



# NORTEL

## CallPilot™

Release 4.0 - Standard 1.02

### Desktop Messaging User Guide

for My CallPilot



# CallPilot Desktop Messaging User Guide for My CallPilot

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# How to get Help

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

## Getting Help from the Nortel Web site

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

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

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

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

## Getting Help over the phone from a Nortel Solutions Center

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

In North America, call 1-800-4NORTEL (1-800-466-7865).

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

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

## Getting Help from a specialist by using an Express Routing Code

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

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

## Getting Help through a Nortel distributor or reseller

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





My CallPilot\* from Nortel is a web-based business communications system that offers exceptional flexibility for managing your messaging needs.

You can work with My CallPilot from any computer that has Internet access and a web browser configured for My CallPilot. Here are some of the many ways you can use My CallPilot:

- Enable record, edit, and delete greetings.
- Configure the Message Forwarding Rule.
- Configure e-mail-by-phone.
- Configure mailbox link.
- View useful information about your mailbox.
- Receive, forward, reply to, and send voice messages, faxes, and e-mails.
- Change the setup of your mailbox features.
- Change your CallPilot password.
- Create personal distribution lists.
- Set up remote notification to a telephone or pager.
- Set up text message notification for a wireless e-mail device. See Appendix A for details.

Some features mentioned in this guide are options. For details, refer to the *Feature availability* topic in the CallPilot Player online Help, or ask your administrator.

NOTE: The screen images of dialog boxes shown in this guide are those displayed when operating My CallPilot in the Windows environment, unless otherwise specified. Users of the Macintosh or Linux environments may see altered versions of these dialog boxes, depending on specific feature and functionality support.

# Getting started

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## About this guide

This user guide describes how to use the web-based resources of My CallPilot. The instructions and screen images shown in this guide provide general information for using My CallPilot through a web client. Specific details can vary, depending on your computer operating system and the features available for your CallPilot mailbox.

For further assistance, refer to the My CallPilot online Help.

## What you need

You can access My CallPilot from any computer with Internet access and a web browser configured for My CallPilot. Before you start to use My CallPilot, ensure that the computer you are using is set up according to the following requirements:

### Windows-based hardware and software

- Windows 2000 Professional, or Windows XP Professional
- Windows Server 2003 Standard with IIS 6.0
- Internet Explorer 6.0; Netscape 6.2, 7.0, 7.1, 7.2; or Mozilla 1.7.x and Mozilla FireFox 1.0 on RedHat Linux 9 Operating System
- Sound card and speakers for playing voice messages on your computer
- A microphone connected to your computer, or a telephone situated near your computer, for recording voice messages

### Macintosh-based hardware and software

- PowerPC G3 processor or newer (PowerPC G4 preferred)
- Mac OS X, 9.0 or 9.1 (preferred)
- RedHat Linux 9 Operating System

**Note:** The Mac My CallPilot Web Client software is not designed for compatibility with Mac OS X. Although this version of the CallPilot application can run in OS 9.0 and 9.1 Compatibility mode, the CallPilot application may crash or behave erratically.

- Internet Explorer 5.1
- QuickTime version 4.0
- AppleScript version 1.3
- TCP/IP network connection of at least 56 Kbit/s
- MacOS-supported sound output device (speakers)
- MacOS-supported sound input device (microphones)

**Note:** The type of microphone to use depends on the type of Macintosh the user has, and a microphone designed for a Windows-based PC often does not work. Some older PowerPC Macs require a PlainTalk microphone, or similar. The system administrator should verify that the user has a working microphone and speaker setup before installing My CallPilot.

### Linux-based software

- Red Hat Linux 9

- Mozilla 1.7x browser
- Audacity 1.2.x, Gnome Sound recorder 2.x, and Krecord 1.1 audio applications

### Peripheral hardware and software

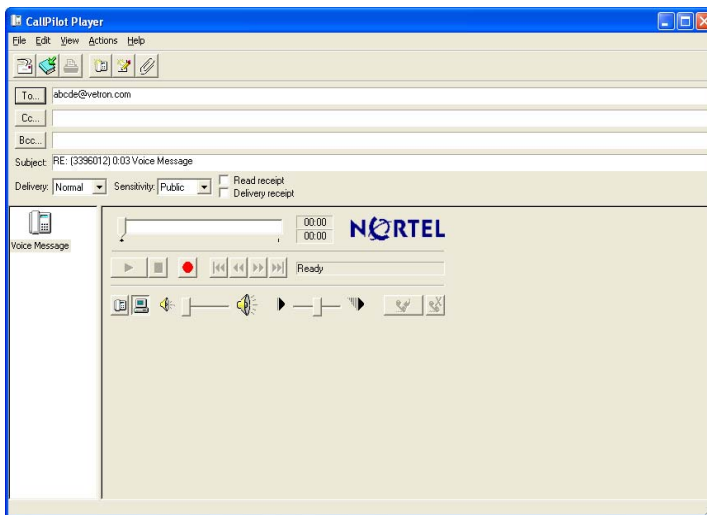
- Video display and monitor with 8-bit (256-color) 800 x 600 capability (1024 x 768 16-bit color preferred)
- Nortel Fax Driver and CallPilot Desktop Messaging to create faxes
- CallPilot Player to play and record voice messages. An embedded version of the CallPilot Player (shown in this guide) may appear in your inbox and voice messages. (For required settings, see *Setting messaging preferences*, on page 57.) Some Windows-based systems and all Macintosh systems do not display the embedded player. If not, you are be prompted to download the CallPilot Player. If you are on a Windows-based platform and are only playing messages, not recording, you can use the Microsoft Windows Media Player, or another WAV-compatible media player. These players do not function in exactly the same way as the CallPilot Player described in this guide.
- LAN (Ethernet), ISDN, ADSL, or dial-up modem connection to the CallPilot server for accessing CallPilot messages

### To download audio players

You need an audio player to play and record voice messages. The first time you log in to My CallPilot, My CallPilot checks to see that an audio player is installed. If one is not installed, you are prompted to download the CallPilot Player. Follow the instructions to start the download and installation process. If you need to re-install a player at a later time:

- 1 Click **Downloads** on the CallPilot Features main page.

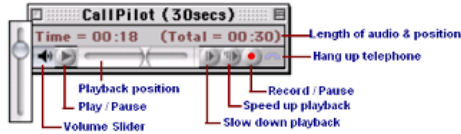
Select the CallPilot Player or other audio player from the list. The various downloadable players are shown below.



## The Windows downloadable CallPilot Player

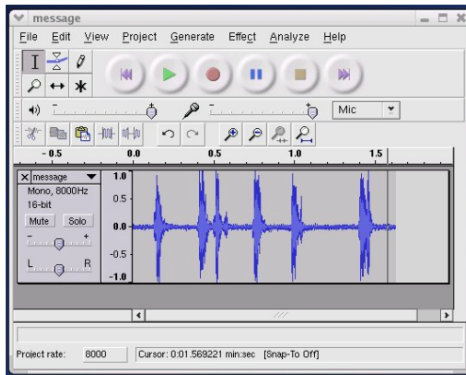


## The Macintosh downloadable CallPilot Player with QuickTime 4.0



## The Macintosh downloadable CallPilot Player with QuickTime 5.0

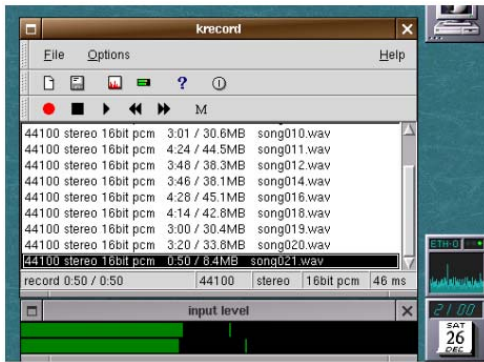
For the Linux environment, the following record and playback applications are supported:



## Audacity 1.2.x



## Gnome Sound Recorder 2.x



### Krecord 1.1

Other audio applications may work but are not supported.

# Logging in

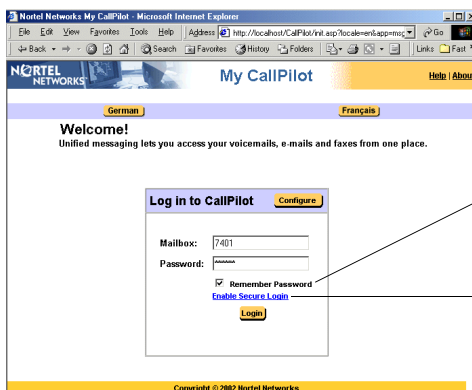
Your administrator provides you with the URL for My CallPilot. Bookmark this address in your web browser for easy access.

## To log in to My CallPilot

- 1 In your web browser, navigate to the My CallPilot address.
- 2 On the Welcome page, in Mailbox, type your mailbox number. This is usually your office telephone extension number.
- 3 In **Password**, type your CallPilot password.
- 4 Click **Login**.

### Note:

Users of Windows Server 2003 with IIS 6.0 can use Windows 2003 as a client to log in and use My CallPilot.



Do not check the Remember Password box on a shared computer.

The Login Securely link appears if SSL encryption is enabled.

## To change to another server

If you have a mailbox on another CallPilot server, you can log in to that server from My CallPilot. Click **Configure**, type the server details, then click **OK**. When you log in again from the same computer, CallPilot accesses the new server. To change back to your default server, click **Configure**, then click **Restore Default**.

## To change to another language

If language buttons are available on your My CallPilot log in page, you can click one to change from your default language to another language.

## To log in using secure login

If the Enable Secure Login link is available on your login page, click the **Enable Secure Login** to enable SSL encryption. The Login Securely button appears. Bookmark the link for future log in.

## To log in remotely

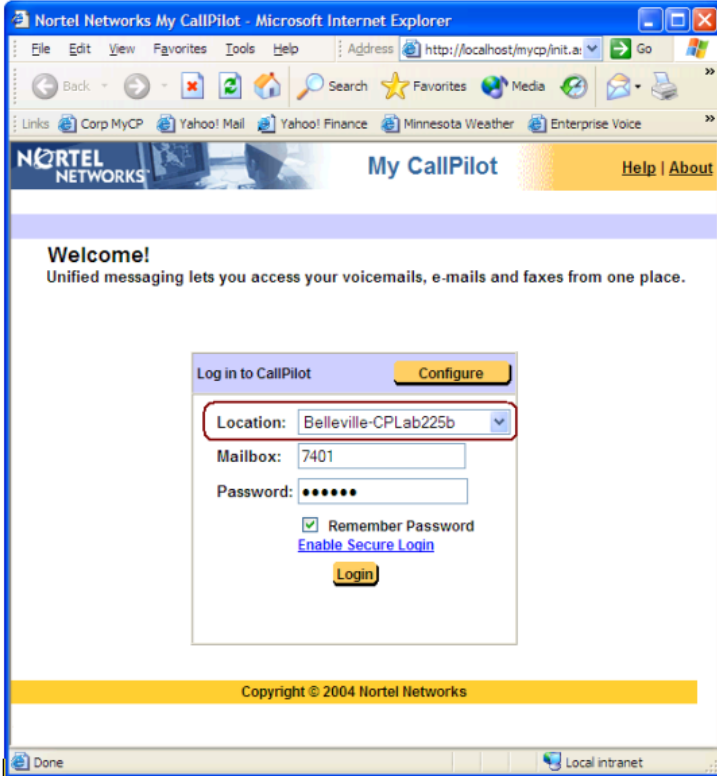
You can log in to My CallPilot from any computer that has Internet access and supported browser configuration. You can use the pre-installed audio player for voice messages, or you can download the CallPilot Player for full feature capability.

## To log out

To log out from My CallPilot, click Logout on any My CallPilot page.

## Logging in to environments with multiple CallPilot servers

My CallPilot has enhanced support for environments that have multiple CallPilot servers. If this applies to your situation, a drop-down menu containing multiple CallPilot servers appears in the Log in page.



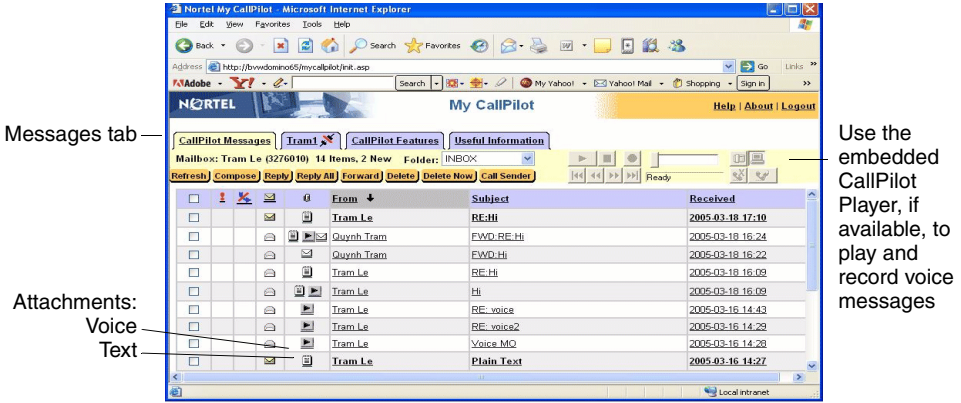
Selecting a server from this list allows you to select (and log in to) your CallPilot server without needing to know any of your server-specific settings (beyond your mailbox and password).

This feature is implemented as simple text-based file (cpserverlist) that an administrator can create using the My CallPilot Administration Utility.

# CallPilot Messages tab

To access your CallPilot messages, click the CallPilot Messages tab. You can access voice messages and view faxes, delete, forward, and reply to messages, and compose new messages.

## Your Message List



## To check for new messages

To see new messages, click **Refresh**. New messages appear in Bold.

You can sort your mailbox message list through the Read/Unread, Priority, and Subject columns, as well as the From and Received columns.

<input type="checkbox"/>		<b>From</b>	<b>Subject</b>	<b>Received</b>
<input type="checkbox"/>		JOSEPH MARCHESE	(63331007) 0:47 Voice Message	2004-03-04 14:41
<input type="checkbox"/>		Unknown	(Unknown) Fax ID: 1100. 1 p Fax Message	2004-03-25 10:50

The messages are sorted by simply clicking on the column headings.

**Note:** Only the messages currently displayed are sorted, which may not be the entire message list.

## To open a message

To open a CallPilot message, click the voice, fax, or text icon in the Attachments column beside the message, or click any underlined part of the message line. See *Playing voice messages*, on page 18, and *Viewing fax messages*, on page 20.

## To select a message

To select a CallPilot message, check the box at the far left of the message line. When a message is selected, you can delete, forward, or reply to it.



## To delete a message

To delete a CallPilot message, select the message and click **Delete** or **Delete Now**. If you click **Delete**, the message is permanently deleted when you log out. If you click **Delete Now**, all selected messages are permanently deleted immediately.

## To select your telephone or computer to play and record voice messages

You can choose to play and record voice messages through your telephone or your computer. Click the Telephone or Computer icon in the embedded or downloaded CallPilot Player. (To record and play messages using the telephone, you must have a properly configured firewall, or no firewall between you and the web server.)

See *Setting messaging preferences*, on page 57, to change the audio setting and the number that CallPilot dials for playing and recording messages.

# Playing voice messages

Before playing voice messages, see *To select your telephone or computer to play and record voice messages*, on page 17.

## To play a voice message the quick way (Windows only)

Use the embedded CallPilot Player, if available, to play your voice messages quickly. (The player appears in your Message List if the Attachments column appears, and if you select VBK as your audio setting. See *Setting messaging preferences*, on page 57. Note that the player can also play WAV format audio files.)

- 1 In your Message List, click the Voice (**Play**) icon in the Attachments column. When the audio controller window appears (Windows version shown below), press the **Play** button if playing does not start automatically.

### Embedded Windows CallPilot Player

Controls on other audio players vary



- 2 If you selected **Computer** for playback, the audio player plays your message from your computer's speakers. If you selected **Telephone** for playback, your telephone rings and plays the message when you answer.
- 3 Use the player buttons to stop, re-play, or call the sender. The slider control on the player permits positioning within a recording. Note that the volume level and the play rate (speed) cannot be adjusted when using the embedded player.
- 4 Click **Disconnect** or hang up the telephone when you are finished.

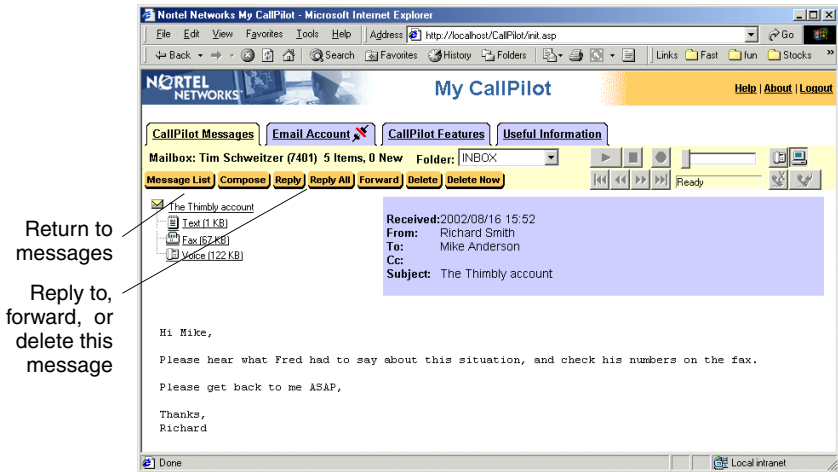
## To play a voice message in a mixed voice, fax, or text message

In a mixed voice, fax, or text message, open the message to select each part.

- 1 In your Message List, click any underlined part of the message to open it.
- 2 In the open message, click the **Voice** icon. The audio player opens.
- 3 If you selected **Computer** for playback, the audio player plays your message from your computer's speakers. If you selected **Telephone** for playback, your telephone rings and plays the message when you answer.
- 4 Use the player buttons to stop/pause, re-play, or call the sender (Windows only). Other controls on the player also permit absolute positioning within a recording, volume level adjustment, altering the play rate (speed), and disconnecting (hanging up).

**Note:** On the Macintosh CallPilot Player, there is no Stop button. When you click the Play button, play begins and the Play button then becomes the Pause button. In addition, the audio control commands can be accessed through the Audio menu of the Macintosh CallPilot Player.

- 5 Click the **Disconnect** (Windows) or **Hang Up** (Mac) button, or hang up the telephone when you are finished. Click Message List to return to your messages.



#### Note for Linux users:

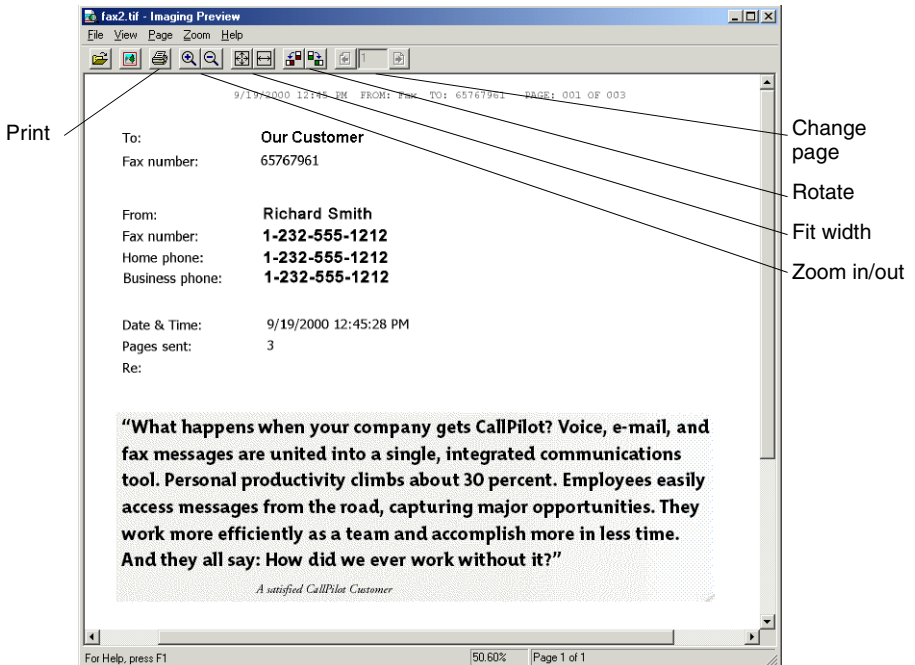
Linux users can view and play (through any WAV player) their CallPilot messages in the Mozilla browser. However, there is no VBK playback or recording. Users can see their text and listen to audio messages using the WAV audio format.

# Viewing fax messages

To view faxes on your computer, you must have ImageMaker or other imaging software installed on your Windows-based computer. For Macintosh users, the CallPilot Player application is used to view faxes. In addition, your CallPilot administrator must enable fax capability for your mailbox in order for you to receive faxes.

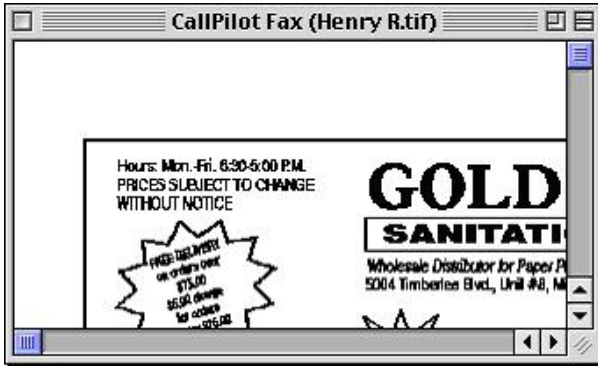
## To view a fax message

- 1 In your Message List, click the **Fax** icon beside the message, or click any underlined part of the message that you want to view.
- 2 The image may display right away, or if the **Open/Save** dialog box appears, select **Open** to display the image. The fax can then be scaled to its normal (printed page) size, to an enlarged view that still fits on typical displays, to a maximum size where every pixel is visible, or to a view where a fax page is made to fit the current window size. The fax document may also be rotated to 90, 180, or 270 (-90) degrees.
- 3 When you have finished, close the fax image to return to your messages.



**Note:** If you use Windows imaging software other than ImageMaker or if you work on a Macintosh, the appearance of the fax message may differ from the one shown. In addition, some of the controls seen here, such as Zoom in and Zoom out, may not be available.

In the Macintosh CallPilot Player, the control commands are accessed through the Fax menu.



**Note:** Nortel Player is not provided for Macintosh OS X.

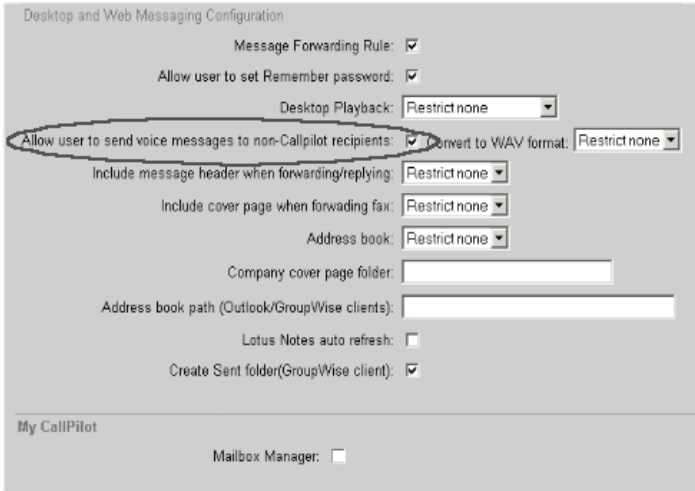
# Composing voice messages

You can compose a message that is any combination of voice, fax, or text. To record voice messages, use the embedded or the downloaded CallPilot Player.

## Allow User to send voice messages to non-CallPilot recipients

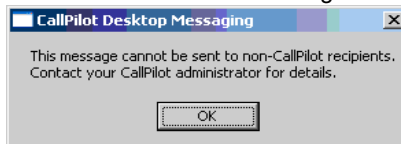
(for CallPilot server release 3.0 and above)

The system administrator has control over the distribution of CallPilot voice messages outside of the organization. **Allow user to send voice message to non-CallPilot recipients** - if the system administrator leaves this option unchecked, the user is unable to save or forward audio attachments or voice messages to non-CallPilot recipients.



**Note:** If the user attempts to forward a voice message to a non-CallPilot recipient using Microsoft Outlook, standard e-mail form, the operation appears to have functioned properly. The recipient of the message only receives the VBK header. The audio data is not sent, and the message cannot be played.

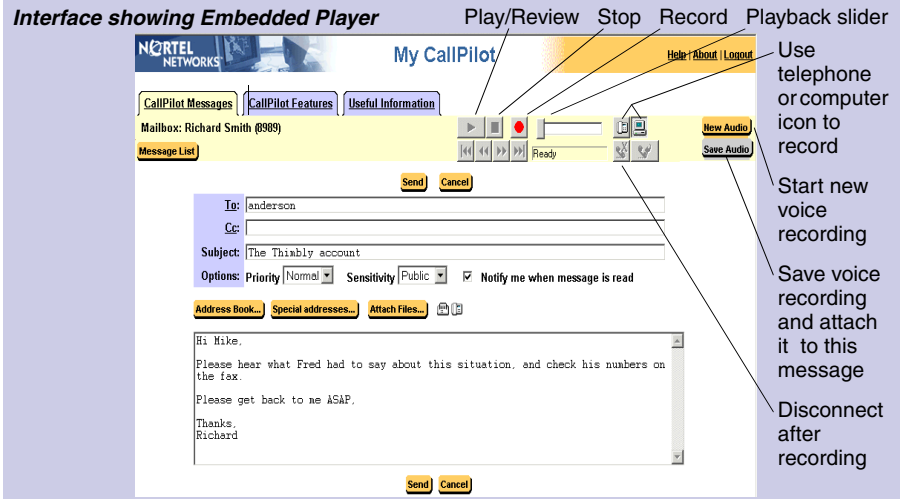
If **Allow user to send voice messages to non-CallPilot recipients** is unselected (not checked) you are not able to forward voice messages to non-CallPilot addresses. However, you are still able to forward voice message to CallPilot addresses.



**Note:** If **Allow user to send voice messages to non-CallPilot recipients** is unselected (not checked) the user is not blocked from forwarding voice messages to an external e-mail account if they are using Internet IMAP clients (Outlook Express, Eudora, or Netscape Messenger).

## To record and send a new voice message

- 1 In your Message List, click **Compose**. A new message page opens.
- 2 Click **To...** (or Address Book) to choose an address from the CallPilot Address Book, or click **Special Addresses**. See *Addressing messages*, on page 33.
- 3 Add a subject description in the **Subject** text box.
- 4 In the embedded or downloaded Windows CallPilot Player, select the **Telephone** or **Computer** icon. If you are using a Macintosh, select either **Use Telephone** or **Use Macintosh** from the CallPilot Player's Audio menu.

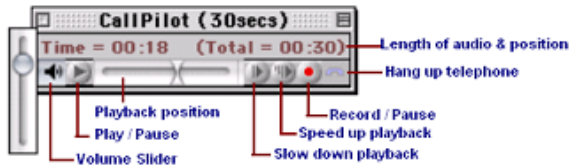


- 5 Click the **Record** button.

**Note:** You can only record into a new audio window, not to audio files that exist in your inbox.

**Note:** The embedded player does not permit adjustment of the recording volume.

**Note:** In the Macintosh CallPilot Player window (QuickTime version 5.0, shown below), there is no Stop button.



When you click the **Record** button, recording begins and the **Record** button then becomes the **Pause** button.

- 6 ▶ If you are recording from the computer, record your message into the microphone. Click **Pause** to pause the recording. Click **Stop** to end the recording. Click **Play** to review it. To add to the recording, click **Record**, speak again, then click **Stop**. Click **Save Audio**.
  - ▶ If you are recording from the telephone, answer when the telephone rings. At the tone, record your message into the handset. Click **Pause** to pause the recording. Click **Stop** to end the recording. Click **Play** to review it. Click **Save Audio**. Hang up.

**Note:** Saving your audio works a little differently depending on which version of the CallPilot player you are using. If you use the embedded version, the **Save Audio** button only saves the message as an attachment to the current message. If you use the downloaded (stand-alone) version, you save the recording as a file, which you then attach to your message.

- 7 If you are using the stand-alone version of the Player, add your voice message file as an attachment and set options if required. See *Adding attachments to messages*, on page 31, and *Setting message options*, on page 32.
- 8 Click **Send**.

### To save a newly created voice message as a file

To save a copy of your voice recording as a standalone file you must use the standalone CallPilot Player, not the embedded Player.

- 1 Open the CallPilot Player, record a new message, and on the File menu, click **Save** or **Save As**.
- 2 In the File name box, type a name for the file, select a folder to keep the file in, then click **Save**. Save voice files as VBK files.

**Note:** My CallPilot automatically converts VBK files to WAV files when sending to non-CallPilot users.



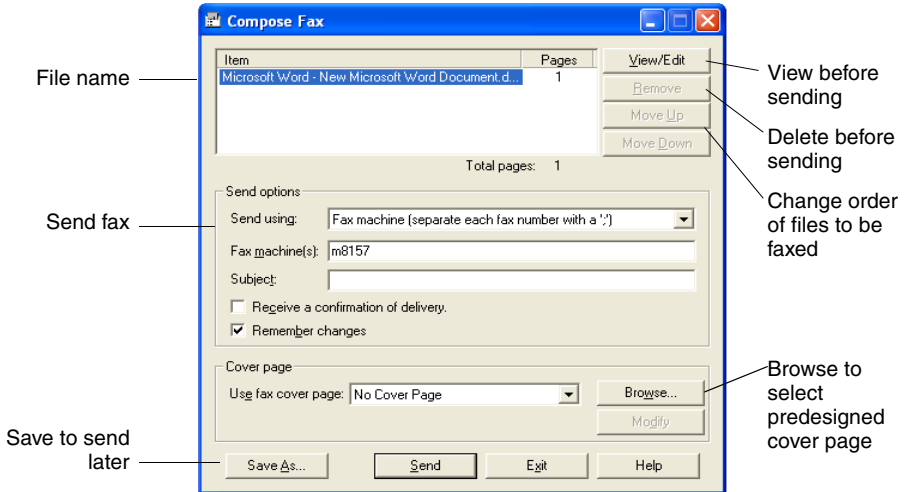
# Composing fax and text messages

Your CallPilot recipients must have fax capability to view your fax on their computer. If your recipients access their messages from their telephone, they can view the fax only by printing it. You can also send your fax to a fax machine.

## To create and save a fax file

To create a fax file, your CallPilot mailbox must have fax capability, and your computer must have Desktop Messaging installed. After you save the fax file, you can add the fax to a message as an attachment.

- 1 Launch the application you want to use to create a fax with. The document you open or create must be 8.5 in. (21.5 cm) wide or less. Multiple page documents are allowed.
- 2 When the document is ready:
  - ▶ **Windows computer:**
    - a. Click **Print** or **Print Setup** under the **File** menu.
    - b. From the list of printers, select **Nortel Fax**.
  - ▶ **Mac computer:**
    - a. First select the **Chooser desk accessory** from the Apple Menu.
    - b. Then select the **CallPilot Fax icon** and close the window.
- 3 Click **OK**.
- 4 In the **Compose Fax** dialog box, click **Save As**.



Compose Fax dialog box - Windows version



### Compose Fax dialog box - Macintosh version

- 5 Type a name for the file, and browse to select a folder to save the file in. Save the file as a TIF file. Click **Save**.  
**Note:** If you chose to include a Subject line, the information in that text box is displayed in the e-mail portion of the fax. The Subject line is not displayed on a hard copy of the fax.
- 6 Click **Exit** to close Compose Fax.

### To compose and send a fax or text message

- 1 In your Message List, click **Compose**. A new message page opens.
- 2 Click **To...** (or Address Book) to choose an address from the CallPilot Address Book, or click **Special Addresses**. See *Addressing messages*, on page 33.
- 3 Add a fax file as an attachment. See *Adding attachments to messages*, on page 31.
- 4 Add options if required. See *Setting message options*, on page 32.
- 5 Enter text if required.
- 6 Click **Send**.

#### **Note for Linux users:**

Fax viewing or sending is not supported at this time.

## Calling the sender of a message

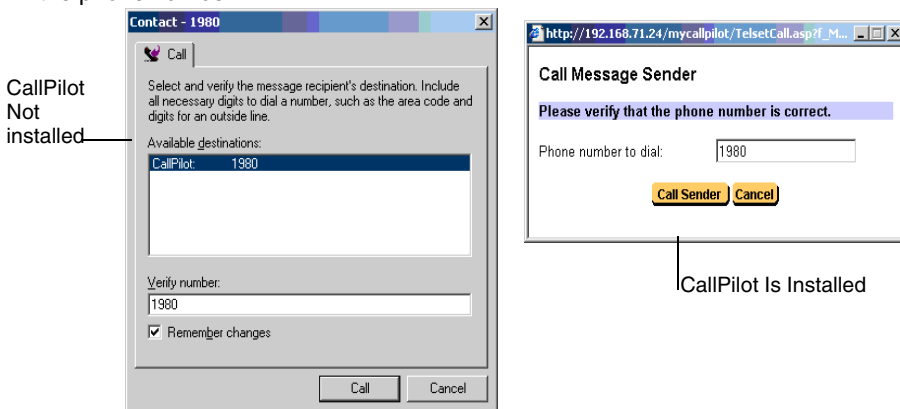
You can respond to a message with a telephone call instead of a recorded message.

My CallPilot includes a Call Sender button that appears in both the Message List and Open Message views. Clicking the Call Sender button calls the sender of the currently selected message, regardless of whether or not the message contains an audio attachment.

The Call Sender button only appears when all of the following conditions are met:

- The Mailbox Class allows the Telset Class-of-Service
- Messages are being viewed on the CallPilot server

When the Call Sender button is pressed, depending on whether CallPilot is installed on the client computer or not, an appropriate dialog box appears asking you to verify the phone number.



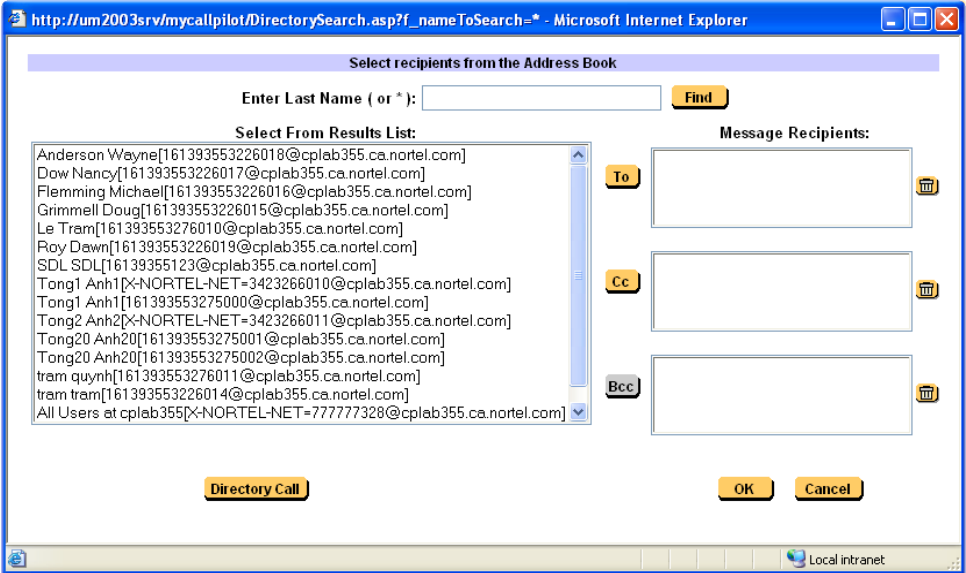
The Remember changes check box associates the new phone number with the original. Subsequent calls to the same sender auto-fill the Verify number field with the new phone number. The maximum number of digits that can be entered is 50.

The Call Sender button causes your telset to ring. When you answer the call, your telset is connected to the specified phone number.

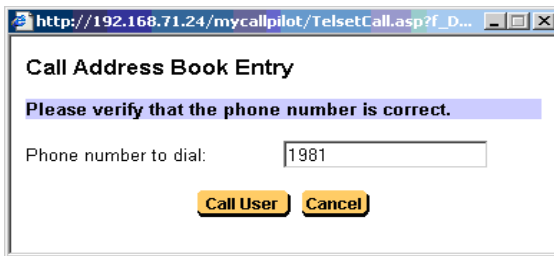
This Make Call feature contains no error detection after the call has been placed, and My CallPilot does not have control over the call or your telset after the call has been placed.

My CallPilot also includes a new Directory Call button in the Address Book Search view. This button only appears when you compose a message on your CallPilot

server.



Selecting an Address Book entry and clicking Directory Call extracts the entry's phone number. This phone number is then displayed in the Call Address Book entry dialog box.



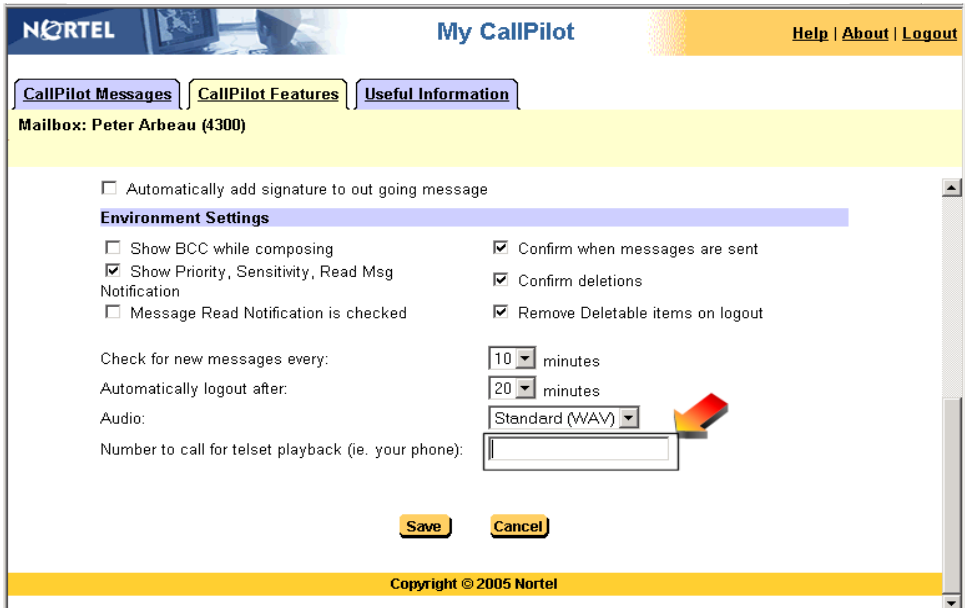
**Note:** The above dialog box appears if CallPilot Player is not installed on the client computer.



Clicking on Call User causes your telset to ring. When you answer the call, My CallPilot calls the specified phone number.

Note that the Restriction Permission List defined in CallPilot Manager is not checked before attempting to dial the digits. If the phone number is rejected by CallPilot or the switch, no error dialog box appears.

**Note:** If the field **Number to call for Telset Playback (ie. your phone)** is blank, go to the **My CallPilot Features** tab and select **My CallPilot Preferences** and enter the number at the top of the page, in this example 4300, in the **Number to call for Telset Playback (ie. your phone)** field and click the **Save** button. .



# Forwarding and replying to messages

You can forward a message, and compose an introduction to send with it. You can also compose a reply to the sender of a message, or to the sender and all recipients of a message.

## To forward or reply to a message

- 1 In an open message, click **Forward**, **Reply**, or **Reply All**.



- 2 On the new message page, compose a voice, fax, or text message.
- 3 Address forwarded messages the same way as a new message. Replies are addressed automatically.
- 4 Add attachments, set options, and change the Subject line if required.
- 5 Click **Send**.

The screenshot shows the 'My CallPilot' web interface. At the top, there's a navigation bar with 'CallPilot Messages', 'CallPilot Features', and 'Useful Information'. Below that, it says 'Mailbox: Richard Smith (8989)'. The main area is a message composition form. It has fields for 'To:' (filled with 'anderson'), 'Cc:', and 'Subject:' (filled with 'The Thimble account'). There are also options for 'Priority' (Normal), 'Sensitivity' (Public), and a checked box for 'Notify me when message is read'. Below the form are buttons for 'Address Book...', 'Special addresses...', and 'Attach Files...'. The message body contains the text: 'Hi Mike, Please hear what Fred had to say about this situation, and check his numbers on the fax. Please get back to me ASAP. Thanks, Richard'. At the bottom of the form are 'Send' and 'Cancel' buttons. Two arrows point from the text 'Type text message' and 'Attach file' to the message body and the 'Attach Files...' button respectively.

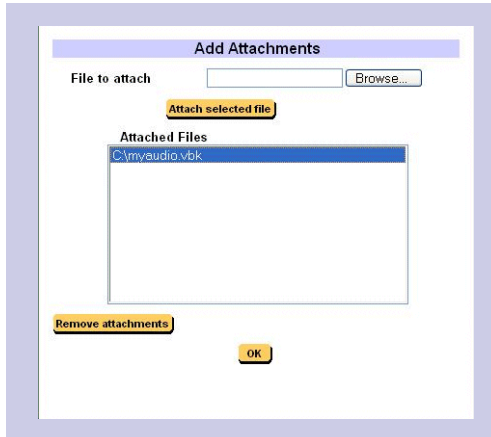
# Adding attachments to messages

---

Before sending a message, you can attach one or more voice, fax, or text files to it. Voice files can be either VBK or WAV format for both Windows and Macintosh CallPilot recipients. My CallPilot automatically converts VBK files to WAV files when sending to non-CallPilot users. Fax files must be TIF format. Text files must be TXT format.

## To attach a file to a message

- 1 On a new message page, click **Attach Files...** .
- 2 In Add Attachments, click the **browse** button to browse for and select the files that you want to attach.



- 3 Click **Open**.
- 4 Click **Attach Selected File** button.
- 5 Click **OK**. The icon for the attached file appears beside the **Attach Files** button on the new message.
- 6 Continue to compose, address, and send the message as usual.

# Setting message options

---

Before sending a message, you can set options for handling and delivery.

## To set message options

- 1 On a new message page, select **Priority**, **Sensitivity**, and **Receipt** options, as required.

Options: Priority  Sensitivity   Notify me when message is read

- ▶ For **Priority**, select **Low**, **High**, or leave the setting as **Normal**.
- ▶ For **Sensitivity**, select **Private**, or leave the setting as **Public**.

You cannot forward messages that are marked **Private** to other CallPilot users. However, be aware that when you send a message marked **Private**, your recipient can still forward the message to someone else, if the recipient is not a CallPilot user. Also, recipients in non-CallPilot systems are not informed of Private settings. In your message, tell the recipient that the message is private.

- ▶ For **Notify me when message is read** checked, check the box to request acknowledgment that your recipient received the message.
- 2 Continue to compose, address, and send the message as usual.



# Addressing messages

You can address a CallPilot message in two ways:

- You can select a name from the CallPilot Address Book that is maintained by your organization on the server. The Address Book contains the addresses of the CallPilot users and shared distribution lists that you can use. You cannot edit this list.
- You can manually enter or select addresses on other servers in Special Addresses.

The screenshot displays two side-by-side panels for addressing a message. The left panel, titled "Select recipients from the Address Book", features a search bar for "Enter Last Name ( or \* ):", a "Find" button, and a "Select From Results List:" area. Below this are three "Message Recipients:" fields with "To", "Cc", and "Bcc" labels, each accompanied by a trash icon. A "Directory Call" button is at the bottom left, and "OK" and "Cancel" buttons are at the bottom right. The right panel, titled "Enter a Special Address", has a dropdown menu for "Address format:" set to "Personal Distribution List". Below is an "Address Information:" section with fields for "Local Server:" (47.100.19.12), "SMTP/VPIM prefix:" (1612937), "Local mailbox:", and "Personal List Number:". A text block explains that Personal Distribution Lists (PDLs) are used to send messages to a group of users. At the bottom, an "Add to:" section includes "To", "Cc", and "Bcc" buttons.

## To address a message from the Address Book

- 1 In a new CallPilot message, click **To** (or **Address Book**).
- 2 In **Enter last name**, type the recipient's name, then click **Find**.
- 3 In the list of names, select the name of the recipient or distribution list.
- 4 Click **To**. You can select one or more addresses, clicking **To** after each one.
- 5 Click **OK** to return to the new CallPilot message.

## To address a message in Special Addresses

- 1 On a new message page, click **Special Addresses**.
- 2 Select an address format from the drop-down list (for example: Network mailbox or Personal Distribution List). Note that Personal Distribution List entries appear alphabetically sorted when doing an Address Book search.
- 3 Type the number and any other information required. Refer to the online Help for the correct addressing formats.

#### 4 Click To.

### Searching External E-mail Address Books (LDAP databases)

The LDAP text boxes you can specify for your e-mail account (refer to *Setting up links to your e-mail accounts*, on page 53) allow My CallPilot to search external LDAP databases, which in turn allows you to search for an e-mail address in your corporate Address Book.

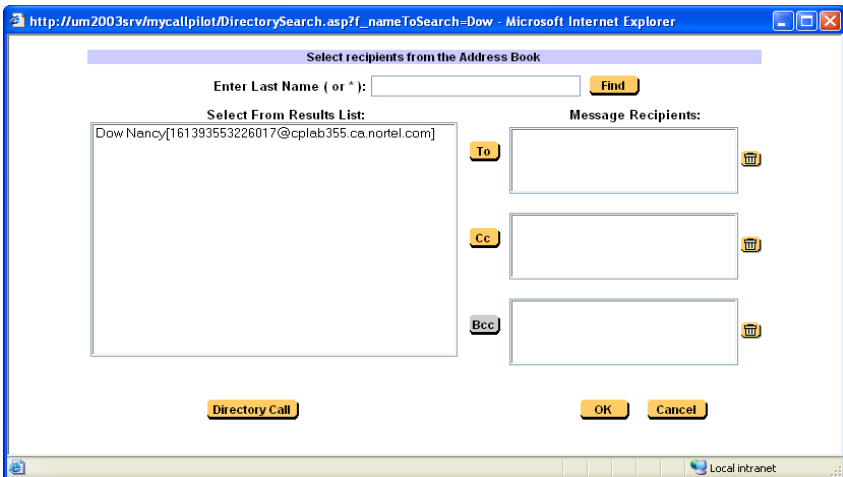
**Note:** This ability requires the administrator to enter the correct searchbase, host/IP and login info (if needed) for the external LDAP server. This information must be entered in CallPilot Manager when the External E-mail server is defined.

You can enter user log in credentials, if needed, inside My CallPilot.

Once these text boxes are properly configured, you can search the external Address Book when composing a new external e-mail server message (just as you do when composing a CallPilot message).

To access the Address Book, you simply click on the Address Book button, or To links in the My CallPilot Compose page.

The following shows an example of an external e-mail server Address Book in My CallPilot:



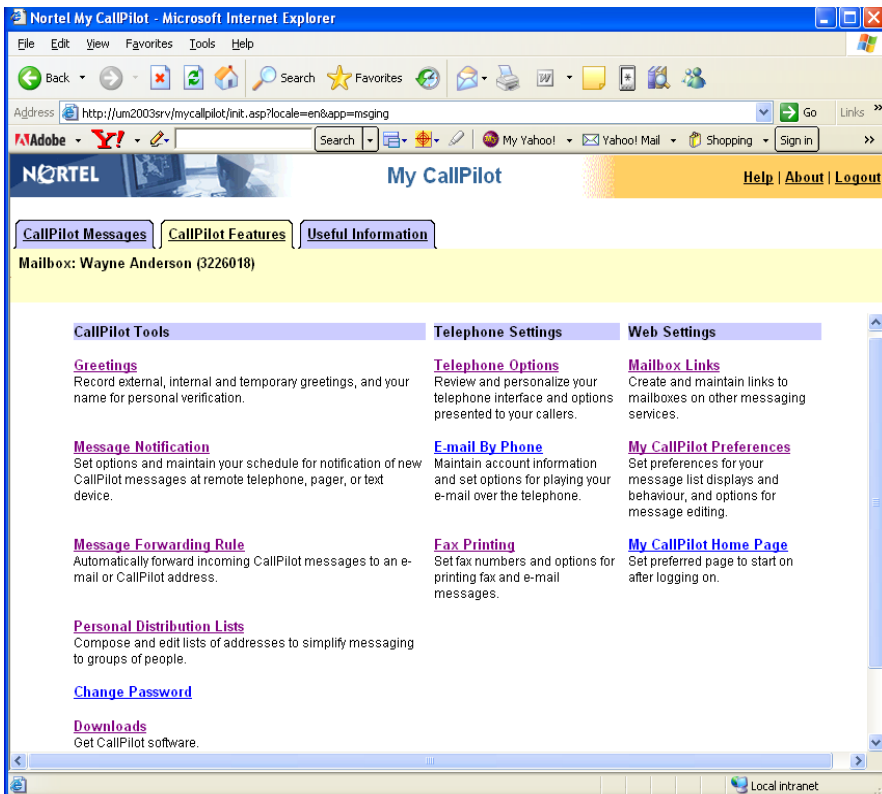
Note that the Address Book is tied to the current server you are using (that is, the inbox you are displaying). Therefore, when you compose a new CallPilot message, the Address Book displays addresses only from the CallPilot server. When you compose a new Exchange message, the Address Book displays addresses only from the Exchange server, and so on.

Non-personal distribution lists can appear in the results if, and only if, the server is configured to return them through a standard anonymous LDAP query.

# CallPilot Features tab

Click the CallPilot Features tab to change the settings for your CallPilot features and telephone options, and to set preferences for web-based access.

The main CallPilot Features page displays only the features that are available for you to use. Click any title to open its settings page.



# Greetings

The Voice Greetings feature allows you to record and manage your voice greetings and personal verification from My CallPilot.

Selecting the Greetings link loads the Greetings page. From this page, you can record, play, delete, and import voice greetings and personal verification. The Greeting page also shows the greeting status (recorded/not recorded) and allows you to assign expiry dates to a temporary greeting.

The CallPilot Player is required to record/play greetings or personal verification from My CallPilot. An alert appears if CallPilot Player is not installed and you try to play/record greeting/personal verification.

You can import VBK and WAV-PCM files for greetings and personal verification messages. The files can be imported with or without the CallPilot Player. If the CallPilot Player is not installed, you can record/save a WAV-PCM file from another media application and import the WAV-PCM file using My CallPilot.

## For Internet Explorer users:

If the CallPilot Audio Player is present, the audio player is embedded directly in the web page.

**My CallPilot** Help | About | Logout

CallPilot Messages CallPilot Features Useful Information

Mailbox: Quynh Tram (3276011)

Ready Save Greeting

OK

### Greetings

You can record external, internal and temporary greetings. Callers from outside your organization hear your external greeting, callers within your organization hear your internal greeting. If you do not record an internal greeting, all callers hear your external greeting.

Greetings	Edit	Import	Delete	Recorded
External Greeting				
Internal Greeting				
Temporary Greeting				

Expiry date

No Expiry Date

December 31 at 19:00

If you record a temporary greeting, it is played to all callers in place of your external and internal greetings until it expires or you delete it.

Personal Verification

- 1 Click the **Edit** button to activate a specific greeting. When activated, the greeting text is shown in a bold italic font.
- 2 You can then use the embedded audio player to play the greeting, record a new greeting, or add to the greeting. You can record a greeting using your telset.
- 3 Press the **Save Greeting** button to make the changes permanent. If you do not press the Save Greeting button, an alert appears.

**NORTEL** My CallPilot [Help](#) | [About](#) | [Logout](#)

[CallPilot Messages](#) [CallPilot Features](#) [Useful Information](#)

Mailbox: Quynh Tram (3276011)

Recording... **Save Greeting** **OK**

**Greetings**  
 You can record external, internal and temporary greetings. Callers from outside your organization hear your external greeting, callers within your organization hear your internal greeting. If you do not record an internal greeting, all callers hear your external greeting.

Greetings	Edit	Import	Delete	Recorded
External Greeting				✓
<i>Internal Greeting</i>				
Temporary Greeting				

Expiry date  
 No Expiry Date  
 December 31 at 19:00

If you record a temporary greeting, it is played to all callers in place of your external and internal greetings until it expires or you delete it.

---

Personal Verification ✓

### For Netscape Navigator users:

If you are using Netscape Navigator, the stand-alone audio player is used to record and play voice greetings and personal verification. The CallPilot Player can be launched by pressing the Edit button, or from the Windows Start menu.

**NORTEL** **My CallPilot** [Help](#) | [About](#) | [Logout](#)

[CallPilot Messages](#) | [CallPilot Features](#) | [Useful Information](#)

Mailbox: Quynh Tram (3276011)

Ready **Save Greeting**

**OK**

### Greetings

You can record external, internal and temporary greetings. Callers from outside your organization hear your external greeting, callers within your organization hear your internal greeting. If you do not record an internal greeting, all callers hear your external greeting.

Greetings	Edit	Import	Delete	Recorded
External Greeting				
Internal Greeting				
Temporary Greeting				

Expiry date  
 No Expiry Date  
 December 31 at 00 : 0

If you record a temporary greeting, it is played to all callers in place of your external and internal greetings until it expires or you delete it.

---

Personal Verification				
-----------------------	--	--	--	--

## Recording a greeting

Record a greeting using CallPilot stand-alone player or any other media applications that support WAV-PCM format as follows:

- 1 Record a voice greeting or personal verification using the CallPilot Player. To use the telset, you must log into the CallPilot server.
- 2 Save the recording as a WAV file.
- 3 Press the Import button to upload the saved file.

**Note:** You are not able to play existing greeting/personal verification if CallPilot Player is launched from Windows Start menu.

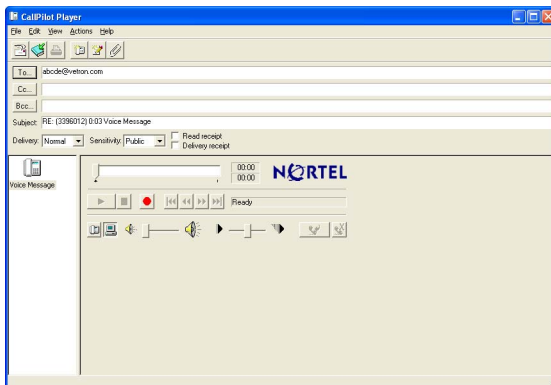
- 4 The Import dialog box appears. This page allows you to select which VBK or WAV-PCM file on the local computer to upload to the CallPilot server. The selected file is uploaded when the Save button is pressed.

The CallPilot Player launched from My CallPilot Greetings page allows you to record and save a recording directly from the player using the player's File-Save menu, skipping the Import step.

You can also play previously recorded greetings or personal verification. However, no

computer playback is available if only your telset is used. Since the player shares the same credentials with My CallPilot, no login to the CallPilot server is necessary. The only requirement is that you do not close the browser window while working with a greeting, or the recording could be lost.

Once you are done with the greeting, you should refresh the Greetings page to update the page content.



## Setting an expiry date

You can also set an expiry date for temporary greetings from the Greetings page. The expiry date/time corresponds to the date/time on the CallPilot server. The expiry date is validated by My CallPilot.

Greetings	Edit	Import	Delete	Recorded
External Greeting				
Internal Greeting				
Temporary Greeting				
Expiry date <input checked="" type="radio"/> No Expiry Date <input type="radio"/> January 1 at 0:00				
Personal Verification				

**OK**

## Removing voice greetings and personal verification

Voice greetings and personal verification can be removed by pressing the Delete button. You must confirm the deletion before the voice greeting or personal verification is removed.

Personal Verification allows you to record your name in your own voice, so callers can

correctly identify you when leaving a voice message.





# Setting up message notification

CallPilot can notify you of new messages when you are away from the office. Your administrator defines whether these devices and services are available to you:

- Remote Text Notification to a wireless e-mail device. See *Appendix A: Remote Text Notification for Microsoft Outlook and BlackBerry Devices*, on page 63.
- Remote Notification to a telephone or pager. This type of remote notification can be set up and turned on or off from your telephone as well. You can set up two time periods for notification, and choose whether you want to be notified of all messages or urgent messages only.

You can have the two types of notification turned on simultaneously.

## Message Notification

You can receive notification of new CallPilot Messages at an email device, or a remote telephone or pager that you define. You can also specify which type of messages you wish to be called for, and define a calling schedule.

### Remote Text Notification

(This feature has not been enabled for your mailbox class.)

### Remote Notification to telephone or pager

Current Status:  On  Off

Notification Device:

Notification Number:

Default Callback Number:

Identification Number:

CallPilot will call this number to deliver notification for selected messages. The information included in the notification call depends on the selections below.

Your 10 digit pager access number. This number is used by some pager services.

Your Pager Identification Number (PIN). This number is used by some pager services.

Notify for:

- All messages  
 Urgent messages

Calling Schedule:

- Any time  
 According to this schedule:

Days:  Monday  
 Tuesday  
 Wednesday  
 Thursday

You control notification by turning it on and off as needed. When notification is on, you will be notified of selected messages that arrive during periods you define.

Friday  
 Saturday  
 Sunday

Time period during active day(s):

First time period:

From  :   
To  :

Time zone: (GMT -06:00) Central Time

Optional second time period:

From  :   
To  :

Notification periods can cross midnight starting on your selected days. If the end time is earlier than the start time, it is assumed to be on the next day. For the entire day, use 00:00 to 00:00.

Save

Cancel

# Setting Up Message Forwarding

Clicking the **Message Forwarding Rule** link loads the **Message Forwarding Rule** page. This page provides the interface to:

- Create a rule
- Delete an existing rule
- Edit an existing rule
- Enable or disable a rule

A rule must be enabled to be active. A new rule is enabled by default. A maximum of one rule per CallPilot mailbox is supported.

OK

## Message Forwarding Rule

CallPilot messages, which meet defined criteria, can be forwarded to a CallPilot mailbox or an external e-mail address. Contact your administrator for information about your organization's security policies regarding forwarding mail externally.

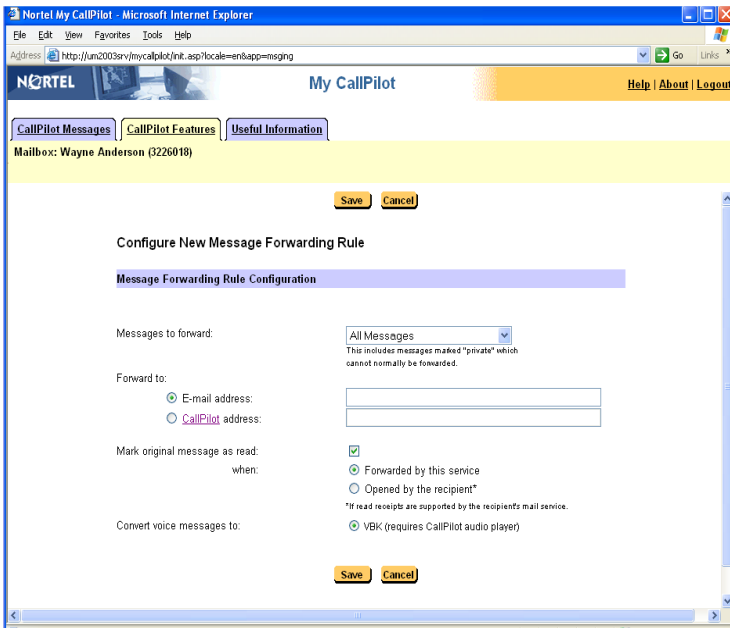
Configure Rule

Enable	Recipient	Convert Voice to WAV	Forward	Delete
<input checked="" type="checkbox"/>	tyouel@acme.com		All Messages	

OK

Clicking the **Configure Rule** button loads the Message Forwarding Rule Configuration page. This page provides the interface to:

- Determine which messages are forwarded
- Enter a single e-mail address or CallPilot address where the message is to be forwarded
- Specify when to mark the original message as Read
- Determine if the voice portion of the message is to be converted to WAV



The supported "Messages to forward" options are:

- All Messages (default selection)
- Voice Messages
- Fax/Text Messages

The recipient can be either an E-mail (default) or CallPilot address. All Message Forwarding Rule options are supported for e-mail addresses. The options Convert voice to WAV-PCM and 'Opened by recipient' are not supported for CallPilot addresses. Also, the WAV PCM selection is grayed if **Fax/Text Messages** is selected.

Only one address is permitted per rule. Simple address validation is performed on the e-mail address. The e-mail address can be a maximum of 255 characters. The address is scanned to ensure the address contains a period and the at (@) sign. The address validation is performed when the user presses the Save button.

CallPilot distribution lists cannot be manually entered here. However, e-mail distribution lists are supported. An E-mail distribution list can be entered as an e-mail address in the Message Forwarding Rule.

The user can also select the CallPilot hyper text link to select or enter a CallPilot address. The CallPilot Address Book dialog box is displayed when the CallPilot link is selected:

OK Cancel

Select Recipient

From: Address Book

Find Name: Find

Names Found:

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You can also create and address manually using the address creation dialogs. PDLs, SDLs, BDLs, telephone numbers and fax addresses are not accepted. Users wishing to forward CallPilot messages to a telephone number should use the CallPilot Remote Notification feature. Users wishing to forward incoming fax messages to a fax number should use the CallPilot Fax Printing feature. An Address creation dialog box is provided for a CallPilot mailbox and for an Open VIPs CallPilot mailbox, as follows:

OK Cancel

Select Recipient

From: Local mailbox

VPIM Network Shortcut: 16139355

Local mailbox:

Local mailboxes are used to send messages to local users on the CallPilot server. They are created and maintained by the system administrator and may be found in the CallPilot Address Book.

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## Enter a Special Address

Address format:

---

### Address Information:

**Remote mailbox:**

**Remote server:**

---

**Voice Profile for Internet Mail (VPIM) addresses are used to send messages to remote users via the intranet/internet. To use VPIM, the CallPilot server must be configured by the system administrator to access the remote server via VPIM.**

---

**Save**

**Cancel**

CallPilot mailboxes can be expressed as follows:

LOCAL: <local VPIM prefix><mailbox>@<local FQDN>

Open VPIM: VPIM=<VPIM shortcut><mailbox>/<remote FQDN>@<local FQDN>

Remote Mailbox: <remote location VPIM prefix><mailbox>@<local FQDN>

If a CallPilot address type other than a CallPilot mailbox or an Open VPIM address is entered, a warning dialog box is displayed when Save is selected from the Configure Message Forwarding Rule page.

If the "Mark original message as read when" check box is checked, the following choices are available:

- Forwarded by this service (default selection)  
The original CallPilot message is marked as read as soon as the message is forwarded to the recipient.
- Opened by recipient

The original CallPilot message is marked as read when the forwarded message is opened by the recipient. The feature makes use of the read receipt capability of the e-mail server to whom the message was forwarded. When the read receipt is received by CallPilot, the original message is marked as read.

**Note:** When the message is opened by the recipient an internal message identification is added to the subject, and permits Message Waiting Indicator (MWI) light to extinguish, when the message is read.

This feature is not supported by CallPilot systems and the option is disabled if a CallPilot address is selected. Also, not all e-mail servers support Read Receipts. Yahoo Mail does not, and Exchange 5.5 requires Service Pack 2 to fully support Read Receipts. You determine if the e-mail system supports Read Receipts. See the following Microsoft Knowledge Base article (KB217160) for an explanation of the issue with Exchange 5.5: <http://support.microsoft.com/default.aspx?scid=http://support.microsoft.com:80/support/kb/articles/q217/1/60.asp&NoWebContent=1>

By default, voice messages are sent in VBK format. You can choose to convert voice messages to WAV. Note that there is currently no CallPilot Player available for Macintosh OS X, Linux, or PDAs. These clients only support WAV playback.

There are advantages to sending messages in VBK format. While the CallPilot Audio Player does need to be installed on the client, you are able to play CallPilot messages over both the telephone and computer speakers, speed up or slow down playback speed, and have a link to My CallPilot. Additionally, the VBK file is three to five times smaller than the same message transcoded to WAV, so the download time and network bandwidth requirements are lower.

# Managing personal distribution lists

A distribution list saves you time when you send messages to the same group of addresses. You can create up to 99 personal distribution lists, and enter a number and name to identify each list. Each personal distribution list can contain up to 200 entries.

A personal distribution list can contain any addresses to which you can send a message, except other personal distribution lists. An entry can be a mailbox number, shared distribution list number, network mailbox, open network mailbox, or telephone number.

You can create personal distribution lists in My CallPilot or on your telephone. These lists are stored for you in the CallPilot Address Book on the CallPilot server. You can access these lists from My CallPilot, Desktop Messaging, and your telephone.

## To edit, delete, or create personal distribution lists

To edit or delete an existing list, select the list and click Edit or Delete. Make the changes, then click Save.

To create a personal distribution list, click Add New List. Type a number and name for the list. Add entries by selecting an address format from the drop-down list, then enter the information required. Refer to the online Help for the correct addressing formats, if required. Click Save.

**OK**

### Personal Distribution Lists

CallPilot messages addressed using distribution lists are sent to all people in the list. Distribution lists (up to 99) are addressed by their list number in outgoing messages.

Existing Personal Distribution Lists: **Add New List**

Number	Name	Number of Members	Edit	Delete
Number	Name	Number of Members	Edit	Delete

**Add New List**

---

**Save** **Cancel**

### Personal Distribution Lists - Edit

**Personal Distribution List Information**

Number:  Name:

**Add/Remove Members**

Add:

Find:

Be:

Be:

Be:

**Personal Distribution List Members:**

- 3397240@ptord0hd.ca.nortel.com

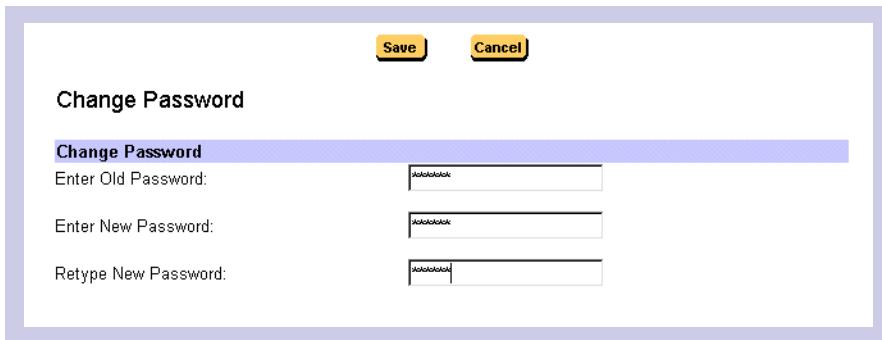
## Changing your CallPilot password

---

Your CallPilot password is the same password that you use to log in to CallPilot from the telephone. CallPilot requires that you change your password on a regular schedule set by your administrator.

CallPilot prevents you from using some passwords if they are too short or too simple, or if you have used the same one recently. Keep your mailbox secure by choosing passwords that are not easily discovered.

To change your password, type your old password, type your new password twice, then click Save.



The screenshot shows a web form titled "Change Password" with a light blue border. At the top right of the form area are two yellow buttons: "Save" and "Cancel". Below the title is a blue horizontal bar with the text "Change Password" in white. The form contains three rows of input fields:

- Row 1: "Enter Old Password:" followed by a text input field containing "AAAAAAAA".
- Row 2: "Enter New Password:" followed by a text input field containing "AAAAAAAA".
- Row 3: "Retype New Password:" followed by a text input field containing "AAAAAAAA".



# Changing your telephone options

---

## To assign a custom operator number for callers

You can offer your callers the option of leaving a message or speaking to one of your assistants or colleagues. In your greeting, tell callers to press zero if they wish to speak to this person in your absence. The custom operator number is the number your callers reach when they press zero. Enter the number in Telephone Options.

## To set times and options for blocking messages from callers

You can temporarily prevent your callers from leaving messages in your mailbox. You can choose to transfer callers to your custom operator, or disconnect them. As a courtesy to your callers while Message Blocking is turned on, record a temporary greeting that provides details of your absence and tells callers what to do. Select the settings in Telephone Options.

## To turn Auto Login on or off and define allowed numbers

When Auto Login is turned on, you do not have to enter your mailbox and password when you log in from a defined number. Your administrator defines secure numbers for Autologin, such as your office or home telephone. When Autologin is turned on, you access your mailbox by dialing the CallPilot access number or pressing the message key at one of your defined Autologin numbers. To turn on Autologin, check the box in Telephone Options.

**Save** **Cancel**

**Telephone Options**

---

**For Callers**

Custom Operator Number:  This is the number of the person your callers reach when they press 0.

Block callers from leaving messages:

Blocked callers will be played the greeting, then

Transferred to custom operator

Disconnected

---

**When logging in**

Turn on Auto Login for allowed numbers      Auto Login allows you to bypass mailbox and password entry when logging in from secure telephones

Number	Auto Login Allowed
8052	<input type="checkbox"/>

Message waiting indicator at telephone:

Number	Enabled
8052	<input checked="" type="checkbox"/>
8055	<input type="checkbox"/>

**Save** **Cancel**

## To enable or disable Message Waiting Indicator Dialing Numbers

Message Waiting Indicator Dialing Numbers (MWI DN) are assigned by the administrator. The mailbox subscriber is not allowed to change the numbers. However, the mailbox subscriber can see these MWI DNs in the Telephone Options section, and can enable or disable them individually. Only non-empty MWI DNs are displayed.

# Setting up telephone access to e-mail

To set up access to your e-mail accounts from CallPilot, see *Setting up links to your e-mail accounts*, on page 53. You can specify one of these e-mail accounts for telephone access so that you can check for new e-mail messages while logged in to CallPilot from your telephone. You can have the text content of any new e-mail messages read to you over the telephone.

## To set up an e-mail account for telephone access

- 1 Open the E-mail By Phone page. Your e-mail account links are displayed.
  - ▶ To set up or edit a mailbox link, click Configure New Mailbox Link. See *To set up an e-mail link*, on page 53.
- 2 Select one e-mail account for access by telephone.
- 3 Select a female or male voice to read your e-mails.
- 4 Click OK.

### E-mail By Phone

CallPilot allows you to listen to e-mail messages in one of your linked e-mail account folders when you log in using the telephone.  
When you are logged in using the telephone, switch to your e-mail message list by pressing 8-9.

**Mailbox link selection and voice configuration**

Use voice of:

Select mailbox link for E-mail by Phone: **Configure New Mailbox Link**

Enable	Enabled for My CallPilot	Mailbox Server	Folder	User Name	Edit	Delete
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Exchange	INBOX	timster		

**OK**

### Edit Mailbox Link Configuration

**Mailbox link configuration**

Mailbox server:

E-mail By Phone Folder (e.g. INBOX):

E-mail address:

Mailbox user name:

Mailbox password:

# Changing fax printing options

---

If your CallPilot mailbox has fax messaging capability, you can receive a fax message in your mailbox and print the fax at a selected fax number. Set options for default fax number, Auto printing, and print cover page on the Fax Printing page.

## To change the default printer

You must set a default fax number. If you are not using Auto printing, a default fax number is the simplest way to print. The default number can be any fax number that CallPilot can dial, including any normally required prefixes.

## To turn Auto printing on or off

When Auto printing is turned on, any faxes that arrive at your mailbox are automatically printed at a specified default fax number. A message that has been auto printed remains in your mailbox so that you can reprint the message or forward the message. Your printed faxes can be deleted automatically from your mailbox on a schedule set by your administrator.

Auto printing is the most convenient way to handle fax messages while you are in one location. If you are away from your office, you can turn Auto printing off and print your faxes at another fax number.

## To turn fax separator page printing on or off

You can select whether to print a fax separator page when you print a fax message. A separator page identifies you and gives details of the print job, such as the number of pages. Separator pages are useful if you receive faxes without cover pages. If the sender of the fax includes a header page with the fax, the header page also prints.

Save Cancel

### Fax Printing

**Fax Messages Printing**

Default fax number for printing:

Auto Print new fax messages as received

Print a separator page with each printout

# Setting up links to your e-mail accounts

---

You can set up links in CallPilot so that you can check your e-mail for new messages. You can also forward and reply to messages, and send new e-mails.

You can define up to five e-mail accounts. One of these accounts can be set up for access from your telephone. See *Setting up telephone access to e-mail*, on page 51. The selected account shows a check mark under Enabled for E-Mail By Phone.

## To set up an e-mail link

- 1 On the Mailbox Links page, click **Configure New Mailbox Link**.
- 2 Select your e-mail server from the drop-down list. To get this name, look in the account settings of your e-mail application, or ask your administrator.
- 3 Type a name for this account to display on the tab.
- 4 Type the name of the folder to access for your e-mail messages, such as Inbox.
- 5 Type your e-mail address.
- 6 Type your mailbox user name (the User ID of your e-mail account).
- 7 Type the password for this e-mail account.
- 8 Retype the password for this e-mail account to verify the password.
- 9 Click **Save**. The password is encrypted for security.

You can edit this information at any time, or delete the account.

Remember that whenever you change your e-mail password, you must change the



password in My CallPilot as well.

## Mailbox Links

CallPilot allows linked mailbox folders to be viewed in one place when logging in to My CallPilot. One of these e-mail account folders may also be accessed through the telephone in the E-mail By Phone feature.

Select mailbox links to display:

[Configure New Mailbox Link](#)

Display	Enabled for E-mail By Phone	Name to Display	Mailbox Server	Folder	User Name	Edit	Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	TBender	Todd's Exchange Server	InBox	TBender		

[OK](#)

[Save](#)

[Cancel](#)

## Edit Mailbox Link Configuration

### Mailbox link configuration

Mailbox server:	<input type="text" value="Exchange"/>
Name to Display (on Tab):	<input type="text" value="Email Account"/>
Mailbox Folder (e.g. INBOX):	<input type="text" value="INBOX"/>
E-mail address:	<input type="text" value="tim@bigcompany.com"/>
Mailbox user name:	<input type="text" value="timster"/>
Mailbox password:	<input type="password"/>

## To configure an external e-mail server

My CallPilot supports various settings when configuring an external e-mail server. Some of these settings are configured in CallPilot Manager, while others are specified in My CallPilot. This allows My CallPilot to work correctly in situations where the user's corporate IMAP, SMTP and LDAP servers are on different hosts.

The settings include the host/IP address and port number of the SMTP server, and numerous external LDAP server settings. Consult your administrator if you are required to change these settings and are uncertain of the appropriate entries.

**Note:** If the corporate e-mail servers (IMAP, SMTP, and LDAP) support SSL (Secure Port), the administrator should check the corresponding "This server requires a secure connection" check box to ensure that CallPilot Manager also uses SSL.

- 1 On the Mailbox Links page, click **Configure New Mailbox Link**. The Configure New Mailbox Link page opens.

## Configure New Mailbox Link

### Mailbox link configuration

Mailbox server:	Corp. server ▾
Name to Display (on Tab):	My email server
Mailbox Folder (e.g. INBOX):	INBOX
E-mail address:	mmeyers@widget.com
Mailbox user name:	mmeyers
Mailbox password:	••••••••
Confirm password:	••••••••
This server requires a secure connection:	<input type="checkbox"/>

### Outgoing mail server (SMTP)

Hide Details

This server requires a username & password:	<input type="checkbox"/>
Mailbox user name:	<input type="text"/>
Mailbox password:	<input type="password"/>
Confirm password:	<input type="password"/>
This server requires a secure connection:	<input checked="" type="checkbox"/>

### Directory service (LDAP)

Hide Details

This server requires a username & password:	<input type="checkbox"/>
Mailbox user name:	<input type="text"/>
Mailbox password:	<input type="password"/>
Confirm password:	<input type="password"/>
This server requires a secure connection:	<input checked="" type="checkbox"/>

- 2 Select your e-mail server from the drop-down list. To get this name, look in the account settings of your e-mail application, or ask your administrator.
- 3 Type a name for this account to display on the tab.
- 4 Type the name of the folder to access for your e-mail messages, such as Inbox.
- 5 Type your e-mail address.
- 6 Type your mailbox user name (the User ID of your e-mail account).
- 7 Type the password for this e-mail account.
- 8 Retype the password for this e-mail account to verify it.
- 9 In the Outgoing mail server (SMTP) block, check the **This server requires a user name and password** logon box.
- 10 Type your mailbox user name (the User ID of your e-mail account).
- 11 Type the password for this e-mail account.
- 12 Retype the password for this e-mail account to verify the password.

- 13 In the Directory service (LDAP) block, check the **This server requires a user name and password** logon box.
- 14 Type your mailbox user name (the User ID of your e-mail account).
- 15 Type the password for this e-mail account.
- 16 Re-type the password for this e-mail account to verify it.
- 17 Click **Save**.

These settings allow My CallPilot to be configured easily to work in nearly any corporate e-mail environment. The LDAP text boxes, in particular, allow for the external Address Book searching feature. Note that you do not have the ability to specify the port numbers; these are defined by the administrator in CallPilot Manager.

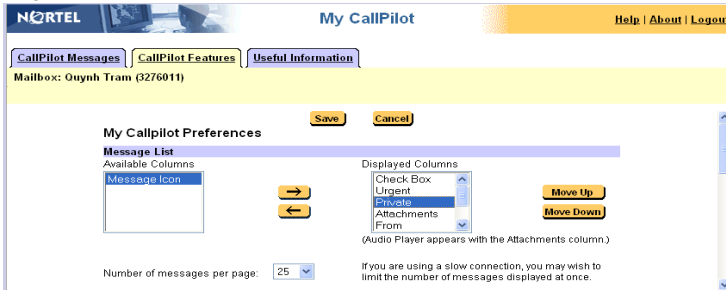
**Note:** To log in anonymously uncheck **This server requires a user name and password**, for both SMTP and IMAP.



# Setting messaging preferences

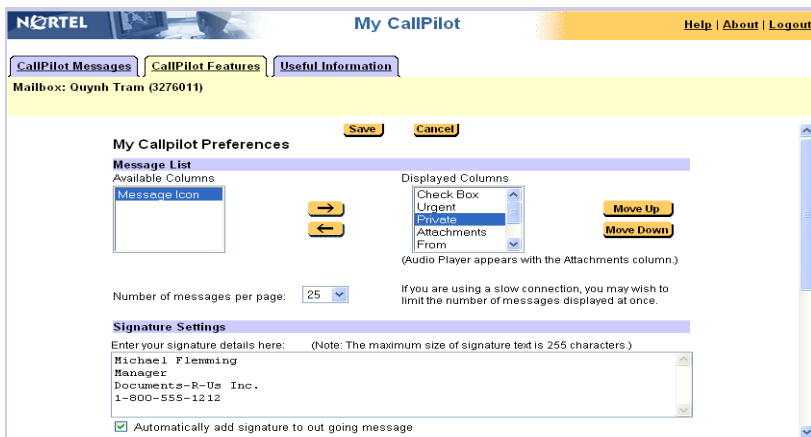
## To change Message List columns

You can change the columns in your Message List. The Attachments option must be in the Displayed Columns list to see the embedded player (Windows only) in your Message List.



## To add a signature

Type or paste your signature and other information, then click the check box if you want this signature added automatically to outgoing text messages.



## To change environment settings

Change any of these My CallPilot settings to your preferences.

The screenshot shows the 'My CallPilot' interface. At the top left is the Nortel logo. In the center is the text 'My CallPilot'. At the top right are links for 'Help | About | Logout'. Below this is a navigation bar with three tabs: 'CallPilot Messages', 'CallPilot Features', and 'Useful Information'. A yellow banner below the tabs displays 'Mailbox: Quynh Tram (3276011)'. The main content area is titled 'Environment Settings' and contains several options:

- Show BCC while composing
- Show Priority, Sensitivity, Read Msg Notification
- Message Read Notification is checked
- Confirm when messages are sent
- Confirm deletions
- Remove Deletable items on logout

Additional settings include:

- Check for new messages every: 10 minutes
- Automatically logout after: 20 minutes
- Audio: Standard (WAV)
- Number to call for terset playback (ie. your phone): 3276011

At the bottom of the settings area are 'Save' and 'Cancel' buttons. A yellow footer bar at the very bottom contains the text 'Copyright © 2005 Nortel'.

**Note:** The Remove Deletable items on Logout check box applies to both regular e-mail messages as well as messages you access when using e-mail by Phone. This check box must be selected to enable the removal of messages that you have deleted when you logout.

## Macintosh Preferences window

The Preferences option under the Edit menu allows the following user settings to be saved for the CallPilot Player application on the Macintosh.

The screenshot shows a 'Preferences' dialog box with two main sections:

- Audio Device:** Includes radio buttons for 'Telephone', 'Macintosh', and 'Let me choose for each message'. The 'Macintosh' option is selected. Below it is a checkbox for 'Always record via:' with a dropdown menu set to 'External Mic'. The 'Telephone' option has a 'Number to call:' text field with '2548' entered.
- Settings:** A list of four checked checkboxes: 'Remember window positions', 'Remember volume level', 'Start playback automatically', and 'Use Secure Socket Layer (SSL)'.

At the bottom of the dialog are 'Cancel' and 'OK' buttons.

The defaults are: Macintosh audio device, all settings checked.

**Note:** You may see the Audio Device section "grayed out." This happens if the Mailbox class is set to restrict you to a specific device (telephone or PC/Mac).

# Choosing a home page for My CallPilot

---

Choose the page that you want to display automatically when you log in to My CallPilot.

Save Cancel

**My CallPilot Home Page**  
Choose your default home page.

**Available CallPilot pages:**

- CallPilot Mailbox
- CallPilot Features
- Useful Information

# E-mail tab

While you are logged in to My CallPilot, you can check your e-mail messages. You can forward and reply, and send new e-mails. See *Setting up links to your e-mail accounts*, on page 53.

You can access up to five IMAP e-mail accounts, or other CallPilot mailboxes. One of these accounts can be set up for access from your telephone. See *Setting up telephone access to e-mail*, on page 51.

You can also set up access to a second CallPilot mailbox, which can be on another server. For setup details, refer to the online Help.

Each e-mail tab shows the name of the account associated with that tab.



## To open a message

To open an e-mail message in My CallPilot, click the icon in the Attachments column beside the message, or click any underlined part of the message line.

## To delete a message

To mark an e-mail message for deletion, select the message and click **Delete**. To ensure that deleted messages are permanently deleted, open the My CallPilot Preferences page, and in Environment Settings, check the Remove Deletable items on logout check box.

## To compose and send a new message

To compose a new e-mail message, click Compose, type the message, and send the message the same way as a CallPilot message. The Address Book is not available.

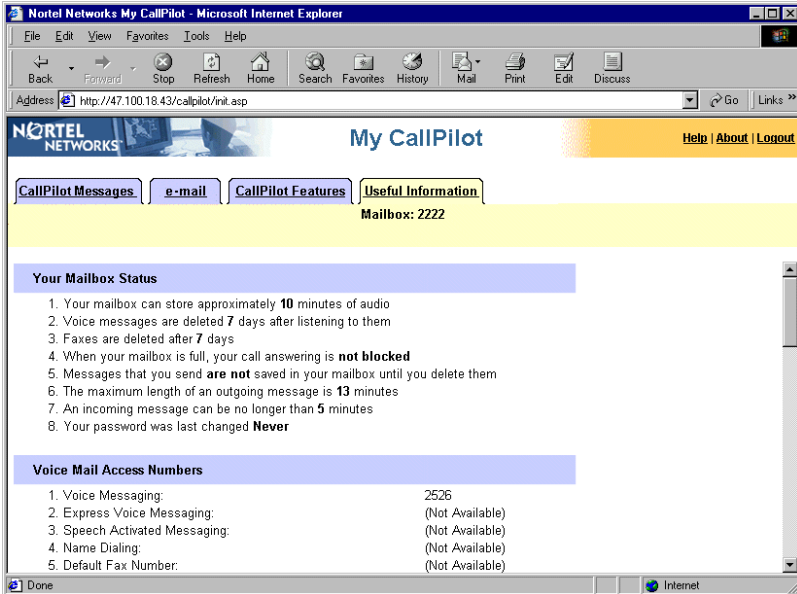
## To forward and reply to messages

You can forward and reply to e-mails in the same way as CallPilot messages, except that the Address Book is not available.

# Useful Information tab

Click the Useful Information tab to:

- View status and details about your mailbox.
- View online user guides.
- Print online user guide files on your laser printer.



# Protecting the security of your mailbox

---

Because My CallPilot is a web-based product, it is important to take precautions to protect the security of your mailbox.

- If your administrator has enabled SSL encryption, you can use the Secure Login feature for greater security. See *To log in using secure login*, on page 14.
- When you have finished using My CallPilot, make sure that you log out. If you go to a web site outside of My CallPilot without logging out, CallPilot does not log out immediately. This can make your CallPilot information vulnerable to hackers. If you want to visit a web site without exiting My CallPilot, use a separate browser window to view the other site.
- You can set CallPilot to log out automatically after a short time, such as 5 or 10 minutes. See *Setting messaging preferences*, on page 57.
- If you use a public or shared workstation, avoid using the Remember Password option when you log in to My CallPilot. If this option is selected, others can access your CallPilot mailbox.
- If you use a public or shared workstation, you should empty the browser cache after a CallPilot session. For information about your browser cache, see your browser online Help.

## Appendix A: Remote Text Notification for Microsoft Outlook and BlackBerry Devices

---

Remote text notification can be configured to send a message to your SMTP e-mail account when a new voice, fax, or text message arrives in your CallPilot mailbox. You can set up notification to any e-mail server that supports SMTP. These include most e-mail accounts, wireless handheld organizers, mobile phones, or PDAs like the Research In Motion BlackBerry.

To set up My CallPilot for remote telephone or pager notification, see *Setting up message notification*, on page 41.

This section describes how to set up remote text notification for Microsoft Outlook and BlackBerry devices. Any device or portal with a service provider that supports SMTP can receive e-mail notification messages. If you plan to use another type of device to receive remote text notification, ask your CallPilot administrator about any additional setup that is required for your device.

To receive notification messages on a Research In Motion (RIM) BlackBerry Internet Edition device, you must configure Microsoft Outlook and BlackBerry Desktop Manager (version 2 or later) to forward CallPilot notification messages to your BlackBerry device.

If you use a BlackBerry Enterprise Edition device, your administrator can set up notification message forwarding for you on the e-mail server or configure BlackBerry Desktop Manager to redirect CallPilot notification messages.

**Note:** If you set up My CallPilot to send CallPilot notification to your Outlook Inbox, and set up BlackBerry Desktop Manager to send all incoming messages to your BlackBerry device, your CallPilot notification messages appear in your list of e-mails on your BlackBerry device with no additional configuration required.

### Notification message format

An e-mail notification message can show the:

- type of message
- name of the person who left the message, if available
- telephone number, if available

For example, John Smith calls from extension 1234 and leaves a voice message for Andrew Jones. An e-mail message is sent to Andrew Jones with the following text:

You have a voice message from John Smith [1234]

Microsoft Outlook forwards this e-mail message to Andrew's BlackBerry device. The message appears with the subject CallPilot Notification. Once Andrew receives the message, he can decide whether to retrieve the message from CallPilot or to call John immediately, using a telephone.

# Getting started with remote text notification

---

## Requirements

- You need a BlackBerry device. Ensure that e-mail service on your BlackBerry device is working.
- Microsoft Outlook must be installed. Currently, BlackBerry Desktop Manager only works with Microsoft Outlook. Consult your BlackBerry documentation for information about other e-mail clients.
- BlackBerry Desktop Manager 2 or later must be installed and running on your computer.
- Remote text notification capability must be enabled and set up for your mailbox by your CallPilot administrator.
- Remote text notification must be configured and enabled in My CallPilot. For more information, see *Setting up message notification*, on page 41.

## Configuration steps

Complete the following steps to effectively manage e-mail notification messages.

Step	Reference
Create a holding folder for your e-mail notification messages so that they are stored separately from your other messages.  If you want to forward all messages in your Outlook inbox to your BlackBerry device, you can skip this step.	"Creating a notification holding folder" on page 65
Configure BlackBerry Desktop Manager to forward messages to your BlackBerry device.	"Configuring BlackBerry Desktop Manager" on page 68
If desired, configure Outlook to delete old CallPilot notification messages automatically from the holding folder.  Alternatively, you can manually delete notification messages from the holding folder.	"Automatically removing notification messages" on page 69



## Creating a notification holding folder

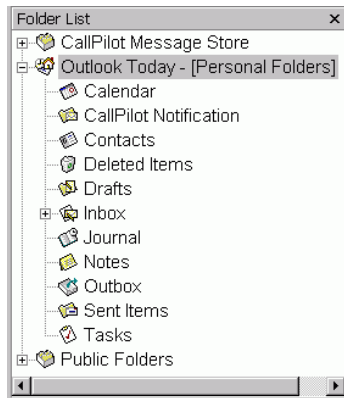
---

You can create a holding folder for your CallPilot e-mail notification messages so that they are stored separately from your other messages. To store messages in the folder, follow these steps:

- 1 Create an Outlook folder for the notification messages.
- 2 Configure Outlook to route CallPilot notification e-mail messages to the folder using the Rules Wizard.

### To create a notification folder

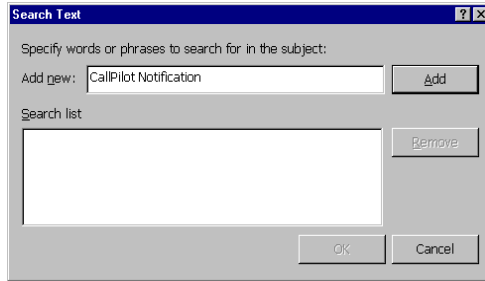
- 1 Start Outlook.
- 2 In the Folder List, select **Outlook Today**.
- 3 From the File menu, choose **New > Folder**. The Create New Folder dialog box appears.
- 4 In the Name box, type CallPilot Notification, and then click **OK**. The CallPilot Notification folder appears in the Folder List.



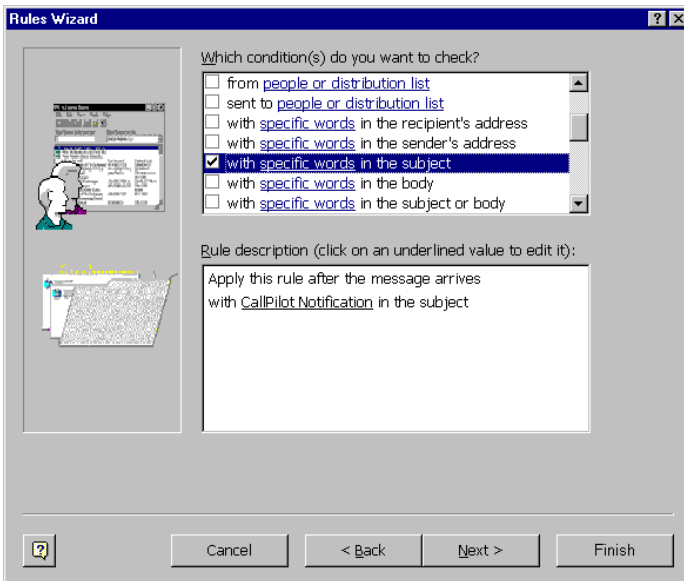
### To route notification messages to the holding folder

- 1 Choose **Tools > Rules Wizard**. The Rules Wizard dialog box appears.
- 2 Click **New**. The first panel of the Rules Wizard appears.
- 3 In the list of rule types, select **Check messages when they arrive**, and then click **Next**.
- 4 In the list of rule conditions, check **With Specific** words in the subject box.

- 5 In the Rule description box, click **Specific Words**. The Search Text dialog box appears.

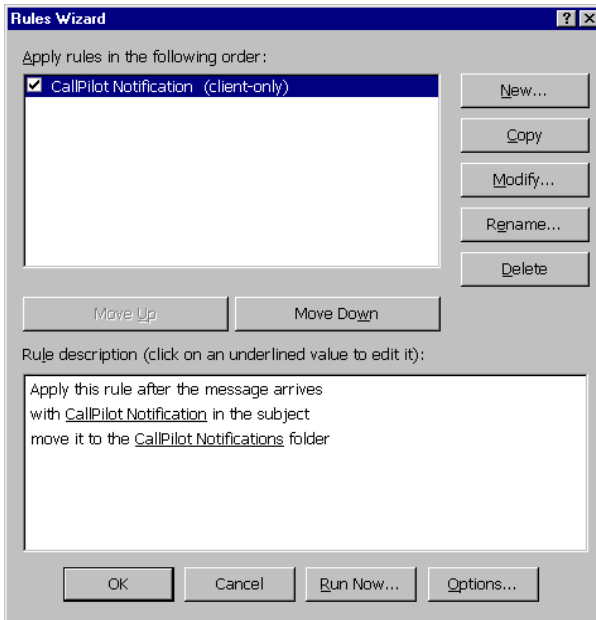


- 6 In the Add new box, type **CallPilot Notification**.
- 7 Click **Add**. The text “CallPilot Notification” is added to the Search list box.
- 8 Click **OK**. The search text “CallPilot Notification” appears in the rule description.



- 9 Click **Next**.
- 10 In the list of actions, check the **move it to the specified folder** box.
- 11 In the Rule description box, click **Specified**. A list of Outlook folders appears.
- 12 In the folder list, choose **CallPilot Notification**, and then click **OK**. The folder name appears in the rule description.

13 Click **Finish**. The finished rule is shown below:



14 Click **OK** to close the Rules Wizard.

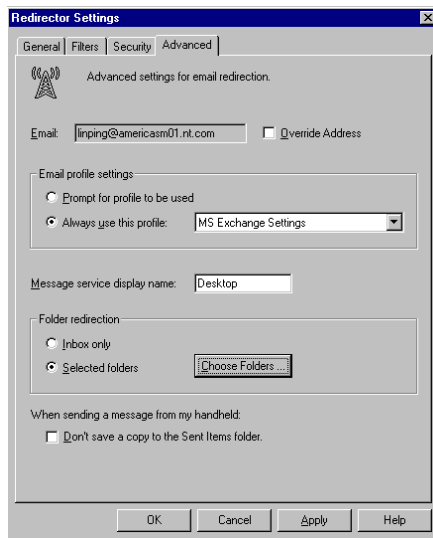
# Configuring BlackBerry Desktop Manager

This section explains how to configure BlackBerry Desktop Manager to redirect your e-mail notification messages.

If you did not create a holding folder for notification messages, and if you already configured BlackBerry Desktop Manager to forward messages in your Outlook inbox, you can skip this section.

## To configure e-mail redirection

- 1 From the Windows Start menu, choose Programs > BlackBerry > Desktop Manager. BlackBerry Desktop Manager appears.
- 2 In the application list, double-click Redirector Settings. The Redirector Settings dialog box appears.
- 3 Click the Advanced tab.



- 4 In the Folder redirection section, choose Selected folders.
- 5 Click Choose Folders... . The Choose Folders dialog box appears.
- 6 Select the folders where you receive messages that you want to redirect to your BlackBerry device.
  - ▶ To redirect messages in your holding folder, select the CallPilot Notification folder.
  - ▶ To redirect all messages in your Outlook inbox, select the Inbox folder.
- 7 Click Save to save your folder selection.
- 8 Click OK to save your redirection options.
- 9 Exit BlackBerry Desktop Manager.

## Automatically removing notification messages

---

This section explains how to configure Outlook to remove messages automatically from the CallPilot Notifications holding folder using the AutoArchive feature. If you do not want Outlook to delete notification messages automatically, you can manually delete them from the folder.

### ATTENTION

---

If you currently do not use AutoArchive, ensure that you become familiar with this feature before you activate it. You can have existing folders with AutoArchive settings that have never been activated. If you activate AutoArchive to delete messages automatically from the CallPilot Notifications folder, you may find that messages in other folders are being archived as well.

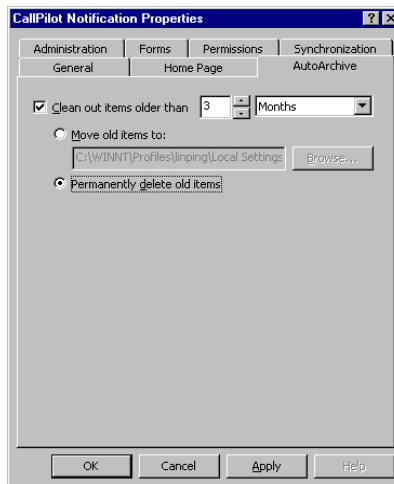
If you are unsure about what to do, check with your local Microsoft Outlook support group.

You must perform two steps to configure automatic deletion of notification messages:

- 1 Set up AutoArchive to delete messages from the CallPilot Notifications folder.
- 2 Activate the AutoArchive feature.

### To set up deletion of notification messages

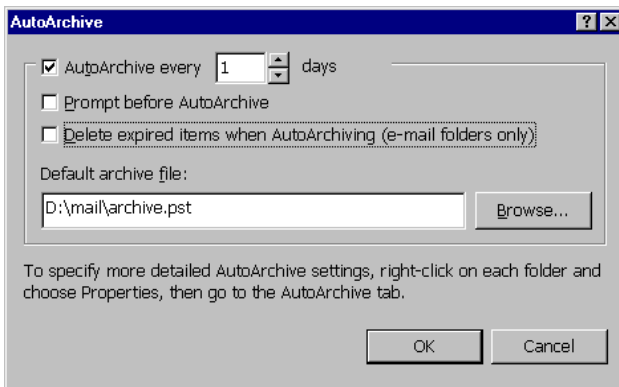
- 1 In the Outlook Folder List, right-click the **CallPilot Notifications** folder, and then choose **Properties**. The CallPilot Notification Properties dialog box appears.
- 2 Click the **AutoArchive** tab.



- 3 Select the **Clean out items older than** check box.
- 4 Set the time to 1 day.
- 5 Select **Permanently delete old items**.
- 6 Click **OK**.

### To activate AutoArchive

- 1 In Outlook, choose **Tools > Options**.
- 2 Click the **Other** tab.
- 3 Click **AutoArchive**. The AutoArchive dialog box appears.



- 4 Check the AutoArchive every... box and set the frequency to 1 day.
- 5 Click **OK** to close the dialog box.
- 6 Click **OK** to close the Options dialog box.

## CallPilot Desktop Messaging User Guide for My CallPilot

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Date: July 2005



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