NØRTEL NETWORKS™

CallPilot™

Release 2.5

Desktop Messaging User Guide

for Microsoft Outlook

Updates to the
Desktop Messaging User Guides

Internet Clients

Page 7 Call the sender of a message

Call the sender of a message is not supported.

Page 7 Access web-based My CallPilot to view user information and change your feature settings

My CallPilot is not supported.

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The Internet mail clients that are supported are:

- Microsoft Outlook 2000 (Internet mail mode)
- Microsoft Outlook 2002 (XP) (Internet mail mode)
- Microsoft Outlook 2003 (Internet mail mode)
- Microsoft Outlook Express - 5.x and 6.x
- Netscape Messenger (Netscape Communicator) - 6.2x
- Netscape Mail - 7.0x
- Qualcomm Eudora Pro - 6.1.2

Citrix (Terminal server) functionality is supported.

Page 11 CallPilot Player

The Call the sender button is not available.

Page 11 To select your telephone or computer to play voice messages

If your telephone is call forwarded to voicemail, cancel this feature before you access your messages from CallPilot Player.

Page 29 Linking to My CallPilot

Linking to My CallPilot is not supported.

About forwarding Desktop Messaging messages

Do not use the right-click menu to forward a Desktop Messaging message. To forward a message, either:

- open the message and forward it from the CallPilot window

  or

- for Outlook, select the message in the Outlook Inbox and forward it from the Outlook toolbar.

Outlook, Lotus Notes, GroupWise

Page 7 Call the sender of a message

Call the sender of a message is not supported.

Page 7 Access web-based My CallPilot to view user information and change your feature settings

My CallPilot is not supported.

Page 8 About this guide

The groupware e-mail clients that are supported are:

- Lotus Notes - 5.x and 6.x
- GroupWise - 6.x
- Microsoft Outlook 2000, 2002 (XP), and 2003

Citrix (Terminal server) functionality is supported.

Page 11 (Page 12 Lotus Notes) CallPilot Player

The Call the sender button is not available.

Page 11 (Page 12 Lotus Notes) To play a message from your telephone

If your telephone is call forwarded to voicemail, cancel this feature before you access your messages from CallPilot Player.

Page 14 (Page15 Lotus Notes) Composing fax and text messages

On the Compose Fax dialog box you can use the Subject field to add additional information to the fax cover page (for example, the name of the recipient) when you send a fax directly to a fax machine. The maximum length you can enter in the Subject field is 80 characters.

Page 27 (Page 28 Lotus Notes) Calling the sender of a message

Calling the sender of a message is not supported.

Page 28 (Page 29 Lotus Notes) Setting message options

Delivery Receipt is not supported.

Page 31 (Page 34 Lotus Notes and Microsoft Outlook) Personal distribution lists

Personal Distribution lists are not supported.

Page 37 (Page 40 Lotus Notes and Page 39 Microsoft Outlook) Linking to My CallPilot

Linking to My CallPilot is not supported.

CallPilot Desktop Messaging User Guide for Microsoft Outlook

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Contents

Welcome to CallPilot

CallPilot from Nortel Networks is an advanced business communications system that offers exceptional flexibility for managing your messaging needs.

You can work with CallPilot from your telephone or your computer. Desktop Messaging gives you access to your CallPilot mailbox through your Microsoft Outlook e-mail. Here are some of the many ways you can use CallPilot with your e-mail:

- Listen to voice messages.
- View and print fax messages.
- Record and send voice messages.
- Create and send fax messages, including batch faxes.
- Forward and reply to voice and fax messages.
- Call the sender of a message.
- Add message options such as urgent and private.
- Add voice, fax, or text file attachments to messages.
- Create personal distribution lists.
- Change your CallPilot password.
- Access web-based My CallPilot to view user information and change your feature settings.

Some features mentioned in this guide may not be available for your CallPilot mailbox. For details, refer to the *Feature availability* topic in the Desktop Messaging online Help, or ask your administrator.

Getting started

About this guide

This user guide describes how to use CallPilot with your Microsoft Outlook e-mail.

The instructions and screen images shown in this guide provide general information for using CallPilot with your e-mail. Specific details may vary depending on your computer's operating system, the version of Outlook you are using, and the features available for your CallPilot mailbox.

For further assistance in using CallPilot, refer to the Desktop Messaging online Help.

What you need

Before you start to use CallPilot, your administrator ensures that your e-mail account is correctly configured for CallPilot. Your computer must be set up according to the following requirements:

- CallPilot Player to play and record voice messages
- Nortel Fax Driver to create faxes
- Microsoft Outlook 98 or 2000 (SR-2) in corporate mode, or Microsoft Outlook 2002 (SR-2) groupware e-mail clients
- Windows 98 SE, Windows 2000 Professional, or Windows XP
- Monitor with 256-color 800 x 600 capability
- 15 Mbytes of free disk space to install software
- Sound card and speakers for playing voice messages on your computer
- A microphone connected to your computer, or a telephone situated near your computer, for recording voice messages
- A LAN (Ethernet), ISDN, ADSL, or dial-up modem connection to the CallPilot server for accessing CallPilot messages
- Internet Explorer 5.x and 6.x, or Netscape 6.2x and above, to access My CallPilot

Logging in

When you log in to your e-mail, you can log in to CallPilot at the same time.

To log in from Microsoft Outlook

1 Open your Microsoft Outlook e-mail. The CallPilot Logon dialog box appears.

2 In Mailbox, type or select your mailbox number.

3 In Password, type your CallPilot password.

4 Check **Remember password** if you want CallPilot to log in automatically.

5 Click **OK**.

CallPilot Logon - na42349.us.nortel.com

Mailbox: 1469

Password:

☐ Remember password

OK   Cancel   Properties
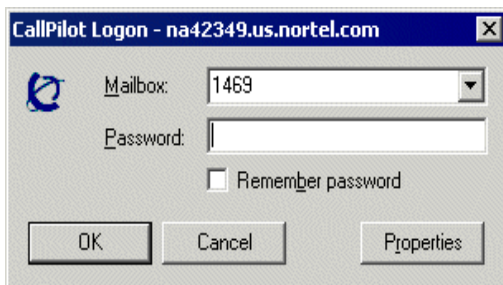
Note: Do not leave the Remember password box checked on a shared computer.

To log out

When you exit Microsoft Outlook, you automatically log out from CallPilot.
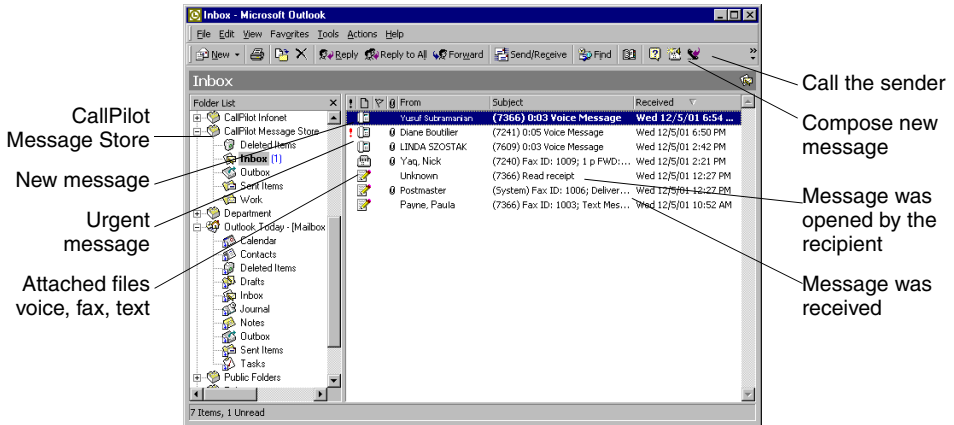
Remote login

You can log in to your mailbox from any computer that has CallPilot installed and configured in the same way as your office computer. For example, you can use a computer set up for guest access, or your home computer with a dial-up connection to the server.

Working with your CallPilot messages

When you open your e-mail with CallPilot installed, your CallPilot messages appear in the CallPilot Message Store. The Message Store contains folders for your CallPilot Inbox, Outbox, Sent Items, and Deleted Items.

Your CallPilot Inbox

CallPilot Message Store

New message

Urgent message

Attached files voice, fax, text

Call the sender

Compose new message

Message was opened by the recipient

Message was received

To check for new messages

The CallPilot message waiting indicator on your screen turns red when you have a new message. To turn the indicator on or off, see *Changing mail delivery settings*, page 39. New messages appear in bold.

To open a message

To open a CallPilot message, double-click anywhere on the message line. See *Playing voice messages*, page 11, and *Viewing fax messages*, page 12.

To delete a message

To delete a CallPilot message in your Inbox, click on the message to select it, then click the Delete icon on the toolbar. You can also click the Delete icon in an open CallPilot message. The deleted message moves to the Deleted Items folder. When you log out or click Exit from Outlook, your CallPilot messages in the Deleted Items folder are immediately deleted without confirmation.

To organize your messages

To organize your messages, you can create new CallPilot folders in the CallPilot Message Store, and move or copy your messages to these folders. You can access these message when you log in by telephone or through My CallPilot.

Playing voice messages

When you open a voice-only message, the CallPilot Player appears. In mixed voice and fax or text messages, click the Voice icon to open the CallPilot Player.

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

You can choose to play your voice messages from your telephone or your computer. To change from one to the other, or to change the telephone number that CallPilot dials, see *Changing audio settings*, page 42. You can also click the Telephone or Computer icon on the CallPilot Player to change the setting.

To play a message from your telephone

1   To play a voice message when your telephone is selected for playback, double-click the message in your CallPilot Inbox and answer your telephone when it rings.
2   Use the buttons on the CallPilot Player to play or stop the message, go backward and forward, and call the sender.
3   When you are finished, hang up and close the message.

To play a message from your computer

1   To play a voice message when your computer is selected for playback, double-click the message in your CallPilot Inbox. The message plays through your computer's speakers or your headphones.
2   Use the buttons on the CallPilot Player to play or stop the message, go backward and forward, adjust the volume and speed, and call the sender.
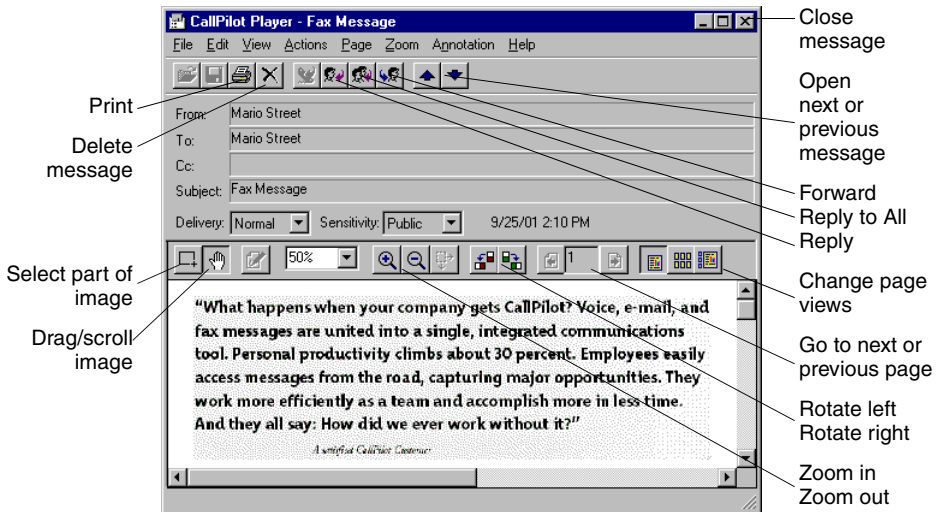3   When you are finished, close the message.
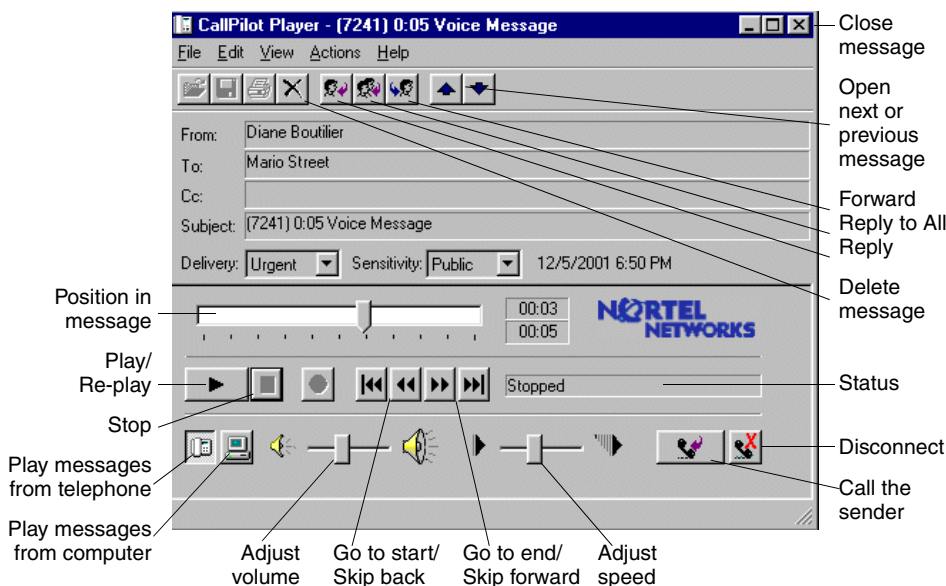
Viewing fax messages

Note: In order to receive faxes, your CallPilot administrator must enable fax capability for your mailbox.

To view a fax message

1 Double-click a fax message in your CallPilot Inbox. When you open a fax-only message, the fax image appears right away. In mixed voice and fax or text messages, click the **Fax** icon to view the fax.

2 While viewing the fax, you can enlarge or reduce the image, rotate or move it, print it, delete it, save it, add a voice annotation to the saved file, forward it and reply to it.

3 When you are finished, close the message.

Labels around the screenshot:
- Close message
- Open next or previous message
- Forward
- Reply to All
- Reply
- Change page views
- Go to next or previous page
- Rotate left / Rotate right
- Zoom in / Zoom out
- Print
- Delete message
- Select part of image
- Drag/scroll image

Screenshot content:

CallPilot Player - Fax Message

File Edit View Actions Page Zoom Annotation Help

From: Mario Street
To: Mario Street
Cc:
Subject: Fax Message
Delivery: Normal   Sensitivity: Public   9/25/01 2:10 PM

50%

"What happens when your company gets CallPilot? Voice, e-mail, and fax messages are united into a single, integrated communications tool. Personal productivity climbs about 30 percent. Employees easily access messages from the road, capturing major opportunities. They work more efficiently as a team and accomplish more in less time. And they all say: How did we ever work without it?"
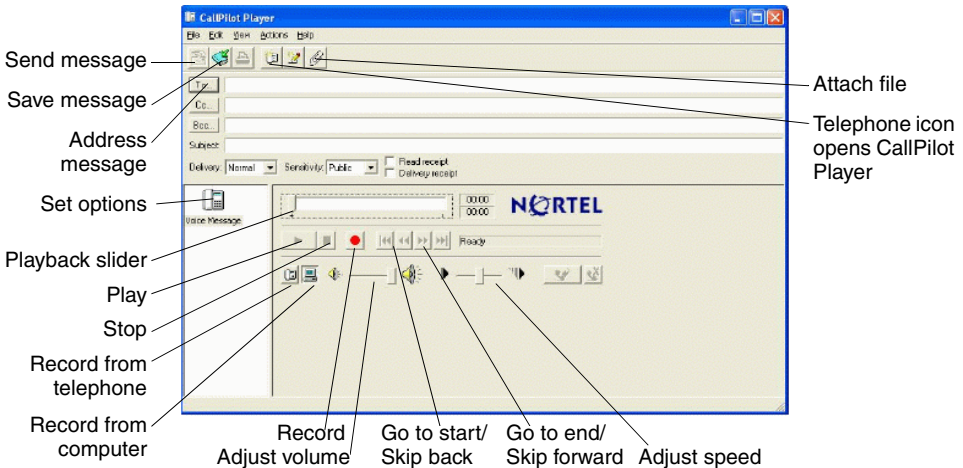
A satisfied CallPilot Customer

Composing voice messages

You can record a voice message from the computer or the telephone, then address and send it the same way as an e-mail message.

To record and send a voice message

1   In your CallPilot Inbox, click the **New CallPilot Message** icon .

2   On the new message form, click the **Telephone** icon in the toolbar to open the CallPilot Player, if it is not already open.

3   On the CallPilot Player, click the red **Record** button to start recording.

4   ▶ If you are recording from the computer, record your message into the microphone. Click **Stop** to end the recording. Click **Play** to review it. To add to the recording, click **Record**, speak again, then click **Stop**.

    ▶ If you are recording from the telephone, answer when it rings. At the tone, record your message. Click **Stop** to end the recording. Click **Play** to review it.

5   Click **To…** to address from the CallPilot, e-mail, or any Address Book. See *Addressing messages*, page 31. Or type a formatted address in the **To...** field.

6   Add attachments and options if required. See *Adding attachments to messages*, page 30, and *Setting message options*, page 30.

7   On the toolbar, click the **Send Message** icon.

Send message —
Save message —
Address message —
Set options —
Playback slider —
Play —
Stop —
Record from telephone —
Record from computer —
Record / Adjust volume —
Go to start/ Skip back —
Go to end/ Skip forward —
Adjust speed —
Attach file —
Telephone icon opens CallPilot Player —

To save a newly created voice message as a file

1   On a new message form, record a message, and on the File menu, click **Save as...** .

2   In the File name box, type a name for the file, select a folder to keep the file in, then click Save. Save voice files as .vbk files. Note: CallPilot automatically converts .vbk files to .wav files when sending to non-CallPilot users. See *Changing mail delivery settings*, page 39.

Composing fax and text messages

To create and send a single fax message

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

1 Open the document that you want to fax. It must be 8.5 in. (21.5 cm) wide or less.
2 On the File menu, select **Print**.
3 From the list of printers, select **Nortel Fax**, then click **Print** or **OK**.
4 The Compose Fax dialog box appears. Before sending the fax, you can add more documents by repeating steps 1 to 3. You can also choose to include a cover page, view the fax, and save it as a file for later transmission.
5 Select an appropriate **Send using...** option.
▸ To send a simple fax, type the fax machine number(s) or CallPilot mailbox number ('m' plus number, for example, m7366) in the **Fax machine(s)** field, type a subject in the **Subject** field, then click **Send**.
▸ To send your fax as an attachment to a new CallPilot message, select **CallPilot Desktop Messaging for MS Outlook** under **Send using**, then click **Send**.

A new message form opens with your fax file attached. Address the message from the CallPilot, e-mail, or any Address Book. See *Addressing messages*, page 31. Or type the formatted address in the **To...** field.

6 Add attachments and options if required. See *Adding attachments to messages*, page 30, and *Setting message options*, page 30.

7 Click **Send Message**.

To create and send a text message

To create a text message, open a new CallPilot message form and type or paste plain text into it, address the message, then click the **Send Message** icon.

Creating and sending fax batch messages

To send customized CallPilot fax messages to multiple recipients you can use Microsoft Word's Mail Merge and send your print job to the Nortel Fax Batch printer. You must be familiar with Microsoft Word's Mail Merge functionality to use this feature. Consult your MS Word documentation. Note that the CallPilot Fax Batch feature is only available to CallPilot Desktop and Web users who install the Nortel Fax Batch Print Driver.

To use Mail Merge with CallPilot, you will need your main document (the file you want to send to your recipients) and a data source document which contains recipient information such as names and fax numbers.

Your Callpilot Desktop Messaging installation includes an example Microsoft Word data source named Data.doc and an example Microsoft Word main document named Sample.doc. Each of these are examined below to explain the batch fax procedure.

Accessing and modifying the example Data source document

The Data.doc file consists of a Microsoft Word table. It is organized in columns, with one row for each recipient. The following column headers exist in the sample: ToFax, ToName, DelReceipt, DelType, ToCompany, and ToPhone. These column headers can be modified, deleted and new columns can be added.   The column header names serve as tags that can be inserted into the main document to customize the fax for each recipient or to direct CallPilot how to handle the fax.

1 Go to \Program Files\Nortel Networks\CallPilot\nda directory and open the Data.doc file.
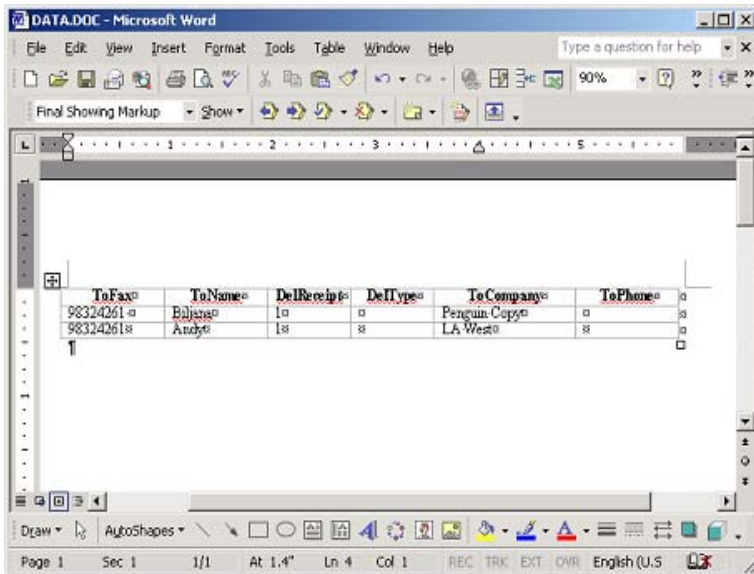
2 Add new columns or subtract existing ones, as required. For new columns, chose a meaningful column header name.

3 Add the required data under each column header. The data source can be created by any means available to populate a Microsoft Word table, including importing information from existing files.

If you edit the recipient list using the Mail Merge utility (i.e. click on Edit in the Data source section of the MS Mail Merge Helper), the Data Form window opens and lists all the entries from the data source table. You can add, delete, modify and search for records in this window. Any column headers that you added or modified in the data source file will automatically appear in this window. Note that the **ToFax** field is the only mandatory field for CallPilot.

The following parameters and characters are supported in the **ToFax** field:

- Maximum supported length for the fax phone number is 120 characters.
- Numbers 0 through 9 are supported.
- Upper and lower case P and the comma are used when a pause is necessary.
- The Pound sign (#) is used by some fax servers and is supported.
- Common phone number symbols such as left and right parentheses and the dash are supported.
- Spaces are supported.
- Upper and lower case M used in front of a CallPilot mailbox number to designate the address as a CallPilot mailbox are supported.

The other fields are optional and are used to customize the fax or to direct CallPilot how to handle it. Three specific CallPilot fields and their parameters are:

- **ToName:** This is the fax recipient's name and can be up to 256 characters in length.
- **DelReceipt:** You can use this tag to receive a Delivery Receipt in the form of a CallPilot message in your CallPilot mailbox when the fax is delivered to the recipient. If the DelReceipt field is set to "1", then a delivery receipt will be generated. If DelReceipt is set to '0', a delivery receipt will not be generated for that recipient. If the DelReceipt field is empty or the field is not in Data.doc, then no delivery receipt will be generated.
- **DelType:** This field may be used to set a delivery priority for each recipient. If the DelType field is set to '0' or is left empty (or if it is not present in your Data.doc), the message will be tagged for Normal delivery. If DelType is set to "1", then the message will be tagged for Economy delivery. If DelType is set to "2", then the message will be tagged for Urgent delivery. Messages sent to non-CallPilot recipients with the Delivery Type set to Economy will be delivered on a schedule defined by the CallPilot server for Economy delivery. Note that messages sent to CallPilot mailboxes will not be affected by the Economy designation and will be sent as Normal messages. Transmission of messages tagged as Normal or Urgent will begin immediately. Urgent messages will display the Urgent icon when displayed

from My CallPilot or a Desktop Messaging client and a voice prompt will identify the message as Urgent from the CallPilot telephone interface. Messages sent Urgent are treated as Normal when they are sent to non-CallPilot addresses.

4 Once the table has been updated, save all changes. You would normally supply a unique name for your data file here, but for the remainder of these procedures the name Data.doc will be used.

5 Close the document. The Data.doc file can now be used as a data source by MS Mail Merge.

## Accessing and modifying the example Main document

The Sample.doc file is an example of a Microsoft Word main document.

1 From the \Program Files\Nortel Networks\CallPilot\nda directory, open Sample.doc in MS Word.

This document contains tagged fields corresponding to those in the example Data.doc file. You can use this as a template for your own fax or just to practise with. If you modified the column header names in Data.doc, you will have to modify them in your main document as well.

First page

The first page of the main document is a special page and does not become part of the final fax. Sample.doc is installed with the first page setup correctly.
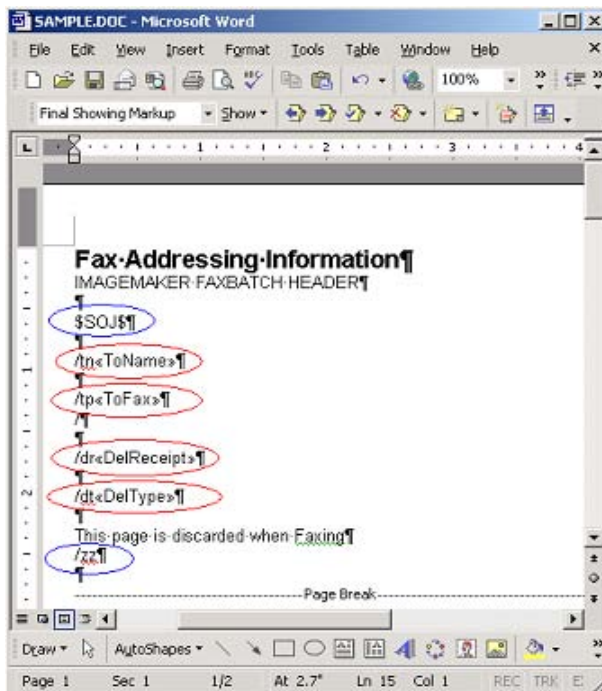
The purpose of this page is to provide a location to map information in the data source to each customized fax document. To signal CallPilot that this as a Fax Batch file and to prevent this page from becoming part of the fax, two special control codes **must** be present on the first page:

SOJ	Start of Job. This control signals the fax driver to start processing and can be placed anywhere on the first page.
/zz	Skip this page. This control can be placed anywhere on the first page and prevents the first page from becoming part of the fax message.

The CallPilot desktop software will retrieve the Fax Number from the first page of the document. Additionally, CallPilot desktop software will retrieve the Recipient Name, the Delivery Receipt and the Delivery Type, if they exist on the first page.

/tp	Fax Number. Used to address the fax message. **This field is required.**
/dr	Delivery Receipt. A Delivery Receipt can be turned on or off for each recipient. **This field is optional.**
/tn	Name of Recipient. This name is used to identify the record in the Nortel Fax Batch Status dialog if the fax number is either missing or invalid. **This field is optional.**
/dt	Delivery Type. Used to mark messages for Normal, Economy or Urgent delivery. **This field is optional.**

To complete the page, the Fax Number column header (i.e. <<ToFax>>) must be inserted after the /tp control using the Mail Merge insert function. Likewise, the Delivery Receipt column header (i.e. <<DelReceipt>>) may be inserted after the /dr control, the Name of Recipient field (i.e. <<ToName>>) may be inserted after the /tn control and the Delivery Type field (i.e. <<DelType>>) may be inserted after the /dt control.

Note: all Fax Batch controls are case sensitive.

As an advanced fax addressing feature, users can also modify all data in a single column without actually modifying the data source file. For example, if an existing data source table contains fax numbers for a large number of recipients, but the external access number '9' is missing, this number can be added to all fax numbers by modifying the control on the first page of the document as follows:

/tp9<<ToFax>>

In this example, a '9' will be added to the beginning of each phone number during fax batch processing. The data source remains unchanged and could be used from a different location which does not require a '9' for external access.

Second page

Once the data source document and the first page of the main document have been created, you can begin to customize your fax. Note that it must be equal to or less than 8.5 inches in width.

You can use all of the data source column header tags to customize the document. The following is an example using the Sample.doc file:
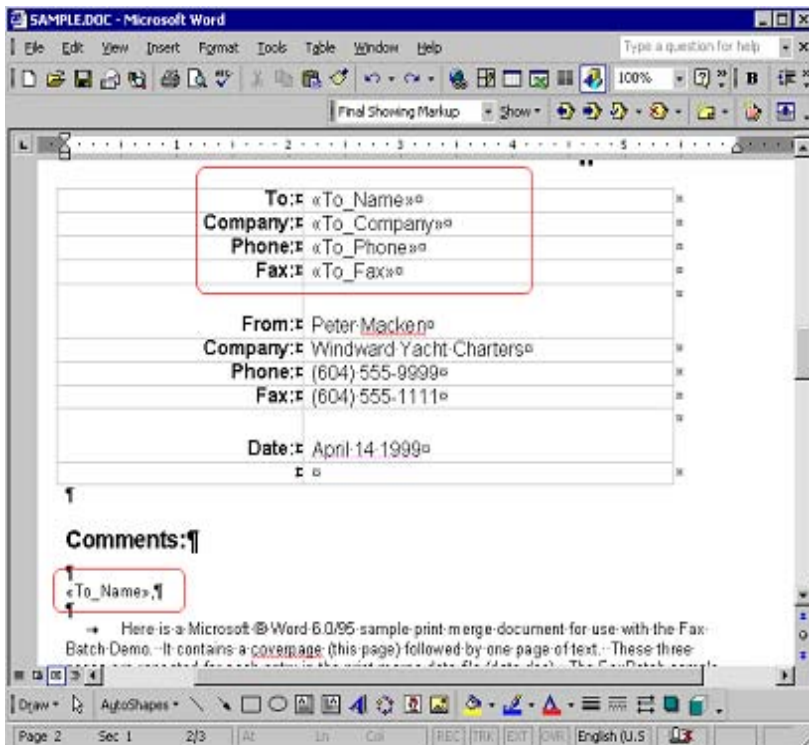
In this example, the document is customized for each recipient. Data source column headers are inserted into the document using the MS Word Mail Merge utility Insert function. After the main document has been customized, it is ready to be merged with the information in the Data.doc file. Consult your MS Word Mail Merge help for more details on inserting data source fields into the document.

Merging data from the Data Source into the Main Document

When you are ready to merge data from the data source file into your main document:

1 Start **Mail Merge** from the MS Word **Tools** menu. Depending on which version of MS Word you are using, Mail Merge will be under different menu headings.

   a. In the Office XP version, select **Tools>Letters and Mailings>Mail Merge Wizard**.

   b. In Office 2000 select **Tools / Mail Merge.**

2 Verify that Sample.doc is currently selected as the main document and that Data.doc is currently selected as the data source.

3 Select **Merge to Printer** and then select the **Nortel Fax Batch** driver from the Print dialog box that appears.
Note: Ensure that MS Word is not set up to print pages in reverse order.

4 Click **OK** in the Print dialog box to initiate the batch fax process.

When the document is merged, data values from the data source file will be merged into the main document at the appropriate tag positions and a separate fax TIF file for each recipient is created. CallPilot desktop software will address and transfer the fax files to the server. The CallPilot server is responsible for actually sending the fax to the recipients.

Once the process starts, the Print Status dialog appears. The page number increments as each page is converted to a TIF file. Since the first page is skipped, this page is not included in the count. For example, if a three page fax is sent to 10 recipients, the dialog box will display "Printing page 1", "Printing page 2", and so on up to "Printing page 20." Only 20 pages are printed because the first page of each document is skipped.

Problems that occur while creating the fax images or with the fax addresses will be displayed in a separate Nortel Fax Batch Status dialog box such as:
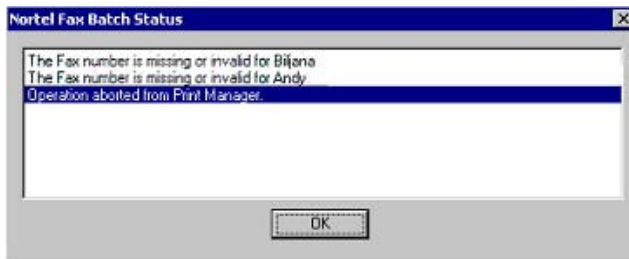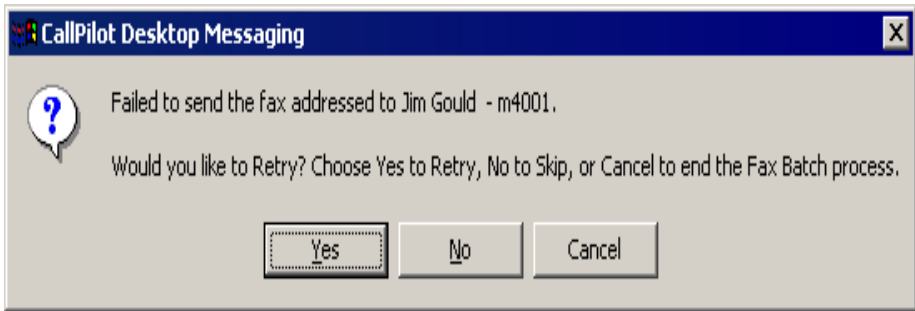

Problems such as a missing fax address or an unsupported fax address format are checked. However, problems such as a wrong fax number will not be identified, provided the number is in a valid format. A wrong fax number will however result in the sending of a non-Delivery receipt to the user's CallPilot mailbox by the CallPilot server.

When you click the OK button, the batch process ends and no faxes are sent. You must then fix the fax address(es) and resubmit the job.

If all faxes and addresses were created properly, a dialog appears while the faxes are being addressed and transferred to the CallPilot Server. It indicates the status of the batch job. If you press Cancel in this dialog box before the job is completed, another dialog box appears asking you to confirm the cancellation. If you select Yes, all temporary files will be deleted and the process ends. However, all faxes that have already transferred to the CallPilot server will be sent.

If a problem occurs while transferring the fax, a dialog similar to the following appears:

CallPilot Desktop Messaging

Failed to send the fax addressed to Jim Gould - m4001.

Would you like to Retry? Choose Yes to Retry, No to Skip, or Cancel to end the Fax Batch process.

[Yes]   [No]   [Cancel]

If you select Yes, an attempt is made to resend the fax to the server. If you select No, the current fax is skipped and processing begins on the next fax in the list. The fax that was skipped will not be sent. If you select Cancel, another dialog box appears asking you to confirm the cancellation. If you choose Yes, all temporary files will be deleted and the process ends. Any faxes that have already been transferred to the CallPilot server will be sent. If you choose No, the failure dialog box shown above will be displayed again, allowing you to make a different choice.

After all the faxes have been successfully transferred to the server, a dialog box will confirm this.

Using custom fax Cover Pages

Callpilot users can choose to include a cover page with their faxes. These are typically designed and managed by the server administrator. The user simply chooses the desired style of cover page (if more than one is available).

Cover pages generally include the following information:

From Information:	Title	Name	Department	Company
	Phone number	Fax number		
To Information:	Title	Name	Department	Company
	Phone number	Fax number		

Number of Pages

Sent Date & Time

A Cover Sheet Memo section

CallPilot Configuration

The CallPilot Desktop Messaging Configuration page includes an option labelled "Include cover page when forwarding fax message". The default value for this is unchecked, meaning that a cover page will not be added to the message.
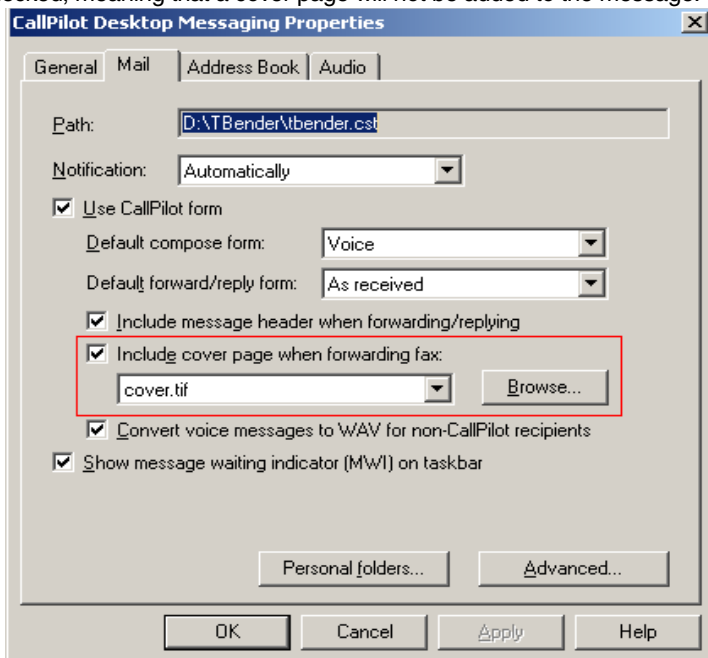
If you select this option, you can then choose and set a default cover page from a list of available cover pages. Use the **Browse…** button to choose the location where the cover

pages are stored. The default location is: \\Program Files\Nortel Networks\ CallPilot\cvrpages.

CallPilot Desktop Messaging Custom form

The CallPilot Desktop Messaging Custom Fax Forward form contains a menu item named **Cover page**, which contains two submenus items: **Add** and **Modify**.
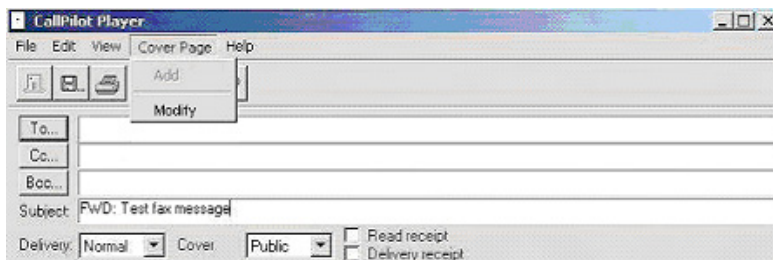

The **Add** menu displays a list of existing cover pages available to use. You can select one of these and click **OK**.
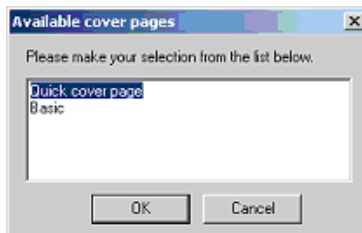

The **Modify** menu displays the current cover page content and lets you modify it. From the "Modify" window, you can also preview the current cover page.

If you enabled the **Include cover page…** option, CallPilot Desktop Messaging will add the selected cover page to the Fax Forward form. The cover page will appear as the first attachment on the list of attachments (left pane). The Attachment's view (right pane) will contain only the Cover Sheet Memo section of the cover page. You can include any additional required information here.
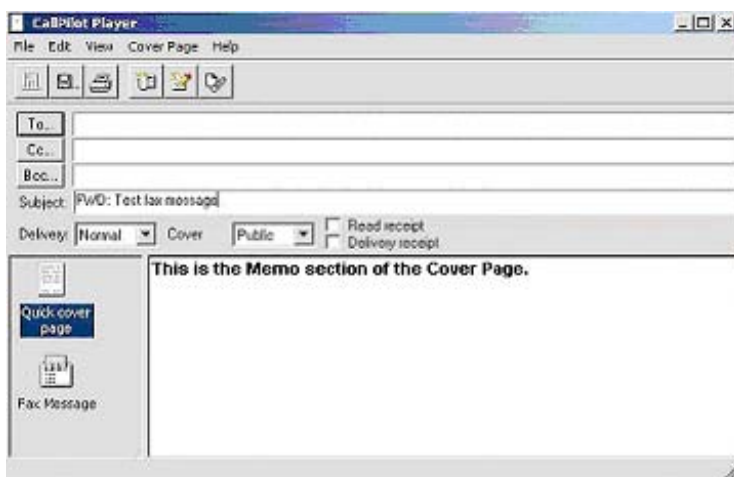
Nortel Fax Printer Driver form

You can use the Nortel Fax Printer form to send a fax message using either a CallPilot Desktop messaging client (such as MS Outlook) or the QuickFax feature. The QuickFax feature allows you to send a fax directly from the print dialog box. If you choose to send your fax using a CallPilot Desktop Messaging client, the cover page will be available from the CallPilot Custom form.
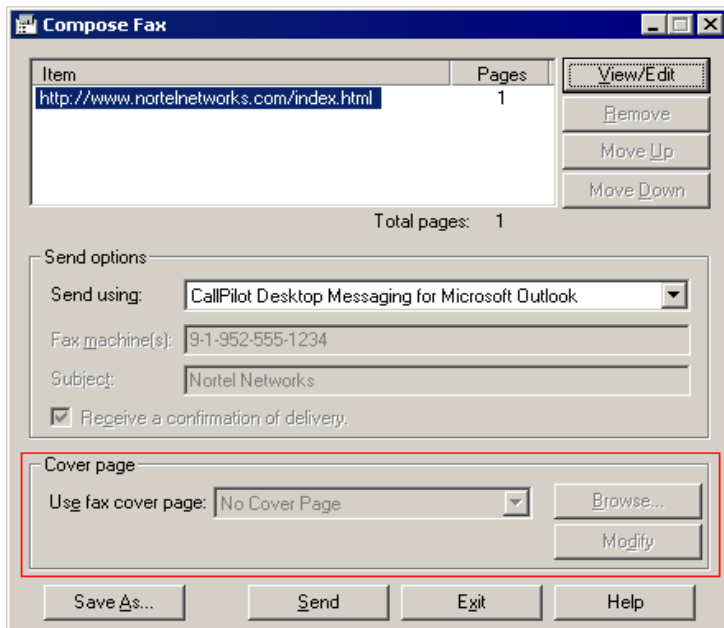
If you choose to send your fax to a specific destination (for example, a fax machine), the **Cover page** field becomes active and lets you browse for a cover page and/or select one from the dropdown list. You can then modify its contents. This provides functionality similar to the Custom form. (Refer to the following section for details.) You can also choose not to include a cover page by selecting the **No cover page** option from the **Use fax cover page** dropdown list.

Note that you can also include a Subject line here. The Subject field information will however only be displayed in the e-mail portion of the fax. It will not be displayed on a hard copy of the fax.

Modify and Preview cover page

You can preview the current cover page and modify its contents from both the CallPilot

Custom form and the Nortel Fax Printer driver application.

Click on **Preview** to view the current state of the cover page.

The first time you access this page, CallPilot Desktop Messaging will try to fill in the From section using information from the registry. Desktop Messaging will remember the data that you entered into this section and automatically complete those fields the next time you use this page. Although the From information is automatically populated from the registry, you can still change it.

In the To section, one field will always be read only - the Fax field. CallPilot will populate it using address information from the Custom or Fax Driver forms. The Name field is read-only if the cover page is used from the Custom form. In this case, CallPilot will automatically fill it using the recipient's name. If you use the Fax Printer driver instead, this field is left empty and you can complete it.

 If a cover page is used from the Fax Printer driver, CallPilot Desktop Messaging computes the number of pages and enters this information in the Pages field. When you use the Custom form, the Pages field is left empty. You can modify this field in either case.

The Sent field uses the current time and date by default. This field is also editable.

The Memo section is in synch with the Memo section of the Custom form.

Note that the maximum length of all cover page fields except the Memo fied is 30 characters. The maximum length of the Memo field is 2500 characters.

Calling the sender of a message

You can respond to a CallPilot message or an MS Outlook message with a telephone call instead of a recorded message.

Note: When the message is answered from within MS Outlook, that program must be able to find the sender of the e-mail message within an existing address book. This works well whenever a message originates from an MS Exchange Server. However, MS Outlook may not be able to determine the sender when an Outlook message originates from an external SMTP server.

1 Select a message in your CallPilot or Microsoft Outlook Inbox.

2 Click the **Call Sender** toolbar icon.

‣ Since the e-mail sender's address book entry may contain multiple numbers, all telephone numbers that can be found for the sender are presented to you in the Call Sender dialog. Choose the appropriate number and press the **Call Sender** button. The CallPilot Desktop client will attempt to remember changes you make.

3 Answer the telephone when it rings. CallPilot immediately calls the sender of the message.

4 When you finish the call, hang up the telephone or click **Disconnect**.

Forwarding and replying to messages

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

To forward or reply to a message

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

> 🦋 Reply 🦋 Reply to All 🦋 Forward
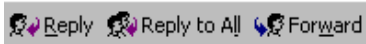
2 On the new message form, compose a voice, fax, or text message.

3 Address forwarded messages the same way as a new message. Replies are addressed automatically.

4 Add attachments, set options, and change the subject line if required.

5 Click the **Send Message** icon.
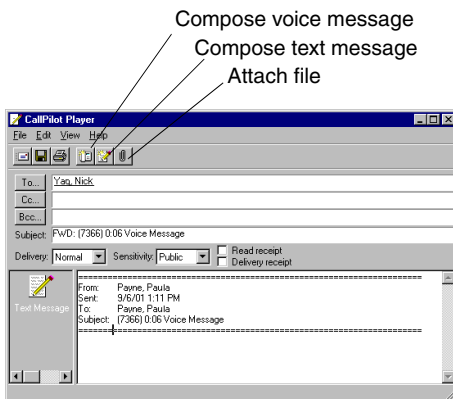
Note: Your administrator may block messages forwarded to external e-mail addresses.

Compose voice message
Compose text message
Attach file

Adding attachments to messages

Before sending a message, you can attach a voice, fax, or text file to it. Voice files can be .vbk or .wav format for CallPilot recipients; CallPilot can automatically convert .vbk files to .wav files when sending to non-CallPilot users. See *Changing mail delivery settings*, page 39. Fax files must be .tif format. Text files must be .txt format.

To attach a file to a message

1 On a new message form, click the **Attach File** icon.

2 In the **Open** dialog box, select or type the name of the file that you want to attach.

3 Click **Open** to attach the file and return to the new CallPilot message.
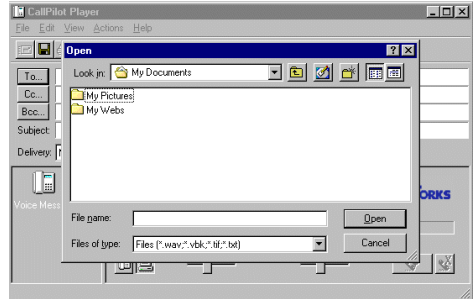
Setting message options

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

To set message options

1 On a new message form, select **Delivery, Sensitivity**, and **Receipt** options, as required.

▸ For **Delivery**, select **Urgent**, or leave the setting as **Normal**.

▸ For **Sensitivity**, select **Private**, or leave the setting as **Public**.

Note that when you send a message marked **Private**, your recipient may still forward it to someone else, if they are not a CallPilot user. Also, recipients in non-CallPilot systems will not be informed of Private settings. In your message, tell the recipient that the message is Private.

▸ For Receipt acknowledgment, check **Read receipt** to request acknowledgment that your recipient opened the message. Check **Delivery receipt** to request acknowledgment that your recipient received the message.

2 Continue to compose, address, and send the message as usual.

Addressing messages

Entries in the Microsoft Outlook Contacts list contain information such as: e-mail addresses, fax numbers, and telephone numbers. CallPilot allows you to use the fax and telephone number fields in the Outlook Contacts list when the e-mail address is not a Microsoft Exchange Server or CallPilot Server address.

To address a message from an Address Book

You can address a CallPilot message from the Address Book on the server, or you can select addresses from any available Address Book.

- The CallPilot Address Book on the server is maintained by your organization, and contains the addresses of the CallPilot users and distribution lists that you are allowed to use. You cannot edit this list. You can download the Address Book to your computer so that you can work in offline mode. See *Changing your address book settings*, page 41.
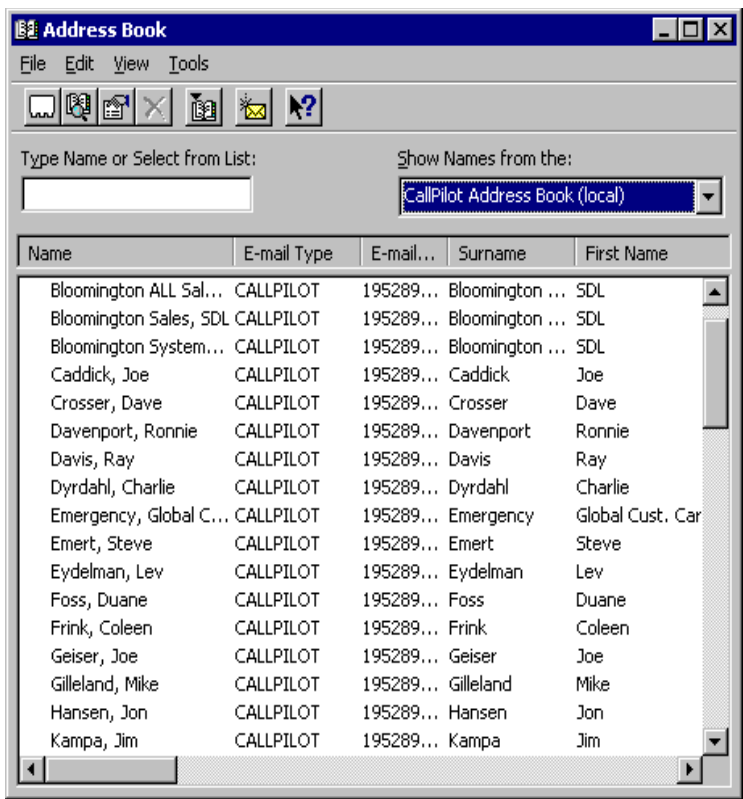
- Your Personal Address Book is the list of e-mail addresses that you maintain on your computer. You can add CallPilot addresses to this list.

1. In a new CallPilot message, click **To…** .
2. In the **Show names** list, select **CallPilot Address Book**, **Personal Address Book** or **Outlook Address Book - Contacts.**.
3. Select the name of the recipient or distribution list.
4. Click **To ->**. You can select one or more addresses, clicking **To ->** after each one.
5. Click **OK** to return to the new CallPilot message once the recipients have been chosen.

E-mail addresses versus Fax/Telephone numbers

The CallPilot Desktop client will always attempt to find a CallPilot or MS Exchange Server address when sending a message to a recipient. Using either a CallPilot or MS Exchange Server address is the safest mechanism for message transmission, since it guarantees the entire message can be sent and requires no user interaction. However, if a CallPilot or MS Exchange Server address cannot be found, the desktop client determines the message data type (voice, TIF, and/or text) and takes one of the following actions:

Mixed Media messages

If mixed media is detected (voice/TIF or voice/text; note that TIF/text is not considered mixed media), the message will be sent to the recipient's e-mail address. If an e-mail address cannot be found, a Non-Delivery Notification (NDN) is generated for that recipient. The desktop client cannot send mixed media messages to a telephone or fax number.

Single Media messages

If voice only or tif/text only data is detected, the desktop client scans the recipient for an e-mail address and telephone/fax numbers. The desktop client scans for telephone numbers if the data is voice only or for fax numbers if the data is tif/text only.

If an e-mail address is found without telephone/fax numbers, the message will be sent without additional user interaction. If neither an e-mail address nor a telephone/fax number can be found, an NDN is generated.

If a telephone or fax number is found, the CallPilot Recipient dialog box is displayed and you will be prompted to pick the final destination. You must modify the selected number in the Verify number field to ensure proper delivery. You can also pick an e-mail address (if available), but cannot modify it.

Validating Telephone and Fax Numbers

The original telephone or fax number may contain any alphanumeric character. This includes special dialing prefixes such as + for international numbers or abbreviations such as ESN to denote internal calls. However, you must modify the selected number in the Verify number field of the CallPilot Recipient dialog box to ensure proper delivery. The modified number can only contain the following alphanumeric characters:

Numeric characters 0123456789
Numeric Delimiters ( ) -
Pause characters Pp,
Octothorpe #

White space

The CallPilot Desktop client will attempt to remember changes you make. This should prevent you from repeatedly having to make the same changes each time the same telephone or fax number is used.

Note that the ability to dial any telephone or fax number may be restricted by the CallPilot server.

Note also that the ability to scan for telephone or fax numbers is only available in the CallPilot Custom form. The standard e-mail form will not scan for these numbers. If a CallPilot or e-mail address is missing from a recipient in the standard e-mail form, an NDN is generated for that recipient.

To address a message manually

You can type an address directly into the To field of a new message. Enclose the address in square brackets. Refer to the Required format for a CallPilot E-mail address section on page 34 for the correct addressing formats.

To add CallPilot addresses to your Personal Address Book or Outlook Contacts

You can add CallPilot addresses and distribution lists to your e-mail Personal Address Book. You may want to distinguish between CallPilot and e-mail addresses by adding CallPilot after the recipient's name.

1 Open the address book from Microsoft Outlook and click on the **New Entry** toolbar icon.
2 You will then be prompted to select the entry type. Select **New Contact** to create a new entry in the Microsoft Outlook Contacts.
‣ A new **Untitled - Contact** dialog box is displayed. The two areas used by

CallPilot are the contact information and e-mail fields.

3 You can choose to enter a CallPilot address in the E-mail field or fax/telephone numbers in the contact fields. You can fill in all fields, but the desktop client will ignore all fax and telephone numbers if the E-mail field contains a Microsoft Exchange Server or CallPilot Server address.

Required format for a CallPilot E-mail address

If you choose to enter a CallPilot addresses in the E-mail field, it must be entered in the following format:

[CALLPILOT:XXXXYYYY@ZZZZ]

Where:
XXXX = SMTP/VPIM prefix
YYYY = CallPilot Mailbox number
ZZZZ = CallPilot Server FQDN (server and domain)

For example, suppose CallPilot server "na42349" in the domain "us.nortel.com" with VPIM/SMTP prefix "1952897" contains mailbox "7404". Then the CallPilot address for that mailbox would be:

[CALLPILOT:19528977404@na42349.us.nortel.com]

Required format for Fax and Telephone Numbers

If you choose to enter a fax or telephone number in the contact field(s), it must be entered as an alphanumeric string. Pause (P p ,) and octothorpe (#) characters are supported.

The required format is:

[CALLPILOT:XXXX@ZZZZ]

Where:
XXXX = Telephone or fax number
ZZZZ = CallPilot Server FQDN (server and domain)

Examples of valid fax and telephone number formats are:

[CALLPILOT:7404@na42349.us.nortel.com]
[CALLPILOT:(416) 697-7321@na42349.us.nortel.com]
[CALLPILOT:(416) 697-7321,7404@na42349.us.nortel.com]
[CALLPILOT:(416) 697-7321p7404@na42349.us.nortel.com]
[CALLPILOT:(800) 921-1342#123123@na42349.us.nortel.com]

Microsoft Outlook supports telephone and fax contact numbers for business, home, car, etc. Some contact numbers are not supported. Note that contact numbers are a feature of Microsoft Outlook; CallPilot Desktop Messaging cannot hide or alter unsupported items. The supported and unsupported numbers are shown following:

Valid Voice Contact Numbers

Valid Fax Contact Numbers

Unsupported Contact Numbers

Personal distribution lists

There are two types of Personal Distribution Lists (PDL) you can use:

- CallPilot PDL, which can be created using My CallPilot or the telephone
- Local distribution lists which can be created from MS Outlook in personal address books. Note that this type is not accessible from telephone interface.

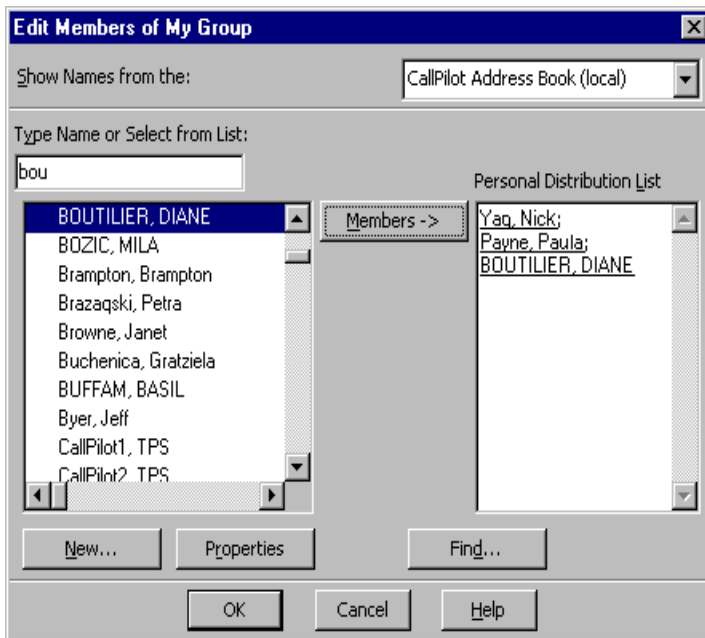## To use existing CallPilot personal distribution lists

You can address messages using CallPilot personal distribution lists that you created in My CallPilot or on your telephone. In Outlook, select these lists from the CallPilot Address Book or add them to your personal Address Book.

To create a personal distribution list in Outlook

You create a CallPilot personal distribution list in Outlook the same way that you create an e-mail personal distribution list. After you create a list, it appears in your e-mail Personal Address Book so that you can select the list to address a message. You cannot access a list created in Outlook from your telephone or from My CallPilot.

1. In your Inbox, on the **Tools** menu, click **Address Book**.
2. Select **Personal Address Book**, and from the **File** menu, click **New Entry**.
3. Select **Personal Distribution List**, and click **OK**.
4. In **New Personal Distribution List Properties**, in **Name**, type a list name.
5. Click **Add/Remove Members…** to display Edit New Personal Distribution List Members.
6. Scroll to CallPilot Address Book and select it. Select names to add to the Distribution List, clicking **Members ->** after each name.
7. Click **OK** when you have finished entering names.

8 Click **OK** after viewing the list.
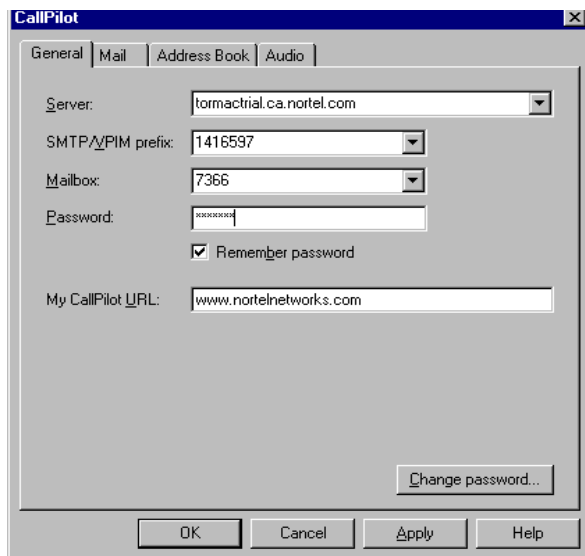You can add or delete names for this list at any time.

Edit Members of My Group	✕

Show Names from the: CallPilot Address Book (local) ▾

Type Name or Select from List:

bou

Personal Distribution List

BOUTILIER, DIANE ▲		Members ->		Yaq, Nick; ▲
BOZIC, MILA				Payne, Paula;
Brampton, Brampton				BOUTILIER, DIANE
Brazaqski, Petra				
Browne, Janet				
Buchenica, Gratziela				
BUFFAM, BASIL				
Byer, Jeff				
CallPilot1, TPS				
CallPilot2, TPS ▼				▼

◀ ▶

| New... | | Properties | | Find... |

| OK | | Cancel | | Help |

Changing your mailbox settings

To view or change your CallPilot access settings

Your administrator enters the default CallPilot access information for you. You can change these settings if required. Refer to the online Help for a detailed explanation.

1 In your e-mail Inbox, on the **Tools** menu, click **Services** (or **E-mail accounts** if you are using XP), and open **CallPilot Desktop Messaging configuration**. (Or, on the CallPilot Player, select **View > Options**.)

2 Click the **General** tab to display your current access settings.

3 Make any changes required, then click **OK**.

To change your CallPilot password

This is the same password that you use from the telephone.

1 Repeat steps 1 and 2 above, then click **Change Password**.

2 In the **Old password** field, type your current password.

3 In the **New password** field, type your new password.

4 In the **Retype new** field, type your new password again.

5 Click **OK** to save the change.

6 Click **OK** to exit the General settings.

Changing mail delivery settings

To view or change your mail settings

Your administrator enters the default mail settings for you. You can change them if required. Refer to the online Help for a detailed explanation.

1 In your e-mail Inbox, on the **Tools** menu, click **Services** (or **E-mail accounts** if you are using XP), and open **CallPilot Desktop Messaging configuration**.

2 Click the **Mail** tab to display the current mail settings.
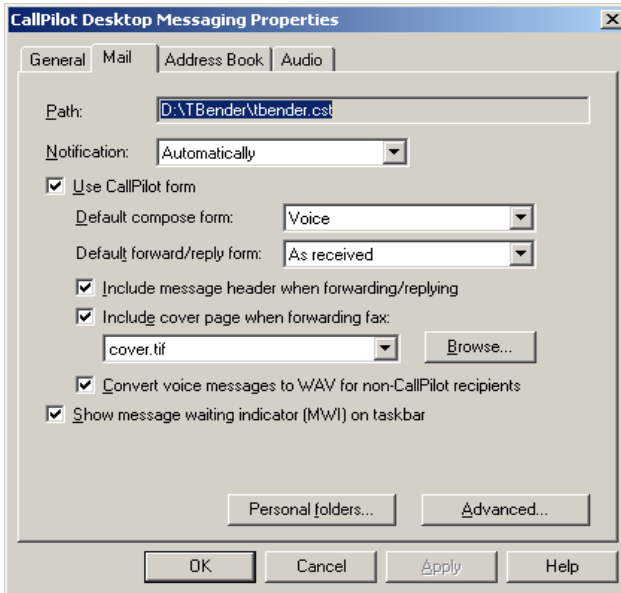
3 The default settings shown here are recommended for most users:

- Path - This is the location of the database file used to store CallPilot messages on your computer.

- Notification - You can set CallPilot to update your message list automatically, manually, or at intervals such as every 5 minutes. (Choose Manually to save costs on long distance or ISDN connections.)

- Use CallPilot form - Your CallPilot messages appear on a CallPilot form instead of an e-mail form.

- Include message header when forwarding/replying - The header information of the original message appears in a reply or forwarded message.

- Include cover page when forwarding a fax - Refer to the CallPilot Configuration section on page 23 for information on adding and/or modifying cover pages.

- Convert voice messages to WAV for non-CallPilot users - Your recorded messages are automatically converted from .vbk to .wav files when you send them to non-CallPilot users.
- Show message waiting indicator (MWI) on taskbar - The CallPilot telephone icon on the Windows taskbar turns red when you have a new message.

4 Make any changes required, then click **OK**.

Changing your address book settings

To view or change your Address Book settings

Your administrator enters the default Address Book settings for you. You can change them if required. Refer to the online Help for a detailed explanation.

1   In your e-mail Inbox, on the **Tools** menu, click **Services** (or **E-mail accounts** if you are using XP), and open **CallPilot Desktop Messaging configuration**.

2   Click the **Address Book** tab to display the current Address Book settings.

3   Make any changes required, then click **OK**.
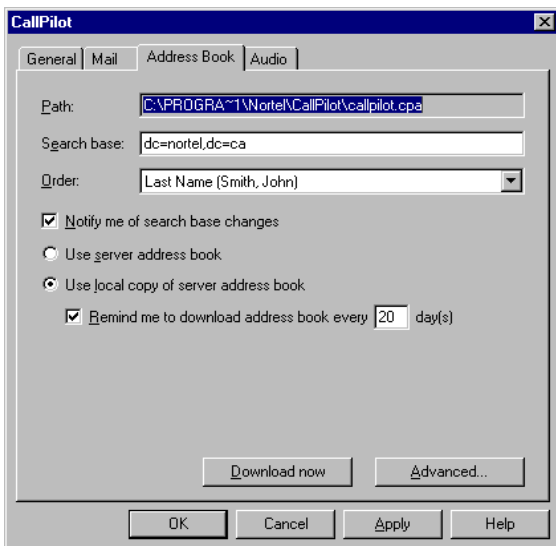
To download the Address Book to your computer

You can download the CallPilot address book from the server to your computer so that you can work offline.

1   Select the **Address Book** tab as described previously.

2   Click **Download now**. The server address book downloads to your computer.

3   Select **Use local address book**. From now on, when you click **To…** in a CallPilot message, whether working online or offline, you go to the address book that you downloaded to your computer.

4   Check **Remind me…** to remember to update this list by downloading it from the server occasionally. Set the number of days between reminders.

5   Click **OK**.

Whenever you want to address directly from the server again, reselect **Use server address book**.

Changing audio settings

To change the audio device and volume

You can play and record your messages from your telephone or your computer.

1 In your e-mail Inbox, on the **Tools** menu, click **Services** (or **E-mail accounts** if you are using XP), and open **CallPilot Desktop Messaging configuration**. (Or, on the CallPilot Player, select **View > Options**.)

2 Click the **Audio** tab to display the current Audio settings.
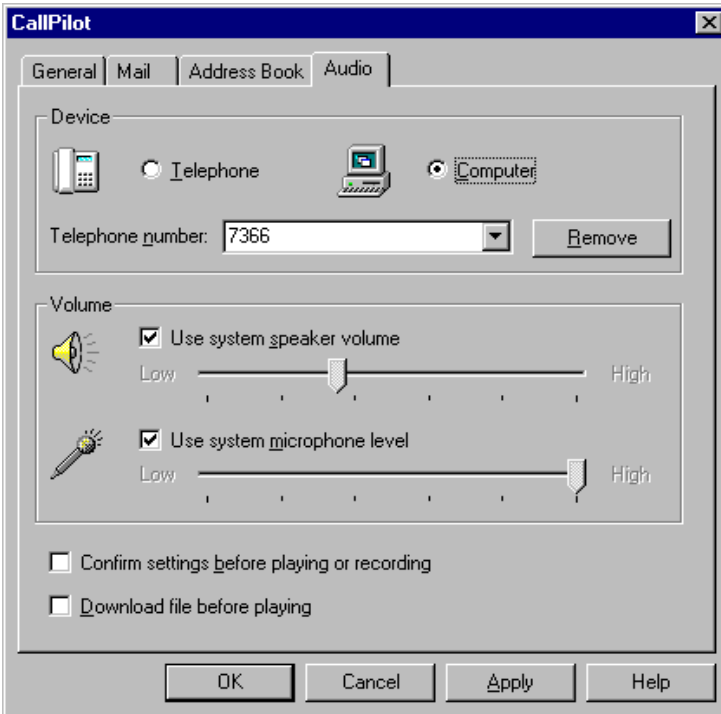
3 In **Device**, click **Telephone** if you want to play and record your voice messages from your telephone. Make sure the correct telephone number appears.
Or, click **Computer** if you want to play and record your voice messages through your computer's speakers and microphone.

Note: You can also change your audio device on the CallPilot Player.

4 In **Volume**, check the **Volume** and **Level** check boxes if you want to coordinate your CallPilot volume settings with your computer's speaker and microphone volumes.

5 If you want a reminder to check these settings before playing or recording voice messages, check **Confirm settings...** .

6 If you want to download voice messages to your computer before playing them, check **Download file...** . This option is useful if you are using a modem.

Linking to My CallPilot

Desktop Messaging provides links to the web-based resources in My CallPilot. To view or change the URL for My CallPilot, see *Changing your mailbox settings*, page 38. For more information on My CallPilot, refer to the *My CallPilot User Guide*.

1 In your e-mail Inbox, on the **Tools** menu, click **CallPilot Desktop Messaging Tools > My CallPilot**.

2 Select one of the tabs.

## To view or change your CallPilot feature settings

1 In My CallPilot, click the **CallPilot Features** tab.

2 Select any feature and make changes to your setup as required. Any changes you make to a feature go into effect immediately whether you use CallPilot from your computer or from your telephone.

To view user information

In My CallPilot, click the **Useful Information** tab to view online user information specific to your mailbox.
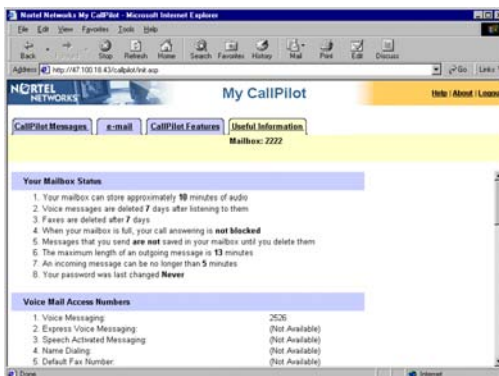
Working offline

To work offline, you need a computer that has CallPilot installed and configured in the same way as your office computer. You can download your messages and addresses to this computer before working offline.

1   (Optional) You may want to download your CallPilot messages to the computer that you will use offline. Log in to your e-mail and CallPilot, and on the **Tools** menu, click **CallPilot Desktop Messaging**, then click **Download all CallPilot Messages**. When your messages are downloaded, log out.
2   (Optional) You may want to download the server Address Book to your computer. See *Changing your address book settings*, page 41.
3   Open your e-mail while not connected to the network, and wait for the CallPilot Logon window to appear. You do not need to enter your password.
4   Click **Cancel**.

You can then work offline, reviewing your messages and recording and addressing new messages. You must use your computer's speakers and microphone to play and record messages offline; you cannot use a telephone for offline access.

CallPilot stores your recorded messages in your Outbox and sends them the next time you log in to the CallPilot server.

Message security in offline mode

If you share your computer with others, you should password-protect your messages in Outlook. Since Outlook automatically sends messages stored in the Outbox when you reconnect to the network, another user who has access to your Outlook profile can send messages in offline mode that will be transmitted without your knowledge. To protect your mailbox, assign a password to your Outlook .cst file. For details, refer to the Desktop Messaging online Help.

CallPilot Desktop Messaging User Guide
for Microsoft Outlook

This user guide is distributed in soft copy only.

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