Nortel CallPilot

Desktop Messaging and My CallPilot Installation and Administration

NN44200-305

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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 lets you:

- 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

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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.

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Chapter 2
Getting started

This chapter contains the following topics:

"Introduction" (page 11)

"Product Overview" (page 12)

"Related information" (page 12)

"Messaging server compatibility" (page 16)

"Desktop Messaging and My CallPilot preinstallation checklist" (page 19)

Introduction

This guide describes how to install Desktop Messaging and My CallPilot. It also provides instructions for configuring Desktop Messaging e-mail clients, configuring servers for Desktop Messaging and My CallPilot after installation, and troubleshooting information.

This guide is intended for the CallPilot* system administrator.

For information about features or options that are controlled by the user, see the following guides:

- *Desktop Messaging User Guide for Microsoft Outlook*
- *Desktop Messaging User Guide for Lotus Notes*
- *Desktop Messaging User Guide for Novell GroupWise*
- *Desktop Messaging User Guide for My CallPilot*

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Product Overview

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.
- Voice form transcription--manage and transcribe callers' responses to your company's voice form applications.

An example of a My CallPilot URL would be http://cp600r/mycallpilot.

Related information

User documentation

All user guides for CallPilot 5.0 are in Adobe PDF format. 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 to a location in your network that is accessible to all CallPilot mailbox owners. The following diagram shows the documentation available to you for your CallPilot system.

Technical documentation

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

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

  A user ID and password is required to access the PIC. If you do not have a PIC account, click Register to request an account.

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Call Pilot Customer Documentation Map

Fundamentals

- Fundamentals Guide (NN44200-100)
- Library Listing (NN44200-117)

Planning and Engineering

- Planning and Engineering Guide (NN44200-200)
- Network Planning Guide (NN44200-201)
- Converging the Data Network with VoIP Guide (NN43001-260)
- Solution Integration Guide for Communication Server 1000/Call Pilot/Contact Center/Telephony Manager (NN49000-300)

Installation and Configuration

- Upgrade and Platform Migration Guide (NN44200-400)
- High Availability: Installation and Configuration (NN44200-311)
- Installation and Configuration Task List Guide (NN44200-306)
- Quickstart Guide (NN44200-313)
- Installer Roadmap (NN44200-314)
- **Server Installation Guides**
  - 201i Server Hardware Installation Guide (NN44200-301)
  - 202i Server Hardware Installation Guide (NN44200-317)
  - 202i Installer Roadmap (NN44200-319)
  - 703t Server Hardware Installation Guide (NN44200-304)
  - 1002rp Server Hardware Installation Guide (NN44200-300)
  - 1002rp System Evaluation (NN44200-318)
  - 1005r Server Hardware Installation Guide (NN44200-308)
  - 1005r System Evaluation (NN44200-316)
  - 1006r Server Hardware Installation Guide (NN44200-320)
  - 600r Server Hardware Installation Guide (NN44200-307)
  - 600r System Evaluation (NN44200-315)
- **Configuration and Testing Guides**
  - Meridian 1 and CallPilot Server Configuration Guide (NN44200-302)
  - T1/SMDI and CallPilot Server Configuration Guide (NN44200-303)
  - Communication Server 1000 System and CallPilot Server Configuration Guide (NN44200-312)
- **Unified Messaging Software Installation**
  - Desktop Messaging and My CallPilot Installation and Administration Guide (NN44200-305)

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Administration

- Administrator Guide (NN44200-601)
- Software Administration and Maintenance Guide (NN44200-600)
- Meridian Mail to CallPilot Migration Utility Guide (NN44200-502)
- Application Builder Guide (NN44200-102)
- Reporter Guide (NN44200-603)

Maintenance

- Troubleshooting Reference Guide (NN44200-700)
- Preventative Maintenance Guide (NN44200-505)
- **Server Maintenance and Diagnostics**
  - 201i Server Maintenance and Diagnostics Guide (NN44200-705)
  - 202i Server Maintenance and Diagnostics Guide (NN44200-708)
  - 703t Server Maintenance and Diagnostics Guide (NN44200-702)
  - 1002rp Server Maintenance and Diagnostics Guide (NN44200-701)
  - 1005r Server Maintenance and Diagnostics Guide (NN44200-704)
  - 1006r Server Maintenance and Diagnostics Guide (NN44200-709)
  - 600r Server Maintenance and Diagnostics Guide (NN44200-703)
  - Contact Center Manager Communication Server 1000/Meridian 1 & Voice Processing Guide (297-2183-931)

End User Information

- **End User Cards**
  - Unified Messaging Quick Reference Card (NN44200-111)
  - Unified Messaging Wallet Card (NN44200-112)
  - A-Style Command Comparison Card (NN44200-113)
  - S-Style Command Comparison Card (NN44200-114)
  - Menu Interface Quick Reference Card (NN44200-115)
  - Alternate Command Interface Quick Reference Card (NN44200-116)
  - Multimedia Messaging User Guide (NN44200-106)
  - Speech Activated Messaging User Guide (NN44200-107)
  - Desktop Messaging User Guide for Microsoft Outlook (NN44200-103)
  - Desktop Messaging User Guide for Lotus Notes (NN44200-104)
  - Desktop Messaging User Guide for Novell Groupwise (NN44200-105)
  - Desktop Messaging User Guide for Internet Clients (NN44200-108)
  - Desktop Messaging User Guide for My CallPilot (NN44200-109)
  - Voice Forms Transcriber User Guide (NN44200-110)

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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
- online Help topics in HTML format

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

- Click the Help link in the top-right corner to access the Administration Help area.
- Click the grey 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.

CallPilot end-user online Help

The My CallPilot software contains a Useful Information area that provides access to the end-user guides in HTML format. 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 button 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

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Messaging server compatibility

Overview

CallPilot 5.0 Desktop Messaging clients are compatible with the following messaging servers:

- CallPilot 2.5, 3.0, 4.0, and 5.0 (CallPilot Desktop Messaging 5.0 does not support logon to CallPilot 2.02 and earlier servers)
- Business Communications Manager (BCM)
- CallPilot 100
- CallPilot 150
- CallPilot Mini

The availability of some features depends on the messaging server you use. If you have a BCM, CallPilot 100, CallPilot 150, or CallPilot Mini server, see your messaging server documentation to find out if Desktop Messaging supports your specific server release.

Feature availability

The following feature limitations apply when using Desktop Messaging.

Feature	Availability
Voice messaging	CallPilot 2.5, 3.0, 4.0, 5.0
Fax messaging	CallPilot 2.5, 3.0, 4.0, 5.0
Text messaging	CallPilot 2.5, 3.0, 4.0, 5.0
Telephone Record/Playback	CallPilot 2.5, 3.0, 4.0, 5.0
Computer Record/Playback	CallPilot 2.5, 3.0, 4.0, 5.0
Custom Fax Cover Sheets	CallPilot 2.5, 3.0, 4.0, 5.0
Contact Sender (Instant Messaging)	CallPilot 2.5, 3.0, 4.0, 5.0
Contact Sender (Telephone)	CallPilot 2.5, 3.0, 4.0, 5.0
Call Directory	CallPilot 4.0, 5.0
My CallPilot	CallPilot 2.5, 3.0, 4.0, 5.0
Message Forwarding Rule	CallPilot 4.0, 5.0
Request delivery receipts	CallPilot 2.5, 3.0, 4.0, 5.0
Request read receipts	CallPilot 2.5, 3.0, 4.0, 5.0
Change Password	CallPilot 2.5, 3.0, 4.0, 5.0
Trivial password rejection	CallPilot 2.5, 3.0, 4.0, 5.0

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Feature	Availability
New message notification	CallPilot 2.5, 3.0, 4.0, 5.0 - Automatic CallPilot
Local Address Book	CallPilot 2.5, 3.0, 4.0, 5.0
Dynamic Address Book	CallPilot 2.5, 3.0, 4.0, 5.0
View/Use CallPilot distribution lists	CallPilot 2.5, 3.0, 4.0, 5.0
Block forwarding of voice messages to non-CallPilot users	CallPilot 4.0, 5.0 - System Administrator CallPilot 2.5, 3.0 - Desktop client
Force SSL	CallPilot 4.0, 5.0 - System Administrator CallPilot 2.5, 3.0 - Desktop client
Restrict audio device	CallPilot 2.5, 3.0, 4.0, 5.0 - System administrator
Restrict forward/reply message header	CallPilot 4.0, 5.0 - System Administrator
Restrict local/dynamic Address Book	CallPilot 4.0, 5.0 - System Administrator
Restrict Remember password	CallPilot 4.0, 5.0 - System Administrator CallPilot 2.5, 3.0 - Desktop client
Restrict fax custom cover page	CallPilot 4.0, 5.0 - System Administrator
Restrict Lotus Notes Auto Refresh	CallPilot 5.0 - System Administrator CallPilot 2.5, 3.0 and 4.0 - Desktop client
Create Novell GroupWise Sent Items	CallPilot 4.0, 5.0 - System Administrator
Define fax custom cover page folder	CallPilot 4.0, 5.0 - System Administrator CallPilot 2.5, 3.0 - Desktop client
Global Address Book	CallPilot 5.0
Select inbox (CallPilot or default)	CallPilot 5.0 (Outlook users only)
Restrict text messages	CallPilot 5.0 – System Administrator

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Feature	Availability
Check spelling of text messages using Microsoft Word	CallPilot 5.0
Quick access to voice greetings using My CallPilot	CallPilot 5.0
Ping the server on startup	CallPilot 5.0 – System Administrator ***Note:*** For servers earlier than 5.0: you can customize the Desktop Messaging installer to enable or disable the ping command.
Update an existing contact (sender or recipient) using right-click menu	CallPilot 5.0 (Outlook users only)
Mark messages as unread	CallPilot 5.0
Link directly to My CallPilot to configure a Message Forwarding Rule	CallPilot 5.0
Automatic notification of My CallPilot URL change	CallPilot 5.0
Text capability COS	CallPilot 5.0
Enhancements to the Message Waiting Indicator (for example; balloon notification, configuration options)	CallPilot 5.0
WAV-GSM 6.10 support for outgoing messages to non-CallPilot recipients	CallPilot 2.5, 3.0, 4.0, 5.0
MFR WAV-GSM 6.10 support	CallPilot 5.0 (for 1006r, 1005r and 600r only) ***Note:*** CallPilot 5.0 automatically uses WAV GSM 6.10 for all outgoing WAV conversions when using the new CallPilot hardware (600r, 1005r, 1006r).
Block users from receiving composed messages	CallPilot 5.0
User Privacy option (from My CallPilot)	CallPilot 5.0
MFR Notification (from telephone, desktop, and My CallPilot)	CallPilot 5.0
MFR Delete Option (from My CallPilot)	CallPilot 5.0
MFR telephone prompts	CallPilot 5.0

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Feature	Availability
Password change service	CallPilot 5.0
Mailbox sort order and entry message	CallPilot 5.0
Delete unread messages	CallPilot 5.0
Multiple remote notification targets	CallPilot 5.0

Voice format

Messaging servers use different voice formats.

Voice format	Messaging server
VBK	CallPilot 2.0, 2.5, 3.0, 4.0, and 5.0
G723.1	CallPilot 100, CallPilot 150, and CallPilot Mini
G711	Business Communications Manager

The VBK header contains the data type (VBK, G723.1, or G711), data length (in milliseconds), and proprietary information required to play the data through the telephone.

A default recording type (VBK, G723.1, or G711) is stored with each IMAP server entry configured in the CallPilot Player. When the user logs on to an IMAP server, the server returns the correct recording type to Desktop Messaging. Windows users can save voice messages in either VBK or WAV format, regardless of the server from which the file originates.

In My CallPilot, Microsoft Outlook, Lotus Notes, and Novell GroupWise, messages can be converted from VBK to WAV format before they are sent to non-CallPilot recipients. My CallPilot converts messages to WAV-PCM format. Microsoft Outlook, Lotus Notes, and Novell GroupWise convert messages to WAV-GSM 6.10 format.

Desktop Messaging and My CallPilot preinstallation checklist

To help you prepare for installation, complete the checklist server settings for Desktop Messaging, 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

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☐	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

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

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

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☐	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.

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Chapter 3
Configuring the CallPilot server

This chapter contains the following topics:

"Defining the CallPilot server FQDN" (page 23)

"Configuring messaging services" (page 25)

"Defining addressing prefixes" (page 29)

"Controlling access to features" (page 31)

Defining the CallPilot server FQDN

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

To define the CallPilot server FQDN, perform three main steps:

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.

Determining the CallPilot server FQDN

Step	Action
1	Verify with your IS administrator what the CallPilot server FQDN is.
2	On the CallPilot server, click **Start**. **Result:** The Start menu appears.

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3 Click **Settings**.

Result: The Settings menu appears.

4 Click **Control Panel**.

Result: The Control Panel appears.

5 Double-click **System**.

Result: The System dialog box appears.

6 Click **Computer Name**.

Result: The computer name appears.

7 Click **Change**.

Result: The computer name change dialog box appears.

8 Click **More**.

Result: The primary DNS suffix appears. 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.

9 Click **Cancel**.

—End—

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, see the CallPilot Manager online Help.

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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.

To define the CallPilot server FQDN in CallPilot Manager

When 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.

Step	Action
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 window appears.
3	In the **SMTP/VPIM** section, type the CallPilot server FQDN. **Example:** cpserver.mycompany.com
4	Click **Save**.

—End—

Configuring messaging services

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 "Desktop Messaging and My CallPilot preinstallation checklist" (page 19) 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) lets Desktop Messaging and My CallPilot clients log on to CallPilot and retrieve messages. In My CallPilot, the IMAP server also uses by e-mail-by-phone and mailbox links.

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- **LDAP server**—Lightweight Directory Access Protocol (LDAP) lets Desktop Messaging and My CallPilot clients access the CallPilot Address Book. You can use the CallPilot LDAP server or your existing LDAP server. The My CallPilot mailbox links also use the LDAP server.
- **SMTP server**—Simple Mail Transfer Protocol (SMTP) lets Desktop Messaging and My CallPilot clients send messages.

If a security problem exists, 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 and My CallPilot. Alteration of server settings can also interrupt service for Desktop Messaging users.

Security options

The CallPilot server supports the following authentication methods:

- **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).
- **Plain Password authentication**--An authentication method that uses the mailbox number and password, transmitted in clear text (unencrypted) over the network.

The Desktop client and My CallPilot support SSL and plain text, but they do not support Kerberos.

To Require SSL on the server

Step	Action
1	On the CallPilot server, in CallPilot Manager, browse to **Messaging > Message Delivery Configuration**.
2	In the SMTP/VPIM section, click on **Security modes for SMTP Sessions**.
3	Select the **Enable SSL for incoming SMTP sessions**.
4	On the client server, select **Tools > E-mail Accounts > CallPilot Desktop**.
5	Click **Change**.
6	Select the **Mail** tab and click **Advanced**.

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Default ports:

- Non-SSL: IMAP=143, SMTP=25
- SSL: IMAP=993, SMTP=465

7 Enter appropriate information and select the corresponding check boxes.

8 Click **OK**.

—End—

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, see the CallPilot Manager online Help. For details about security options supported by specific e-mail clients, see the e-mail client 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.

To configure IMAP and LDAP settings in CallPilot Manager

Step	Action
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 required.

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3 To set up the LDAP search base:

a. From the CallPilot Manager homepage, select **Configuration Wizard**.

b. Click **Next** on the Welcome page.

c. Select the **CallPilot Individual Feature Configuration (Express Mode) radio** button. Click **Next**.

d. Select the **Server Information** check box. Select **Next**.

e. Scroll to the LDAP search base and enter the search base.

For example dc=nortel,dc=ca
(Note: Do not add a space after the comma.)

f. Continue to click **Next** until the Configuration Wizard reaches the last page.

g. Click **Finish**.

4 In the **IMAP** section, check the **Enable IMAP with Plain Password Authentication** box to turn on the 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, see 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.

—End—

To set SMTP options in CallPilot Manager

Step	Action
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**

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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**.

—End—

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.

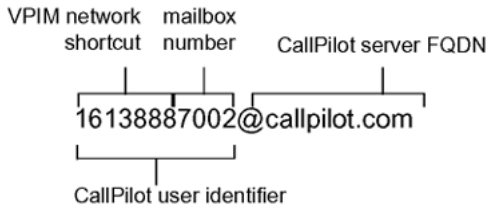
Open VPIM shortcut

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.



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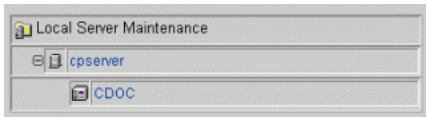
In a Network Message Service (NMS) system, the VPIM network shortcut lets two different NMS sites to have the same mailbox number.

	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 lets users receive messages from other VPIM-compliant voice messaging systems.

To add a VPIM network shortcut

Step	Action
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 a VPIM network shortcut for each local and remote prime switch location, as well as all satellite switch locations.

—End—

Note: If your messaging network is configured with Electronic Switched Network (ESN), Coordinated Dialing Plan (CDP), or a hybrid dialing plan

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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.

Controlling access to features

Overview of feature access options

To provide users with access to Desktop Messaging and My CallPilot features, mailbox classes and Restriction Permission Lists (RPL) must be set up correctly.

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 with 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, CallPilot applies both the Desktop Messaging RPL and the Delivery to Telephone RPL.

Controlling access to Desktop Messaging and My CallPilot features

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

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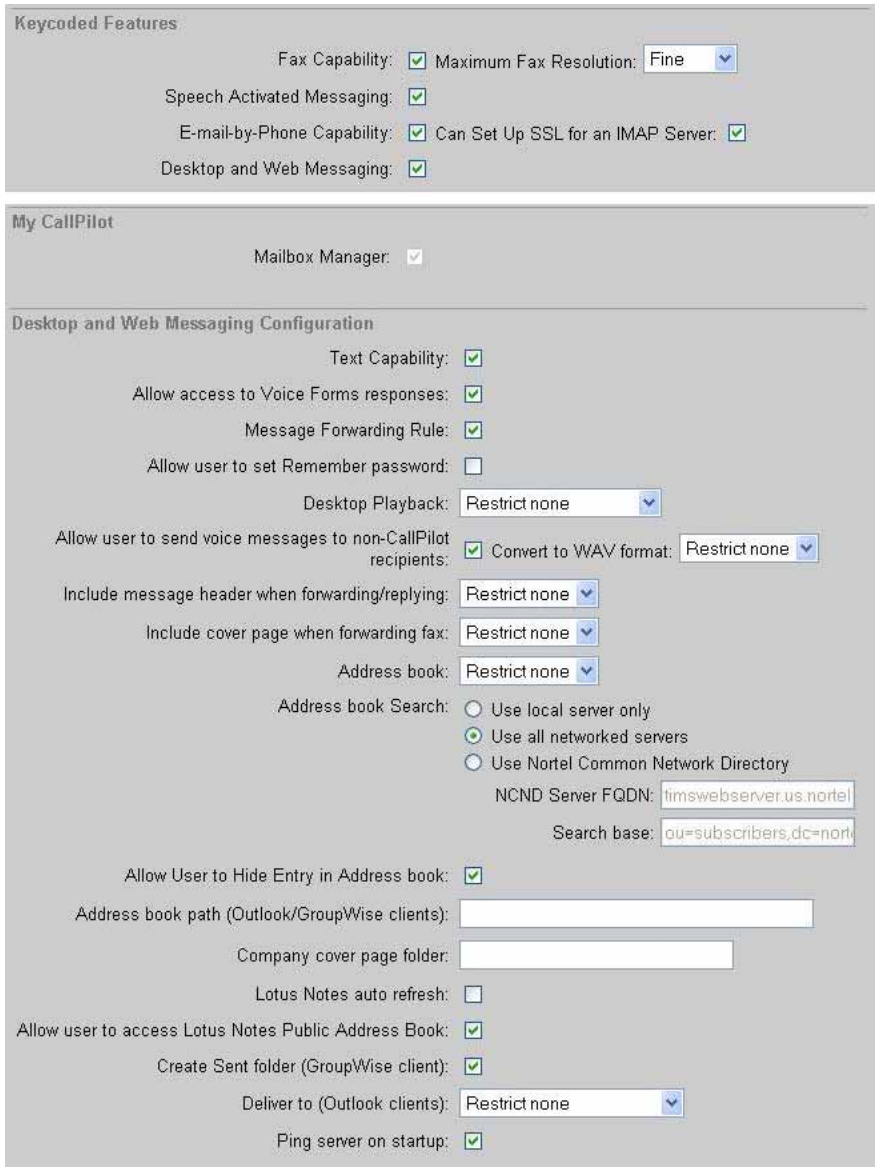
To set Desktop Messaging privileges

Step	Action
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.



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Note 1: 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 2: When retrieving a message with an attachment via the telephone interface, regardless of whether it is a fax or text message, CallPilot will notify 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**.

—End—

Centralized Control of Desktop Messaging features

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 log on again to enable changes.

CallPilot 5.0 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 was not enabled.

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To view IMAP and SMTP check boxes for Outlook Express

Step	Action
1	Select **Tools** > **Accounts**. *The Internet Accounts window appears.*
2	Select the proper account and click **Properties**. *The properties window appears.*
3	Select the **Advanced** tab. a. Modify the SMTP port number and select SSL, if required. b. Modify the IMAP port number and select SSL, if required.

—End—

To view IMAP and SMTP check boxes for Microsoft Outlook

Step	Action
1	Select **Tools** > **Options**. *The Options window appears.*
2	Select the **Mail Setup** tab.
3	Click **E-mail accounts**.
4	Under the e-mail heading, select **View or Change existing e-mail accounts** and click **Next**.

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The e-mail accounts appear.

5 Select the e-mail account and click **Change**.

The CallPilot Desktop Messaging Configuration window appears.

6 Select the **Mail** tab and click **Advanced**.

a. Modify the SMTP port number and select SSL, if required.

b. Modify the IMAP port number and select SSL, if required.

7 Click **OK**.

8 Click **OK** in the configuration window.

9 Click **Finish**.

10 Click **OK**.

—End—

To view LDAP check box in Outlook Express

Step	Action
1	Select **Tools** > **Accounts**.
2	Select the Internet account and click **Properties**.

—End—

To view LDAP check box in Microsoft Outlook

Step	Action
1	Select **Tools** > **Options**. *The Options window appears.*
2	Select the **Mail Setup** tab.
3	Select **E-mail accounts**. *The E-mail accounts window appears.*
4	Under the E-mail heading, select **View or change existing e-mail accounts** and click **Next**. *The e-mail accounts appear.*

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5 Select the CallPilot e-mail account and click **Change**.

The CallPilot Desktop Messaging Configuration window appears.

6 Select the **Address Book** tab.

7 In the path field, enter the Address Book location.

8 In the LDAP search base field, enter the search string. For example, dc=nortel,dc=ca.

9 Select **Notify me of LDAP search base changes**.

10 Select either **Search server Address Book**, or **Download server Address Book to the local Address Book**.

11 Select **Advanced**.

The Address Book—Advanced window appears.

12 Enter the **CallPilot server name** in the server field.

13 Enter your VPIM network number with your mailbox number in the account field. For example, 15064725, where 1506=VPIM and 4725=mailbox number.

14 Enter the **port number** in the LDAP port field.

15 Select **SSL** if required.

16 Click **OK**.

17 Click **OK** on the CallPilot Desktop Messaging configuration window.

18 Click **Finish**.

19 Click **OK**.

—End—

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

- When the box is cleared the user cannot check Remember Password option when logging on to the CallPilot server. If the password was previously stored in the registry, it is removed.

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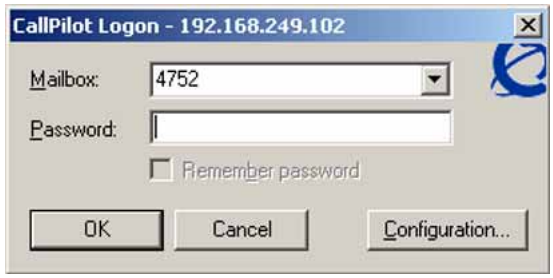
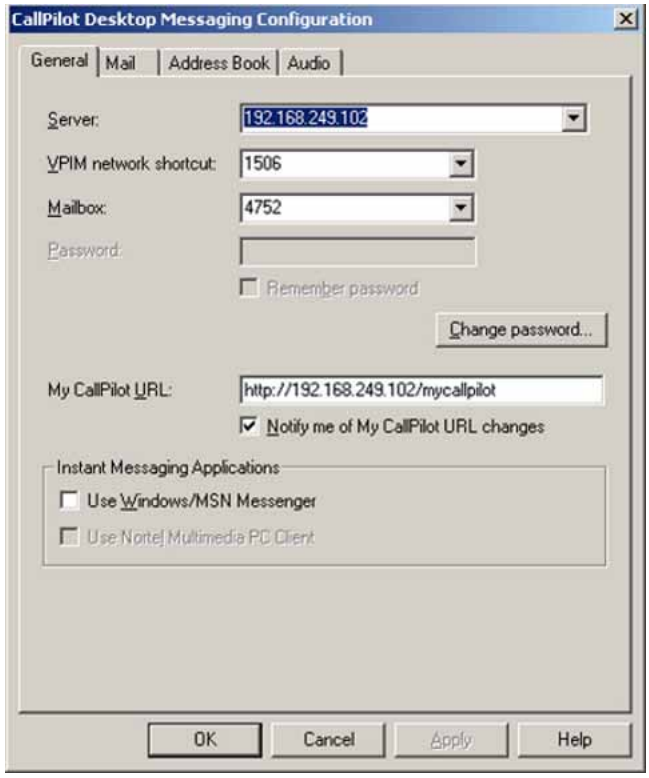


Allow user to send Voice Messages to non-CallPilot recipients

- When the box is cleared, the user cannot 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



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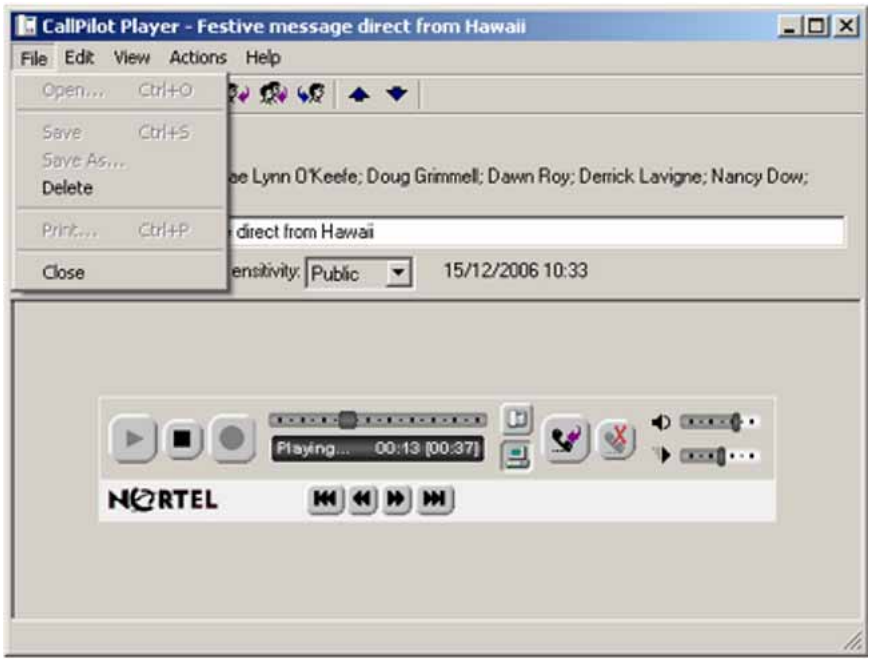

Convert to WAV format

- If convert to WAV is set to Never, the option Convert voice message to WAV is cleared 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 can modify the Convert voice messages to WAV for non-CallPilot recipients option.

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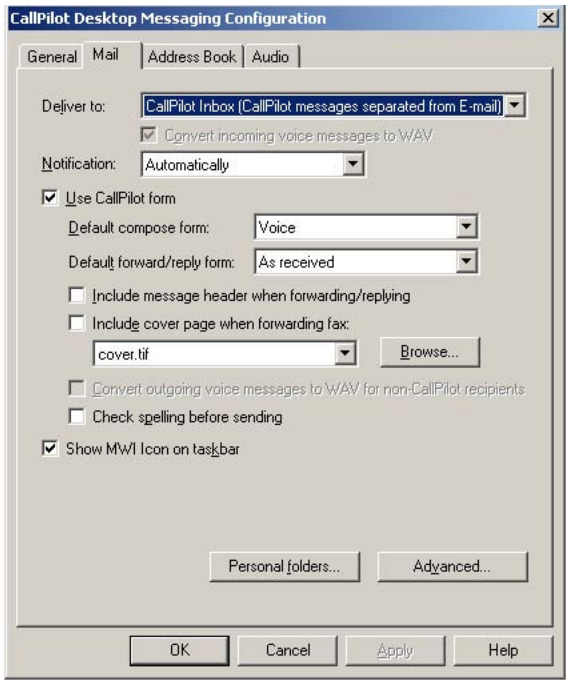

Include Message Header when forwarding/replying

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

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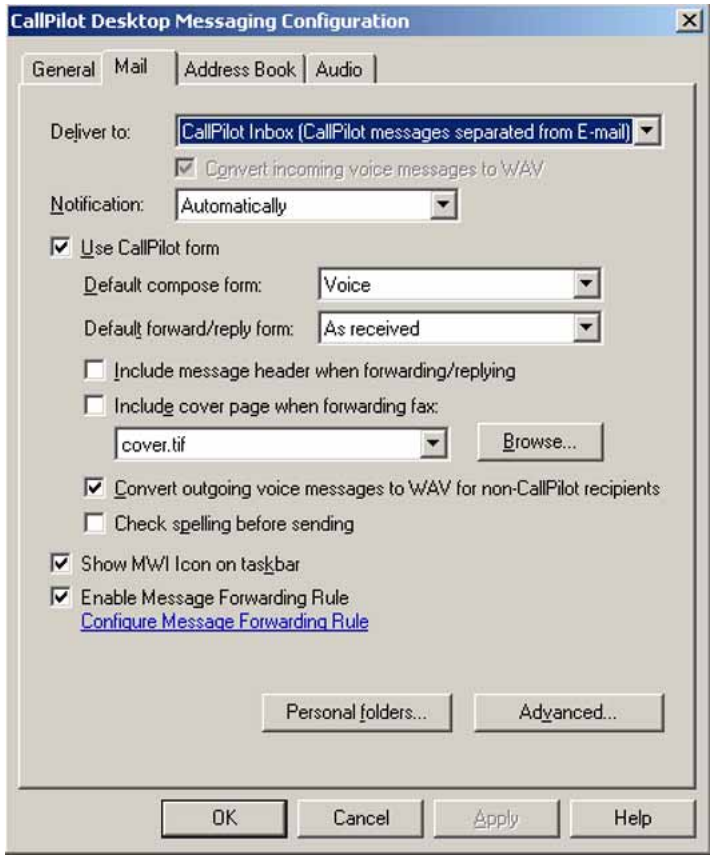

Include Cover Page when Forwarding Fax

- If Include cover page when forwarding fax is set to Never, the Desktop client configuration option Include cover page when forwarding fax, is cleared and grayed out.
- If Include cover page when forwarding fax is set to Restriction none, user can 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 can choose the desired Address Book. The default value is the Local Address Book.

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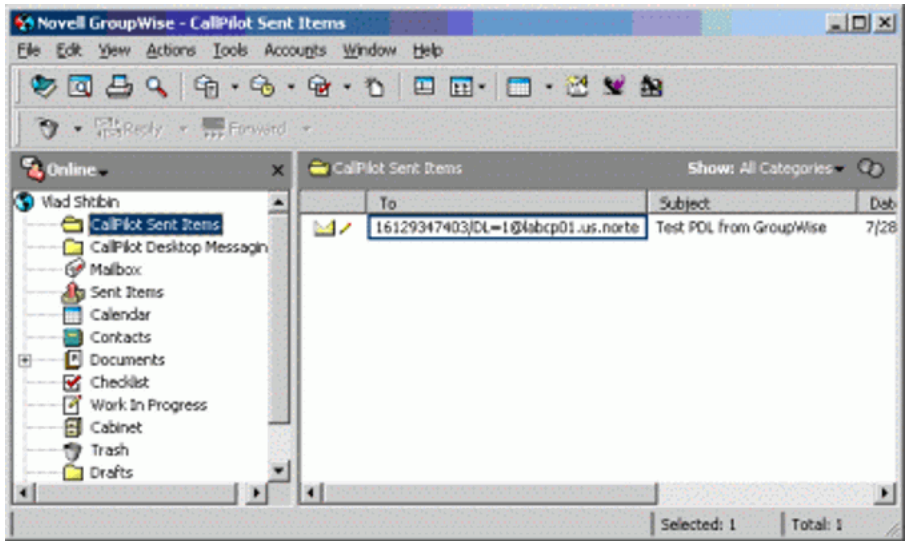
- The Address Book path for Outlook and GroupWise, if not empty, is set to the common location for Address Book.

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 can vary depending on where the cover page folder path points. The default setting is an empty string.

Create Sent Folder (GroupWise)

- If the create sent folder check box is checked, the CallPilot Sent Items folder is created in the GroupWise mail database, and the option to Create Sent Item is available to the users.



- If the create sent folder check box is cleared, 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 the default My CallPilot tab.

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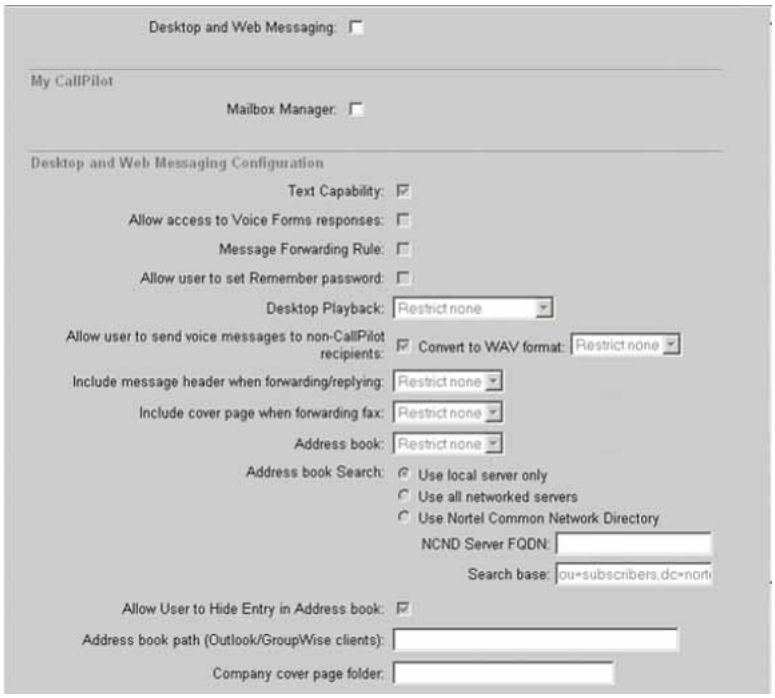
This level of access is appropriate for mailbox owners who usually access their CallPilot mailbox by telephone, and who do not require Desktop Messaging, Web messaging, or telephone access to e-mail (e-mail-by-phone).



Mailbox management only Because 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.

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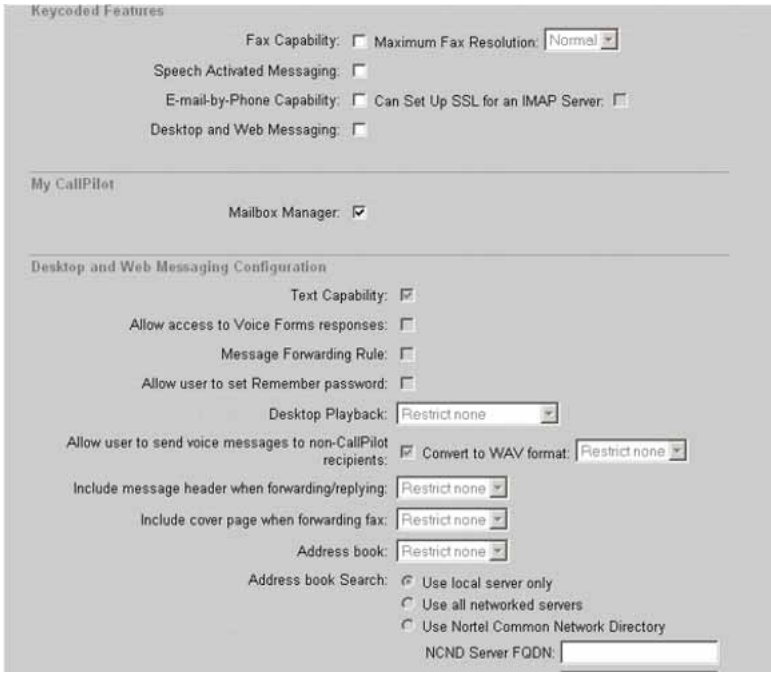
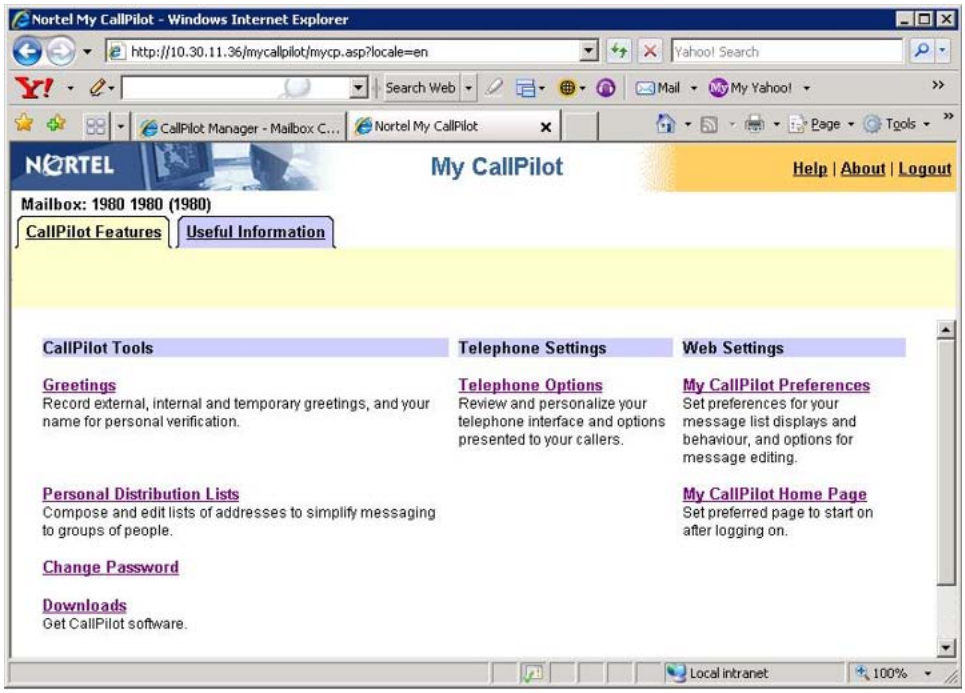
Configuration of features, such as remote notification and personal distribution lists, is simple and accessible from any location with Internet access.





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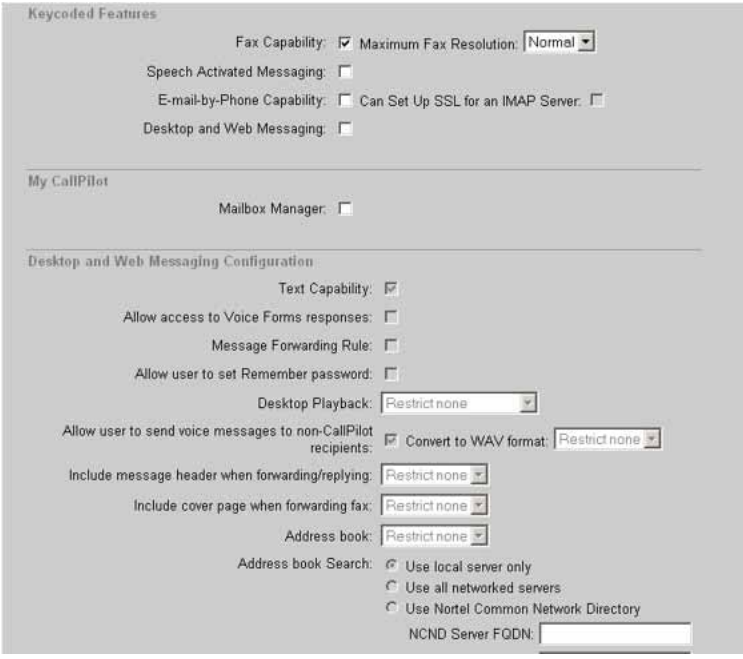
Keycoded features enabled without additional mailbox management When you enable keycoded features, the associated configuration options appear in My CallPilot. My CallPilot provides configuration options for:

- 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.



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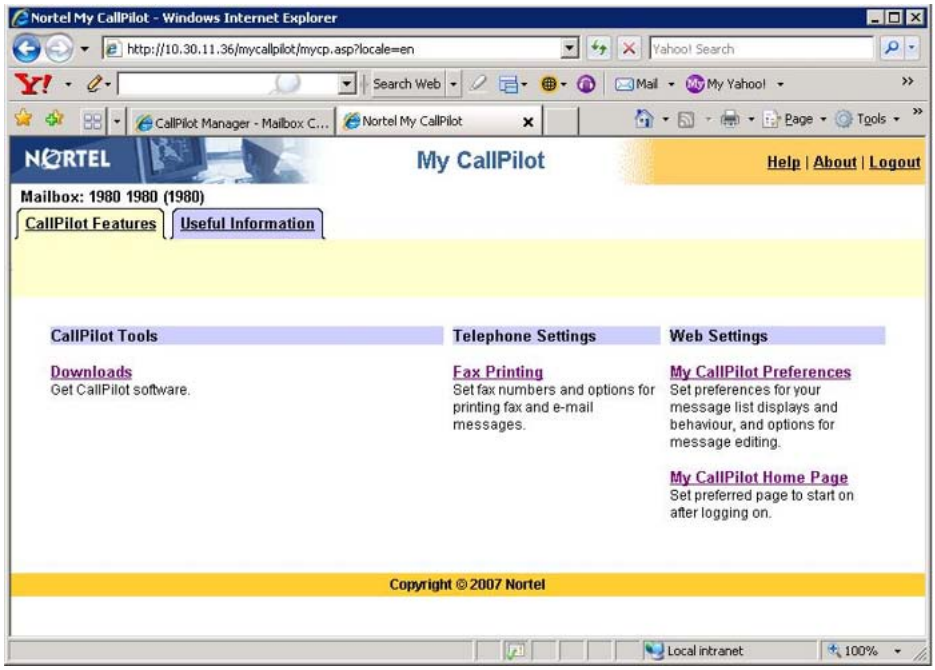

Keycoded features enabled with mailbox management When you enable keycoded features for a mailbox class, you can also enable Mailbox Manager to provide access to mailbox management features.

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.

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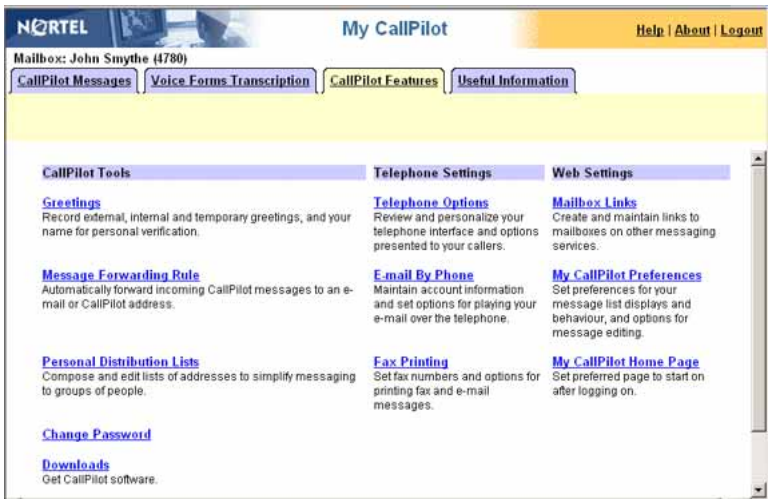

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Chapter 4
Creating a customized installer

As a system administrator, you can use the setup.exe file to generate a customized installer.

Creating a customized installer is optional. If you do not want to create a customized installer, proceed to Chapter 6 "Configuring Desktop Messaging" (page 79).

When you create a customized installer using the setup.exe file, it presents you with a series of wizard screens where you can preconfigure the options and features that you want CallPilot Desktop Messaging to install. Later, when you run the customized installer on individual computers, only those options and features you selected are installed.

You create a customized installer by running setup.exe with the /A option, as described in the following procedure.

To create a customized installer

Step	Action
1	From the **Start** menu, click **Run**.
2	Click **Browse** and navigate to the Desktop Messaging Installation CD.
3	Select **setup.exe** and click **Open**.
4	Append **/A** to the resulting command line (setup.exe /A).
5	Click **OK**. *The Welcome window appears.*

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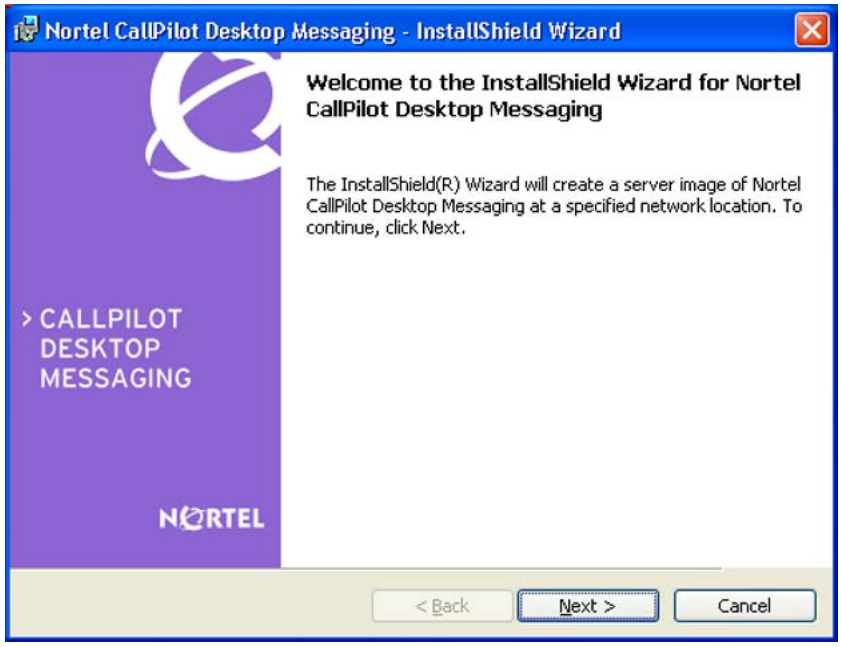
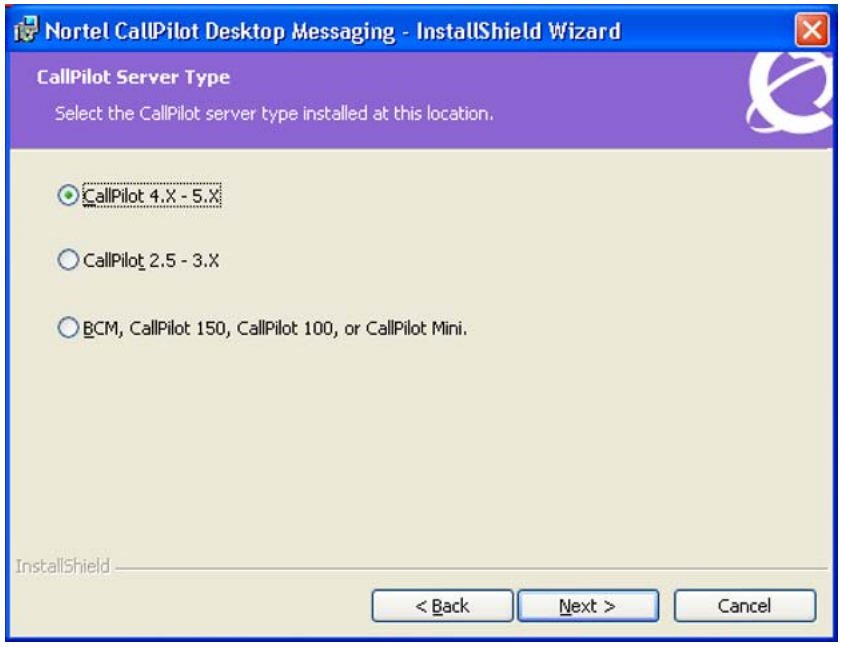


6 Click **Next**.

The CallPilot Server Type window appears.



7 Select the type of CallPilot server the desktop clients connect to, and then click **Next**.

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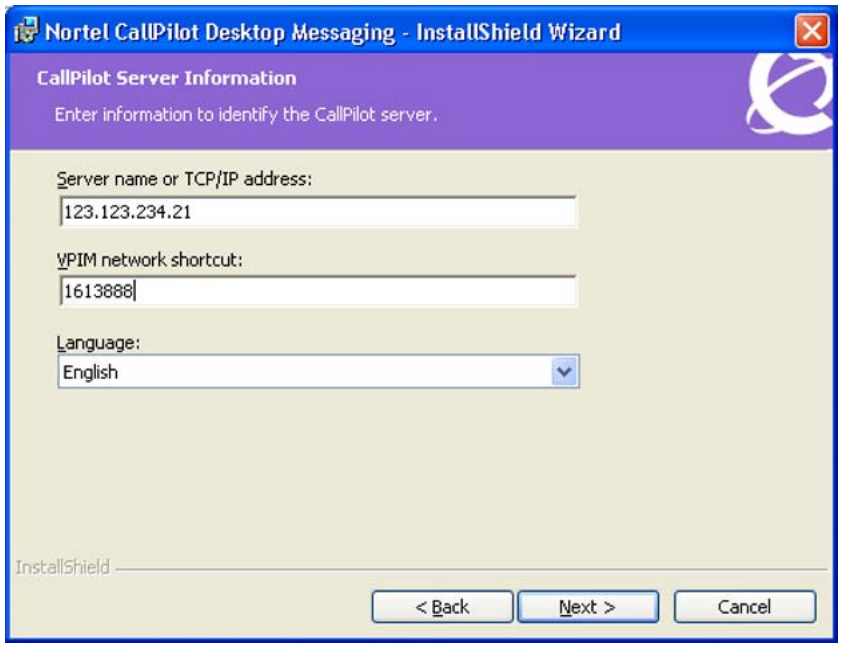
The CallPilot Server Information window appears.



8 Enter the CallPilot server FQDN or TCP/IP address and VPIM network shortcut defined by the Desktop Messaging and My CallPilot preinstallation checklist, and then click **Next**.

The first of a series of customization pages appears. These pages ask you to select which Desktop Messaging client to include in the customized installer: Microsoft Outlook, Novell GroupWise, Lotus Notes, or Internet mail clients.

> ***Note:*** If your site uses more than one type of e-mail client (for example, Microsoft Outlook and Lotus Notes), you can include multiple types in the customized installer. During installation on each client workstation, it installs only the Desktop Messaging client that it detects.

9 Choose whether to install Desktop Messaging for Outlook, and then click **Next**.

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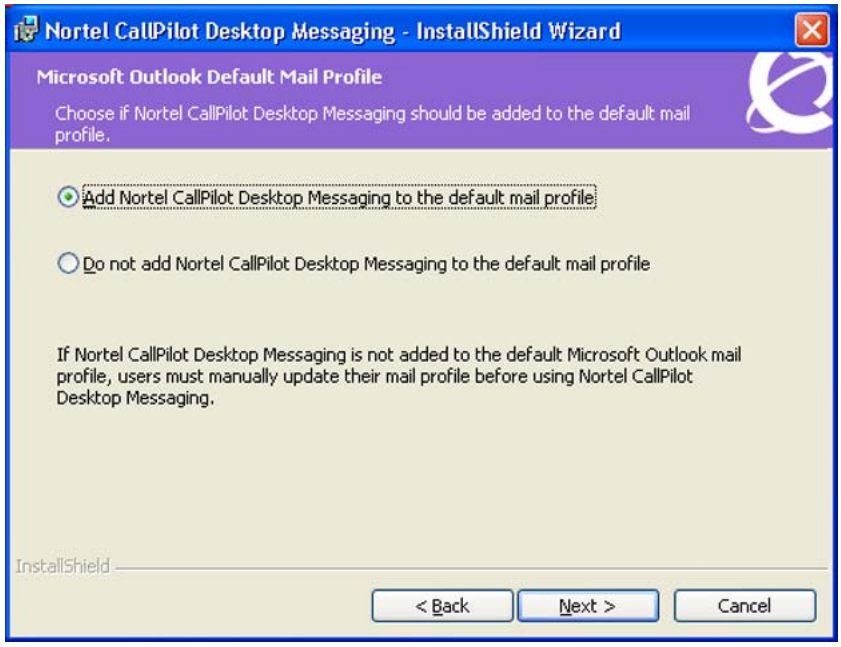
If you chose to install Nortel CallPilot Desktop Messaging for Outlook, the Microsoft Outlook Default Mail Profile window appears. Make your selection and then click Next.



10 Chose whether to install Desktop Messaging for GroupWise and then click **Next**.

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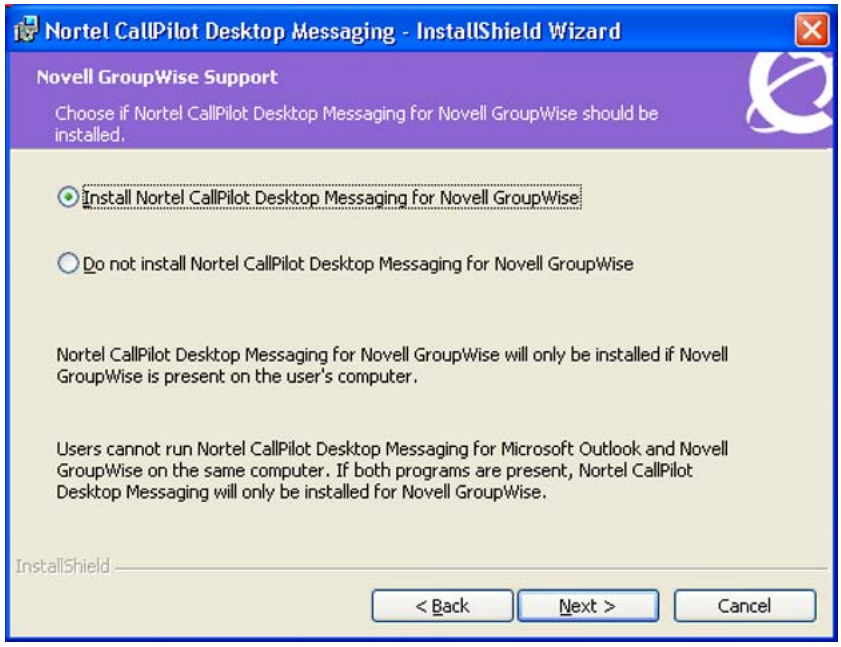
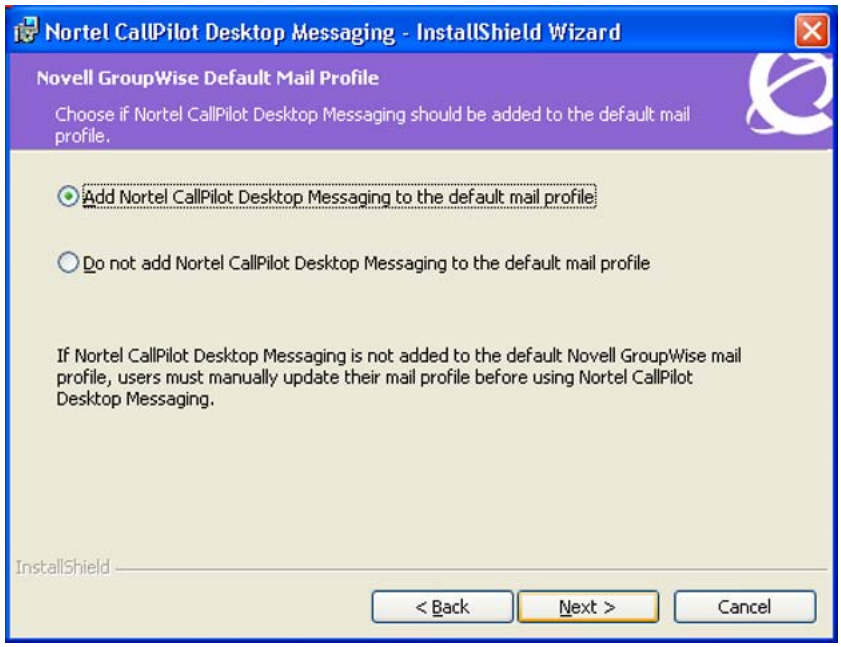


If you chose to install the Nortel CallPilot Desktop Messaging Novell GroupWise client, the Novell GroupWise Default Mail Profile page appears. Make your selection and then click Next.



11 Choose whether to install Desktop Messaging for Lotus Notes, and then click **Next**.

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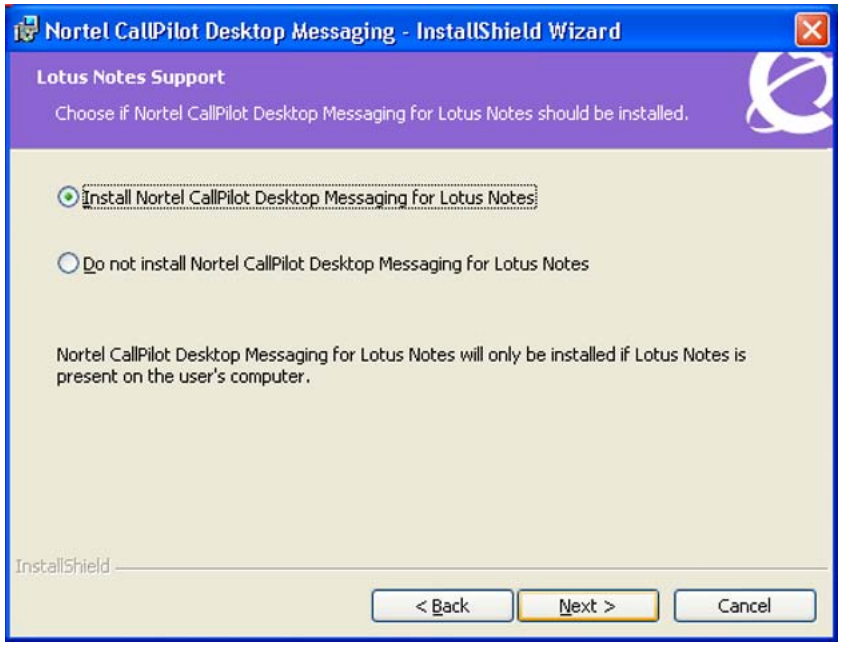
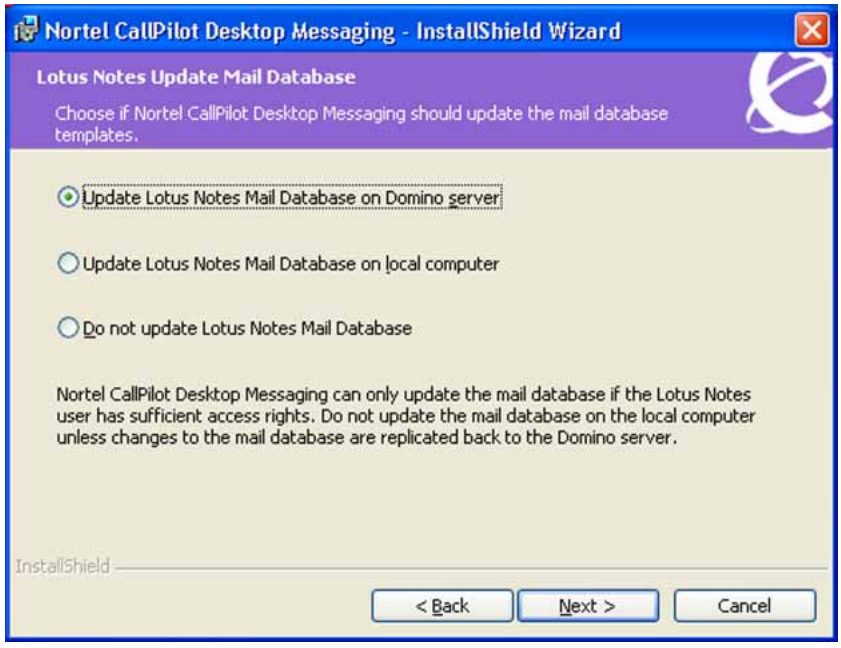


12 If you chose to install Nortel CallPilot Desktop Messaging for Lotus Notes client, the Lotus Notes Update Mail Database page appears.



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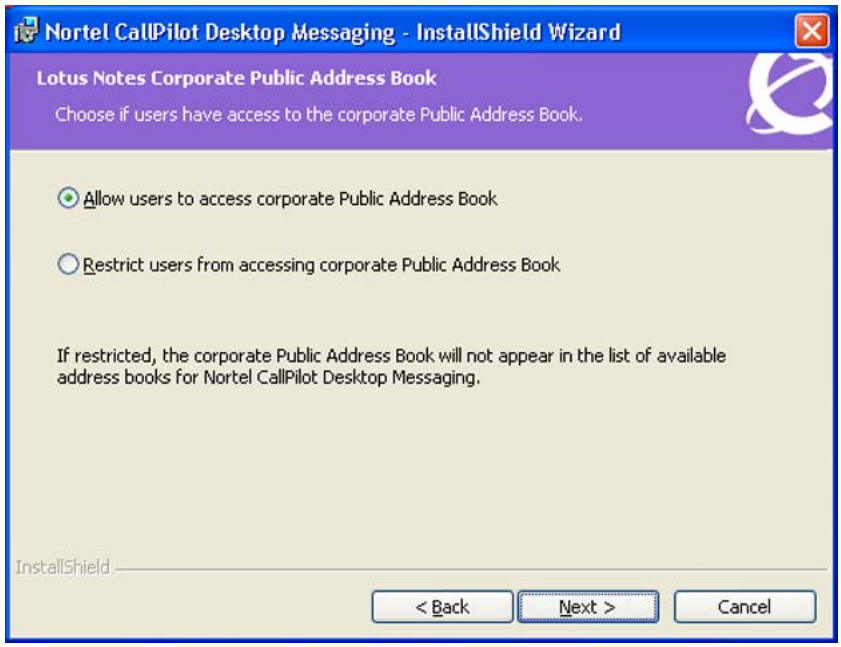
Choose one of the following:

- **Update Lotus Notes Mail Database on Domino server:** Use this option if the user's mail database is on the Domino server and the user has rights to modify the mail database design.
- **Update Lotus Notes Mail Database on local computer:** Use this option if the user's mail database is on the user's local computer.
- **Do not update Lotus Notes Mail Database:** Use this option if:
  - — the user's mail database is on the Domino server and the user does not have rights to modify the mail database design, or
  - — the Domino administrator updates the user's mail database design

Click **Next**.

13 Chose whether to allow the users to access the corporate Public Address Book and then click **Next**.



14 Choose whether to install the Nortel CallPilot Desktop Messaging for Internet Mail, and then click **Next**.

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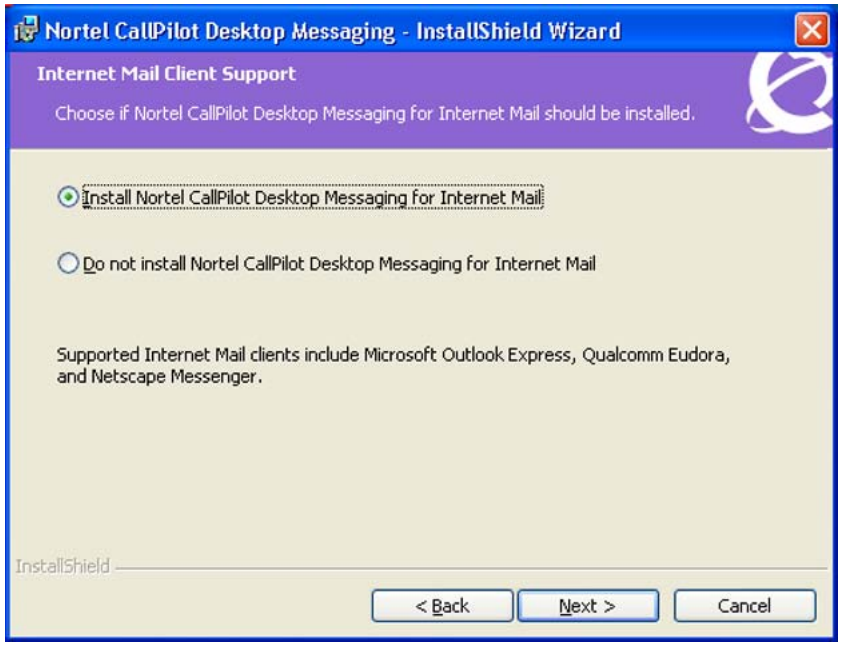
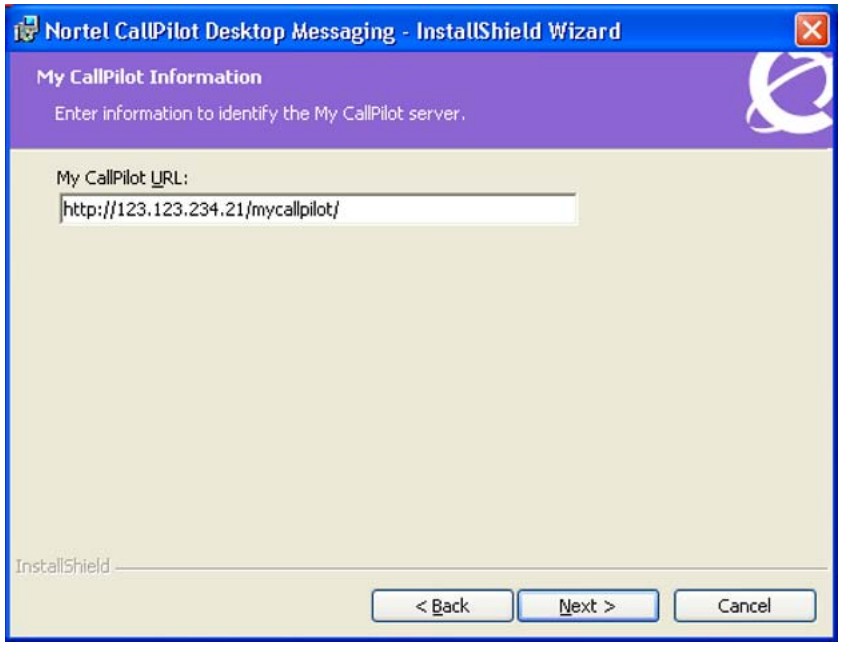


15 Enter the My CallPilot URL defined by the Desktop Messaging and My CallPilot preinstallation checklist, and then click **Next**.

Note: For CallPilot 5.0 servers, the My CallPilot URL you configure in the My CallPilot configuration page of CallPilot Manager overwrites this one. Nortel recommends you configure it in CallPilot Manager instead of here.



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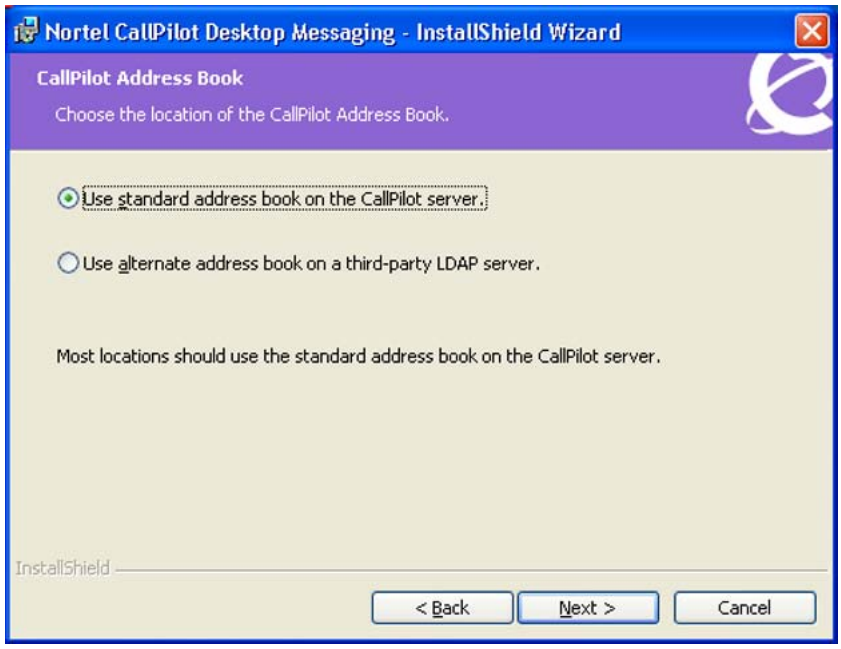
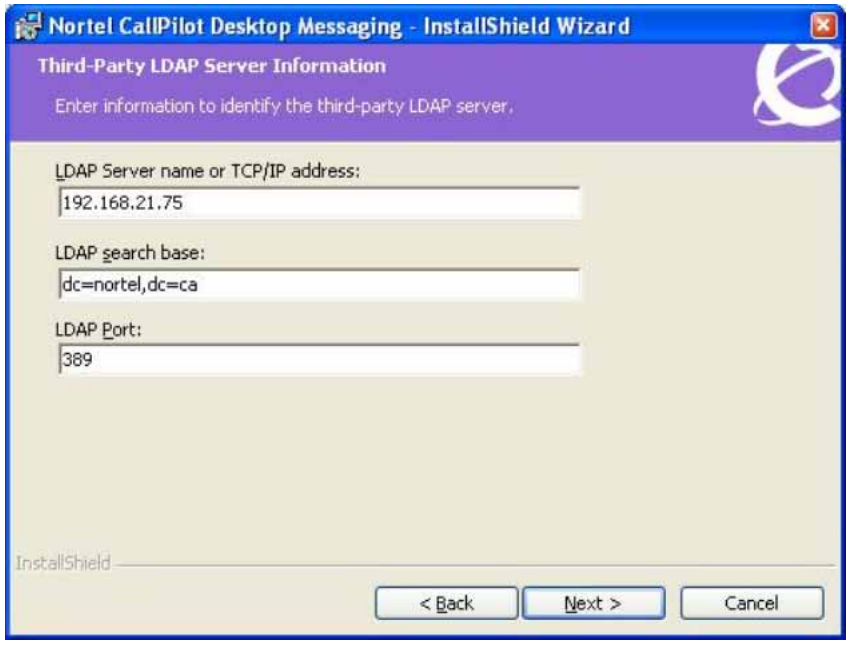
16 Choose the location for the CallPilot Address Book, and then click **Next**.



If you choose "Use alternate address book on a third-party LDAP server" the Third-Party LDAP Server Information page appears.



All parameters of the third-party LDAP server should be filled in.

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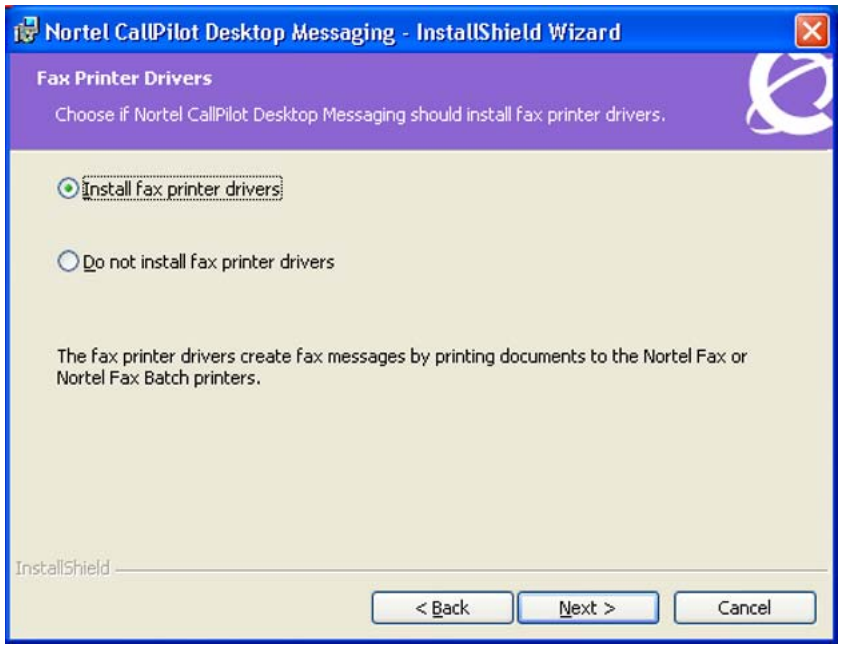
If you choose "Use standard address book on the CallPilot server" all LDAP settings will be auto-initialized during the first successful logon into DM.

17 Choose whether to install the fax printer drivers, and then click **Nortel CallPilot Desktop Messaging - InstallShield Wizard**.



18 Type the name of the account and its password, and then click **Nortel CallPilot Desktop Messaging - InstallShield Wizard**.

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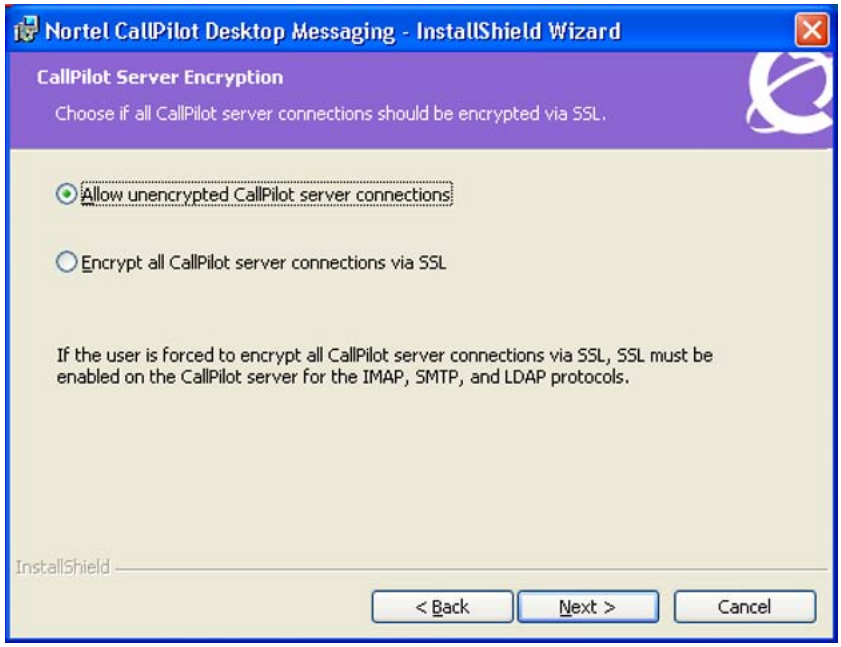
19 If your CallPilot server is encrypted to require SSL, choose the second option. If not choose the first. Then click **Next**.



20 Choose whether to ping server on start up, and then click **Next**.

Note: For CallPilot 5.0 servers, the Ping-server-on-startup option you configure in the Mailbox settings of CallPilot Manager overwrites this one. Nortel recommends you configure it in CallPilot Manager instead of here.

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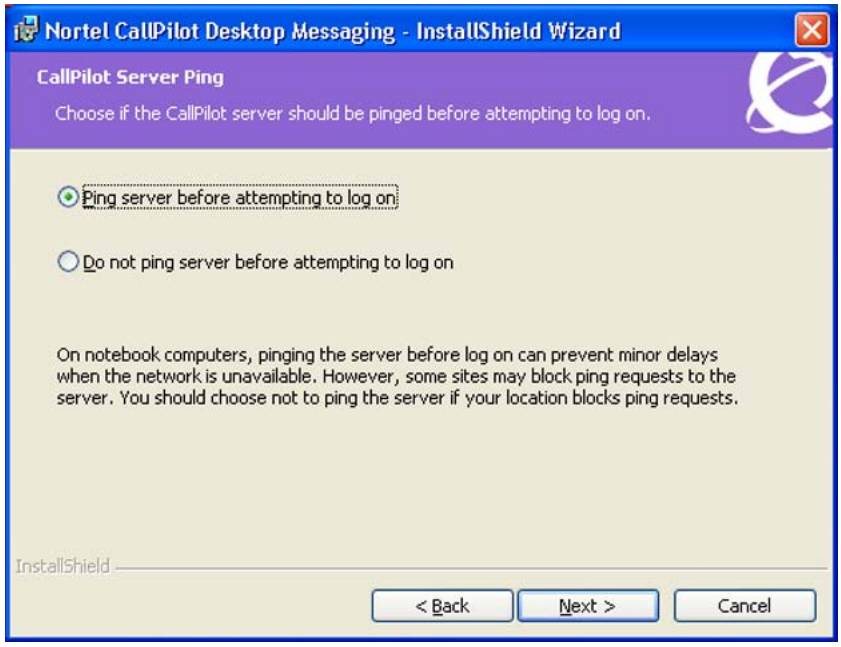

Choose whether to turn on MWI autorun, and then click Next.

21 Type, or browse to, the location that you want the setup.msi (customized installer) file saved, and then click **Install**.

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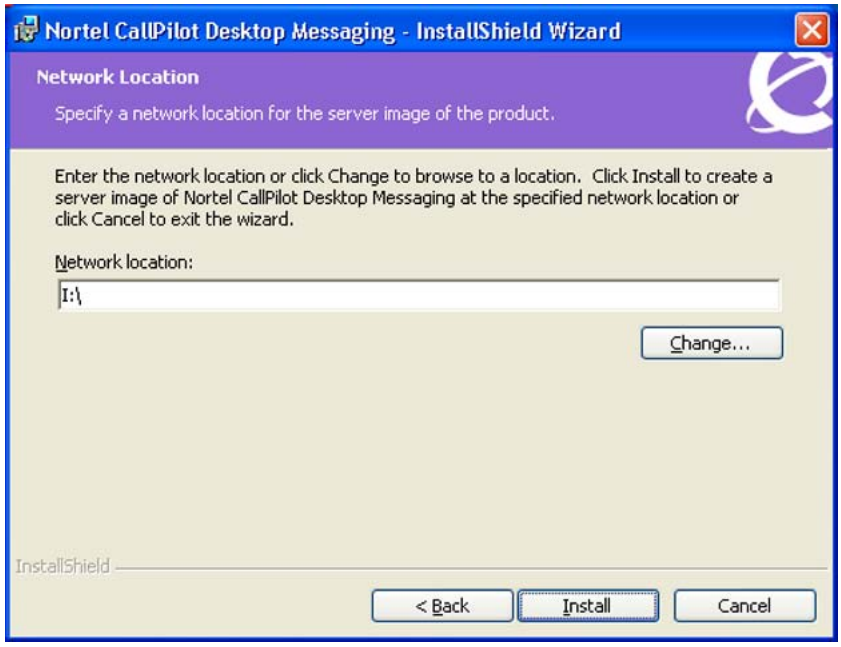

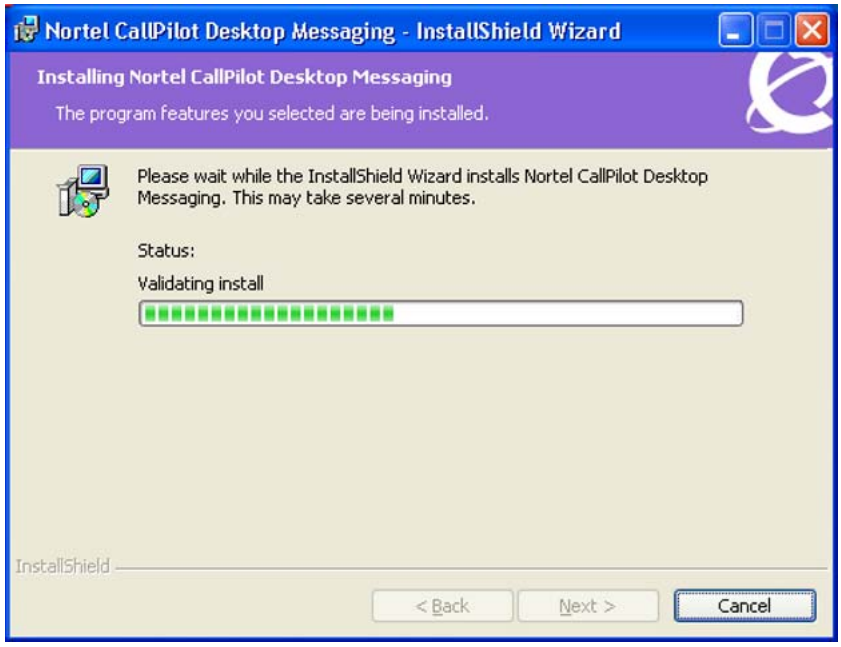

22 When the generation process is complete, the InstallShield Wizard Completed window appears. Click **Finish**.

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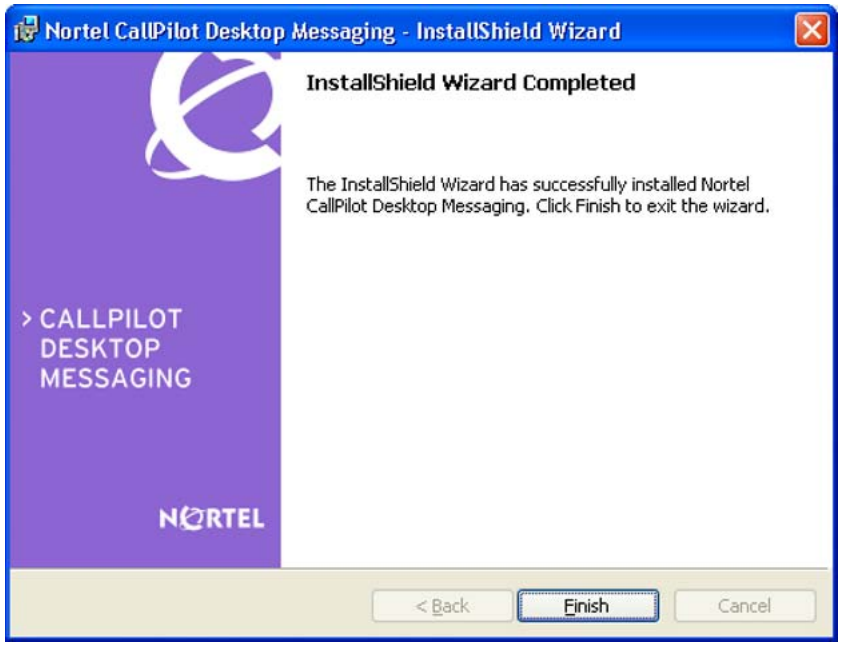

—End—

Using the setup.ini file for customized installations

When you install CallPilot 5.0 upgrades, you can reuse the setup.ini file from your original customized installation. This file automatically customizes the upgrade and saves you from having to regenerate a customized installation using the setup.exe /A command.

To use an existing setup.ini file to customize an upgrade

Step	Action
1	Copy the setup.ini file from the original customized installation to the folder containing the setup.exe file for the upgrade.
2	Double-click the setup.exe file. *The upgrade installs with the settings from the setup.ini file.*

—End—

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To change the name of the setup.ini file

You can change the default file name when multiple CallPilot servers are installed on the same LAN. You can then use a single shared installation with unique .ini files for each server.

Step	Action
1	From the **Start** menu, click **Run**, and then type **setup.exe /A /VINI="<file_name>"** where file_name is the name of the new .ini file.
2	Enter the required information specific to the server.
3	Copy the newly created file to your root drive prior to updating CallPilot Desktop Messaging on your computer.

—End—

Note: If you install a new e-mail client after you install CallPilot 5.0, you must install CallPilot software for the new e-mail client to access your CallPilot messages.

When reusing the setup.ini file only those parameters can be changed which were initialized during the creation of the customized installer. All other parameters which were not initialized will be ignored.

Customizing Lotus Notes templates

If you need to create customized Lotus Notes template files, first customize the entire installation by running setup.exe /A.

During installation, the Lotus Notes templates are copied to your computer (program files\Nortel\CallPilot\notes).

Modify the Lotus Notes templates (cpmailXX.ntf or cpperabXX.ntf). Replace the original Lotus Notes templates with the modified templates.

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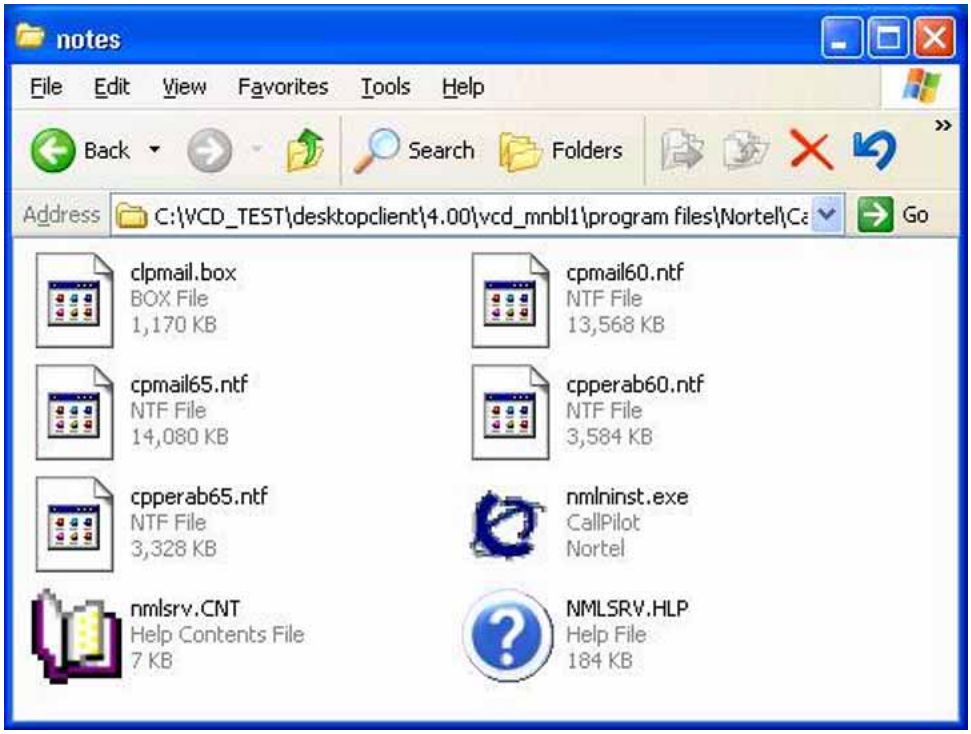

After you modify and save the templates, run setup.msi.

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Chapter 5
Installing Desktop Messaging

Desktop Messaging requirements

Servers

You must install CallPilot with a keycode that enables Desktop Messaging features. CallPilot Desktop Messaging 5.0 supports CallPilot 2.5, 3.0, 4.0, and 5.0 servers. CallPilot Desktop Messaging 5.0 does not support logon to CallPilot 2.02 and earlier servers.

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 needs
- cause the introduction of e-mail distributed viruses to the server

ATTENTION
Selected language must be the same when installing Desktop Messaging and e-mail clients. For example, you cannot select English for Language in Desktop Messaging and French for Language with an e-mail client.

Server configuration

Before you install Desktop Messaging, ensure that you configure the CallPilot server properly. For details, see Chapter 3 "Configuring the CallPilot server" (page 23).

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Workstation requirements

CAUTION
Use of Passwords

- Installation fails if you do not have the rights to install software or modify the registry.
- An administrator's account and password can be required to install the fax and fax batch printers.

Desktop Messaging requires the following software and hardware.

Windows systems:

- Windows 2000 Professional, Windows XP Professional, or Windows Vista
- Monitor with 256-color 800 x 600 capability
- 15 MB 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

  You can access CallPilot messages on the network using ISDN, ADSL, or a dial-up modem.

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

- PowerPC 603, 604, G3 or compatible processor
- Apple Macintosh OS 10

  Note: Macintosh OS 9.0 and 9.1 are not supported. Partial support for Macintosh OS X is available with My CallPilot. The CallPilot player and the fax drivers do not support OS X.

- TCP/IP network connection of at least 56 KB/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. You can use a PlainTalk microphone.

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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. For the most up-to-date list of supported clients, see the CallPilot 5.0 *Distributor Technical References bulletin*.

Groupware clients (including Citrix)	Internet clients (including Citrix)
• Microsoft Outlook 2002 (XP), 2003 and 2007 • Novell GroupWise 6.5 and 7.0 • Lotus Notes 6.0, 6.5 and 7.0	• Microsoft Outlook Express 6.0, Outlook 2002 (XP), 2003 and 2007 in Internet mail mode, Vista Windows Mail • Citrix MetaFrame XP on Windows 2000 servers and Windows 2003 servers • Citrix MetaFrame Presentation Server 3.0 and 4.0 on Windows 2003 servers

Nortel recommends that you install the latest service release (SR) updates 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 see 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. Nortel recommends that you 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 access control level (ACL) of the user's mail database. The Domino server administrator sets this control on the Domino server.
- **Fax messaging**--Microsoft Windows Imaging is no longer used. 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.

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My CallPilot and the Internet mail clients 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 meet the following requirements:

- You have all of the information you need in the Desktop Messaging and My CallPilot preinstallation checklist.
- User workstations have the required software for Desktop Messaging. For more information, see "Desktop Messaging requirements" (page 63).

Running Desktop Messaging installation

You have two installation options for Desktop Messaging:

- **Complete installation**--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 installed. CallPilot Desktop Messaging does not support Microsoft Outlook and Novell GroupWise on the same computer.

- **Feature installation**--You are prompted to choose which features to install. The features are presented through the Windows Installer feature tree.

ATTENTION

There are two options if you are installing from the Web:

- You can compress all of the installation files and point the Web link to this file. You can download the compressed file to a computer, extract the contents, and double click on **`setup.exe`** to commence installation.
- You can load the appropriate software in a shared network, and the you can install by double-clicking on **`setup.exe`**.

To perform a complete installation of Desktop Messaging software

Step	Action
1	Browse to the **setup.exe** file on the CallPilot Desktop Messaging CD-ROM.

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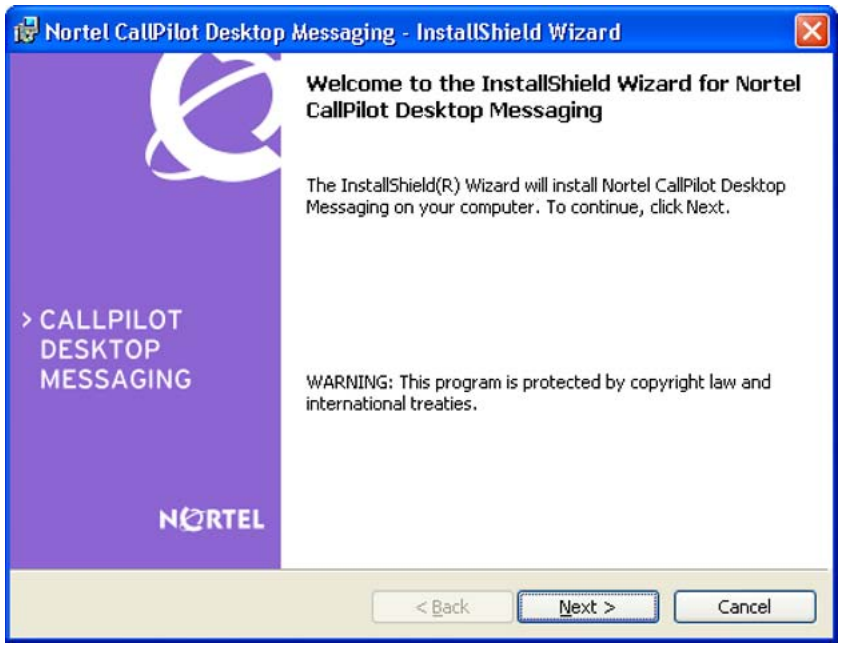
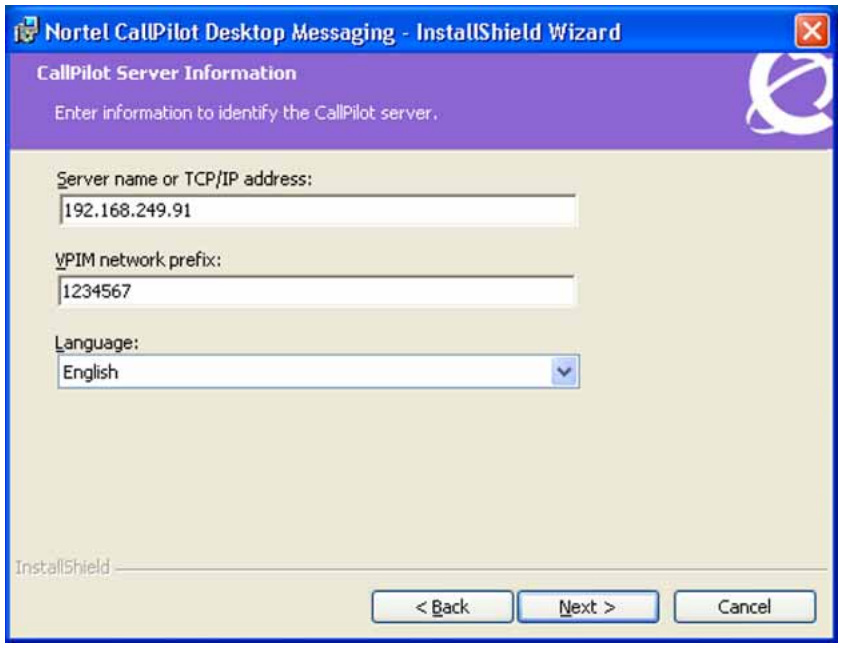
2 Double-click the **setup.exe** file.

The InstallShield Wizard appears.



3 Click **Next**.

The CallPilot Server Information window appears.



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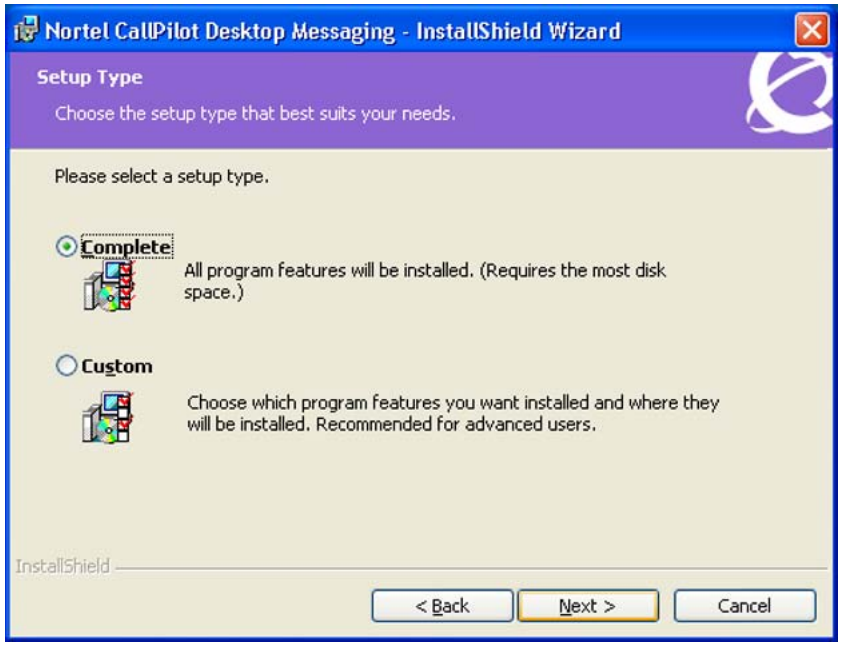
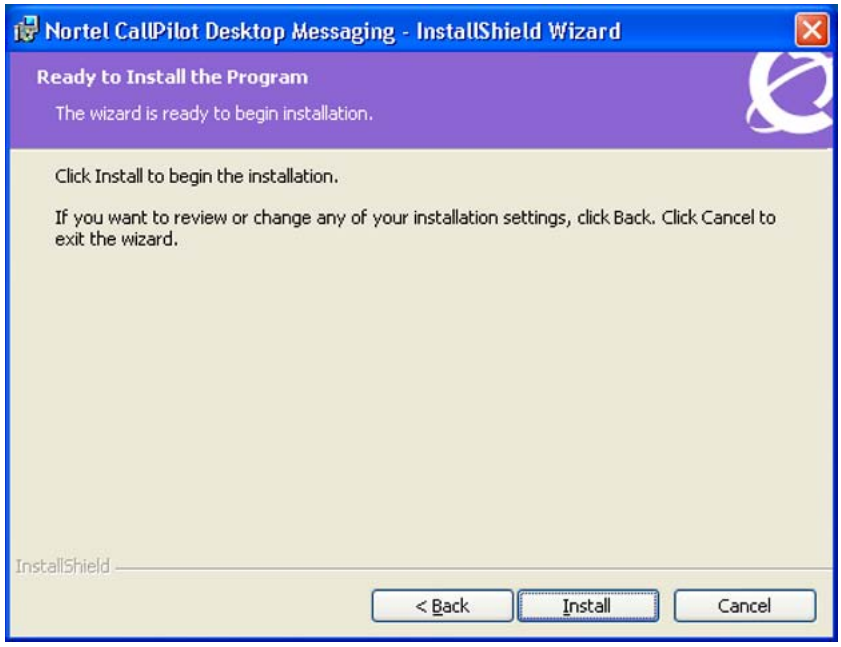
4 The CallPilot Server Information window is used to set the **Server Name or TCP/IP address**, **VPIM network prefix**, and **Language**. Click **Next**.

The Setup Type window appears.



5 Choose **Complete** and click **Next**.

The Ready to Install the Program window appears.



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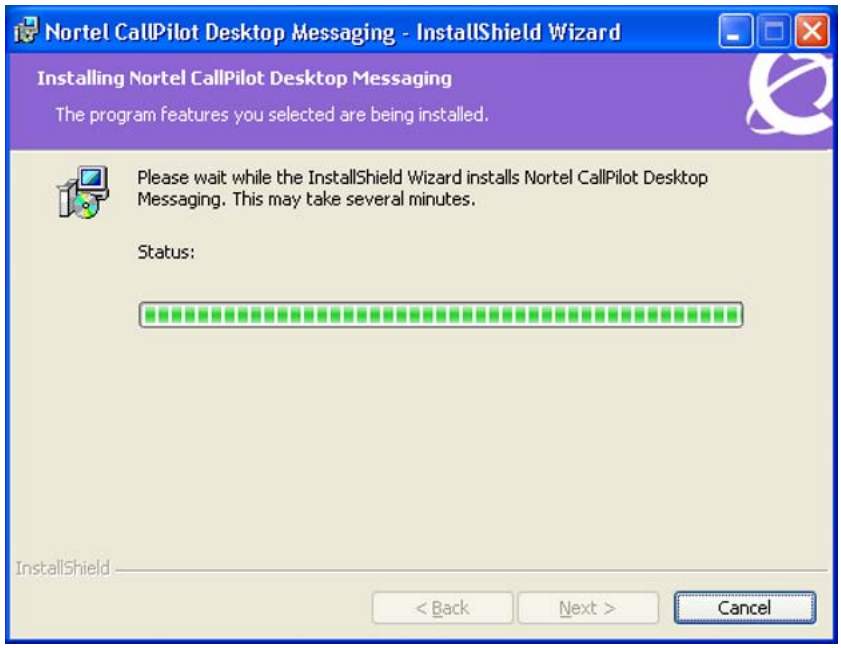
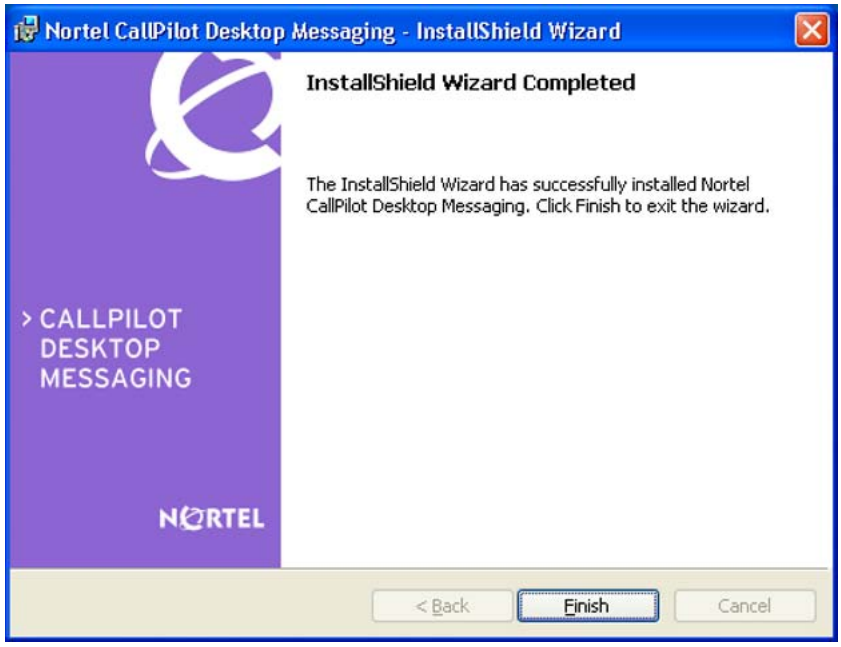
6 Click **Install**.

The Installing Nortel CallPilot Desktop Messaging window appears.



When the installation is complete, the InstallSheild Wizard Completed window appears.



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7 Click **Finish**.

You have successfully installed Desktop Messaging 5.0.

8 If CallPilot Desktop Messaging was installed centralized using system management applications such as Microsoft's System Management Server (SMS), perform the following:

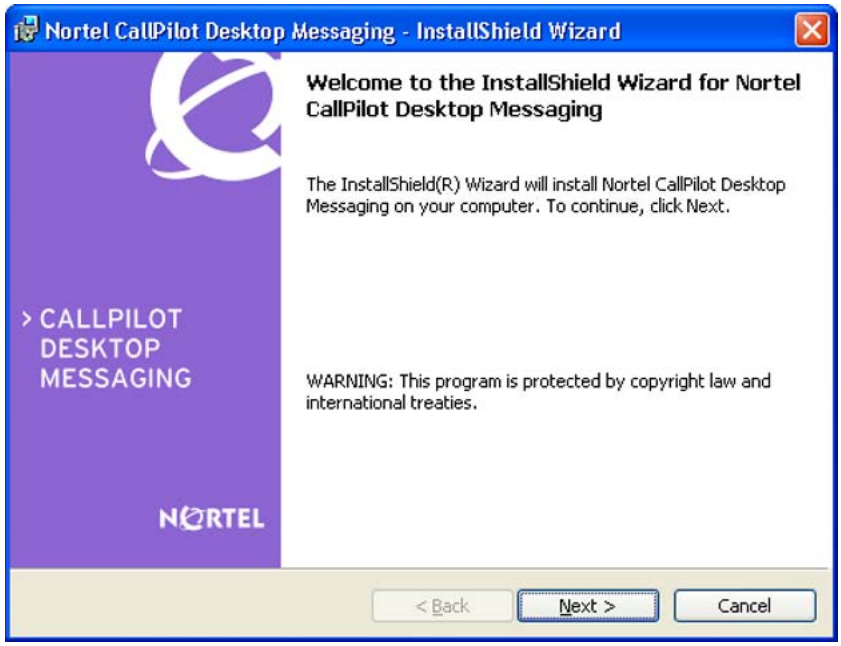
- For Microsoft Outlook and Novell GroupWise: Click **Start > Programs > Nortel > CallPilot Desktop Messaging > Add CallPilot to Default Mail Profile**.
- For Lotus Notes: Click **Start > Programs > Nortel > CallPilot Desktop Messaging > Lotus Notes > Lotus Notes Integration Utility**.

—End—

To perform a feature installation of Desktop Messaging software

With a feature installation, you can choose which features to install. Only features valid for the user's computer display.

Step	Action
1	Browse to the **setup.exe** file on the Desktop Messaging CD-ROM.
2	Double-click the **setup.exe** file. *The Welcome window appears.*



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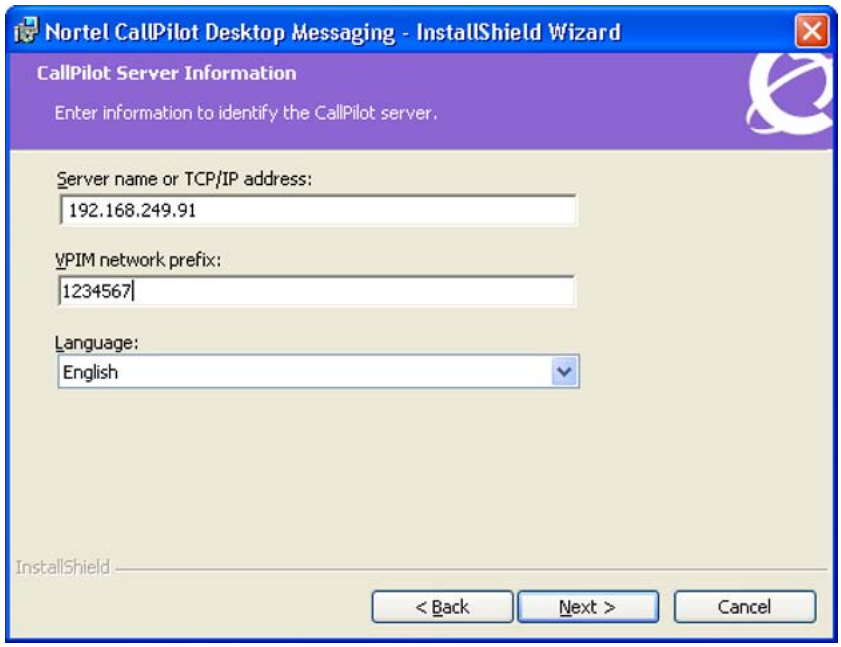
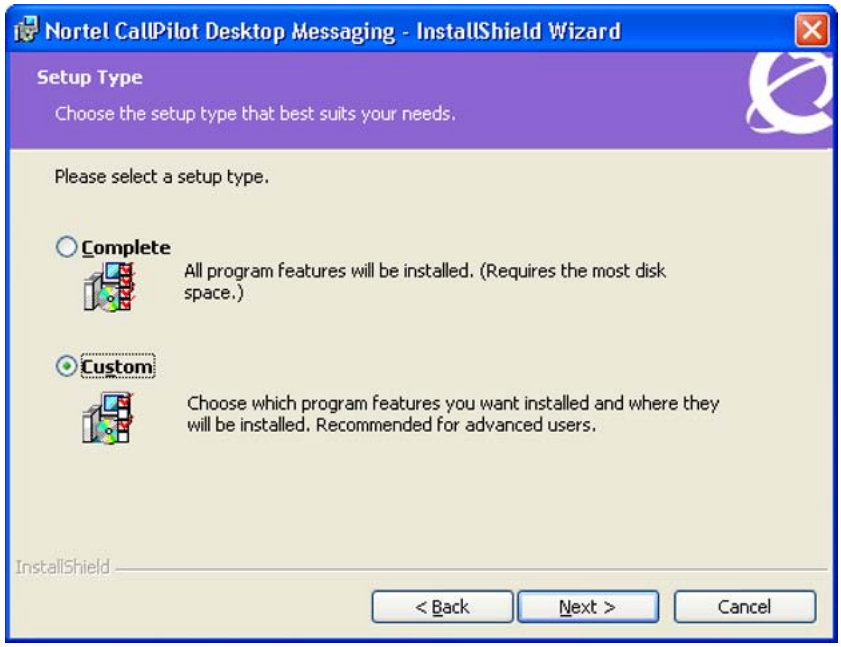
3 Click **Next**.

The CallPilot Server Information window appears.



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

The Setup Type window appears.



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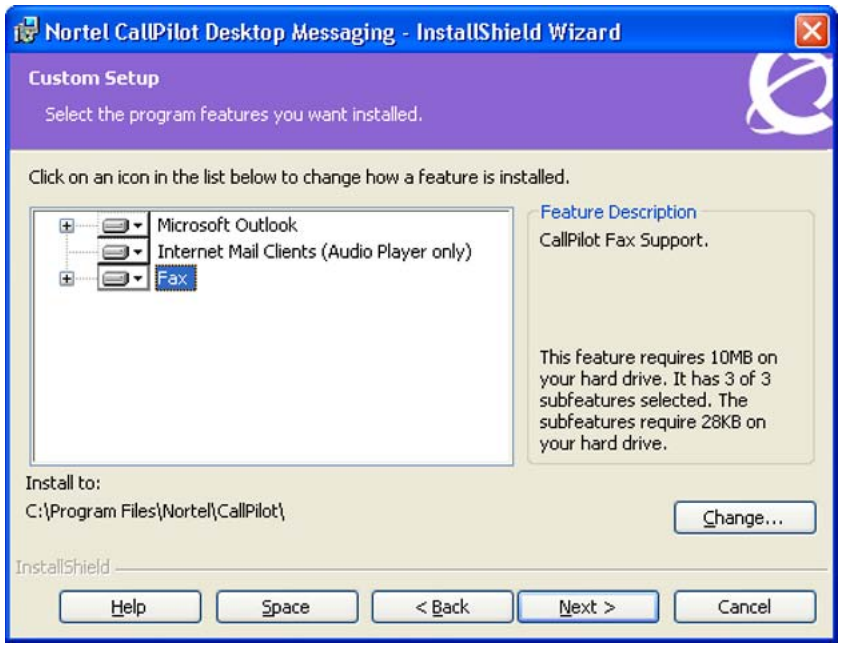
5 Choose **Custom** and click **Next**.

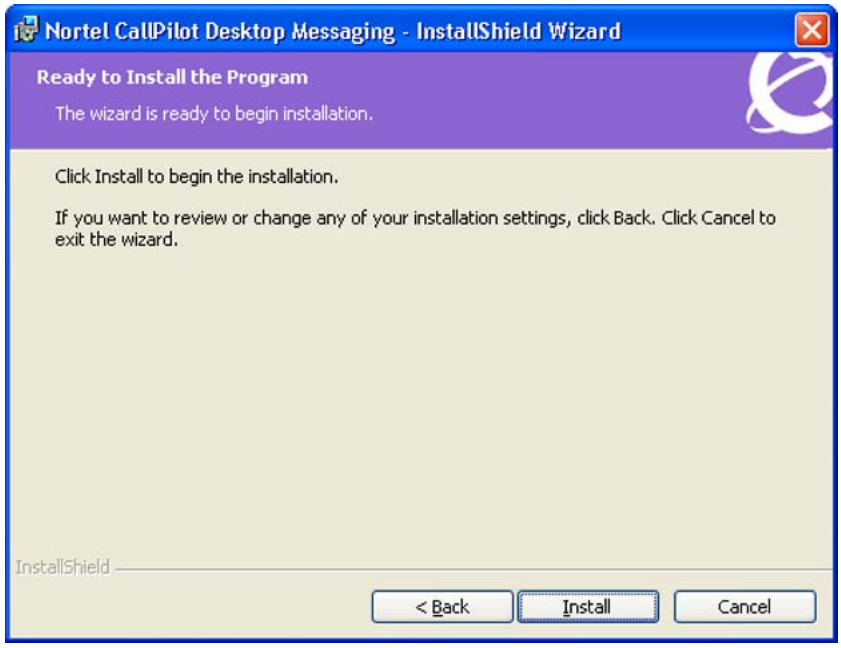
The Custom Setup window appears.



6 Click on the plus signs expand the feature tree and view all features.

7 Select the features you want to install and click **Next**.

The Ready to Install the Program window appears.



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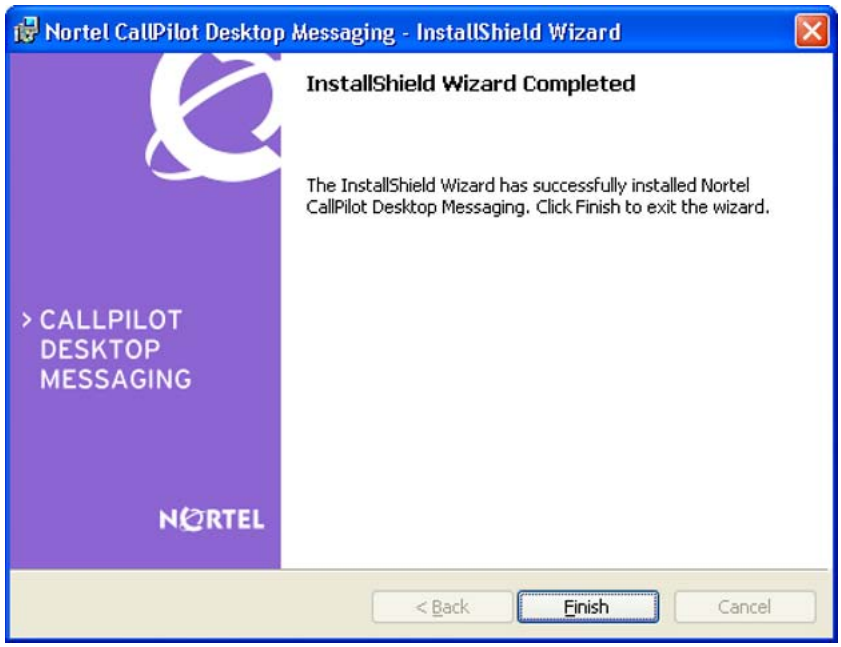
8 Click **Install**.

The InstallShield Wizard Completed window appears.



9 Click **Finish** to complete the custom installation.

—End—

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 you install a newer version of Desktop Messaging.

To uninstall Desktop Messaging

Step	Action
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**.

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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.

—End—

- **Desktop Messaging 2.0 or later**--You can upgrade to Desktop Messaging 5.0 without removing the previously installed release.
- Upgrade of Callpilot Desktop Messaging 5.0 from a previous version does not support **msi** format (in quiet, passive and interactive mode). You must use **setup.exe** to perform the upgrade.

Windows Installer (MSI) Support

The CallPilot Desktop Messaging installer has been created for the Microsoft Windows Installer. The Windows Installer supports the latest releases of Microsoft Windows and includes support for customizable installations. With MSI support, administrators can automatically install the desktop client to multiple PCs through the use of system management applications such as Microsoft's System Management Server (SMS).

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. Install CallPilot on only the Windows Terminal Server; do not install CallPilot on the client computer.

Supported platforms

The CallPilot 5.0 platform supports Desktop Messaging in the Citrix Thin Client environment.

The Desktop Messaging client supports:

- Citrix Metaframe XP on Windows 2000/2003 server
- Citrix Metaframe Presentation Server 3.0 and 4.0 on Windows 2003 server

Citrix Thin Clients must run on Windows 2000 or Windows XP.

Installing CallPilot Desktop Messaging on the Windows Terminal Server

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

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

- **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 can choose to call NMLNADBK.EXE as a scheduled task to automate the CallPilot Public Address Book update.

  In addition to the CallPilot Public Address Book, a searchable CallPilot Directory on the CallPilot server can be used.

Preparing the Windows Terminal Server for My CallPilot

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

The system administrator can 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 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 can manually update the program's command line. This provides access to the Nortel Fax/Nortel Fax Batch printers.

You can skip this step if access to the Nortel Fax/Nortel Fax Batch printers is not required. You can also skip this step when publishing the Windows desktop.

After installing the CallPilot Desktop Client on the Windows Terminal Server, the system administrator must give all CallPilot users write access to the Nortel folder (C:\Program Files\Nortel).

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

Step	Action
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\nda\daemon" -P (or in some cases -A) **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 in the following paragraphs)

Note: The default CallPilot installation location is "C:\Program Files\Nortel\CallPilot". However, the system administrator can change the location during CallPilot installation.

The -P option works for most applications. However, if an application 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.

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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 is only used when the -P option does not work.

—End—

Installing CallPilot Desktop Messaging in a Lotus Notes multi-user environment

CallPilot Desktop Messaging supports installation of Lotus Notes in a multi-user environment. The multi-user environment enables multiple users to sequentially log in to the same machine and use the same Lotus Notes install directory with their own Lotus Notes data directory. Note that this is a Lotus Notes feature, not a CallPilot Desktop Messaging feature. For more information about installing Lotus Notes in a multi-user environment, refer to the documentation provided with the Lotus Notes software.

In a multi-user environment, there are two methods available for updating the Lotus Notes mail database automatically on the Domino server:

- Method 1—Update mail database automatically during CallPilot Desktop Messaging installation. You can run the CallPilot Desktop Messaging installer multiple times on the same local PC, each time selecting a different Lotus Notes notes.ini file. This file contains the name of the user mail database on the Domino server.
- Method 2— Update mail database automatically using the administration utility (LNSERVER.EXE). This method is more efficient than Method 1 because you can update multiple mail databases on the Domino server by running the administration utility.

  Detailed procedures for using the LNSERVER.EXE utility are provided in the section "To update the database design on the Domino server" (page 91). Note that the utility is for Windows-based Domino servers only.

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Chapter 6
Configuring Desktop Messaging

This chapter contains the following sections:

"Section A: Configuration requirements" (page 79)

"Section B: Configuring groupware clients" (page 84)

"Section C: Configuring Internet mail clients" (page 95)

"Section D: Configuring Citrix Thin Clients" (page 108)

"Section E: Configuring Fax Services" (page 115)

Section A: Configuration requirements

Overview

This chapter describes how to configure e-mail clients.

Supported clients

Desktop Messaging supports groupware clients that run with a corporate e-mail server, IMAP Internet mail clients, and Citrix Thin Clients.

- **groupware client**--Groupware is software designed for group collaboration. Desktop Messaging for groupware clients provides access to commands and online Help specific to Desktop Messaging directly from the client. During installation, Desktop Messaging customizes these clients to make messaging tasks simpler and more efficient. Most or all configuration is performed automatically during Desktop Messaging installation.
- **Internet mail client**--An e-mail client that lets you manage CallPilot messages from a folder in the e-mail client using the IMAP protocol. You must manually configure the Internet mail clients with the settings required to connect to the CallPilot server.

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- **Citrix Thin Client**--A client computer running a Windows-based operating system with Citrix ICA software connected to a Windows Terminal Server with Citrix Metaframe.
- **Other supported clients**
  - Web clients/browsers
  - Macintosh My CallPilot
  - Linux My CallPilot

Desktop Messaging supports the following clients. For the most up-to-date list of clients, see the CallPilot 5.0 *Distributor Technical Reference bulletin*.

Groupware clients	Internet clients
• Microsoft Outlook 2002 (XP) 2003 and 2007 • Novell GroupWise 6.5 and 7.0 • Lotus Notes 6.0, 6.5, and 7.0	• Microsoft Outlook Express 6.0 • Microsoft Outlook 2002 (XP), 2003 and 2007 in Internet mail mode • Vista Windows Mail

Port numbers

E-mail clients connect to servers on a specific port. When you configure e-mail clients, the port number must match the port number defined on the CallPilot server. The default port for each server depends on whether you are using SSL encryption.

Protocol	Unencrypted	SSL encrypted
HTTP	80	443
IMAP	143	993
SMTP	25[a]	465[b]
LDAP	389	636
FTP	21	---

a. Port 25 is the mandatory setting. You cannot use any other value.

b. Port 465 is the mandatory setting. You cannot use any other value.

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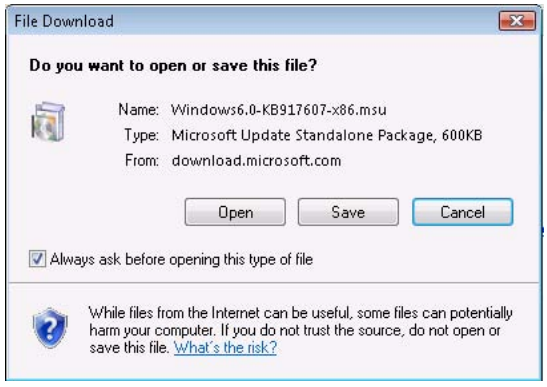
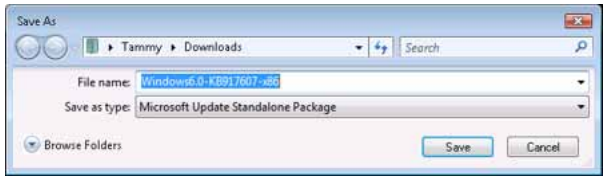
Windows update KB917607 (Optional)

If you install Windows Vista on the client, users cannot view online help for Agent Desktop Displays. To view online help, you must download and install Windows update KB917607 on to each client. This update includes the WinHlp32.exe file, which is required to view WinHelp help files, such as Agent Desktop Display online Help.

Downloading and installing Windows update KB917607

Step	Action
1	You must install Windows Vista before you can install this update. Go to www.microsoft.com.
2	Search for **KB917607**.
3	In the list of search results, browse to and click the download link.
4	Follow the download instructions. The file that you download is a Microsoft Update Standalone Package (MSU) file which contains the WinHlp32.exe. *The File Download dialog box appears.* 
5	Click **Save**. *The Save As dialog box appears.* 
6	Browse to a folder in which to save the update, and then click **Save**. *The Download Complete dialog box appears.*

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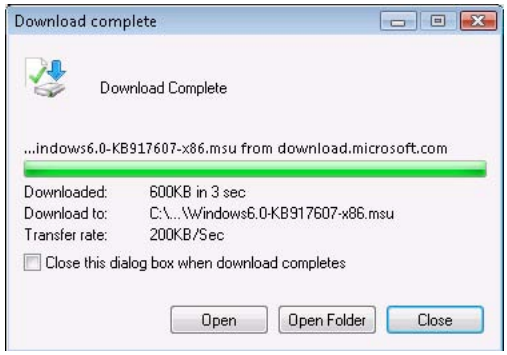
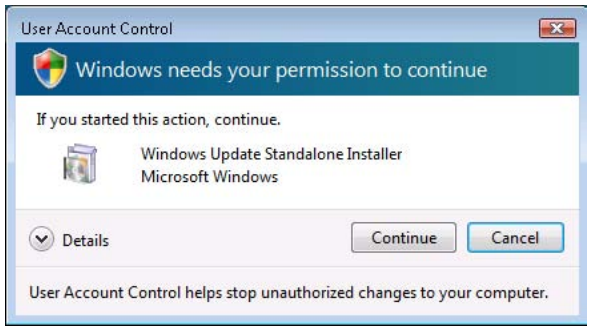


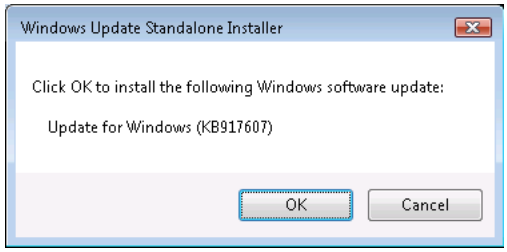
7 Click **Open**.

The User Account Control dialog box appears.



8 Click **Continue**.

The Windows Update Standalone Installer searches for updates and the following dialog boxes appear.



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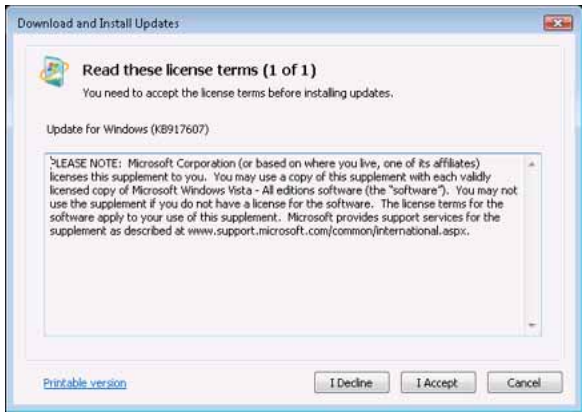
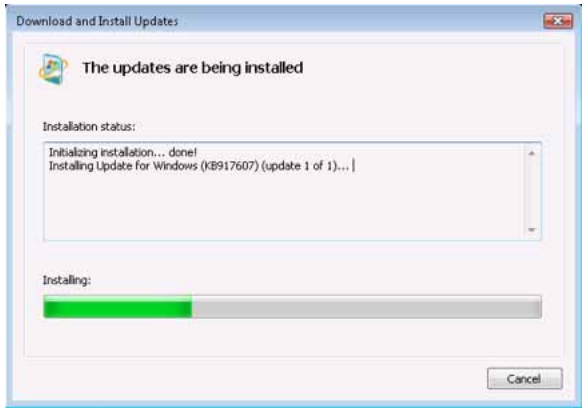
9 Click **OK** to install Windows update KB917607.

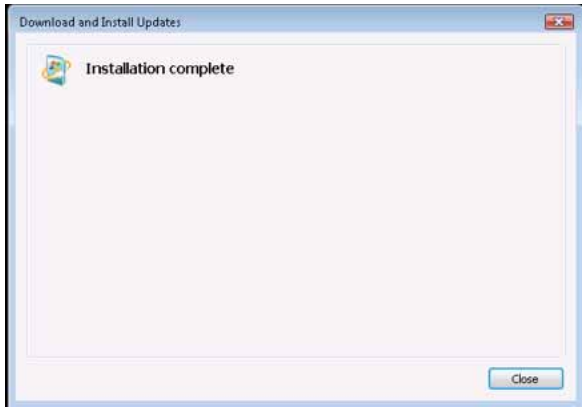
A license terms dialog box appears.



10 Click **I Accept** to accept the license terms.

The following install dialog boxes appear.





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11	Click **Close** to complete the installation.

—End—

Section B: Configuring groupware clients

In this section

"Configuring Microsoft Outlook" (page 84)

"Configuring Novell GroupWise" (page 89)

"Configuring Lotus Notes" (page 89)

"Setting up the CallPilot Address Book" (page 91)

"Password prompts" (page 94)

"Lotus Notes Auto-refresh" (page 95)

Configuring Microsoft Outlook

Microsoft Outlook is automatically configured during Desktop Messaging installation.

The following section describes how to configure Microsoft Outlook 2002 (XP) and 2003 (Microsoft Office XP client) if you are using it as an IMAP client.

Before you begin, ensure that you have all the information required to configure an Internet mail client. For more information, see "Requirements" (page 95).

Note: In CallPilot 5.0, you have the option to deliver CallPilot messages to your E-mail inbox or you can have CallPilot messages delivered to your CallPilot Inbox.

Outlook 2002 and Outlook 2003

To define your CallPilot mailbox settings

Step	Action
1	Choose **Tools > E-mail Accounts**. The E-mail Accounts wizard appears.
2	Select **Add a new e-mail account**, and then click **Next**. The E-mail Servers page appears.

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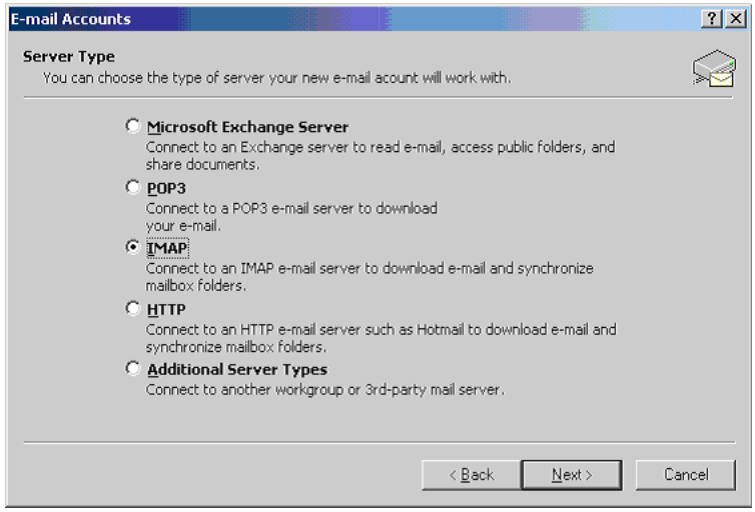
3 Select **IMAP**, and then click **Next**. The Internet E-mail Settings (IMAP) page appears.



4 Specify the settings for your CallPilot mailbox:

- **User Information**--Type your name and CallPilot address in the boxes. Type your address in the following form:

  <VPIM network shortcut><mailbox number>@<local CallPilot server>

- **Logon Information**--Type your CallPilot mailbox number and password in the boxes.

  Note: Do not select the Log on using Secure Password Authentication (SPA) check box.

- **Server Information**--Type the CallPilot FQDN in both boxes.

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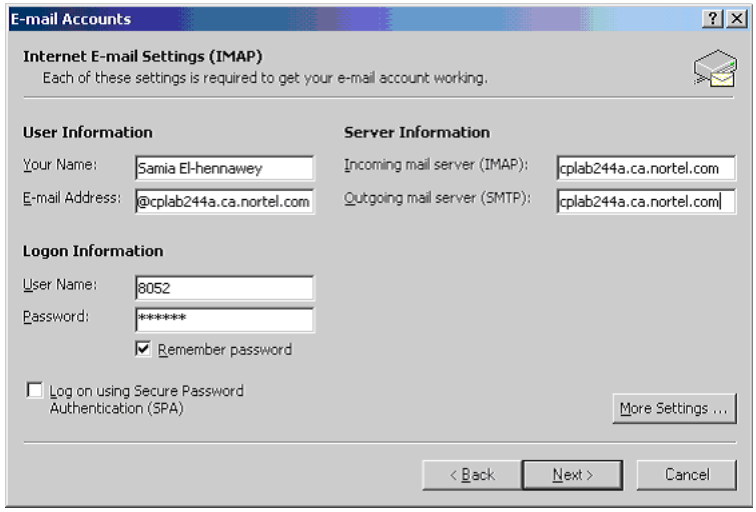

5 Click **Next**. A confirmation page appears.

6 Click **Finish**.

—End—

To configure access to the CallPilot Address Book

Step	Action
1	Choose **Tools > E-mail Accounts**. The E-mail Accounts wizard appears.
2	Select **Add a new directory or Address Book**, and then click **Next**.
3	Choose **Internet Directory Service (LDAP)** and then click **Next**.

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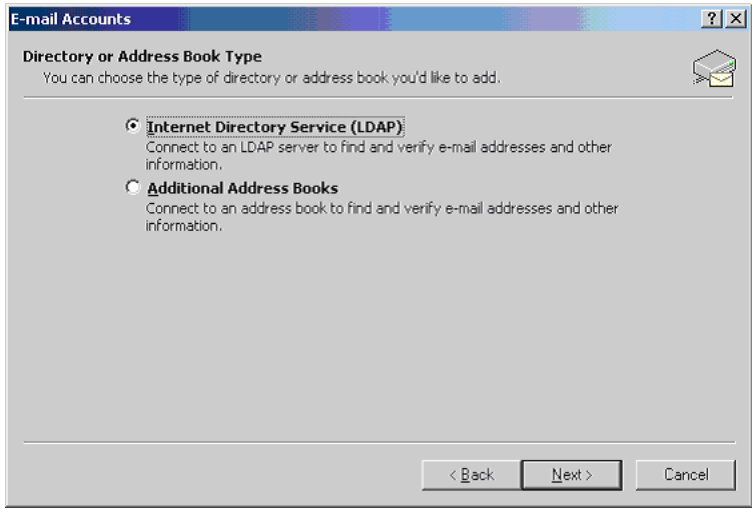
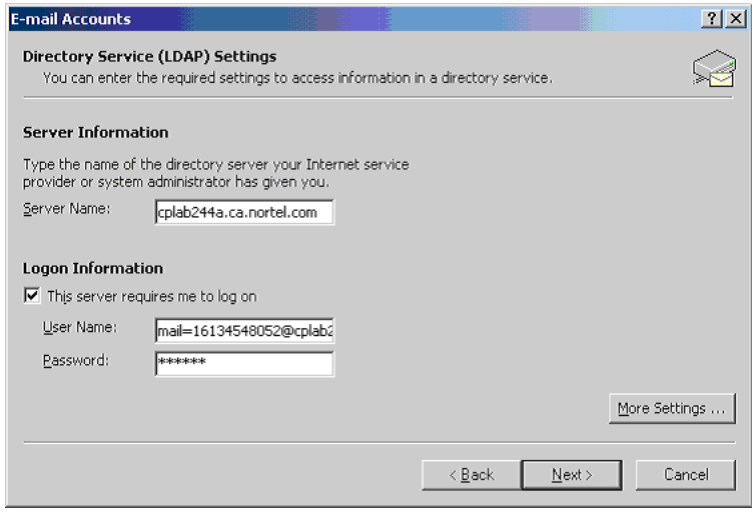


4 Specify the following information:

- In the Server Name box, type the CallPilot FQDN.
- If the CallPilot Address Book requires you to log on, select the **This server requires me to log on** check box, and then type your user name and password in the User Name and Password boxes. The User name for LDAP logon uses the following format:

  mail=<VPIM network shortcut><mailbox number>@<local CallPilot server>,<Search base>



Example: mail=16134548052@cplab244a.ca.nortel.com,dc=nortel,dc=ca

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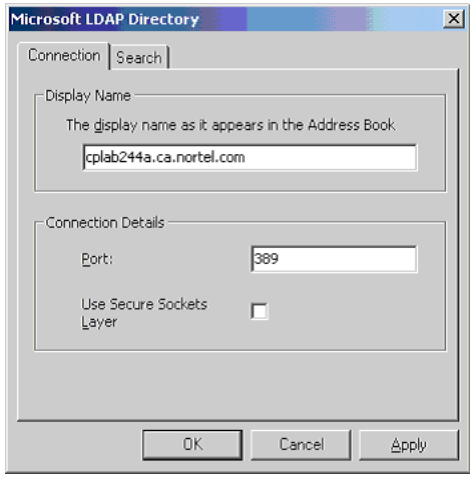
Note: You must log on to the CallPilot Address Book to view distribution list addresses.

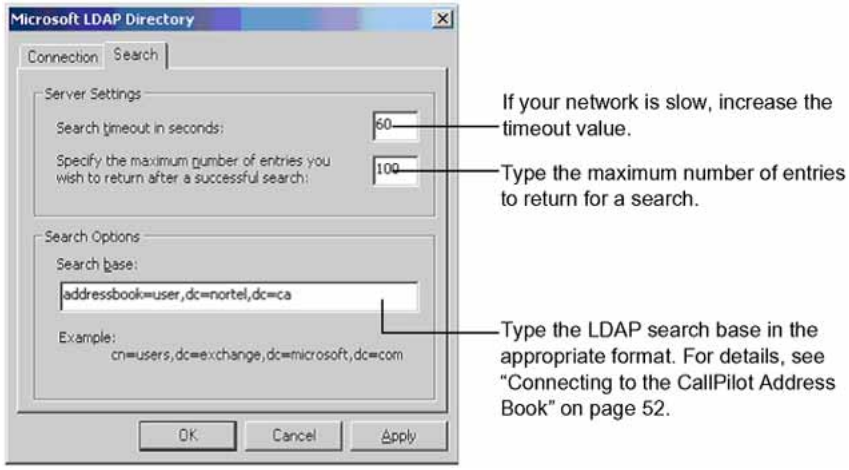
5 Click **More Settings**. The Microsoft LDAP Directory dialog box appears.

6 Click the **Connection** tab.



7 In the Display Name box, type a descriptive name for the Address Book (for example, CallPilot Address Book).

8 Click the **Search** tab.



9 Specify the appropriate information, and then click **OK**. You must specify the correct search base.

10 Click **Next**. A confirmation page appears.

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11	Click **Finish**.

—End—

To configure text formatting

Step	Action
1	Choose **Tools > Options**.
2	Click the **Mail Format** tab.
3	In the **Message Format** section, select **Plain Text**.
4	Click **OK**.

—End—

Configuring Novell GroupWise

Introduction

This section provides details about moving CallPilot messages to other mail folders in GroupWise.

Moving messages

All incoming CallPilot messages are stored in a separate CallPilot Desktop Messaging folder. CallPilot can create a CallPilot Sent Item folder to store CallPilot sent messages.

Nortel does not recommend or support moving CallPilot messages to other folders. The incoming CallPilot messages moved out of CallPilot Desktop Messaging folder are restored in the CallPilot Desktop Messaging folder the next time synchronization occurs.

CallPilot installs two custom fields–Subject and To (only used in the CallPilot Sent item folder). The fields remain until the GroupWise server is rebuilt. GroupWise and GroupWise applications are not affected by these fields.

To permanently remove the CallPilot Desktop Messaging folders, you must uninstall Desktop Messaging.

Configuring Lotus Notes

Introduction

This section provides the following configuration details:

- updating the Lotus Notes database design for Desktop Messaging

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- setting up a copy of the CallPilot Address Book on the Lotus Notes server, and configuring automatic updates of the CallPilot Address Book
- disabling multiple password prompts in Lotus Notes
- enabling the Lotus Notes Auto-refresh feature

Updating the Mail database design

In Lotus Notes, the Mail database design determines which messages appear in the Lotus Notes message list. You can use two methods to automatically update the database design for Desktop Messaging, or you can manually replace the database design. These methods can also be used in a multi-user environment:

- **Update the database automatically during Desktop Messaging installation** (recommended)
- **Update the database automatically using the administration utility (LNSERVER.EXE)**
- **Update the database manually by replacing the database design**

Nortel strongly recommends the automatic update option. It provides the optimal configuration for message storage, is compatible with customized database designs, and does not require any manual updates to the database design. The CallPilot administrator performs manual updates only if required.

Important: Whether the automatic or manual update option is used, a user needs sufficient access rights to update Mail database templates during the Desktop Messaging installation. Lotus Notes 6.0, 6.5 and 7.0 users need Manager rights.

Updating the database automatically during installation

To automatically update the Mail database, select the Update Lotus Notes mail database and Update Lotus Notes Personal Address Book options during Desktop Messaging installation. When installation completes, Desktop Messaging is ready for use and no manual changes are required.

When you use this update method, Lotus Notes stores CallPilot messages in a separate view. With this configuration you can easily prioritize CallPilot messages because they are not mixed with e-mail messages.

Updating the database using the administration utility

A Lotus Notes administrator can update one or more mail databases from the Lotus Notes server by running an update utility. By running the update utility, you can add the Desktop Messaging folders and views to the user's mail database without affecting any previous customization to the database.

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To update the database design on the Domino server

Step	Action
1	Install Desktop Messaging on the Lotus Notes server by running LNSERVER.EXE from the Desktop Messaging CD. ***Note:*** You must run LNSERVER.EXE on a Windows-based server. LNSERVER.EXE does not run on other types of servers.
2	From the **Start** menu, choose **Start > All Programs > Nortel > CallPilot Domino Server > Update Database Design**. The Update CallPilot mail databases dialog box appears.
3	Select **Add CallPilot components**, and then click **OK**. The Select database(s) dialog box appears.
4	Select the mail files to update, and then click **Open**. *A dialog box appears: CallPilot Desktop Messaging has updated your Lotus Notes initialization file. Please exit and restart Lotus Notes.*
5	Click **OK**. *The Database Design Update is completed dialog box appears.*
6	Click **OK**.

—End—

Updating the database manually

Note: Nortel strongly recommends that you do not update the database manually.

A Lotus Notes administrator or user can replace the database design. Replacement of the mail database removes all customization to the database. Users can consider replacing the database design only if they want CallPilot messages to be placed within the Lotus Notes Inbox along with e-mail messages. For more information, see "Replacing the mail database design in Lotus Notes" (page 172).

Setting up the CallPilot Address Book

Desktop Messaging supports two methods of storing or accessing CallPilot address information in Lotus Notes:

- **In Lotus Notes Personal Address Book**--Users access address information downloaded from the CallPilot server to the Personal Address Book on the user PC. This option is useful when users travel because they do not need to connect to the network to address

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messages. Users must manually download the address information from the CallPilot server regularly to ensure that address information is up to date.

- **In the special CallPilot Public Address Book designed to store CallPilot address information on the Lotus Notes server**--Users access address information downloaded from the CallPilot server to the special Public Address Book on the Lotus Notes server. By using this method, users do not need to manage a local copy of the Address Book. In addition, this method saves disk space and slightly reduces LAN traffic.

When you install Desktop Messaging for Lotus Notes on a user's workstation, the user downloads the CallPilot Address information regularly to access and maintain a copy of the Personal Address Book on the local computer.

If you want users to access the Public Address Book from the Notes server, you must set it up for them. To do that, install an empty Lotus Notes database (callpilot.nsf) on the server, and populate the database with the CallPilot Address Book information.

You must update the Address Book on the Notes server regularly with the latest address information. You can manually download the Address Book or configure the automatic update utility as a scheduled task to update the CallPilot Address Book stored on the Notes server.

To install the CallPilot database

Step	Action
1	Insert the CallPilot Desktop Messaging CD in the Domino server CD-ROM drive.
2	Run **LNSERVER.EXE**. An empty callpilot.nsf file is copied to the Lotus Notes server.

—End—

To add the CallPilot database to the Lotus Notes workspace

Step	Action
1	Open the Lotus Notes workspace. From the ICON menu click **Databases** and then click **WorkSpace**.
2	From the Lotus Notes workspace click**File > Database > Open**. The Open Database dialog box appears.

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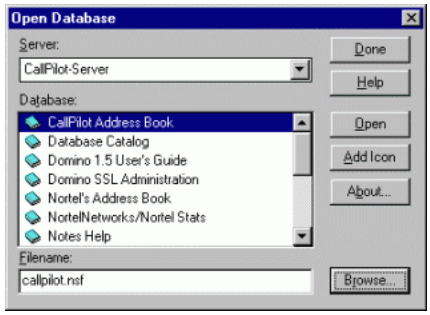
3 Open the Lotus Notes database from the server.

Note: Ensure that you open the database from the server, not locally.



4 In the database list, find CallPilot Address Book database (filename: callpilot.nsf).

5 Click **Open**.

6 Click **Add Icon** to add the icon to the server workspace. The new icon appears on the Lotus Notes server workspace.

7 Click the icon, and then open the Address Book.

8 Choose **View > CallPilot (People)**.

9 Choose **Actions > Download CallPilot Address Book**.

Note: To download the Address Book, you must have a valid CallPilot mailbox and password. Contact your IS administrator if you do not have a password.

10 If the **Download CallPilot Address Book** command is unavailable on the Actions menu, do the following:

a. Open the callpilot.nsf file in Designer Mode.

b. Choose **Actions > Download CallPilot Address Book**.

c. Choose **Edit > Properties**.

d. Ensure that the **Hide Action if Formula is True** check box is cleared.

e. Close the Properties window. The Download CallPilot Address Book command is now available.

—End—

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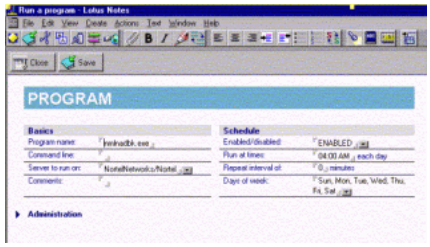
To set up the automatic update utility

Step	Action
1	Run **LNSERVER.EXE** if you did not already do so.
2	To avoid entering the Lotus Notes password multiple times, configure Notes to share the Notes password with Notes programs. For more information, see "Password prompts" (page 94).
3	Open the **Public Address Book**.
4	Navigate to **Folders** and **Views/Servers/Program**.
5	Select **Program**, and then click **Add Program**. The Program window appears. 
6	In the program name box, type **nmlnadbk.exe**. Ensure the command line box is empty.
7	Set Enabled/Disabled to **Enabled**.
8	Select the time and frequency at which you want the update utility to run.
9	Click **Save**, and then close the dialog box. Lotus Notes updates the Address Book based on the specified schedule.

—End—

Password prompts

By default, Lotus Notes prompts for a Notes password when you access an application linked to Lotus Notes. This means that when Desktop Messaging for Lotus Notes is installed, you must enter the Notes password twice—when you start Notes, and the first time you access the Desktop Messaging folder during the Notes session. If desired, users can disable the Notes password prompt for the Desktop Messaging folder.

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To disable the Notes password prompt for Desktop Messaging

Step	Action
1	In Notes, choose **File > Tools > Security > User Security**. The Enter Password dialog box appears.
2	Type your Notes password, and then click **OK**. The Security dialog box appears.
3	Select the option **Don't prompt for a password from other Notes-based programs**.
4	Click **OK**.

—End—

Lotus Notes Auto-refresh

Note: This setting affects the user interface of the desktop clients. When connected to a CallPilot 5.0 server, the CallPilot configuration control Auto Refresh (F9) is hidden. The user is not able to check or clear the Lotus Notes Refresh Agent.

Section C: Configuring Internet mail clients

This section contains the following topics:

"Configuration overview" (page 95)

"Configuring Microsoft Outlook Express" (page 98)

Configuration overview

Introduction

To use CallPilot with an Internet mail client, you must create and configure an account for your CallPilot mailbox. The process is similar to setting up a new e-mail account.

Before you begin, ensure you have all of the information you need from the Desktop Messaging and My CallPilot preinstallation checklist.

Requirements

You need the following information to configure an Internet mail client:

- the CallPilot mailbox number and password
- the VPIM network shortcut of the CallPilot server
- the fully qualified domain name (FQDN) or CLAN IP address of the CallPilot server

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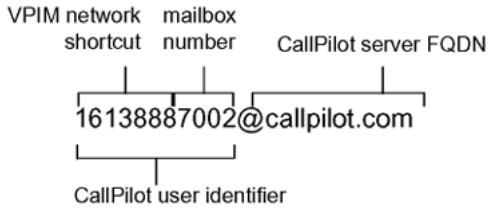
- the search base to use for address searches in the CallPilot directory

The mailbox number, VPIM network shortcut, and FQDN form your CallPilot address. It is in the same format as an e-mail address.



For all Internet mail clients, you must specify the following information.

Setting in your e-mail client	Required CallPilot information
IMAP server name The mail server for incoming mail.	Use the CallPilot server FQDN or CLAN IP address.
SMTP server name The mail server for outgoing mail.	Use the CallPilot server FQDN or CLAN IP address.
LDAP server name The directory server that contains the CallPilot Address Book.	Use the CallPilot server FQDN or CLAN IP address.
LDAP search base The criteria used to locate CallPilot addresses on the LDAP server.	Use the search base configured on your LDAP server with the prefix that identifies the type of addresses you want to access. For more information, see "Connecting to the CallPilot Address Book" (page 97).
User name The name that uniquely identifies your mailbox.	Use your CallPilot user identifier.

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Setting in your e-mail client	Required CallPilot information
Text settings Ensure that messages you send from your CallPilot mailbox are in plain text format.	Ensure that your e-mail client is configured to send messages in plain text format.
Encryption settings	If your CallPilot server supports SSL encryption (IMAP and SMTP protocols only, not LDAP, when using Internet mail clients), you can enable SSL encryption in your e-mail client to increase the security of your messages.

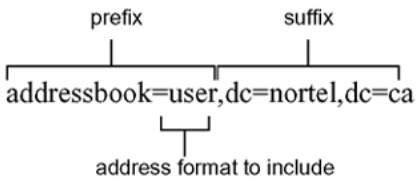
CallPilot administrators can provide the server information and VPIM network shortcut to users who need to manually configure Desktop Messaging. You can also obtain the components of the CallPilot address from CallPilot Player. Choose **View > Options** and then click the **General** tab to view the mailbox and server settings.

The security options that your messaging system supports depend on the configuration of the CallPilot server and the configuration of your e-mail client. For details about the supported options in your e-mail client, see your e-mail client online Help.

Connecting to the CallPilot Address Book

The CallPilot Address Book includes the addresses of individual users with mailboxes on the local CallPilot server and distribution list addresses.

When you configure an Internet mail client, you must specify the Address Book search base. The search base is the directory root for the part of your company or organization served by the CallPilot server. When you use Desktop Messaging with a CallPilot 2.0 (or greater) server, the search base includes both a prefix and a suffix.



Note: **The address book name in the search base must be in lower case.**

The address type you specify in the search base prefix determines the address types that you can access from the Address Book.

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address types	prefix
individual recipients	addressbook=user
individual recipients and shared distribution lists	addressbook=usersdl
shared distribution lists (SDLs)	addressbook=sdl
personal distribution lists (PDLs)	addressbook=pdl
broadcast distribution lists (BDLs)	addressbook=bdl

Configuring Microsoft Outlook Express

Introduction

This section describes how to configure Microsoft Outlook Express.

Before you begin, ensure that you have all the information required to configure an Internet mail client. For more information, see "Requirements" (page 95).

Outlook Express

To define your CallPilot mailbox settings

Step	Action
1	Choose **Tools > Accounts**.
2	Click the **Mail** tab.
3	Click **Add**, and then choose **Mail**. The Internet Connection Wizard starts.
4	Type your name in the Display name box and click **Next**.
5	Click **Next**. The Internet E-mail Address page appears.
6	Type your CallPilot address in the E-mail address box. Your address should be in the following form: *<VPIM network shortcut><mailbox number>@<local CallPilot server>*

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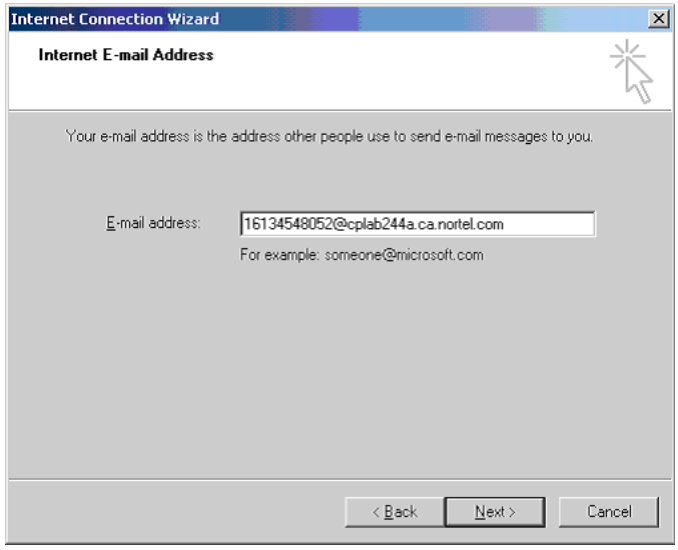
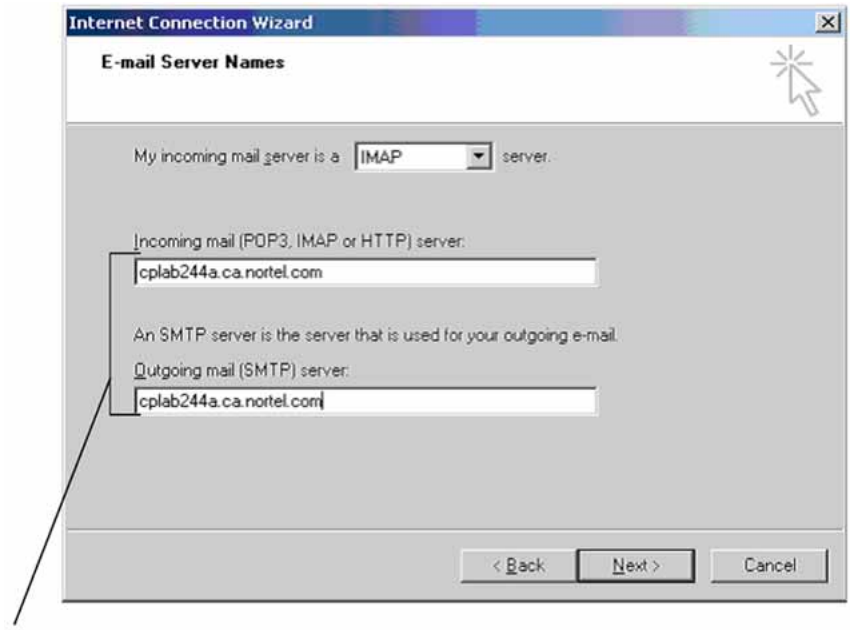


7 Click **Next**. The E-mail Server Names page appears. Type the CallPilot FQDN in both boxes if it does not automatically appear.

8 Select **IMAP** as the incoming mail server type.



Type the CallPilot FQDN in both boxes if it does not automatically appear.

9 Click **Next**. The Internet Mail Logon page appears with your IMAP account filled in.

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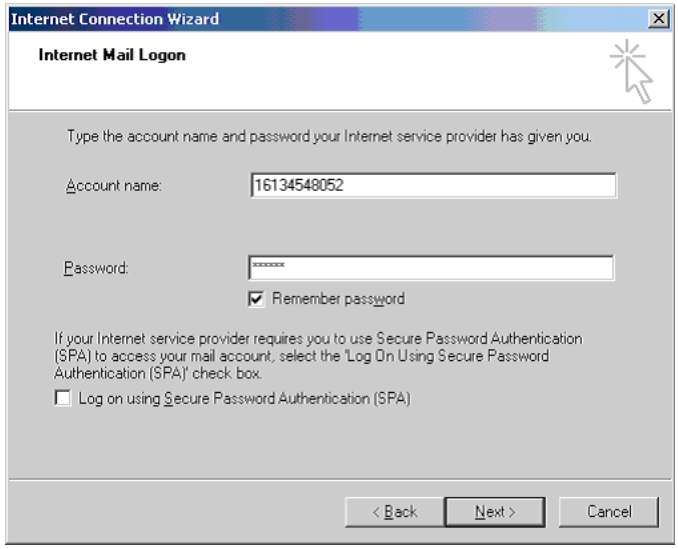
10 Type your CallPilot mailbox password in the Password box.



Note: Do not check the Log on using Secure Password Authentication (SPA) box.

11 Click **Next**. The Internet Connection Wizard - Congratulations page appears.

12 Click **Finish**. The Outlook Express window appears.

13 Select **Yes** to download the folder list for the IMAP account that you just created. Select **No** if you do not want to download the folder list at this time.

14 To make additional changes to your account settings, follow these steps:

a. Choose **Tools > Accounts**.

b. On the Mail tab, select your CallPilot account, and then click **Properties**.

c. Make the appropriate changes, and then click **OK**.

For example, if you want to enable SSL for incoming or outgoing messages, click the Advanced tab, and then check the **This server requires a secure connection (SSL)** box, as required.

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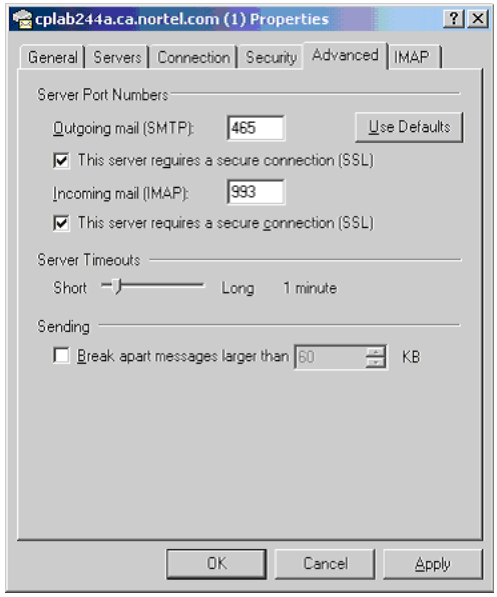

Note: If you enable SSL for the Outgoing mail (SMTP) server, you must manually change the port number to 465. CallPilot uses port 25 for unencrypted communication and port 465 for SSL encrypted communication with the SMTP server.

—End—

To configure access to the CallPilot Address Book

Step	Action
1	Choose **Tools > Accounts**.
2	Click the **Directory Service** tab.
3	Click **Add**, and then choose **Directory Service**. The Internet Connection Wizard starts.
4	On the Internet Directory Server Name page, specify the following: • Type the CallPilot server FQDN in the Internet directory (LDAP server) box. • If you want to access your Broadcast, Shared or Personal Distribution lists you must select the **My LDAP requires me to log on** check box. Enter your Account name as follows:

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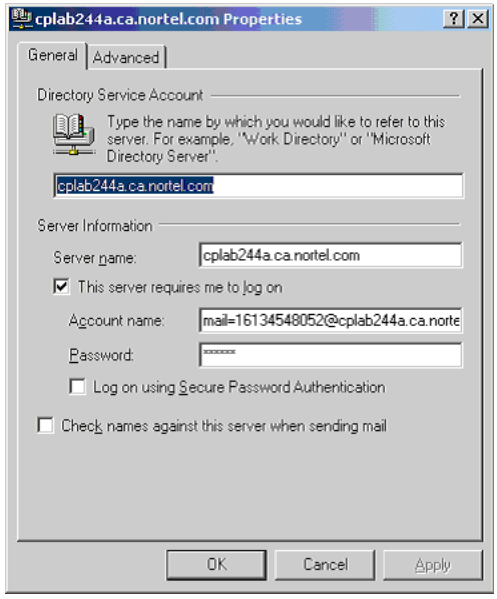
mail=<VPIM network shortcut> <mailbox number>@<local CallPilot server>,<Search base>

Example: mail=16129372549@cpi0008.us.nortel.com,dc=nortel,dc=ca

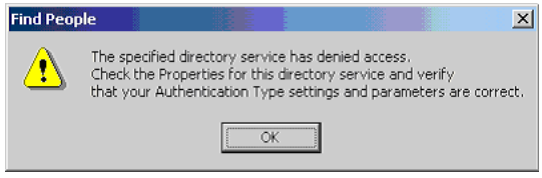
- Enter your CallPilot password for this mailbox.



ATTENTION

Do not select Log on using Secure Password Authentication. If you select this option, Outlook Express uses LDAPv3 only and the CallPilot server rejects the connection as it only supports LDAPv2.

The Find People error appears:



Note: If you are setting your search base (Advanced tab) to only search for users, you do not need to select the **My LDAP requires me to log on** check box.

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5 Click **Next**. The Check E-mail Addresses page appears.

6 To check for addresses in the CallPilot LDAP directory when addressing messages, click **Yes**.

7 Click **Next**. The Congratulations page appears.

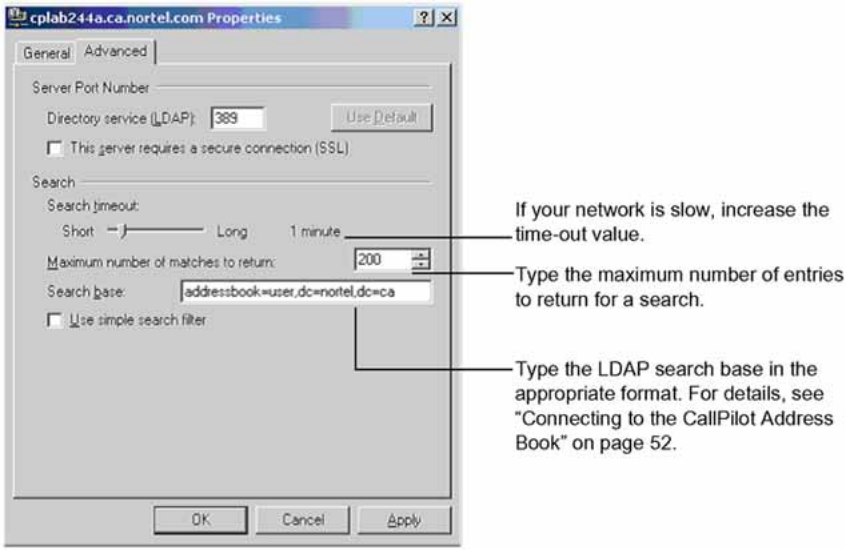
8 Click **Finish**. The Internet Accounts page appears.

9 Click **Properties**. The LDAP Server Properties dialog box appears.

10 Click the **Advanced** tab.

> **ATTENTION**
> The **Require SSL** is supported for Internet Mail Clients.

11 Specify the appropriate options.



12 Click **OK**.

13 To modify the search order, click **Set Order**. In the **Directory Services Order** dialog box, modify the search order as required, using the Move Up and Move Down buttons.

14 Click **OK** to save your changes.

15 Click **Close**.

—End—

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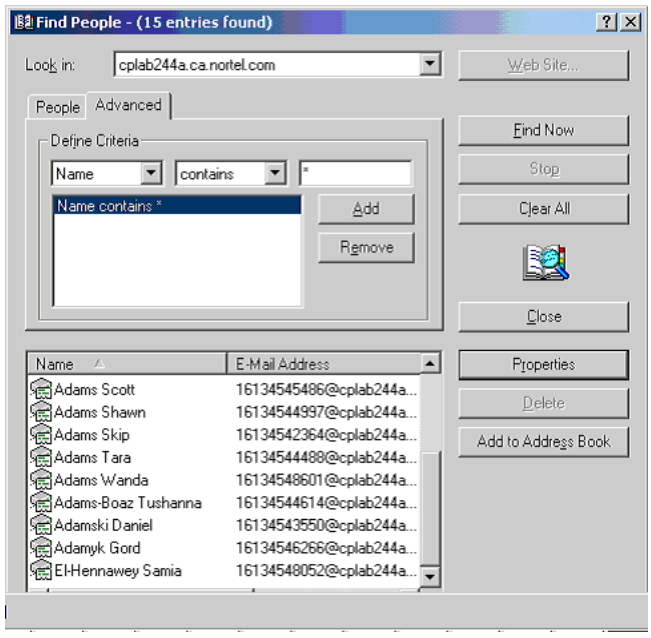
To search a CallPilot directory for names When you search for names in a CallPilot directory, you must use the Advanced tab of the Find People dialog. You cannot search for CallPilot records if you do not use the Advanced tab.

Step	Action
1	To open this dialog box : a. Select the **Addresses** toolbar. b. Choose **Find People** toolbar button. The Find People dialog box appears. c. Click the **Advanced** tab.
2	Choose the **CallPilot directory** you want to search from the **Look in:** list.
3	In the **Define Criteria** section, set up the search you want to conduct by choosing the appropriate values from the drop-down menus and entering the person's name in the text field above **Add**.
4	If the structure of the search is correct, click **Add**. The search string appears in the field below the drop-down menus. The Remove button deletes the search string from this window.
5	Click **Find Now** to run the search. The result appears in the text field at the bottom of the dialog box.



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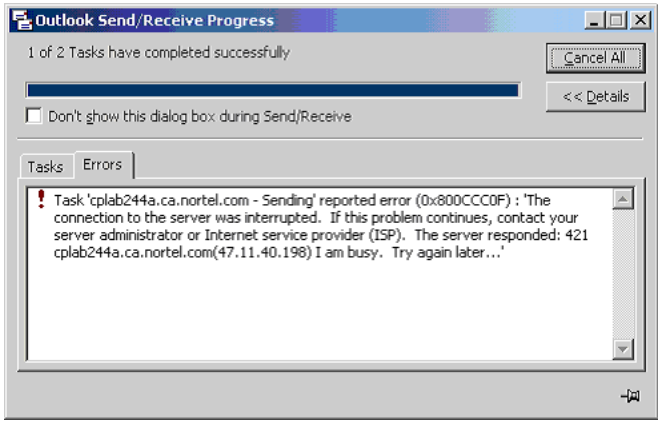
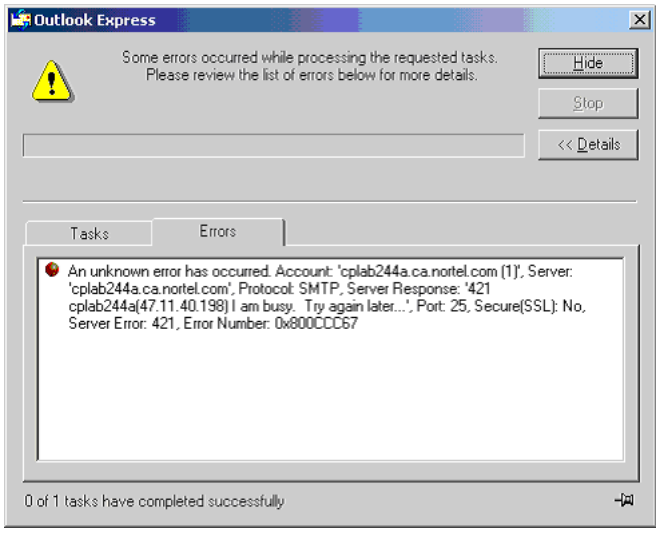
6 Select one or more of the entries returned by the search and add them to your Address Book by clicking **Add to address**.

—End—

Require SSL feature for CallPilot server: CallPilot release 4.0 (and later) supports the Require SSL feature. The server can force the clients to use SSL to connect over IMAP, SMTP, or LDAP.

- If SSL is turned off in Outlook Express for IMAP (to retrieve CallPilot messages) while the Require SSL check box for IMAP is selected on the server side, the connection is rejected.
- If SSL is turned off in Outlook or Outlook Express for SMTP (to send CallPilot messages) while the Require SSL check box for SMTP is selected on the server side, the connection is rejected with an error.





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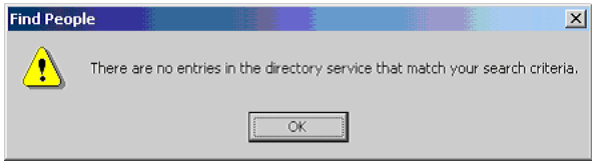
- If SSL is turned off in Outlook Express for LDAP (to download the Address Book) while the Require SSL check box for LDAP is selected on the server side, the connection is rejected.



To configure text formatting

Step	Action
1	If you are using Outlook Express, perform the following steps: a. Choose **Tools > Options**. b. Click the **Send** tab. c. In the Mail sending format section, choose **Plain Text**. d. Click **Plain Text Settings**. The Plain Text Settings dialog box appears. e. In the Message format section, choose **MIME**. f. In the Encode text using list, choose **None**. g. Click **OK**.
2	If you are using Outlook, perform the following steps: a. Choose **Tools > Options**. b. Click the **Mail Format** tab. c. In the Message Format section, select **Plain Text**. d. Click **OK**.
3	If you add addresses from the CallPilot LDAP directory to your Outlook Express personal Address Book, perform the following steps: a. In the personal Address Book, right-click the **recipient name**. On the shortcut menu, click **Properties**. The Properties dialog box appears. b. Click the **Name** tab. c. Ensure that **Send E-Mail using plain text only** is selected.

—End—

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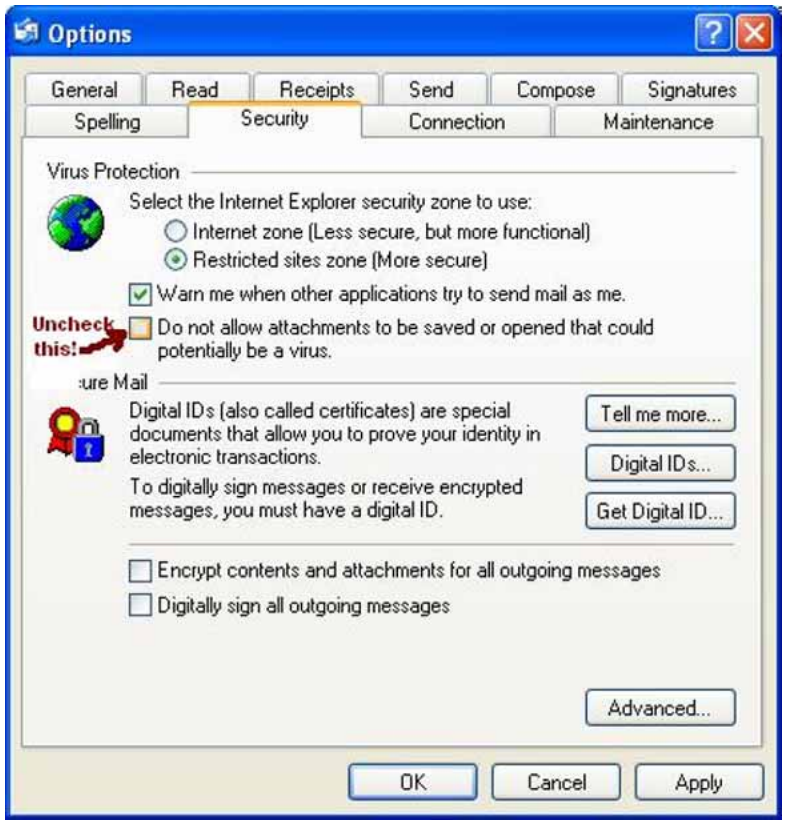
To enable the viewing of faxes If you are using Outlook Express 6.0, complete the following procedure:

Step	Action
1	Choose **Tools > Options**.
2	Click the **Security** tab.
3	Ensure that the check box for the Do not allow attachments to be saved or opened that could potentially be a virus is **not** checked, as shown in the following view:



—End—

To test your Desktop Messaging account

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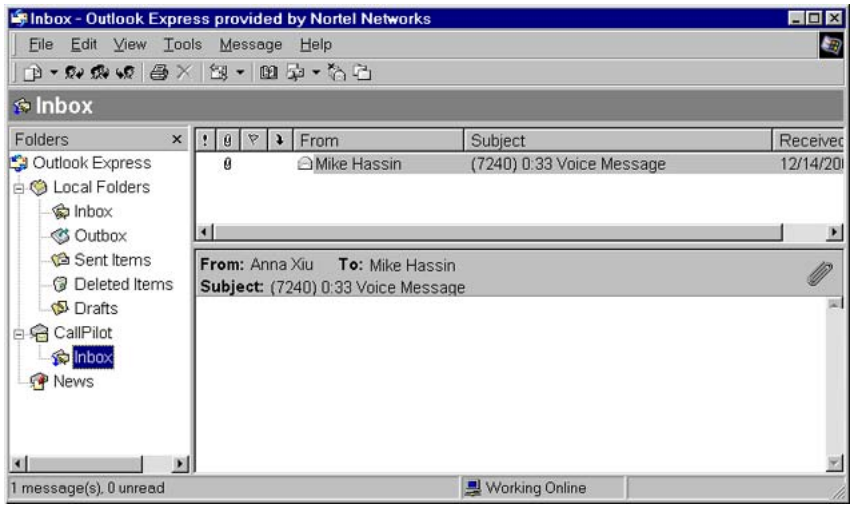
Step	Action
1	Exit and restart your e-mail client to ensure that your new settings take effect.
2	Use your telephone to log on to your CallPilot mailbox.
3	Compose a test voice message and send it to yourself. The message appears in your CallPilot Inbox.



—End—

Section D: Configuring Citrix Thin Clients

This section contains the following topics:

"Configuration overview" (page 109)

"Configuring Microsoft Outlook" (page 109)

"Configuring Lotus Notes" (page 113)

"Configuring Novell GroupWise" (page 114)

"Configuring Internet Mail Clients and My CallPilot for Windows Terminal Server" (page 133)

"Other windows terminal server considerations" (page 129)

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Configuration overview

With Citrix Thin Client support, users can access most of the features of the CallPilot Desktop Messaging client and My CallPilot in a Windows Terminal Server environment running Citrix software. This environment provides a single point of administration for all users in the network.

When the system administrator installs CallPilot on the Windows Terminal Server, users only need to perform minor (if any) configuration changes to use the application.

When CallPilot Desktop Messaging is configured, using CallPilot in a Citrix Thin Client environment is nearly identical to using it in a Standard Desktop Client environment. This includes the ability to change configuration options such as the VPIM network shortcut and CallPilot server name.

One of the few limitations of the Citrix Thin Client environment is that you cannot adjust the client speaker volume and microphone level. Adjusting these settings only affects the Windows Terminal Server. Therefore, the speaker volume and microphone level controls are disabled in the CallPilot Audio Player, CallPilot Form, and CallPilot Configuration.

Configuration differences from the standard Desktop Client environment are detailed in the following sections.

Configuring Microsoft Outlook

When the administrator installs CallPilot Desktop Messaging on the Windows Terminal Server, each Citrix Thin Client user must add CallPilot Desktop Messaging to their client computer's mail profile.

Automatic configuration

Users can automatically add CallPilot Desktop Messaging to their default e-mail profile by choosing **Start > Programs > Nortel > CallPilot Desktop Messaging > Add CallPilot to Default Mail Profile**. This method works for all releases of Microsoft Outlook.

The automatic Outlook configuration is only available when the Windows Terminal Server administrator publishes the Windows desktop. Otherwise, all users must manually configure Outlook.

Manual Outlook 2002 (XP) and 2003 configuration

You can manually add CallPilot Desktop Messaging to any e-mail profile in Outlook.

To manually configure CallPilot Desktop Messaging

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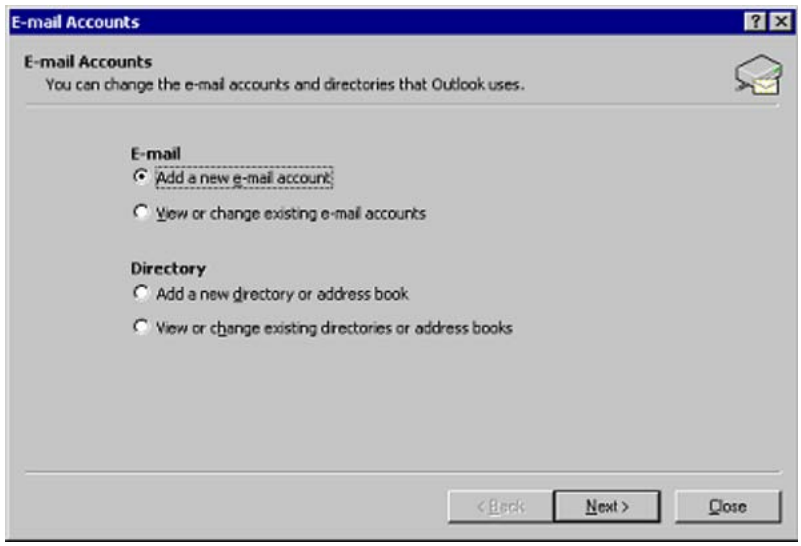
Step	Action
1	Open the mail control panel applet.
2	In the Mail Setup dialog box, click **E-mail Accounts** to add CallPilot to the current e-mail profile, or click **Show Profiles** to choose another profile. If you click Show Profiles, then: a. Select the profile you want to use. b. Click **Properties**. c. Click **E-mail Accounts**.
3	In the E-mail Accounts dialog box, select **Add a new e-mail account** and click **Next**. 
4	Select **Additional Server Types** and click **Next**.

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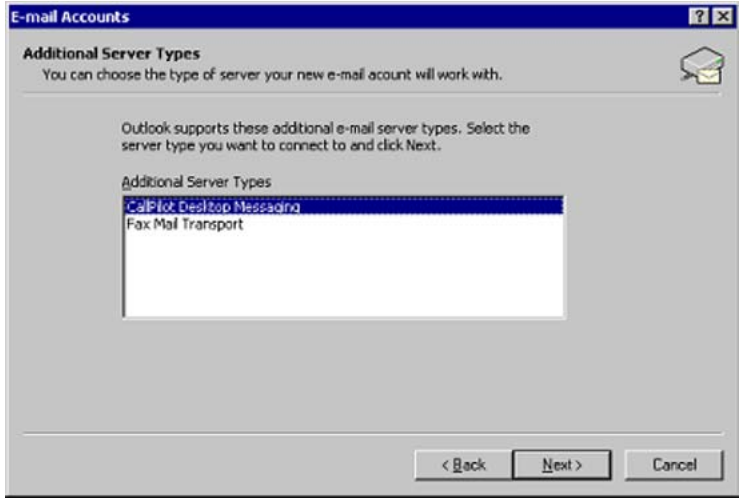
5 Select **CallPilot Desktop Messaging** and click **Next**.



6 Click **Open** in the **Create/Open CallPilot Address Book File** window.

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The default location in the **Create/Open Address Book File** window is set to the user's profile section on the Windows Terminal Server. The location of the user's profile in the default location prevents inadvertent access or overwrite of another user's files.

Nortel does not recommend changing the default location of the Address Book file. If the Address Book location is changed, conflict with other users can occur.

Initially, changing the location of the Address Book file to a location shared by all users can seem worthwhile. The system administrator can then maintain one copy of the Address Book to be shared by all users. However, a shared Address Book can contain entries (SDLs, BDLs, or PDLs) not applicable to all users. While the CallPilot server prevents unauthorized use of Address Book entries, sharing the Address Book file among multiple users can cause confusion.

Because the Address Book files for all users are stored on the same computer, users need to be aware of how secure their data is. The level of security depends on how the system administrator configures the Windows Terminal Server. For more information, see the "Other windows terminal server considerations" (page 129).

7 Click **Open** in the **Click Open in the Create/Open CallPilot Message Store File** window.

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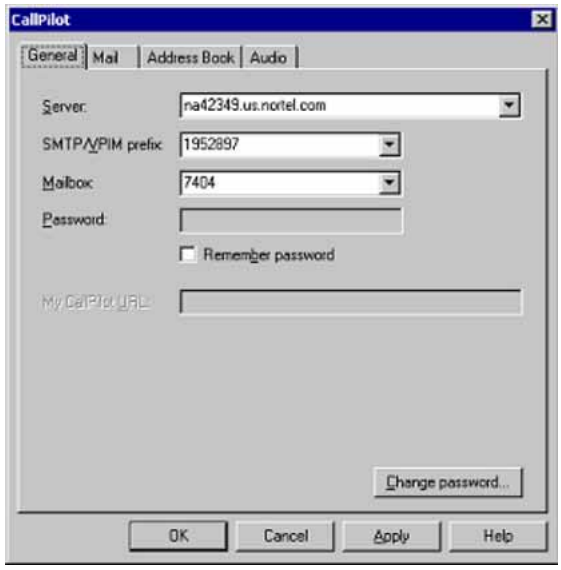
Nortel does not recommend changing the default location of the Message Store file.

8 Enter your **CallPilot Mailbox Number** in the **Mailbox** box and click **OK**.



9 Download the CallPilot Address Book (if prompted).

If you choose to download the Address Book, click **OK** to when the download is complete.

10 Close any remaining windows to complete the configuration.

—End—

Configuring Lotus Notes

The administrator must install CallPilot Desktop Messaging on the Windows Terminal Server and update the mail databases on the Domino server. When this is done, Citrix Thin Client users can run the CallPilot-enabled Lotus Notes client.

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When Lotus Notes client starts for the first time after server configuration is complete, CallPilot Desktop Messaging detects the updated mail database, makes all required modifications in the Lotus Notes client initialization file (NOTES.INI) and prompts the user to finalize the configuration by restarting the Lotus Notes client.

Configuring Novell GroupWise

The administrator must first install CallPilot Desktop Messaging on the Windows Terminal Server. When this is done, each Citrix Thin Client user must add CallPilot Desktop Messaging to their client computer Novell Default Settings mail profile.

Automatic configuration

Users can automatically add CallPilot Desktop Messaging to their Novell Default Settings mail profile by choosing **Start > Programs > CallPilot Desktop Messaging > Add CallPilot to Default Mail Profile**.

The automatic Novell GroupWise configuration is only available when the Windows Terminal Server administrator publishes the Windows desktop. Otherwise, all users must manually configure Novell GroupWise.

Manual configuration

Users can manually add CallPilot Desktop Messaging to their Novell Default Settings mail profile.

To manually configure CallPilot

Step	Action
1	Log on to Novell GroupWise.
2	Open the **Address Book**.
3	Choose **File > Services**.

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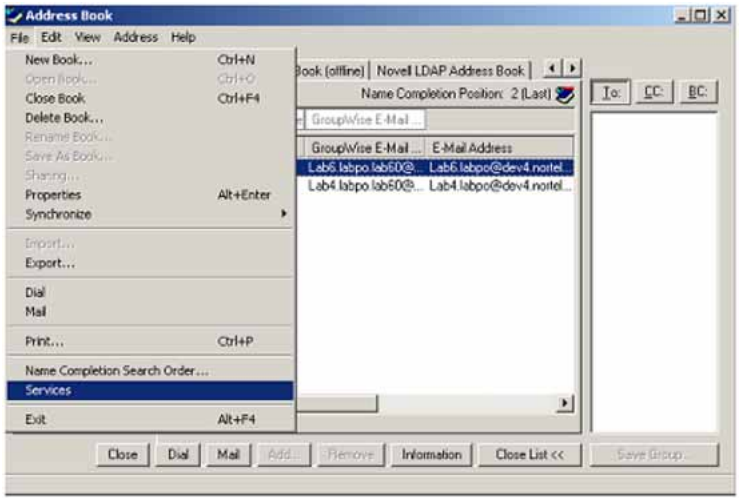

4 The Novell Default Settings Properties window appears. Select the services you want to configure.

5 When configuration is complete, close and restart GroupWise.

—End—

Section E: Configuring Fax Services

This section contains the following topics:

"Fax outcalling administration" (page 116)

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"Monitoring disk space usage" (page 116)

"ImageMaker Cover Page Template Designer and Previewer" (page 117)

"Using the ImageMaker Template Designer" (page 118)

"Using the ImageMaker CoverPage Previewer" (page 124)

Fax outcalling administration

The CallPilot administrator can set up the Economy Delivery schedule from **CallPilot Manager/Messaging/Outcalling Administration**. In the **Delivery to Fax** section, choose a schedule for Economy delivery. Typically, Economy Delivery is used during business off-hours, when message traffic is lower and long-distance charges are reduced.

Monitoring disk space usage

Every voice or fax message stored on the CallPilot server consumes disk space. With daily usage you can run low on disk space. Therefore, Nortel recommends that you periodically monitor the disk space usage for the following reasons:

- Usage by this feature becomes excessive with faxes sent to CallPilot mailboxes.
- Low disk space alarms can be triggered when a high volume of faxes are in the outgoing queue simultaneously.

The Channel Usage Report must be run periodically to determine the impact of the Fax Batch feature on the system. You can run this report from CallPilot Reporter, under System Reports. If your users generate a high volume of fax messages, Nortel recommends that you set appropriate

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levels in your Min/Max tables to prevent outgoing message from congesting outbound channels. The Min/Max tables allow administrators to control the number of incoming and outgoing channels.

To understand how these work, the following example is provided.

At the server, the Message Transfer Agent scheduler fulfills a fax delivery request in different ways, depending on the set configuration. For example, if your server is keycoded for ten fax ports and in the Outcalling Administration page of CallPilot Manager (under DTF), the number of recipients required for fax broadcast is set to two. If you then send a fax to 24 recipients, the scheduler lets the first ten deliveries to utilize the maximum of ten fax ports. Following those, the remaining 14 faxes are delivered through a maximum of two fax ports, because the MTA scheduler now considers this a fax broadcast. If higher delivery performance is required, the number of ports used for fax broadcast can be increased using the CallPilot Manager application.

ImageMaker Cover Page Template Designer and Previewer

The customizable fax cover page feature provides an easy way to create and manage custom fax cover pages from the CallPilot Desktop Messaging custom form and the Nortel fax printer driver.

The CallPilot Desktop Messaging installation CD-ROM contains a separate folder with the ImageMaker Cover Page Template Designer and Previewer software. The administrator uses this software to build and manage the custom cover pages. This section provides basic instructions on using these third-party applications, and then using the generated fax cover pages when sending a fax from CallPilot. See the Help section of the applications for additional information.

Using a customized set up, the system administrator can point all end users to a shared network folder that contains the cover pages.

Introduction

The ImageMaker cover page, Template Designer, and CoverPage Previewer applications are used to produce run-time fax cover pages from within the CallPilot application. This is accomplished by combining three components: a Base Image, a Template, and User-supplied Data.

The cover pages are created on demand by layering the User-supplied Data on top of the Base Image, following the rules defined in the template. The final cover pages are created as CCITT Group 3 TIFF images, DCX fax images, or PCX images.

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Template Designer

The cover page Template Designer application provides a graphical interface for creating cover page Templates. The cover page Template is a file that describes the type and placement of variable user data. The variable user data is layered on top of a cover page Base Image, when you create a fax cover page.

CoverPage Previewer

The CoverPage Previewer application lets you preview the actual faxable cover page by combining a cover page Base Image, a cover page Template, and the User-supplied Data.

Using the ImageMaker Template Designer

Overview

The Template Designer application (SHIP32.EXE) is used to create or modify cover page Templates. The SHIP32.EXE application file is on the CallPilot Desktop CD-ROM in the \imgmaker folder. This entire folder must be copied to your local system hard drive.

A cover page Template file (*.CVR) is always associated with a cover page Base Image (*.TIF) through its filename. For example, Template file COVER1.CVR is associated with the Base Image file COVER1.TIF. When you open a Template file with the Template Designer, the associated cover page Base Image is automatically loaded. The template fields defined in the Template file are then layered upon the Base Image.

Creating a new cover page Template file

Before you create a new cover page Template file you must first have a Base Image file on which to layer the template fields. A cover page Base Image is obtained by copying an existing Base Image file, or by creating an entirely new one. A cover page can be designed in any word processing, paint, or drawing program. When the design is finished, print it using the Nortel Fax Printer to produce the Base Image file in the required TIF format.

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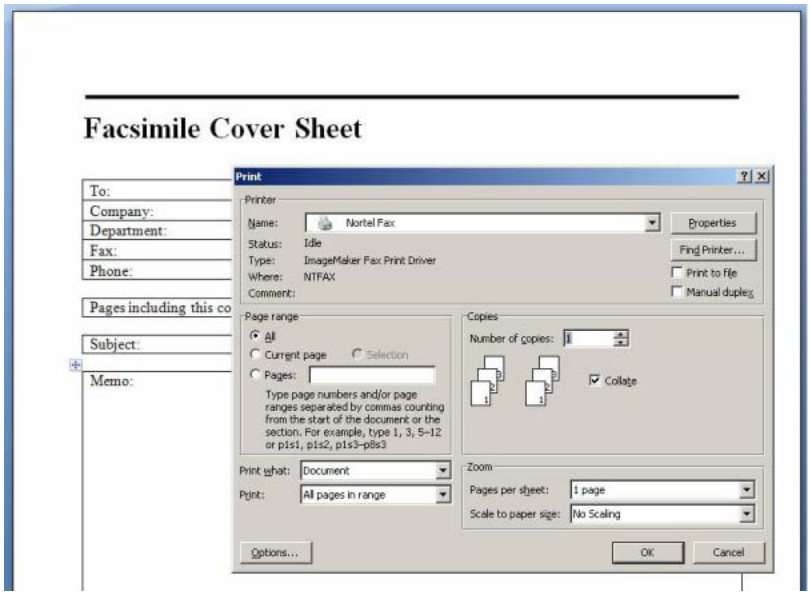
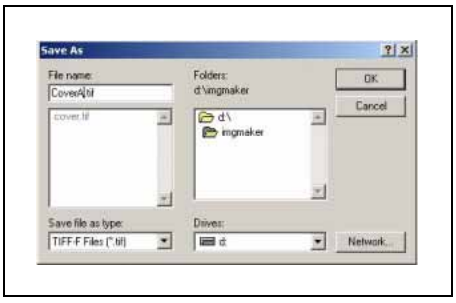


This must be saved to the \imgmaker folder that you copied to your local system's hard drive.



To create a new cover page template file

Step	Action
1	When you have an appropriate Base Image file, start the SHIP32.EXE application. The main interface window appears.

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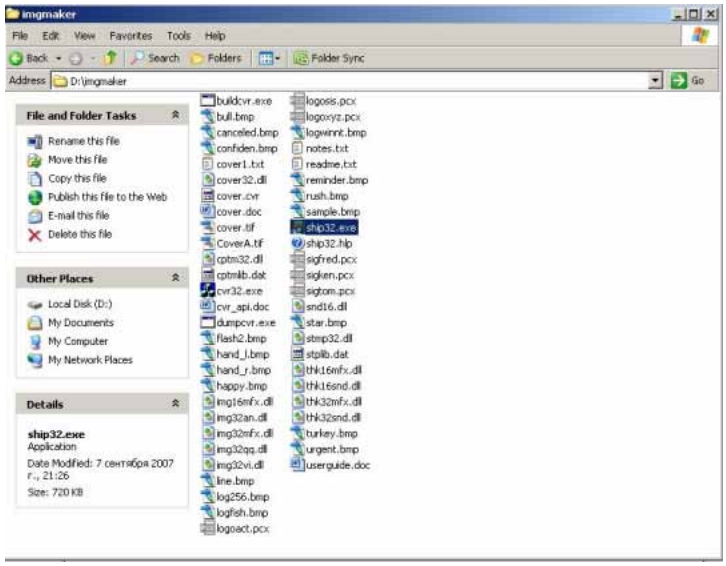
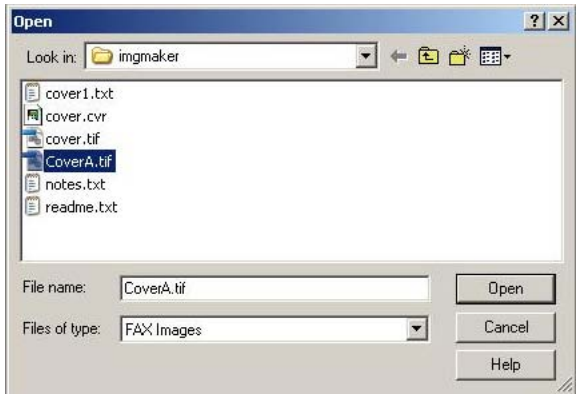


2 Click on **Open** in the Template Designer File menu to select and open the desired cover page Base Image file (example shown: CoverA.tif).



3 Select the **Template Field Tool** on the main toolbar. The Template Field Tool is used to add the template fields that overlay the Base Image.

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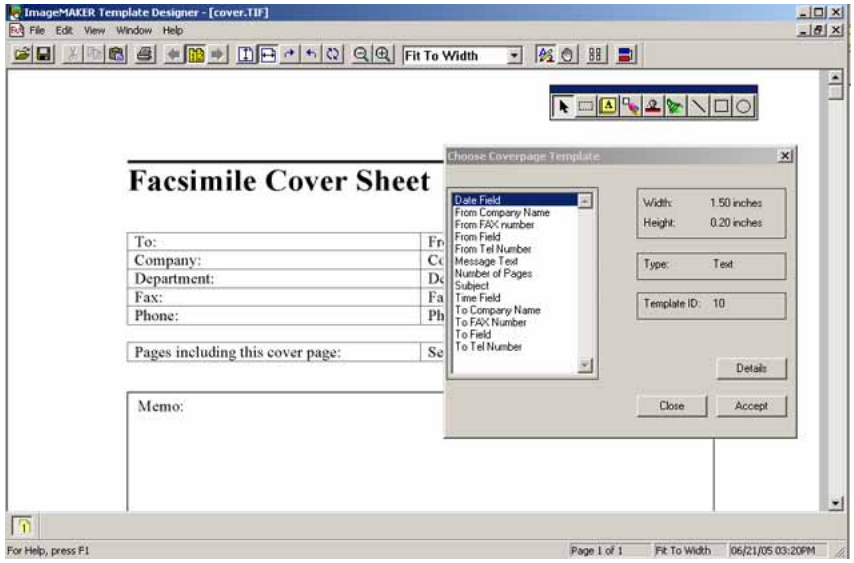

When you select this tool, the Choose Coverpage Template dialog box appears. In this dialog box, you can choose which template fields to add from the displayed list.

4 Choose the particular template field from the list that you want to add for overlaying onto the Base Image (the To FAX Number field was chosen for this example). You are automatically returned to the main window, and the cursor appears.

5 Use the cursor to create a dotted rectangle to outline the size and placement of the new template field. Place the cursor over the FAX field area on your Base Image, and click the mouse to position the template field. **Click and drag** the outlining rectangle to create the desired size of the field. Note that the box can easily be repositioned or resized after you create it.

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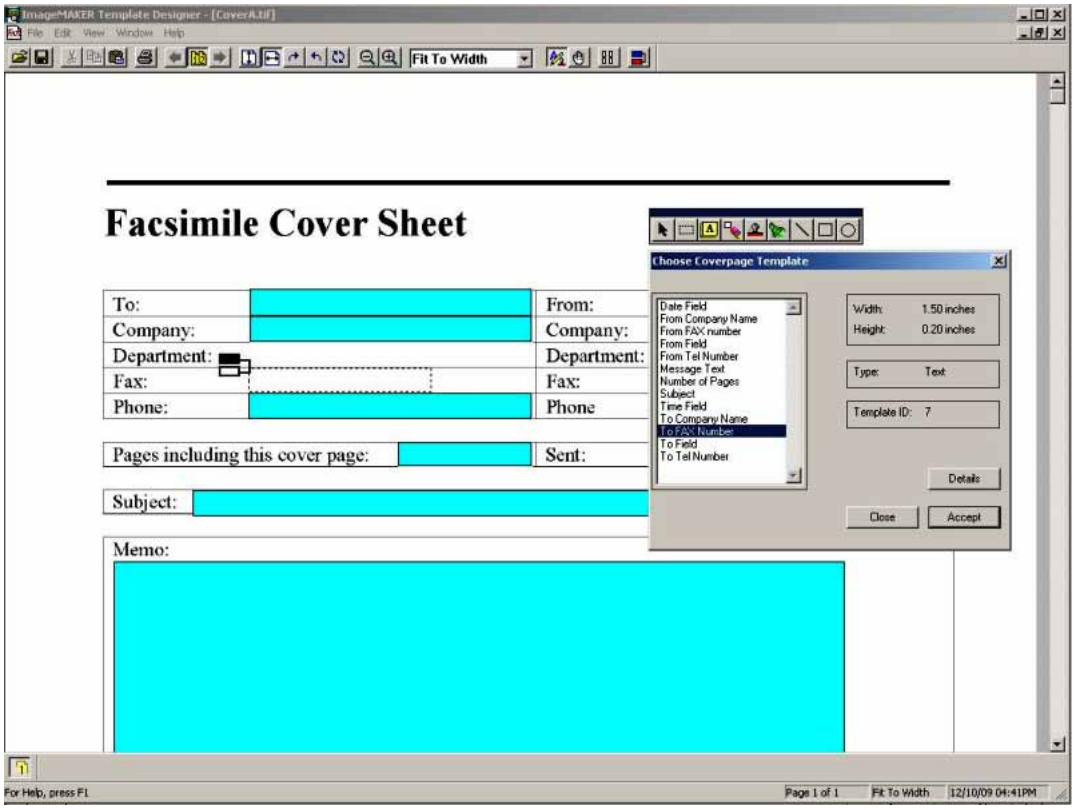
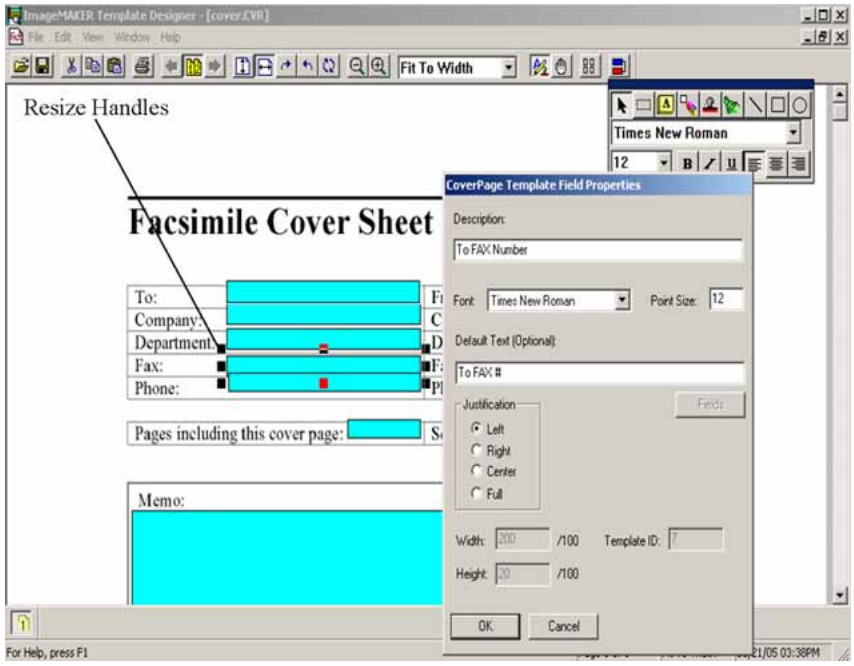


6 When a new template field is in place, shows up as a blue box with the descriptive text name inside the template field.



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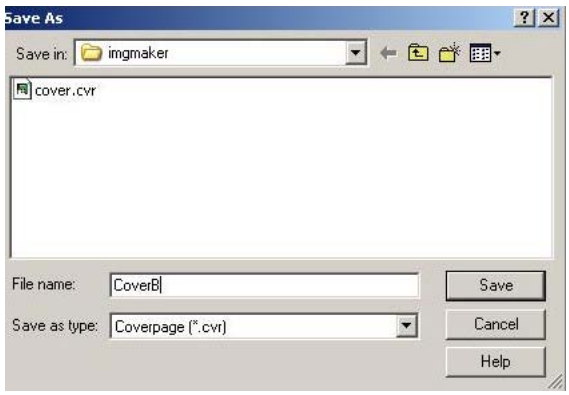
You can change the descriptive text in the template field by right-clicking the cursor inside the blue box, and then selecting Properties. This opens the CoverPage Template Field Properties window. In the example shown, the descriptive text To Fax Number in the blue box is shortened to **To Fax #**. Template fields can also be resized and moved by single-clicking on the desired field and dragging the entire box, or dragging one of the resizing handles.

7 When you have finished adding the template fields you require, you must save the Template file. Click the File item in the main menu, and select Save As. The Save As dialog box appears.



You must ensure that the Save as type field is set to Coverpage (*.CVR). Additionally, the filename you enter must be not the same as the filename of the Base Image (for example if the Base Image you open is CoverA.TIF, then the filename you enter here for the template is CoverB.CVR).

Note: The .CVR file must be saved to the \imgmaker folder that you copy to your local system hard drive.

—End—

Modifying an existing cover page Template file

You can modify an existing cover page Template by opening the appropriate *.CVR file in the Template Designer and making any modifications to the template fields. The process is the same as described in creating a new page template.

However, an existing CVR file (and its associated Base Image file) you want to modify must first be copied to the \imgmaker folder that you copied to your local system hard drive (also where CVR32.EXE resides). This is a requirement of the Template Designer and Previewer applications.

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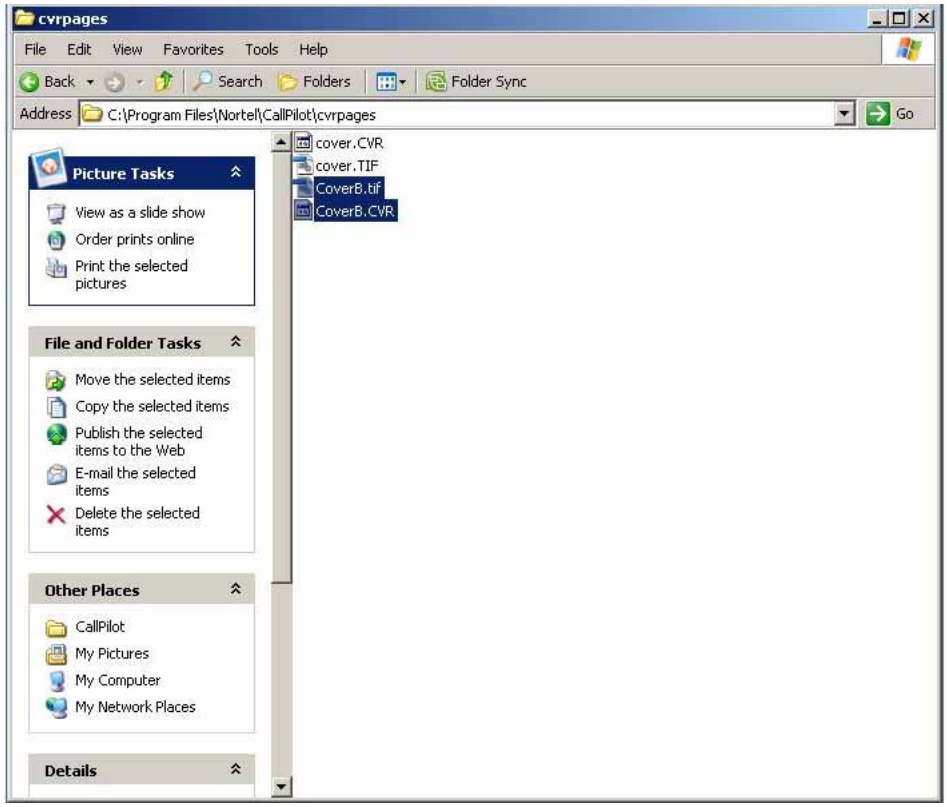
When you make your changes and preview them, save them. You can then copy the Template and Base Image files back to the proper folder location, where the Template and Base Image files are picked up by the CallPilot Desktop application. The folder location is usually C:\Program Files\Nortel\CallPilot\cvrpages.



Using the ImageMaker CoverPage Previewer

Overview

The CoverPage Previewer application (CVR32.EXE) is used to preview a fax cover page by merging a selected Base Image file, the associated Template file, and some User-supplied Data. You can then preview the resulting cover page by pressing the Preview button. The application is not used to send a fax, but to verify the appearance of your cover page design and the placement of the variable text fields onto the fax.

The CVR32.EXE application file is on the CallPilot Desktop CD-ROM in the \imgmaker folder. This entire folder must be copied to your local system hard drive.

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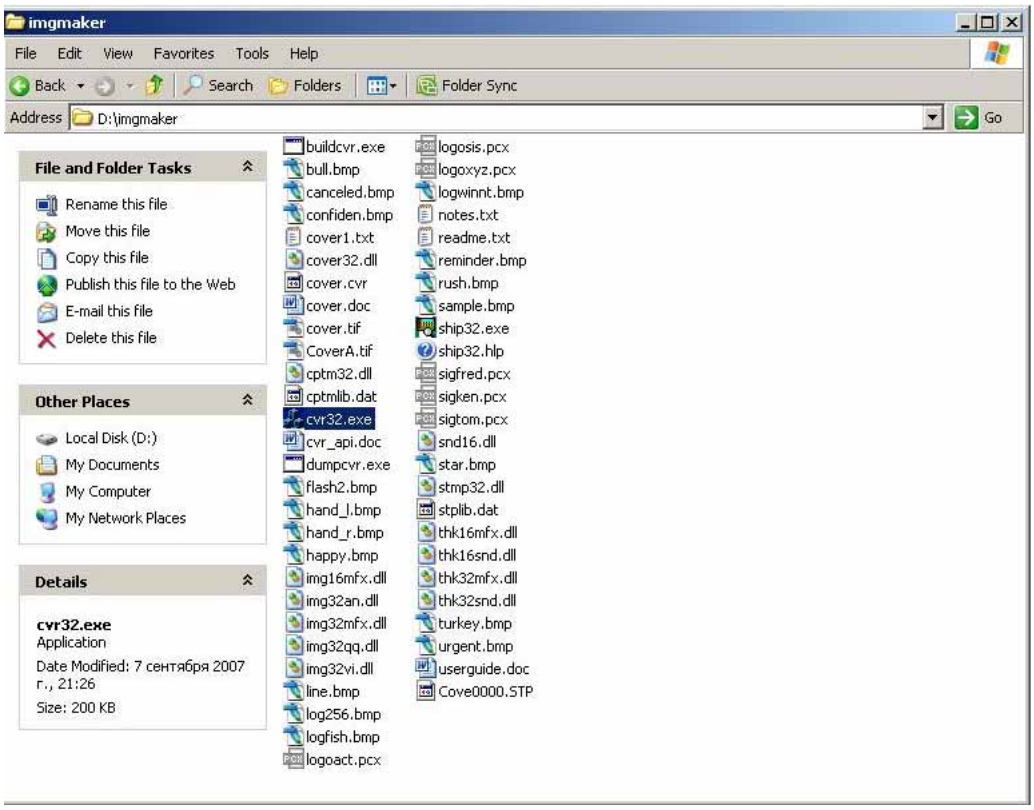

To Preview a fax cover page

Step	Action
1	**Open** the CVR32.EXE application. The main window appears.
2	Enter the variable data in the **From, To, Subject**, and **Message** fields. When you preview the fax cover page, CVR32.EXE takes this data and merges it with the Template fields for layering on the Base Image.

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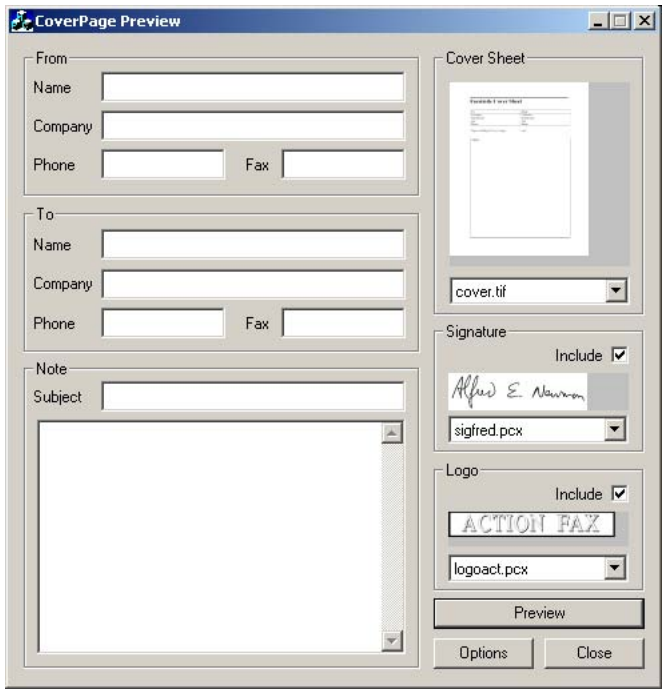

3 Select the Base Image you want to use from the Cover Sheet selector at the top right of the window. Use the arrow buttons to scroll through the previews of the available types (if you have more than one cover sheet) until you find the cover sheet you want. CVR32.EXE uses the file name of the selected Base Image to find the matching Template file. For example, if the Base image file you select is CoverB.TIF, then the application uses CoverB.CVR as the associated Template file.

Note: The Signature and Logo selectors are not used in the current CallPilot implementation of this third-party application. If you want a corporate logo and a signature to appear on your fax cover page, add the signature and logo to the design of your Base Image file.

4 Click Preview to see what the final fax cover page looks like. If you are satisfied with the results, press OK. If you want to change any of your selections, you can go back to creating a new cover page template, make the changes to your cover page and then Preview the image again.

Note: If you saved the template with a filename that does not start with the cover string, then you must go to **Options** and change the wildcard settings for **CoverSheets WildCard** from **cover*.TIF** to *.**TIF** to see your filename listed in the **File List**.

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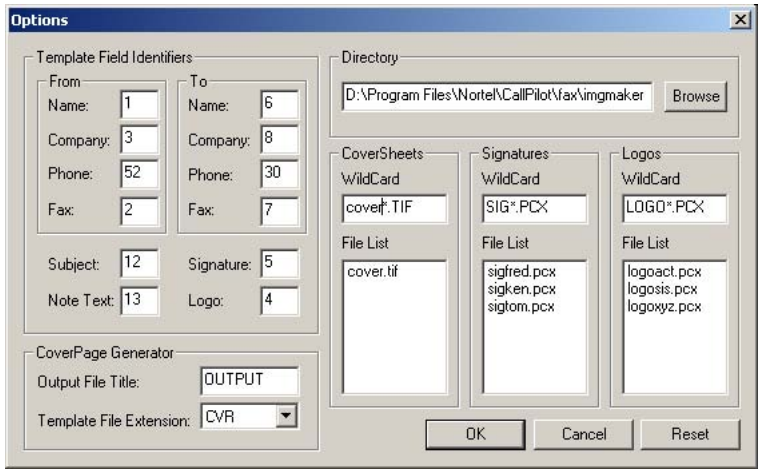

—End—

Using your custom cover pages when sending faxes

You can fax a document from any program that produces printable files. If you want to use the custom cover pages you create, the Template files (*.CVR) and Base Image Files (*.TIF) must first be copied from the \imgmaker folder. The \imgmaker folder, that you copied to your local system hard drive, is picked up by the CallPilot Desktop application. The usual location is C:\Program Files\Nortel\CallPilot\cvrpages.

To use your custom cover pages when sending faxes

Step	Action
1	Select **File** and then **Print** from the application you are using to create the document you want to fax.
2	Select the **Nortel Fax Printer** as your printer type, and press **OK** to open the Compose Fax window.

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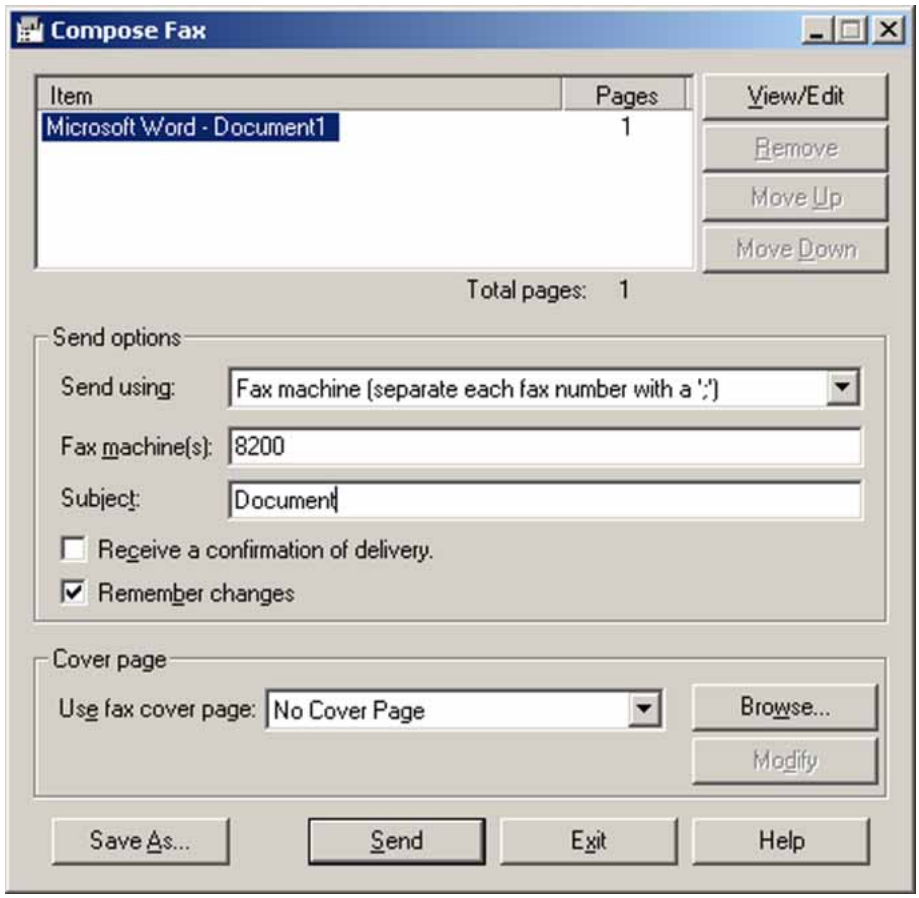

3 Enter the Fax machine number to which you want to send the document in the Send options field.

4 Enter appropriate text in the Subject field.

5 Check the **Receive a confirmation of delivery check box**, if desired.

6 Select the cover page Base Image file you want to use from the Use fax cover page field and the **Browse** button.

7 Click the **Modify** button to open the Modify Cover Page window.

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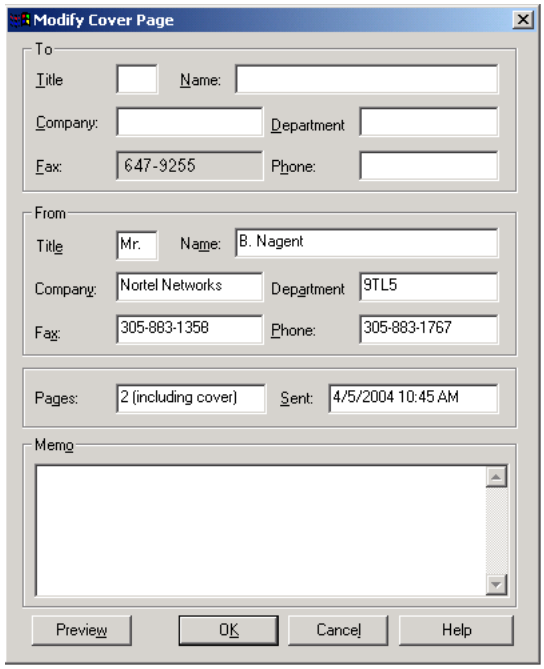

8 Enter your addressing data into the blank fields. The Memo field is used to add a text message for your recipient onto the cover page. Note that the recipient's Fax number field is grayed out because this data was entered in the previous window.

9 You can preview the fax by clicking on the **Preview** button. You select the Base Image file and associated Template file, ImageMaker merges the information and produces the final cover page.

10 If you are satisfied with the results, press the **Send** button to send the fax. The cover page is placed in front of the document you are sending.

—End—

Other windows terminal server considerations

Security

In a Windows Terminal Server environment, all software and support files are stored on the Windows Terminal Server. Files that store user-specific information are stored in the user profile section of the Windows Terminal Server.

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Unlike the standard desktop environment, the user cannot control file-level access privileges to these support files. Ideally, the Windows Terminal Server system administrator sets the appropriate privileges to prevent unauthorized access. However, users who wish to have a higher level of security can take additional steps.

Note that Novell GroupWise and Lotus Notes users do not need to be concerned with these additional steps. The design of the Novell GroupWise and Lotus Notes clients prevents unauthorized access to user specific information. These additional steps pertain to Microsoft Outlook users only.

Password Protect CST Files CST files are used by CallPilot Desktop Messaging for Microsoft Outlook to store CallPilot message headers and downloaded messages. If another user opens the CST file in offline mode, they can access all messages previously played or viewed.

To prevent unauthorized access, users can password protect their CST files. This ensures no one (including the system administrator) can access previously played or viewed messages without first entering the user-defined password.

To password protect a CST file

Step	Action
1	Open CallPilot Configuration, and select the **Mail** tab.

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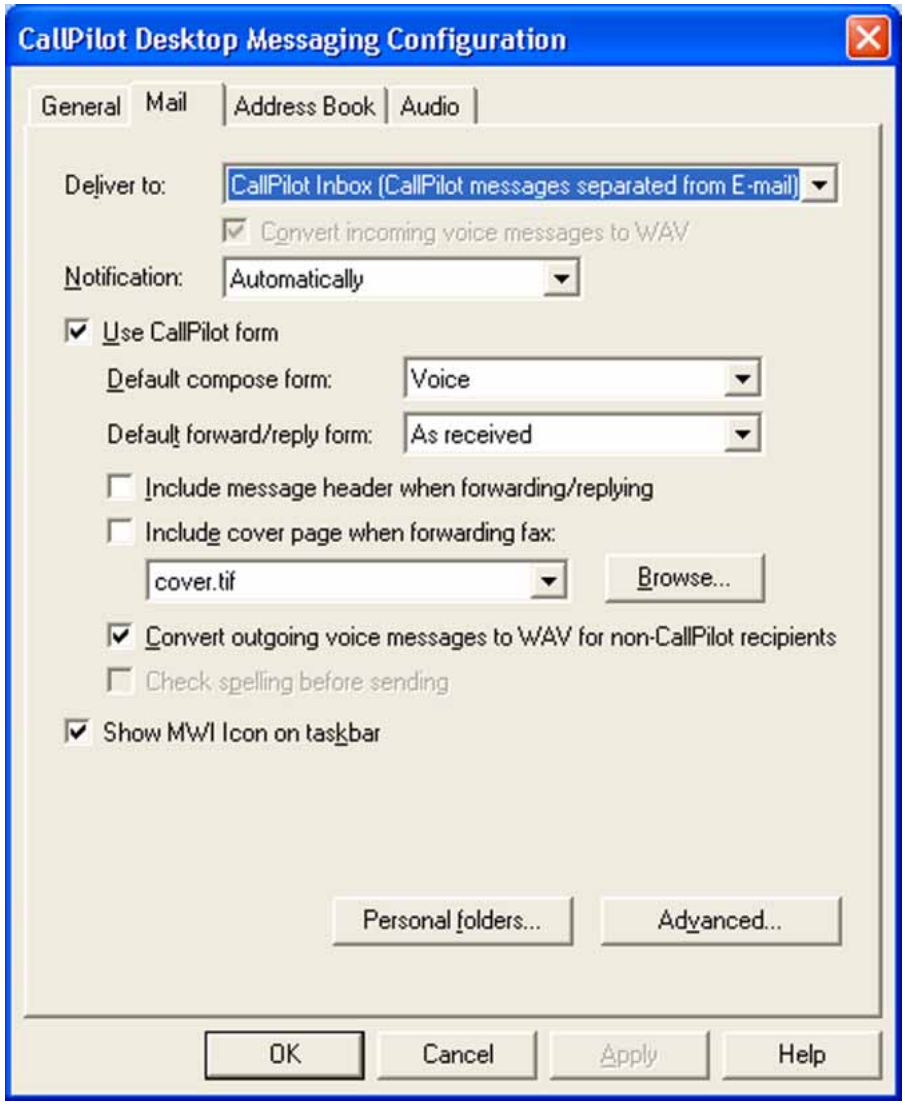

2 Press the **Personal folders...** button, and then press **Change Password...**.

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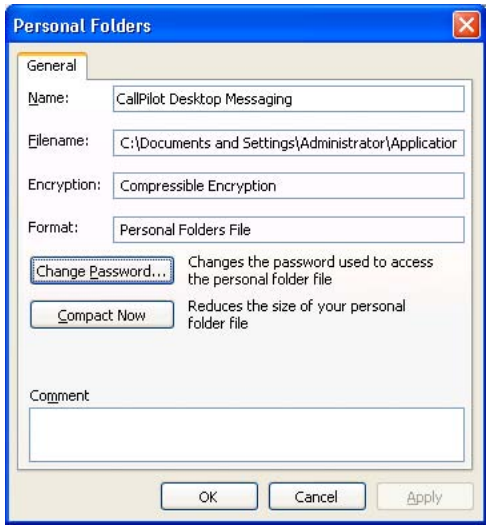

3 Enter the old password (if necessary) and new password.

To ensure the highest level of security, do *not* select the **Save this password in your password list** option.

—End—

This solution protects voice, fax, and text messages from unauthorized access on the Windows Terminal Server.

Playing messages through the telephone To improve network performance, CallPilot Desktop Messaging caches voice messages played through the computer. However, other users can play these cached messages if they have access to your CST file. Users can prevent voice messages from being cached by playing them through their telephone. When messages are played through telephone, voice data is not downloaded or saved on the Windows Terminal Server.

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This solution protects voice messages from unauthorized access on the Windows Terminal Server. Text and fax messages are still downloaded and saved on the Windows Terminal Server.

Configuring Internet Mail Clients and My CallPilot for Windows Terminal Server

Configuring Internet Mail Clients The administrator must install CallPilot Desktop Messaging - Internet Mail Clients (Audio Player only) on the Windows Terminal Server. When this completes, Internet Mail Clients can follow the same instructions for using CallPilot as standard Windows environment users.

Configuring My CallPilot Users The administrator must install CallPilot Desktop Messaging - Internet Mail Clients (Audio Player only) on the Windows Terminal Server. When this completes, My CallPilot users can follow the same instructions for using CallPilot as standard Windows environment users.

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Chapter 7
Installing My CallPilot on a server

My CallPilot requirements

Servers

- My CallPilot 5.0 supports CallPilot 2.5, 3.0, 4.0, and 5.0 servers.
- My CallPilot 5.0 does not support logon to CallPilot 2.02 and earlier servers.
- Support for Macintosh OS X and Redhat 9 Linux requires My CallPilot 5.0.
- You can install My CallPilot on the CallPilot server or on a separate Web server. For optimal performance, Nortel recommends you use a separate Web server dedicated only to My CallPilot applications. You can install My CallPilot on the same stand-alone Web server as CallPilot Manager and CallPilot Reporter.
- You need approximately 50 MB of disk space for My CallPilot. Nortel recommends an additional 100 MB after installation for temporary files.
- The Web server must be connected to the customer LAN and not to the CallPilot ELAN subnet. Most client/server communications use HTTP and the intermediary Web server. In this way, you can deploy My CallPilot across your company firewall to the Internet, with the option of using a third-party certificate authority for HTTPS support.
- My CallPilot requires one of the following:
  - a Microsoft Internet Information Server 5 on Windows 2000 Server SP1 and later (only the standard version is supported)
  - a Microsoft Internet Information Server 6 on Windows 2003 (only the standard version is supported)

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

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CAUTION
Do not download and install IIS security patches from the Microsoft Web site unless they are approved for CallPilot by Nortel. Installation of unapproved security patches can result in incorrect operation of your CallPilot system.

To determine which patches are approved by Nortel, see the latest issue of the Distributor Technical References bulletin.

Server configuration

Ensure that the CallPilot server is properly configured before you begin My CallPilot installation.

ATTENTION
Be prudent when locking down a My CallPilot Web server. Windows 2003 lets administrators control the security configuration of their server and of the IIS. Some configurations can limit or impact My CallPilot functionality. During installation, My CallPilot configures IIS and the operating system allowing it to function correctly. However, changes that restrict access or permissions to directories or IIS can prevent My CallPilot from functioning correctly.

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 "Controlling access to features" (page 31).

For information about Web server security, see Chapter 8 "Additional server configuration" (page 149).

User workstation requirements

My CallPilot clients require the same hardware as Desktop Messaging. See "Workstation requirements" (page 64).

Web browser requirements

My CallPilot supports the following Web browsers:

- **For Windows**: Microsoft Internet Explorer 6.0 and 7.0, Mozilla Firefox 2.0 for Windows

  Internet Explorer is the recommended browser for Windows users.
- **For Macintosh:** Safari 1.x for Macintosh OS X
- **For Linux:** Mozilla 1.7.x, Mozilla Firefox 2.0

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Note 1: 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 cannot compose, send, or reply to voice messages. In addition, Mac OS X users cannot use CallPilot Player and Fax Viewer.

Note 2: 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	• 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
View online guides in PDF format	Adobe Acrobat Reader

Additional notes about My CallPilot use with other supported browsers

- **For the Mozilla Firefox browser on Windows:** Audio players, including CallPilot Player, are supported only as stand-alone applications that open in a separate window; they do not appear directly on the My CallPilot page. You must run the stand-alone audio player to record messages and greetings, and then import them into My CallPilot.
- **For the Macintosh Safari browser:** You can listen to WAV audio files using QuickTime Player, and view faxes using the picture viewer included in the Macintosh operating system; however, no CallPilot (VBK) audio player or fax print driver is provided. Software for recording WAV audio files or creating TIFF fax files is not included with My CallPilot.
- **For Linux browsers:** You can listen to WAV audio files using any audio program that can play WAV files (such as Audacity, Totem, or XMMS players) and view faxes using an imaging program (such as QFaxReader or GIMP); however, no CallPilot (VBK) audio player or fax print driver is provided.

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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.

Preparing for My CallPilot installation

Before you install CallPilot Web applications, ensure that you meet the following requirements:

- you have all of the information you need in the preinstallation checklist
- an operational version of IIS 5 or IIS 6 is installed on the server
- you removed previous versions of My CallPilot from the IIS server

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

To uninstall My CallPilot

Step	Action
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 uninstall MyCallPilot again.

—End—

To install My CallPilot

This procedure is performed in conjunction with the IS administrator.

Step	Action
1	Log on to your server with administrator privileges.
2	Insert the CD containing the My CallPilot software.

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3 Browse to the **setup.exe** file, and then double-click it.

Result: The Welcome window appears.

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

For information about a specific option, see the online Help.

—End—

My CallPilot server setup

As a final step, you must update the CallPilot server settings and enable or disable SSL encryption for communication with the CallPilot server. Run the My CallPilot Administration Utility as described in the following procedure.

My CallPilot Administration Utility

Overview

The My CallPilot Administration Utility is a tool for updating CallPilot server settings, and for enabling and disabling SSL encryption for communication with the My CallPilot Web server. All entries are stored within the system registry.

The My CallPilot Web server cannot automatically detect changes to CallPilot server settings. If you use CallPilot Manager to change CallPilot server settings that impact My CallPilot, you must use this administration tool to update the settings on the My CallPilot server. These settings include:

- the CallPilot server FQDN
- the VPIM network shortcut
- the LDAP search base
- the LDAP port number

To start the My CallPilot Administration Utility

From the Windows Start menu, choose **Program Files > Nortel My CallPilot > My CallPilot setup**. The My CallPilot Administration Utility dialog box appears.

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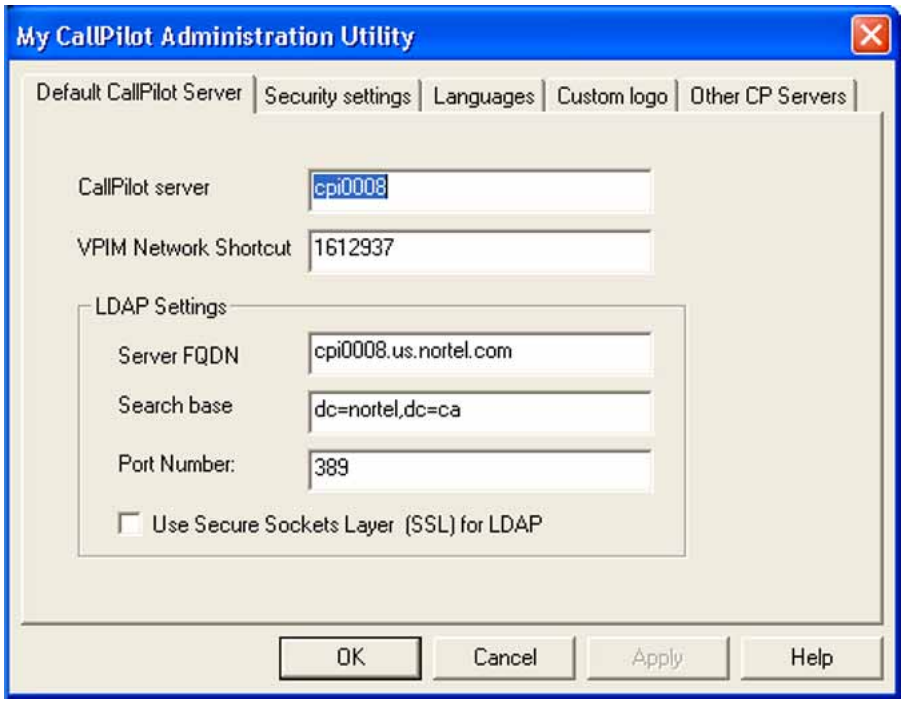

For details about the any of the available options, click the **Help** button.

Allow users to send voice messages to non-CallPilot recipients

For CallPilot server release 3.0 and later

With this feature, the system administrator can control the distribution of CallPilot voice messages outside the organization. When cleared, the user cannot save or forward audio attachments or voice messages to non-CallPilot recipients.

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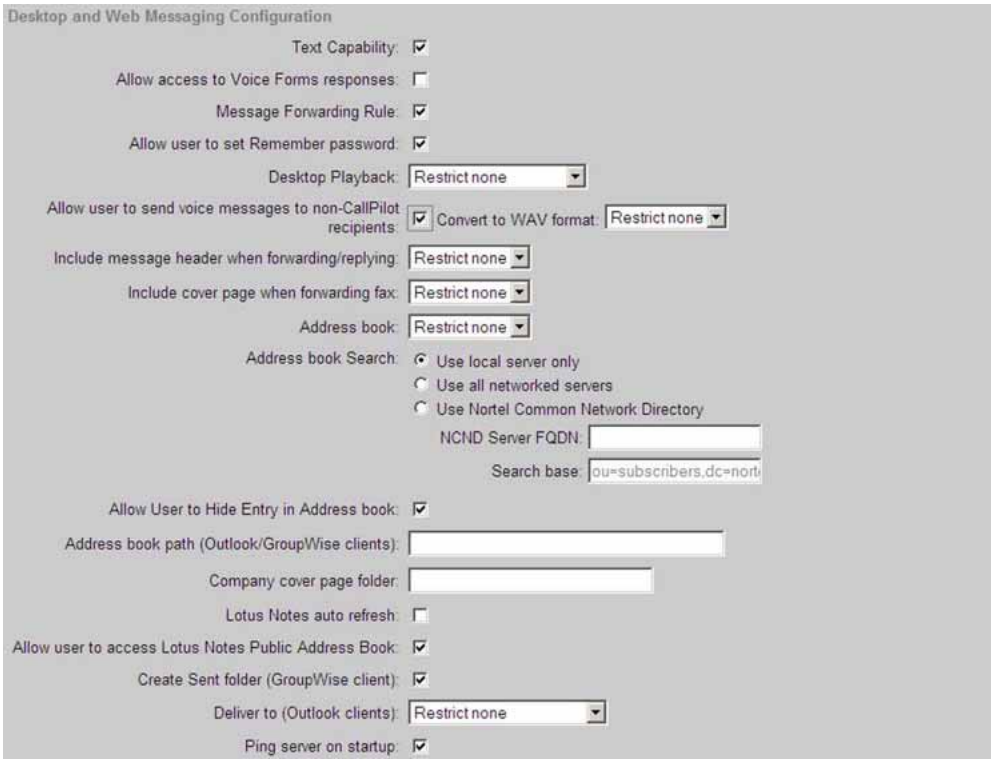

Note: If the user attempts to forward a message to a non-CallPilot recipient using the standard e-mail form of Microsoft Outlook and the message appears to have forwarded properly but the recipient of the message only receives the VBK header then the audio data is not sent, and the message cannot be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

To allow users to send voice messages to non-CallPilot recipients

Step	Action
1	Select the applicable **User Class** to access the control for this feature.
2	Select the **Allow user to send voice messages to non-CallPilot recipients** check box.
3	Click **Save**.

—End—

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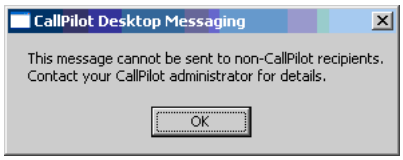
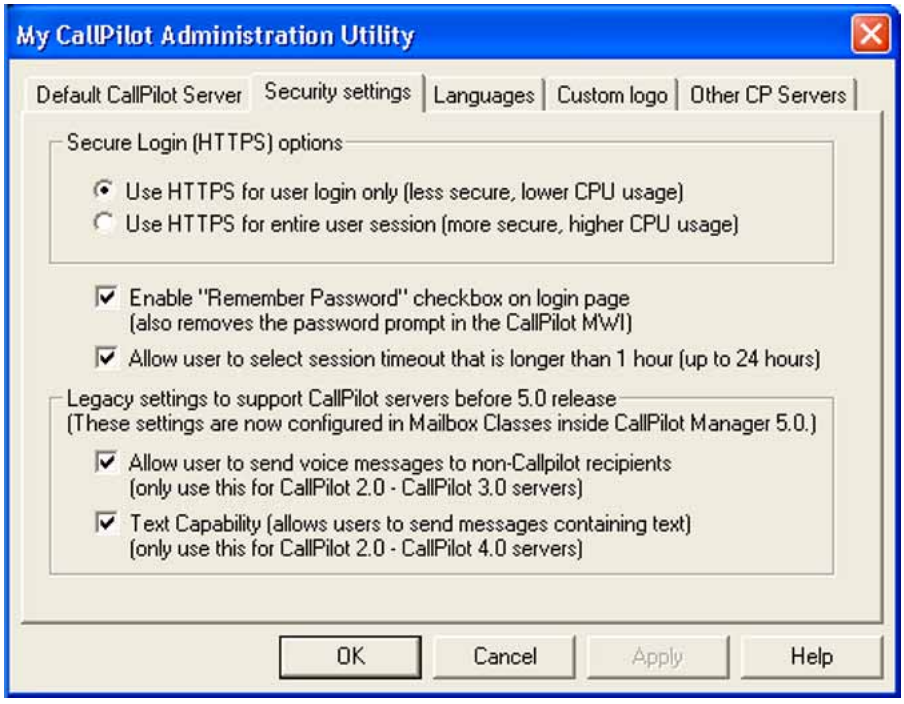
If you do not select this feature, the user cannot forward voice messages to non-CallPilot addresses. However, the user still can forward voice message to addresses in CallPilot format.



Note: This feature does not block users from forwarding voice messages to an external e-mail account if they use Internet IMAP clients.

For CallPilot server release 2.X

With Voice Block, the system administrator can control the distribution of CallPilot voice messages outside of the organization. This feature is intended for use only by the system administrator. The end user cannot enable or disable this feature.



Note: This feature is used when My CallPilot interfaces with CallPilot 2.X software only. In CallPilot 5.0, this feature is no longer configured in the My CallPilot Administration Utility. Instead, it is configured using CallPilot Manager in the Mailbox Class property page, in the Keycoded Features section. See the CallPilot Manager online Help for details.

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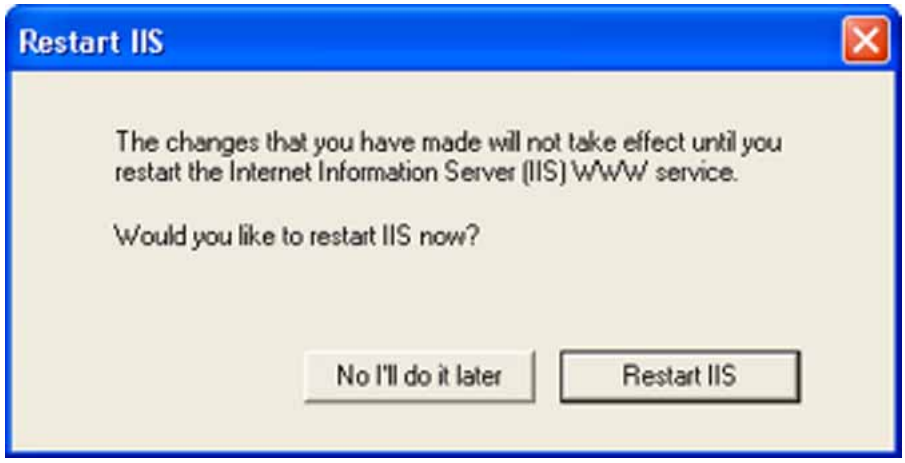
To enable My CallPilot Voice Blocking (CallPilot server 2.x)

Step	Action
1	Click on the **Security settings** tab in the **My CallPilot Administration Utility** to access the control for this feature.
2	Select the **Allow user to send voice message to non-CallPilot recipients** (only applies to CallPilot 2.0 and 3.0 servers) check box.
3	Click **OK**. You are presented with a prompt to restart Internet Information Services (IIS).



If you restart IIS, you can use Voice Blocking immediately; otherwise, the feature takes effect the next time a user logs on to My CallPilot. The system administrator can restart IIS using either the Restart IIS dialog box or the IIS Manager screen.

—End—

If this feature is enabled, My CallPilot users cannot save a voice message to their local computer, which prevents distribution as an e-mail attachment. They also cannot forward voice messages to non-CallPilot addresses. However, users can forward voice messages to addresses in CallPilot format.

This setting applies to all My CallPilot users and CallPilot servers, including CallPilot servers configured in user accounts as an external e-mail server. It does not apply to non-CallPilot servers.

This feature does not block users from forwarding voice messages to an external e-mail account if they are using Internet IMAP clients.

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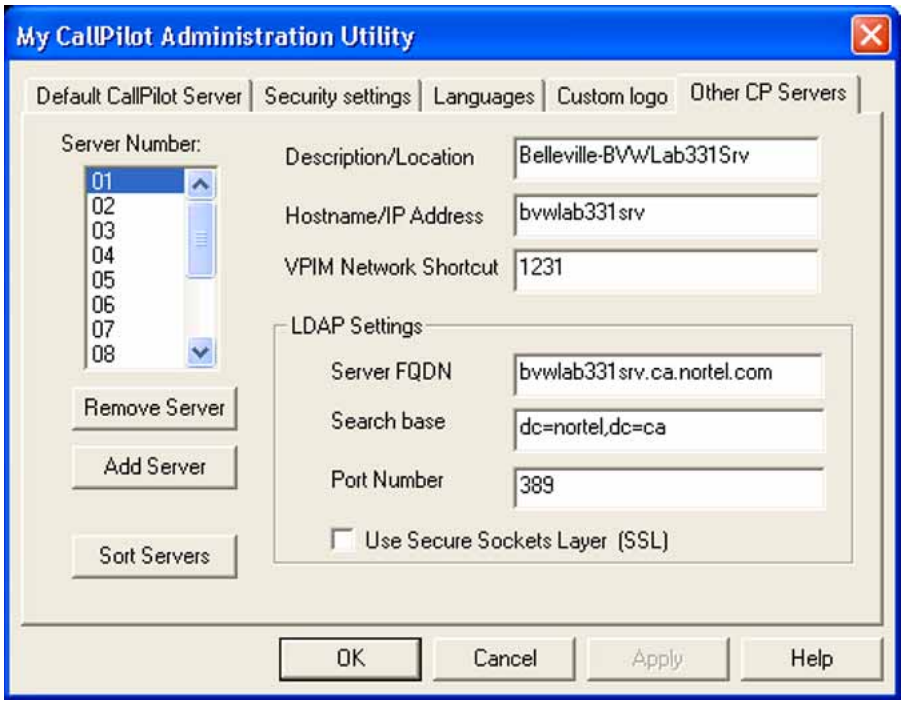
For information about how to block voice messages in integrated Desktop Messaging clients (Outlook\Exchange, GroupWise, or Lotus Notes), see "Controlling access to features" (page 31).

Using My CallPilot in multiple CallPilot server environments

My CallPilot has enhanced support for environments with multiple CallPilot servers. The multiple CallPilot server feature is configured by selecting the **Other CP Servers** tab. The following dialog box appears.



Enter the details for all of the CallPilot systems by pressing **Add Server** and fill in the information for each CallPilot server. Click **OK**. You must restart My CallPilot (restart IIS) for these changes to appear.

To test the installation

Step	Action
1	Use a client computer with the required software for My CallPilot.
2	Start Internet Explorer.
3	Type the My CallPilot URL in the following format: `http://moncton/mycallpilot` **Result:** In a few seconds, the Logon page appears.

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4 Log on to My CallPilot.

—End—

Installing My CallPilot on a Macintosh computer

Macintosh users no longer need to install a separate Web client to access My CallPilot. They can log on to My CallPilot using any of the supported Macintosh browsers.

Support for Mozilla and Firefox browsers on Linux OS

My CallPilot 5.0 supports Mozilla 1.7.x and Mozilla Firefox 2.0 browsers on RedHat Linux 9 OS.

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 and CallPilot Messaging tabs, with which they can view text and listen to audio messages using the WAV audio format. Supported WAV format record and playback applications include:

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

CallPilot server configuration for My CallPilot services

Overview

This section briefly describes how to configure the CallPilot server for several features 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

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To specify support information

Step	Action
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.

—End—

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

Step	Action
1	In CallPilot Manager, select **Messaging > External E-mail Servers**.
2	Click **Create E-mail Server**. *The External E-mail server properties page appears.*

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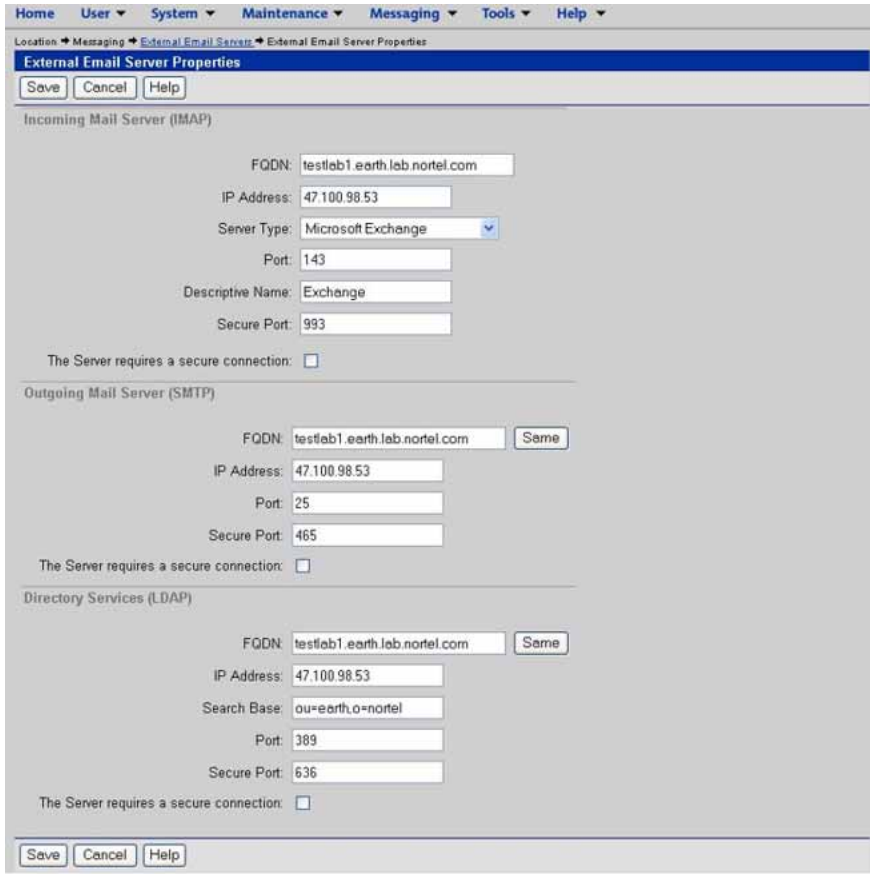

3 Enter the Incoming Mail Server (IMAP) information, Outgoing Mail Server (SMTP) information and Directory Services (LDAP) information provided by the administrator. If the SMTP and LDAP settings are the same as the IMAP settings, click the Same button next to FQDN and the fields automatically populate.

4 In the **External E-mail Server list**, define the servers that users can access with e-mail-by-phone and from My CallPilot.

5 Click **Save**.

—End—

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Chapter 8
Additional server configuration

This chapter contains the following topics:

"Accessing a third-party Address Book from a separate server" (page 149)

"My CallPilot security" (page 150)

"My CallPilot Administration Utility" (page 139)

Accessing a third-party Address Book from a separate server

Overview

With CallPilot, you can access a third-party LDAP server for message addressing.

Consult your LDAP server documentation for details about enabling and disabling LDAP service and configuring security options.

> ***Note:*** Users can only access third-party LDAP servers with Desktop Messaging if they use a Desktop Messaging groupware client (Outlook, GroupWise, or Lotus Notes).

You must specify the LDAP server name, port number, and search base in the Desktop Messaging client. For details about setting LDAP options in Desktop Messaging, see the Desktop Messaging online Help.

How to configure CallPilot Manager and Active Directory

To enable My CallPilot to search the Address Book directory, you need to configure CallPilot Manager and Active Directory first.

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Before you configure CallPilot, Nortel recommends you first use the Windows Address Book to search the Active Directory server. This lets you troubleshoot generic Active Directory configuration or networking issues. See the following links for more information on configuring the Windows Address Book to search any Active Directory database:

- How to configure Windows Address Book to search Active Directory servers: http://support.microsoft.com/?kbid=238007
- How to enable anonymous LDAP queries in Active Directory server: http://support.microsoft.com/default.aspx?scid=kb;en-us;Q320528

Once you can successfully search the Active Directory using the Windows Address Book, then you can configure CallPilot Manager with the same FQDN and searchbase information. Once CallPilot Manager is correctly configured, My CallPilot will also be able to search the external Address Book.

Configuring CallPilot Manager and Active Directory

Step	Action
1	Log on to CallPilot Manager.
2	Navigate to **Messaging** > **External E-mail Servers**.
3	Click Create **Email Server**. *The External Email Server Properties page displays.*
4	Enter the appropriate Incoming Mail Server (IMAP) information, Outgoing Mail Server (SMTP) information and Directory Services (LDAP) information. Ensure that the information under the LDAP section and in the Search Base box matches the Active Directory server hostname and FQDN.
5	Click **Save**.

—End—

My CallPilot security

Overview

My CallPilot operates using Internet protocols. The network security policies of your company can impose on My CallPilot. My CallPilot does not attempt to circumvent any firewall, or other network security software, installed on top of TCP/IP.

Consider the following security measures for My CallPilot:

- secure network configuration

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- authenticated access to the My CallPilot Web server
- port hiding

Discuss these security measures with your IS administrator.

CAUTION
Risk of incorrect operation
Use caution when you install and configure e-mail or file filtering software on the My CallPilot Web server. Filtering software must allow IMAP and HTTP uploads and downloads of the MIME types allowed by the external e-mail servers that you make accessible to My CallPilot. The .exe file extension must also be allowed for HTTP downloads, so you can download the CallPilot Player installer.

Recommended configuration for external Internet access

The following diagram shows the recommended configuration of the various servers used by My CallPilot in a network with an Internet firewall. Discuss the configuration requirements with your IS administrator.

CAUTION
Risk of system corruption or data loss
Nortel strongly recommends that you obtain an independent security audit before you provide external access to your system based on the recommended configuration.

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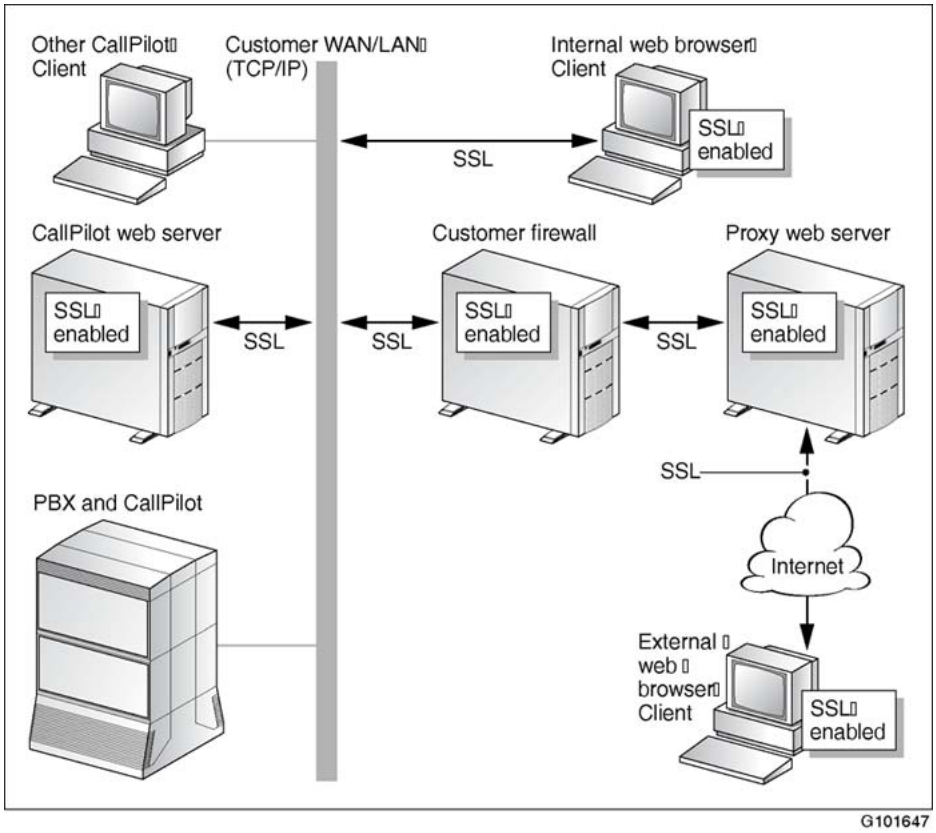

The recommended solution requires:

- a separate Web server to act as an external proxy server. Typically, organizations place a computer outside the firewall (for DNS and SMTP), which can function as the Web server proxy.
- SSL is enabled to secure communications:
  - on the My CallPilot server
  - on each My CallPilot Web client (SSL is available to both internal clients and external clients outside the firewall)
  - on the external Web server proxy and on the server with the firewall (if the firewall is installed on a separate server)

  For details about enabling SSL, see "Securing communication with the Web server" (page 153).
- SSL is only used for communication between the My CallPilot Web server and the Web clients. By default, all communication between the

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My CallPilot Web server and the CallPilot server is unencrypted. The LDAP, IMAP, and SMTP connections to CallPilot can also use SSL.

- configuration of the firewall to allow HTTP connections between the internal CallPilot Web server and the external Web server proxy

Securing communication with the Web server

My CallPilot supports Secure Socket Layer (SSL) over HTTP (HTTPS) for either the logon only, or for the entire My CallPilot session. HTTPS is a security protocol that provides:

- encryption of all information passed between the My CallPilot Web. server and My CallPilot Web clients (browsers)
- authentication of the Web server identity
- authentication of the Web client identity

SSL must be enabled both on the Web server and in the client Web browser to secure communications.

Enabling SSL

To enable SSL over HTTP (HTTPS) on the My CallPilot Web server, you must purchase and install an IIS authentication certificate on the server.

For information about obtaining an IIS authentication certificate, contact a vendor of authentication certificates, such as Verisign or Entrust. Consult your IS administrator about the best certificate for your organization. Ask your IS administrator to follow the certificate installation instructions in the IIS documentation. Popular vendors of authentication certificates also provide certificate installation instructions on their Web sites.

After you install the certificate, My CallPilot automatically displays the Enable Secure Login link on the logon page. For more information about this tool, see "My CallPilot Administration Utility" (page 139).

When you enable SSL on the Web server, the user can choose to log on to My CallPilot with SSL enabled. If the user chooses a secure logon, My CallPilot uses the HTTPS protocol to secure communications.

Port hiding

If you do not have an SSL certificate, and you make My CallPilot available over the Internet, you can change the port number for connections to the Web server. My CallPilot automatically detects and uses the configured port. This provides additional security by hiding the service from malicious attempts to scan well-known ports. Ask your IS administrator whether changing the port number for HTTP connections is appropriate for your system. The default HTTP port number is 80.

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LDAP SSL support

If the SSL check box is selected in the LDAP settings in the My CallPilot Administration Utility, My CallPilot uses SSL whenever it communicates with the LDAP protocol to the server.

Using My CallPilot with a firewall

To access the My CallPilot server through a firewall, the ports used by My CallPilot must be open. My CallPilot uses the following ports:

PROTOCOL	*NORMAL*	*SSL*
IMAP	143	993
SMTP	25	465
LDAP	389	636
HTTP	80	443
FTP	21	---

If the firewall is between My CallPilot and the user's browser, the following ports must be open: HTTP, FTP, and IMAP (for audio player telset).

If the firewall is between the CallPilot server and the My CallPilot server, the following ports must be open: FTP, IMAP, SMTP, and LDAP.

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Chapter 9
Troubleshooting

This chapter contains the following topics:

"Troubleshooting overview" (page 155)

"Desktop Messaging issues" (page 156)

"Microsoft Outlook issues" (page 167)

"Lotus Notes issues" (page 170)

"Novell GroupWise issues" (page 174)

"Internet mail client issues" (page 175)

"My CallPilot issues" (page 178)

Troubleshooting overview

Introduction

This chapter identifies problems that you can experience with Desktop Messaging and My CallPilot. It describes symptoms of the problem and suggests steps you can follow to fix the problem.

This chapter focuses on problems that require the assistance of an administrator. Basic troubleshooting information for users is available in the Desktop Messaging online Help. Troubleshooting information for Internet mail client users appears in the CallPilot Player online Help.

Based on the user's expertise, you can guide the user in performing the steps. Where the solution requires action on the CallPilot server or in CallPilot Manager, the text indicates this requirement.

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If the suggested action does not correct the problem, contact your Nortel representative.

The *CallPilot Troubleshooting Reference* is for Nortel distributors and technical support representatives. It is not part of the customer documentation package. It is 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.

Desktop Messaging issues

Messaging server compatibility

CallPilot 5.0 Desktop Messaging clients work with CallPilot 2.5, 3.0, 4.0, and 5.0 servers. The availability of some features depends on the messaging server you use.

General issues

Before you install

Before you install Desktop Messaging, you require the following information:

- CallPilot mailbox number
- VPIM network shortcut of the CallPilot server
- fully qualified domain name of the CallPilot server
- search base for LDAP address searches in the CallPilot server

You also must ensure that the e-mail client that the user requires is installed on the user's computer, and is working properly.

To help you troubleshoot problems, obtain the version number of the Desktop Messaging client.

To obtain the version number

Step	Action
1	If the user cannot log on, but you require the CallPilot version number, navigate to the following file: nmplayer.exe
2	Right-click the file, and then select **Properties**. The Properties page appears.
3	Click the **Version** tab. Version information for Desktop Messaging appears.

—End—

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General logon issues

Symptom: Error message about invalid credentials

The user receives a message similar to Invalid credentials. Please retry... or The server could not be located. Please retry... .

Solution

(from the user's computer)

Step	Action
1	Verify that Desktop Messaging is configured with the correct information, including the following settings: • mailbox number • fully qualified domain name (FQDN) of the CallPilot server • VPIM network shortcut of the CallPilot server • search base for address searches in the CallPilot directory
2	Verify that you can log on successfully from the telephone using the same mailbox number and password.
3	Verify that you have network connectivity to the CallPilot server. For example, issue a network command to the CallPilot server exactly as it appears in your Desktop Messaging configuration — try to ping using the Command Prompt — and ensure that you receive a valid response from the CallPilot server. From the Start menu on your Windows desktop, select the Command Prompt (typically found under the Programs/Accessories submenu). A new window appears with the command prompt C:\. From the command prompt, issue a ping command to the fully qualified domain name of the CallPilot server as follows: `ping <CallPilot FQDN>` If the response is request timed out, you do not have network connectivity to the CallPilot server. You cannot access Desktop Messaging.

—End—

Solution

(administrator only)

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Step	Action
1	In CallPilot Manager, check the following: • The user's mailbox is enabled. View the user's settings on the User Detail page, and check the mailbox status in the Security section. • IMAP is enabled on the CallPilot server, and there are no alarms referring to the IMAP service. • Desktop and Web Messaging capability is enabled for the mailbox.

2	The CallPilot server name cannot be on the DNS server.
	From the Start menu on your Windows desktop, select the **command prompt** (typically found under the Programs/Accessories submenu). A new window appears with the Command Prompt C:\. From the command prompt, issue a ping command to the CallPilot server IP address as follows:
	`ping <CallPilot server IP address>`
	If the response is request timed out, then issue a ping command to the fully qualified domain name of the CallPilot server. Type
	`ping <CallPilot FQDN>`
	• If you receive a ping response from the IP address, but not the server name, check the following:
	• If you have a DNS server
	• Ensure that DNS is configured on the CallPilot server computer. Under TCP/IP properties, select the DNS tab. Ensure that a DNS server is listed. Verify the IP address for the DNS server.
	• Check with the DNS administrator whether the server name is on the DNS server. Verify that the correct host name is configured on the DNS server.
	If you do not have a DNS server
	• Set up domain name resolution using a HOSTS file, or configure CallPilot and Desktop Messaging using the CLAN IP address only. For details about setting up a HOSTS file, see the CallPilot Manager online Help.
	Note: Nortel recommends that you set up DNS instead of asking Desktop Messaging users to update a HOSTS file.

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3	If the problem continues, stop and restart the IMAP service on the CallPilot server.

—End—

Symptom: Error message about no Desktop Messaging capability

When the user attempts to log on, a message states that You do not have Desktop Messaging capability.

Solution

As the CallPilot administrator, do the following:

Step	Action
1	Verify that Desktop Messaging is configured with the correct Mailbox number.
2	Verify that this mailbox is assigned to a mailbox class with Desktop capability enabled. For information about mailbox class capabilities, see the CallPilot Manager online Help.

—End—

Symptom: No entries in the CallPilot Address Book

The CallPilot Address Book was downloaded, and a dialog box appears stating that 0 entries are found.

Solution

As the administrator, do the following:

Step	Action
1	Check the CallPilot Address Book search base. Open the Desktop Messaging options dialog box, and then click the Address Book tab to view the search base.
2	Verify that the search base exactly matches the search base configured in CallPilot Manager.

—End—

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Other issues

Symptom: Linux client unable to read WAV files.

Solution

For optimum efficiency and resource usage, the Message Forwarding feature of CallPilot generates audio files in GSM 6.10 format (with a MS WAV format header). This audio format is automatically supported on computers running Windows 2000 and newer, and Mac OS 10.3 and newer. You can use the built-in audio programs (ex. Windows Media Player or Apple QuickTime Player) to listen to a forwarded CallPilot message in GSM 6.10 format.

Some versions of Linux do not have built-in support for this audio format.

To add support for this audio format, Nortel recommends that users install the open-source audio program called Audacity. For more information see the Audacity home page audacity.sourceforge.net.

Symptom: The user has message access problems.

The user modified Desktop Messaging settings with correct information, but the user still cannot access CallPilot messages.

Solution

If you modify the settings while Desktop Messaging is running, close and restart Desktop Messaging so that the settings take effect. If the user still cannot access messages, do the following:

- Verify the mailbox class.
- Check the alarm monitor to ensure that there are no alarms relating to the IMAP service.
- Verify network connectivity to CallPilot.

Symptom: Cannot send messages

The user cannot send messages to telephone, fax, AMIS users, or networking users.

Solution

Step	Action
1	Ensure the user is addressing messages correctly. See the online Help for information about supported address formats.
2	Verify the capabilities enabled for the user's mailbox. Restrictions for unauthenticated SMTP users can be defined by the CallPilot

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administrator. Such restrictions can prevent a user from sending messages to other types of users.

- Verify that the user can send messages to the required recipient (telephone, fax, AMIS users, or networking users).
- Ensure that Security Modes for SMTP Sessions in CallPilot Manager/Messaging/Message Delivery Configuration have authentication options other than just 'Unauthenticated' selected.
- Ensure that the user provides SMTP authentication from their client. If the user connects from one of the Nortel-provided clients, such as Outlook, Lotus Notes, GroupWise, or My CallPilot, then client-side SMTP authentication is automatically used as long as the server-side Security Modes for SMTP Sessions mentioned in the previous bullet were set.
- Verify that the restriction permission list (RPL) in the CallPilot system is configured to allow DTT and DTF network messages.

3 For DTT and DTF messages, ensure that you can dial the required number from a phone connected to the same switch as CallPilot.

4 For networking, verify that networking is currently configured in CallPilot administration. For more information about networking, see the *Networking Implementation and Administration Guide*.

—End—

Symptom: Cannot send a CallPilot message

The user cannot send a CallPilot message. When the user clicks Send, the following error dialog box appears: "Error. Failed to send message".

Solution

Check the following on the user's computer:

Step	Action
1	Verify that neither the CallPilot mailbox nor the e-mail mailbox is full. A user cannot send a CallPilot message if either of the mailboxes is full.
2	Check the format of the message address. The FQDN on the right side of the @ symbol must match the FQDN configured on the CallPilot server.

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3 Delete any empty attachments. An empty attachment causes the entire message to be rejected.

4 Verify that you can ping the CallPilot server. From the Start menu on your Windows desktop, select the command prompt (typically found under the Programs/Accessories submenu). A new window appears with the command prompt C:\. At the command prompt, type

```
ping <CallPilot FQDN>
```

If the response is request timed out, type

```
ping <CallPilot server IP address>
```

If there is a reply to this ping command, the CallPilot server FQDN is not properly configured in your Domain Name System (DNS). Contact your DNS administrator for assistance.

5 If you do not have a DNS server, you require a hosts file entry. For more information, see the CallPilot Manager online Help.

6 If the response is No Reply, verify that the CallPilot server is reachable on your LAN. Contact your IS administrator for help.

7 Verify that the CallPilot server is up and running.

8 If there is no response, verify that the Internet Message Agent (IMA), Message Transfer Agent (MTA), and IMAP services are running. You may need to restore them.

—End—

Symptom: Cannot send faxes

Solution

Step	Action
1	If the error message states that the message cannot be sent because part of the media cannot be converted, or because the media is not supported at the recipient's system, ensure that in messages you send with Desktop Messaging, you only send attachments that are TIFF-F, WAV, VBK, or text files. ***Note:*** All other message types, including Rich Text Format (RTF) are rejected by CallPilot server.
2	Ensure that you, as the sender, and the recipients have the capability to send and receive fax messages. Ensure that all TIFF files are

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created as TIFF class F (TIFF-F) files, using the Nortel Fax Printer. Not all TIFF files are class F.

3 Ensure that your mailbox is not full. If you receive an error message that your mailbox is full when you log on, delete messages to create space in your mailbox.

4 If messages are not returned with a Non Delivery Notification (NDN), check the CallPilot server processor usage. If it is at or near 100 percent for a long time, contact your Nortel Customer Technical Support.

—End—

Symptom: Problems receiving faxes

People do not receive faxes sent by users, or users do not receive faxes that others send them.

Solution

- Verify that the mailbox class that is assigned to the user can send and receive faxes.
- Make sure that those you send faxes to can receive faxes.

Symptom: Problems receiving replies

Recipients receive CallPilot messages from users, but users do not receive any replies to their messages.

Solution

Step	Action
1	Open the **Desktop Messaging** Options dialog box.
2	Ensure that the VPIM network shortcut is correct.

—End—

If people send you faxes (TIFF-F files) in their replies, ensure that you have fax capability enabled for your CallPilot mailbox.

Symptom: Cannot print text messages

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Users can see text messages in their Desktop Messaging mailbox, but when they try to print them to a fax machine from the telephone, they receive the message "Your command cannot be completed at this time".

Solution

Users must have fax capability for their mailbox to print text messages from the telephone. A user with Desktop Messaging capability, but without fax capability, cannot print text messages from the telephone.

For more information about assigning access rights in a mailbox class, see the CallPilot Manager online Help.

Symptom: Voice message does not play on telephone

The user tries to play a voice message from the telephone in Desktop Messaging. The user answers the telephone when it rings, but the message does not play.

Solution

Step	Action
1	When you answer the telephone, say "Hello" to initiate message playback.
2	Check the CallPilot player status bar. If it states Open Pending, hang up the telephone. On the player, click Computer, and then click telset playback. The phone rings again.
3	If the Status bar still states Open Pending, click the **Release telset** button. Alternatively, you can hang up again, wait from 3 to 5 minutes and attempt to play again. If this problem persists, contact your Nortel customer technical support.

—End—

Symptom: Cannot view CallPilot faxes using third-party fax viewer.

Users cannot view received faxes with fax viewers other than the built-in CallPilot viewer.

Solution

Step	Action
1	View the fax with the CallPilot Desktop Messaging fax viewer, and save the fax to disk.

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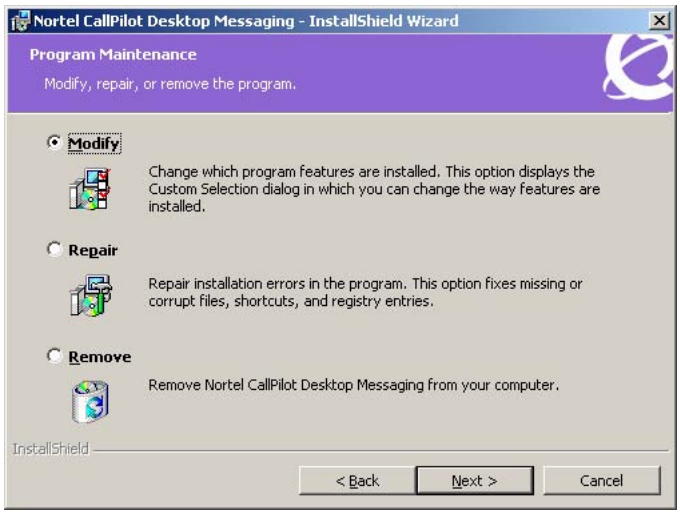
2 If CallPilot Desktop Messaging for Outlook, Lotus Notes, or GroupWise is not installed, you can use other third-party viewers to view the fax.

—End—

Symptom: The user needs to modify, repair, or remove CallPilot Desktop Messaging.

Solution

Use Maintenance Mode. In Maintenance Mode, you can modify installed features, repair corrupted files, or remove CallPilot Desktop Messaging. When the software is installed, run the setup.exe file to alter CallPilot Desktop Messaging.



Symptom:

Users have trouble connecting to the CallPilot server.

Problems can include:

- trouble connecting to the server
- CallPilot player problems
- Address Book problems
- message compose, reply, forward, delete, or notification problems

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Solution

Users, developers, and support personnel can activate CPTrace to collect information about problems with one of the Desktop Messaging clients on which CallPilot runs. Save this information to a log file to be analyzed to determine the cause of the problem.

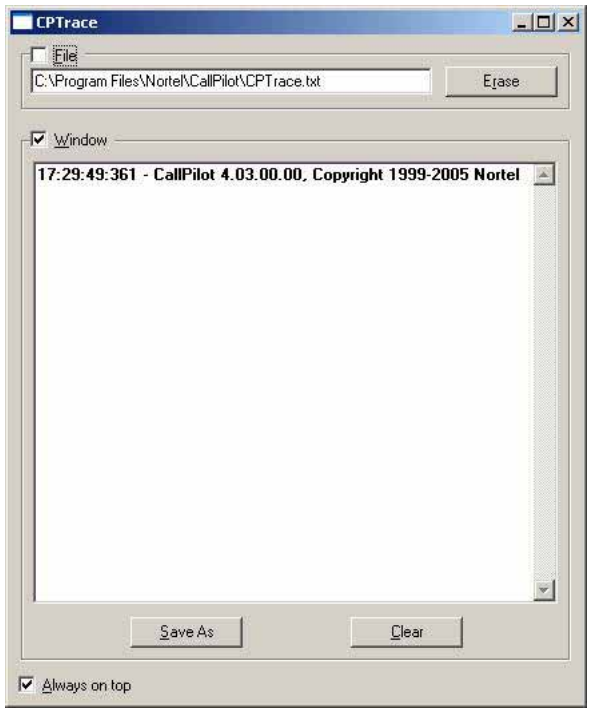
The CPTrace tool is intended for Nortel designers and support personnel.

Users of this tool must have an understanding of Desktop Messaging client functionality and the corresponding components on the server (IMAP).

CAUTION
Risk of impact to CallPilot
CPTrace affects the way Desktop Messaging works. In rare instances, you cannot reproduce problems while CPTrace is running.

To set CPTrace options

Step	Action
1	Select **Start > Programs > Nortel > CallPilot Desktop Messaging > CPTrace**.



2	Specify the required options. The options you select are stored in the Windows registry for the next time that you run CPTrace.

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—End—

Microsoft Outlook issues

Outlook 2002 issues

To ensure that Desktop Messaging works correctly with Microsoft Outlook, you can install the latest Outlook 2002 service pack. For information about the latest Office XP service pack, go to the Microsoft Web site (http://www.microsoft.com) and search for article Q307841 in the Microsoft Knowledge Base. Also see article Q319820 for additional fixes to Outlook 2002.

Symptom: CallPilot messages remain in the outbox or generate non-delivery reports

Microsoft Outlook 2002/XP can fail to deliver faxes sent using Nortel Fax and Nortel Fax Batch, or when you choose Send CallPilot Message from the Start menu.

This problem can occur in Outlook when multiple accounts, including an Exchange Server account, are configured in an Outlook profile. It only occurs if the profile is configured to deliver new messages to the Exchange Server account, rather than to a personal folder.

Solution

Nortel recommends that you upgrade to Microsoft Outlook 2003. If you cannot upgrade to Microsoft Outlook 2003, you can set a registry value to work around this problem. To set the registry value, hold down the CTRL and SHIFT keys when the CallPilot splash screen appears during Microsoft Outlook startup. Continue holding these keys down until the CallPilot Non-Delivery Reports dialog box appears. Follow the instructions to set the appropriate registry value.

Using Outlook

Symptom: Microsoft Outlook messages remain in outbox

In Microsoft Outlook, messages remain in the e-mail outbox (not the CallPilot Message Store outbox). This problem can be caused by the migration from one server to another, while maintaining the same Outlook client.

Solution

Remove the Exchange server from the e-mail profile, and then add it in again.

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Symptom: You open a message that contains an embedded message, by using Microsoft Outlook Web Access (OWA) over a Secure Sockets Layer (SSL) connection. If you try to save the embedded message to the local hard disk, you receive the following error message:

Internet Explorer cannot download {***filename***} from {***server name***}.

For example, if you right-click the link to the embedded message and then click Save.

This issue occurs if the message that you open was composed in a Microsoft Outlook client or an OWA S/MIME client.

Solution

Complete the following steps to turn the Do not save encrypted pages to disk option in Internet Explorer.

Step	Action
1	Start Internet Explorer.
2	On the **Tools** menu, click **Internet Options**.
3	Click the **Advanced** tab, and then under **Security**, select the **Do not save encrypted pages to disk** check box.
4	Click **Apply**, and then click **OK**.

—End—

Symptom: invalid or corrupt messages in your inbox

Solution

Reset the CallPilot message store to remove invalid or corrupt messages from the inbox.

In Microsoft Outlook, this feature is used by system administrators and CallPilot product support. Lotus Notes and GroupWise users can reset their mailboxes by choosing the Refresh CallPilot Message List command.

To reset the CallPilot message store

Step	Action
1	Press and hold **Ctrl+Shift**.
2	Click the Microsoft Outlook **Send/Receive** icon.

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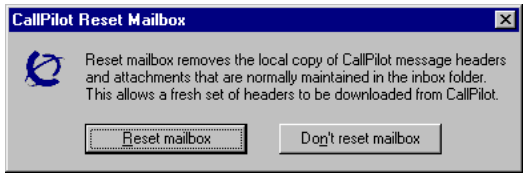
3 Continue to hold **Ctrl+Shift** until the CallPilot Reset Mailbox dialog box appears.



4 Click **Reset mailbox**.

The system purges all CallPilot messages from the CallPilot inbox, and the CallPilot message headers currently stored on the CallPilot server for that user are downloaded again. The user sees all messages disappear and reappear one by one. All message caching is lost.

Note: The messages are not deleted from the CallPilot server; they are removed from the computer cache. Messages are downloaded again from the CallPilot server to the user's computer.

—End—

Symptom: Microsoft Outlook lockup during Desktop login procedure

Microsoft Outlook users that have Desktop Messaging installed can experience a lockup during Outlook start-up and/or while logging into Desktop Messaging. This issue is manifesting more frequently if there is a significant number of Outlook/Desktop users in the same network.

Solution

A special Desktop feature is used to avoid this problem. In order to enable special desktop feature, site administrator must create a custom installation of Desktop Messaging (please refer to a corresponding chapter of this document). In the created *setup.ini* file a special SERVER_SYNC property should be set to a new value that will represent a delay (in seconds) between Desktop start-up and message synchronization procedure. The value is limited within 0-120 seconds range. Setting this value to 15 seconds is usually enough for a network with 1500 PCs in it.

ATTENTION

Such a custom installation should be created every time Desktop is installed or upgraded or this feature will be deactivated.

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Lotus Notes issues

Installation issues

Symptom: Authorization error message in Lotus Notes

Error message: No authorization to perform this operation.

Solution

Lotus 6.0, 6.5, and 7.0 users must have Manager Rights access control of the mail database to install Desktop Messaging for Lotus Notes. The Lotus Notes administrator sets this control on the server for each user. If the user does not have Manager Rights access, you have two options:

- Temporarily assign Manager Rights access to the user.
- Manually update the Mail database from the server for each user who requires CallPilot access. This update creates a new folder, CallPilot Desktop Messaging, in Lotus Notes. For details about manual updates, see "Updating the Mail database design" (page 90).

To determine the level of access control for a user

Step	Action
1	From the user's Lotus Notes Mail database, choose **File > Database > Access Control**.
2	In the displayed list, click the user's name. The user's access control level appears in the Access box.

—End—

Other issues

Symptom: Cannot see the CallPilot Desktop Messaging folder in Lotus Notes

When the user logs on to Lotus Notes, the CallPilot Desktop Messaging folder is not visible.

If CallPilot is properly installed, the user sees CallPilot Desktop Messaging under Folders and Views. In the Personal Name and Address Book on the local database, the user sees two new views:

- Groups (CallPilot)
- People (CallPilot)

Notes:

- In Lotus Notes versions 6.0, 6.5, and 7.0, these views are accessible only from the View menu.

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- Lotus Notes 6.0, 6.5, and 7.0 users must log on to CallPilot before they can download the Address Book.

Solution

Step	Action
1	Verify that you are in Folders and Views > CallPilot Desktop Messaging.
2	If you do not see CallPilot Desktop Messaging, and you are in Folders and Views, uninstall the current version of Desktop Messaging, and reinstall it. During reinstallation, ensure that you select Update Lotus Notes databases in the Ready to Install window. ***Note:*** Update Lotus Notes mail database and Update Lotus Notes Personal Address Book options are checked by default. If you clear these options, the Lotus Notes administrator must update your mail database on the server to enable Desktop Messaging and you cannot use your Personal Address Book for storing or accessing CallPilot address information. You can also (not recommended) replace the Mail database design manually. Perform a manual update only under special circumstances. For more information, see "Updating the Mail database design" (page 90).

—End—

Symptom: No entries in CallPilot Personal Name and Address Book in Lotus Notes

In the Personal Name and Address Book window, the user selects People (CallPilot). The CallPilot Address Book contains no entries.

Solution

You must download the CallPilot Address Book manually.

To manually download the CallPilot Address Book

Step	Action
1	Make sure that your Address Book — People (CallPilot) window is the active window.
2	Choose **Actions > Download CallPilot Address Book**.

—End—

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Symptom: DLL error message in Lotus Notes

Error message: The dynamic link library nnotes.dll could not be found in the specified path.

Solution

Step	Action
1	On the Windows desktop, right-click the **Lotus Notes** icon, select **Properties**, and then click the **Shortcut** tab.
2	Examine the properties of your Lotus Notes shortcut.
3	Verify the path in the **Start in** box. ***Note:*** Usually, when Lotus Notes creates a shortcut, it puts a working directory in this box.
4	Add or update the path.

—End—

Replacing the mail database design in Lotus Notes

An administrator or user can replace the mail database design if:

- users want CallPilot messages stored in the same inbox as their Lotus Notes e-mail messages.
- user database design is not customized, and the users do not intend to customize the database design in the future.
- the administrator or user is familiar with modifying the Notes database design.

ATTENTION

Risk of data loss

Replacement of the database design removes any customization in the current database design. If the mail database is customized, you can update the database instead of replacing it. You must ensure that the version of the CallPilot template is the same version number as the Lotus Notes template you are replacing.

You can replace the mail database from the user's workstation or from the Notes server.

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To replace the database design from the user workstation

Step	Action
1	Log on to Lotus Notes on the user's workstation.
2	Make a note of the version of Lotus Notes. Choose **Help > About Notes Desktop**.
3	Select the **mail database** icon.
4	Choose **File > Database > Replace Design**. The Replace Database Design dialog box appears.
5	Select **Local** from the Template Server list, and then click **OK**.
6	Select **Show advanced templates**.
7	Select **CallPilot Mail (R6.0), CallPilot Mail (R6.5),** or **CallPilot Mail (R7.0)** from the list. Your selection depends on which version of Lotus Notes client you are running.
8	Ensure that • Inherit future design changes is checked. • Hide formulas and LotusScript is not checked.
9	Click **Replace**.
10	A message asks you to confirm that you want to change the database view. Click **Yes**.

—End—

To replace the database design (Notes server)

Step	Action
1	Install Desktop Messaging on the Lotus Notes server computer by running LNSERVER.EXE from the Desktop Messaging CD.
2	Start Lotus Notes.
3	Choose **File > Database > Open**.
4	Select the mail database icon.
5	Choose **File > Database > Replace design**. The Replace Database Design dialog box appears.
6	Select **Show advanced templates**.

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7 Select **CallPilot Mail (R5.0)**, **CallPilot Mail (R6.0)**, CallPilot Mail (R6.5.4), or **CallPilot Mail (R7.0)** as required.

8 Make sure that

- Inherit future design changes is checked
- Hide formulas and LotusScript is not checked

9 Click **Replace**.

10 Repeat steps 3 to 9 for each database that you must update.

11 Press F9 to refresh the window and display the names.

—End—

Novell GroupWise issues

Installation issues

Symptom: The GroupWise option is unavailable during Desktop Messaging installation

CallPilot Desktop Messaging requires Windows Messaging on your computer. Normally, Windows Messaging is installed with Windows.

Solution

The GroupWise installation program checks for Windows Messaging. If it is not detected, the installation program provides the following options:

1. Install the complete Windows Messaging system.
2. Leave Windows Messaging as is.

Choose option 1, even if Windows Messaging is installed to ensure that the GroupWise option is available during Desktop Messaging installation.

Other issues

Symptom: Cannot find the Compose New CallPilot Message icon on the toolbar

When the user opens Groupwise, the button to compose a new message in CallPilot is not visible on the toolbar.

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Solution

GroupWise does not resize buttons automatically based on the window size and when the buttons on the toolbar are not visible. You can resolve this by setting your screen resolution so that the Compose New Message button appears on the toolbar. For example, set your screen resolution to 1280 x 1024.

Internet mail client issues

Introduction

This section includes only issues that require administrator assistance. For troubleshooting information for users, see the CallPilot Player online Help.

Desktop Messaging error codes

Desktop Messaging Internet mail clients display error codes when a problem occurs. The following table describes Desktop Messaging error codes.

Code	Error message
6	Your message did not reach some or all of the intended recipients.
16	The message was not delivered because an undefined problem occurred.
17	There is a problem with the specified address. Please verify the address.
18	The external telephone number used in addressing the message could not be dialed. Please verify the telephone number.
19	The mailbox or telephone number is invalid. Please confirm the address.
20	The address is invalid. Please verify the destination system.
22	The mailbox address was at one time valid, but mail is no longer being accepted. Please confirm the address.
23	The mailbox exists, but something at the destination mailbox caused your message not to be received. Please try sending the message again later.
24	The recipient did not receive the message because the recipient did not instruct the service to play the message (by pressing the appropriate telephone key).
25	The mailbox exists, but is not accepting messages at this time because it can be temporarily disabled. Please try sending this message again later.
26	The recipient's mailbox is full. Please try sending this message again later.
27	The message length exceeds the administrative limit for the sender's mailbox.
28	The address is a mailing list and could not be expanded.
29	The message was not delivered because a system problem occurred.
30	The system storage has been exceeded. Please try sending this message again later.

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Code	Error message
31	The recipient's system is not accepting messages. Please try sending this message again later.
32	Some features in the message are not supported. For example, you are not able to send a message with this media.
33	Recipients cannot receive messages with a private tag. Please try sending the message again without the private tag.
35	The system does not allow messages that are this large.
36	A problem occurred in the network. Please try sending the message again later.
37	An outgoing connection could not be made with the destination. Please try sending the message later.
38	A problem occurred during the transmission of your message.
39	A directory server was unavailable. Please try again later or contact your Administrator.
40	The network was congested or the telephone line was busy. Please try sending the message later.
41	The number of attempts to deliver the message has exceeded the system maximum. Please try sending the message again later.
42	An error occurred during the transmission of your message.
43	This message was addressed to too many recipients. Please reduce the number of recipients and try sending the message again.
44	There was a problem with the content of your message. Please recreate the message and send it again.
45	The message contains media that cannot be delivered. The recipient cannot receive a message with this media.
46	The voice portion of the mixed media message was delivered. The recipient can only receive this part of the message.
47	The fax portion of the mixed media message was delivered. The recipient can only receive this part of the message.
48	Some media contained in your message was not converted successfully. Some of the recipients did not receive the message.
49	A security measure or policy prevented the delivery of the message. Please contact your Administrator.
50	The recipient(s) could not be reached. Please consult with your Administrator for assistance.
51	Legislative policy restricts the delivery of messages at this time. Consult with your Administrator on the best time to send the message.
52	The recipient(s) could not be reached. Please consult with your Administrator for assistance.

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Code	Error message
92	Invalid mailbox number/password.
94	User does not have desktop capability. Please contact your administrator.
95	Invalid mailbox number/password. Please contact your administrator.
97	Invalid mailbox number/password. Maximum number of invalid login attempts occurred. Please contact your administrator.
98	Invalid mailbox number/password. Maximum number of invalid login attempts in this session occurred. Please restart your login session.
100	Invalid login. Cannot access system resources. Try again later.
101	Too many login failures.
102	Too many authentication failures.
105	Autologout; your session has been idle for too long. You are no longer connected to the server. Please log in again to send and receive new messages.
107	Mailbox error.
108	Your mailbox is almost full.
110	Your password has expired. Please change your password.
111	The temporary password assigned to you by the administrator must be changed. Please change your password.
123	The Login authentication method is disabled. Please contact your administrator.
124	The Challenge-Response authentication method is disabled. Please contact your administrator.
125	Your mailbox is full. Delete messages you no longer require.
133	Remote Notification was turned off by the person who answered the notification call. It has now been turned back on.
134	Remote Notification was turned off. It has now been turned back on.
135	Remote Notification has been turned off. Please ensure that the number is correct, and review your notification setup before turning notification back on.
136	Your password expires in *n* days [where *n* is the number of days]

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My CallPilot issues

Introduction

Severe My CallPilot errors are logged in the Web server event log. You can view them using Event Viewer. If you are unfamiliar with the Microsoft IIS server and its operation, contact your IS administrator to assist you in troubleshooting My CallPilot problems.

Symptom: The Web browser times out, or one of the following error messages appear in place of the My CallPilot log on screen when you browse to the My CallPilot URL:

Document contains no data.
Cannot find server.
The page cannot be displayed. The page you are looking for is currently unavailable.
Session (...) object required.

Solution:

(administrator only)

The Web server (Internet Information Services) crashed or is unstable. Restart the IIS server:

Step	Action
1	Launch the **My CallPilot Setup** tool (in the Start Menu, under **Nortel My CallPilot)**.
2	Type a space character at the end of the server field, and delete it. (The My CallPilot Setup tool interprets this as a configuration change, even though modifications to the information were not made.)
3	Click **OK**. Another dialog box appears.
4	Click **Restart IIS**.

—End—

If this does not fix the problem, restart the computer. If this still does not fix the problem, run the CPTrace tool to determine if My CallPilot is attempting to run. If it does not appear to run, the problem can be one of the following:

- The CallPilot virtual directory is not created inside IIS (this can be checked by using the Microsoft Management Console or Internet Services Manager).
- The My CallPilot DLLs are not properly registered in the Windows environment. To reinstall these DLLs, find and launch the

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registerDLLs.bat file (typically in the C:\Program Files\Nortel\My CallPilot\bin\ directory). Note any errors that occur while the registration takes place.

Symptom: Web browser times out; restarting the computer does not solve the problem.

Solution:
(administrator only)

Run the CPTrace logging utility to troubleshoot internal My CallPilot problems. This program displays debugging information that Nortel technical support personnel uses to determine the problem. It is in the bin subdirectory where My CallPilot is installed (typically C:\Program Files\Nortel\My CallPilot\bin\cptrace.exe).

You can enter a file name (for example, C:\mycallpilot.log) and select the **File** check box to enable logging to a text file. You can send this file to technical support personnel for analysis.

Running CPTrace can cause a small performance impact on the server; therefore, Nortel recommends that you do not leave CPTrace running unless you are debugging a problem.

The following image is an example of the CPTrace utility.

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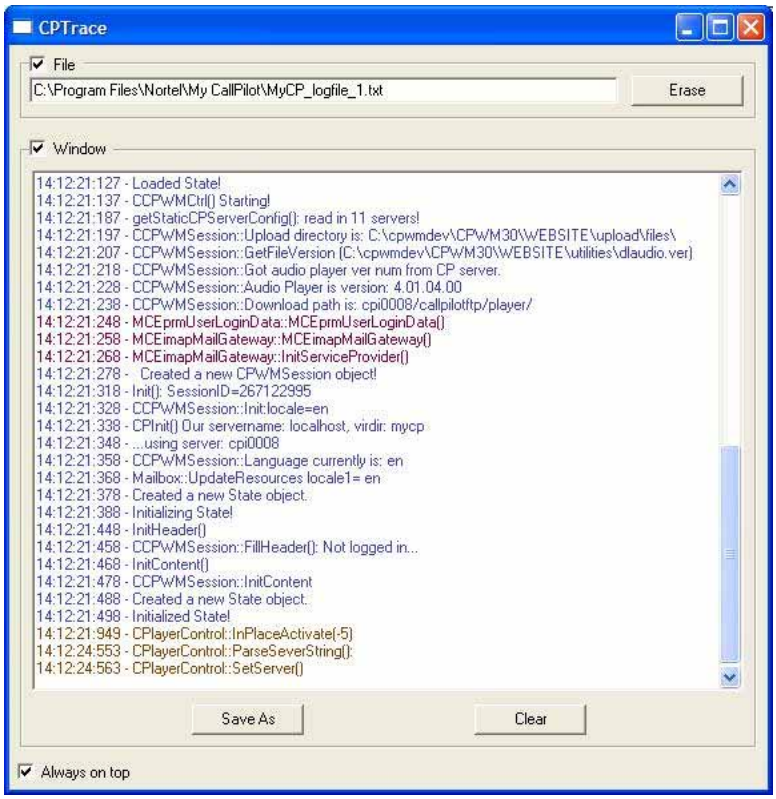

Symptom: Installation problems

The user sees a blank screen if My CallPilot virtual directory is not set up as an application virtual directory.

Solution

(administrator only)

Step	Action
1	**Open** the Microsoft Management Console or Internet Services Manager and select the Properties section of the virtual directory. Click **Make Application**.
2	Ensure that you can ping CallPilot server from the Web server by using either the IP address or the fully qualified domain name of the CallPilot server (whichever is used as the IMAP server registry entry).
3	Ensure that the COM control is registered. Search the registry for CPWMCTRL.

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During installation, setup attempts to register the file CPWMCTRL.DLL, which is found in the My CallPilot directory specified during installation.

a. Verify that Nortel.CPWMCtrl.001 was inserted into the registry and is associated with the CPWMCTRL.DLL file in the correct directory. Use a registry search tool to verify this.

b. If the file is not properly registered, register it manually using regsvr32.exe, which is found in the Windows system directory. You can also use the **RegisterDLLs.bat** batch file that will register all of the required DLLs.

   The host name of the CallPilot IMAP server is installed at the following location in the WinNT registry:

   HKEY_LOCAL_MACHINE\SOFTWARE\Nortel\CallPilot\Web-Client\ IMAPServer

c. Ensure that this attribute is set correctly to the host name of the CallPilot IMAP server. The host name must be fully qualified if it is on another domain.

—End—

Symptom: Web server problems recorded in the error log

The IIS server reports serious problems in the WinNT error log.

Solution

(administrator only)

Step	Action
1	On the Windows menu of the IIS server, choose **Start > Administrative Tools > Error & Event Log**.
2	Check both the System and Application logs.

—End—

Symptom: Logon problems

Error message: Error. Login failed. Failure to log on can result from either My CallPilot problems or CallPilot problems.

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Solution
(administrator only)

Step	Action
1	Verify that IMAP is enabled in CallPilot Manager.
2	Verify all items under Symptom: Installation problems.
3	Ensure that Desktop Messaging capability is enabled in the user's CallPilot mailbox.
4	Check the event log on the Web server.
5	Use the MyCallPilot Setup utility to verify that the My CallPilot configuration is correct (choose **Start** > **My CallPilot**).
6	If logon problems are intermittent and you are using Windows Advanced Server network load balancing, see Symptom: Intermittent problems with logging on to My CallPilot.
7	Isolate the possible source of the problem. • Try to log on using a Desktop Messaging client. If the Desktop Messaging client fails, the problem is with CallPilot. If it succeeds, the problem is with My CallPilot. • If you cannot log on from a Desktop Messaging client, try to log on from a telephone. If logon from a telephone is successful, the problem can be related to the CallPilot IMAP server. In this case, follow CallPilot troubleshooting procedures for IMAP/Desktop Messaging. For example, you can stop and restart the IMAP server on the CallPilot system using the Windows NT Service Control Panel. Make sure that Desktop Messaging is not in use by any CallPilot users. When you stop the IMAP service, it ends all Desktop Messaging sessions and requires users to log on again.
8	If the CallPilot IMAP service is down and users try to log on, they do not receive a message telling them that the server is down. Instead, they receive the following message: Login failed, please try again.

—End—

Symptom: Intermittent problems logging on to My CallPilot

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If you are using Windows Advanced Server network load balancing to manage My CallPilot traffic and your users have intermittent problems logging on to My CallPilot, you can adjust the client affinity setting for load balancing.

Solution

Step	Action
1	From the Windows **Start** menu, choose **Settings > Network Connections**.
2	Right-click **Local Area Connection**, and then click **Properties**.
3	In the Local Connection Properties dialog box, click **Network Load Balancing**, and then click **Properties**. The Network Load Balancing Properties dialog box appears.
4	Click the **Port Rules** tab.
5	Click the rule within the list of rules to display the rule parameters in the configuration area above the list of rules.
6	In the **Affinity** list, choose **Single**. The default value is None.
7	Click **Modify**.
8	Click **OK**. Network Load Balancing stops (if it is running), reloads the parameters, and then restarts cluster operations.

—End—

Note: All host servers in the cluster you are using for load balancing must use the same port rules.

Symptom: Web browser problems

The Web browser does not work properly.

My CallPilot checks to see whether the user's browser has JavaScript and cookies enabled. The user can experience problems if an unsupported plug-in attempts to play the WAV voice files or view the TIFF-F fax messages. You must disable unsupported plug-ins.

Solution

If you encounter problems, verify which plug-ins are installed.

Remove the plug-in that is causing the problem.

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Symptom: Playing and viewing messages (MIME-type applications)

There are problems with playing or viewing messages.

Applications that are associated with a MIME type are those used to play or view data of the MIME type. Ensure that the application you want to use to play or view the data is the application that is associated with the MIME type of that data.

Data	MIME type
CallPilot VBK	audio/x-nortel-vbk
CallPilot TIFF	image/tiff
WAV	audio/x-wav

Note: Internet Explorer uses the Windows file associations.

Solution

Step	Action
1	To view and edit these associations, open Windows Explorer, and then choose **View > Folder Options**. ***Note:*** Users require version 6.01 or later of the Microsoft Media Player if they want to play voice messages in WAV format.
2	Click the **File Types** tab.

—End—

Symptom: Playing and viewing messages (Plug-ins)

There are problems with playing or viewing messages.

Some users have plug-ins installed that attempt to play or view data of MIME type audio/x-wav and imaging/tiff. You can disable these plug-ins.

Solution

Step	Action
1	To view and edit these associations, open Windows Explorer, and then choose **View > Folder Options**. ***Note:*** Users require version 6.01 or later of the Microsoft Media Player or CallPilot Player to play messages in WAV format.
2	Click the **File Types** tab.

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—End—

Symptom: Access permissions

All browsers must be able to access My CallPilot files and directories on the Web server. The Web server runs each client connection as if it is a local user. The particular local user that the Web server uses is configured in IIS administration.

Solution

You must ensure that all files and directories have the appropriate access privileges for this user.

To determine the IIS user for access control purposes, see the instructions for your version of IIS.

Step	Action
1	Start IIS administration.
2	Select the Web site that contains the My CallPilot virtual directory from the IIS tree view. ***Note:*** The default is Default Web site.
3	Right-click the site, and then choose **Properties > Directory security** tab.
4	Under **Anonymous Access and Authentication Control**, click **Edit**.
5	Ensure that the **Allow Anonymous Access** check box is selected.
6	Select **Edit** to view the User ID.

—End—

In addition to the files in the My CallPilot directory, certain system files must be accessible from the application. A standard My CallPilot installation on a clean NT server platform has all the necessary permissions set up properly.

If you suspect that additional file permission problems exist, check the procedure in article Q16133 described in the Microsoft Knowledge Base.

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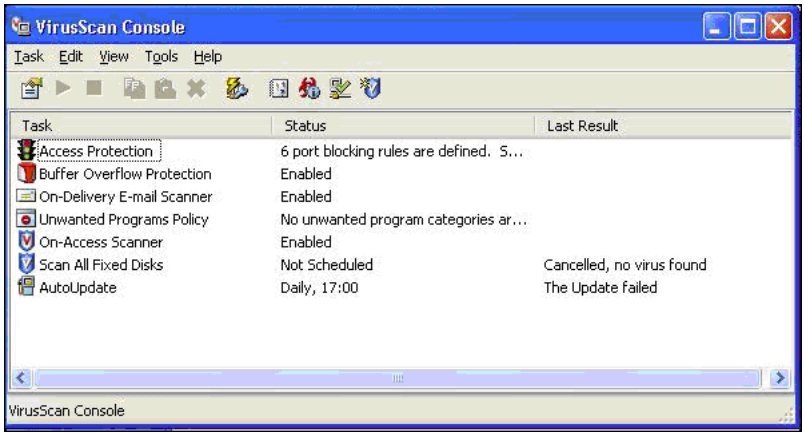
Symptom: You receive an error that the CallPilot server cannot be found when sending a fax on a computer that is running McAfee Virus Enterprise 8.0.0.

Solution:
If McAfee Virus Scan is installed, you can encounter problems when you send faxes. When you attempt to send a fax, the following error message appears:

To send a fax you must amend Virus Scan. To do this, right-click on the Virus Scan icon on the task bar, and open the VirusScan Console.



Right-click on **Access Protection** and select View Log. The following is an example of a blocked fax.

3/9/2005 4:16:44 PM Blocked by port blocking rule nmquick.exe

Prevent mass mailing worms from sending mail 10.10.10.111

To send a fax, right-click **Access Protection** and select **Properties**. The Access Protection Properties dialog box appears.

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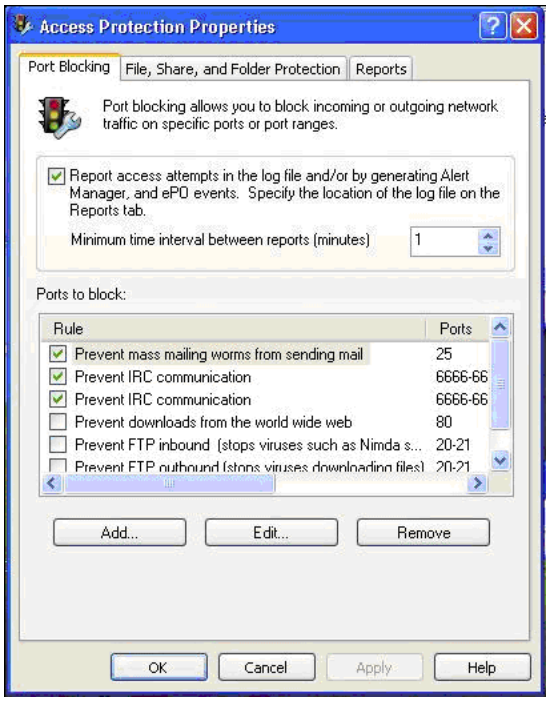
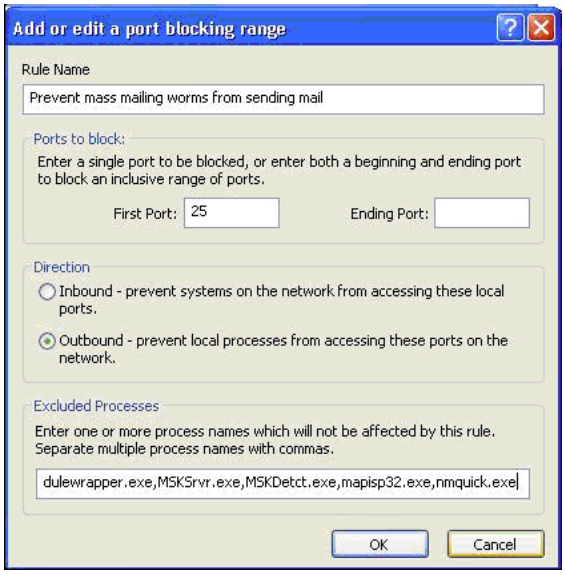


To prevent the system from being abused and sending mass mailings and worms, select **Prevent mass mailing worms from sending mail** and click **Edit**. The *Add or edit a port blockage range* dialog box appears.



At the bottom of the **Add or edit a port blocking range**, in the Excluded Process, add nmquick.exe.

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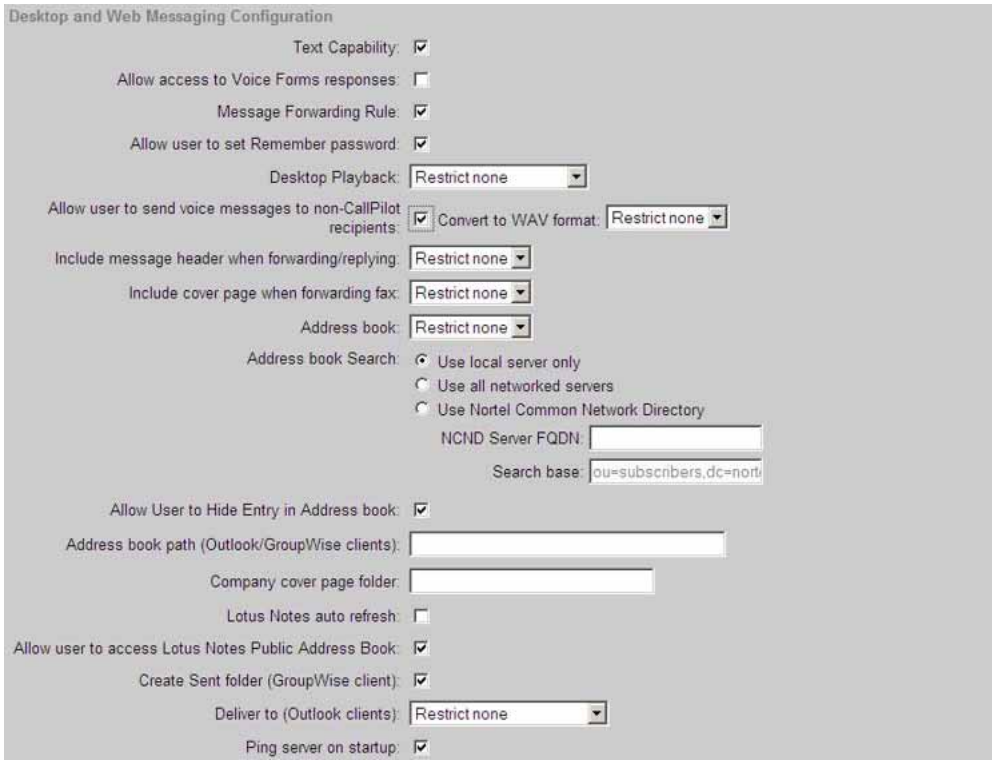
Symptom: Cannot change the audio selection from My CallPilot preferences.

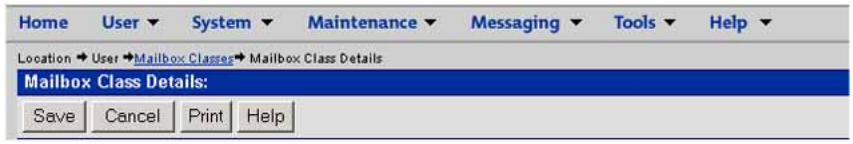
If the **Allow user to send voice messages to non-Callpilot recipients** in the CallPilot Manager Class of Service settings is not selected you must use the Nortel VBK player to play voice messages. If you can chose the WAV player, then you can save the WAV file and send it to non-CallPilot recipients.



Solution:

To allow users to send voice messages to non-CallPilot users and to permit users to change their audio selection:

Step	Action
1	Click **User > Mailbox Classes > Mailbox Class Details**.



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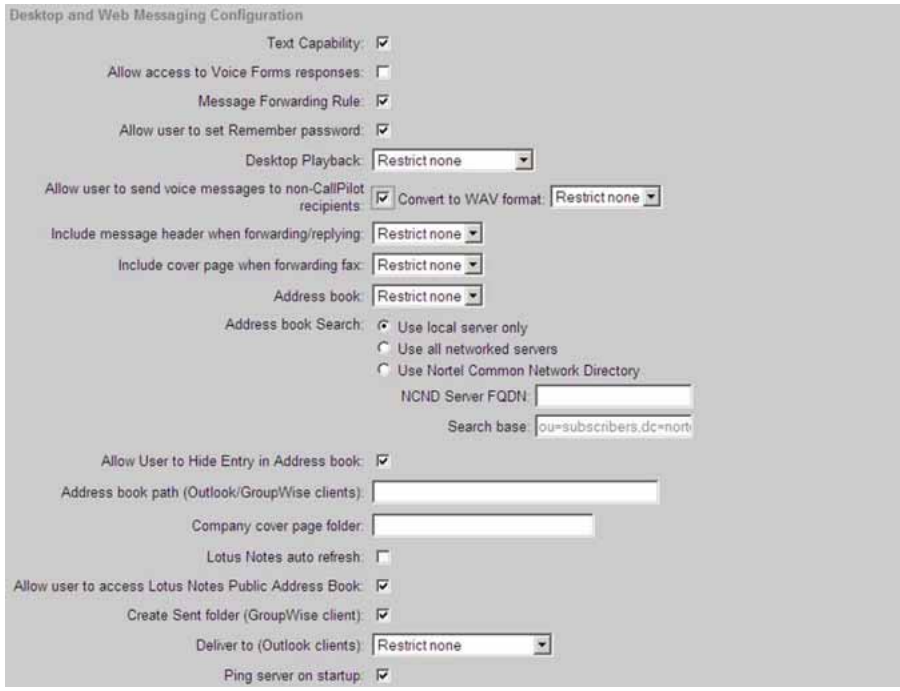
2 Select the **Allow user to send voice message to non-CallPilot recipients** check box.



3 Click **Save**.

Note: If you do not select Allow user to send voice messages to non-CallPilot recipients, the user cannot forward voice messages to non-CallPilot recipients. However, the user can forward voice messages to addresses in CallPilot format.

—End—

Symptom: The **Use Windows/MSN Messenger** check box on the **General** tab of the **CallPilot Desktop Messaging Properties** dialog box appears dimmed.

Solution:

If the Windows MSN Messenger application is installed on the user's PC, but the **Use Windows/MSN Messenger** check box on the **General** tab of the **CallPilot Desktop Messaging Properties** dialog box appears dimmed, check the following settings in the registry file. The computer can have both or only one of these settings.

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[HKEY_CURRENT_USER\Software\Policies\Microsoft\Messenger\Client\PreventRun] [HKEY_LOCAL_MACHINE\Software\Policies\Microsoft\Messenger\Client\PreventRun]

If the setting is [PreventRun=dword:00000001], the user's Software Policy prevents the Messenger client from being started from an application (such as the CallPilot desktop client).

To enable the check box and Instant Messaging feature in the Desktop client, the setting or settings are as follows: [PreventRun=dword:00000000].

Before changing this setting, you must contact the network administrator. Enabling access to Instant Messaging can be a violation of company policy.

> ***Note:*** Nortel recommends that you make a backup of the registry before you make any changes.

Symptom: When you install the new upgrade, the desktop clients that were previously disabled remain disabled, even if the new customized installation specifies to install them.

Solution:

You must rerun the CallPilot installer to add CallPilot software for the previously disabled desktop clients. You can manually run the installer to modify the installation, or you can run the installer from the command line. If you run the installer from the command line, use the \VADDLOCAL= option to install software for the previously used or new desktop clients. Valid options are:

- **\VADDLOCAL=Outlook**--Add Microsoft Outlook client
- **\VADDLOCAL=GroupWise**--Add Novell GroupWise client
- **\VADDLOCAL=Notes**--Add Lotus Notes client
- **\VADDLOCAL=Internet**--Add Internet Mail client
- **\VADDLOCAL=All**--Add all valid clients

These options are only useful for installing previously disabled e-mail clients on the user's computer after the CallPilot 5.0 desktop client is installed.

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Nortel CallPilot

Desktop Messaging and My CallPilot Installation and Administration

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