



Desktop Messaging and My CallPilot Installation Guide

CallPilot
Release 4.0

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Chapter 1

How to get Help

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

Getting Help from the Nortel Web site

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

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

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

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

Getting Help over the phone from a Nortel Solutions Center

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

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

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

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

Getting Help from a specialist by using an Express Routing Code

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

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

Getting Help through a Nortel distributor or reseller

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

Chapter 2

Desktop Messaging and My CallPilot installation

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Section A: Desktop Messaging: Getting started

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Product overview

Introduction

This guide describes how to install Desktop Messaging and My CallPilot*.

Desktop Messaging

Desktop Messaging is a unified messaging application that works with an e-mail client. Desktop Messaging provides a single graphical interface to manage CallPilot voice, fax, text, and e-mail messages.

My CallPilot

My CallPilot is a web-based portal that provides access to CallPilot messages and mailbox configuration over the Internet. My CallPilot includes the following components:

- **CallPilot Messages** — Send, receive, and manage CallPilot messages and e-mail messages.
- **CallPilot Features** — Set mailbox and messaging options.
- **Useful Information** — View mailbox status, dialing numbers, support contact information, and online user guides for CallPilot.

Providing access to user documentation

All user guides for CallPilot 4.0 are in Adobe PDF format only. When you install My CallPilot, mailbox owners can access the user guides from the Useful Information section of My CallPilot.

If you do not install My CallPilot, copy the user documentation from the CallPilot Documentation CD-ROM to a location in your network that is accessible to all CallPilot mailbox owners.

More information

For additional information about Desktop Messaging and My CallPilot, refer to the following CallPilot documentation:

For information about	Refer to the following sources:
<ul style="list-style-type: none">■ configure client software■ configure servers after installation■ troubleshoot desktop messaging and My CallPilot problems	<i>the Desktop Messaging and My CallPilot Administration Guide</i> (NTP 555-7101-503)
learning how to use Desktop Messaging and My CallPilot	<ul style="list-style-type: none">■ user documentation on the CallPilot documentation CD-ROM■ Desktop Messaging online Help■ My CallPilot online Help

Related information products

Introduction

The following CallPilot technical documents are stored on the CD-ROM that you received with your system. The documents are also available from the following sources:

- CallPilot Manager
- My CallPilot
- the Nortel Partner Information Center (PIC) at <http://www.nortel.com/pic>

You require a user ID and password to access the PIC. If you do not have a PIC account, click Register to request an account. It can take up to 72 hours to process your account request.

You can print part or all of a guide, as required.

Planning and migration guides

Use these guides before you install CallPilot to help plan your system, or to plan a migration of data from Meridian Mail^{*} to CallPilot:

Document titles	NTP number
<i>Planning and Engineering Guide</i>	555-7101-101
<i>Meridian Mail to CallPilot Migration Utility Guide</i>	555-7101-801

Installation and configuration guides

The guides listed here describe how to install the following:

- CallPilot server hardware and software
- Desktop Messaging and My CallPilot software

Administration guides

The following guides provide specialized information to help you configure, administer, maintain, and use CallPilot:

Document titles	NTP number
<i>Administrator’s Guide</i>	555-7101-301
<i>Reporter Guide</i>	555-7101-310
<i>Application Builder Guide</i>	555-7101-325
<i>Desktop Messaging and My CallPilot Administration Guide</i>	555-7101-503

Networking guides

The following guides describe how to plan, install, set up, and troubleshoot the CallPilot networking services:

Document titles	CallPilot release	NTP number
<i>Network Planning Guide</i>	4.0	555-7101-102

Note: For instructions on how to configure the networking services on CallPilot, refer also to the CallPilot Manager online Help.

End user guides

The following guides are intended for CallPilot end users, such as phone set users and Desktop Messaging users:

Document titles

Unified Messaging What's New Card

Unified Messaging Quick Reference Card

Unified Messaging Wallet Card

Menu Interface Quick Reference Card

Alternate Command Interface Quick Reference Card

Command Comparison Cards

Multimedia Messaging User Guide

Speech Activated Messaging User Guide

Desktop Messaging User Guides

(available for Microsoft Outlook, Lotus Notes, Novell GroupWise, and Internet Client)

Audio Conferencing Quick Reference Card

My CallPilot User Guide

Troubleshooting

The *CallPilot Troubleshooting Reference* describes problems that can appear on all CallPilot server platforms, and describes ways to resolve them.

The *CallPilot Troubleshooting Reference* is written for Nortel distributors and technical support representatives; therefore, it is not part of the customer documentation package. It is continually being updated by Nortel and is available from the Nortel Partner Information Center (PIC) at: <http://www.nortel.com/pic>.

You require a user ID and password to access the PIC. If you do not have a PIC account, click Register to request an account. Up to 72 hours may be required to process your account request.

Note: If you are not a Nortel distributor, then contact your Nortel technical support representative for assistance.

Using online sources

CallPilot administration online Help

The CallPilot Manager and CallPilot Reporter software contain administration online Help areas that provide access to technical documentation in Acrobat PDF format and online Help topics in HTML format.

To access online information, use either of the following methods:

- Click the orange Help button at the top of any page to access the Administration Help area.
- Click the gray Help button on any page to display a topic that relates to the contents of the page.

For more information about using these Help systems, access the CallPilot Manager Help, open the Getting Started book, and click “Navigating CallPilot Manager Help.”

The Application Builder software contains a Windows Help system as well as context-sensitive help (available by clicking the Help (?) button and then a field or label).

CallPilot end user online Help

Online user guides in Acrobat PDF format are also available from the Useful Information online Help.

To access online Help for the currently selected My CallPilot tab, click the Help link on the upper-right corner of the My CallPilot page.

Desktop Messaging provides product-specific Windows Help for groupware clients (Microsoft Outlook, Novell GroupWise, and Lotus Notes). The stand-alone version of CallPilot Player also provides addressing and troubleshooting information for Internet mail clients.

Contacting technical support

Contact your distributor's technical support organization to obtain any required assistance with your system.

Contacting Nortel

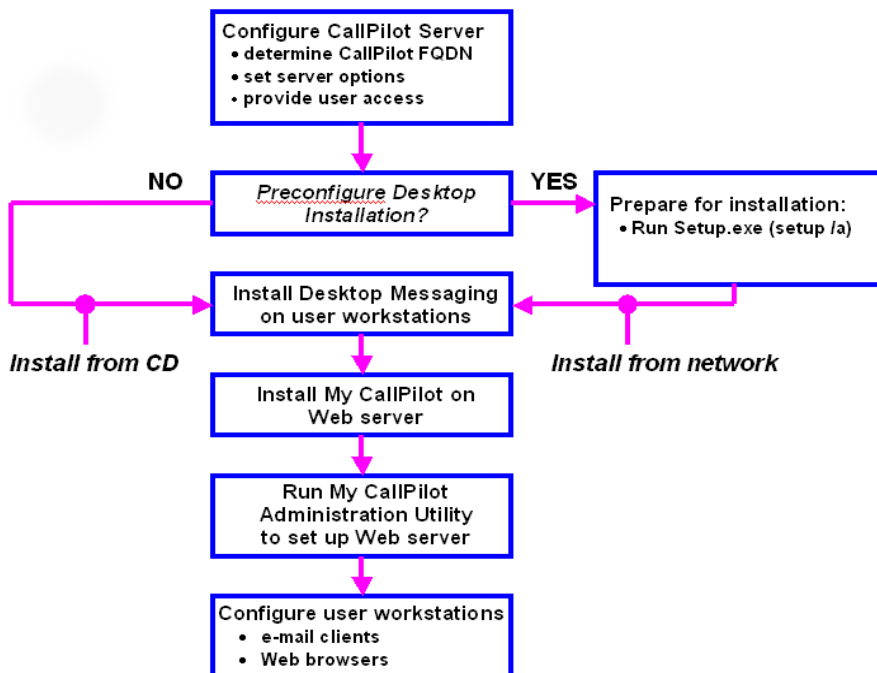
If you have comments or suggestions for improving CallPilot and its documentation, contact Nortel at the following web site address:

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

Installation overview

Installation process

Use the following diagram with the Pre-Installation Checklist on page 26 to help you prepare for Desktop Messaging and My CallPilot installation:



Compatibility

CallPilot Desktop Messaging 4.0 works with CallPilot 2.0, 2.5, 3.0, and 4.0 servers. For details about feature availability, refer to the *Desktop Messaging and My CallPilot Administration Guide* (NTP 555-7101-503).

Pre-installation Checklist

To help you prepare for installation, complete the checklist below, and then refer to it as you install and configure Desktop Messaging and My CallPilot.

Server settings for Desktop Messaging

Method for resolving CallPilot FQDN

☐ DNS ☐ HOSTS file ☐ CLAN IP only

CallPilot server FQDN _____ CLAN IP _____

LDAP server settings

☐ search base _____

☐ I am using a separate LDAP server (only supported with groupware clients)
FQDN or IP address _____

VPIM Network shortcut

If you have multiple NMS locations, define a prefix for each location.

My CallPilot URL

Based on the web site name and virtual directory specified below

Example: http://messages.mycompany.com/callpilot

Additional server settings for My CallPilot

IMAP e-mail servers available for telephone or web access to e-mail

Record the following information for each server you plan to use:

	Server Name	IP Address	E-mail server type
Server 1	_____	_____	_____
Server 2	_____	_____	_____
Server 3	_____	_____	_____
Server 4	_____	_____	_____
Server 5	_____	_____	_____

Web site name

☐ Use default ☐ Other _____

Alias name of the virtual directory for My CallPilot

Obtain the alias name from the IS administrator.

☐ Use default (My CallPilot) ☐ Other _____

User Administration**User access rights**

- ☐ Desktop messaging mailbox class is created with appropriate privileges.
- ☐ Desktop messaging Restriction Permission List is defined as required.

Additional software requirements

- ☐ Supported e-mail client is installed for Desktop Messaging.
- ☐ Supported web browser is installed for My CallPilot.

Section B: Configuring the CallPilot server

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Defining the CallPilot server FQDN

When you configure Desktop Messaging clients, you must specify the CallPilot server fully qualified domain name (FQDN) so that e-mail clients and other servers can locate the CallPilot server.

There are three main steps in defining the CallPilot server FQDN:

1. Determine the currently defined FQDN for the CallPilot server.
2. Determine the type of domain name resolution method your organization uses, and confirm that it is set up correctly.
3. Specify the CallPilot server FQDN in CallPilot Manager.

The following subsections describe these steps.

To determine the CallPilot server FQDN

- 1 Verify with your IS administrator what the CallPilot server's FQDN *should* be.
- 2 On the CallPilot server, click **Start** button.
Result: The Start Menu appears.
- 3 Click on **Control Panel**.
Result: The Control Panel opens.
- 4 Double-click on **System**.
Result: The System dialog box appears.
- 5 Click the **Computer Name** tab.
Result: The computer name appears.
- 6 Click on the **Change** button.
Result: The computer name change dialog box appears.

- 7 Click the **More** button.

Result: The primary DNS suffix is displayed. When combined, the host name and the domain name form the FQDN.

Example: The host name “compass” and the domain name “acme.com” combine to form the FQDN “compass.acme.com”.

- 8 Click **CANCEL** (no changes were made).

ATTENTION

Do not restart the CallPilot server, even if you are asked to do so.

Verifying domain name resolution

Desktop Messaging uses domain name resolution to translate a server name, such as `cpserver.mycompany.com`, into an IP address, such as `198.105.232.4`. It is common to have a Domain Name System (DNS) server perform name resolution. If your environment does not have a DNS server, your IS administrator may have used one of the following solutions:

- Resolve domain names using a HOSTS file.
- Use an IP address only to identify the CallPilot server.

Ask your IS administrator about the method your system uses for domain name resolution. For details about configuring environments without a DNS server, refer to the CallPilot Manager online Help.

Note: If you use an IP address to identify the CallPilot server, ensure that you configure all Desktop Messaging e-mail clients with the IP address instead of the CallPilot FQDN.

Defining the CallPilot server FQDN in CallPilot Manager

Once you have determined the CallPilot server FQDN and verified the method your messaging network uses to resolve it, you are ready to specify the FQDN in CallPilot Manager.

To define the CallPilot server FQDN

- 1 In CallPilot Manager, choose **Messaging> Message Network Configuration**.
- 2 In the Local Server Maintenance section, select the server name, and then click **Show Details**.

Result: The Server Properties screen appears.

- 3 In the SMTP/VPIM section, type the CallPilot server FQDN.

Example: cpserver.mycompany.com

- 4 Click **Save**.

Configuring messaging services

Introduction

This section describes how to configure the CallPilot server so that the Desktop Messaging and My CallPilot clients can communicate correctly with the CallPilot server.

Before you begin

As you configure the CallPilot server, complete the Pre-installation Checklist on page 26 to help you prepare for Desktop Messaging installation. Additional information is also available in the CallPilot Manager online Help.

Messaging protocols

The following messaging protocols must be configured correctly in CallPilot Manager for Desktop Messaging and My CallPilot:

- **IMAP server**—Internet Message Access Protocol (IMAP) enables Desktop Messaging and My CallPilot clients to log on to CallPilot and retrieve messages.
- **LDAP server**—Lightweight Directory Access Protocol (LDAP) enables Desktop Messaging and My CallPilot clients to access the CallPilot address book. You can use the CallPilot LDAP server or your existing LDAP server.
- **SMTP server**—Simple Mail Transfer Protocol (SMTP) enables Desktop Messaging and My CallPilot clients to send messages.

In the event of a security problem, you can disable the IMAP and SMTP services. For example, you can disable IMAP service to prevent users temporarily from logging on to CallPilot from Desktop Messaging. Alteration of server settings can also interrupt service for Desktop Messaging users.

Additional server configuration

CallPilot 4.0 also enables you to access a third-party LDAP address book for use with Desktop Messaging. You can only use a third-party LDAP server if you are using a Desktop Messaging groupware client (Outlook, GroupWise, or Lotus Notes).

You should verify that you can also specify security options for the My CallPilot web server.

For more information about these features, refer to the *Desktop Messaging and My CallPilot Administration Guide* (NTP 555-7101-503), and the CallPilot Manager online Help.

Security options

CallPilot supports the following encryption and authentication methods. The security method used for communication with servers depends on both the configuration of the server and the configuration of the Desktop Messaging client.

- **Secure socket layer (SSL) encryption**—SSL encrypts data communication between two endpoints on a network. It is normally used in environments that require additional security (for example, accessing a mailbox using a public Internet service provider).
- **Challenge-Response authentication**—An authentication method that uses the MD5 algorithm. The server sends a challenge string to the client, the client builds a response string based on the password. The response string is sent back to the server. The server builds a response string and compares this string to the client's. If both client and server used the same password, the response string matches and the user is authenticated.
- **Plain Password authentication**—An authentication method that uses the mailbox number and password, transmitted in clear text (unencrypted) over the network.

Ensure that you configure user e-mail clients to use the same security options that you select in CallPilot Manager. For additional information about security options related to Desktop Messaging, refer to the CallPilot Manager online Help. For details about security options supported by specific e-mail clients, refer to the e-mail client's online Help.

Note: Due to the complexity and diversity of network configurations, this guide cannot adequately cover issues of data network security. Discuss data network security issues with a security specialist or data network administrator. Refer also to “Securing the CallPilot server” in the *CallPilot Administrator's Guide* (NTP 555-7101-301).

To configure IMAP and LDAP settings

- 1 In CallPilot Manager, choose **Messaging> Internet Mail Clients**.
- 2 To allow clients to access LDAP with a high level of security, check the box **Enable LDAP with SSL port**. SSL for LDAP must also be enabled by the client if a high level of security is desired.
- 3 To set up the LDAP search base:
 - a. From CallPilot Manager Home, select **Configuration Wizard**.
 - b. Select **Next** from the Welcome page.
 - c. Select the **CallPilot Individual Feature Configuration (Express Mode)** radio button. Select **Next**.
 - d. Select the **Server Information** check box. Select **Next**.
 - e. Scroll to the LDAP search base and enter search base.
For example `dc=nortel,dc=ca`
(Note: there is no space after the comma)
 - f. Continue to click **Next** until Configuration Wizard reaches the last page.
 - g. Click **Finish**.
- 4 In the IMAP section, check the **Enable IMAP** box to turn on IMAP service. To allow clients to access IMAP with a high level of security, check the box **Enable IMAP with SSL port**.

- 5 Choose the required IMAP options.

For details about each option, refer to the online Help.

- 6 Click **Save** to save your changes.

Note: If you enable SSL, ensure that you instruct users to enable SSL in the Desktop Messaging clients.

To set SMTP options

- 1 In CallPilot Manager, choose **Messaging> Message Delivery Configuration**.
- 2 In the SMTP/VPIM section, check **Incoming SMTP/VPIM** to enable access to SMTP service from Desktop Messaging clients.
- 3 Click **Security Modes for SMTP sessions**, and then specify the required security options. To allow clients to access SMTP with a high level of security, check the box **Enable SSL for Incoming SMTP Sessions**. SSL for SMTP must also be enabled by the client if a high level of security is desired.
- 4 Click **Save** to return to the Message Delivery Configuration page.
- 5 Click **Save**.

Defining addressing prefixes

Introduction

Voice Profile for Internet Mail (VPIM) shortcuts are addressing prefixes that enable CallPilot to identify network switch locations, as well as VPIM-compliant sites that are not defined in your network database. There are two types of VPIM shortcuts: VPIM network shortcuts and open VPIM shortcuts.

VPIM network shortcut

This is a numeric addressing prefix that CallPilot uses to identify switch locations in a messaging network.

You must define a VPIM network shortcut for all local and remote prime locations and all satellite locations to use Desktop Messaging and My CallPilot.

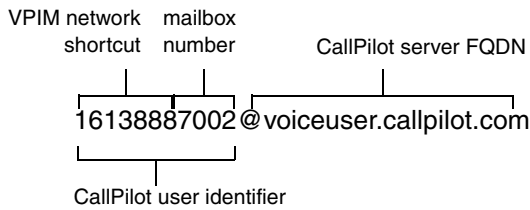
Open VPIM shortcut

This is a numeric prefix that CallPilot uses to identify VPIM-compliant sites that are not defined in your network database. These VPIM-compliant sites are referred to as “open sites.” If users need to send CallPilot messages to open sites, you can configure open VPIM shortcuts for those sites.

For more information about VPIM shortcuts, search for “VPIM addresses” in the CallPilot Manager online Help.

Setting the VPIM network shortcut

Desktop messaging uses the VPIM network shortcut to create a unique CallPilot address for each mailbox on the CallPilot system.



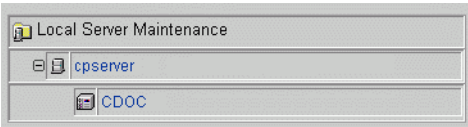
In a Network Message Service (NMS) system, the VPIM network shortcut allows two different NMS sites to have the same mailbox number.

	User A (Toronto)	User B (Richardson)
Mailbox	5833	5833
VPIM network shortcut	1314442	1416338

In systems that do not use NMS, the VPIM network shortcut is still required for the prime location on the CallPilot server. It identifies a site for VPIM Networking and enables users to receive messages from other VPIM-compliant voice messaging systems.

To add a VPIM network shortcut

- 1 In CallPilot Manager, choose **Messaging> Message Network Configuration**.
- 2 In the Local Server Maintenance section, expand the network tree to display the locations associated with the local server.



- 3 In the list of locations, select the prime location, and then click **Show Details**.

- 4 In the VPIM section, click **Add**.
- 5 In the Prefix box, type the VPIM network shortcut for the prime location, and then click **Save** to return to the Location Properties page.
- 6 Click **Save**.
- 7 If you are using NMS, configure an VPIM network shortcut for each local and remote prime switch location, as well as all satellite switch locations.

Note: If your messaging network is configured with Electronic Switched Network (ESN), Coordinated Dialing Plan (CDP), or a hybrid dialing plan that includes both ESN and CDP, ensure that the options for these plans are correctly configured on the Location Properties page for each switch location. For more information, search for “dialing plan” in the CallPilot Manager online Help.

Section C: CallPilot Desktop Messaging customization

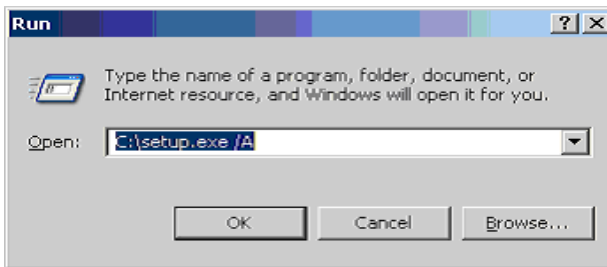
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Benefits of customized installation

The system administrator can use setup.exe to generate customized installations. A customized installation consists of a Windows Installer (setup.msi) file and is similar to the default setup.exe file.

The customized installation is generated by running setup.exe with the /A option. You can run **setup.exe /A** from the command prompt, **Start> Run...** start menu option.

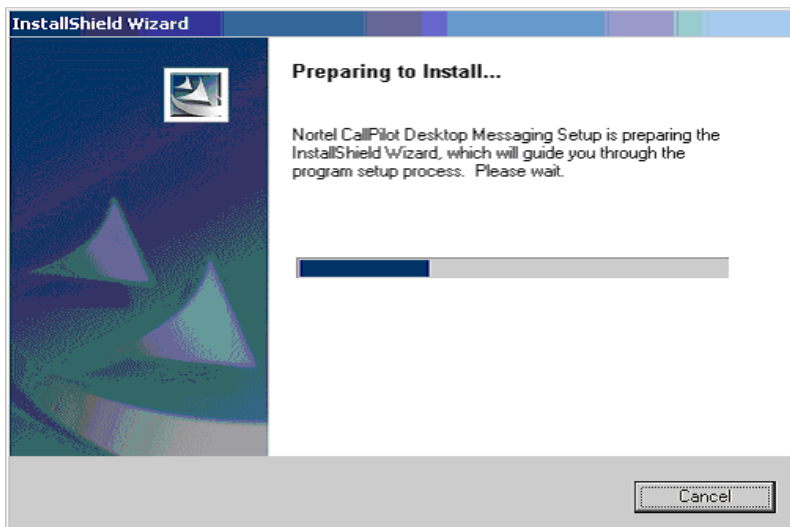


When the /A option is specified, setup.exe displays a series of wizard screens to pre-configure the options and features installed by CallPilot Desktop Messaging. The wizard screens are shown or hidden, dependant on the selections made by the administrator. The screens displayed show the wizard screens pertaining to a CallPilot 4.x server.

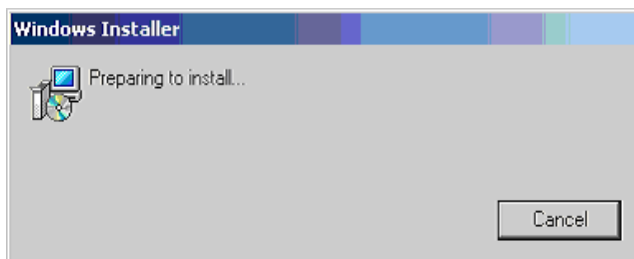
Customizing installation

To customize the installation

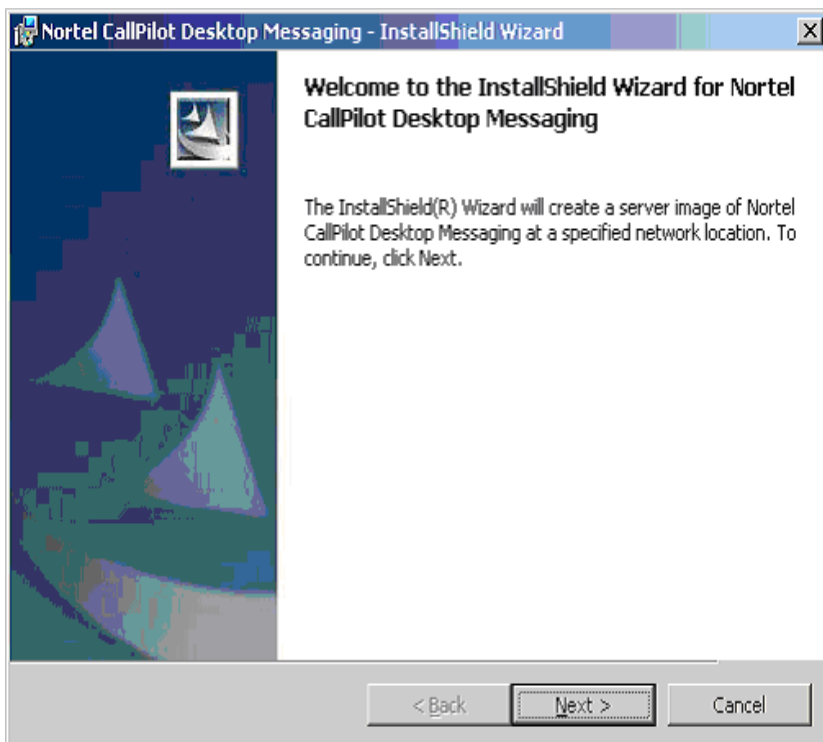
- 1 Click **OK** on the RUN dialog box. Preparing to install screen appears.

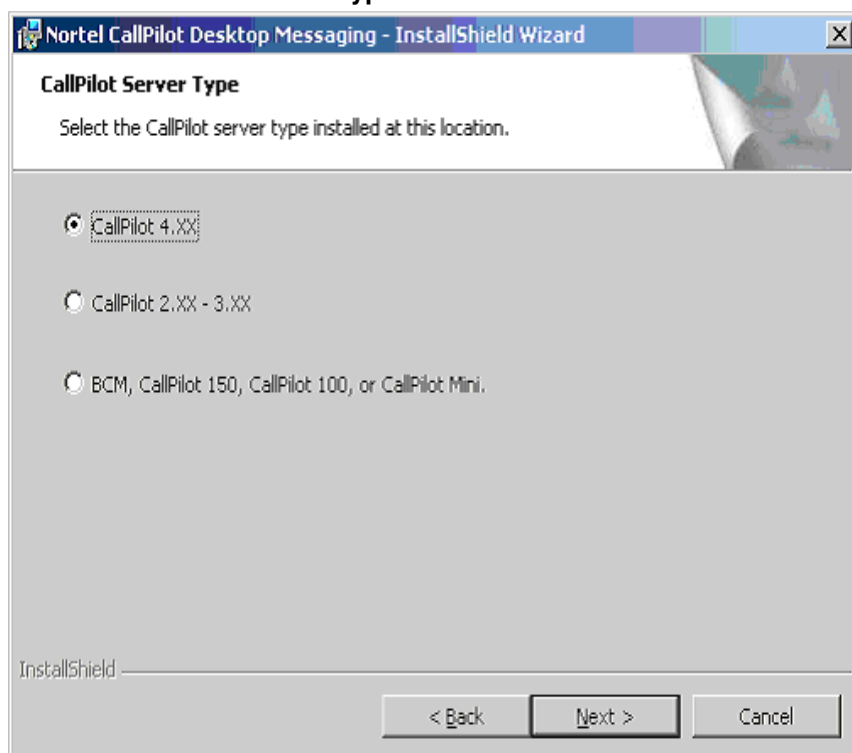


- 2 This Preparing to install dialog box appears after InstallShield has completed installation preparation.



- 3 Welcome dialog box appears, click **Next** to proceed with installation.



4 Select CallPilot Server Type 4.X click Next.

- 5 Enter the appropriate information in **Server name or TCP/IP address**; **VPIM network shortcut**; and **Language** (selected from drop down menu, activated by clicking on the down arrow), click **Next**.

Nortel CallPilot Desktop Messaging - InstallShield Wizard

CallPilot Server Information

Enter information to identify the CallPilot server.

Server name or TCP/IP address:
na42349.us.nortel.com

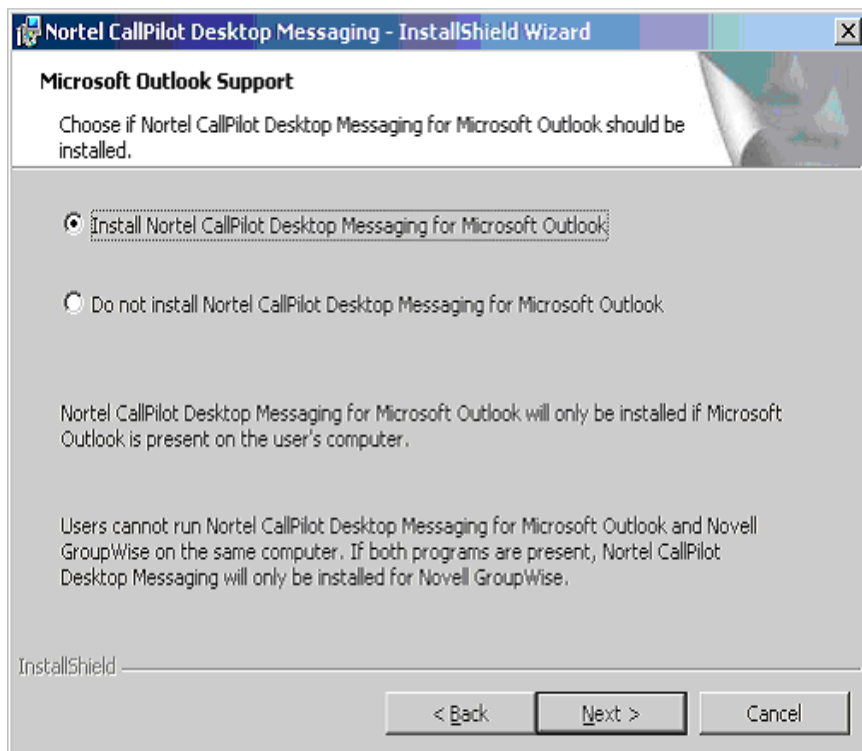
VPIM network shortcut:
1952897

Language:
English

InstallShield

< Back Next > Cancel

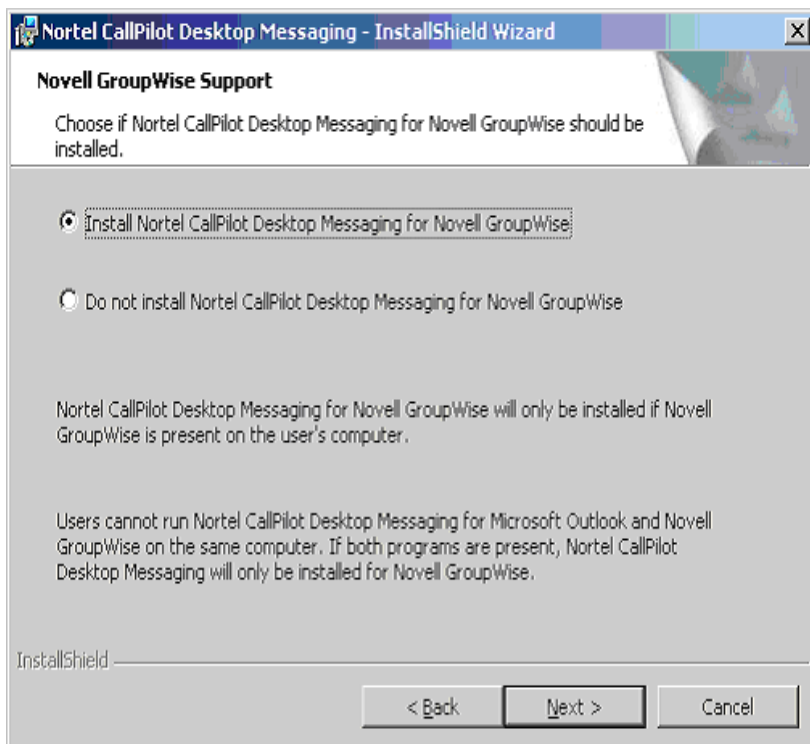
6 Select Install Nortel CallPilot Desktop Messaging for Microsoft Outlook radio button, click Next.



7 Select Add Nortel CallPilot Desktop Messaging to default mail profile radio button, click Next.



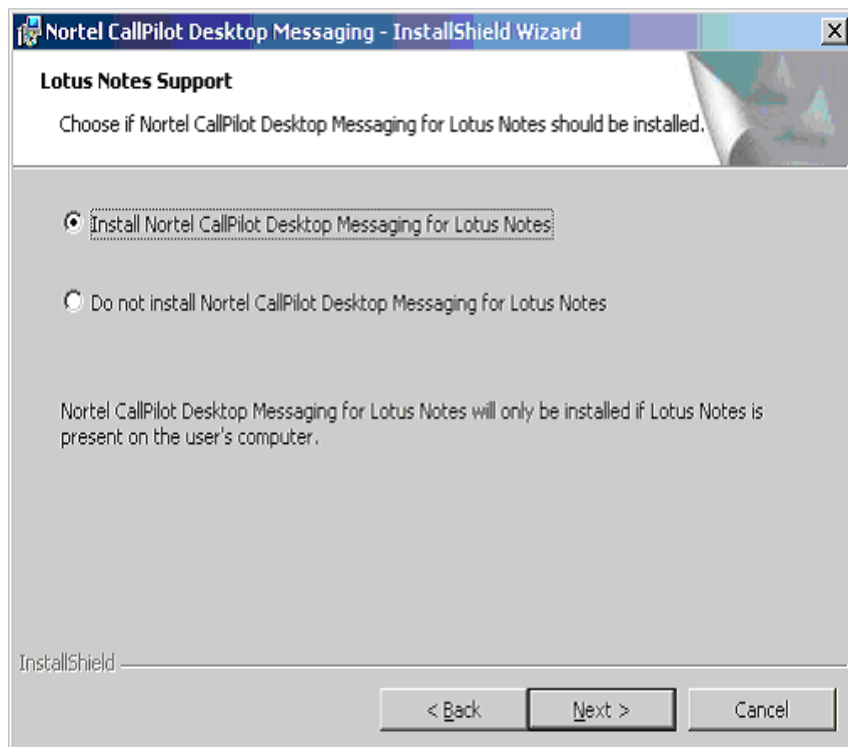
8 Select **Install Nortel CallPilot Desktop Messaging for Novell GroupWise radio button, click **Next**.**



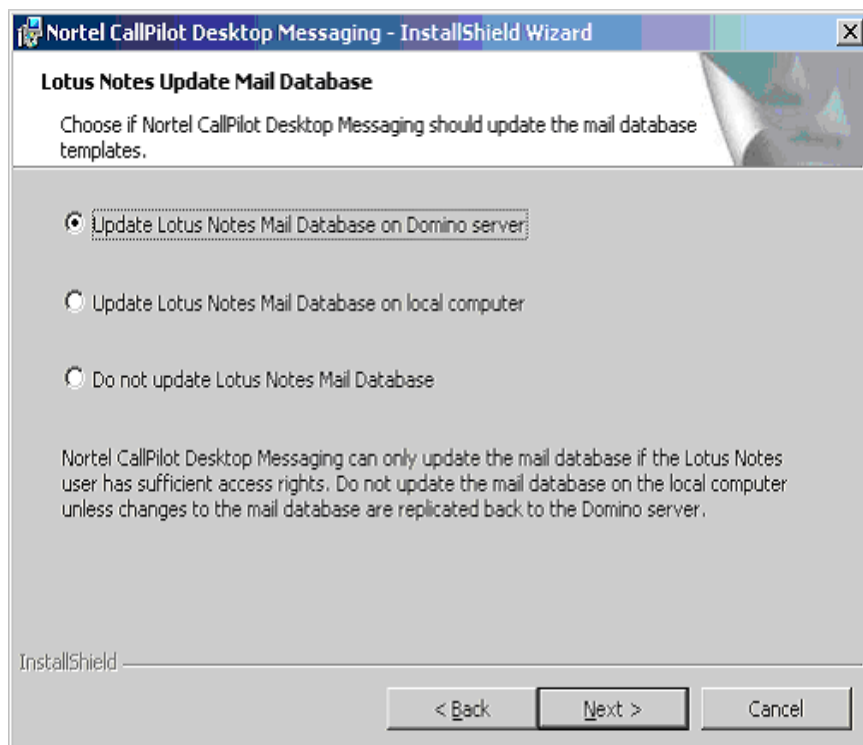
- 9 Select **Add Nortel CallPilot Desktop Messaging to the default profile** radio button, click **Next**.



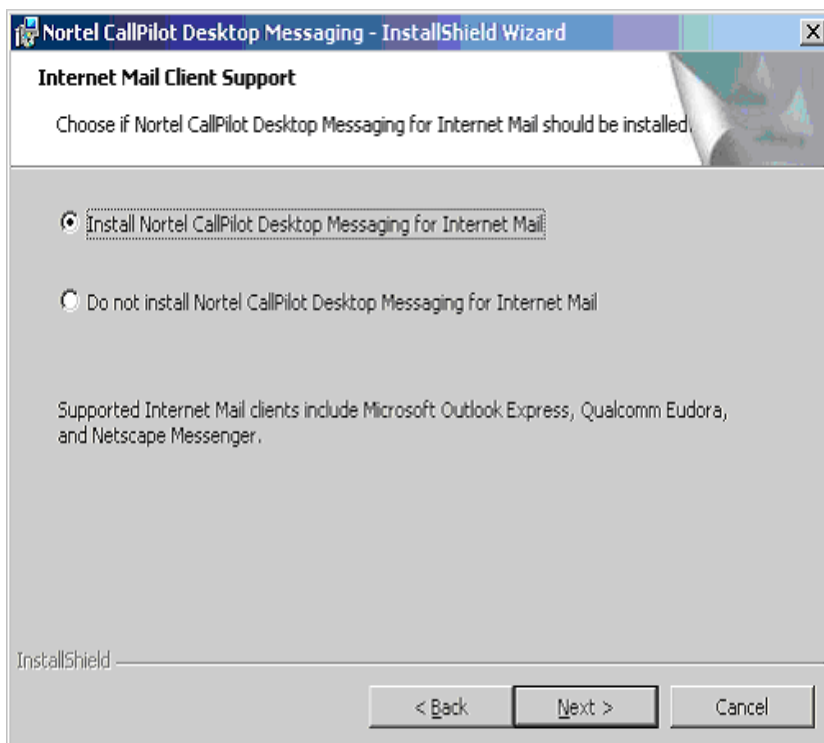
10 Select **Install Nortel CallPilot Desktop Messaging for Lotus Notes radio button, click **Next**.**



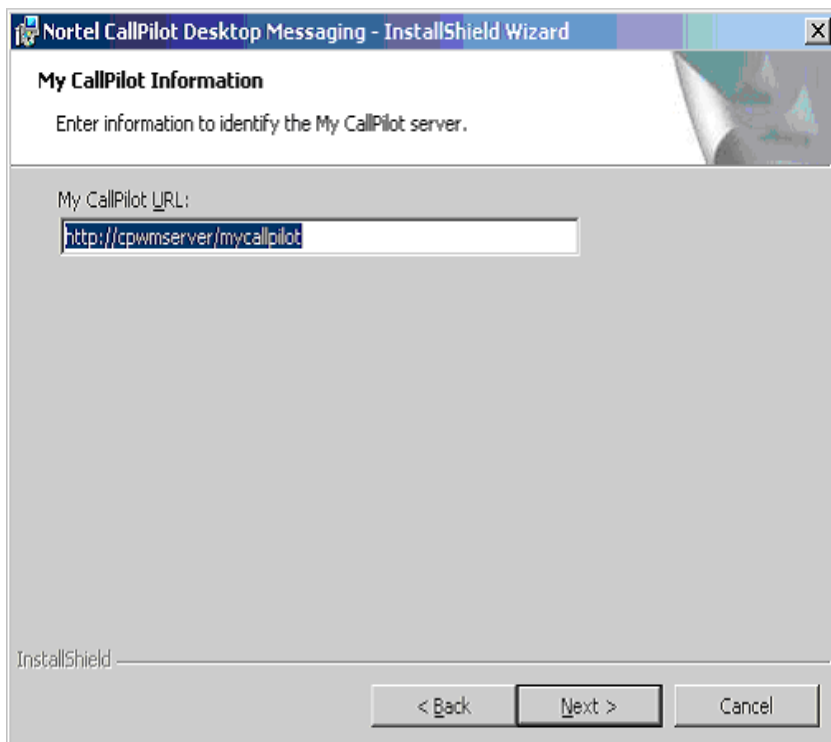
- 11** Select **Update Lotus Notes Mail Database or Domino server** radio button, click **Next**.



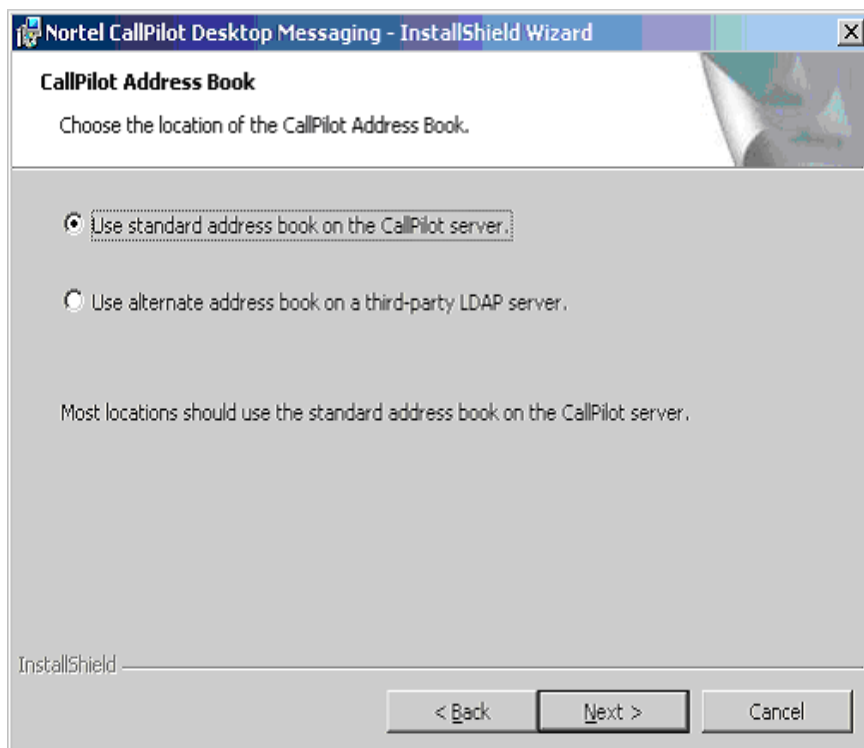
12 Select **Install Nortel CallPilot Desktop Messaging for Internet Mail radio button, click **Next**.**

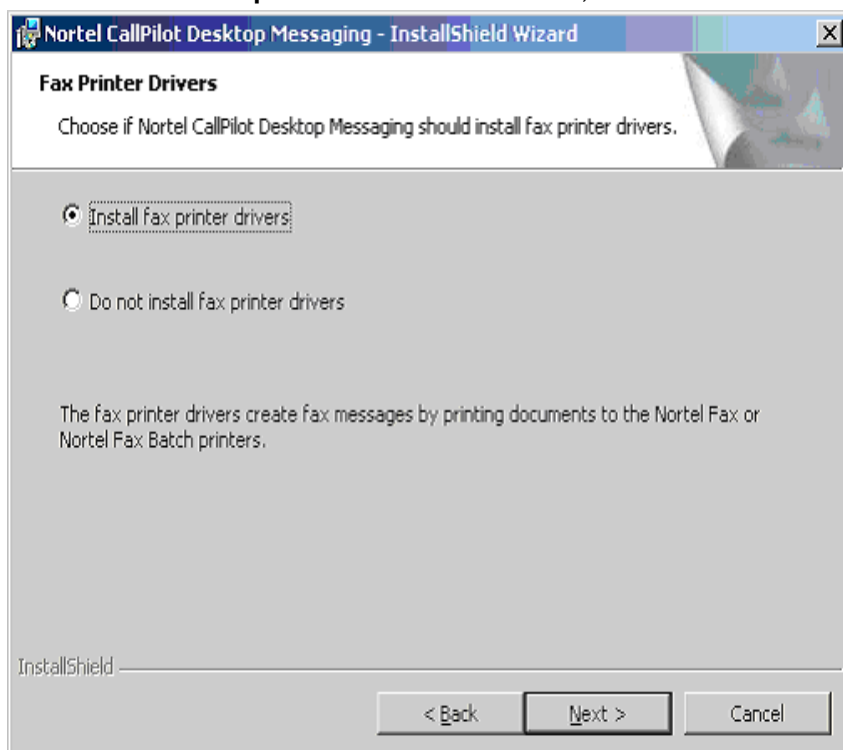


- 13 Enter the information to identify the My Callpilot server, in **My CallPilot URL** text box, click **Next**.



- 14 Select **Use standard address book on the CallPilot server** radio button, click **Next**.



15 Select Install fax printer drivers radio button, click **Next.**

- 16 Type the name of the account and password in the **Administrator account** and **Administrator password** fields, click **Next**.

Nortel CallPilot Desktop Messaging - InstallShield Wizard

Administrator Account

Enter the administrator's account and password.

Administrator account:

Administrator password:

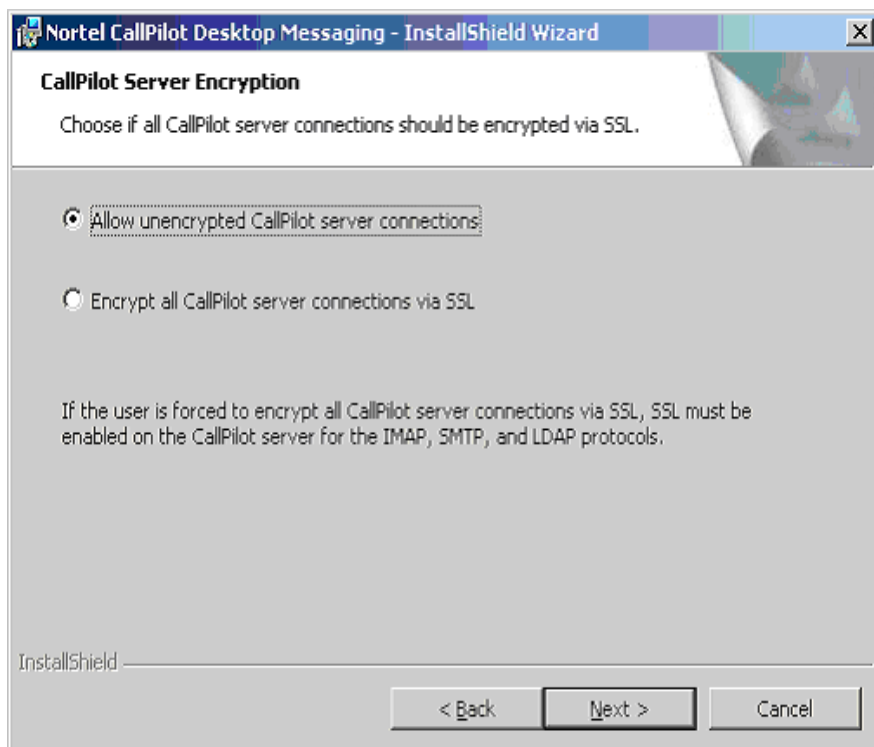
To install the fax drivers from non-administrator accounts, Nortel CallPilot Desktop Messaging requires the administrator's account and password. You may enter the administrator account for the network domain or local computer. If you choose the network domain, enter the account in the form of <domain>\<administrator account>.

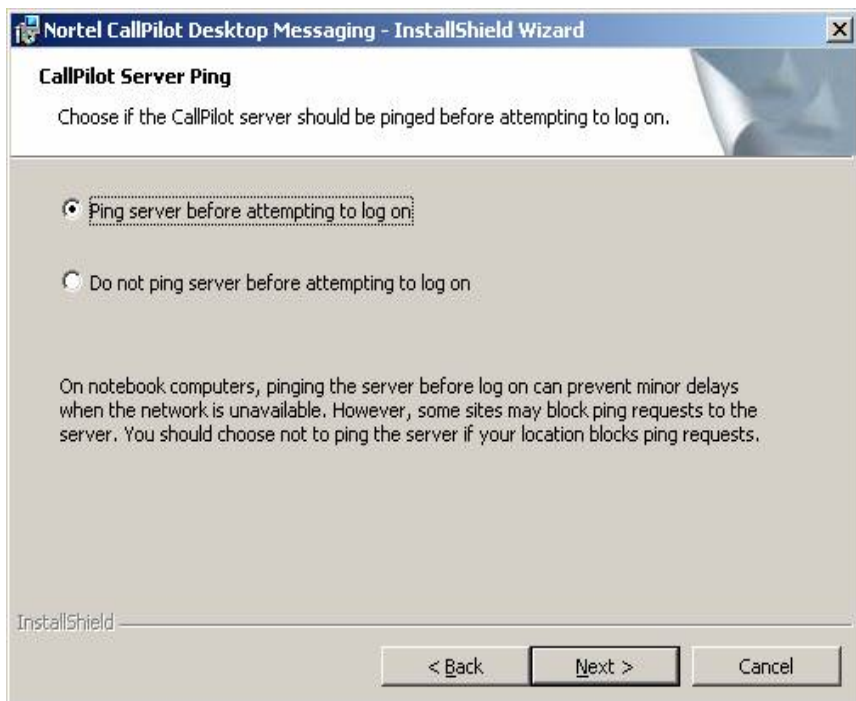
The administrator's account and password will be encrypted and stored in the installation database and the user's computer. If you do not enter the administrator's account and password, fax drivers may not be installed on the user's computer.

InstallShield

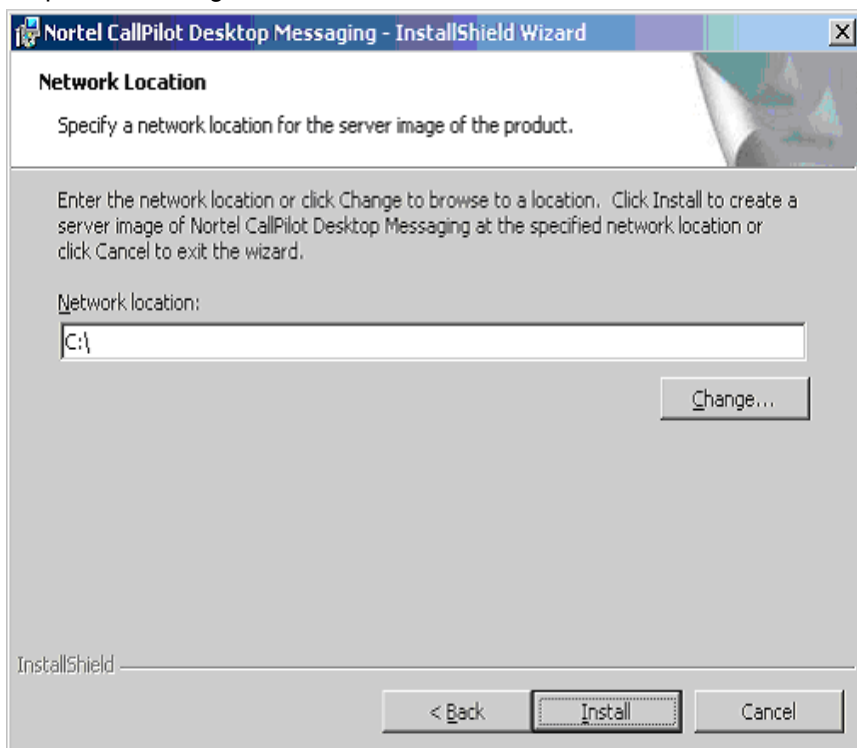
< Back Next > Cancel

- 17 Select **Allow unencrypted CallPilot server connections** radio button, click **Next**.

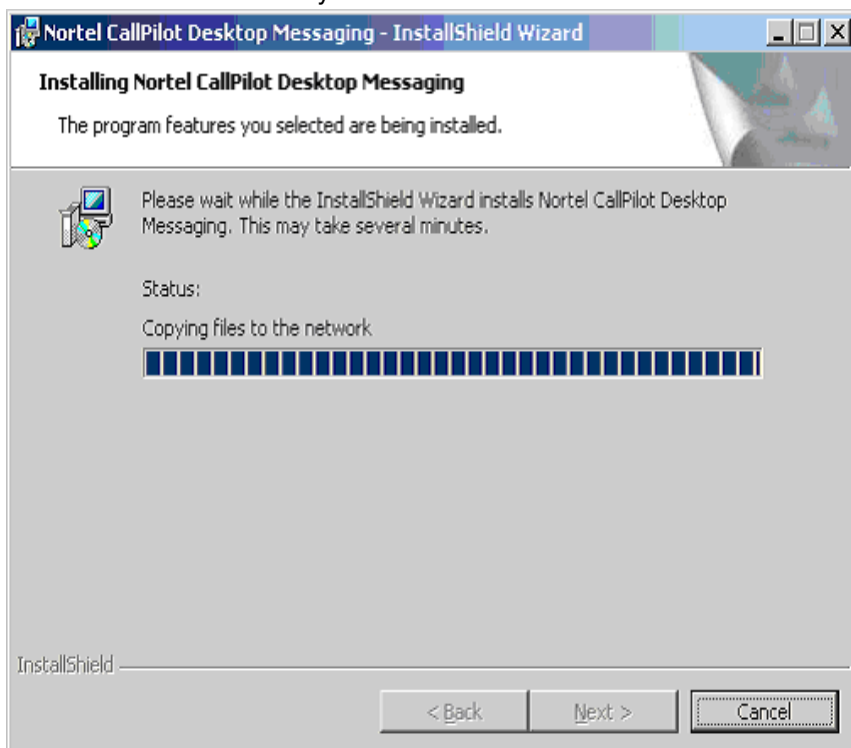


18 Select **Ping server before attempting to log on radio button, click **Next****

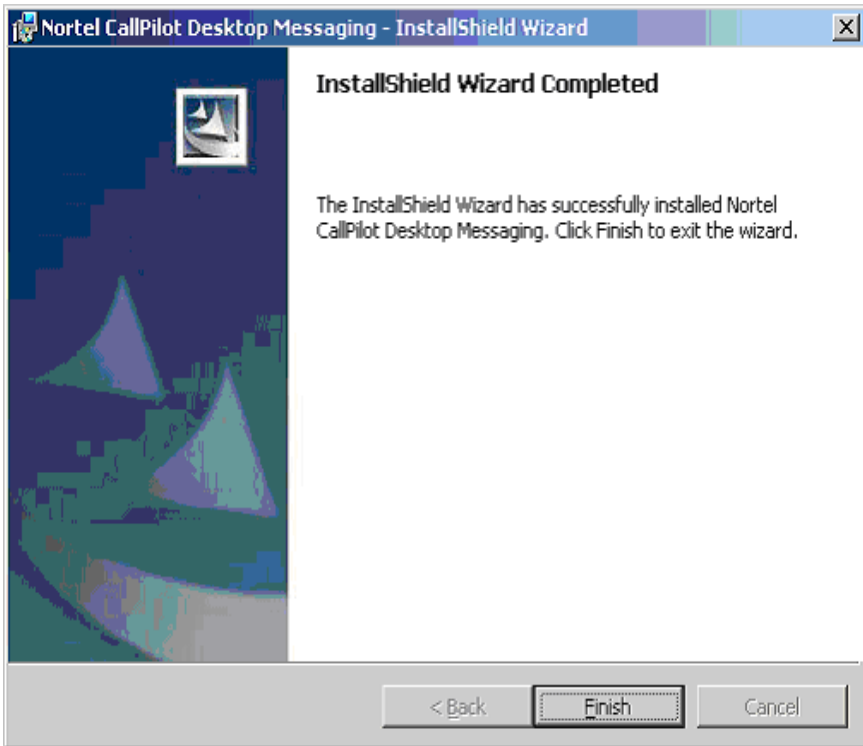
- 19 Enter the network location information in the **Network location** dialog box, or click the **Change...** button. Click **Install**, or **Back** to go to the previous dialog boxes.



20 Select **Cancel** button if you wish to cancel the Installation.



21 When the installation is complete click **Finish**.



Setup.ini Files

In addition to creating a customized, network installation, running **setup.exe /A** creates a **setup.ini** file.





The **setup.ini** file is beneficial when a new release of CallPilot Desktop Messaging is issued. The **setup.ini** file can be copied from the original customize release to the new release. This file automatically customizes the new release without the necessity to rerun **setup.exe /A**.

- You can still run **setup.exe /A** to create a customized installation of the new release. Copy and run the **setup.ini** is a shortcut to avoid reentering the customized data in the **setup.exe /A** wizard screens.
- **Setup.ini** must be copied to the same directory as **setup.exe /A** used to customize the installation. If **setup.ini** when run, does not customize the installation, even though it is copied to the proper location, run **setup.exe /A** to create a customized installation.

Changing the Default INI File Name

The default file name used to customize installations is **setup.ini**. This file name may be changed through command line parameters. Changing the default file name is beneficial when multiple CallPilot servers are installed on the same LAN. A single, shared installation may then be used with unique INI files for each server.

To change the name of the **setup.ini** file when customizing installations, run **Setup.exe /A /VINI="<file_name>"** where **<file_name>** is the name of the new INI file. To use a specific INI file when installing CallPilot Desktop Messaging, run **Setup.exe /VINI="<file_name>"** or **Setup.msi INI="<file_name>"**.

Example

To create a customized setup for CallPilot servers CPServer1 and CPServer2, run **Setup.exe /A /VINI="CPServer1.ini"** and enter information specific for CallPilot server CPServer1, then run **Setup.exe /A /VINI="CPServer2.ini"** and enter information specific for CallPilot server CPServer2. Use the same network location for both customized installations. This will create two INI files, **CPServer1.ini** and **CPServer2.ini**, in the network location of the customized installation.

To install CallPilot Desktop Messaging the first time, users with mailboxes on CPServer1 should run **Setup.msi INI="CPServer1.ini"** while users with mailboxes on CPServer2 should run **Setup.msi INI="CPServer2.ini"**. If the you simply run **setup.msi**, your installation will not be customized.

When a new release of CallPilot Desktop Messaging is available, copy **CPServer1.ini** and **CPServer2.ini** to the root folder of the new release. You may then run **Setup.exe/VINI="CPServer1.ini"** or **Setup.exe/VINI="CPServer2.ini"** to update CallPilot Desktop Messaging on your computer.

- You can still run **Setup.exe /A /VINI="CPServer1.ini"** and **Setup.exe /A /VINI="CPServer2.ini"** to create a customized installation of the new release. Copying the **CPServer1.ini** and **CPServer2.ini** files is

simply a shortcut to avoid reentering the customized data in the **Setup.exe /A** wizard screens.

Note: If you install a new e-mail client after installing CallPilot 4.0, you must install CallPilot software for the new e-mail client to access your CallPilot messages. Refer to the troubleshooting section of *Desktop Messaging and My CallPilot Administrators Guide* (555-7101-503) for more information.

Section D: CallPilot Desktop Messaging installation

In this section

Desktop Messaging requirements	68
Installing Desktop Messaging on end-user workstations	72
Installing Desktop Messaging in a Citrix Thin Client environment	86
My CallPilot requirements	91
Installing My CallPilot for Windows	95
Installing the Macintosh My CallPilot Web Client	98
Maintenance mode	105
Customizing Lotus Notes Templates	107

Desktop Messaging requirements

Servers

You must install CallPilot with a keycode that enables Desktop Messaging features. CallPilot Desktop Messaging 4.0 works with CallPilot 2.0, 2.5, 3.0 and CallPilot 4.0 Servers.

The CallPilot server must be configured with Microsoft Internet Information Server (IIS) 5 on Windows 2000 server with Service Pack 1, or, Microsoft IIS 6 on Windows 2003, standard version.

Desktop messaging client installation



CAUTION

Risk of reduced system performance and security vulnerability

Do not install Desktop Messaging clients on the CallPilot server. Nortel does not support the use of Desktop Messaging clients on the CallPilot server because they:

- consume disk space that CallPilot may need
- may cause the introduction of e-mail-distributed viruses to the server

Server configuration

Before you install Desktop Messaging, ensure that you have configured the CallPilot server properly. For details, see Section B: “Configuring the CallPilot server,” on page 29.

User workstation requirements



CAUTION

USE OF PASSWORDS

- Installation requires the user to have the necessary rights to install software on their computer. Installation fails if the user lacks rights to install software, or modify the registry.
- Installation of the fax and fax batch printers requires an administrator's account and password for the user's computer or computer domain. The installer prompts the user to enter an administrator's account or password if necessary.

Users require the following minimum software and hardware for Desktop Messaging:

Windows systems:

- Windows 2000 Professional, or Windows XP Professional
- Monitor with 256-color 800 x 600 capability
- 15 Mbytes of free disk space to install software
- Sound card and speakers for playing messages on the computer
- Microphone connected to your computer for recording voice messages
- For Desktop Messaging: a LAN (Ethernet) connection to the CallPilot server

Users can access CallPilot messages on their network using ISDN, ADSL, or dial-up modem.

Macintosh systems (for Macintosh My CallPilot web client only):

- PowerPC 603, 604, G3 or compatible processor
- Apple Macintosh OS 9.0, 9.1

Note: Partial support for Mac OS X is available with My CallPilot.

- TCP/IP network connection of at least 28.8 kbits/s
 - Speakers for playing messages on the computer
 - Microphone for recording messages from the computer
- Note:** Many PC microphones do not work on PowerPC computers. A PlainTalk microphone should be used.

E-mail client requirements

Desktop Messaging supports groupware e-mail clients that run with a corporate e-mail server and IMAP Internet e-mail clients. Refer to the CallPilot 4.0 General Release Bulletin for the most up to date list of supported clients.

Groupware clients (including Citrix)	Internet clients (including Citrix)
---	--

- | | |
|--|--|
| <ul style="list-style-type: none">■ Microsoft Outlook 2000, 2002 (XP), and 2003■ Novell GroupWise 6.5■ Lotus Notes 6.0 and 6.5 | <ul style="list-style-type: none">■ Microsoft Outlook Express 6.0, Outlook 2000; 2002 (XP); 2003 in Internet mail mode■ Netscape Mail 6.2x, 7.0, 7.1, and 7.2■ Qualcomm Eudora E-mail 6.0 and 6.1■ Citrix MetaFrame XP■ Citrix MetaFrame Presentation Server 3.0 |
|--|--|
-

Nortel recommends that you install the latest service release (SR) update for your e-mail client.

Notes:

- **Outlook 2002 (Office XP client)**—For information about the latest Office XP service pack, go to the Microsoft web site and search for article Q307841 in the Microsoft Knowledge Base. Also refer to article Q319820 for additional Outlook 2002 fixes.

- **GroupWise**—To use Desktop Messaging for GroupWise, Windows Messaging 4.0 must be installed.
During GroupWise installation, the installation program checks for Windows Messaging. If it is not detected, the system asks if you want to install Windows Messaging. You should install the complete Windows Messaging system, even if Windows Messaging is already installed on the computer.
- **Lotus Notes**—To install Desktop Messaging for Lotus Notes, you must have Manager or Designer control of the user's mail database. This control is set on the server by the Lotus Notes administrator.
- **fax messaging**—Microsoft Windows Imaging is no longer required in CallPilot 4.0. CallPilot desktop software installs fax viewing software for the Microsoft Outlook, Novell GroupWise and Lotus Notes desktop clients. Software used to send faxes is also installed.

My CallPilot and the IMAP client rely on whichever application is associated with *.tif files to view faxes.

Installing Desktop Messaging on end-user workstations

Preparing for Desktop Messaging installation

Before you install Desktop Messaging, ensure that:

- you have all the information you need in the Pre-installation Checklist
- user workstations have the required software for Desktop Messaging

For more information, see “Desktop Messaging requirements” on page 68.

Upgrading Desktop Messaging

If you are upgrading from a previous version of Desktop Messaging, verify the currently installed version:

- **Desktop Messaging 1.07 or earlier**—You must uninstall the currently installed version before installing a newer version of Desktop Messaging.
- **Desktop Messaging 2.0 or later**—You can reinstall the same version of Desktop Messaging without removing the currently installed software.

To uninstall Desktop Messaging

- 1 In the Windows Control Panel, double-click **Add or Remove Programs**.
- 2 In the program list, select the Desktop Messaging client to remove.
- 3 Click **Change/Remove**.

Result: An Add/Remove Programs dialog box appears, asking you if you are sure you want to remove Nortel CallPilot Desktop Messaging from your computer.

- 4 Click **Yes** to begin the uninstallation process.

Result: The uninstallation program starts.

Running Desktop Messaging installation

The Installation process is a streamlined user interface employing the Microsoft Windows Installer system. This system supports the latest releases of Microsoft Windows and permits customizable installations.

This feature permits the System Administrator to automate the installations and upgrades, requiring less user or administrative intervention.

You have two installation options for Desktop Messaging:

- **Complete installation**—Installer automatically installs CallPilot Messaging for all e-mail clients found on the user's computer.

Note: If Microsoft Outlook and Novell GroupWise are installed on the same computer, the Novell GroupWise client *is* installed and Microsoft Outlook client *is not*. CallPilot Desktop Messaging does not support Microsoft Outlook and Novell GroupWise on the same computer.

- **Custom installation**— User is prompted to choose which features to install. The features are presented to the user through the Windows Installer feature tree.

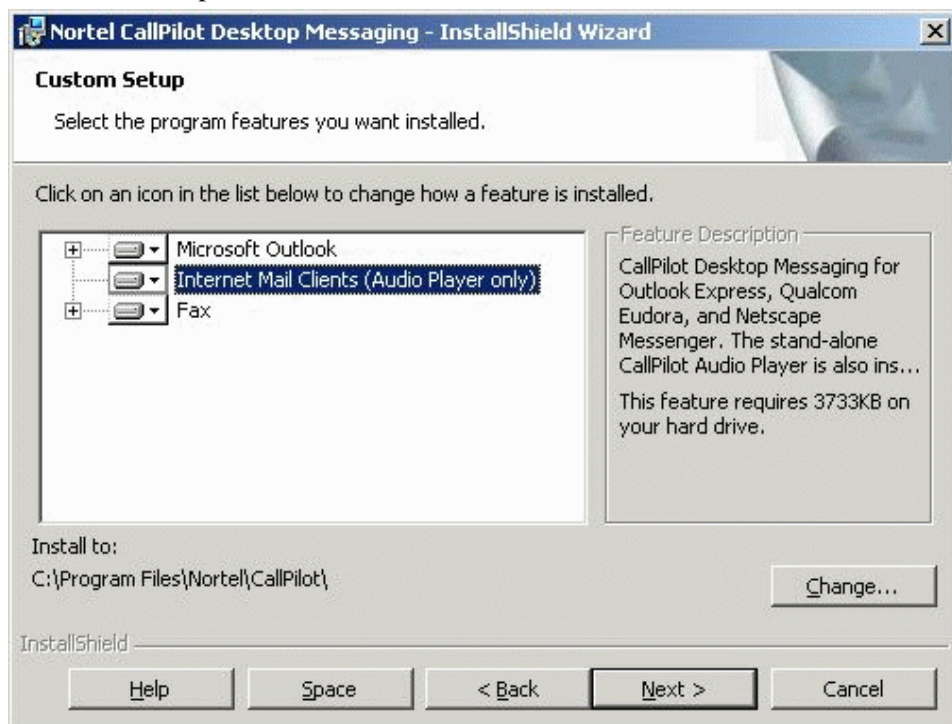


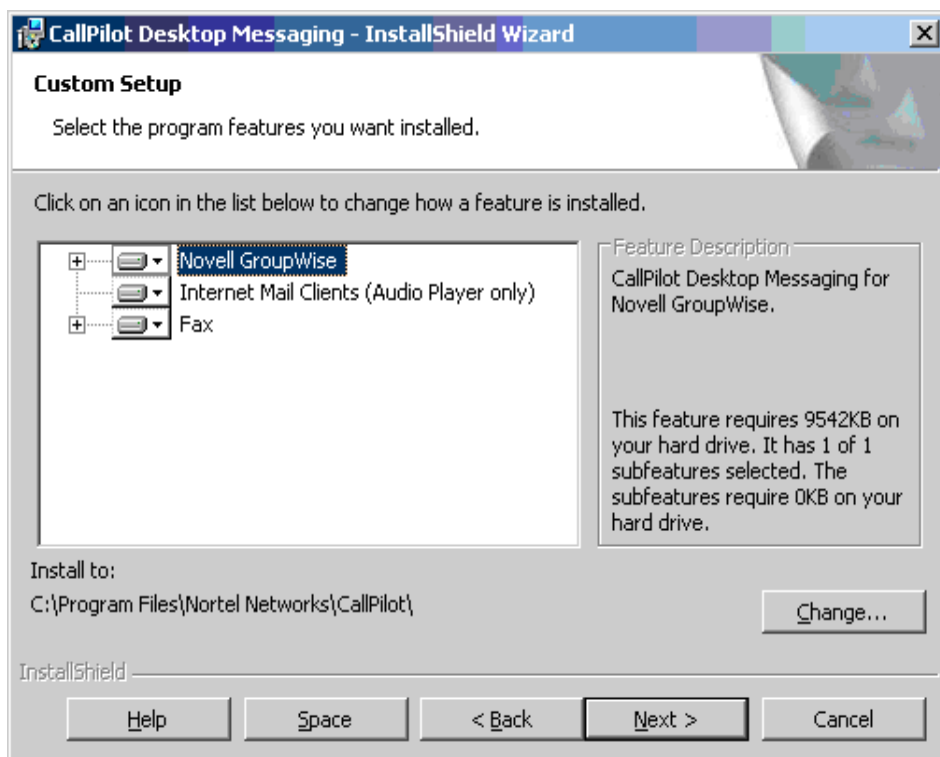
ATTENTION

If the installation is from the web, there are two options:

- the administrator can compress all the installation files and point the web link to this file. Users can download the compressed file to their computer, extract the contents, and double click on **setup.exe** to commence installation.
- or the administrator can load the appropriate software in a shared network, and the user can install by double clicking on **setup.exe**.

Note: Feature tree does not display a feature that cannot be installed on the user's computer.





User starts the installation by double-clicking on **setup.exe**. A series of wizard screens are presented to install and configure CallPilot Desktop Messaging.

Install Desktop Messaging Clients

The system administrator is responsible for creating customized CallPilot Desktop Messaging installations. Refer to Section C - CallPilot Desktop Messaging Customization for information on customizing CallPilot Desktop Messaging installation.

Desktop Messaging Installation



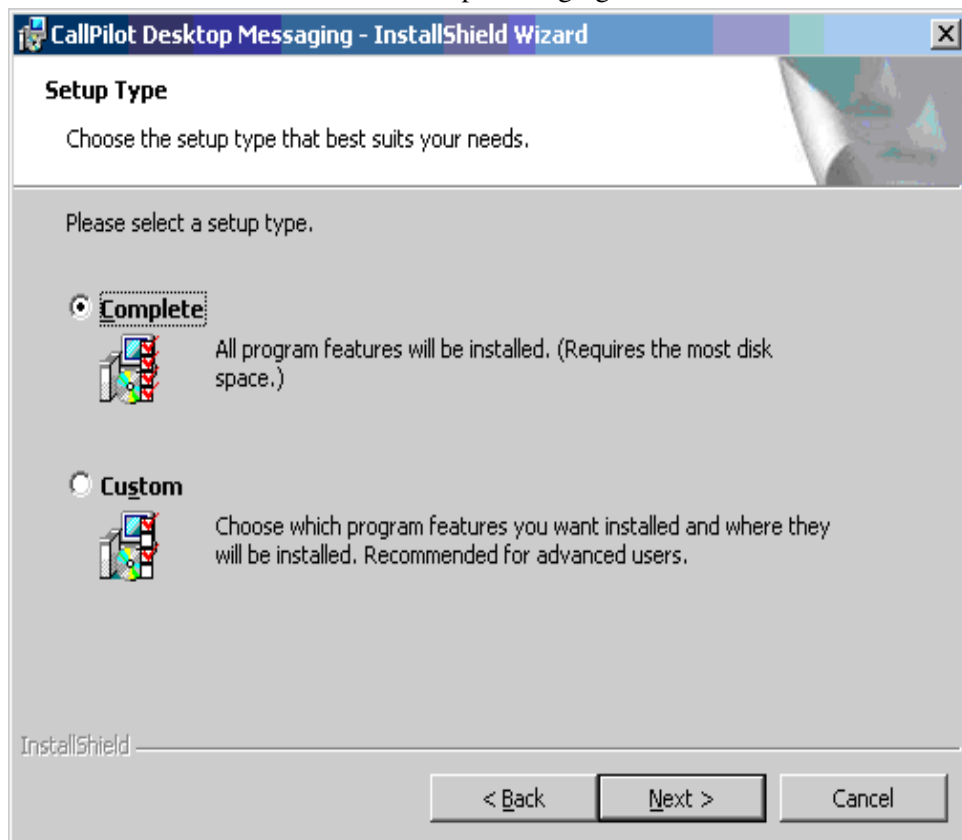
setup.exe



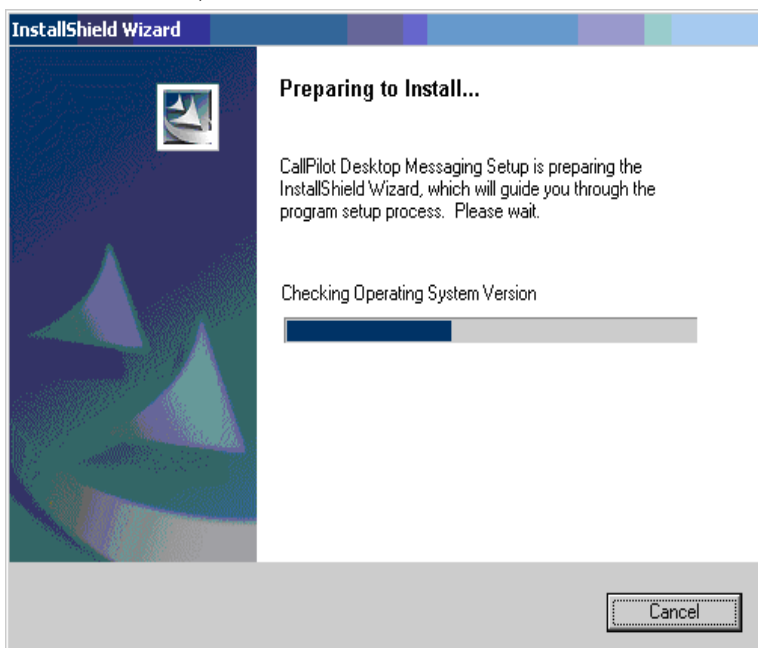
There are two choices for Desktop Messaging Installation: **Complete** and **Custom**.

Complete Installation

- Clicking **Next** on the CallPilot Server Information dialog box brings up the Setup Type dialog box. Select **Complete** radio button and click **Next** to start installation of Desktop Messaging software.

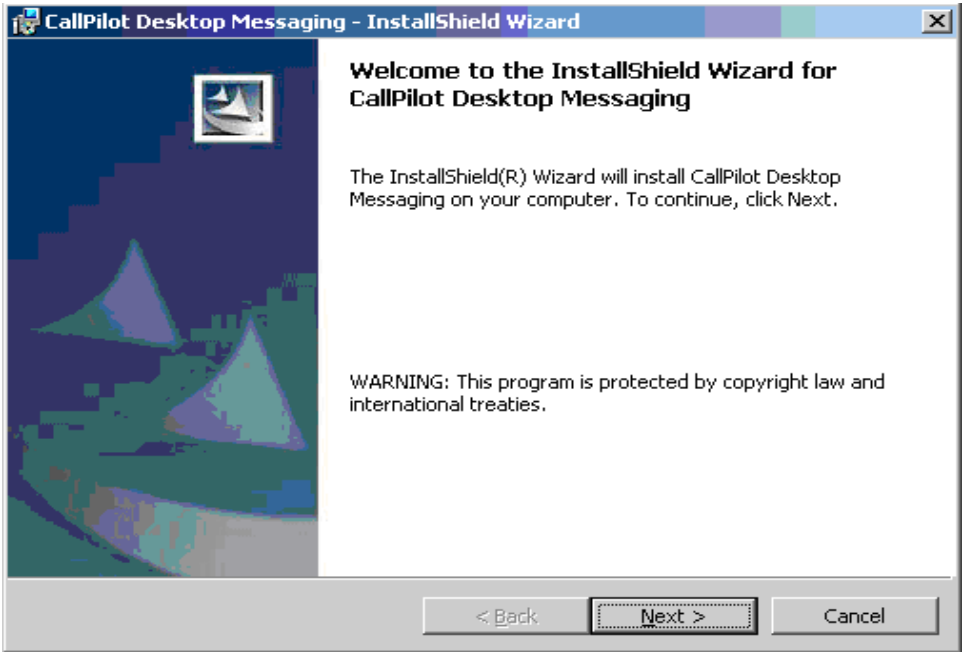


- The MSI feature prepares the computer for installation, if you click the **Cancel** button, the installation will terminate.



Welcome

The Welcome screen provides legal information and informs the user that InstallShield Wizard installs CallPilot Desktop Messaging. Click **Next**.



CallPilot Server Information

The CallPilot Server Information screen is used to set the **Server Name or TCP/IP address**; **VPIM network prefix**; and **Language**, click **Next**.

CallPilot Desktop Messaging - InstallShield Wizard

CallPilot Server Information

Enter information to identify the CallPilot server.

Server name or TCP/IP address:

na42349.us.nortel.com

VPIM network prefix:

1952897

Language:

English

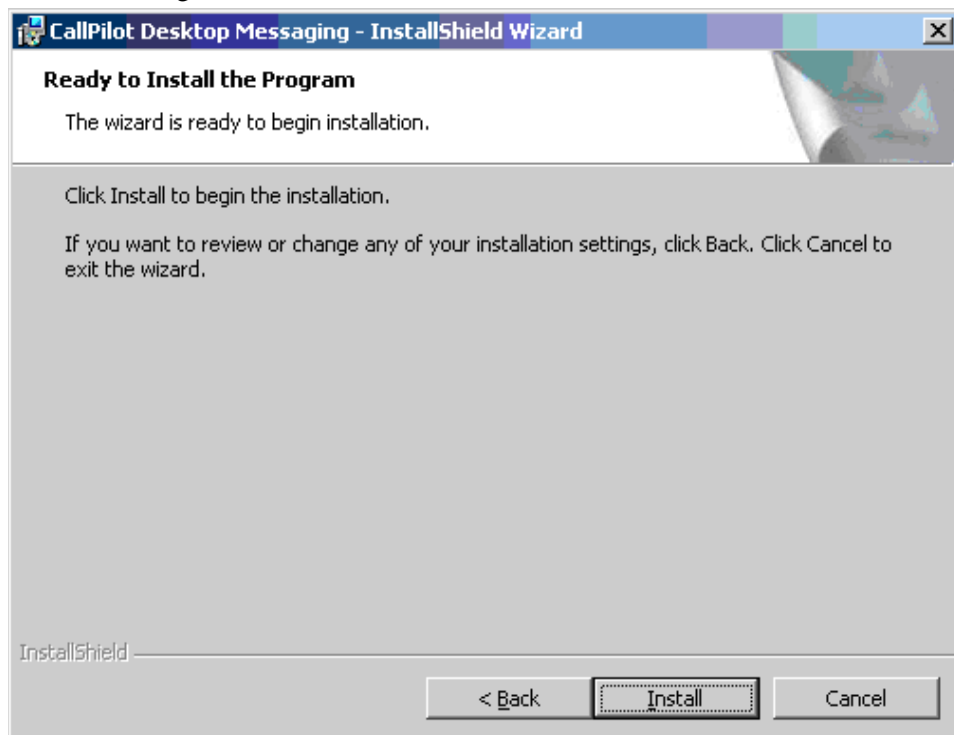
InstallShield

< Back

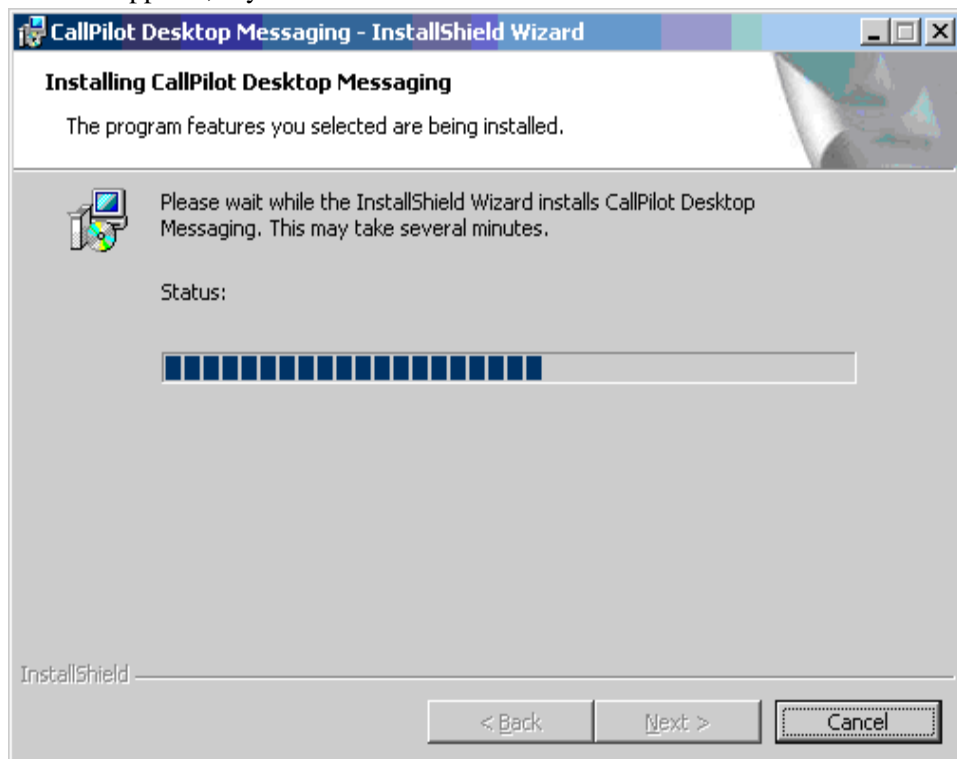
Next >

Cancel

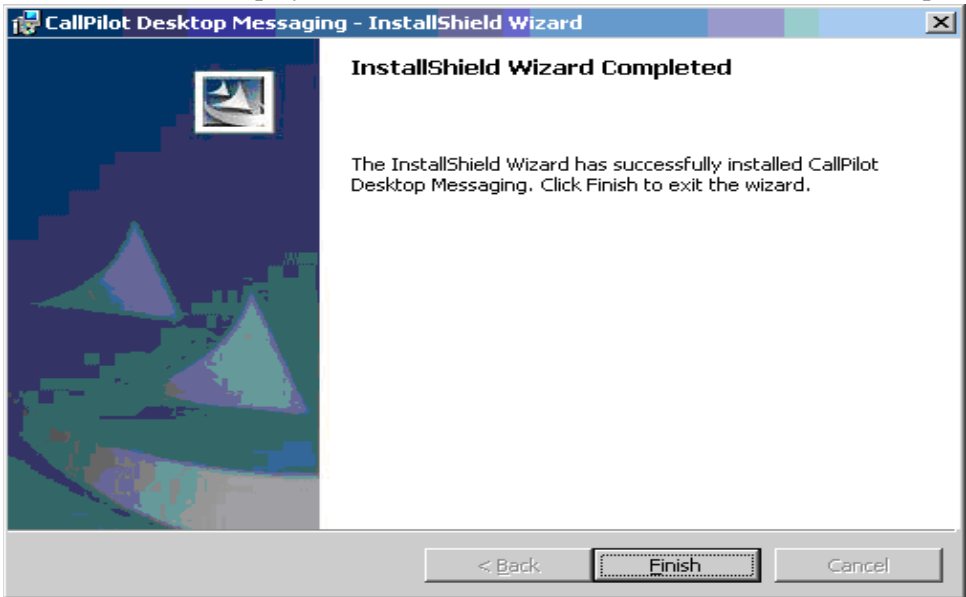
- When the CallPilot Ready to Install screen opens, click **Back** to make a change or **Install** to commence installation of the software.



- Once the Install button is selected, the Installation progress screen appears, if you click **Cancel** the installation terminates.



- At the completion of the installation, the InstallShield Wizard Completed screen is displayed. Click on the **Finish** button to return to the desktop.



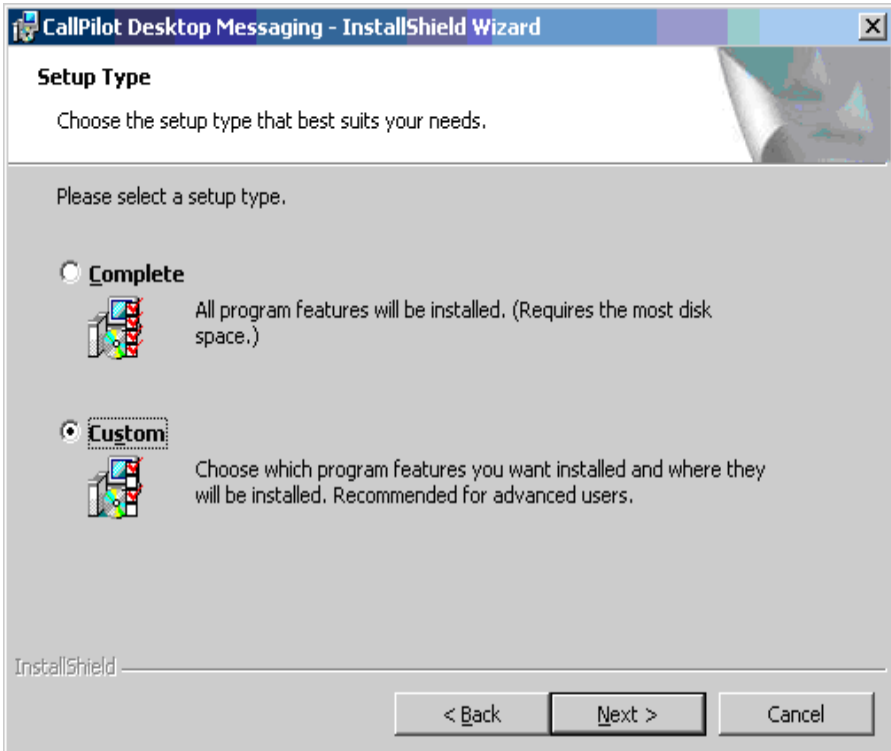
Custom Installation

User may choose to perform a Custom installation. This selection permits the user to choose which features to install; only features valid for the user's computer are displayed. Features available are:

- Microsoft Outlook - CallPilot Desktop Client for Microsoft Outlook
 - Add to Default Mail Profile - Add to Microsoft Outlook mail profile
- Novell GroupWise - CallPilot Desktop Client for Novell GroupWise
 - Add to Default Mail Profile - Add to Novell GroupWise mail profile
- Lotus Notes - CallPilot Desktop Clients for Lotus Notes
 - Update Mail Database - Update user's mail database
- Internet Mail Clients/Audio Player - CallPilot Desktop Client for Netscape Messenger, Qualcomm Eudora, and Outlook Express
- Fax - printer drivers and cover pages

- Nortel Fax Printer Driver - Install Fax printer driver
- Nortel Batch Fax Printer Driver - Install Batch Fax printer driver
- Fax Cover Pages - Install Fax cover pages

The following demonstrates the Custom installation for Microsoft Outlook mail profile. On the Setup Type screen, select the **Custom** radio button, and click **Next**.



To install Desktop Messaging on user workstations

- 1 Run setup.exe from the appropriate location (network folder or CD-ROM).
 - If you customized the installation program, you can either run setup.msi from the network location, or copy setup.ini from the

network location to a folder containing setup.exe, and then run setup.exe.



- If you did not set installation defaults, run setup.exe from the Desktop Messaging CD-ROM or a network folder.

Result: The setup program starts and the Welcome window appears.

- 2 Click **Next** to continue the installation, and then follow the prompts. For information about a specific option, refer to the online Help.

Installing Desktop Messaging in a Citrix Thin Client environment

The system administrator of a Citrix Thin Client environment must install and configure CallPilot Desktop Messaging on the Windows Terminal Server before users can access it. CallPilot should only be installed on the Windows Terminal Server; do not install CallPilot on the client computer.

After the installation process is complete, refer to the *Desktop Messaging and My CallPilot Administration Guide* for information on administering and configuring end users in the Citrix Thin Client environment.

Supported Platforms

Desktop Messaging in the Citrix Thin Client environment is supported on the CallPilot 4.0 platform.

The Desktop Messaging client supports the Citrix Metaframe XP on Windows 2000/2003 server; and Citrix Metaframe Presentation Server 3.0 on Windows 2003 server.

Citrix Thin Clients must be running Windows 2000, or Windows XP.

Installing CallPilot Desktop Messaging on the Windows Terminal Server

Installing CallPilot Desktop Messaging in a Citrix Thin Client environment is a straightforward process. It is nearly identical to installation in a standard desktop client environment. Deviations from the standard environment are detailed in this section.

The common desktop exceptions to the installation process for a standard environment include:

- **For Microsoft Outlook and Novell GroupWise:** The installer automatically disables the *Update default mail profile* feature. This feature is not applicable to the Windows Terminal Server.
- **For Lotus Notes:** The installer automatically disables the *Update Lotus Notes mail database* and *Update Lotus Notes Personal Address Book* features. These features are not applicable to the Windows Terminal Server.

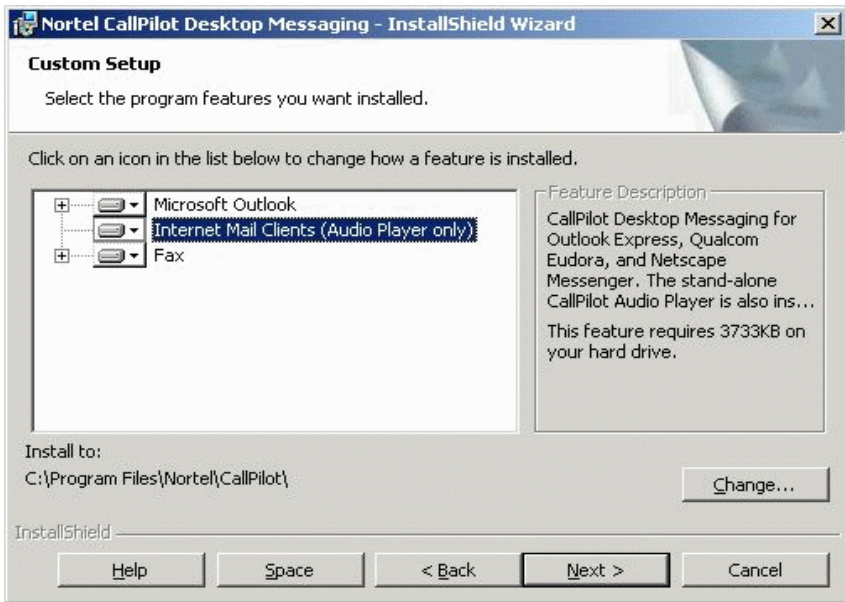
To update the users mail databases, the Lotus Notes/Domino server administrator must run the LNSERVER.EXE installation program on the Lotus Notes/Domino Server. The administrator can then use the installed utility application to update selected user mail databases with CallPilot design elements.

To enable the CallPilot address book, the Lotus Notes/Domino Server administrator must populate and maintain the CallPilot Public Address book on the server. The administrator may choose to call NMLNADBK.EXE as a scheduled task to automate the CallPilot Public Address Book update.

Preparing the Windows Terminal Server for My CallPilot

Users of My CallPilot are not required to install anything on their client computer. However, they are given the option of downloading the CallPilot audio player if My CallPilot detects it is not present.

The system administrator should run the Desktop Message installer, choose a Custom installation, and install the Internet Mail Clients (Audio Player only) on the Windows Terminal Server. This avoids any detection problems for the user and guarantees that all My CallPilot users have access to the audio player.



Configuring CallPilot in a Citrix Thin Client environment

When publishing applications on the Windows Terminal Server, the system administrator should manually update the program's command line. This is required to provide access to the Nortel Fax/Nortel Fax Batch printers.

This step may be skipped if access to the Nortel Fax/Nortel Fax Batch printers is not required. This step may also be skipped when publishing the Window's desktop.

To provide access to the Nortel Fax/Nortel Fax Batch printers

- 1 Add double quotes around the original command line (if not already present).

Example: "C:\Lotus\Notes\notes.exe"

- 2 Add the following text in front of the quoted command line for any application from which you wish to print (not just Lotus Notes):

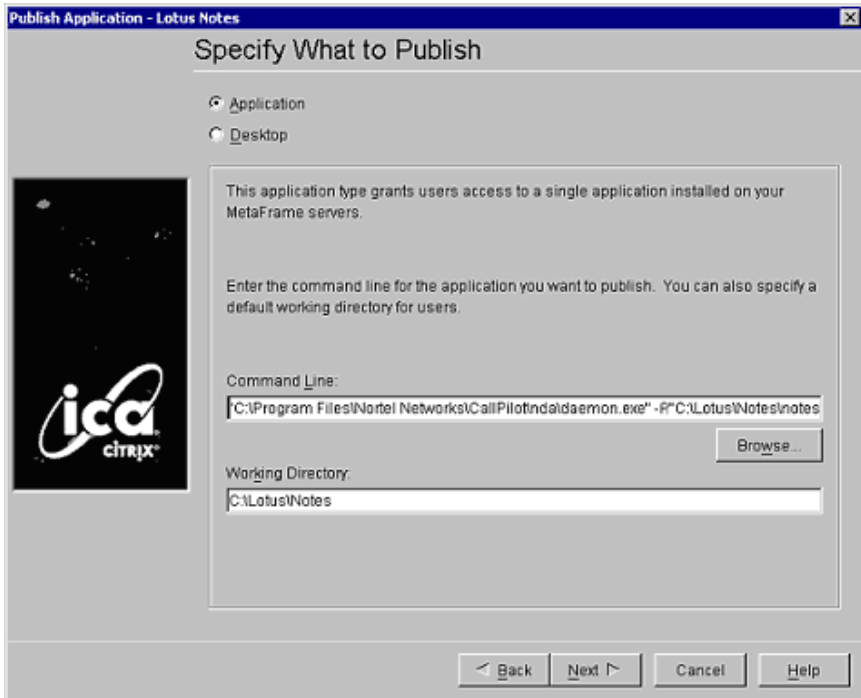
"C:\Program Files\Nortel\CallPilot\fax\daemon" -P (or in some cases -A)

The command line should now read:

Example: "C:\Program Files\Nortel\CallPilot\nda\daemon" -

A"C:\Lotus\Notes\notes.exe"

(the use of -A in this example, as opposed to -P, is explained below)



Note: The default CallPilot installation location is "C:\Program Files\Nortel\CallPilot". However, this may have been altered by the system administrator when CallPilot was installed.

The -P option should work for most applications. However, if an application still does not work with the Nortel Fax/Nortel Fax Batch printers, use the option -A instead of -P. Lotus Notes requires -A instead of -P.

The -P and -A options are both used by daemon.exe to monitor the original application for print requests. The -P option instructs daemon.exe to monitor only the original application. The -A option instructs daemon.exe to monitor the original application as well as any secondary applications created by the original. The -A option is more CPU intensive and should only be used when the -P option does not work.

My CallPilot requirements

Servers

My CallPilot 4.0 for Windows clients works well on CallPilot 2.0, 2.5, 3.0 and 4.0 servers.

Note: Support for the Macintosh Web Client, Redhat 9 Linux, requires My CallPilot 4.0, and may be run on CallPilot 2.0, 2.5, 3.0 and 4.0 servers.

You can install My CallPilot on the CallPilot server or on a separate web server. For optimal performance, a separate web server dedicated only to My CallPilot applications is recommended. If desired, you can install My CallPilot on the same stand-alone web server as CallPilot Manager and CallPilot Reporter.

You need approximately 50 Mbytes of disk space for My CallPilot. Nortel recommends an additional 100 Mbytes after installation for temporary files.

Place the web server on the customer LAN and not on the CallPilot ELAN. Most client-server communications are implemented using HTTP and the intermediary web server. In this way, you can deploy My CallPilot across your company's firewall to the Internet, with the option of using third-party certificate authority.

My CallPilot requires either:

- a Microsoft Internet Information Server 5 on Windows 2000 Server SP1 and above

or

- a Microsoft Internet Information Server 6 on Windows 2003

If you are unfamiliar with the operation and administration of Internet Information Services (IIS), contact your IS administrator for assistance.



CAUTION

Risk of system interruption or malfunction

Do not download and install any IIS security patches from the Microsoft web site unless they have been approved for CallPilot by Nortel. Installation of unapproved security patches may result in incorrect operation of your CallPilot system.

To determine which patches have been approved by Nortel, refer to the latest issue of the *CallPilot General Release Bulletin*.

Server configuration

The server configuration described in Section B: “Configuring the CallPilot server” is required for both Desktop Messaging and My CallPilot. Ensure that the CallPilot server is properly configured before you begin My CallPilot installation.

After My CallPilot installation, you can assign access to My CallPilot features and set up web server security.

For information about assigning access to features and configuring the Useful Information section of My CallPilot, see Section E: “Controlling access to features,” on page 109.

For information about web server security, refer to Chapter 3, “Additional Server Configuration,” in the *Desktop Messaging and My CallPilot Administration Guide* (NTP 555-7101-503).

User workstation requirements

My CallPilot clients require the same hardware as Desktop Messaging.

Web browser requirements

My CallPilot supports the following web browsers:

- Microsoft Internet Explorer 6.0
- Netscape 6.2, 7.0, 7.1 and 7.2
- Mozilla 1.7.x and Mozilla FireFox 1.0 on RedHat Linux 9 Operating System
- Microsoft Internet Explorer 5.1 on Mac OS 9

Note: Partial support is available for My CallPilot with Microsoft Internet Explorer 5.2 on Mac OS X. Users with Mac OS X can play and view CallPilot messages in the browser using a supported WAV player and picture viewer. Users with Mac OS X are not able to compose, send and reply to messages. In addition, Mac OS X users cannot use CallPilot Player and Fax Viewer.

Javascript and cookies must be enabled in the web browser.

Additional software

Some My CallPilot features require additional software as follows:

To	You need
Play voice messages	<ul style="list-style-type: none">■ CallPilot Player to play files in VBK format■ Windows Media Player to play files in WAV format
Record voice messages	CallPilot Player or an audio editor that can record messages in WAV format
View fax messages	third party software to display TIFF-F files
Create fax messages	Nortel Fax driver (included with Desktop Messaging) or an application that can create images in TIFF-F format

To	You need
View online guides in PDF format	Adobe Acrobat Reader

You can download CallPilot Player and Windows Media Player from the My CallPilot web site. In My CallPilot, click the CallPilot Features tab, and then click the Downloads link to access the software.

Note: Some of the links are associated with external sites.

Installing My CallPilot for Windows

Preparing for My CallPilot installation

Before installing CallPilot web applications, ensure that:

- you have all the information you need in the Pre-installation Checklist
- an operational version of IIS 5 or IIS 6 is installed on the server
- you have removed any previous versions of My CallPilot from the IIS server
- user workstations have the required software for My CallPilot

For more information, see “My CallPilot requirements” on page 91.

To uninstall My CallPilot

If an earlier version of My CallPilot (also known as “Web Messaging” in early releases) is installed, you must uninstall it before installing your new My CallPilot software.

- 1 In the Windows Control Panel, double-click **Add/Remove Programs**.
- 2 Select My CallPilot (or Web Messaging), and then click **Add/Remove**.
- 3 Click **Uninstall** to start the uninstallation program.

Result: The IIS service stops and the My CallPilot virtual directory is deleted.

If the web client fails to stop the World Wide Web service or seems to hang while you stop the service, you may need to restart the computer and attempt to re-uninstall My CallPilot.

To install My CallPilot

This procedure can be done in conjunction with the IS administrator.

- 1 Log on to your IIS computer with administrator privileges.
- 2 Run the installation program (setup.exe) from the My CallPilot from Nortel CD-ROM (NTRH4593).

The installation program is located in the root directory of the CD-ROM.

Result: The Welcome window appears.

- 3 Click **Next** to continue the installation, and then follow the prompts.

For information about a specific option, refer to the online Help.

My CallPilot web server setup

An important final step is to update the CallPilot web server settings and to enable or disable SSL encryption for communication with the My CallPilot web server. Run the “My CallPilot Administration Utility” as described in the *Desktop Messaging and My CallPilot Administration Guide* (NTP 555-7101-503).

To test the installation

- 1 Go to a client computer that has the required software for My CallPilot.
- 2 Start **Internet Explorer** or **Netscape**.
- 3 Type the My CallPilot URL in the following format:

http://<webservername>/<virtual_directory_name>

Result: In a few seconds, the Logon page appears.

- 4 Log on to My CallPilot.

My CallPilot web server security

For information about setting up a secure environment for My CallPilot web server access, refer to the *Desktop Messaging and My CallPilot Administration Guide* (NTP 555-7101-503).

Installing the Macintosh My CallPilot Web Client

Preparing for My CallPilot installation

Before installing CallPilot web applications, ensure that:

- you have all the information you need in the Pre-installation Checklist
- an operational version of IIS 5 or IIS 6 is installed on the server
- user workstations have the required hardware and software for My CallPilot

For more information, see “My CallPilot requirements” on page 91.


To install My CallPilot Web client on a Mac

- 1 Using your web browser, navigate to the My CallPilot web site, which is the virtual directory you created during installation.
- 2 Type the My CallPilot URL in the following format:

http://<webservername>/<virtual_directory_name>

Result: In a few seconds, the Logon page appears.

- 3 Log on to My CallPilot.
- 4 Download the MacPlayer_enu.sit file to your hard disk by clicking the CallPilot Player link in the Downloads page of My CallPilot:



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

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


Mailbox: Tim Schweitzer (7401)

Downloads

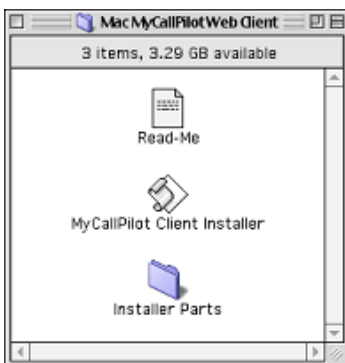
Click the name of the software to begin downloading.

Software	Remarks
CallPilot Web Client	Plays and records CallPilot voice messages. The Web Client also allows you to view and print CallPilot faxes, and it can create faxes for attaching to messages composed via My CallPilot.
QuickTime™ Media Player	The recommended player for WAV format files.

Notes:

- The Macintosh CallPilot Web Client works with Mac OS releases 9.0 through 9.2.
- The QuickTime™ Media Player link is to an external web site and requires Internet access.
- The recommended fax / TIFF viewer is the CallPilot Web Client. QuickTime™ can open CallPilot faxes, but it will only allow you to view the first page of a multi-page fax.
- For the best My CallPilot experience, we recommend using Internet Explorer 5 or later. You can download the latest version by clicking this icon: 

- 5 If the browser does not automatically unstuff the archive, then double-click the MacPlayer_enu.sit file to decompress it into a folder called My CallPilot Web Client. When done, the following window is displayed:



- 6 Before running the Installer, double-click the Read-Me file for last-minute information and notices.

7 Run the AppleScript-based My CallPilot Client Installer applet. This script performs the following actions:

- Displays a dialog to inform you that it is running.
- Asks you where to install the CallPilot software.
- Copies the support AppleScript extensions ("Dialog Director" and "InternetConfig Commands") into the Scripting Additions folder of the System folder. This enables additional commands that are needed to complete the installation.
- Copies the CallPilot application, CallPilot Server Settings, and CallPilot Uninstaller into the selected location.
- Copies the CallPilot Fax and CallPilot Fax Spooler into the Extensions folder.
- Makes an alias of the CallPilot application and puts it into the Apple Menu Items folder.
- Adds file mappings for audio and fax into the Internet Config database.

The program informs you when installation is complete. You should then delete the installation folder.

8 Run the CallPilot Player application and configure your Preferences.

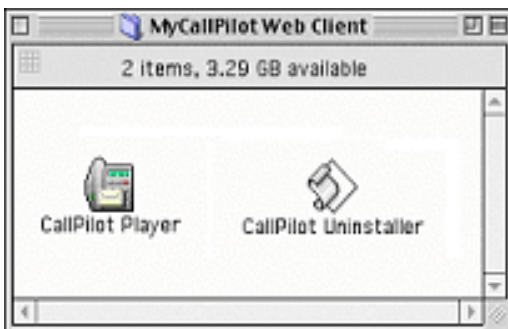


The default is: Macintosh Audio Device, with all settings checked.

To do an Installation verification

Verify that installation was successful by performing the following:

- 1 Check that the CallPilot application was installed by locating and opening the folder that you specified during installation:



- 2 Verify that the CallPilot Fax driver was installed by opening the Chooser accessory and checking if the CallPilot Fax icon is displayed.

Uninstalling the My CallPilot Web Client

To uninstall the My CallPilot Web Client software, locate the installation folder and launch the CallPilot Uninstaller applet. This applet removes all of the My CallPilot Web Client software from your Macintosh.

Support for Mozilla and FireFox browsers on Linux OS

My CallPilot 4.0 supports Mozilla 1.7.x and Mozilla FireFox 1.0 browsers on RedHat Linux 9 OS. My CallPilot 4.0 also supports Internet Explorer 6.0 and Netscape (6.2, 7.0, 7.1 and 7.2) on Windows OS.

Note: My CallPilot 4.0 Desktop Messaging client is not supported on Linux.

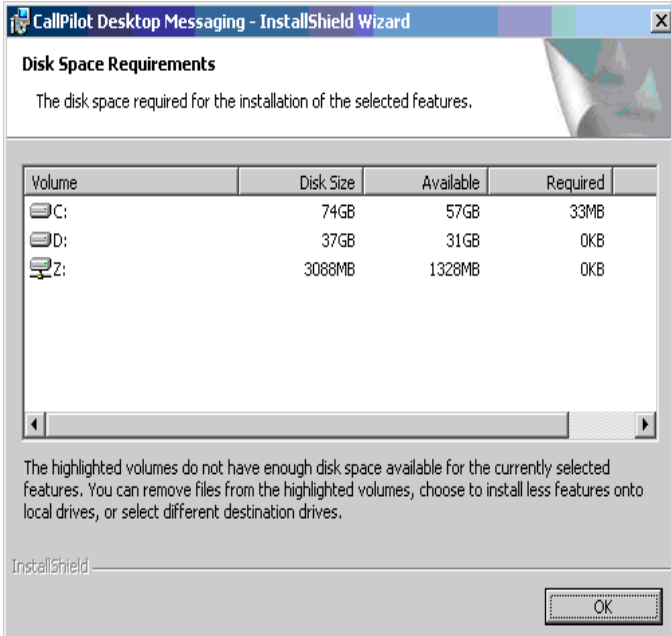
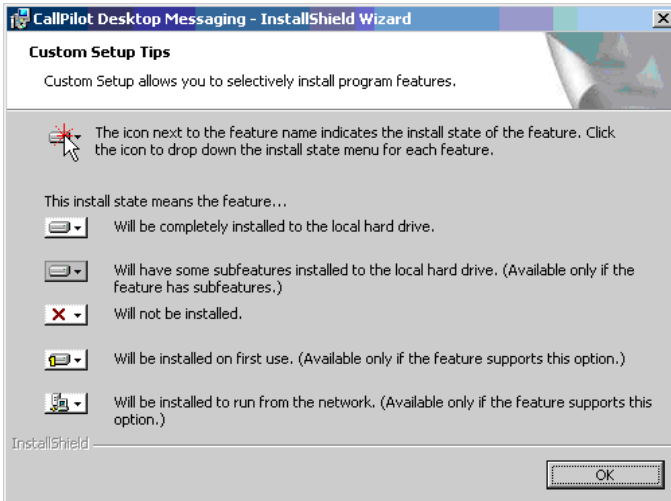
With Linux, you can view and play CallPilot messages in the browser using a supported WAV player. RedHat Linux 9 OS and Mozilla or Firefox browser is required to use WAV playback or recording, and Fax viewing or sending.

Users have full access to the “Useful Features” tab, permitting the viewing of text and listening to audio messages using the WAV audio format. Supported WAV format record/playback applications include:

- Audacity 1.2x
- Gnome Sound Recorder 2.x
- Krecord 1.1

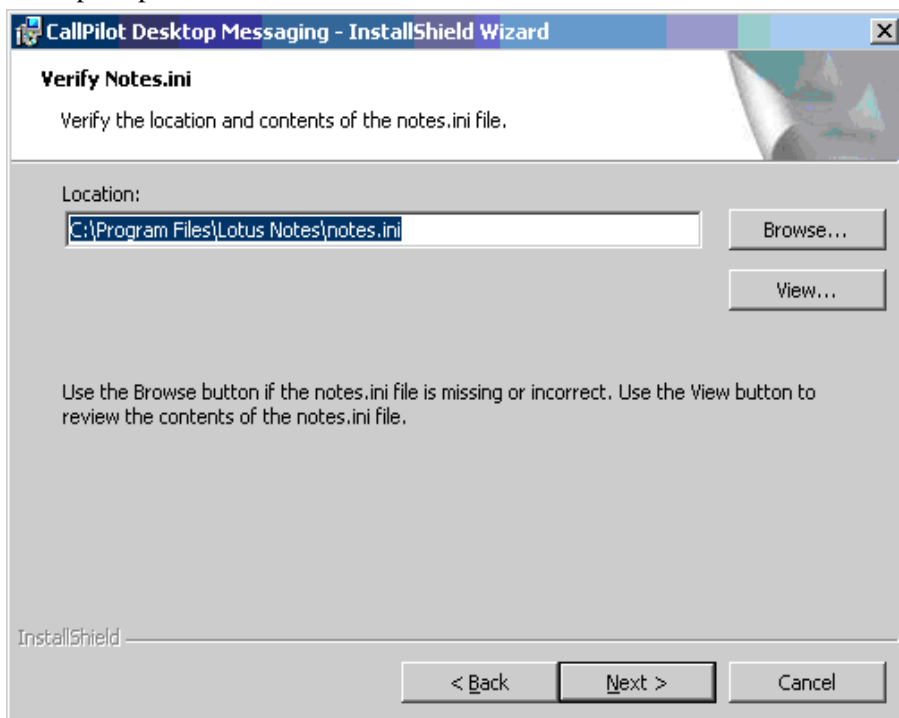
Custom Setup Tips

The two following figures display the Custom Setup Tips and Disk Space requirements for the Hard Drives on the system.



Lotus Notes Installation

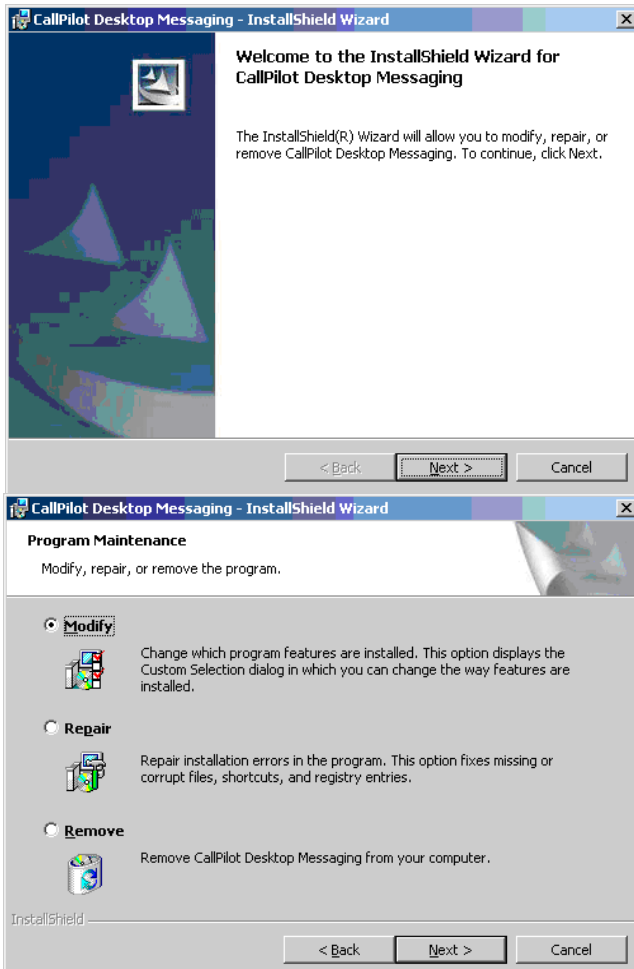
If CallPilot Desktop Messaging for Lotus Notes is to be installed, the user is prompted for the location of the notes.ini file.



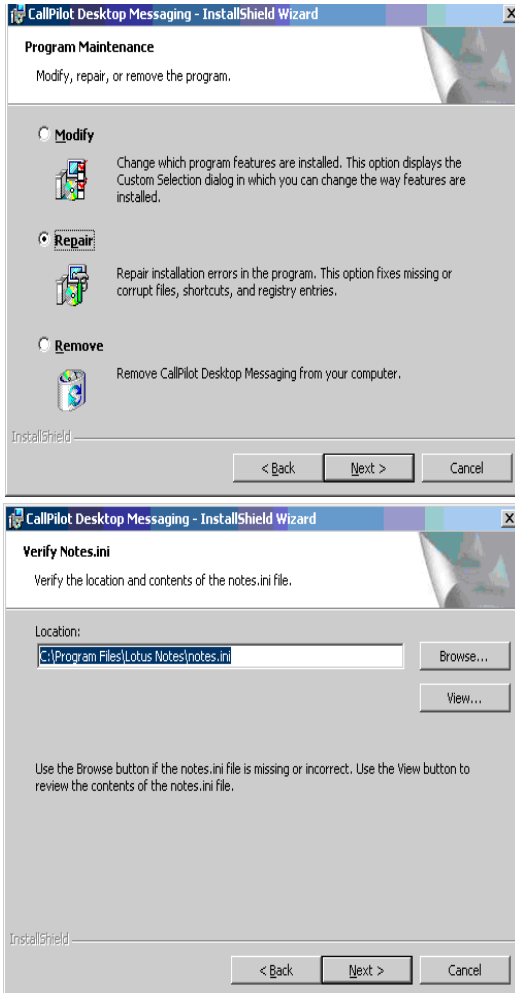
Note: If the wrong notes.ini file is selected, CallPilot Desktop Messaging for Lotus Notes is not installed properly. To correct the problem re-run setup.exe or setup.msi in Maintenance Mode and select **Repair**.

Maintenance mode

Once the software has been installed, setup.exe or setup.msi can be run again to alter CallPilot Desktop Messaging. When run again, the software starts in Maintenance Mode. Similar to Installation Mode, but showing what features are installed and permitting changes to the installed features, repair of corrupted files, or removal of CallPilot Desktop Messaging.

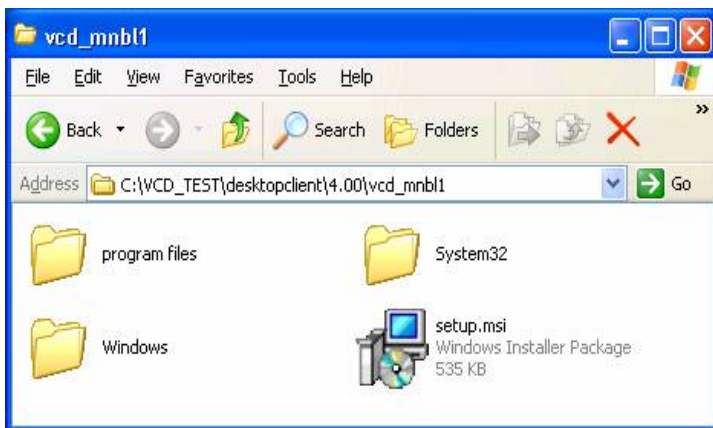


In addition to changing the installed features in Maintenance Mode, users can select repair to fix an installation problem. For example, to change or update the location of the notes.ini file.

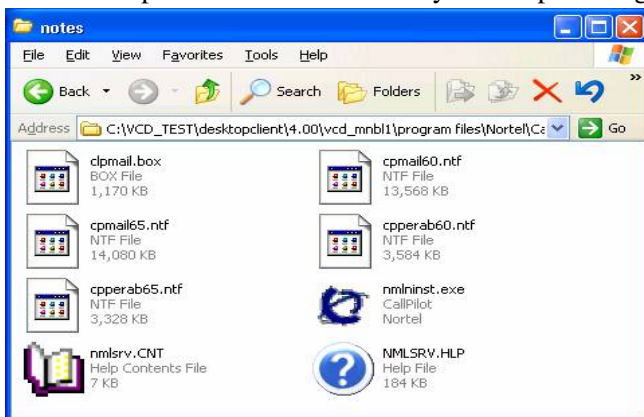


Customizing Lotus Notes Templates

If you need to create customized Lotus Notes template files, first customize the entire installation by running `setup.exe /A`. This will create a customized network installation with all CAB files uncompressed. See Benefits of customized installation on page 34 for information on customizing installations.



Navigate to the `\program files\Nortel\CalPilot\Notes` folder, you find the Lotus Notes templates that are installed by Desktop Messaging.



You can directly modify the templates, replacing the original version. When you run **setup.msi** to install Desktop Messaging (there is no setup.exe after running setup.exe /A), the modified templates are copied to your computer.

Section E: Controlling access to features

In this section

Overview of feature access options	110
Controlling access to Desktop Messaging features	112
Centralized Control of Desktop Messaging features	115
CallPilot server configuration for My CallPilot services	128

Overview of feature access options

Introduction

To provide users with access to Desktop Messaging, mailbox classes and restriction/permission lists (RPL) must be set up correctly. For details about RPLs and mailbox classes, refer to the *CallPilot Administrator's Guide* (NTP 555-7101-301), or the CallPilot Manager online Help.

Mailbox classes

A mailbox class is a defined set of CallPilot access rights that you assign to a group of users. The capabilities that you enable affect the features and services available to users.

Consider the following feature interactions when you are creating a mailbox class for users of Desktop Messaging and My CallPilot:

- You can assign Desktop Messaging capability with or without fax capability.
- Configuration of some features is only available from My CallPilot. For example, users can only set preferences for E-mail-by-Phone from My CallPilot.
- Some features are easier to use in My CallPilot. For example, you can assign a name and number to a personal distribution list (PDL) in My CallPilot. From the telephone, you can only assign a number to a PDL.

Restriction Permission Lists (RPL)

At least one RPL is associated with a mailbox class that has been assigned Desktop Messaging capability. CallPilot applies the Desktop Messaging RPL to all messages sent from the Desktop Messaging client's mailbox. If a message requires a feature that has an additional RPL associated with it, then CallPilot applies both RPLs to the call. For example, if a user sends a message to a fax machine, the Desktop Messaging RPL and the Delivery to Telephone RPL are both applied.

Controlling access to Desktop Messaging features

Introduction

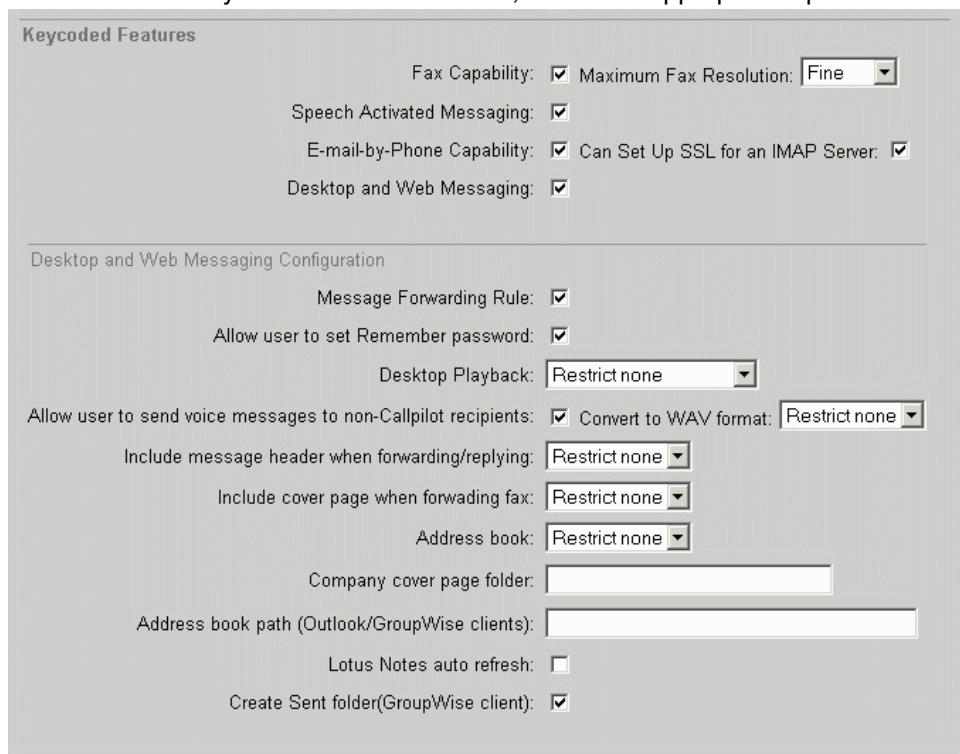
You can control access to Desktop Messaging from CallPilot Manager and specify restrictions for audio device usage and fax messaging. Access rights are assigned in the mailbox class.

To set Desktop Messaging privileges

- 1 In CallPilot Manager, choose **User> Mailbox Classes**.
- 2 In the mailbox class list, click the name of the appropriate mailbox class.

Result: The Mailbox Class Browser screen appears.

3 In the Keycoded Features section, select the appropriate options.



Keycoded Features

Fax Capability: ☒ Maximum Fax Resolution:

Speech Activated Messaging: ☒

E-mail-by-Phone Capability: ☒ Can Set Up SSL for an IMAP Server: ☒

Desktop and Web Messaging: ☒

Desktop and Web Messaging Configuration

Message Forwarding Rule: ☒

Allow user to set Remember password: ☒

Desktop Playback:

Allow user to send voice messages to non-Callpilot recipients: ☒ Convert to WAV format:

Include message header when forwarding/replying:

Include cover page when forwarding fax:

Address book:

Company cover page folder:

Address book path (Outlook/GroupWise clients):

Lotus Notes auto refresh: ☐

Create Sent folder(GroupWise client): ☒

- To grant access to Desktop Messaging features, enable Desktop and Web Messaging capability.
- To restrict audio playback and recording to either the computer or telephone, select the appropriate option in the Desktop Playback list.
- To allow users to send and receive CallPilot fax through the telephone or desktop interface, enable Fax Capability. To allow users to send and receive CallPilot text through the telephone or desktop interface, enable Text Capability.

Note: When retrieving a message with an attachment via the telephone interface, regardless of whether it is a fax or text message, CallPilot notifies the user that there is an attached fax message. The

only way to view an attached text message is through the desktop interface.

- 4 Click **Save**.

Centralized Control of Desktop Messaging features

Introduction

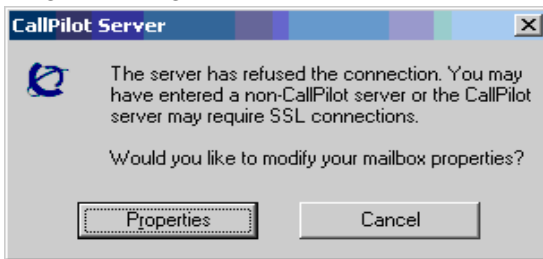
The Centralized Control of Desktop Options feature permits the system administrator greater control over the features of the CallPilot Desktop Messaging client. The administrator controls which features are enabled through Class of Service settings on the CallPilot Server.

Note: Changes made to centralized control of the desktop Class of Service settings are not detected while desktop client is running; a user must close the desktop and logon again to enable changes.

CallPilot 4.0 adds the following new Class of Service (COS) settings:

Require Secure Sockets Layer (SSL)

- There are three separate Require SSL check boxes; IMAP, SMTP, and LDAP. When checked, the IMAP, SMTP and LDAP connections from desktop clients or My CallPilot must be encrypted using SSL, and corresponding ports set to SSL equivalents. A user sees an error dialog box at logon if SSL has not been enabled.



To view IMAP and SMPT check boxes

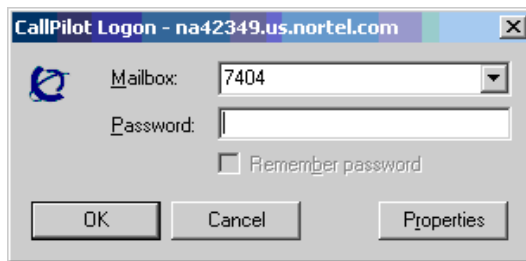
- 1 **View >Options**
- 2 Click tab **MAIL > Advanced**

To view LDAP check box:

- 1 **View > Options**
- 2 Click tab **Address Book> Advanced**

Allow user to set Remember Password (applicable to Microsoft Outlook, Lotus Notes, and Novell GroupWise)

- When the box is unchecked, the user is not able to check Remember Password option when logging on to CallPilot server. If the password had been previously stored in the registry, it is removed.

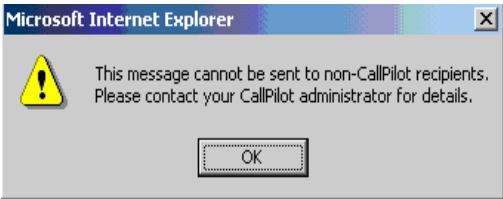
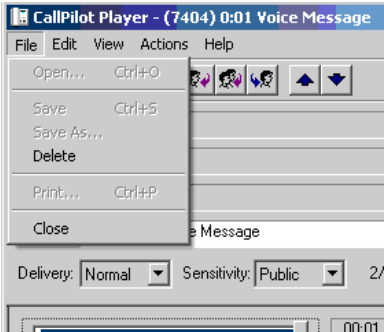
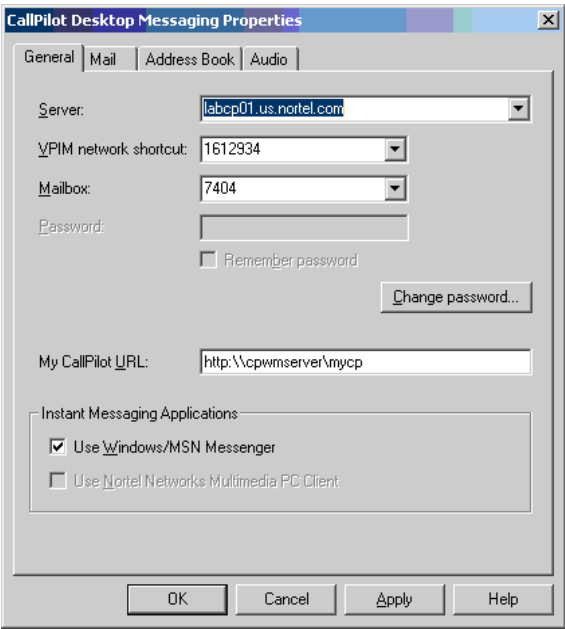


Allow user to send Voice Messages to non-CallPilot Recipients

- When the box is unchecked, the user is unable to save audio attachments or forward voice messages to non-CallPilot recipients.

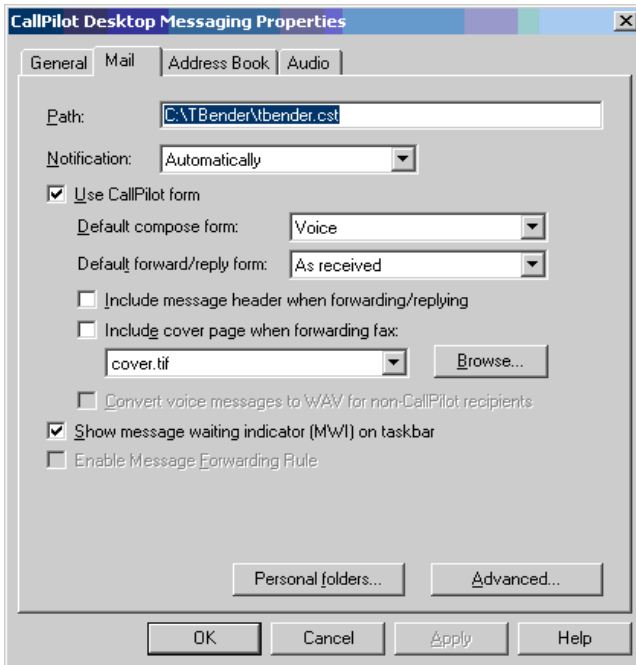
Note: If a user attempts to forward a message to a non-CallPilot recipient employing Microsoft Outlook standard e-mail form, it *appears* to work. In reality, the recipient of the message only receives the VBK header of the audio message; audio data is not sent.

- CallPilot Player drop-down menu with the **Save/Save As** disabled.
- Message cannot be sent to non-CallPilot recipients dialog box



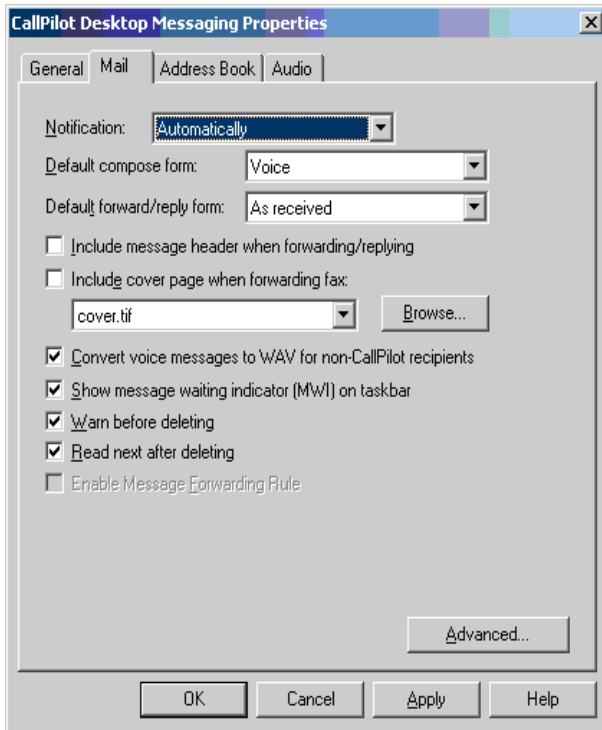
Convert to WAV Format

- If convert to WAV is set to “Never”, the option “Convert voice message to WAV” is unchecked and grayed out. If set to “Always”, the option is checked and grayed out.
- If convert to WAV is set to “Restriction none”, the user is able to modify the “Convert voice messages to WAV for non-CallPilot recipients” option.



Include Message Header when forwarding/replying

- If Include message header when forwarding/replying is set to “Never,” the Desktop client configuration option “include message header when forwarding/replying,” is unchecked and grayed out.
- If Include message header when forwarding/replying is set to “Restriction none,” the user is able to choose how messages are sent using Desktop client configuration.



Include Cover Page when Forwarding Fax

- If Include cover page when forwarding fax is set to “Never,” the Desktop client configuration option “Include cover page when forwarding fax,” is unchecked and grayed out.
- If Include cover page when forwarding fax is set to “Restriction none,” user is able to control this setting from Desktop configuration.

Address Book

- If the Address Book selection is set to “Server,” the Desktop client configuration option “Use server address book,” is checked.
- If Address Book selection is set to “Local,” the option “Use local copy of server address book,” is checked.

- In both selections, “Server” or “Local,” the address book selection controls are grayed out.
- If the Address Book selection is set to “Restrictions none,” the user is able to choose the desired address book. The default value is the Local Address Book
- The address book path for Outlook and GroupWise, if not empty, is set to the common location for address book.

Company Cover Page Folder

- If the company cover page folder is not empty, the path to the cover pages folder is automatically set for all users.
- If the company cover page folder is empty users must maintain their own cover page folder.
- Fax cover pages available to the user may vary dependent on where cover page folder path points. The default setting is an empty string.

Lotus Notes Auto Refresh

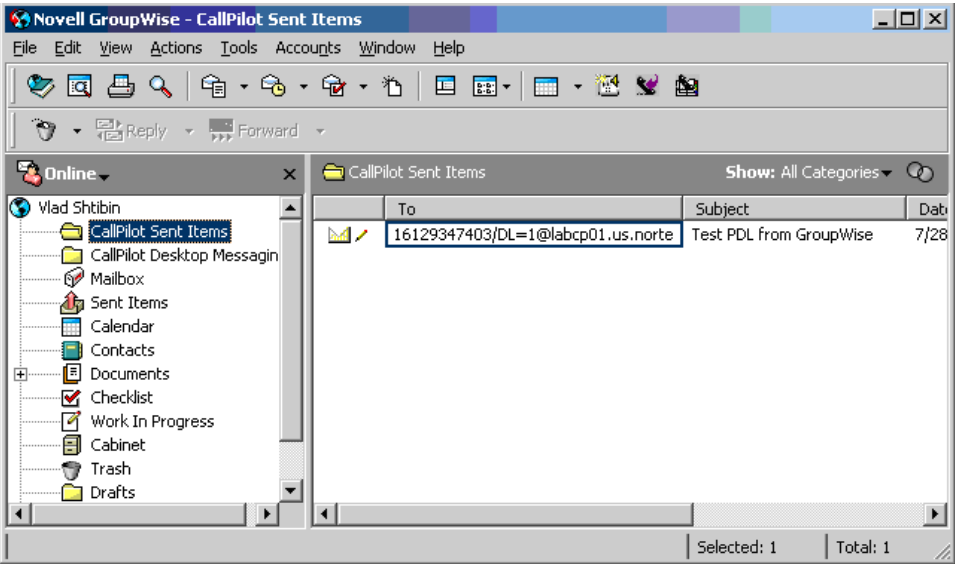
- If Lotus Notes auto refresh is checked CallPilot messages are automatically added to Lotus Notes CallPilot view. This impacts network performance if there are a large number of e-mail or CallPilot messages.
- If unchecked Lotus Notes users must manually refresh their CallPilot view (F9) to see new CallPilot messages. Network performance is less affected by this method.

Note: Impact on network performance is due to Lotus Notes trying to synchronize with the Domino server.

- When connected to CallPilot 4.0, the CallPilot view (F9) is hidden. The user is not able to check or uncheck Lotus Notes Refresh Agent.

Create Sent Folder (GroupWise)

- If the create sent folder is checked, CallPilot Sent Folder is created in GroupWise mail database, and the option to “Create Sent Item” is available to user.



- If the create sent folder is unchecked, the CallPilot Sent Items folder is not created, or deleted if already created, and the option to “Create Sent Item” is hidden.

Access levels for My CallPilot

The following subsections describe levels of access you can provide for My CallPilot:

Reference information and documentation only

If you disable keycoded features and Mailbox Manager, My CallPilot only provides access to the Useful Information area, the Downloads page, and selection of the default My CallPilot tab.

This level of access is appropriate for mailbox owners who usually access their CallPilot mailbox by telephone, and who do not require Desktop Messaging, web messaging, or telephone access to e-mail (E-mail-by-Phone).

Fax Capability: ☐ Maximum Fax Resolution:

Fine

Speech Activated Messaging: ☐

E-mail-by-Phone Capability: ☐ Can Set Up SSL for an IMAP Server: ☐

Desktop and Web Messaging: ☐

Desktop and Web Messaging Configuration

Message Forwarding Rule: ☐

Allow user to set Remember password: ☒

Desktop Playback:

Restrict PC playback

Allow user to send voice messages to non-CallPilot recipients: ☒ Convert to WAV format:

Restrict none

Include message header when forwarding/replying:

Restrict none

Include cover page when forwarding fax:

Restrict none

Address book:

Local

Company cover page folder:

Address book path (Outlook/GroupWise clients):

Lotus Notes auto refresh: ☐

Create Sent folder(GroupWise client): ☒

My CallPilot

Mailbox Manager: ☐

CallPilot Manager
A mailbox class with access to reference information only.

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

Mailbox: Nicola Yap (7240)

My CallPilot

My CallPilot options available for the mailbox class.

[CallPilot Tools](#)[Telephone Settings](#)[Web Settings](#)[Downloads](#)

Download audio players for use with My CallPilot.

[My CallPilot Home Page](#)

Set preferred page to start on after logging on.

Mailbox management only

Since My CallPilot provides a graphical interface for configuring mailbox options, mailbox owners who do not require keycoded features can still benefit from web-based access to mailbox management.

Configuration of features, such as remote notification and personal distribution lists, is simple and accessible from any location with Internet access.

The screenshot displays the 'My CallPilot' configuration window. It is divided into several sections:

- Keycoded Features:** Includes checkboxes for 'Fax Capability', 'Speech Activated Messaging', 'E-mail-by-Phone Capability', and 'Desktop and Web Messaging'. A 'Maximum Fax Resolution' dropdown is set to 'Fine'. 'Can Set Up SSL for an IMAP Server' is checked.
- Desktop and Web Messaging Configuration:** Includes 'Message Forwarding Rule' (checked), 'Allow user to set Remember password' (checked), 'Desktop Playback' (dropdown set to 'Restrict none'), and 'Allow user to send voice messages to non-Callpilot recipients' (checked). It also has a 'Convert to WAV format' dropdown set to 'Restrict none'.
- Forwarding/Replying Options:** Includes checkboxes for 'Include message header when forwarding/replying', 'Include cover page when forwarding fax', and 'Address book', all with dropdowns set to 'Restrict none'.
- Address Book and Folders:** Includes a text field for 'Company cover page folder' and another for 'Address book path (Outlook/GroupWise clients)'.
- Other Settings:** Includes 'Lotus Notes auto refresh' (unchecked) and 'Create Sent folder(GroupWise client)' (checked).
- My CallPilot:** At the bottom, there is a 'Mailbox Manager' checkbox which is checked.

CallPilot Manager

A mailbox class with mailbox management only.

CallPilot Features

Useful Information

Mailbox: Nicola Yap (7240)

CallPilot Tools

Telephone Settings

Web Settings

[Message Notification](#)

Set options and maintain your schedule for notification of new CallPilot messages at remote telephone, pager, or text device.

[Telephone Options](#)

Review and personalize your telephone interface and options presented to your callers.

[My CallPilot Home Page](#)

Set preferred page to start on after logging on.

[Personal Distribution Lists](#)

Compose and edit lists of addresses to simplify messaging to groups of people.

[Change Password](#)

[Downloads](#)

Download audio players for use with My CallPilot.

My CallPilot

My CallPilot options available for the mailbox class.

Keycoded features enabled without additional mailbox management

When you enable keycoded features, the associated configuration options appear in My CallPilot. My CallPilot provides configuration options for:

- fax messaging
- desktop and web messaging
- E-mail-by-Phone

If some mailbox owners require keycoded features, and only access My CallPilot occasionally to change their preferences, you can enable the required keycoded features and disable Mailbox Manager.

Note: E-mail-by-Phone and web messaging options are only accessible from My CallPilot.

Keycoded Features

Fax Capability: ☒ Maximum Fax Resolution:

Fine

Speech Activated Messaging: ☐

E-mail-by-Phone Capability: ☐ Can Set Up SSL for an IMAP Server: ☐

Desktop and Web Messaging: ☐

Desktop and Web Messaging Configuration

Message Forwarding Rule: ☒

Allow user to set Remember password: ☒

Desktop Playback:

Restrict none

Allow user to send voice messages to non-CallPilot recipients: ☒ Convert to WAV format:

Restrict none

Include message header when forwarding/replying:

Restrict none

Include cover page when forwarding fax:

Restrict none

Address book:

Restrict none

Company cover page folder:

Address book path (Outlook/GroupWise clients):

Lotus Notes auto refresh: ☐

Create Sent folder(GroupWise client): ☒

My CallPilot

Mailbox Manager: ☐

CallPilot Manager

A mailbox class with fax capability. Mailbox management is disabled.

CallPilot Features

Useful Information

Mailbox: Nicola Yap (7240)

CallPilot Tools

Telephone Settings

Web Settings

Downloads

Download audio players for use with My CallPilot.

Fax Printing

Set fax numbers and options for printing fax and e-mail messages.

My CallPilot Home Page

Set preferred page to start on after logging on.

My CallPilot

My CallPilot options available for the mailbox class.

Keycoded features enabled with mailbox management

When you enable keycoded features for a mailbox class, you can also enable Mailbox Manager to provide access to mailbox management features.

If you enable fax capability or E-mail-by-Phone capability, Mailbox Manager is optional. If you enable desktop and web messaging capability, Mailbox Manager is required.

Keycoded Features

Fax Capability: ☒

Maximum Fax Resolution:

Fine

Speech Activated Messaging: ☐

E-mail-by-Phone Capability: ☒

Can Set Up SSL for an IMAP Server: ☐

Desktop and Web Messaging: ☐

Desktop and Web Messaging Configuration

Message Forwarding Rule: ☒

Allow user to set Remember password: ☒

Desktop Playback:

Restrict none

Allow user to send voice messages to non-Callpilot recipients: ☒

Convert to WAV format:

Restrict none

Include message header when forwarding/replying:

Restrict none

Include cover page when forwarding fax:

Restrict none

Address book:

Restrict none

Company cover page folder:

Address book path (Outlook/GroupWise clients):

Lotus Notes auto refresh: ☐

Create Sent folder(GroupWise client): ☒

My CallPilot

Mailbox Manager: ☐

CallPilot Manager

A mailbox class with keycoded features and mailbox management. Mailbox Manager is optional.

Keycoded Features

Fax Capability: ☒

Maximum Fax Resolution:

Fine

Speech Activated Messaging: ☐

E-mail-by-Phone Capability: ☒

Can Set Up SSL for an IMAP Server: ☐

Desktop and Web Messaging: ☒

Desktop and Web Messaging Configuration

Message Forwarding Rule: ☒

Allow user to set Remember password: ☒

Desktop Playback:

Restrict none

Allow user to send voice messages to non-Callpilot recipients: ☒

Convert to WAV format:

Restrict none

Include message header when forwarding/replying:

Restrict none

Include cover page when forwarding fax:

Restrict none

Address book:

Restrict none

Company cover page folder:

Address book path (Outlook/GroupWise clients):

Lotus Notes auto refresh: ☐

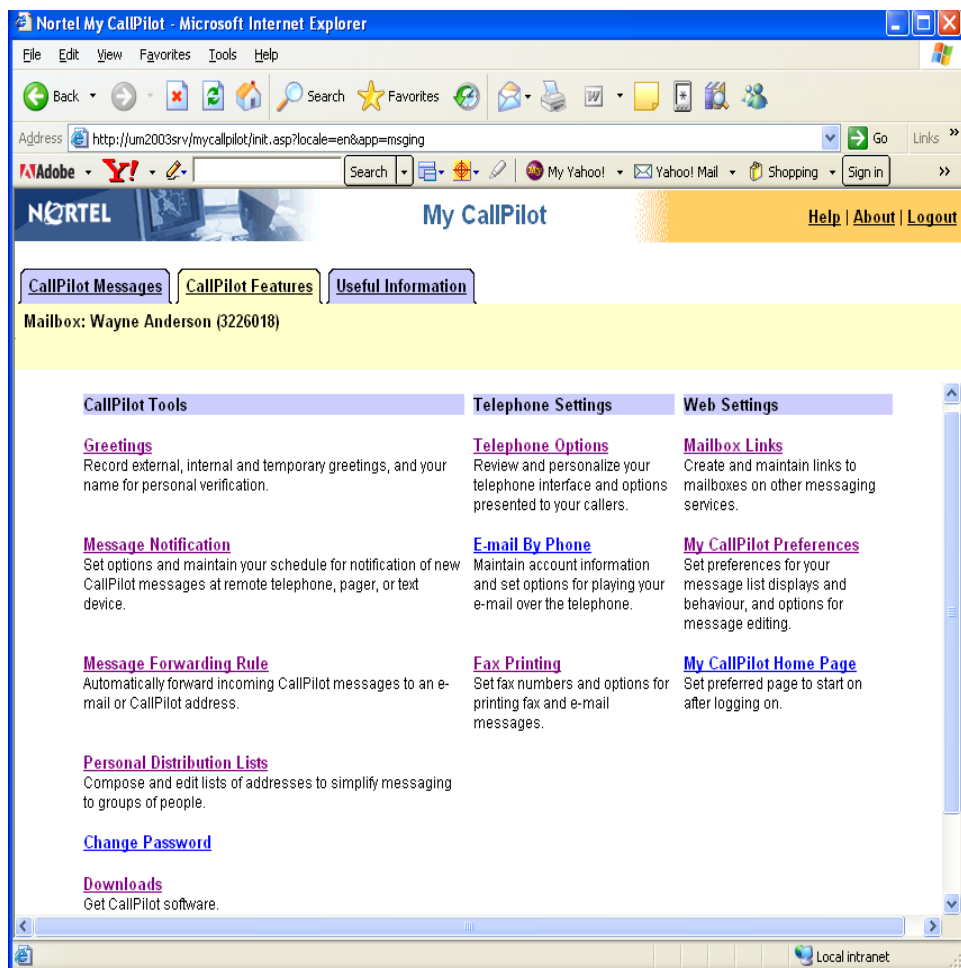
Create Sent folder(GroupWise client): ☒

My CallPilot

Mailbox Manager: ☐

CallPilot Manager

A mailbox class that includes desktop and web messaging. Mailbox manager is required.



My CallPilot

My CallPilot options available for a mailbox class that includes all keycoded features that have associated options in My CallPilot.

CallPilot server configuration for My CallPilot services

Overview

This section briefly describes how to configure CallPilot server for several services available in My CallPilot.

Providing user reference information

My CallPilot includes a Useful Information section that provides reference information and online documentation for users. In CallPilot Manager, you can specify the following support information:

- a system-wide message that appears whenever a mailbox owner logs on to My CallPilot
- dialing numbers for your CallPilot system, such as the Voice Messaging DN and the ESN access code
- local contact information for your CallPilot support staff

To specify support information

- 1 In CallPilot Manager, choose **Tools> My CallPilot Configuration**. The My CallPilot Configuration screen appears.
- 2 Specify the support information, as required. For information about a specific option, see the online Help.

Specifying external e-mail servers

You can specify multiple IMAP servers that users can access from My CallPilot or from the telephone. To permit users access to e-mail from My CallPilot, you must enable Desktop and Web Messaging capability for the mailbox. To permit access to e-mail from the telephone, you must enable the E-mail-by-Phone capability for the mailbox.

To configure external e-mail servers

- 1 In CallPilot Manager, choose **Messaging> External E-mail Servers**.
- 2 In the External E-mail Server list, define the servers users can access with E-mail-by-Phone and from My CallPilot. For such servers, the TLS Port field should be set to 0 unless that server supports Secure Socket Layer (SSL) IMAP connections.

For more information, refer to the CallPilot Manager online Help.

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Desktop Messaging and My CallPilot Installation Guide

CallPilot

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