



**NORTEL**  
**NETWORKS**

*How the world shares ideas.*

# CallPilot.™

Product release 1.07

Desktop Messaging  
Quick Reference Guide



## **About deleting Desktop Messaging messages**

### **Microsoft Outlook and Microsoft Exchange**

Message deletion is handled differently in this version of Desktop Messaging.

When you delete a message in Microsoft Outlook or Microsoft Exchange, the message moves to the Deleted Items folder. Outlook permanently deletes these messages from your CallPilot mailbox when you exit Outlook. The messages are deleted immediately when you exit.

In earlier versions of Desktop Messaging, deleted messages were not permanently erased until you removed them from your Deleted Items folder.

### **Lotus Notes**

When you delete a message in Lotus Notes, the message moves to the Trash folder. To permanently delete these messages, select **Actions** and click **Empty Trash**.

To delete a message while it is open, click the **Empty Trash** icon on the toolbar of the open message to delete the entire message. The message is permanently deleted, and does not move to the Trash folder.

### **Novell GroupWise**

If you use Novell GroupWise and you delete a CallPilot message, the message is deleted immediately. It is not moved to a deleted items folder.

### **Internet Mail clients**

By default, Internet Mail clients (Netscape Messenger, Microsoft Outlook Express, Microsoft Outlook 98, and Eudora Pro) move deleted CallPilot messages to a Deleted Items or Trash folder where you can recover the messages or permanently delete them.

Messages stored in this folder remain in your CallPilot mailbox on the CallPilot server until they are permanently deleted. To permanently delete the messages, empty this folder. For more information, refer your email client's online Help.

## **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
- select the message in the Outlook Inbox and forward it from the Outlook toolbar.

### **Business Communications Manager product and documentation updates**

For the latest information about Business Communications Manager product and documentation updates, go to the Nortel Networks ITAS web site at <http://www.nortelnetworks.com/norstar-itas>.

**CallPilot**

# **Desktop Messaging**

## **Quick Reference Guide**

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Product release 1.07

Standard 1.0

April 2000



***Welcome to***

# **CallPilot Desktop Messaging**

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*CallPilot Desktop Messaging from Nortel Networks allows you to access your CallPilot mailbox from your personal computer. You can manage all your voice, fax, and e-mail messages in one graphical interface. You can still access your mailbox from your telephone at any time.*

*In CallPilot Desktop Messaging, you can send and receive messages that include any combination of voice, fax, and text. Here are some of the many ways you can use CallPilot Desktop Messaging:*

- ◆ *Listen to voice messages.*
- ◆ *View and print fax messages.*
- ◆ *Record and send voice messages.*
- ◆ *Create and send fax messages.*
- ◆ *Forward and reply to voice and fax messages.*
- ◆ *Add message options such as urgent and private.*
- ◆ *Add voice, fax, or text file attachments to messages.*
- ◆ *Create personal distribution lists for Desktop Messaging.*
- ◆ *Change your CallPilot password.*

*Refer to the online Help available with CallPilot Desktop Messaging for detailed information not covered in this guide.*

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## Internet Mail Clients

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## Web Messaging

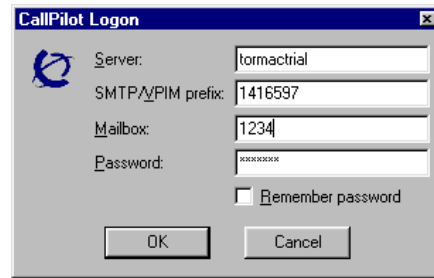
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# Logging in

Use your CallPilot password to log in to Desktop Messaging.

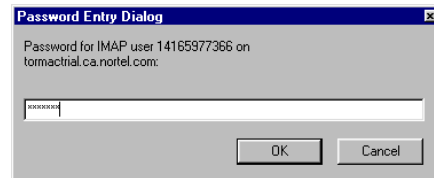
## To log in from Microsoft Exchange, Microsoft Outlook, Lotus Notes, or Novell GroupWise

- 1 Open Microsoft Exchange, Microsoft Outlook, Lotus Notes, or Novell GroupWise.
- 2 In the CallPilot Logon window, type your CallPilot password in the Password box.
- 3 Click OK.



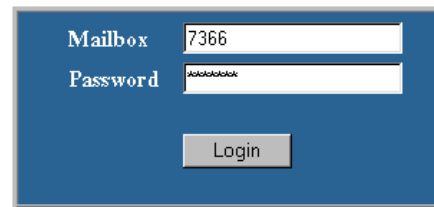
## To log in from your Internet mail application

- 1 Open your Internet mail application. The Password window will be similar to the one shown on the right.
- 2 In the Password box, type your CallPilot password.
- 3 Click OK.



## To log in to CallPilot Web Messaging

- 1 In your web browser, navigate to the CallPilot Web Messaging address.
- 2 In the Mailbox box, type your mailbox number. This is usually your office telephone extension number.
- 3 In the Password box, type your CallPilot password.
- 4 Click Login.



## Remote login

You can log in to your CallPilot mailbox from any computer that has Desktop Messaging 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. You may need to speak first so that a voice message will play, if it doesn't play immediately.

# Changing your CallPilot password

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You can change your CallPilot password from Desktop Messaging or from the telephone.

## To access CallPilot Password Change from Microsoft Exchange or Microsoft Outlook

- 1 In your Inbox, on the Tools menu, click Services.
- 2 Click the Services tab and select CallPilot Desktop Messaging, click Properties, then click the General tab.
- 3 Click Change Password.

## To access CallPilot Password Change from Lotus Notes

- 1 In your Inbox, on the Actions menu, click CallPilot Configuration, then click the General tab.
- 2 Click Change Password.

## To access CallPilot Password Change from Novell GroupWise

- 1 In your inbox, on the Tools menu, click CallPilot Desktop Messaging, select CallPilot Desktop Messaging Options, then click the General tab.
- 2 Click Change Password.

## To access CallPilot Password Change from Internet mail applications

You must have the CallPilot Player installed on your computer.

- 1 From the Windows Start menu, select Programs, select Nortel Networks CallPilot Desktop Messaging, then click CallPilot Player.
- 2 In the Tools menu, click Options, then select the IMAP Server Configuration tab.
- 3 Click Change Password.

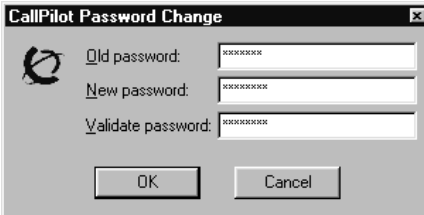
## To access CallPilot Password Change from Web Messaging

You must have the CallPilot Player installed on your computer.

- 1 From the Windows Start menu, select Programs, select Nortel Networks CallPilot Desktop Messaging, then click CallPilot Player.
- 2 In the Tools menu, click Options, then select the IMAP Server Configuration tab.
- 3 Click Change Password.

## To change your password

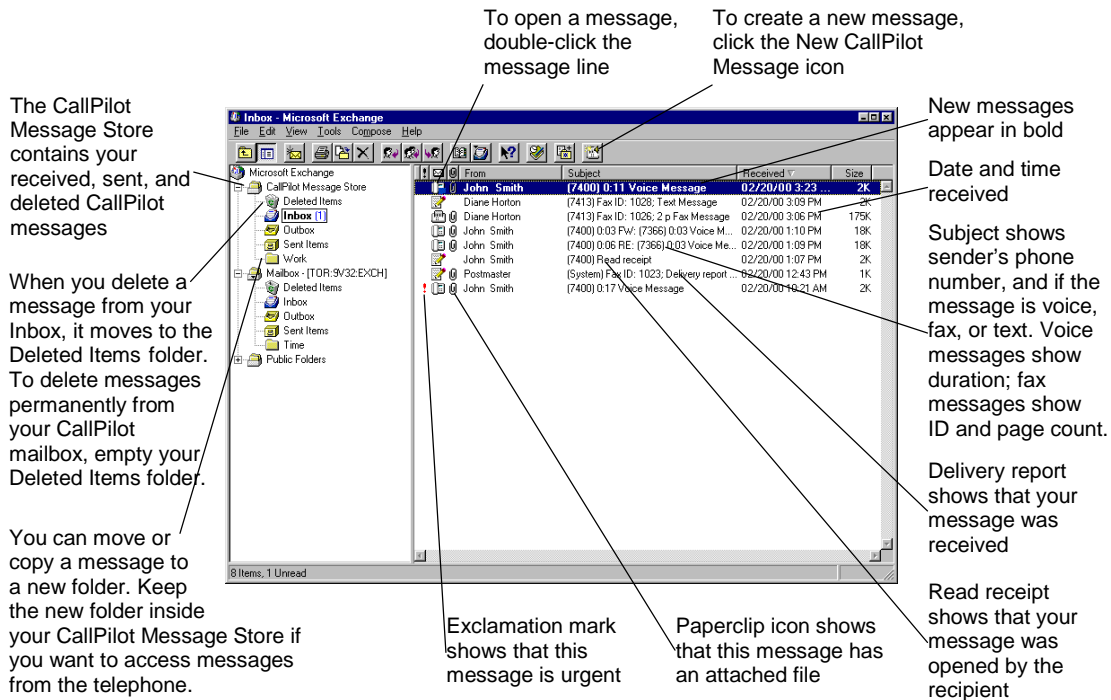
- 1 In the Old password box, type your current password.
- 2 In the New password box, type your new password.
- 3 In the Validate password box, type your new password again.
- 4 Click OK.

A screenshot of the 'CallPilot Password Change' dialog box. It features a Nortel logo on the left. There are three text input fields: 'Old password:', 'New password:', and 'Validate password:'. Each field contains a series of asterisks to mask the text. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

# CallPilot Desktop Messaging for Microsoft Exchange/Outlook

When you open Microsoft Exchange or Microsoft Outlook, your CallPilot messages appear in the Inbox under CallPilot Message Store. From the Inbox, you can open, move, copy, delete, forward, and reply to messages, and compose new messages.

The CallPilot indicator in the Windows system tray turns red when you have a new message.



## To work offline

To work offline, you need a computer that has Desktop Messaging installed and configured in the same way as your office computer. Log in to Microsoft Exchange or Microsoft Outlook and, on the Tools menu, click CallPilot Desktop Messaging, then click Download all CallPilot Messages. You can then work offline, reviewing your messages and recording new messages from your computer. CallPilot stores your new messages in your Outbox and sends them the next time you log in to the CallPilot server.

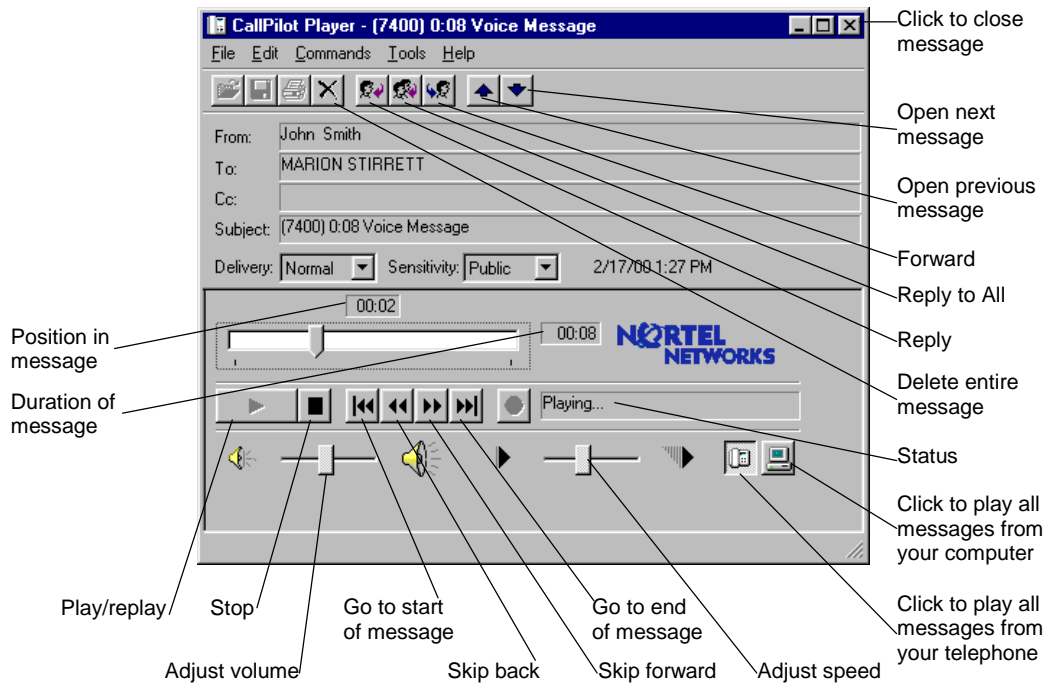


## Reviewing your messages

### To play a voice message

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

You can choose to play your voice messages from your telephone or your computer by clicking the Telephone or Computer icon in the CallPilot Player. You can change this selection at any time. If you select Telephone, the phone rings when you open a message, and the message plays when you answer. If you select Computer, your messages play through your computer's speakers or your headphones.



### To change your default audio device and telephone number

You can change your default audio device on the CallPilot Player by clicking the Telephone or Computer icon. Or, in your Exchange or Outlook Inbox, on the Tools menu, click Options, click Services, select Profile, click Properties, click the Audio tab, and select Telephone or Computer.

To change the default telephone number that CallPilot dials to play your voice messages, make sure that Telephone is selected as your audio device on the Audio tab, then change the telephone number.

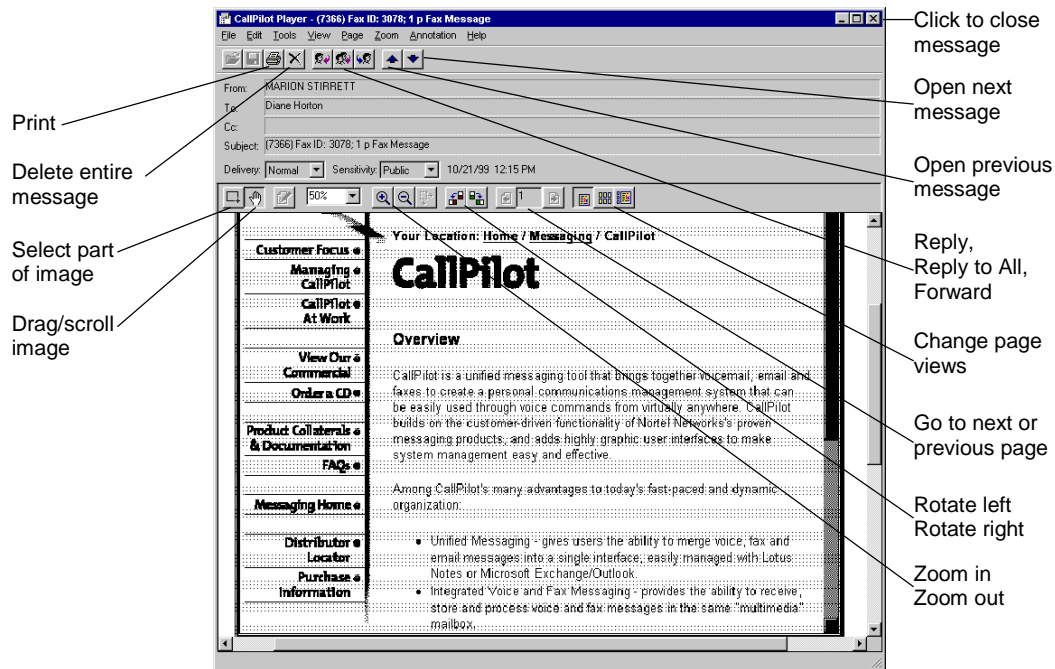
## Reviewing your messages (continued)

### To view a fax message

To view faxes in Desktop Messaging, you must have Imaging for Windows installed on your PC. In addition, your CallPilot administrator must enable fax capability for your mailbox.

To open a fax message, double-click the message line. 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.

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




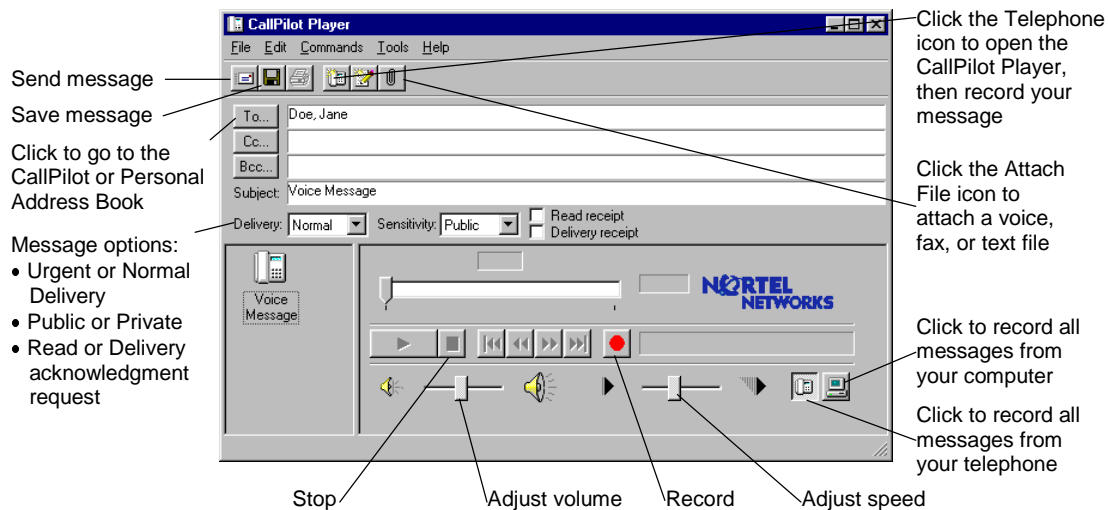
## Composing messages

You can compose a message that is any combination of voice, fax, or text. A composed message can be a new message, a reply to a received message, or an introduction to a forwarded message. Before you send a message, you can add attachments and options.

### To record and send a voice message

You create a voice message by opening a new CallPilot message and recording a message from your computer or your telephone. You can send the message or save it to send later.

- 1 On the Microsoft Exchange or Outlook toolbar, click the New CallPilot Message icon .
- 2 In the new message window, click the Telephone icon in the toolbar to open the CallPilot Player.
- 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.  
If you are recording from the telephone, answer when it rings. At the tone, record your message. Click Stop to end the recording, then hang up.
- 5 Click To... to open the CallPilot or Personal Address Book, or type the formatted address in the To field. For addressing information, see page 7.
- 6 Add attachments and options if required. See pages 6 and 8.
- 7 On the toolbar, click the Send Message icon.



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

You can record a voice message and save it as a file to use later.

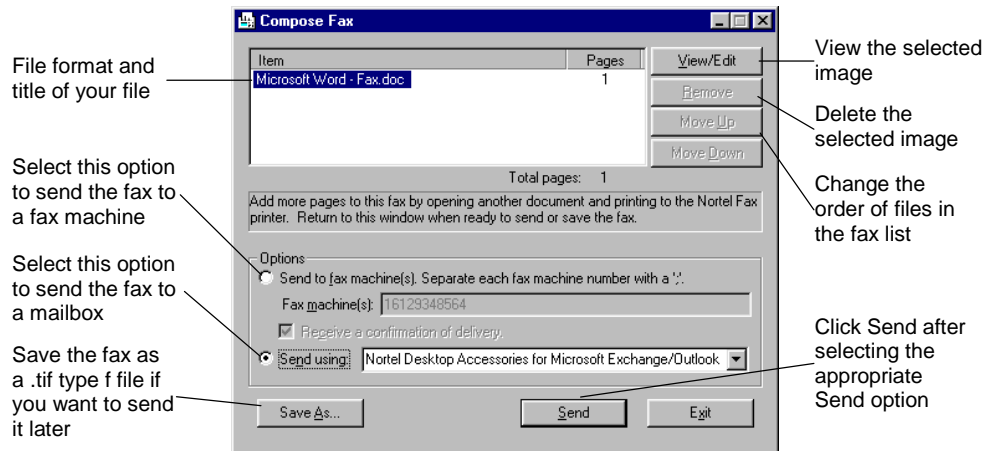
- 1 In a new CallPilot message, record a message, and on the File menu, click Save as... .
- 2 In the File name box, type a name for the file, select a folder to keep the file in, then click Save. Save voice files as .vbk files if your recipients are all CallPilot users, or save them as .wav files if some recipients are non-CallPilot users.

## Composing messages (continued)

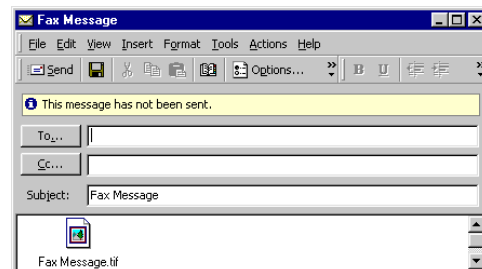
### To create and send a fax message

To send a fax, your CallPilot mailbox must have fax capability. The 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. Internet Explorer must be your default browser.

- 1 Open the document that you want to fax. It must be 8.5 inches (21.5 cm) wide or less.
- 2 On the File menu, click Print.
- 3 From the list of printers, select Nortel Fax, then click Print or OK.
- 4 The Compose Fax dialog box displays. Before sending the fax, you can add more documents, including a cover page, by repeating steps 1 to 3. You can also view the fax, and save it as a file.
- 5 Select a Send option. To send your fax to a fax machine, enter the number(s), then click Send. To send your fax to a CallPilot or e-mail recipient, select Send using... , then click Send.



- 6 If you selected Send using..., you can add a voice introduction to the fax. In the Voice Annotation dialog box, click Yes, then record the voice file. Or click No to send a simple fax.
- 7 A new message window opens with your fax file attached. Click To... to open the CallPilot or Personal Address Book, or type the formatted address in the To field. For addressing information, see page 7.
- 8 Add attachments and options if required. See pages 6 and 8.
- 9 Click Send.



### To create and send a text message

To create a text message, open a new CallPilot message and type or paste plain text into it, then click the Send Message icon. To save a text message as a file, click Save As from the File menu, and save it as a .txt file.

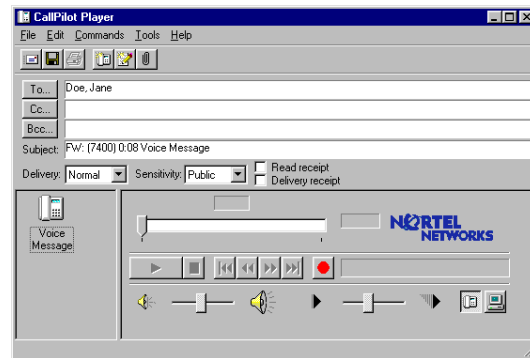
## Forwarding and replying to messages

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

### To forward or reply to a message

- 1 In an open message, click the Forward, Reply, or Reply to all icon.
- 2 Follow the steps for composing a message. See page 4.
- 3 Address a forwarded message the same way as a new message. Replies are addressed automatically.

You can change the subject line before sending the message.

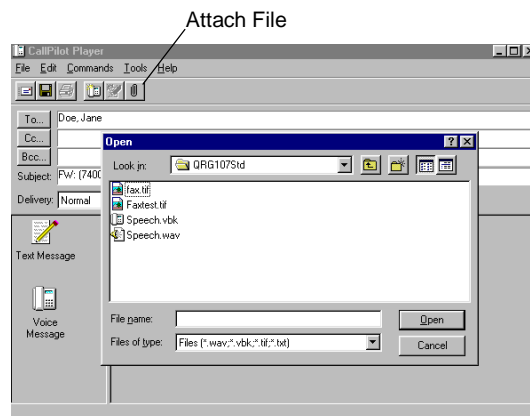


## Adding attachments to messages

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, but must be .wav format for non-CallPilot recipients. Fax files must be .tif type f format. Text files must be .txt format.

### To attach a file to a message

- 1 In a new CallPilot message, click the Attach File icon.
- 2 In the Open File 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.



# Addressing messages

## To download the CallPilot Address Book

The CallPilot Address Book contains the names and addresses of all users on your local CallPilot server. You cannot edit this list. To use the CallPilot Address Book, download it to your computer.

- 1 In your Inbox, on the Tools menu, select Services..., then select CallPilot Desktop Messaging on the Services tab.
- 2 Click Properties, then click the Address Book tab.
- 3 Click Download now. To refresh the list on a regular basis, check the Remind me... box and enter the number of days between reminders.
- 4 Click OK to return to your Inbox.

## To add CallPilot addresses to your Personal Address Book

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

To add an address to your Personal Address Book, double-click a name in the CallPilot Address Book. In Properties, click Add to Personal Address Book.

Or, you can create an address manually and add it to your Personal Address Book.

- 1 On the Tools menu, select Address Book.
- 2 On the File menu, click New Entry. Select CallPilot Address, select Put this entry in the Personal Address Book, then click OK.
- 3 In CallPilot - General, select the appropriate address type from the drop-down list.
- 4 Enter the required address details. Refer to the online Help for the correct addressing formats.
- 5 Click OK.

The screenshot shows the 'New CallPilot Address Properties' dialog box with the 'General' tab selected. The 'Display name' field contains 'John Smith'. The 'Local CallPilot server' field contains 'tormactrial.ca.nortel.com'. The 'CallPilot address type' dropdown menu is set to 'Network mailbox'. Below this, there is a section for 'Address information' with a 'Network mailbox' field. A text box below the field provides instructions: 'Enter the network mailbox number. A network mailbox number is the number you normally use to address a message to the recipient using the telephone voice messaging service. A network mailbox resides on a remote server, which has been defined on the local CallPilot server. If the remote server is not defined, create an Open AMIS or Open VPIM entry.' At the bottom of the dialog are buttons for 'Send Options...', 'OK', 'Cancel', 'Apply', and 'Help'.

## To address a message from your CallPilot or Personal Address Book

- 1 In a new CallPilot message, click To... .
- 2 In the Show names list, select CallPilot Address Book or Personal Address Book.
- 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.

## 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 online Help for the correct addressing formats.

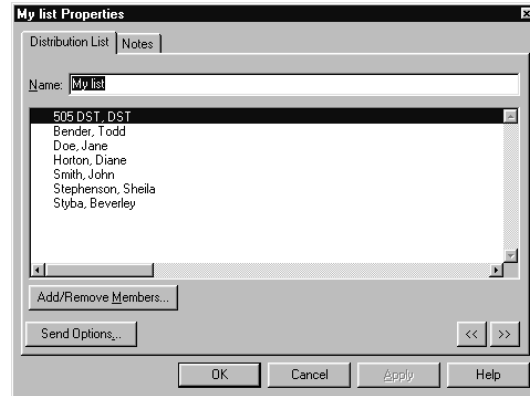
## Creating personal distribution lists

You can create a Desktop Messaging personal distribution list for a group of recipients to whom you frequently send messages. After you create a list, it appears in your Personal Address Book. You simply select the list when you address a message. You cannot access these lists from your telephone.

You create a CallPilot personal distribution list in the same way that you create a Microsoft Exchange or Outlook personal distribution list.

### To create a personal distribution list

- 1 In your Inbox, on the Tools menu, click Address Book.
- 2 Select Personal Address Book, and on 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 to end the list.
- 8 Click OK to save the list.



## Setting message options

In a new CallPilot message, you can set priority, sensitivity, and acknowledgment options.

### To set Delivery priority for a message

Select Urgent, or leave the setting as Normal.

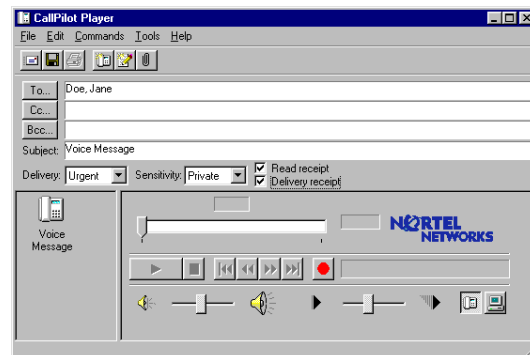
### To set Sensitivity for a message

Select Private, or leave the setting as Public.

Be aware that messages you send marked Private can be forwarded by the recipient. Also, recipients in non-CallPilot systems may not be informed of Private settings. In your message, tell the recipient that the message is Private.

### To request a Read or Delivery receipt

Check Read receipt to request acknowledgment that your recipient opened the message. Check Delivery receipt to request acknowledgment that your recipient received the message.

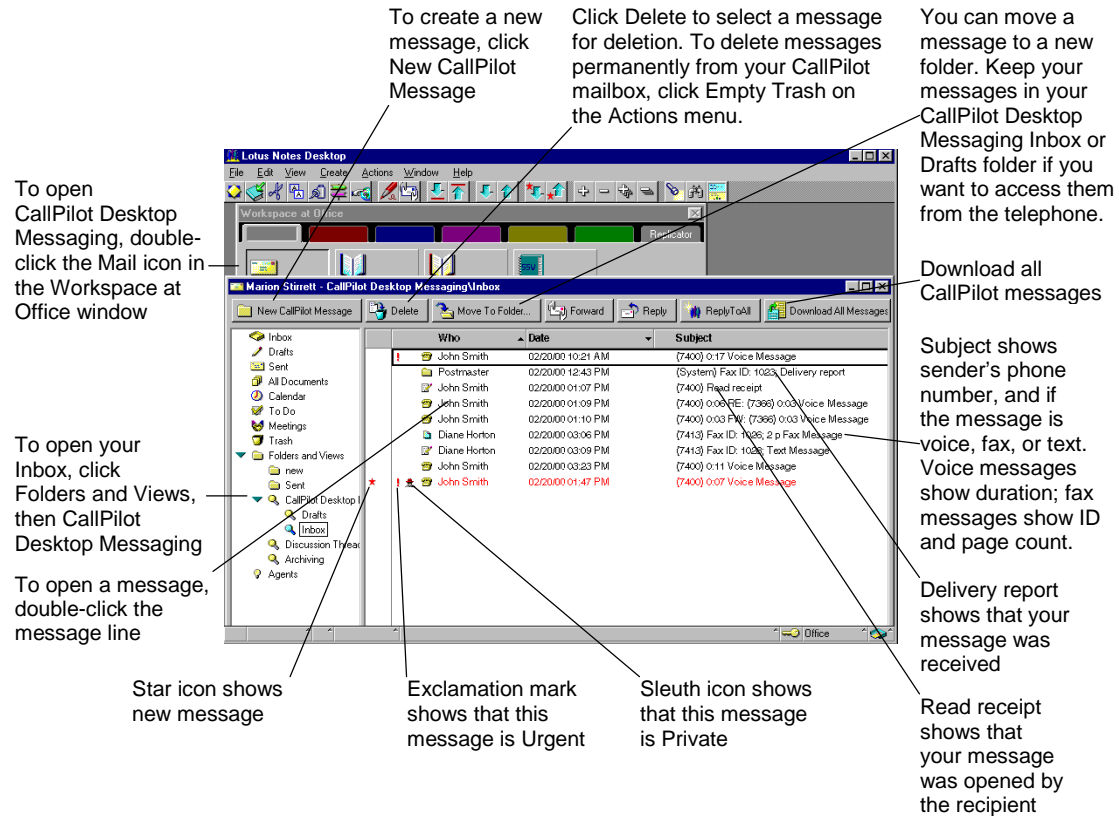


# CallPilot Desktop Messaging for Lotus Notes

When you open Lotus Notes and log in to CallPilot Desktop Messaging, you are in the Workspace at Office window.

To open your CallPilot Inbox, click the Mail icon, click Folders and Views, then click CallPilot Desktop Messaging. Your Inbox contains your received, sent, draft, and deleted CallPilot messages. From the Inbox, you can open, move, copy, delete, forward, and reply to messages, and compose new messages.

The CallPilot indicator in the Windows system tray turns red when you have a new message.



## To work offline

See the instructions in the online Help for configuring Desktop Messaging so that you can work offline. To retrieve your messages before working offline, log in to Lotus Notes, open your Inbox, and on the Actions menu, click Download All Messages. When you want to work offline, log off and restart Lotus Notes in Island mode. You can then review your messages and record new messages from your computer. Lotus Notes stores the messages you send in Island mode and sends them the next time you connect to the CallPilot server. You can log in to CallPilot from Island mode.

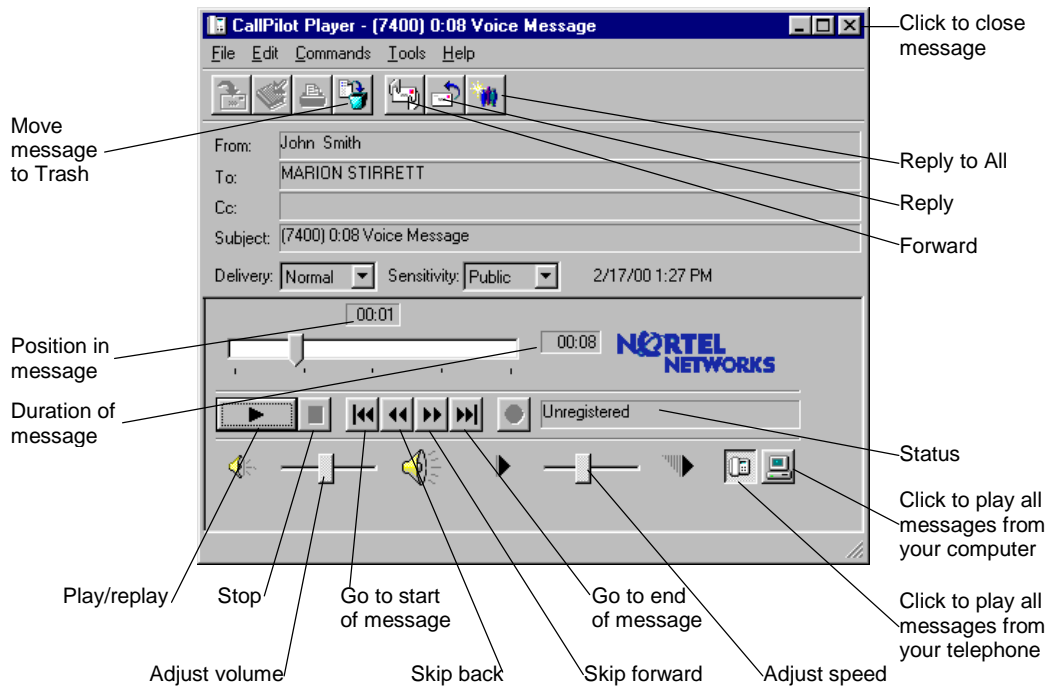


## Reviewing your messages

### To play a voice message

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

You can choose to play your voice messages from your computer or your telephone by clicking the Telephone or Computer icon in the CallPilot Player. You can change this selection at any time. If you select Telephone, the phone rings when you open a message, and the message plays when you answer. If you select Computer, your messages play through your computer's speakers or your headphones.



### To change your default audio device and telephone number

You can change your default audio device on the CallPilot Player by clicking the Telephone or Computer icon. Or, in Lotus Notes, on the Actions menu, click CallPilot Configuration, click the Audio tab, and select Telephone or Computer.

To change the default telephone number that CallPilot dials to play your voice messages, make sure that Telephone is selected as your audio device on the Audio tab, then change the telephone number.

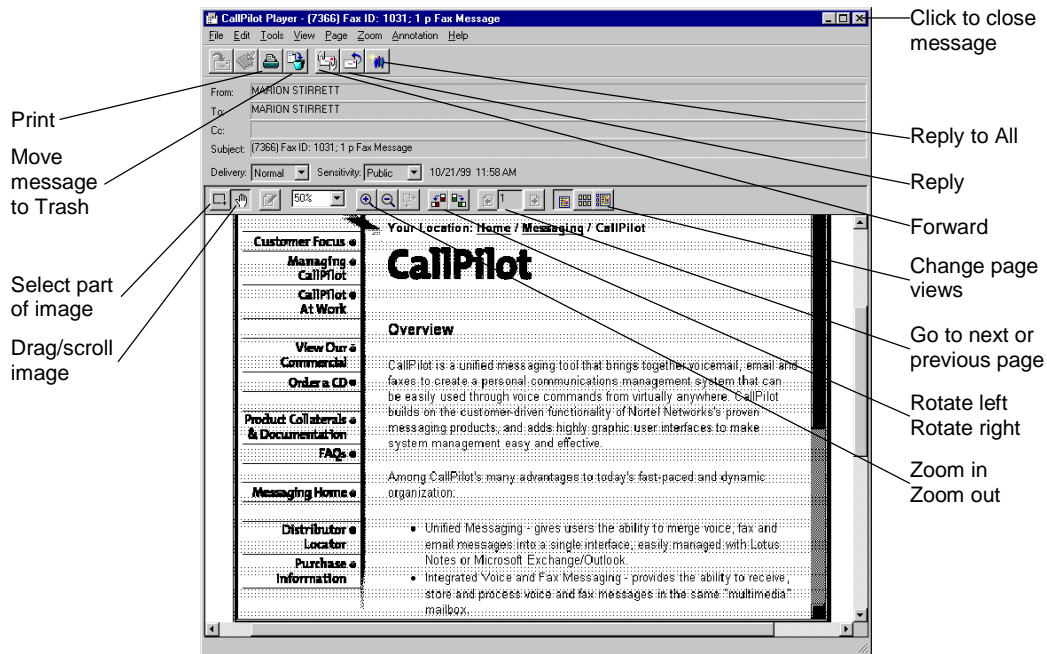
## Reviewing your messages (continued)

### To view a fax message

To view faxes in Desktop Messaging, you must have Imaging for Windows installed on your PC. In addition, your CallPilot administrator must enable fax capability for your mailbox.

To open a fax message, double-click the message line. 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.

While viewing the fax, you can enlarge or reduce the image, rotate it, move it, save it, forward and reply to it, and print it.



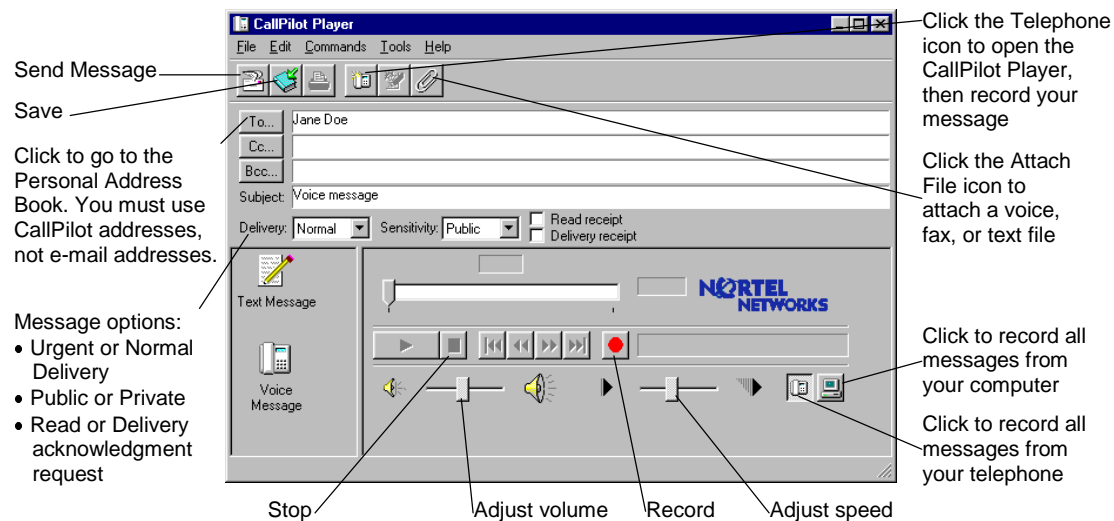
## Composing messages

You can compose a message that is any combination of voice, fax, or text. A composed message can be a new message, a reply to a received message, or an introduction to a forwarded message. Before you send a message, you can add attachments and options.

### To record and send a voice message

You create a voice message by opening a new CallPilot message and recording a message from your computer or your telephone. You can send the message or save it to send later.

- 1 In the CallPilot Desktop Messaging Inbox, click the New CallPilot Message button.
- 2 In the new message window, click the Telephone icon in the toolbar to open the CallPilot Player.
- 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.  
If you are recording from the telephone, answer when it rings. At the tone, record your message. Click Stop to end the recording, then hang up.
- 5 Click To... to open your personal Address Book, or type the formatted address in the To field. For addressing information, see page 7.
- 6 Add attachments and options if required. See pages 6 and 8.
- 7 On the toolbar, click the Send Message icon.



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

You can record a voice message and save it as a file to use later.

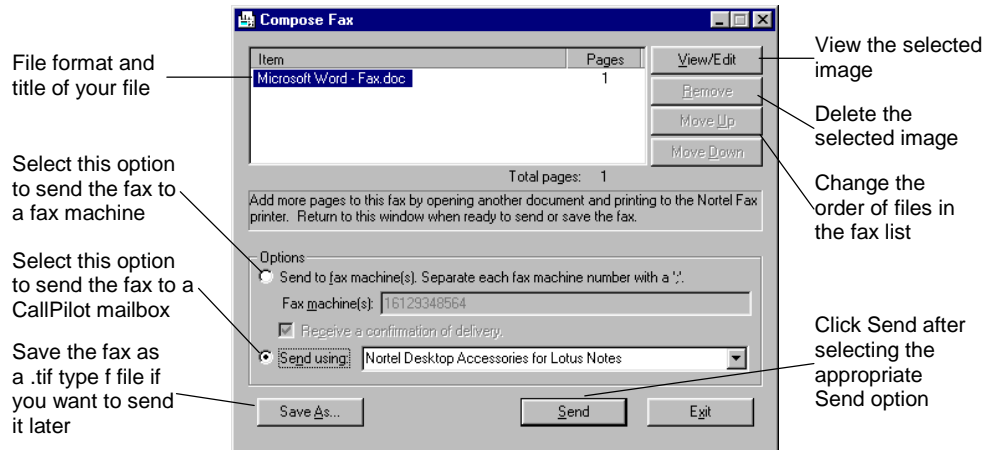
- 1 In a new CallPilot message, record a message and, on the File menu, click Save as... .
- 2 In the File name box, type a name for the file, select a folder to keep the file in, then click Save. Save voice files as .vbk files if your recipients are all CallPilot users, or save them as .wav files if some recipients are non-CallPilot users.

## Composing messages (continued)

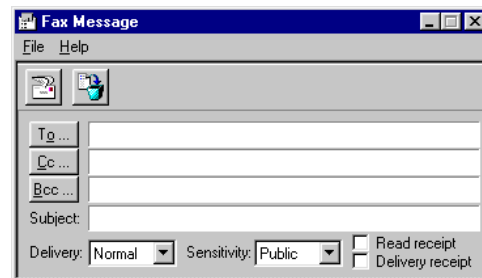
### To create and send a fax message

To send a fax, your CallPilot mailbox must have fax capability enabled. The 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 send your fax to a fax machine.

- 1 Open the document that you want to fax. It must be 8.5 inches (21.5 cm) wide or less.
- 2 On the File menu, click Print.
- 3 From the list of printers, select Nortel Fax, then click Print or OK.
- 4 The Compose Fax dialog box displays. Before sending the fax, you can add more documents, including a cover page, by repeating steps 1 to 3. You can also view the fax, and save it as a file.
- 5 Select a Send option. To send your fax to a fax machine, enter the number(s), then click Send. To send your fax to a CallPilot mailbox, select Send using... , then click Send.



- 6 If you selected Send using..., a new message window opens. Click To... to open your personal Address Book, or type the formatted address in the To field. For addressing information, see page 7.
- 7 Add message options if required. See page 8.
- 8 Click the Send Message icon.



### To create and send a text message

To create a text message, open a new CallPilot message and type or paste plain text into it, then click the Send Message icon. To save a text message as a file, click Save As from the File menu, and save it as a .txt file.

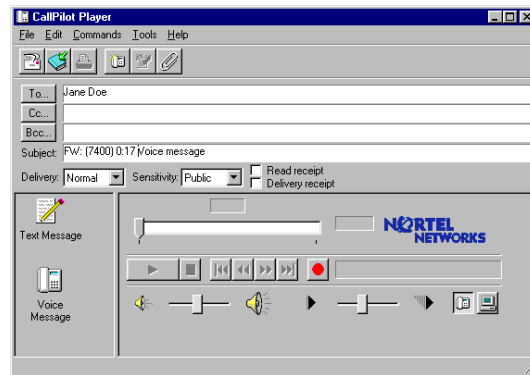
## Forwarding and replying to messages

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

### To forward or reply to a message

- 1 In an open message, click the Forward, Reply, or Reply to all icon.
- 2 Follow the steps for composing a message. See page 4.
- 3 Address a forwarded message the same way as a new message. Replies are addressed automatically.

You can change the subject line before sending the message.

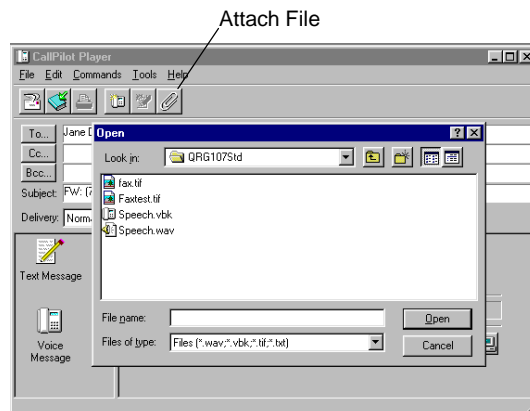


## Adding attachments to messages

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, but must be .wav format for non-CallPilot recipients. Fax files must be .tif type f format. Text files must be .txt format.

### To attach a file to a message

- 1 In a new CallPilot message, click the Attach File icon.
- 2 In the Open File 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.



# Addressing messages

## To download CallPilot addresses to your personal Address Book

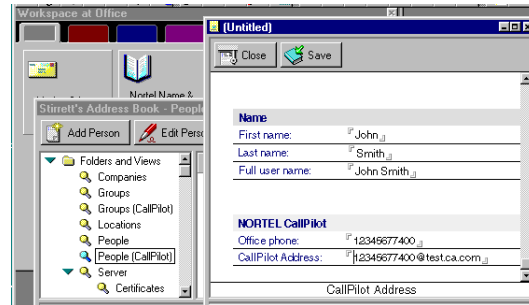
You can download the names and addresses of any CallPilot users on your Lotus Notes server to your personal Address Book. After you download this list, you can add to it or edit it.

- 1 For automatic download, in your Inbox, on the Actions menu, click CallPilot Configuration, then click the Address Book tab.
  - 2 Check Download address book at logon, then click OK.
- Or
- 1 For manual download, in your Inbox, on the Actions menu, click CallPilot Configuration, then click the Address Book tab. Make sure the Download Address Book at logon box is not checked.
  - 2 Double-click the Address Book icon in the Workspace at Office window.
  - 3 In your personal Address Book, in the left pane, click People (CallPilot).
  - 4 On the Actions menu, click Download CallPilot Address Book.

## To add names to your personal Address Book

You can create a CallPilot address manually and add it to your personal Address Book.

- 1 Double-click the Address Book icon in the Workspace at Office window.
- 2 Select People (CallPilot), then click the Add Person button.
- 3 Enter at least a Last Name and First Name.
- 4 Click the arrow beside CallPilot Address to open the CallPilot Address Assistant. Select the appropriate address type.
- 5 In the address dialog box, enter the required details. Refer to the online Help for the correct addressing formats.
- 6 Click Add Address to Personal Address Book, then click OK.
- 7 In Person (CallPilot), click the Save button, then click the Close button.



## To address a message from the address book

- 1 In a new CallPilot message, click To... and select either the CallPilot address list on your Lotus Notes server, or, in your personal Address Book, select People or Groups (CallPilot).
- 2 In the Name list, select the name of the recipient.  
To select a group, check the View by groups box, then select a group name.
- 3 Click To ->. You can select one or more addresses, clicking To -> after each one.
- 4 Click OK to return to the new CallPilot message.

## To address a message manually

You can type an address directly into the To field of a new message. Enclose the address in quotation marks. Refer to the online Help for the correct addressing formats.

## Creating CallPilot group lists

You can create a distribution list for a group of recipients to whom you frequently send messages. After you create a list, it appears in your personal Address Book in Groups (CallPilot).

You create a CallPilot group in the same way that you create a Lotus Notes group. The difference is that the CallPilot group must contain only CallPilot addresses, not e-mail addresses.

### To create a CallPilot group

- 1 Double-click the Address Book icon in the Workspace at Office window.
- 2 Select Groups (CallPilot), then click the Add Group button.
- 3 Enter a Group Name and Description, then click the arrow beside Members.
- 4 In your personal Address Book, place a check mark beside each name that you want to add to the group. Click OK to exit the list.
- 5 Click the Save button, then the Close button.

You can edit or delete the list in Groups (CallPilot).



## Setting message options

In a new CallPilot message, you can set priority, sensitivity, and acknowledgment options.

### To set Delivery priority for a message

Select Urgent, or leave the setting as Normal.

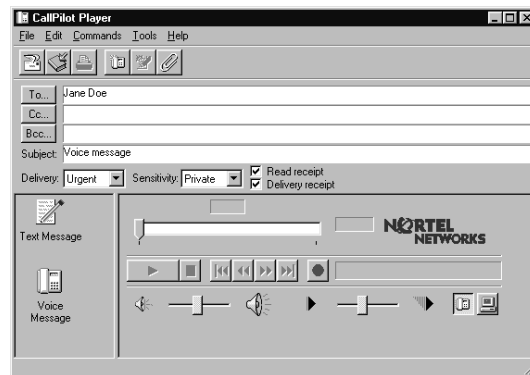
### To set Sensitivity for a message

Select Private, or leave the setting as Public.

Be aware that messages you send marked Private can be forwarded by the recipient. Also, recipients in non-CallPilot systems may not be informed of Private settings. In your message, tell the recipient that the message is Private.

### To request a Read or Delivery receipt

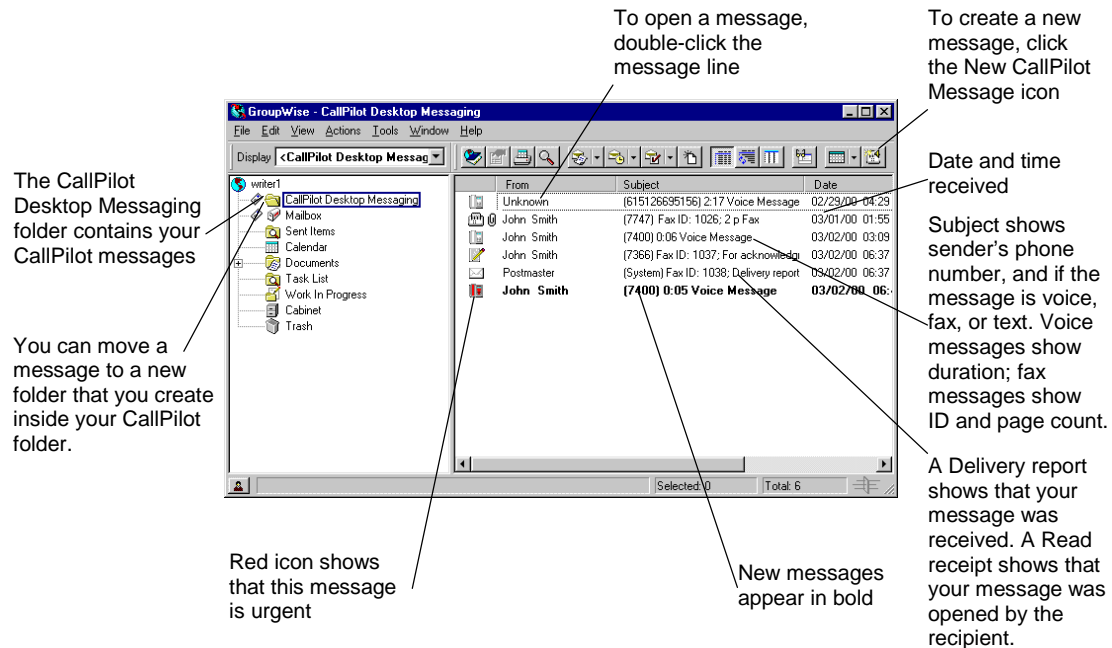
Check Read receipt to request acknowledgment that your recipient opened the message. Check Delivery receipt to request acknowledgment that your recipient received the message.



# CallPilot Desktop Messaging for Novell GroupWise

When you open Novell GroupWise, your CallPilot messages appear in the CallPilot Desktop Messaging folder. You can open, move, copy, delete, forward, and reply to messages, and compose new messages.

The CallPilot indicator in the Windows system tray turns red when you have a new message.



## To work offline

To work offline, you need a computer that has Desktop Messaging installed and configured in the same way as your office computer. Log in to Novell GroupWise and, on the Tools menu, click CallPilot Desktop Messaging, then click Download all CallPilot Messages. You can then work offline, reviewing your messages and recording new messages from your computer. CallPilot stores your new messages and sends them the next time you log in to the CallPilot server.

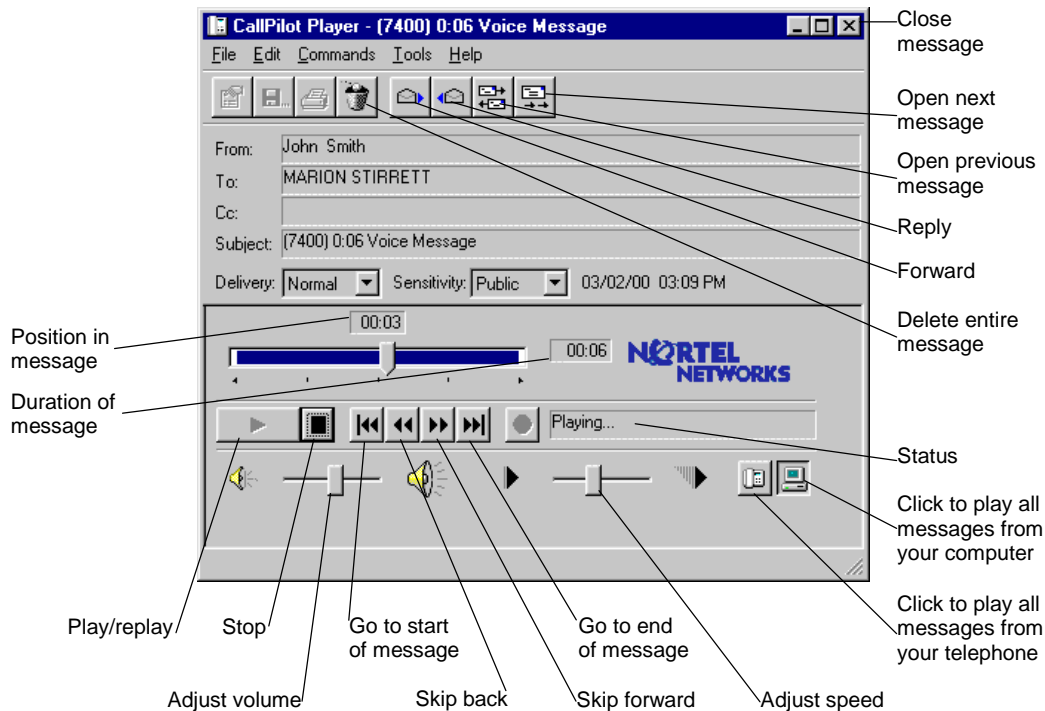


## Reviewing your messages

### To play a voice message

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

You can choose to play your voice messages from your telephone or your computer by clicking the Telephone or Computer icon in the CallPilot Player. You can change this selection at any time. If you select Telephone, the phone rings when you open a message, and the message plays when you answer. If you select Computer, your messages play through your computer's speakers or your headphones.



### To change your default audio device and telephone number

You can change your default audio device on the CallPilot Player by clicking the Telephone or Computer icon. Or, in your Inbox, on the Tools menu, click CallPilot Desktop Messaging, click CallPilot Desktop Messaging Options, click the Audio tab, and select Telephone or Computer.

To change the default telephone number that CallPilot dials to play your voice messages, make sure that Telephone is selected as your audio device on the Audio tab, then change the telephone number.

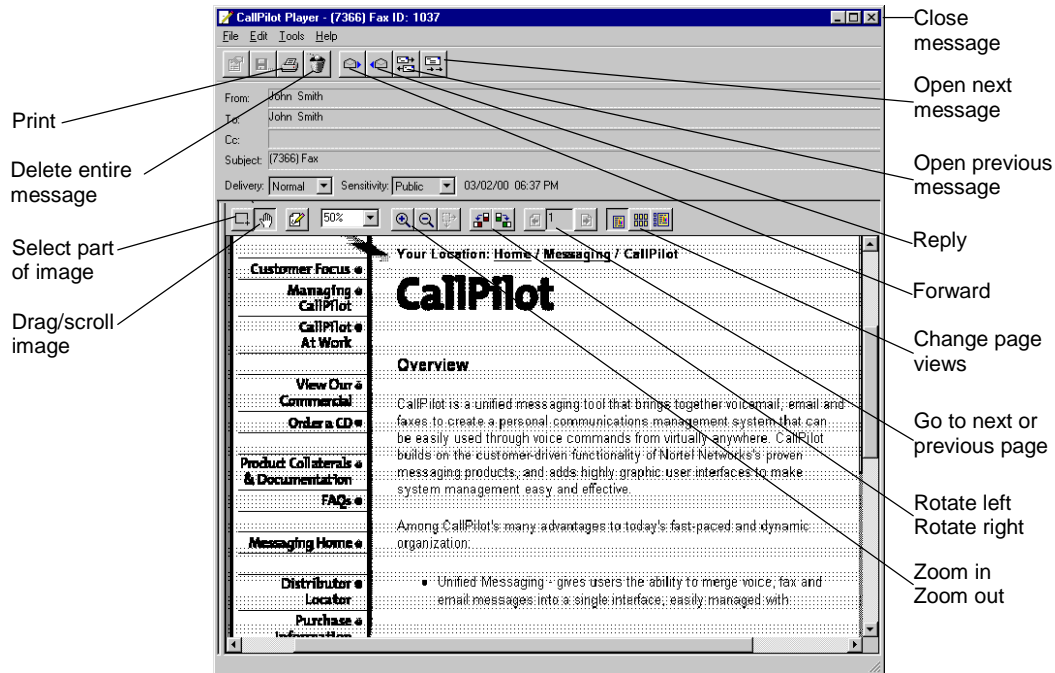
## Reviewing your messages (continued)

### To view a fax message

To view faxes in Desktop Messaging, you must have Imaging for Windows installed on your PC. In addition, your CallPilot administrator must enable fax capability for your mailbox.

To open a fax message, double-click the message line. 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.

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



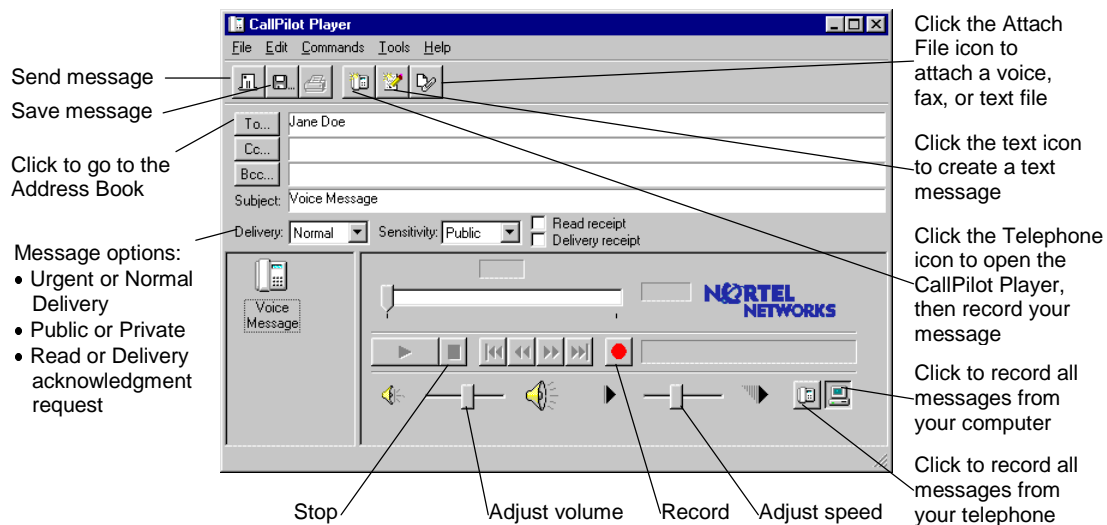
## Composing messages

You can compose a message that is any combination of voice, fax, or text. A composed message can be a new message, a reply to a received message, or an introduction to a forwarded message. Before you send a message, you can add attachments and options.

### To record and send a voice message

You create a voice message by opening a new CallPilot message and recording a message from your computer or your telephone. You can send the message or save it to send later.

- 1 In the Novell GroupWise toolbar, click the New CallPilot Message icon.
- 2 In the new message window, click the Telephone icon in the toolbar to open the CallPilot Player.
- 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.  
If you are recording from the telephone, answer when it rings. At the tone, record your message. Click Stop to end the recording, then hang up.
- 5 Click To... to open the Address Book, or type the formatted address in the To field. For addressing information, see page 7.
- 6 Add attachments and options if required. See pages 6 and 8.
- 7 On the toolbar, click the Send Message icon.



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

You can record a voice message and save it as a file to use later.

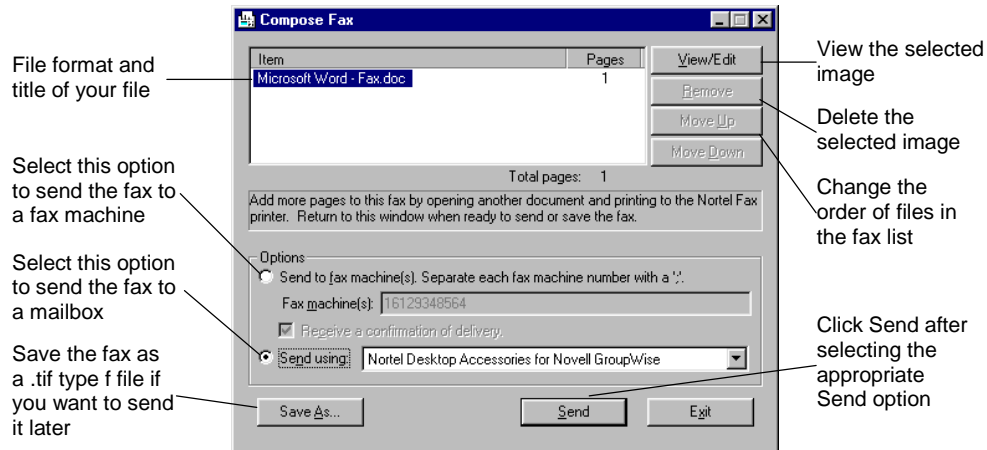
- 1 In a new CallPilot message, record a message, and on the File menu, click Save as... .
- 2 In the File name box, type a name for the file, select a folder to keep the file in, then click Save. Save voice files as .vbk files if your recipients are all CallPilot users, or save them as .wav files if some recipients are non-CallPilot users.

## Composing messages (continued)

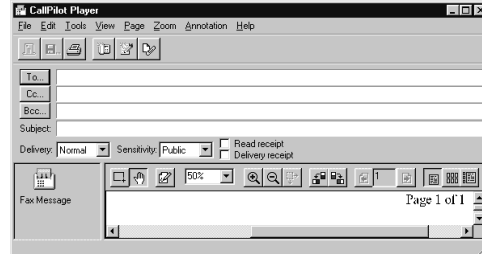
### To create and send a fax message

To send a fax, your CallPilot mailbox must have fax capability. The 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 send your fax to a fax machine.

- 1 Open the document that you want to fax. It must be 8.5 inches (21.5 cm) wide or less.
- 2 On the File menu, click Print.
- 3 From the list of printers, select Nortel Fax, then click Print or OK.
- 4 The Compose Fax dialog box displays. Before sending the fax, you can add more documents, including a cover page, by repeating steps 1 to 3. You can also view the fax, and save it as a file.
- 5 Select a Send option. To send your fax to a fax machine, enter the number(s), then click Send. To send your fax to a CallPilot or e-mail recipient, select Send using..., then click Send.



- 6 If you selected Send using..., a new message window opens, displaying your fax. Click To... to open the Address Book, or type the formatted address in the To field. For addressing information, see page 3.
- 7 Add a voice or text attachment and message options, if required. See pages 6 and 8.
- 8 Click the Send Message icon.



### To create and send a text message

To create a text message, open a new CallPilot message and type or paste plain text into it, then click the Send Message icon. To save a text message as a file, click Save As on the File menu, and save it as a .txt file.

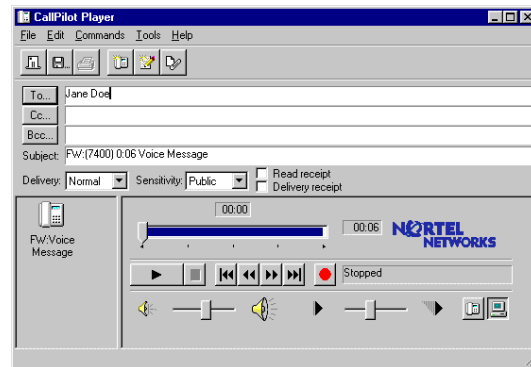
## Forwarding and replying to messages

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

### To forward or reply to a message

- 1 In an open message, click the Forward or Reply icon.
- 2 Follow the steps for composing a message. See page 4.
- 3 Address a forwarded message the same way as a new message. Replies are addressed automatically.

You can change the subject line before sending the message.

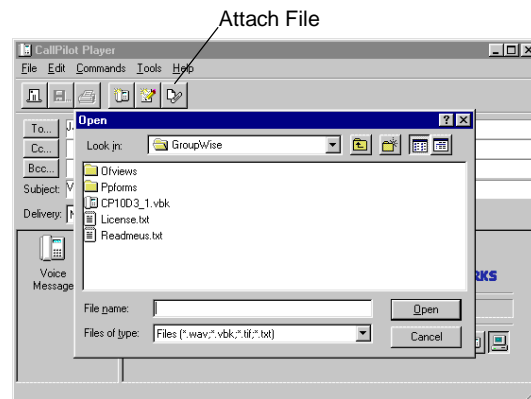


## Adding attachments to messages

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, but must be .wav format for non-CallPilot recipients. Fax files must be .tif type f format. Text files must be .txt format.

### To attach a file to a message

- 1 In a new CallPilot message, click the Attach File icon.
- 2 In the Open File 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.



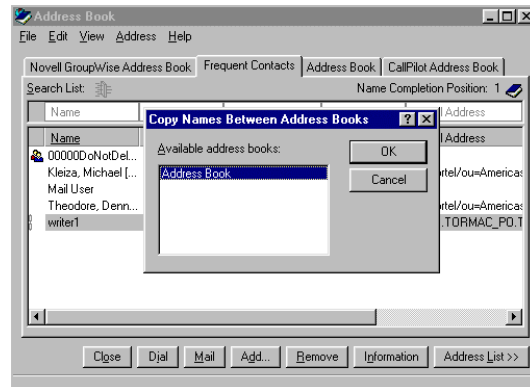
# Addressing messages

## To add CallPilot addresses to your personal Address Book

You can add CallPilot addresses to the list of e-mail addresses in your personal Address Book. You may want to distinguish between CallPilot and e-mail addresses by adding CallPilot after the recipient's name. You can also add distribution list names to your personal Address Book.

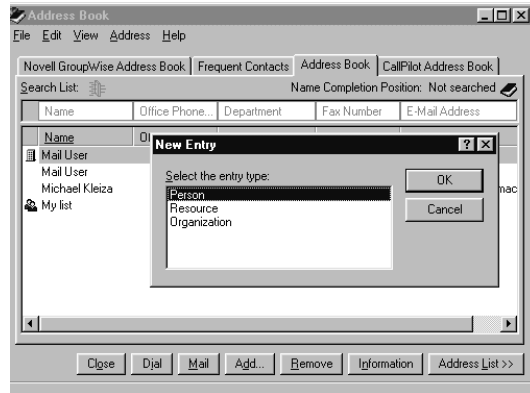
You can add a CallPilot address to your personal Address Book by copying it.

- 1 In the CallPilot Address Book, select and right-click a name.
- 2 Click Copy to... .
- 3 In Copy Names Between Address Books, select the name of your personal Address Book, then click OK.



You can also create an address manually and add it to your personal Address Book.

- 1 On the Tools menu, select Address Book.
- 2 Select your personal Address Book, then click the Add button.
- 3 In New Entry, select Person and click OK.
- 4 In CallPilot - General, select the appropriate address type from the drop-down list. Then enter the required address details. Refer to the online Help for the correct addressing formats. Click OK.



## To address a message from your address book

- 1 In a new CallPilot message, click To... .
- 2 Select CallPilot Address Book or your personal Address Book.
- 3 Select the name of the recipient or distribution list.
- 4 Click Add ->. You can select one or more addresses, clicking Add -> after each one.
- 5 Click OK to return to the new CallPilot message.

## To address a message manually

You can type an address directly into the To field of a new message. Refer to the online Help for the correct addressing formats.

## Creating personal distribution lists

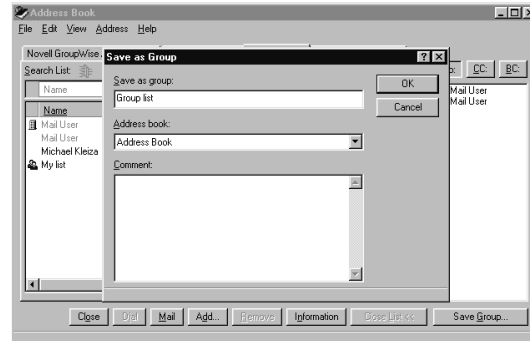
You can create a Desktop Messaging personal distribution list for a group of recipients to whom you frequently send messages. After you create a list, it appears in your personal Address Book. You simply select the list when you address a message. You cannot access these lists from your telephone.

You create a CallPilot personal distribution list in the same way that you create a Novell GroupWise personal distribution list.

### To create a personal distribution list

- 1 On the Tools menu, select Address Book.
- 2 Select CallPilot Address Book or your personal Address Book.
- 3 Select names, clicking To -> after each one.
- 4 Click Save Group.
- 5 In Save as Group, type a name for the list, then click OK.

You can add or delete names for this group. Click Information, then Edit Group.



## Setting message options

In a new CallPilot message, you can set priority, sensitivity, and acknowledgment options.

### To set Delivery priority for a message

Select Urgent, or leave the setting as Normal.

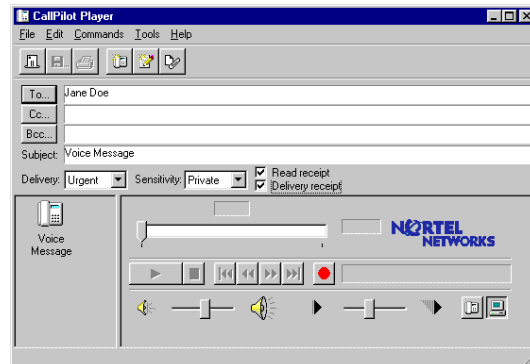
### To set Sensitivity for a message

Select Private, or leave the setting as Public.

Be aware that messages you send marked Private can be forwarded by the recipient. Also, recipients in non-CallPilot systems may not be informed of Private settings. In your message, tell the recipient that the message is Private.

### To request a Read or Delivery receipt

Check Read receipt to request acknowledgment that your recipient opened the message. Check Delivery receipt to request acknowledgment that your recipient received the message.



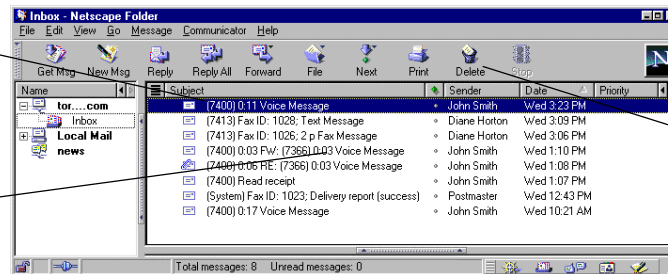
# CallPilot Desktop Messaging for Internet Mail Clients

You can use the following Internet mail applications with CallPilot Desktop Messaging: Netscape Messenger, Microsoft Outlook Express, Microsoft Outlook 98, and Eudora Pro. Check with your administrator for the specific versions of these applications that are supported with this release.

When you open your Internet mail application, you see your CallPilot messages as well as your e-mail messages. You can open, move, copy, delete, forward, and reply to CallPilot messages, and compose new CallPilot messages, in the same way as your e-mail messages.

To open a message, double-click the message line

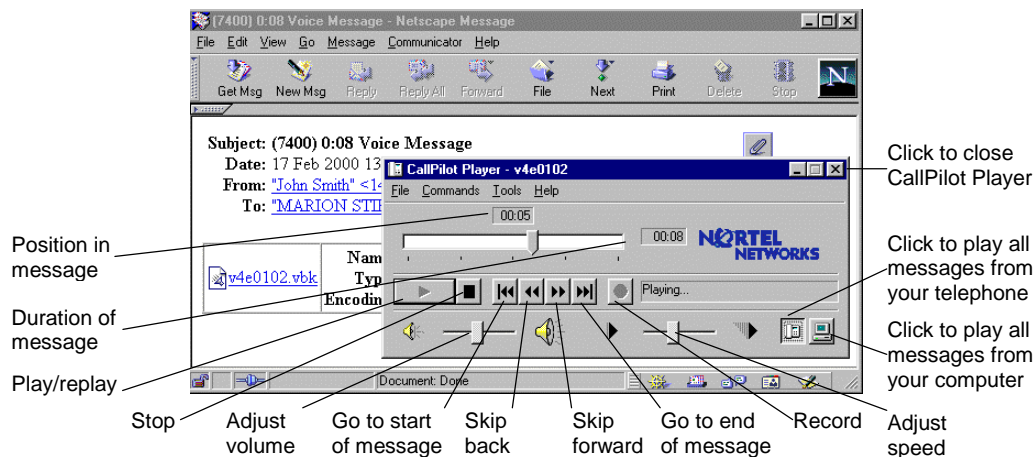
Subject shows sender and message details. Voice messages show duration; fax messages show ID and page count



Deleted messages are deleted immediately or later, depending on your configuration

## Using the CallPilot Player

Use the CallPilot Player to play and record voice messages. To open the CallPilot Player from the Start menu, click Programs, click Nortel Networks CallPilot Desktop Messaging, then click CallPilot Player. Refer to the online Help available with the CallPilot Player for configuration information.



Click to close CallPilot Player

Click to play all messages from your telephone

Click to play all messages from your computer



## Reviewing your messages

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### **To play a voice message**

To play a voice message, click on the message to open it, then click the Voice icon to open the CallPilot Player. On the CallPilot Player, click the Telephone or Computer icon to select the audio device for playing voice messages. You can change this selection at any time. If you select Telephone, the phone rings when you open a message, and the message plays when you answer. If you select Computer, your messages play through your computer's speakers or your headphones.

### **To view a fax message**

To view a fax message, open the message and click on the Fax icon to display the fax image. While viewing the fax, you can enlarge or reduce the image, rotate it, move it, copy it, and print it.

### **To view a text message**

To view a text message, simply open the message. To view a text attachment, click on the Text icon.

## Composing and sending messages

---

In CallPilot Desktop Messaging, you send a voice or fax message by attaching a file to a new message. When addressing the message, use only CallPilot addresses.

### **To compose and send a message**

To compose a message, open a new message window and attach a voice or fax file, or type text, then address and send the message. You may be able to set options such as urgent or private.

### **To forward or reply to a message**

To forward or reply to a message, click Forward, Reply, or Reply All to open a new message. Attach a voice or fax file, or type text, then address and send the message. Replies are self-addressed.

### **To create a voice or fax file**

To create a voice file, open the CallPilot Player and record a voice message. In the File menu, click Save As, enter a name for the file, and save it in .vbk format for CallPilot recipients, or in .wav format for non-CallPilot recipients. Attach this file to a new message.

To create a fax file, open the document that you want to fax, and click Print. In the Print dialog box, select Nortel Fax as the printer and click OK. When the Compose Fax window appears, select a Send option. If you select Send to a fax machine, enter the number(s), then click Send. If you select Send using Nortel Desktop Accessories, click Send. You can add a voice annotation if required, then the Fax Message window appears with the fax file attached. Address the message, then click Send.

### **To attach a file to a message**

To attach a file to a message, click the Attach or Insert File icon or menu item in the new message window. Navigate to the file that you want to attach, select it, then click Open or Attach.

### **To address a message**

Click To... in a new message and select a CallPilot address from your address book, or type a CallPilot address in the To... field. The CallPilot server must be set as the default mail account.

### **To send a message**

After you have created and addressed a new message, a reply, or a forwarded message, click Send.

# CallPilot Web Messaging

Use your Web browser and CallPilot Web Messaging to work with your voice, fax, and text messages.

After you log in, your Message List displays your CallPilot messages. You can open and play voice messages, and view fax and text messages. You can keep each message or delete it.

The screenshot shows the CallPilot Web Messaging interface in a Microsoft Internet Explorer browser window. The interface includes a left sidebar with links for Logout, Messages, Help, About, and Downloads. The main area displays a message list for Mailbox 7366, showing 7 items with 1 new message. The message list has columns for Select, Status, Address, Subject, and Date. The Subject column shows details like sender's phone number and message type (Voice Message, Fax Message, Text Message). The Date column shows the message timestamp. The interface also includes a 'Select a media player' dropdown menu and an 'Update' button. Annotations point to various features: 'Closed envelope shows that a message is new; open envelope shows that a message is read' points to the message status icon; 'To exit CallPilot Web Messaging, click Logout' points to the Logout link; 'Download media players if required' points to the Downloads link; 'To select a message for deletion, place a check mark beside it' points to the Select checkbox; 'To permanently delete a message from your CallPilot mailbox, click Delete' points to the Delete button; 'Select Standard Windows Media Player or CallPilot Player' points to the media player dropdown; 'To open a message, click the Subject area' points to a message subject; 'Indicator tells you when you have new messages' points to the '1 New' indicator; 'To check for new messages, click Update' points to the Update button; and 'Subject shows the sender's phone number, and if the message is voice, fax, or text. Voice messages show duration; fax messages show ID and page count.' points to the Subject column.

Closed envelope shows that a message is new; open envelope shows that a message is read

To exit CallPilot Web Messaging, click Logout

Download media players if required

To select a message for deletion, place a check mark beside it

To permanently delete a message from your CallPilot mailbox, click Delete

Select Standard Windows Media Player or CallPilot Player

To open a message, click the Subject area

Indicator tells you when you have new messages

To check for new messages, click Update

Subject shows the sender's phone number, and if the message is voice, fax, or text. Voice messages show duration; fax messages show ID and page count.

## To install media players

Click the Downloads button to install media players, if they are not already installed on your computer. To play voice messages, you need the CallPilot Player, the Microsoft Windows Media Player, or another WAV-compatible media player. To view fax messages, you need Microsoft Imaging for Windows.

## To select a media player

In the Select a media player box, select Standard or CallPilot.

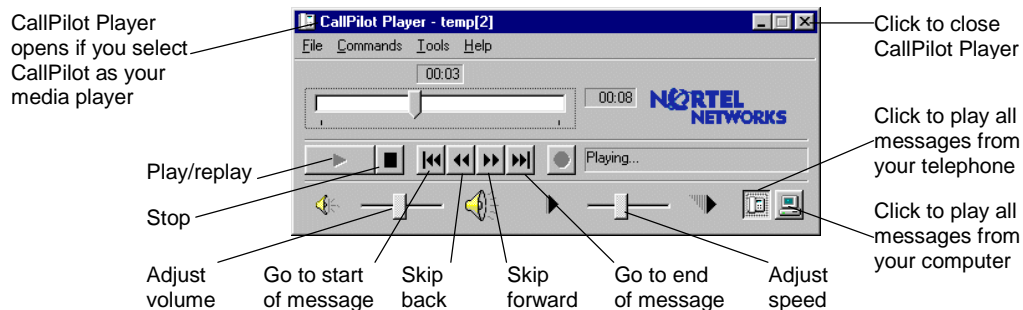
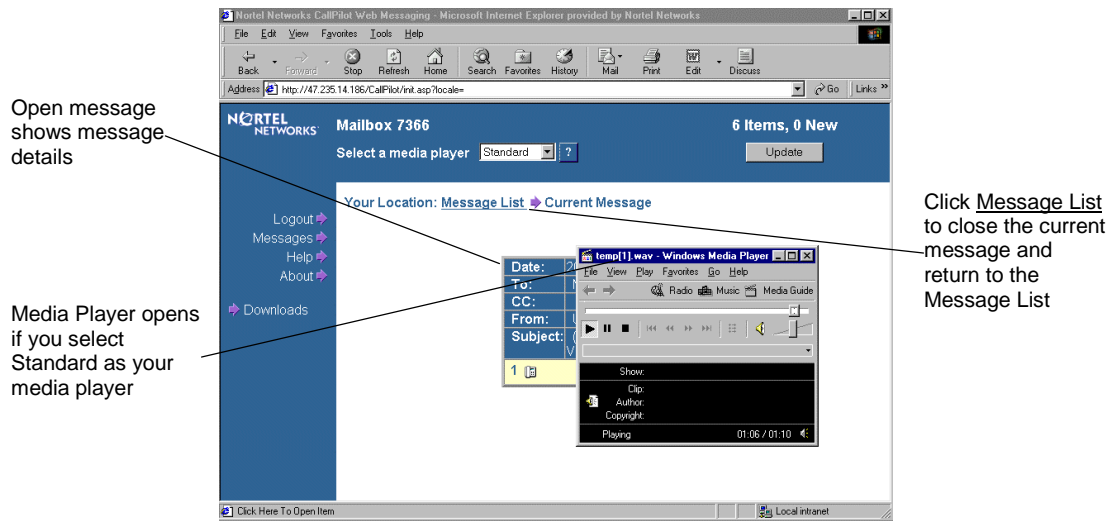
If you select the Standard media player, your voice messages are played by the Microsoft Windows Media Player or other installed WAV-compatible media player through your computer's speakers or your headphones.

If you select CallPilot as your media player, your voice messages are played by the CallPilot Player. You can choose to play voice messages from your computer or your telephone by clicking the Computer or Telephone icon on the CallPilot Player. If your computer is your audio device, the message plays through your computer's speakers or your headphones. If your telephone is your audio device, your telephone rings, and the message plays when you answer.

# Reviewing your messages

## To play a voice message

To open a voice message, click the Subject area of a message in your Message List. The media player that you selected opens and plays the message.



## To view a fax message

To view a fax message, click the Subject area in the Message List to open the message, then click the Fax icon to display the fax image. While viewing the fax, you can enlarge or reduce the image, rotate it, move it, copy it, and print it.

## To view a text message

To view a text message, click the Subject area in the Message List to open the message. To view a text attachment, click the Text icon.

## **CallPilot Desktop Messaging Quick Reference Guide**

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