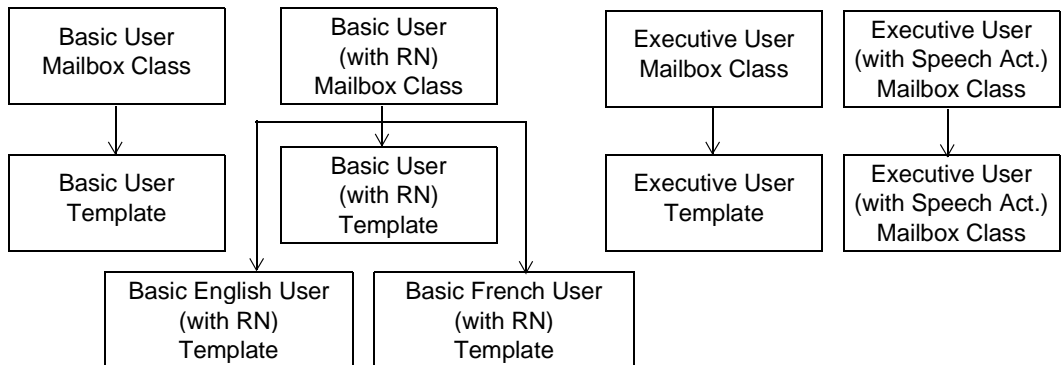
Examples

- Basic User mailbox class corresponds to the Basic User template.
- Executive User mailbox class corresponds to the Executive User template.

A graphical representation looks like this:



As the system develops, the user population changes, and mailbox classes and user templates are cloned and created, the graphical representation looks more like this:



See also

- Chapter 8, “Controlling access to administration programs”
- “Adding a group of users all at once” on page 104
- “Changing access to administrative programs” on page 159

Creating a new user template

Introduction

To create a new template without copying and modifying an existing template, you need to

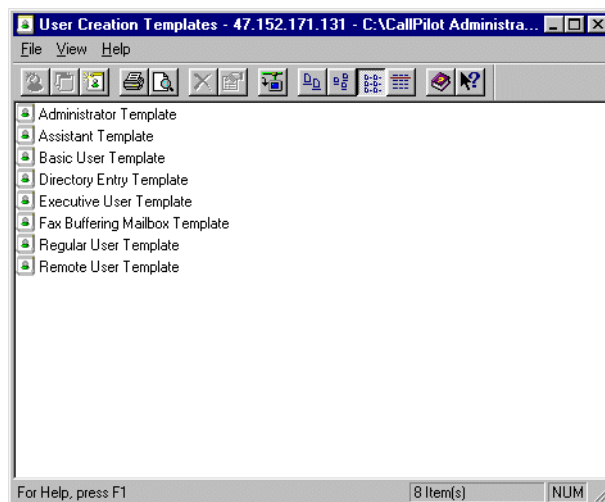
- name the template
- assign an access class to the template, if the user has administrative capability
- specify the user type's title
- specify the user type's department

Note: You can create user templates only if you have Create/Delete access to the User Creation Templates program.

Access requirements

You must belong to an access class that grants Create/delete access to User Creation Templates.

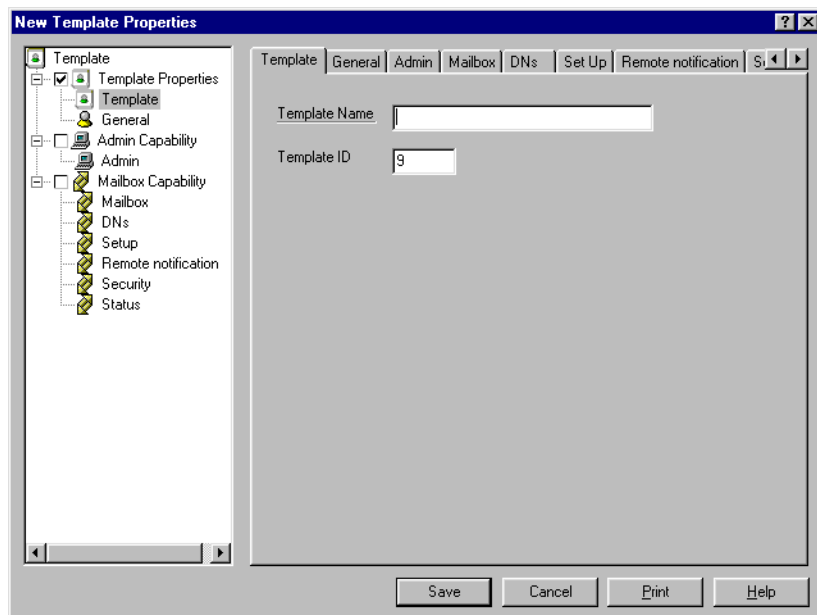
Getting there CallPilot System > User Administration > User Creation Templates



To create a new user template

- 1 On the File menu, choose Create New Template.

Result: A blank New Template Properties sheet appears.



- 2 Under the template tab, in the Template Name box, type the template name.
- 3 Click the General tab.
- 4 If the user group is based on job function, type the job title in the Title box.
- 5 If the user group is based on business unit, type the department name in the Department box.
- 6 If the template is to create a group of administrators:
 - a. Click the Admin tab.
 - b. Check the Admin Capability item in the tree list if it is not checked.
 - c. From the Access Class list, select the access class you want to assign to this template.
 - d. If you want to prevent user group members from accessing the desktop, click the Lock out button.
- 7 Click Save.

Cloning an existing template

Introduction

Create templates quickly and easily by basing your new template on an existing one. The properties of the existing template are transferred to the new one. You can then edit the general information stored in the template, or assign a different access class to the template, or both.

ATTENTION

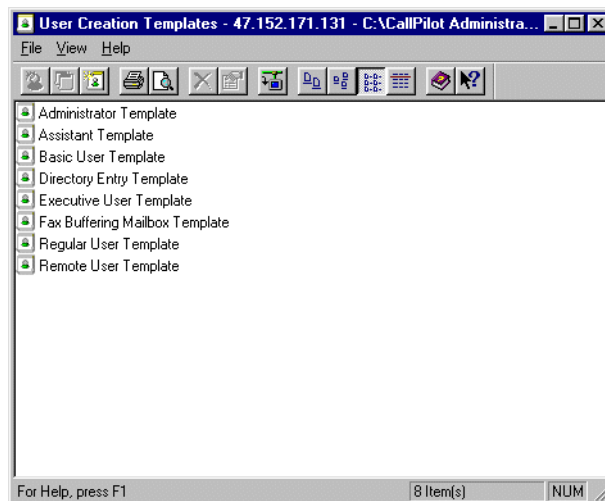
To change a template, you must open the template properties sheet.

When you double-click a template name to open it, you are adding a new member to the user group.

Access requirements

You must belong to an access class that grants Create/delete access to User Creation Templates.

Getting there CallPilot System > User Administration > User Creation Templates



To clone an existing template

- 1 In the Templates list, select a template that is similar to the new one.
- 2 On the File menu, choose Duplicate.
- 3 Click the Template tab if it is not open.
- 4 In the Template Name box, type a name for the template.
- 5 To change the default ID number assigned to the template, type the new ID number in the Template ID box.
- 6 Verify that the Admin Capability item in the tree list is checked *only* if the template is to create users with administrative rights.
- 7 If the template is to create a group of administrators
 - a. Click the Admin tab.
 - b. From the Access Class list, select the access class you want to assign to this template.
 - c. If you want to prevent user group members from accessing the desktop, click the Lock out button.
- 8 Click Save.

Maintaining a set of user templates

Introduction

When you maintain a set of user templates, you must keep records and delete obsolete templates from the system.

Access requirements

To view or print user template properties, you must belong to an access class that grants View access to User Creation Templates.

To delete a user template, you must belong to an access class that grants Create/delete access to User Creation Templates.

Template documentation

Print a hard copy of the following reports for your records:

- the template name and ID of one template
- a list of template names and IDs for all defined templates
- a detailed list of all properties of each template

Deleting a user template

When you delete a template, you do not delete the users who were created from that template.

See also

- “Deleting a user or directory entry” on page 193

Chapter 22

Managing channels (M1 switch only)

In this chapter

Multimedia services and M1 channels	286
Allocating channels to services	291
Disabling a service	294

Multimedia services and M1 channels

Introduction

If your CallPilot system is connected to an M1 switch, it can use functions provided only by the Application Module Link (AML). Use these functions to change channel allocations to services based on current usage.

The way you allocate channels depends on several factors, such as how much traffic you expect the service to generate and the importance of the service.

Third-party switches

If your CallPilot system is connected to a third-party switch, you can limit the number of channels available to a service, but you cannot reallocate a channel to a service using a different media type.

Supported third-party switches use hunt groups for resource allocation. For more information, see the *Software Installation and Configuration Guide* for your server.

Total number of channels

The total number of channels available for any CallPilot system is keycode-controlled. If you need more channels, upgrade your CallPilot server.

Default channel allocations

By default, CallPilot allocates channels to services dynamically, based on available channel resources. For many systems, this default configuration works very efficiently.

The default minimum

The minimum number of channels allocated to each service is zero. This means that services are not guaranteed access to any channels. Other services are allowed to use up all of the channels of a particular type (such as fax), leaving no available channels.

Example: A Fax on Demand service has no guaranteed channels (minimum is zero). All fax channels on the system become busy due to the traffic generated by other fax services. A call in to the Fax on Demand service is queued until a fax channel becomes idle.

The default maximum

By default, the maximum number of channels that a service can use at any one time (by default) is all channels of the required type.

Example: Four fax channels are on your system. A burst of traffic is directed at a particular Fax on Demand service. Because all four channels are idle, this service is allowed to use all four channels simultaneously, leaving no channels available to other fax services.

Guaranteeing a minimum number of channels

For certain critical services, you can guarantee a certain minimum number of channels. The specified number of channels is always reserved for the service and cannot be used by other services.

Note: This method of allocating channels is not recommended for a large number of services, since it can reduce the overall efficiency of your system.

Restriction

The total number of minimum channel settings for all your services must be less than the total number of channels assigned to that media type.

Example

If you allocate a minimum of two fax channels to Delivery to Fax (service, at least two fax channels is always available to the Delivery to Fax service. The number of fax channels available to the other fax services is reduced by two.

Limiting the number of channels used by a service

Instead of allowing a service to use up all channels of a particular type, you can place a limit on how many channels a service can use simultaneously.

Example

There are four fax channels on your system. For a particular Fax on Demand service, you change the default setting to two. The service can now use no more than two fax channels simultaneously, even if the other two fax channels are idle.

Example: Allocating and reallocating channel resources

A new voice menu application is put into service. This menu informs company employees of the new benefits plan, and is expected to generate heavy traffic during the first month it is used.

Your system has 18 voice channels. For the first month of service, you allocate a minimum of two channels and a maximum of four channels to the voice menu.

After one month, when the amount of traffic generated by the service decreases, you reduce the minimum number of channels to zero and the maximum to two.

Note: A minimum setting of zero means that the service is not guaranteed any channels. If all voice channels are busy, that service cannot obtain a channel until there is an idle channel.

Allocations for Application Builder services with fax callback

If the session profile for an Application Builder service allows fax callback delivery, the channel allocations assigned to the service's SDN are not used. Instead, the channel allocations assigned to the Delivery to Fax SDN are used, because the Delivery to Fax service delivers faxes on a callback.

Allocations for speech recognition services

Speech recognition channels use four times the processing power of multimedia channels.

Estimating service requirements

Use the guidelines in the *Planning and Engineering Guide* to estimate the number of channels a service needs. Then monitor actual service usage using Reporter to see if you need to adjust the channel allocations.

Reporter reports

The Reporter utility provides predefined reports to help you monitor service usage and performance.

System status reports

Run the following reports to view statistics for each channel type. These reports include data such as the number of callers who waited for a channel and the number of callers who abandoned their calls.

- Service Quality Summary report
- Service Quality Detail report
- Channel Usage report

Traffic reports

Run the System Traffic Summary report to identify how much particular services are used. For example, you can identify the percentage of total traffic generated by a service. This gives you an idea of whether the current channel allocations for that service are adequate.

Outcalling reports

Run the following reports to determine if outcalling services are able to acquire channels when needed. You can view the average and maximum times that each service had to wait to acquire a channel.

- DTT Activity report
- Fax Deliveries Activity report
- Fax on Demand Audit Trail Detail report
- Fax Print Audit Trail Detail report
- RN Activity report
- RN Audit Trail Detail report

Networking reports

If any AMIS or VPIM Networking services are installed, you can run the Open Networking Activity report. A high number of blocked sessions means that the service cannot acquire channels to complete calls.

See also

- information about managing channels in *Monitoring and Security for the Administrator*
- information about channel usage reports in *Reporter Guide*

Allocating channels to services

Introduction

If your telephony services are provided by an M1 switch, you can change the minimum number of channels guaranteed for a service if traffic generated by the service is greater than originally anticipated.

Restrictions on editing outbound SDNs

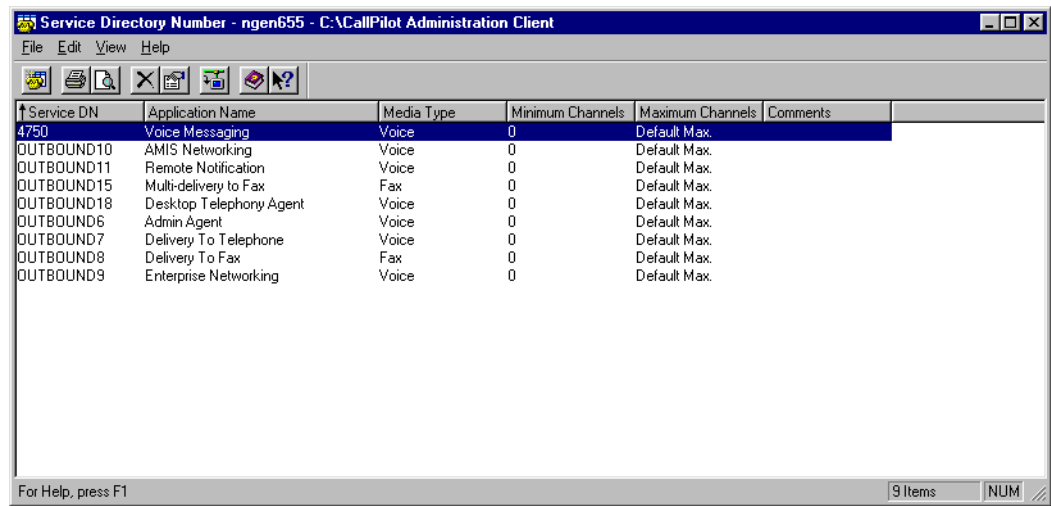
Outbound SDNs are automatically created by the system during installation, and there are certain things that you cannot change. You cannot

- create or delete an outbound SDN
 - rename an outbound SDN
 - change the actual Service DN
- Note:** This number is specific to each service and is automatically assigned.
- modify the session profile or callback handling properties

Access requirements

You must belong to an access class that grants Edit access to Service Directory Number.

Getting there CallPilot System > System Administration > Service Administration > Service Directory Number



Service DN	Application Name	Media Type	Minimum Channels	Maximum Channels	Comments
4750	Voice Messaging	Voice	0	Default Max.	
OUTBOUND10	AMIS Networking	Voice	0	Default Max.	
OUTBOUND11	Remote Notification	Voice	0	Default Max.	
OUTBOUND15	Multi-delivery to Fax	Fax	0	Default Max.	
OUTBOUND18	Desktop Telephony Agent	Voice	0	Default Max.	
OUTBOUND6	Admin Agent	Voice	0	Default Max.	
OUTBOUND7	Delivery To Telephone	Voice	0	Default Max.	
OUTBOUND8	Delivery To Fax	Fax	0	Default Max.	
OUTBOUND9	Enterprise Networking	Voice	0	Default Max.	

To allocate channels for inbound or outbound services (M1 switch only)

- 1 Either create a new SDN or open an existing one.

New Inbound Service Directory Number Properties - 47.152.171.131 ... ? X

General Session Profile Callback Handling

Service DN:

Application

Application ID:

Application Name:

Multimedia Channels and Media

Media Type:

Minimum Channels:

Maximum Channels: ☒ Use Default Maximum

Comments:

Save Cancel Help

- 2 Specify how you want the system to allocate resources:
 - To allow the system to allocate channels based on available resources, make sure the Use Default Maximum box is checked and leave the Minimum channels setting at 0.
 - To guarantee that the service has access to a certain number of channels at any time, type this number in the Minimum Channels box.
 - To limit how many channels the service can use simultaneously to a specific number, make sure the Use Default Maximum box is not checked. In the Maximum Channels box type the maximum number of channels the service can use at any one time.
- 3 Either click Save or continue configuring the SDN.

Disabling a service

Introduction

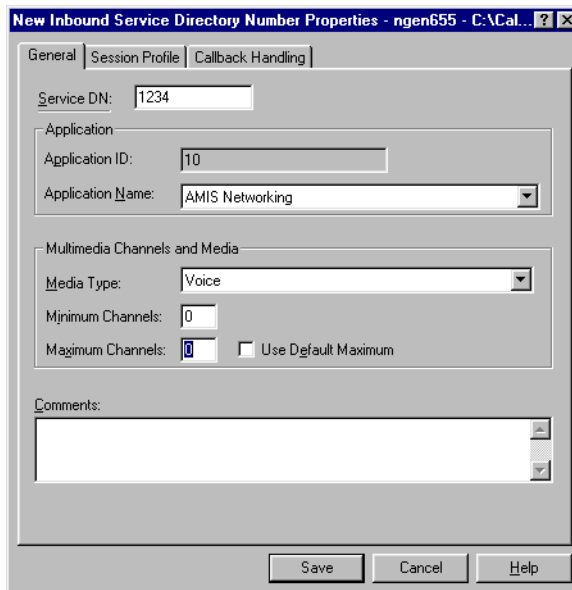
If your CallPilot server is connected to an M1 switch, you can temporarily disable a service by allocating no channels to it. When you wish to reenable the service, you do not need to reconfigure its session profile and other parameters.

Note: If your telephony services are provided by a switch other than the M1, you cannot temporarily disable a service.

Access requirements

You must belong to an access class that grants Edit access to Service Directory Number.

Getting there CallPilot System > System Administration > Service Administration > Service Directory Number > General tab



The screenshot shows a Windows-style dialog box titled "New Inbound Service Directory Number Properties - ngen655 - C:\Cal...". It has three tabs: "General", "Session Profile", and "Callback Handling", with "General" selected. The "General" tab contains the following fields and controls:

- Service DN:** A text box containing "1234".
- Application:** A group box containing:
 - Application ID:** A text box containing "10".
 - Application Name:** A dropdown menu showing "AMIS Networking".
- Multimedia Channels and Media:** A group box containing:
 - Media Type:** A dropdown menu showing "Voice".
 - Minimum Channels:** A text box containing "0".
 - Maximum Channels:** A text box containing "0".
 - ☐ Use Default Maximum
- Comments:** A large text area with a vertical scrollbar.

At the bottom of the dialog are three buttons: "Save", "Cancel", and "Help".

To temporarily disable a service (M1 switch only)

Set both the maximum and minimum number of channels to zero.

Result: The Fax Buffering Mailbox template appears.

The screenshot shows the 'New User Properties' dialog box. The 'General' tab is active. On the left, a tree view shows the hierarchy: User > User Properties > General. The right side of the dialog contains several text input fields: 'First name:', 'Initial(s):', 'Last name:', 'Comments:' (a larger text area), 'Title:', and 'Department:'. At the bottom of the dialog are four buttons: 'Save', 'Cancel', 'Print', and 'Help'.

- 1 In the First name box, type the user's first name.
- 2 In the Last name box, type the user's last name.
- 3 In the Comments box, type any additional information about the user.
- 4 Click the Mailbox tab.
- 5 In the Mailbox number box, type the extension DN of the fax machine.
- 6 Click the Set Up tab.
- 7 In the Default Printing DN box, type the extension DN of the fax machine.
- 8 If a prefix (for name dialing and name addressing) is not assigned in Messaging Administration, click the Security tab and assign a password.
- 9 Click Save.

Chapter 23

Configuring remote administration of the server

In this chapter

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Section B: Establishing a dial-up connection to the server	309
Section C: Performing remote tasks using pcANYWHERE32	315

Overview of remote administration via pcANYWHERE32

Introduction

This chapter describes the following tasks:

- how to set up an administrative PC with pcANYWHERE32 software to perform remote administration tasks on a server
- how to establish a dial-up connection to a CallPilot server
- how to use pcANYWHERE32 to control the connected CallPilot system from a remote or local administrative PC

In this chapter, a remote support PC or a local PC used to administer or access the server is referred to as an administrative PC.

ATTENTION

Do not schedule intensive remote tasks during peak call traffic hours. This can adversely affect call processing capabilities of the server.

Establishing a network connection with the server from a remote PC

Administrative PCs that are not on the same LAN as the server must use Dial-Up Networking (DUN) to connect to the server. Remote Access Service (RAS) must be installed and configured on the server.

Dial-Up Networking software is usually installed during the Windows NT 4.0, Windows 95, or Windows 98 initial installation. If the Dial-Up Networking folder does not appear in the My Computer window, the software is not installed. Refer to your Windows documentation for a Dial-Up Networking installation procedure.

RAS is installed on the CallPilot server at the factory. RAS is configured on-site as part of the Configuring Windows NT procedures.

A dial-up connection enables the remote administrative PC to appear as if it is on the same LAN as the server, and allows you to

- perform limited file transfers from the administrative PC to the CallPilot system
- perform administration on the CallPilot server using CallPilot Administration Client on the administrative PC
- attempt to establish a pcANYWHERE32 remote control session over a modem link

Section A: Configuring pcANYWHERE32 on a PC

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Overview of pcANYWHERE32

Introduction

You can use pcANYWHERE32 to perform advanced administrative tasks on a connected CallPilot server. You can control the CallPilot server as though you were directly connected to it.

One licensed copy of pcANYWHERE32 Version 8.0 is provided for the server on the CallPilot server software CD. pcANYWHERE32 is installed on the server at the factory.

To install pcANYWHERE32 Version 8.0 on the administrative PC, you must purchase a separate license for the administrative PC.

When to use pcANYWHERE32

Remote control (using pcANYWHERE32) lets administrators and Nortel Networks customer support representatives perform advanced administrative actions, such as

- querying the server event logs
- shutting down or restarting the server
- using server-only support tools
- applying PEPs

System requirements for the administrative PC

- Windows NT 4.0, Windows 95, or Windows 98 operating system
- Dial-Up Networking (DUN) if connecting over the Public Switch Telephone Network (PSTN); DUN is normally included on Windows PCs
- pcANYWHERE32 (must be purchased for the administrative PC)

See also

- information about preparing the server for remote access with pcANYWHERE in the *Software Installation and Configuration Guide*

Installing pcANYWHERE32 on the administrative PC

Introduction

Nortel Networks does not provide a pcANYWHERE32 license for an administrative PC.

Before you install pcANYWHERE32 on an administrative PC, purchase a separate license from the pcANYWHERE32 vendor.

Steps for installing pcANYWHERE32

To complete the installation and initial setup of pcANYWHERE32 on the administrative PC, you must follow the steps in the following procedures:

- [“To install pcANYWHERE32 on the administrative PC” on page 303](#)
This procedure installs the software on the administrative PC.
- [“To start pcANYWHERE32 for the first time” on page 304](#)
This procedure identifies the network protocol.
- [“To set the video mode” on page 305](#)
This procedure synchronizes the video card settings of the administrative PC with that of the CallPilot server. This ensures that the remote user can see the graphical user interfaces properly.

To install pcANYWHERE32 on the administrative PC

- 1 Log on as Administrator.
- 2 Insert the MAS Operating System CD in the CD-ROM drive.
- 3 Run the cdinst.exe program on the CD-ROM to start the installation.
- 4 Click the Install Software button.
Result: The Welcome window appears.
- 5 Click Next.

Result: The User Information window appears.

- 6 Enter both the user and the company names, then click Next.

Result: The Online License Agreement window appears.

- 7 Click Yes to accept the software license agreement.

Result: The Choose Destination window appears.

- 8 Click Next until you get to the Registration Wizard screen.

- 9 Click Skip.

Result: The pcANYWHERE32 Setup window appears. The system asks whether you want to view the readme file.

- 10 Click No.

- 11 Select Yes to restart the computer, then click Finish.

To start pcANYWHERE32 for the first time

- 1 Click Start > Programs > pcANYWHERE32 > pcANYWHERE.

Result: The Smart Setup Wizard window appears.

- 2 Click Next.

Result: The Network Device window appears.

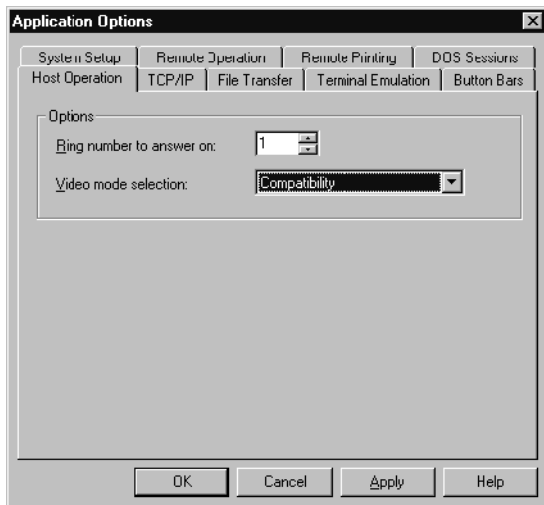


- 3 Ensure only TCP/IP is selected, then click Next.

- 4 Select Finish.

To set the video mode

- 1 In pcANYWHERE32, select Application Options from the File menu.
- 2 Select the Host Operation tab.



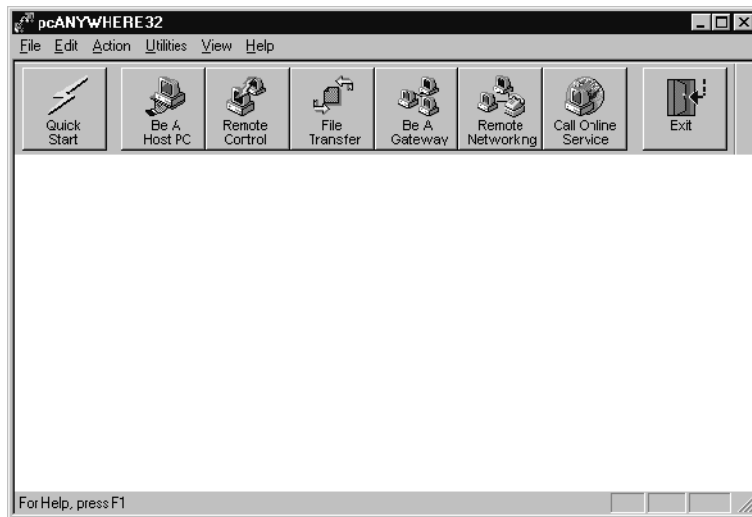
- 3 Click the Video mode drop-down list to change from the default setting to Compatibility.
- 4 Click Apply.
- 5 Click OK to exit.

Configuring pcANYWHERE32 on the administrative PC

Introduction

You must create a remote control connection icon in pcANYWHERE32 that allows you to connect to the server. Configure other options on pcANYWHERE32 as required by the customer.

Getting there Windows Start > Programs > pcANYWHERE32 > pcANYWHERE



To create a remote control connection icon

- 1 Select Remote Control.
- 2 Double-click the Add Remote Control icon.
- 3 Create a new pcANYWHERE32 connection profile using the following parameters:
 - a. Assign a profile name.
 - b. For the connection device, select TCP/IP. Do not select a modem.

- c. If the administrative PC is connecting to the server via a CLAN or ELAN card, enter the CallPilot CLAN or ELAN IP address as the Host PC Name.
 - d. Clear the check box for Automatically begin remote control session upon wizard completion field, then click Finish.
- 4 Right-click the new remote control connection icon, then select Properties.
- 5 Under the Setting tab, increase the Number of connection attempts to a value higher than zero.
- 6 Under the Security Options tab, ensure that pcANYWHERE encryption is selected (this is the default).
- 7 All other fields are optional. Set as required for the customer, or leave at default values.
- 8 Click OK.

What's next?

If you are using pcANYWHERE32 on a remote administrative PC, then continue with [Section B: "Establishing a dial-up connection to the server," on page 309](#).

If you are using pcANYWHERE32 on a local administrative PC (that is, the PC is on the same LAN as the server), then continue with [Section C: "Performing remote tasks using pcANYWHERE32," on page 315](#).

Section B: Establishing a dial-up connection to the server

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Establishing a connection using Dial-Up Networking	313

Overview of the dial-up connection

Introduction

This section provides procedures for creating a dial-up networking connection profile for connecting a remote administrative PC to the server.

Once you have established a network connection with the server, the remote administrative PC can behave as though it is on the same LAN as the server. You can either launch a CallPilot system or use pcANYWHERE32 to control the server.

See also

- [Chapter 6, “Configuring mailbox security”](#)

Creating the Dial-Up Networking connection profile

Introduction

The Dial-Up Networking software enables you to establish a connection between the server and administrative PC over the public switch telephone network (PSTN).

A Dial-Up Networking connection profile contains the connection information required for the remote administrative PC to connect to the server. This is not required for administrative PCs that are on the same LAN as the server. When a connection profile is created, an icon representing the connection profile appears in the Dial-Up Networking folder.

Before you begin

Dial-Up Networking must be installed

Dial-Up Networking software is installed during the Windows NT 4.0, Windows 95, or Windows 98 setup and is usually present on PCs that have a standard setup.

If the Dial-Up Networking folder does not appear in My Computer, it is not installed. Refer to your Windows documentation for a Dial-Up Networking installation procedure.

What you need

To create a server Dial-Up Networking connection profile, you must have the following information:

- the server telephone number
- the server IP address

If you do not know this information, contact the system administrator.

To create a server connection profile (for Windows 95 or 98 administrative PC)

- 1 Click Start > Programs > Accessories > Dial-Up Networking.

Result: The Make New Connection wizard appears.

Note: If connections have been created previously on this administrative PC, click the Make New Connection icon in the Dial-Up Networking window to display the wizard.

- 2 Enter a name for the connection and select a modem. You do not need to configure the profile at this time.
- 3 Click Next.
- 4 Enter the server telephone number, then click Next.
- 5 Click Finish.
- 6 Continue with "[To configure a connection profile](#)" below.

To configure a connection profile

- 1 Right-click the server connection profile icon, then select Properties.
- 2 Enter the telephone number of the server if it is not already present or if it is incorrect. Make any other changes on this window if required.
- 3 Click Configure.
- 4 Update the tabs as required, then click OK.
- 5 Click Server Settings.
- 6 For Dial-Up Server, select PPP:Windows NT.
- 7 For the network protocols, select only TCP/IP and NETBEUI.
- 8 Click TCP/IP settings.
- 9 Select Specify an IP address, and enter the server IP address.
- 10 Select Use default gateway on remote network.
- 11 The remaining fields are optional. Fill them in as required for the customer's network.
- 12 Click OK.

Establishing a connection using Dial-Up Networking

Introduction

Administrative PCs that dial in over the PSTN must establish a dial-up connection with the server. If the administrative PC and server are on the same LAN, then the procedures in this section are not required.

Before you begin

- Ensure that you have created a server connection profile. See [“Creating the Dial-Up Networking connection profile” on page 311](#).
- You might need a user ID and password to log on to the customer’s network. Contact the customer to obtain this information.
- If you are using pcANYWHERE32, you need the password for a remote access user account and pcANYWHERE32 caller account on the server (for example, the NGenDist user account and pcANYWHERE32 NGenDist caller account).

To establish a connection to the server

- 1 Log on to the administrative PC.
- 2 Click Start > Programs > Accessories > Dial-Up Networking.
- 3 Double-click the server connection profile icon.
Note: If the icon is unavailable, you have not created a server connection profile. See [“Creating the Dial-Up Networking connection profile” on page 311](#).
- 4 If prompted for a user ID and password, enter the user ID and password to log on to the customer’s network.
- 5 Wait until the connection is established.

To disconnect a dial-up connection

- 1 Right-click the icon on the toolbar
- 2 Click Disconnect.

What's next?

After the connection has been made, you can do the following tasks:

- Launch a CallPilot system to access the CallPilot Administration Client window.
- Use pcANYWHERE32 to control the server to perform any administrative task. See [“Controlling the server using pcANYWHERE32” on page 317](#).
- Restart the server. See [“Restarting the server remotely” on page 319](#).

Section C: Performing remote tasks using pcANYWHERE32

In this section

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Controlling the server using pcANYWHERE32	317
Restarting the server remotely	319
Restarting the server remotely without using pcANYWHERE32	320

Overview of remote control of the server

Introduction

This section describes how to log on to the server using pcANYWHERE32. Once you have logged on, you can control the server as though you were sitting at a keyboard connected directly to it.

If the server is powered off, you cannot establish a connection with the server. Someone at the server's location must turn on the server.

Testing the connection if the administrative PC is on the server's LAN

If the administrative PC is on the same LAN as the server, then you do not need to establish a dial-up connection.

Test the network connection to the server's CLAN or ELAN card, depending on whether the administrative PC is connecting to the server over the CLAN or ELAN.

- 1 Open up a DOS prompt and type ping "XX.XX.XX.XX" where XX.XX.XX.XX is the IP address of the CLAN or ELAN card on the server.
- 2 If it is successful, then a connection has been established. Otherwise, check the cabling and the administrative PC's TCP/IP configuration information.

Controlling the server using pcANYWHERE32

Introduction

You can use pcANYWHERE32 to operate the server as if you were directly connected to it.

Before you begin

- If the server is not on the same LAN as the administrative PC, then establish a dial-up connection. See [“Establishing a connection using Dial-Up Networking” on page 313](#).
- You need the password for a remote access user account and pcANYWHERE32 caller account on the server (for example, the NGenDist user account and pcANYWHERE32 NGenDist caller account)

Remote tasks

Once a pcANYWHERE32 session is successfully established, you can take direct control of the server to

- query the server event logs
- shut down or restart the server
- use server-only support tools
- apply PEPs
- perform other advanced administration activities

To control the server using pcANYWHERE32 on the administrative PC

- 1 If you are dialing in over the PSTN, establish a dial-up connection (see [“To establish a connection to the server” on page 313](#)).
- 2 Click Start > Programs > pcANYWHERE32 > pcANYWHERE.
- 3 Double-click the remote control icon for the server.

Note: If the icon is unavailable, see [“To create a remote control connection icon” on page 306](#).

- 4 When prompted, enter the pcANYWHERE32 logon ID and password.

To end a pcANYWHERE32 remote control session

- 1 To log off the server, press Ctrl+Alt+Del on the administrative PC and select Logout.
- 2 Disconnect the pcANYWHERE32 connection.
- 3 If applicable, disconnect the Dial-Up Networking connection.
 - a. Right-click the icon on the toolbar.
 - b. Click Disconnect.

Restarting the server remotely

Introduction

You might need to restart the server from a remote location if the system goes down or if you need to run startup diagnostic tests.

Restarting the server using pcANYWHERE32

If pcANYWHERE32 is installed, then establish a remote control session and restart the server using the Start > Shutdown option. See [“Controlling the server using pcANYWHERE32” on page 317](#).

Restarting the server when pcANYWHERE32 is not available

See [“Restarting the server remotely without using pcANYWHERE32” on page 320](#).

Restarting the server remotely without using pcANYWHERE32

Introduction

This section describes how to restart the server without using pcANYWHERE32 if it is not installed or not available. If pcANYWHERE32 is installed, then establish a remote control session and restart the server using the Start > Shutdown option. See [“Restarting the server remotely” on page 319](#).

What restarting the server remotely involves

To restart the server remotely, you must

- configure the Hyperterminal connection
- configure the ports
- edit the Host file to establish a connection with the server

HyperTerminal

HyperTerminal (with a modem) enables you to connect to a remote computer, even if it is not running Windows. You must configure a HyperTerminal connection.

After a HyperTerminal connection is configured, it appears as a submenu in Accessories in the Programs menu.

To configure HyperTerminal

- 1 Click Start > Programs > Accessories > HyperTerminal.
- 2 Double-click Hyperterminal.
Result: The Connection Description window appears.
- 3 Enter a name that describes the connection, then select an icon (optional).

- 4 Click OK.
Result: The Connect to window appears.
- 5 Select the port to which the modem is attached.
Result: The Properties window appears.
- 6 Select 19200 Bits per second.
- 7 Click OK.

To configure the modem port

- 1 Click Start > Settings > Control Panel.
- 2 Double-click Modems.
- 3 Click the Device Manager tab.
- 4 Select View the devices by type.
- 5 Double-click Ports (COM & LPT).
- 6 Click the Communications Port used by the modem (either COM1 or COM2).
- 7 Click the Port Settings tab.
- 8 Select 19200 in the Bits per second tab.

To restart the server remotely

- 1 Open Notepad or a similar application.
- 2 Add the server IP address to the end of the following file:
WinNT/System32/Drivers/etc/host.
Example: 127.0.0.1 <name>
- 3 Establish a connection to the server using Dial-Up Networking (DUN).
For information on how to connect using DUN, see [“Establishing a connection using Dial-Up Networking” on page 313](#).
- 4 Type the following in the host file:

shutdown -n <number> and -r

Example: shutdown -h myhostname -n 4165971111

5 Disconnect the DUN connection:

- a.** Right-click the icon on the toolbar.
- b.** Click Disconnect.

Result: The connection to the server is broken, and the system calls back to the administrative PC at the number entered in step 4. When the connection is reestablished, the server restarts and restart information appears in the HyperTerminal window.

Note: This process takes approximately five minutes.

6 Type the following in the HyperTerminal window:

ATS0=1

7 Press Enter.**8** After restart is complete, close the HyperTerminal window.

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CallPilot

Administrator's Guide

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