555-7101-503

# CallPilot

## Desktop Messaging and My CallPilot Administration Guide

Product release 2.5 Standard 1.0 October 2003

NORTEL NETWORKS™

# CallPilot

## Desktop Messaging and My CallPilot Administration Guide


| | |
|---|---|
| Publication number: | 555-7101-503 |
| Product release: | 2.5 |
| Document release: | Standard 1.0 |
| Date: | October 2003 |

CASEWARE is a trademark of Caseware International, Inc.

CONTINUUS is a trademark of Continuus Software Corporation.

CRYSTAL REPORTS is a trademark of Seagate Software Inc.

DEFINITY is a trademark of Avaya Inc.

DIALOGIC, INTEL and VOICEBRIDGE are trademarks of Intel Corporation.

DIVX is a trademark of DivXNetworks, Inc.

EUDORA and QUALCOMM are trademarks of Qualcomm, Inc.

eTrust and InoculateIT are trademarks of Computer Associates Think Inc.

DIRECTX, EXCHANGE.NET, FRONTPAGE, INTERNET EXPLORER, LINKEXCHANGE, MICROSOFT, MICROSOFT EXCHANGE SERVER, MS-DOS, NETMEETING, OUTLOOK, POWERPOINT, VISUAL STUDIO, WINDOWS, WINDOWS MEDIA, and WINDOWS NT are trademarks of Microsoft Corporation.

GROUPWISE and NOVELL are trademarks of Novell Inc.

HITACHI is a trademark of Hitachi Limited.

LOGITECH is a trademark of Logitech, Inc.

LUCENT is a trademark of Lucent Technologies, Inc.

MATRA is a trademark of Matra Hachette.

MCAFFEE and NETSHIELD are trademarks of McAfee Associates, Inc.

MYLEX is a trademark of Mylex Corporation.

NET2PHONE is a trademark of Net2Phone, Inc.

NETOPIA is a trademark of Netopia, Inc.

NETSCAPE COMMUNICATOR is a trademark of Netscape Communications Corporation.

NOTES is a trademark of Lotus Development Corporation.

NORTON ANTIVIRUS and PCANYWHERE are trademarks of Symantec Corporation.

POWERQUEST is a trademark of PowerQuest Corporation.

PROMARK and RHOBOT are trademarks of DMI Promark, Inc.

QUICKTIME is a trademark of Apple Computer, In.

RADISYS is a trademark of Radisys Corporation.

ROLM is a trademark of Siemens ROLM Communications Inc.

SLR4, SLR5, and TANDBERG are trademarks of Tandberg Data ASA.

SONY is a trademark of Sony Corporation.

SYBASE is a trademark of Sybase, Inc.

TEAC is a trademark of TEAC Corporation.

UNIX is a trademark of X/Open Company Limited.

US ROBOTICS, the US ROBOTICS logo, and SPORTSTER are trademarks of US Robotics.

WINAMP is a trademark of Nullsoft, Inc.

WINRUNNER is a trademark of Mercury Interactive Corporation.

WINZIP is a trademark of Nico Mark Computing, Inc.

# Publication history

**October 2003** Standard 1.0 release of CallPilot 2.5 documentation

# Contents

# Chapter 1

# Getting started

## In this chapter

# Introduction

This guide provides instructions for configuring Desktop Messaging e-mail clients, configuring servers for Desktop Messaging and My CallPilot after installation, and troubleshooting information.

This guide is intended for the CallPilot system administrator.

For system requirements, installation instructions, and server configuration information, see the *Desktop Messaging and My CallPilot Installation Guide*.

# Related information products

## Introduction

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

- CallPilot Manager
- My CallPilot
- the Nortel Networks Partner Information Center (PIC) at http://my.nortelnetworks.com

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

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

## Planning and migration guides

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

| Document titles | NTP number |
|---|---|
| *Planning and Engineering Guide* | 555-7101-101 |
| *Installation and Configuration Planner* | not applicable |
| *Meridian Mail to CallPilot Migration Utility Guide* | 555-7101-801 |

## Installation and configuration guides

The guides listed here describe how to install the following:

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

| Document titles | NTP number |
|---|---|
| *Desktop Messaging and My CallPilot Installation Guide* | 555-7101-505 |
| *Installation and Configuration Guide* for your server model<br>This is a collection that contains the following five documents:<br>■ *Part 1: Installation and Maintenance Overview*<br>■ *Part 2: <Server model> Server Hardware Installation*<br>■ *Part 3: <Switch model> and CallPilot Server Configuration*<br>■ *Part 4: Software Installation and Maintenance*<br>■ *Part 5: <Server model> Server Maintenance and Diagnostics* | Refer to your CD-ROM for NTP numbers. |

## Administration guides

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

| Document titles | NTP number |
|---|---|
| *Administrator's Guide* | 555-7101-301 |
| *Reporter Guide* | 555-7101-310 |

| Document titles | NTP number |
|---|---|
| *Application Builder Guide* | 555-7101-325 |
| *Desktop Messaging and My CallPilot Administration Guide* | 555-7101-503 |

## Networking guides

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

| Document titles | CallPilot release | NTP number |
|---|---|---|
| *Networking Enhancements Guide* | 2.5 | 555-7101-507 |
| *Networking Planning Guide* | 2.5 | 555-7101-100 |
| *NMS Implementation and Administration Guide (for systems employing Meridian 1 or Succession 1000 switches only)* | 2.5 | 555-7101-302 |
| *AMIS Networking Implementation and Administration Guide* | 2.5 | 555-7101-303 |
| *Enterprise Networking Implementation and Administration Guide* | 2.5 | 555-7101-304 |
| *Integrated AMIS Networking Implementation and Administration Guide* | 2.5 | 555-7101-305 |
| *VPIM Implementation and Administration Guide* | 2.5 | 555-7101-306 |

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

## End user guides

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

| Document titles |
| --- |
| *Unified Messaging What's New Card* |
| *Unified Messaging Quick Reference Card* |
| *Unified Messaging Wallet Card* |
| *Menu Interface Quick Reference Card* |
| *Alternate Command Interface Quick Reference Card* |
| *Command Comparison Cards* |
| *Multimedia Messaging User Guide* |
| *Speech Activated Messaging User Guide* |
| *Desktop Messaging User Guides* |
| *My CallPilot User Guide* |

## Troubleshooting

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

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

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

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

## Using online sources

### CallPilot administration online Help

The CallPilot Manager and CallPilot Reporter software contain administration online Help areas that provide access to

- technical documentation in Acrobat PDF format
- online help topics in HTML format.

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

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

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

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

### CallPilot end user online Help

The My CallPilot software contains a Useful Information area that provides access to the end-user guides in HTML format. Online user guides in Acrobat PDF format are also available from the Useful Information online Help.

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

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

## Contacting technical support

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

## Contacting Nortel Networks

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

http://www.nortelnetworks.com/callpilot_feedback

# CallPilot 2.5 feature enhancements

## Introduction

In CallPilot 2.5 Desktop Messaging, new feature enhancements enable Desktop Messaging users to:

- perform batch fax operations utilizing MS Word's Mail Merge capability and the new Nortel Fax Printer driver and Nortel Fax Batch Printer driver
- create and manage custom fax cover pages from the CallPilot Desktop Messaging custom form and from the CallPilot Fax Printer form
- use integrated fax controls via the ImageMaker fax application. The user will not be prompted to install Imaging for Windows, which is no longer supported by Microsoft.
- **Desktop Messaging for MS Outlook**
  - send CallPilot messages utilizing the voice and fax numbers fields directly from Microsoft Outlook Contacts both to CallPilot and non-CallPilot users.
  - call the sender of an e-mail message (provided that CallPilot can extract telephone number information from the e-mail sender)
- **Desktop Messaging for Lotus Notes**
  - send CallPilot messages utilizing the voice and fax numbers fields directly from Lotus Notes personal and public address books both to CallPilot and non-CallPilot users.
  - dynamically query and retrieve addresses from the CallPilot address book at any time. This eliminates the need to periodically download the CallPilot address book into the Personal Address Book on a user's PC, or into the Public Address Book on the Domino server.
  - enable or disable Lotus Notes Auto Refresh. Lotus Notes Auto Refresh automatically adds CallPilot messages to the Lotus Notes CallPilot view.
  - change mail databases on the fly without loosing CallPilot Desktop Messaging functionality by providing multiple database support.

- **Desktop Messaging for Macintosh My CallPilot Web Clients**
  - play, record and edit audio messages via a web browser and the CallPilot Player application
  - view and edit faxes via a web browser and the CallPilot Player application
  - send a multiple page fax through the use of a Mac printer driver

In addition:

- CallPilot 2.5 also adds a new class of supported client users by providing connectivity to Citrix Thin Clients running from a Windows Terminal Server. This allows such users to access all the features of the CallPilot Desktop Messaging Client and My CallPilot in that environment.
- CallPilot system administrators have new additional flexibility to customize CallPilot Desktop Messaging installations via the CallPilot 2.5 IniSetup enhancements. This feature is described in detail in the *Desktop Messaging and My CallPilot Installation Guide* and adds additional screens to the IniSetup program.
- CallPilot system administrators also now have the ability to block the distribution of CallPilot voice messages outside of their organization via the My CallPilot Voice Block feature.

# Messaging server compatibility

## Overview

CallPilot 2.5 Desktop Messaging clients work with the following messaging servers:

- CallPilot 2.5
- CallPilot 2.0
- Business Communications Manager (BCM) (Releases 2.5, 3.0, 3.5)
- CallPilot 100 (Release 2.0)
- CallPilot 150 (Release 2.0)

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

## Feature availability

The following feature limitations apply when using Desktop Messaging with CallPilot 100, 150 and BCM servers:

| Feature | Availability |
|---|---|
| Fax and text messaging | CallPilot 2.0, 2.5 and BCM only |
| Read receipts | CallPilot 2.0 and 2.5 only |

| Feature | Availability |
|---|---|
| Trivial password rejection | CallPilot 2.0 and 2.5 only<br>Trivial passwords are composed of simple character strings, such as 1111 or 88888. Since they can be easy to guess, CallPilot 2.0 and 2.5 servers reject trivial passwords. CallPilot 100, 150 and BCM servers accept trivial passwords. Nortel Networks recommends that users avoid defining trivial passwords. |
| Password length | Passwords for CallPilot 2.0 and 2.5 servers can contain up to 16 characters.<br>Passwords for CallPilot 100, 150 and BCM servers can contain up to 8 characters. |
| New message notification | CallPilot 2.5, 2.0, 150(r2.0), 100(r2.0) and BCM(r3.5) servers all automatically notify users of new messages as soon as they arrive. |
| My CallPilot | CallPilot 2.0 and 2.5 only<br>My CallPilot is only available for CallPilot 2.0 and 2.5 servers. |
| Call Sender | CallPilot 2.0 and 2.5 only |
| Restriction of audio device | CallPilot 2.0 and 2.5 only<br>The CallPilot 2.0 and 2.5 servers enable administrators to restrict playback and recording to a single audio device (computer-only or telephone-only). This restriction is not available for the other messaging servers. |

| Feature | Availability |
|---|---|
| View distribution lists in the CallPilot Address Book | CallPilot 2.0 and 2.5 only |
| Addressing messages to distribution lists | CallPilot 2.0 and 2.5 only |
| Time zone information | CallPilot 2.0 and 2.5 servers include time zone information in messages if NMS is installed. The other messaging servers do not include time zone information. For these servers, the sent time and received time are both set to the time that you received the message. |
| Voice Block | CallPilot 2.0, 2.5, and My CallPilot 2.5 |

## Voice format

Different voice formats are used for each messaging server:

| Voice format | Messaging server |
|---|---|
| VBK | CallPilot 2.0 and 2.5 |
| G723.1 | CallPilot 100, 150 |
| G711 | Business Communications Manager |

All formats include the CallPilot VBK header. This header provides message information such as Subject, From, Date, and Length.

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

In My CallPilot, MS Outlook, Lotus Notes and Novell Groupwise, messages are converted to WAV before they are sent to non-CalPilot recipents.

# Chapter 2

# Configuring Desktop Messaging

## In this chapter

# Section A: Getting started

## In this section

# Configuration requirements

## Overview

This chapter describes how to configure e-mail clients. Configuration tasks that users can perform on their own are also available in the README.RTF file on the Desktop Messaging CD.

## Supported clients

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

- **groupware client**—-Groupware is software designed for group collaboration. Desktop Messaging for groupware clients provides access to commands and online Help specific to Desktop Messaging directly from the client. During installation, Desktop Messaging customizes these clients to make messaging tasks simpler and more efficient. Most or all configuration can also be performed automatically during Desktop Messaging installation.
- **Internet mail client**—An e-mail client that enables you to manage CallPilot messages from a folder in the e-mail client using the IMAP protocol. You must manually configure the Internet mail clients with the settings required to connect to the CallPilot server.
- **Citrix Thin Client**—A client computer running a Windows-based OS with Citrix ICA software connected to a Windows Terminal Server with Citrix Metaframe.

Desktop Messaging supports the following clients. Refer to the CallPilot 2.5 General Release Bulletin for the most up-to-date list of clients:

| Groupware clients (including Citrix) | Internet clients (including Citrix) |
|---|---|
| ■ Microsoft Outlook 98 or 2000 (SR-2) in Corporate mode<br>■ Microsoft Outlook 2002 (SR-2)<br>■ Novell GroupWise 6.x<br>■ Lotus Notes 5.x and 6.0 | ■ Microsoft Outlook Express 5.0 or 6.x<br>■ Microsoft Outlook 98 or 2000 (SR-2) in Internet mail mode<br>■ Microsoft Outlook 2002 (SR-2)<br>■ Netscape Mail 6.2x<br>■ Qualcomm Eudora E-mail 5.x |

## Port numbers

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

| Protocol | Unencrypted | SSL encrypted |
|---|---|---|
| HTTP | 80 | 443 |
| IMAP | 143 | 993 |
| SMTP | 25 | 465 |
| LDAP | 389 | 636 |

# CallPilot Fax features

## Fax Mail Merge Feature

The CallPilot Fax Mail Merge feature allows users to customize and send fax messages to multiple (batch) recipients using Microsoft Word's Mail Merge utility. Microsoft's Mail Merge utility allows users to create a single document and customize it for multiple fax recipients based on a database file of recipient information.

All files associated with the Fax Batch feature are installed during Desktop Messaging installation. A check box in the “Additional Options” section of Desktop installation allows the user to install the Fax Batch driver. This checkbox can be set for all users by running the Inisetup wizard. If a user does not select Fax Batch during initial installation, they can reinstall at a later date and select the checkbox to install the Fax Batch driver.

Note that two sample documents are installed with the Fax Batch driver: Sample.doc and Data.doc. By default, these files are installed into the \Program Files\Nortel Networks\CallPilot\nda directory. Sample.doc is a sample customized fax file and Data.doc is the associated sample data source.

### Fax Outcalling Administration

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


### Disk space usage

Disk space usage should be monitored periodically since:

- usage by this feature could become excessive if many faxes are sent to CallPilot mailboxes.
- low disk space alarms could be triggered if many faxes are in the outgoing queue simultaneously.

The Fax Channel Usage Report should be run periodically to determine impact of the Fax Batch feature on the system. If your users generate a large number of fax messages, Nortel Networks recommends setting your Min/Max tables to prevent outgoing message from congesting outbound channels. The Min / Max tables allow administrators to control the number of incoming and outgoing channels.

To understand how these work, the following example is provided. At the server, the Message Transfer Agent scheduler fulfills a fax delivery request in a couple of different ways, depending on the set configuration. For instance, suppose your server has been keycoded for 10 fax ports and in the Outcalling Admin page of CallPilot Manager (under DTF), the number of recipients required for fax broadcast is set to 2. If you then send a fax to 24 recipients, the scheduler allows the the first 10 deliveries to utilize the maximum of 10 fax ports. Following those, the remaining 14 faxes will only be delivered via a maximum of 2 fax ports, since the MTA scheduler now considers this a fax broadcast. If higher delivery performance is required, the number of ports used for fax broadcast can be increased using the CallPilot Manager application.

## ImageMaker Cover Page Designer and Generator

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

The CallPilot Desktop Messaging installation CD-ROM contains a separate folder with the ImageMaker Cover Page Designer and Generator software. This software is used by the administrator to build and manage the custom cover pages. Refer to the Help section of the application for additional information.

The administrator will be able to distribute newly created custom cover pages to all users by adding cover page files (.TIF and . CVR) to the cvrpages folder in the same directory as Setup.exe. During installation Setup.exe will copy those files onto users' PC.

Using inisetup.exe, the system administrator can point all end-users to a shared network folder that contains the cover pages. For more information see the “Using the Inisetup Wizard” section in the *Desktop Messaging and My CallPilot Installation Guide*.

# Section B: Configuring groupware clients

## In this section

# Configuring Microsoft Outlook

## Introduction

Microsoft Outlook is automatically configured during Desktop Messaging installation.

If desired, you can change the destination folder for storing CallPilot messages in Microsoft Outlook after installation. This section describes how to change the destination folder.

## Selecting a folder for CallPilot messages

By default, the Desktop Messaging installation program automatically configures your default Outlook mail profile for use with Desktop Messaging. It configures the e-mail client so that CallPilot messages are stored in a separate message store from the default e-mail inbox.

Nortel Networks recommends that you keep your CallPilot messages separate from your e-mail messages. By keeping CallPilot messages separate, it is easier to prioritize messages and identify message types.

If desired, you can configure Outlook to store all incoming e-mail and CallPilot messages in the CallPilot message store.

**Note:** If you configure your e-mail client to deliver messages to the CallPilot Inbox, all e-mail messages are stored on your hard drive. Once delivered, the e-mail messages no longer reside on the Exchange server.

### To specify where to deliver e-mail messages in Outlook 2002 (Office XP client)

1. Choose Tools>E-mail Accounts. The E-mail Accounts wizard appears.
2. Choose View or change existing e-mail accounts, and then click Next.

3 In the Deliver new e-mail to the following location list, choose the destination for your e-mail messages.

4 Click Finish to save your changes.

### To specify where to deliver e-mail messages in previous versions of Outlook

1 Choose Tools>Services. The Services dialog box appears.

2 Click the Delivery tab.

3 In the Deliver new mail to the following location list, choose the desired destination for your e-mail messages.

4 Click OK to save your changes.

# Configuring Novell GroupWise

## Introduction

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

## Moving messages

By default, CallPilot messages are stored in a separate message store from the default GroupWise inbox.

You can move CallPilot messages to other GroupWise folders, but Nortel does not recommended or support this action. The CallPilot Desktop Messaging folder includes CallPilot date and time information. If you move messages to other folders, these columns display inaccurate information.

**Note:** Custom Date and Time fields are created on the GroupWise server the first time Desktop Messaging for GroupWise is installed. The fields remain until the GroupWise server is rebuilt. GroupWise and GroupWise applications are not affected by these fields.

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

# Configuring Lotus Notes

## Introduction

This section provides the following configuration details:

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

## Updating the Mail database design

In Lotus Notes, the Mail database design determines which messages appear in the Notes message list. There are two ways to update the database design for Desktop Messaging:

- **automatic update**—Update the database automatically during Desktop Messaging installation (recommended).
- **manual update**—Update the database manually after Desktop Messaging installation.

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

**Important:** Whether the automatic or manual update option is used, a user needs sufficient access rights to update Mail database templates during the desktop installation. Lotus Notes 5.x users need Designer or Manager rights. Lotus Notes 6 users need Manager rights.

### Updating the database automatically

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

When you use this update method, Notes stores CallPilot messages in a separate view. This configuration lets you easily prioritize CallPilot messages since they are not mixed with e-mail messages.

### Updating the database manually

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

Alternatively, a Lotus Notes administrator or user can *replace* the database design. Replacement of the mail database removes all customization to the database. Administrators and users should only replace the database under special circumstances. Users may consider replacing database design only if they want CallPilot messages to be placed within the Lotus Notes Inbox, along with e-mail messages. For more information, see "Replacing the mail database design in Lotus Notes" on page 133.

### To update the database design from the Lotus Notes server

1. Install Desktop Messaging on the Lotus Notes server computer by running LNSERVER.EXE from the Desktop Messaging CD.
2. Start Update database design. From the Start menu, choose Programs>Nortel CallPilot Desktop Messaging>Update Database Design. The Update CallPilot mail databases dialog box appears.
3. Select Add CallPilot components, and then click OK. The Select database(s) dialog box appears.
4. Select mail files to update, and then click Open.

## Setting up the CallPilot Address Book

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

- **In Lotus Notes Personal Address Book**—Users can access address information downloaded from the CallPilot server to the Personal Address Book located on the user PC. This option is useful when users travel since they do not need to be connected to the network to address messages. Users must manually download the address information from the CallPilot server regularly to ensure that address information is up to date.
- **In the special Lotus Notes Public Address Book designed to store CallPilot address information on the Lotus Notes server**—Users can access address information downloaded from the CallPilot server to the special Public Address Bok located on the Lotus Notes server. By using this method, users do not need to manage a local copy of the address book. In addition, this method saves disk space and slightly reduces LAN traffic.

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

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

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

### To install the CallPilot database

1 Insert the CallPilot Desktop Messaging CD in the Lotus Notes server CD-ROM drive.

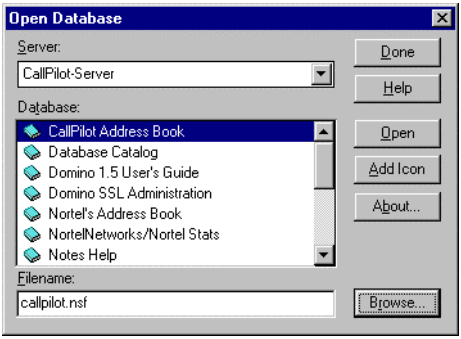
2 Run LNSERVER.EXE. An empty callpilot.nsf is copied to the Lotus Notes server.

### To add the CallPilot database to the Lotus Notes workspace

1 From the Lotus Notes workspace, choose File>Database>Open. The Open Database dialog box appears.

2 Open the Lotus Notes database from the Server.

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




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

4 Click Select or Open.

5 Press Add Icon to add the icon to the Server Workspace. The new icon appears on the Lotus Notes server workspace.

6 Click the icon, then open the address book.

7 Choose View>CallPilot (People).

8 Choose Actions>Download CallPilot Address Book.

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

9 If the Download CallPilot Address Book command is disabled on the Actions menu, do the following:

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

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

**c.** Choose Edit>Properties.

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

**e.** Close the Properties window. The Download CallPilot Address Book command should now be available.

### To set up the automatic update utility

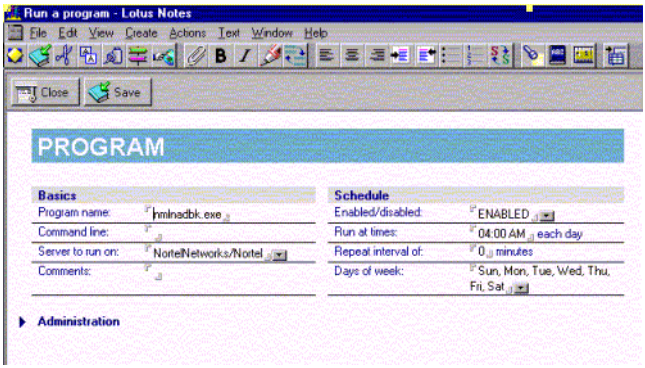
1 Run LNSERVER.EXE if it has not already been run.

2 To avoid entering the Lotus Notes password multiple times, configure Notes to share the Notes password with Notes programs. For more information, see “Password prompts” on page 40.

3 Open the Public Address Book.

4 Navigate to Folders and Views/Servers/Program.

5 Select Program, and then click Add Program. The Program page appears.




6 Type nmlnadbk.exe in the Program name box. Ensure the Command line box is empty.

7 Set Enabled/disabled to ENABLED.

8 Select the time and frequency that you want the update utility to run.

9 Click Save, and then close the dialog box. Notes updates the address book based on the specified schedule.

## Password prompts

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

### To disable the Notes password prompt for Desktop Messaging

1 In Notes, choose File>Tools>User ID. The Enter Password dialog box appears.

2 Type your Notes password, and then click OK. The User ID dialog box appears.

3 Check the option: “Don’t prompt for a password from other Notes-based programs.

4 Click OK.

## Enabling the Lotus Notes Auto-refresh feature

The Lotus Notes Auto refresh feature will automatically display new CallPilot messages in the user's inbox as they arrive. This feature is configurable from the desktop configuration dialog box and also from inisetup.exe. In CallPilot 2.5 this feature is disabled by default, since it does generate additional network traffic. The larger the mailbox the more network traffic generated. When this feature is disabled, users can see their new CallPilot messages by refreshing their CallPilot view. The Message Waiting Indicator light will let them know when new CallPilot messages arrive (in CallPilot 2.02 and earlier releases, this feature was enabled and could not be disabled.)

# Section C: Configuring Internet mail clients

## In this section

# Configuration overview

## Introduction

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

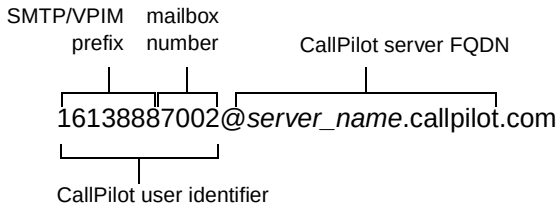
This section lists requirements for supported clients and provides an overview of how CallPilot configuration works for these clients.

## Requirements

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

- the CallPilot mailbox number and password
- the SMTP/VPIM prefix of the CallPilot server
- the fully qualified domain name (FQDN) or CLAN IP address of the CallPilot server
- the search base to use for address searches in the CallPilot directory

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



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

| Setting in your e-mail client | Required CallPilot information |
|---|---|
| **IMAP server name**<br>The mail server for incoming mail. | Use the CallPilot server FQDN or CLAN IP address. |
| **SMTP server name**<br>The server for outgoing mail. | Use the CallPilot server FQDN or CLAN IP address. |
| **LDAP server name**<br>The directory server that contains the CallPilot Address Book. | Use the CallPilot server FQDN or CLAN IP address. |
| **LDAP search base**<br>The criteria used to locate CallPilot addresses on the LDAP server. | Use the search base configured on your LDAP server with the prefix that identifies the type of addresses you want to access. For more information, see “Connecting to the CallPilot Address Book” on page 44. |
| **User name**<br>The name that uniquely identifies your mailbox. | Use your CallPilot user identifier. |
| **Text settings**<br>Ensure that messages you send from your CallPilot mailbox are in plain text format. | Ensure that your e-mail client is configured to send messages in plain text format. |
| **Encryption settings** | If your CallPilot server supports SSL encryption (IMAP and STMP protocols only, not LDAP when using Internet mail clients), you can enable SSL encryption in your e-mail client to increase the security of your messages. |

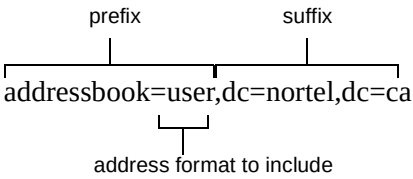
CallPilot administrators should provide the server information and SMTP/VPIM prefix to users who need to manually configure Desktop Messaging. You can also obtain the components of the CallPilot address from CallPilot Player. Choose View>Options. Click the General tab to view the mailbox and server settings.

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

## Connecting to the CallPilot Address Book

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

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




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

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

| address types | prefix |
|---|---|
| individual recipients | addressbook=user |

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

# Configuring Microsoft Outlook Express or Microsoft Outlook

## Introduction

This section describes how to configure the following e-mail clients:

- Microsoft Outlook Express
- Microsoft Outlook 98 or 2000 (in Internet Mail mode)
- Microsoft Outlook 2002 (Microsoft Office XP client) if you are using it as an IMAP client

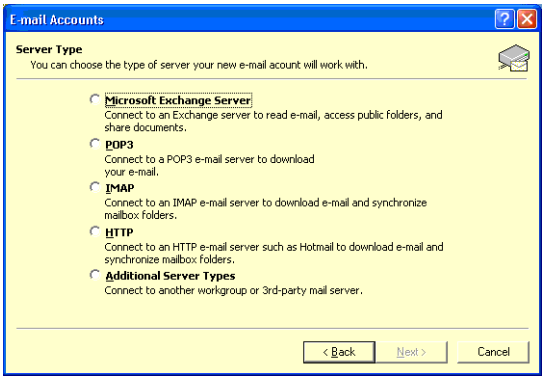
Before you begin, ensure that you have all the information required to configure an Internet mail client. For more information, see “Requirements” on page 42.

# Outlook 2002

## To define your CallPilot mailbox settings

1 Choose Tools>E-mail Accounts. The E-mail Accounts wizard appears.

2 Select Add a new e-mail account, and then click Next. The E-mail Servers page appears.




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

4 Specify the settings for your CallPilot mailbox.

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

  *<SMTP/VPIM prefix><mailbox number>@<local CallPilot server>*

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

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

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

5 Click Next. A confirmation page appears.

6 Click Finish.

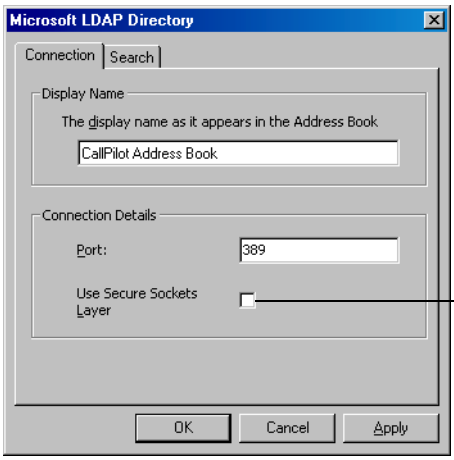
### To configure access to the CallPilot Address Book

1. Choose Tools>E-mail Accounts. The E-mail Accounts wizard appears.
2. Select Add a new directory or address book, and then click Next.
3. Choose Internet Directory Service (LDAP) and then click Next.
4. Specify the following information:
   - In the Server Name box, type the CallPilot FQDN.
   - If the CallPilot Address Book requires you to log on, check the This server requires me to log on box, then type your mailbox number and password in the User name and Password boxes. The User name for LDAP logon uses the following format:

     *mail=<SMTP/VPIM prefix><mailbox number>@<local CallPilot server>,<Search base>*

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

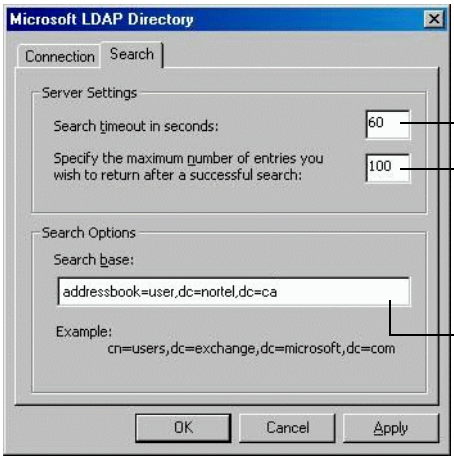
   **Note:** You must log on to the CallPilot Address Book to view distribution list addresses.
5. Click More Settings. The Microsoft LDAP Directory dialog box appears.
6. Click the Connection tab.



**7** Perform the following steps:

- In the Display Name box, type a descriptive name for the address book (for example “CallPilot Address Book”).
- Do NOT check the Use Secure Sockets Layer box. SSL over the LDAP protocol is not supported by the Internet Mail Clients.

**8** Click the Search tab.




If your network is slow, increase the timeout value.

Type the maximum number of entries to return for a search.

Type the LDAP search base in the appropriate format. For details, see “Connecting to the CallPilot Address Book” on page 44.

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

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

**11** Click Finish.

### To configure text formatting

**1** Choose Tools>Options.

**2** Click the Mail Format tab.

**3** In the Message Format section, select Plain Text.

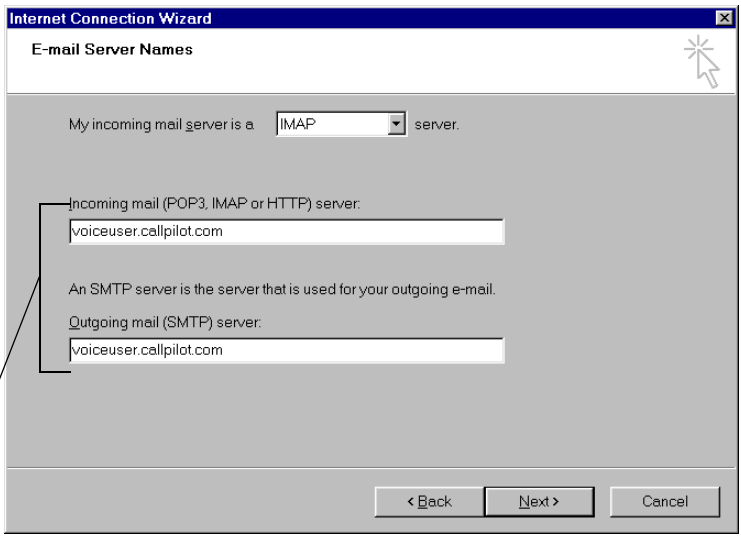
**4** Click OK.

## Outlook Express, Outlook 2000, or Outlook 98

### To define your CallPilot mailbox settings

1. Choose Tools>Accounts.
2. Click the Mail tab.
3. Click Add, and then choose Mail. The Internet Connection Wizard starts.
4. Type your name in the Display name box.
5. Click Next. The Internet E-mail Address page appears.
6. Type your CallPilot address in the E-mail address box. Your address should be in the following form:

   *<SMTP/VPIM prefix><mailbox number>@<local CallPilot server>*
7. Click Next. The E-mail Server Names page appears.




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

8. Select IMAP as the incoming mail server type.

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

**10** Type your CallPilot mailbox password in the Password box.

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

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

**12** Type a name to identify the CallPilot IMAP account in the Internet mail account name box.

**Example:** You can type in your first name or full name, or you can type a name that identifies the purpose of the account.

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

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

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

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

**a.** Choose Tools>Accounts.

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

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

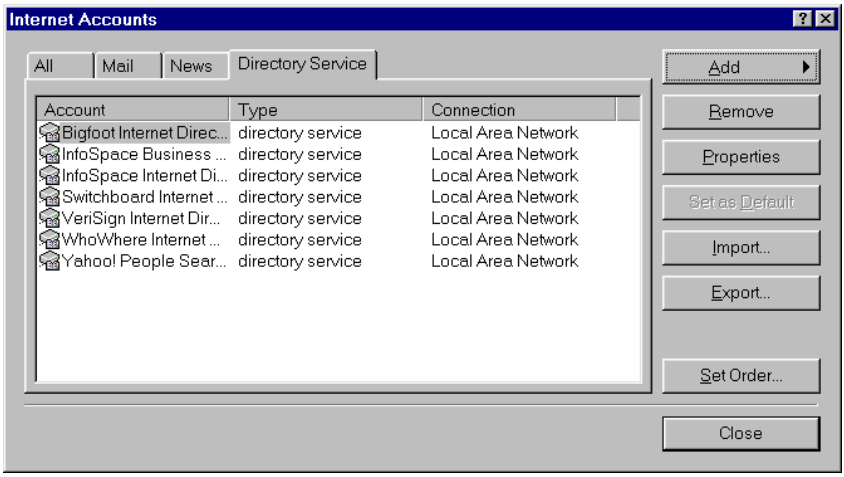
For example, if you want to enable SSL for incoming or outgoing messages, click the Advanced tab, then check the This server requires a secure connection (SSL) box, as required.

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

### To configure access to the CallPilot Address Book

1 Choose Tools>Accounts.

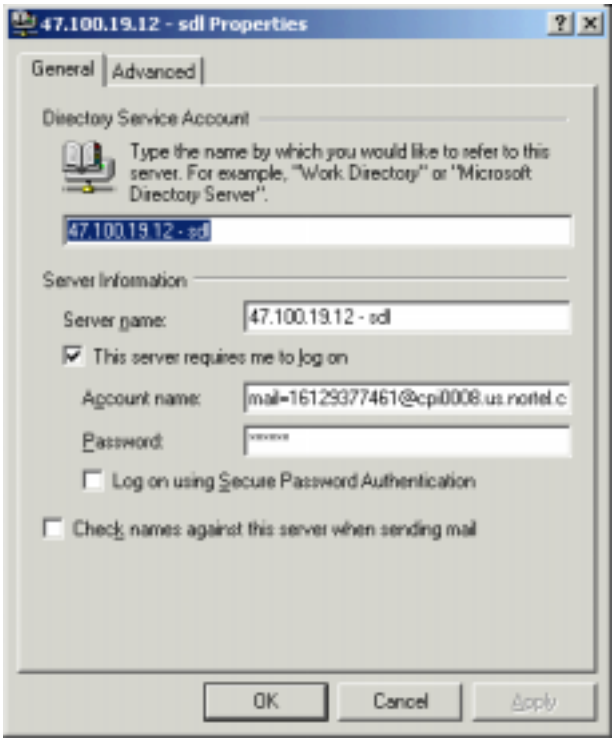
2 Click the Directory Service tab.




3 Click Add, and then choose Directory Service. The Internet Connection Wizard starts.

4 On the Internet Directory Server Name page, specify the following:

- Type the CallPilot server FQDN in the Internet directory (LDAP server) box.




- If you want to access your Broadcast, Shared or Personal Distribution lists you must select the "This server requires me to log on" checkbox. Enter your Account name as follows:

  *mail=<SMTP/VPIM> <mailbox number>@<local CallPilot server>,<Search base>*

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

Enter your CallPilot Password for this mailbox.

**Note:** If you will be setting your search base (advanced tab) to only search for users, you do not need to select the "This server requires me to log on" checkbox.

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

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

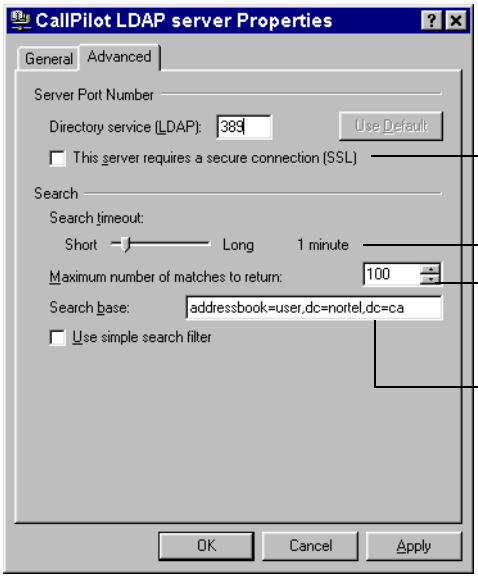
**7** Click Next. The Congratulations page appears.

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

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

**10** Click the Advanced tab.

**11** Specify the appropriate options.




Do NOT check this box to use SSL encryption. SSL is not supported for the LDAP protocol when using Internet Mail Clients.

If your network is slow, increase the time-out value.

Type the maximum number of entries to return for a search.

Type the LDAP search base in the appropriate format. For details, see “Connecting to the CallPilot Address Book” on page 44.

**Note:** Currently, Outlook Express 6 uses a version of the LDAP protocol that CallPilot does not support. If you want to use LDAP, you should use Outlook Express version 5 with CallPilot.

**12** Click OK.

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

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

**15** Click Close.

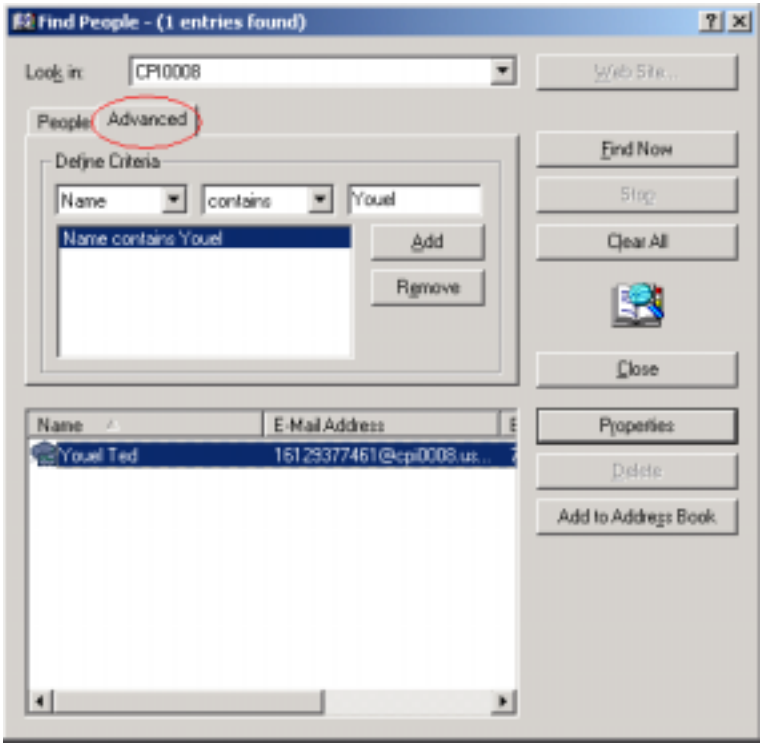
### To search a CallPilot directory for names

1 When searching for names in a CallPilot directory, you **must** use the Advanced tab of the Find People dialog. You will be unable to search for CallPilot records if you don't use the Advanced tab.

2 To open this dialog box from Outlook Express 5.0:

**a.** Select the Addresses toolbar icon

**b.** Choose Find People toolbar button. The Find People dialog box appears.




3 Choose the CallPilot directory you want to search from the Look in: dropdown menu.

4 In the Define Criteria section, set up the search you want to conduct by choosing the appropriate values from the dropdown menus and entering the person's name in the text field above the Add button.

5 If the structure of the search is correct, click the Add button. The search string is displayed in the field below the dropdown menus. The Remove button will delete the search string from this window.

6 Click the Find Now button to run the search. Results will be displayed in the text field at the bottom of the dialog box.

7 You can select one or more of the entries returned by the search and add them to your Address Book by clicking the Add to Address Book button.

### To configure text formatting

1 If you are using Outlook Express, check the following settings:

   **a.** Choose Tools>Options.

   **b.** Click the Send tab.

   **c.** In the Mail sending format section, choose Plain Text.

   **d.** Click Plain Text Settings. The Plain Text Settings dialog box appears.

   **e.** In the Message format section, choose MIME.

   **f.** In the Encode text using list, choose None.

   **g.** Click OK.

2 If you are using Outlook, check the following settings:

   **a.** Choose Tools>Options.

   **b.** Click the Mail Format tab.

   **c.** In the Message Format section, select Plain Text.

   **d.** Click OK.

3 If you add addresses from the CallPilot LDAP directory to your Outlook Express personal address book, check the following setting:

   **a.** In the personal address book, right-click the recipient name. On the pop-up menu, click Properties. The Properties dialog box appears.

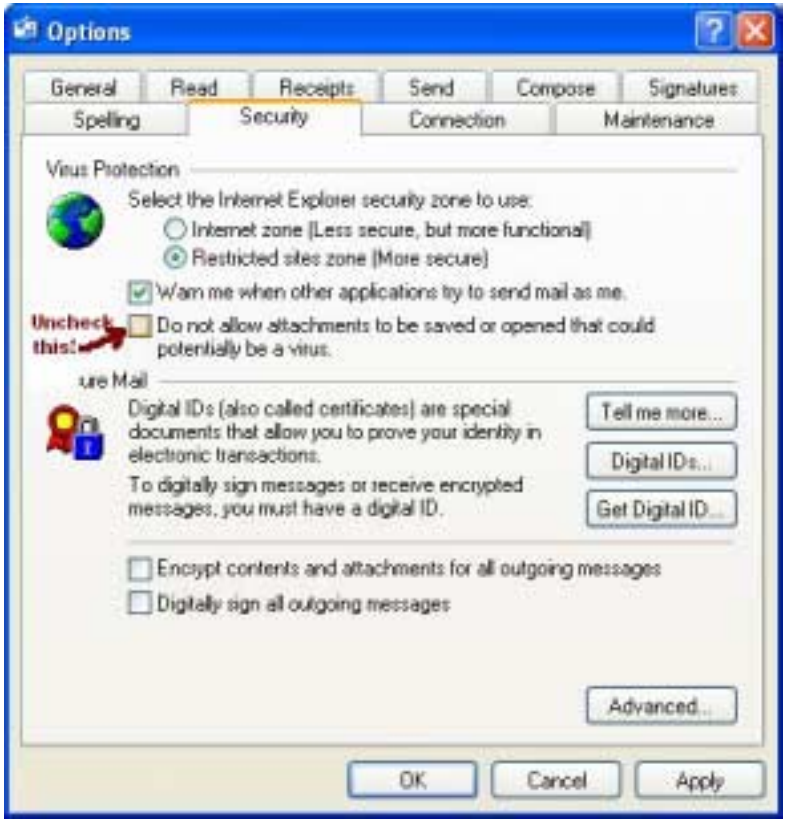
   **b.** Click the Name tab.

   **c.** Ensure that Send E-Mail using plain text only is checked.

### To enable the viewing of faxes

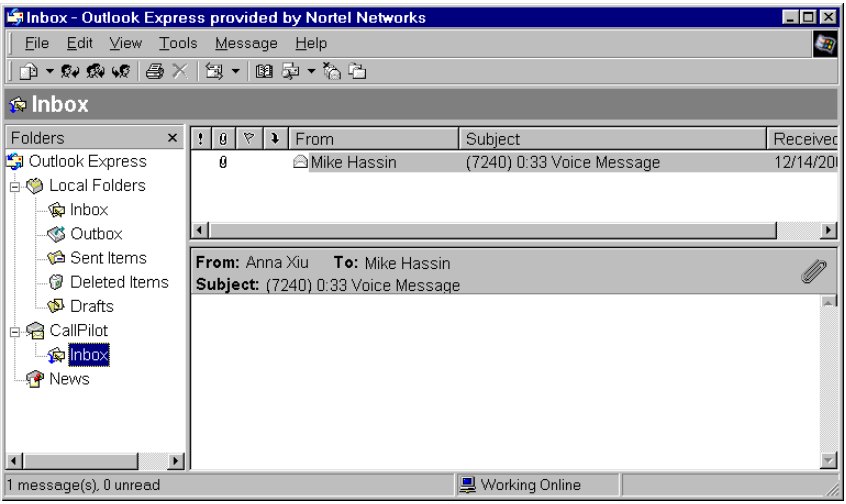
If you are using Outlook Express 6.0, check the following setting:

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



## To test your Desktop Messaging account

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



# Configuring Netscape Mail

## Introduction

This section describes how to configure Netscape Mail 6.2x or later for use with Desktop Messaging.

Before you begin, ensure that you have all the information required to configure an Internet mail client. For more information, see “Requirements” on page 42.

**Note:** If Netscape is set up with a POP e-mail account, you must set up a different Netscape user profile for CallPilot. You cannot use a single profile for accessing both POP and IMAP accounts.

### Defining outgoing mail server settings in Netscape

Netscape is designed for use with a single outgoing (SMTP) server. CallPilot messages must be sent using the CallPilot server—you cannot use a different outgoing server for CallPilot messages. Ensure that you follow these guidelines to ensure proper configuration of Netscape:

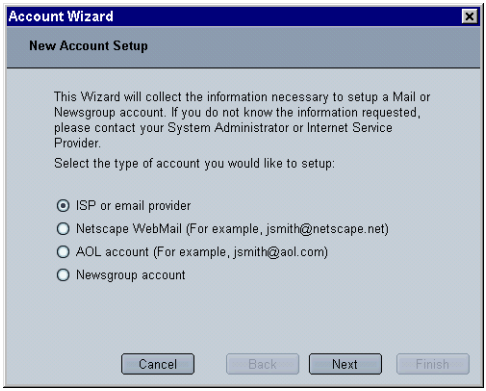
If you plan to use multiple mail accounts in Netscape, ensure that you specify a separate outgoing server for CallPilot. The CallPilot server should not be set as the default outgoing mail server for all your mail accounts. CallPilot server rejects e-mail messages with addresses or attachment types that are not supported by CallPilot.

### Feature limitations

Netscape 6.2 and 7.0 releases do not support authenticated logon to an LDAP server. Without this support, you cannot view distribution lists in the CallPilot Address Book.

## To define your CallPilot mailbox settings

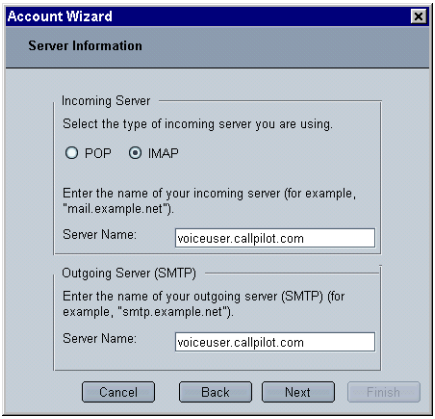
1. From the main Netscape window, choose Tasks>Mail & Newsgroups. The Mail & Newsgroups window appears.
2. Choose File>New>Account. The Account Wizard appears.



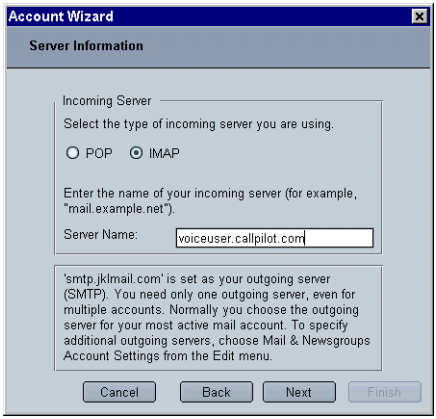

3. Select ISP or e-mail provider, and then click Next.
4. On the Identify page, type your name and CallPilot address in the boxes, and then click Next. Your address should be in the following form:

   *<SMTP/VPIM prefix><mailbox number>@<local CallPilot server>*
5. On the Server Information page, select IMAP.
6. In the Incoming Server section, type the CallPilot FQDN in the Server Name box.
7. In the Outgoing Server section, type the CallPilot FQDN in the Server Name box, and then click Next.

   The Outgoing Server box only appears if a default outgoing mail server is not defined in Netscape. If a server is already defined, complete the configuration in the Account Wizard, and then follow the instructions in the procedure “To specify CallPilot server as the outgoing mail server”, which follows.




If an outgoing server is not defined, type the CallPilot FQDN.




If an outgoing server is already defined, you must associate your CallPilot mailbox with the CallPiot server once you are finished in the Account Wizard.

**Note:**

- You must use the CallPilot server as the outgoing mail server for your CallPilot mailbox.
- Do not select CallPilot server as your outgoing mail server for other mail accounts that you set up in Netscape. CallPilot server rejects e-mail messages with addresses or attachment types that are not supported by CallPilot.

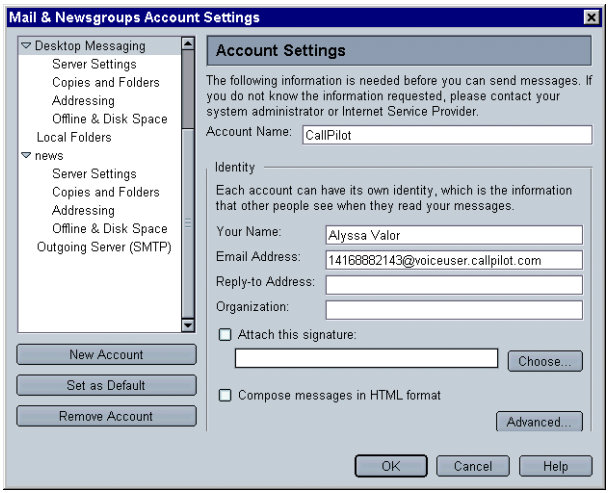
**8** On the User Name page, type your CallPilot user identifier, then click Next.

**9** On the Account Name page, type a name for your CallPilot mailbox to help you to identify it in Netscape Mail, then click Next.

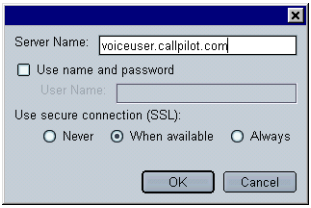
**10** On the Congratulations page, verify your CallPilot mailbox information, then click Finish.

## To specify CallPilot server as the outgoing mail server

1. From the main Netscape window, choose Tasks>Mail & Newsgroups. The Mail & Newsgroups window appears.
2. Choose Edit>Mail & Newsgroups Account Settings. The Mail & Newsgroups Account Settings window appears.




3. In the account list, select Outgoing Server (SMTP).
4. Click Advanced. The Advanced Outgoing Server (SMTP) window appears.
5. Click Add. A new window appears.




6. Specify the server settings.
   a. In the Server Name box, type the CallPilot server FQDN.

**b.** Ensure that the User name and password check box is not selected.

**c.** In the Use Secure connection (SSL) section, select Enable or Disable.

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

**e.** Click OK to accept the list of outgoing servers.

**7** In the account list, select your CallPilot account.

**8** On the Account Settings page, click Advanced. The Advanced Account settings dialog box appears.

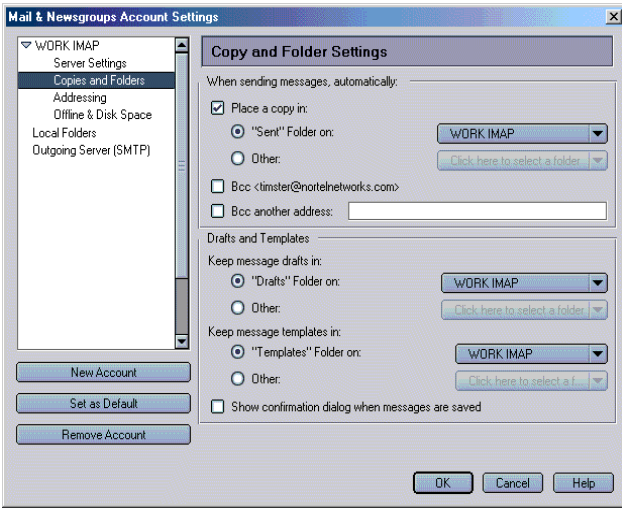
**9** In the Server list, select the CallPilot server.

**10** Click OK.

## To configure Copy and Folder settings

**1** From the main Netscape window, choose Tasks>Mail & Newsgroups. The Mail & Newsgroups window appears.

**2** Choose Edit>Mail & Newsgroups Account Settings. The Mail & Newsgroups Account Settings window appears.




**3** In the account list, select Copies and Folders.

4 For Place a Copy in, select Other.

5 Change the location to Local Folders>Sent.

6 For Keep Message Drafts in, select Other.

7 Change the location to Local Folders>Drafts.

8 For Keep Message Templates in, select Other.

9 Change the location to Local Folders>Templates.

## To configure text formatting

1 From the main Netscape window, choose Edit>Preferences. The Preferences window appears.

2 In the Mail & Newsgroups category, select Send Format.

3 Select Convert the message to plain text.

4 Click OK.

5 Choose Tasks>Mail & Newsgroups. The Mail & Newsgroups window appears.

6 Choose Edit>Mail & Newsgroups Account Settings. The Mail & Newsgroups Account Settings window appears.

7 In the account list, select the name of your account.

8 In the Account Settings pane, clear the Compose messages in HTML format check box.

9 Click OK.

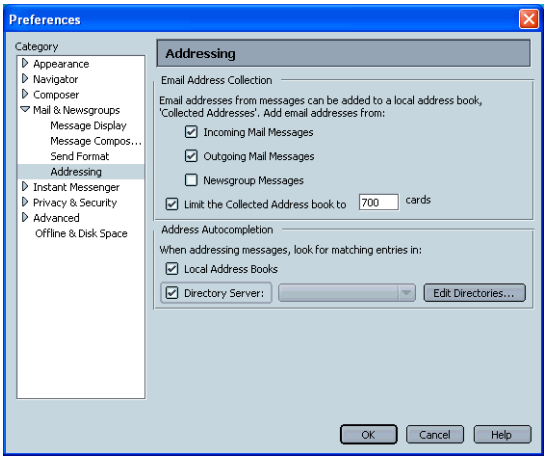
## To configure access to the CallPilot Address Book

**Note:** Since Netscape 6 does not support an authenticated logon to an LDAP server, you cannot view distribution lists in the CallPilot Address Book. You can only view individual CallPilot addresses.

1 Choose Tasks>Mail & Newsgroups. The Mail & Newsgroups window appears.

2 Choose Edit>Preferences. The Preferences window appears.

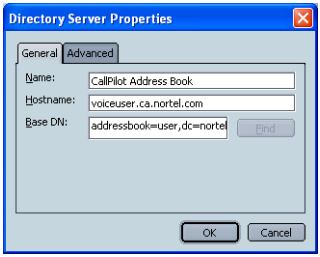
**3** In the Mail & Newsgroups category, select Addressing.




**4** In the Address Autocompletion section, check both the Local Address Books and Directory Server options.

**5** Click Edit Directories. The LDAP Directory Servers window appears.

**6** Click Add. The Directory Server Properties dialog box appears.




**7** Specify the connection information for the CallPilot Address Book:

**a.** In the Name box, type a name for the CallPilot Address Book to help you to identify it.

**b.** In the Hostname box, type the CallPilot server FQDN.

**c.** In the Base DN box, type the LDAP search base for viewing individual addresses only.

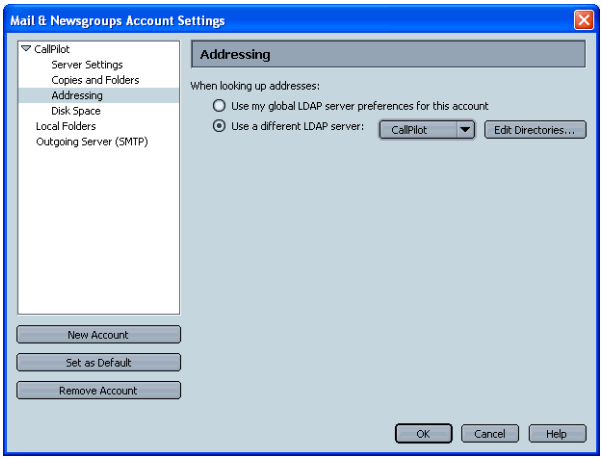
**addressbook=user, <*search base suffix*>**

For more information about the search base syntax, see “Connecting to the CallPilot Address Book” on page 44.

**8** Click OK, and then exit the LDAP Directory Servers window.

**9** Choose Edit>Mail & Newsgroups Account Settings. The Mail & Newsgroups Account Settings window appears.

**10** Expand your mail account list and then select Addressing.




**11** Select Use a different LDAP server, and then select the CallPilot Address Book (the server you added in step 7) from the server list.

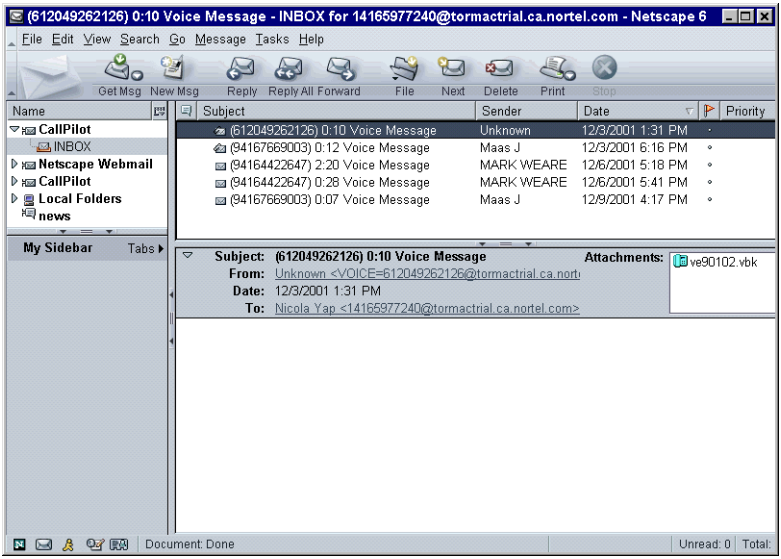
**12** Click OK.

## To test your Desktop Messaging account

**1** Exit and restart Netscape Mail to ensure that your new settings take effect.

**2** Use your telephone to log on to your CallPilot mailbox.

**3** Compose a test voice message and send it to yourself. The message appears in your CallPilot Inbox.



# Configuring Qualcomm Eudora E-mail

## Introduction

This section describes how to configure Qualcomm Eudora E-mail for use with Desktop Messaging.

To change any part of this configuration after it is complete, select Tools>Options in Eudora.

Before you begin, ensure that you have all the information required to configure an Internet mail client. For more information, see “Requirements” on page 42.

**Note:** The configuration instructions below assume that you have an existing mail account in Eudora, and that you are setting up Desktop Messaging as an additional mail account. If you do not have an existing mail account defined in Eudora, the New Account Wizard appears when you start Eudora.

## To define your CallPilot mailbox settings

1. In Eudora, choose Tools>Personalities. The personalities list displays a list of your mail accounts in the left pane.
2. Right-click in the personalities list, then choose New from the context menu. The New Account Wizard appears.
3. Click Next. On the Account Settings page, choose Create a brand new e-mail account.
4. Click Next. On the Personal Information page, type your name in the Your Name box.
5. Click Next. On the E-mail Address page, type your CallPilot address in the E-mail Address box. Your address should be in the following form:

   *<SMTP/VPIM prefix><mailbox number>@<local CallPilot server>*

6 Click Next. On the Login Name page, verify that the Logon Name box contains your CallPilot user identifier.

7 Click Next. On the Incoming E-mail Server page, verify that the Incoming Server box contains the FQDN of the CallPilot server.

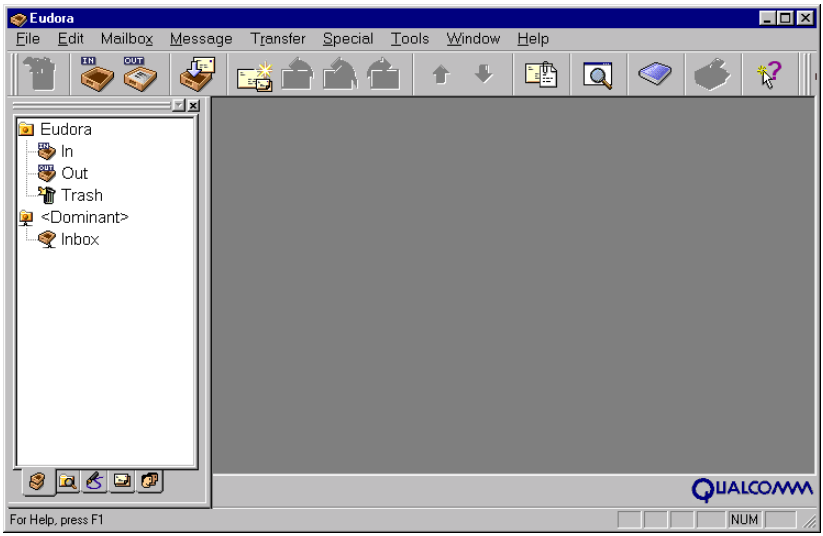
8 Choose the IMAP server type.

9 Click Next. On the IMAP Location Prefix page, ensure that the Location Prefix box is blank.

10 Click Next. On the Outgoing E-mail Server page, verify that the Outgoing Server box contains the FQDN of the CallPilot server.

11 Click Next. On the Success page, click Finish. Eudora prompts you for your CallPilot password.

12 Type your CallPilot password, and then click OK. Eudora connects to your CallPilot mailbox. When the connection is made, Eudora opens.




13 Choose Tools>Options. The Options dialog box appears.

14 In the Category list, select Checking Mail.

15 In the Check for Mail every...minutes box, specify how often you want Eudora to check for new messages. Eudora does not provide immediate

notification of new messages, so specify a low value to provide more frequent message checking. A value of 0 means the user will check for new messages manually.

**16** In the Category list, select Attachments.

**17** In the Encoding method section, choose MIME.

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

## To configure text formatting

**1** Choose Tools>Options. The Options dialog box appears.

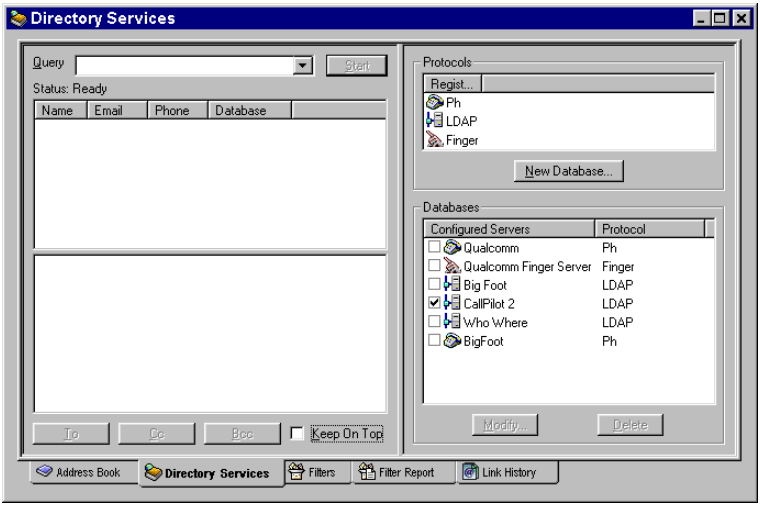
**2** In the Category list, select Styled Text.

**3** Select Send plain text only.

**4** Click OK.

## To configure access to the CallPilot Address Book

**1** Choose Tools>Directory Services. The Directory Services window appears.



2 In the Protocols section, select LDAP, and then click New Database. The Modify Database dialog box appears.


3 On the Network tab, type a descriptive name for the CallPilot Address Book in the first box.

4 In the Host Name box, type the LDAP server FQDN. Usually, this is the same name as the CallPilot FQDN.

5 If the CallPilot Address Book requires you to log on, check the “This server requires me to log on” box.

- Type your mailbox number and password in the Account name and Password boxes (If you are using Outlook Express 6, click Next to fill in these boxes). The User name for LDAP logon uses the following format:

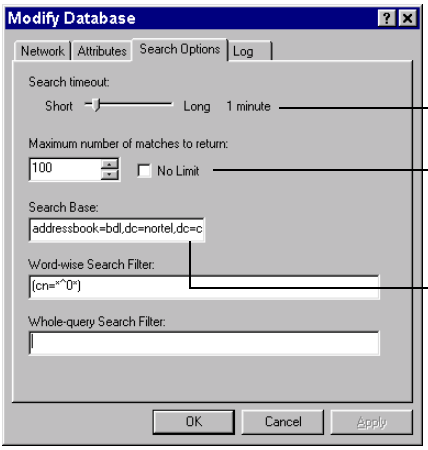
  *mail=<SMTP/VPIM prefix><mailbox number>@<local CallPilot server>,<Search base>*

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

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

6 Click the Search Options tab.

**7** Specify the required options.




If your network is slow, increase the time-out value.

Type the maximum number of entries to return for a search.

Type the LDAP search base in the appropriate format. For details, see “Connecting to the CallPilot Address Book” on page 44.

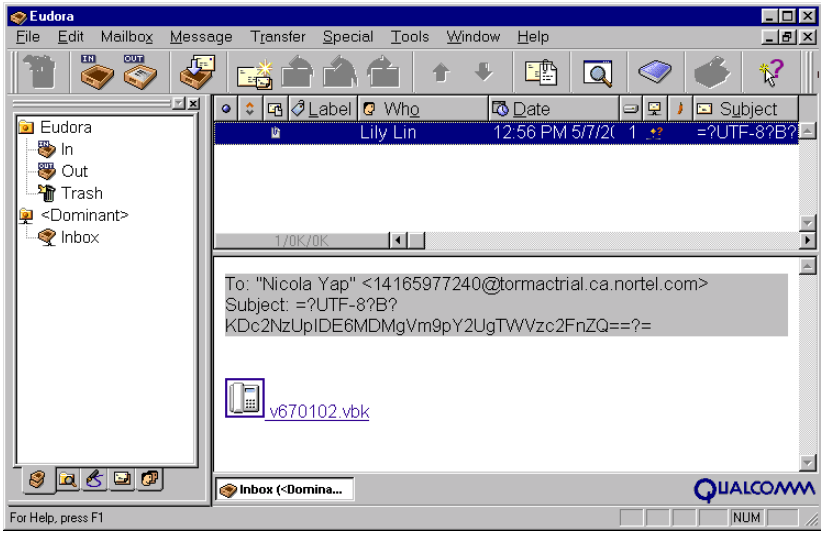
**8** Click OK. The selected CallPilot directory service should now appear in the Configured Servers list.

## To test your Desktop Messaging account

**1** Exit and restart your Internet mail client to ensure that your new settings take effect.

**2** Use your telephone to log on to your CallPilot mailbox.

**3** Compose a test voice message and send it to yourself. The message appears in your CallPilot Inbox.




## Configuring SSL encryption

By default, Eudora is configured to use Secure Socket Layer (SSL) encryption if it is supported by the server. However, Eudora does not connect to the CallPilot server using SSL until you specify that the CallPilot SSL certificate is trusted.

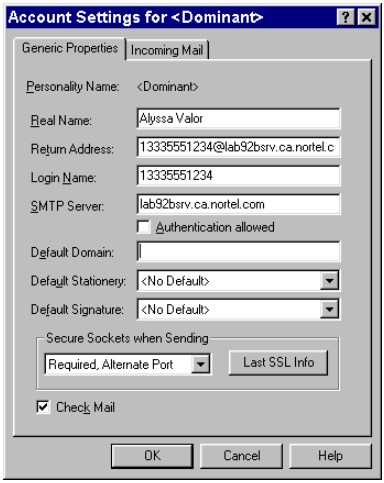
**Notes:**

- To use SSL with CallPilot, SSL must be enabled in both Eudora and on the CallPilot server.
- Before you enable SSL for your CallPilot mailbox, follow the instructions on pages 68 to 73 to properly configure and test your CallPilot mailbox and ensure that it is working correctly.

### To enable SSL encryption

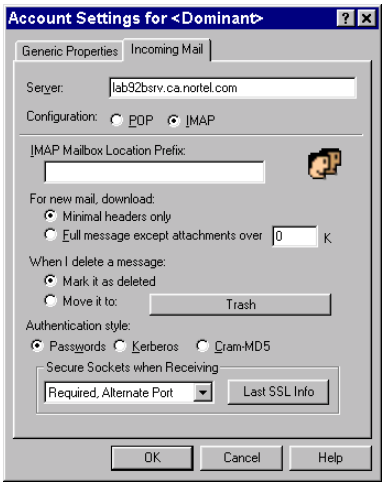
**4** Right-click the personality for your CallPilot mailbox, and then choose Properties. The Account Settings dialog box appears.

**5** Click the Generic Properties tab.




**6** In the Secure Sockets when Sending section, select Required, Alternate Port.

**7** Click the Incoming Mail tab.




**8** In the Secure Sockets when Sending section, select Required, Alternate Port.

**9** Click OK.

**10** Exit Eudora, and then restart Eudora.

**11** Check for messages in your CallPilot mailbox.

Eudora fails to connect to the CallPilot server, but it obtains the SSL certificate information for CallPilot server when it attempts to connect. This process may take a few minutes.

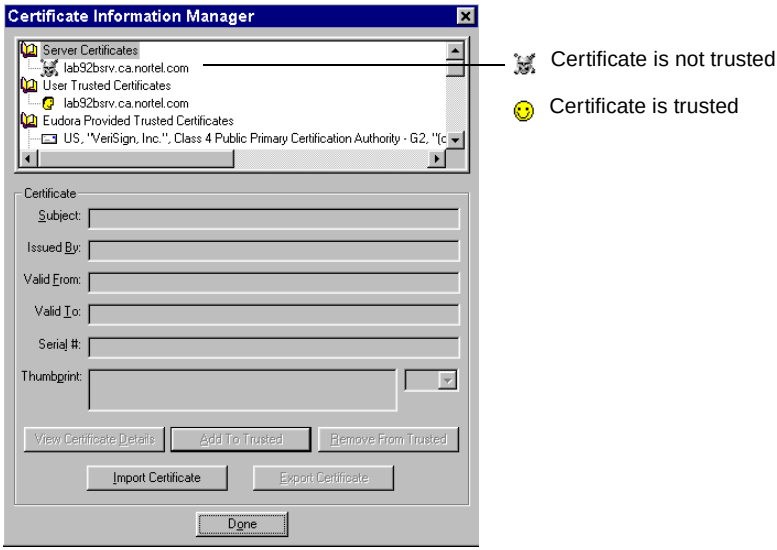
**12** In the Personalities list, right-click the personality for your CallPilot mailbox, and then choose Properties.

**13** Click the Incoming Mail tab.

**14** In the Secure Sockets when Sending section, click Last SSL Info. The Eudora SSL Certificate Information Manager dialog box appears.

In the Notes section, a message explains that the CallPilot server SSL certificate is not trusted.

**15** Click Certificate Information Manager. The Certificate Information Manager dialog box appears. A skull and crossbones icon appears next to the CallPilot server certificate to show that it is currently not trusted.




**16** In the Server Certificates list, select the certificate for the CallPilot server, and then click Add to Trusted.

**17** Click Done, and then close the remaining dialog boxes.

**18** Exit Eudora, and then restart Eudora.

**19** Check for messages in your CallPilot mailbox. Eudora should successfully connect to your mailbox using SSL.

If you want to confirm that the CallPilot SSL certificate is trusted, open the Certificate Information Manager dialog box and verify that the ☺ icon appears next to the CallPilot server certificate.

# Section D: Configuring Citrix Thin Clients

## In this In this section:

# Configuration overview

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

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

Once CallPilot Desktop Messaging has been configured, using CallPilot in a Citrix Thin Client environment is nearly identical to using it in a Standard Desktop Client environment. This includes the ability to change configuration options such as the SMTP/VPIM prefix and CallPilot server name.

One of the few limitations of the Citrix Thin Client environment is the inability to adjust the client's speaker volume and microphone level. Adjusting these settings only affects the Windows Terminal Server. Therefore, the speaker volume and microphone level controls are disabled in the CallPilot Audio Player, CallPilot Form, and CallPilot Configuration.

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

# Configuring Microsoft Outlook

Once the administrator had installed CallPilot Desktop Messaging on the Windows Terminal Server (refer to the Desktop Messaging and MyCallPilot Installation Guide), each Citrix Thin Client user must add CallPilot Desktop Messaging to their client computer's mail profile.

## Automatic Configuration

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

Note however that the automatic Outlook configuration is only available once the Windows Terminal Server administrator has published the Window's desktop. Otherwise, all users must manually configure Outlook.

## Manual Outlook XP Configuration

The user can manually add CallPilot Desktop Messaging to any e-mail profile in Outlook XP.

To manually configure CallPilot Desktop Messaging for Outlook XP:

1. Right click on the Outlook icon and click **Properties**.
2. In the Mail Setup dialog box, click **E-mail Accounts** to add CallPilot to the current e-mail profile, or click **Show Profiles** to choose another profile.

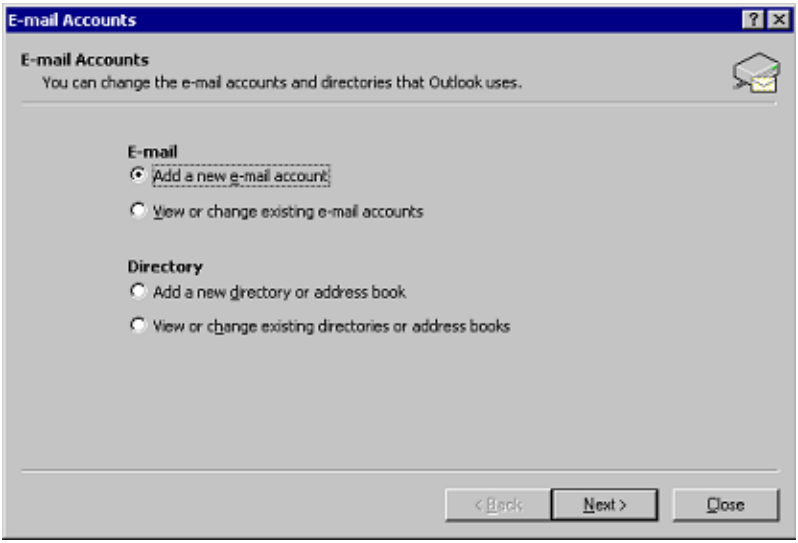
   If you click Show Profiles, then:

   **a.** Select the profile you wish to use.

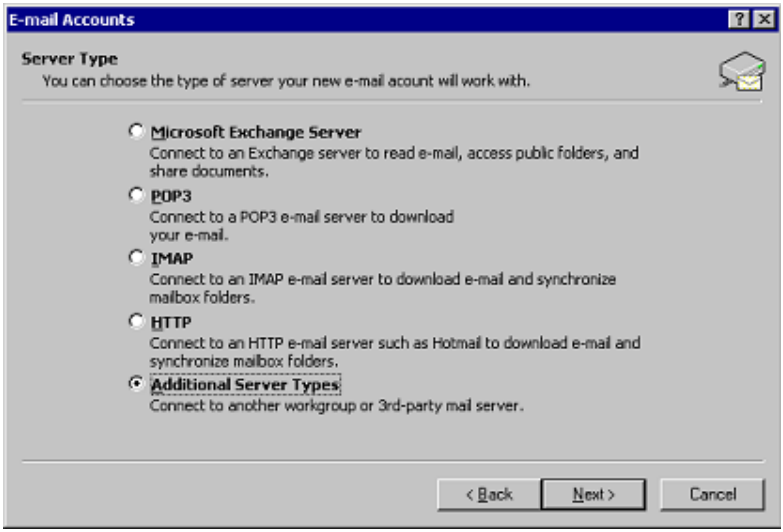
   **b.** Click **Properties**.

   **c.** Click **E-mail Accounts**.

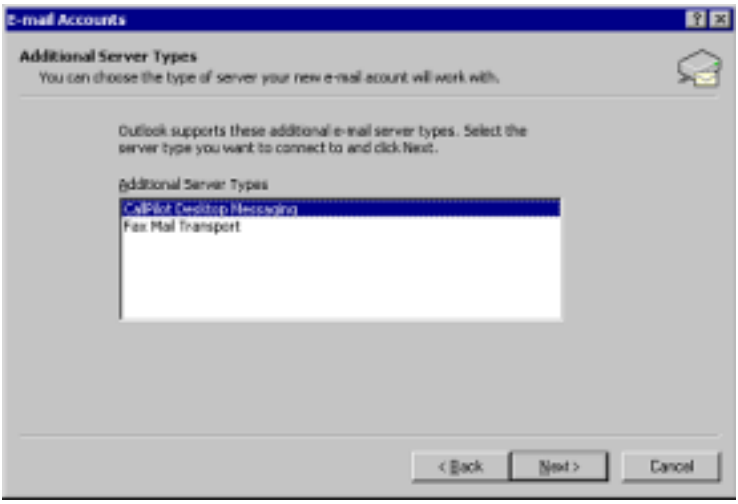
**3** In the E-mail Accounts dialog box, select **Add a new e-mail account** and click **Next**.



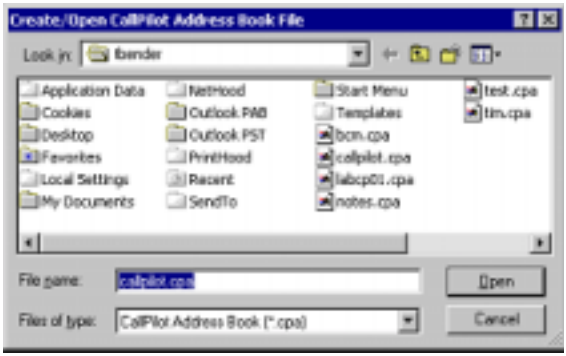

**4** Select **Additional Server Types** and click **Next**.



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




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



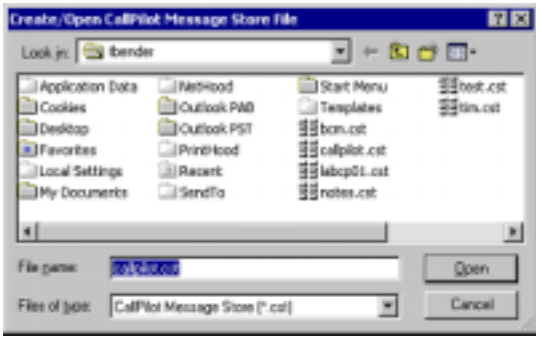

The default location in the Create/Open Address Book File window will be set to the user's profile section on the Windows Terminal Server. This prevents one user from inadvertently accessing or overwriting another user's files.

Nortel Networks does not recommend changing the default location of the Address Book file. If the user changes the location of the Address Book file, it may conflict with another user. This can inadvertently cause cached messages downloaded by one user to be viewable or playable by another user.

Initially, it may seem worthwhile to change the location of the Address Book File to a common location shared by all users. The system administrator could then maintain one copy of the Address Book shared by all users. However, a shared address book may contain entries (SDL's, BDL's, or PDL's) not applicable to all users. While the CallPilot Server prevents unauthorized use of Address Book entries, sharing the address book file among multiple users may cause confusion.

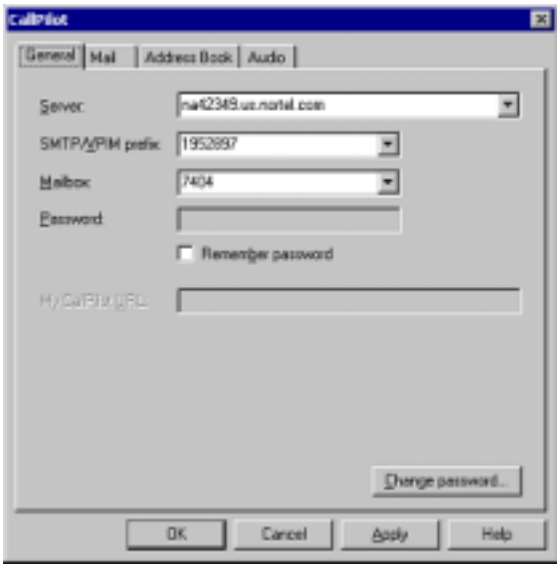
Since the address book files for all users are stored on the same computer, users need to be aware of how secure their data is. The level of security depends upon how the Windows Terminal Server has been configured by the system administrator. Refer to the “Other Windows Terminal Server considerations” section on page 91 for more information.

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




Nortel Networks does not recommend changing the default location of the Message Store file. If the user changes the location of the Message Store file, it may conflict with another user. This can inadvertently cause cached messages downloaded by one user to be viewable or playable by another user.

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




**9** Logon to the CallPilot Server (if prompted).

**10** Download the CallPilot Address Book (if prompted).


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

**11** Close any remaining windows to complete the configuration.

## Manual Outlook 2000 Configuration

The user can manually add CallPilot Desktop Messaging to any e-mail profile in Outlook 2000.

To manually configure CallPilot Desktop Messaging for Outlook 2000:

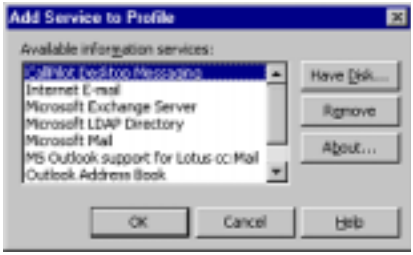
1. Right click on the Outlook icon and click **Properties**.
2. Click **Add...** to add CallPilot to the current e-mail profile, or click **Show Profiles…** to choose another profile.

   If you click **Show Profiles…**, then:

   **a.** Select the profile you wish to use.

   **b.** Click **Properties**.

   **c.** Click **Add**.
3. In the Add Service to Profile dialog box, Select **CallPilot Desktop Messaging** and click **OK**.



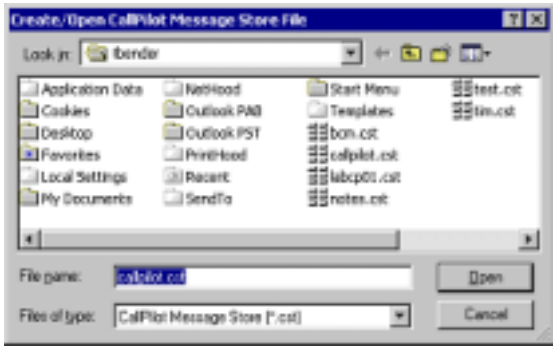

4. Click **Open** in the **Create/Open CallPilot Address Book File** window.


The default location in the Create/Open Address Book File window will be set to the user's profile section on the Windows Terminal Server. This prevents one user from inadvertently accessing or overwriting another user's files.

Nortel Networks does not recommend changing the default location of the Address Book file. If the user changes the location of the Address Book file, it may conflict with another user. This can inadvertently cause cached messages downloaded by one user to be viewable or playable by another user.

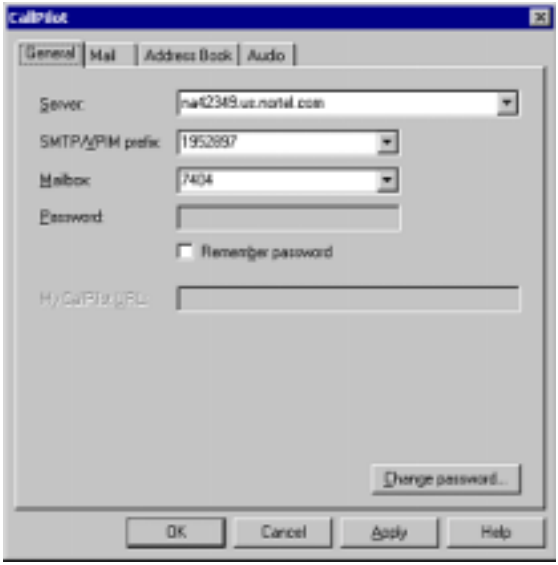
Since the address book files for all users are stored on the same computer, users need to be aware of how secure their data is. The level of security depends upon how the Windows Terminal Server has been configured by the system administrator. Refer to “Other Windows Terminal Server considerations” section on page 91 for more information.

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




Nortel Networks does not recommend changing the default location of the Message Store file. If the user changes the location of the Message Store file, it may conflict with another user. This can inadvertently cause cached messages downloaded by one user to be viewable or playable by another user.

**6** Enter your CallPilot Mailbox Number in the **Mailbox** field and click **OK**.




**7** Close any remaining windows to complete the configuration.

# Configuring Lotus Notes

The administrator must install CallPilot Desktop Messaging on the Windows Terminal Server and update the mail databases on the Domino server (refer to the Desktop Messaging and MyCallPilot Installation Guide). Once this is done, Citrix Thin Client users can run the CallPilot-enabled Lotus Notes client.

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

# Configuring Novell GroupWise

The administrator must first install CallPilot Desktop Messaging on the Windows Terminal Server (refer to the Desktop Messaging and MyCallPilot Installation Guide). Once this is done, each Citrix Thin Client user must add CallPilot Desktop Messaging to their client computer's Novell Default Settings mail profile.

## Automatic Configuration

Users can automatically add CallPilot Desktop Messaging to their Novell Default Settings mail profile by choosing **Start->Programs->Nortel Networks CallPilot Desktop Messaging->Add CallPilot to Novell GroupWise**.

Note however that the automatic Novell GroupWise configuration is only available when the Windows Terminal Server administrator has published the Window's desktop. Otherwise, all users must manually configure Novell GroupWise.

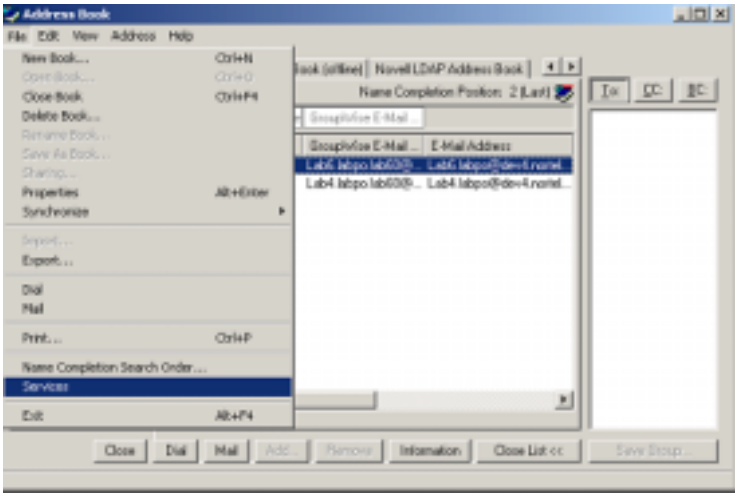
## Manual Configuration

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

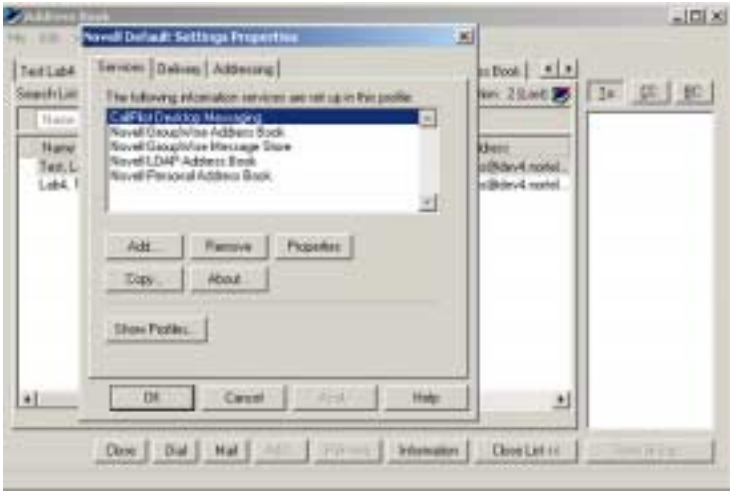
To manually configure CallPilot:

1. Log on to Novell GroupWise.
2. Open the address book.

**3** Choose **File->Services**.




**4** Once the Novell Default Settings Properties window appears, follow the steps in the section Manual Outlook 2000 Configuration on page 83 to configure the CallPilot Desktop Messaging service, even if Outlook XP is installed on the computer.




**5** Once configuration is complete, close and restart GroupWise.

# Configuring Internet Mail Clients and My CallPilot Users

## Configuring Internet Mail Clients

The administrator must install CallPilot Desktop Messaging on the Windows Terminal Server (refer to the Desktop Messaging and MyCallPilot Installation Guide). Once this is done, Internet Mail Clients can follow the same instructions for using CallPilot as standard Windows environment users.

## Configuring My CallPilot Users

The administrator must install CallPilot Desktop Messaging on the Windows Terminal Server (refer to the Desktop Messaging and MyCallPilot Installation Guide). Once this is done, My CallPilot users can follow the same instructions for using CallPilot as standard Windows environment users.

**Note:** Macintosh users of My CallPilot are not supported.

# Other Windows Terminal Server considerations

## Security

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

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

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

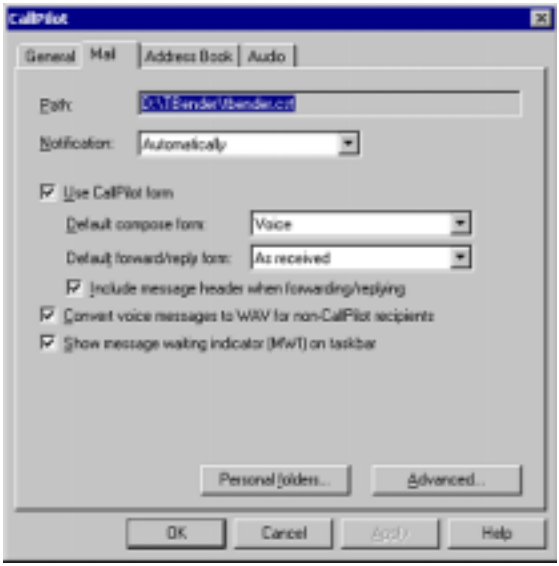
### Password Protect CST Files

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

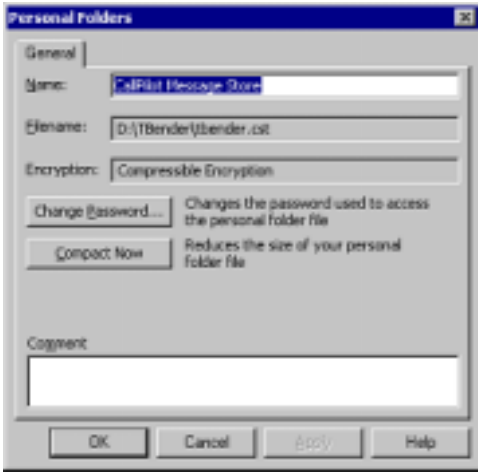
To prevent unauthorized access, users can password protect their CST files. This ensures no one (including the system administrator) can access previously played or viewed messages without first entering the user-defined password.

To password protect a CST file:

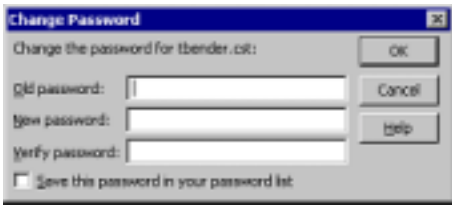
**1** Open CallPilot Configuration and select the **Mail** tab.




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



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




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

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

### Playing messages via the telephone

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

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

# Chapter 3

# Additional server configuration

## In this chapter

# Accessing a 3rd party Address Book from a separate server

## Overview

CallPilot 2.5 enables you to access a third-party LDAP server for message addressing.

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

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

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

# My CallPilot web server security

## Overview

My CallPilot operates using Internet protocols and may have limitations imposed on it by your company's network security policies. It does not attempt to circumvent any firewall or other network security software installed on top of TCP/IP.

You should consider the following security measures for My CallPilot:

- secure network configuration
- authenticated access to the My CallPilot web server
- port hiding

You should discuss these security measures with your IS administrator.

**CAUTION**

**Risk of incorrect operation**

Use caution when installing and configuring e-mail or file filtering software on the My CallPilot web server. Filtering software must allow IMAP and HTTP uploads and downloads of the MIME types allowed by the external e-mail servers that you make accessible to My CallPilot. The .exe file extension must also be allowed for HTTP downloads, so that the CallPilot Player installer can be downloaded.

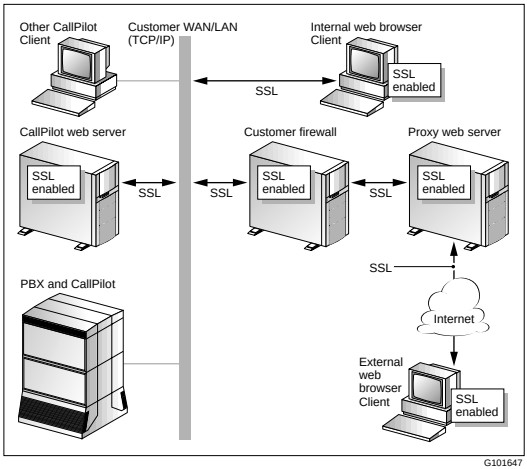
## Recommended configuration for external Internet access

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

**CAUTION**

**Risk of system corruption or data loss**

Nortel Networks strongly recommends that you obtain an independent security audit before you provide external access to your system based on the recommended configuration.




## Notes on the recommended configuration

The recommended solution requires

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

For details about enabling SSL, see “Securing communication with the web server” on page 99.

- SSL is only used for communication between the My CallPilot web server and the web clients. All communication between the My CallPilot web server and the CallPilot server is unencrypted. Note that the LDAP, IMAP and STMP connections can also use SSL, if those servers support it.
- configuration of the firewall to allow HTTP connections between the internal CallPilot web server and the external web server proxy

## Securing communication with the web server

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

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

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

### Enabling SSL

To enable SSL on the My CallPilot web server, you must purchase and install an IIS authentication certificate on the server.

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

Once you have installed a certificate, use the My CallPilot Server Administration Utility to enable SSL on the web server. For more information about this tool, see “My CallPilot Administration Utility” on page 102.

Once SSL is enabled on the web server, the user can choose to log on to My CallPilot with SSL enabled. If the user chooses a secure logon, My CallPilot uses the HTTPS protocol to secure communications.

**Note:** When a when a user logs into MyCallPilot with SSL, the online PDF documentation will not be accessible. This is a Microsoft Security issue. In Internet Explorer, click the Tools\Internet Options\Advanced tab. In the Security section, select the "Do not save encrypted pages to disk" checkbox.

### Port hiding

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

### LDAP SSL Support

If the SSL checkbox is selected in the LDAP settings in the My CallPilot Administration utility, My CallPilot will automatically download an SSL certificate from the CallPilot server and install it. My CallPilot will then use SSL whenever communicating with LDAP protocol to that server.

This certificate is separate and different from the IIS (HTTP) SSL certificate.

### Using My CallPilot with a firewall

In order to access the My CallPilot server through a firewall, the ports used by My CallPilot must be opened. The following ports are used by My CallPilot:

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

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

If the firewall is between the CallPilot server and the My CallPilot server, then these ports need to be open: FTP, IMAP, SMTP and LDAP.

# My CallPilot Administration Utility

## Overview

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

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

- the CallPilot server FQDN
- the SMTP/VPIM prefix
- the LDAP search base
- the LDAP port number

### To start the My CallPilot Administration Utility

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

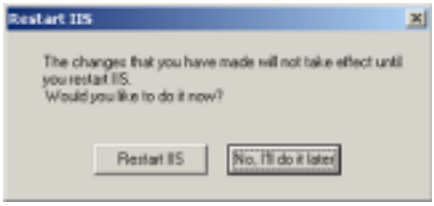
For details about the any of the available options, click the Help button.

## My CallPilot Voice Block

One of the new features in CallPilot 2.5 is the My CallPilot Voice Block. This feature provides the ability for the system administrator to control the distribution of CallPilot voice messages outside of the organization. It is intended for use only by the system administrator. The end user will not be able to enable or disable this feature.

To enable My CallPilot Voice Blocking:

1. Click on the *Security settings* tab in the *My CallPilot Administration Utility* to access the control for this feature.
2. Select the *Block saving or forwarding voice messages to non-CallPilot recipients* checkbox.
3. Once the system administrator saves the changes, the Setup utility will prompt to restart the Internet Information Services (IIS).




Doing so enables voice blocking immediately, otherwise the feature will take effect the next time a user logs on to My CallPilot. The system administrator can restart IIS using either the Restart IIS dialog box (above) or from the IIS Manager screen.

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

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

Note also that this feature does not block the user from forwarding voice messages to an external e-mail account if they are using Internet IMAP clients (Outlook Express, Eudora, or Netscape Messenger).

For information how to block voice messages in integrated Desktop Messaging clients (Outlook\Exchange, GroupWise or Lotus Notes) refer to the *Using the IniSetup Wizard* section in the *Desktop Messaging and My CallPilot Installation Guide*.

# Chapter 4

# Troubleshooting

## In this chapter

# Troubleshooting overview

## Introduction

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

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

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

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

# Section A: Desktop Messaging issues

## In this section

# Overview

## Introduction

This section provides information about troubleshooting Desktop Messaging problems. It is divided into five areas. The General issues area describes problems that can occur with any Desktop Messaging client. The other areas focus on problems specific to a Desktop Messaging client.

Desktop Messaging also includes several tools to assist you with troubleshooting. For more information, see “Desktop Messaging tools” on page 131.

## Messaging server compatibility

CallPilot 2.5 Desktop Messaging clients work with CallPilot 2.0 and CallPilot 2.5 servers. The availability of some features depends on the messaging server you use. For more information, see “Messaging server compatibility” on page 19.

# General issues

## Before you install

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

- the CallPilot mailbox number
- the SMTP/VPIM prefix of the CallPilot server
- the fully qualified domain name of the CallPilot server
- the search base for LDAP address searches in the CallPilot server

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

For a full description of Desktop Messaging requirements and procedures, you should refer to the *Desktop Messaging and My CallPilot Installation Guide*.

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

### To obtain the version number

1. If the user cannot log on, but you require the CallPilot version number, navigate to the following file:

   nmplayer.exe

2. Right-click the file, and then select Properties. The Properties page appears.
3. Select the Version tab. Version information for Desktop Messaging appears.

## Installing the Fax Printer driver - Windows 2000 SP4 issue

If a user attempts to install the Fax Printer driver and/or Fax Batch driver, the fax driver installation may fail after the user is prompted for the administrator name and password. This failure can occur for the folowing reasons:

1. The Client PC is running Windows 2000 with SP4 or later
2. The user performing the installation des not have administrator privileges.

### Solution

To resolve the problem, the system adminstrator must alter the security policy of the user performing the installation to include the user right “Impersonate a client after authentication”. Refer to Microsoft Knowledge Base article Q821546 for more information.

## General logon issues

**Symptom:** Error message about invalid credentials

The user gets a message similar to “Invalid credentials. Please retry...” or “The server could not be located. Please Retry... .”

### Solution

(from the user’s computer)

1. Verify that Desktop Messaging is configured with the correct information, including the following settings:
   - mailbox number
   - fully qualified domain name (FQDN) of the CallPilot server
   - the SMTP/VPIM prefix of the CallPilot server
   - the search base for address searches in the CallPilot directory
2. Verify that you can log on successfully from the telephone using the same mailbox number and password.
3. Verify that you have network connectivity to the CallPilot server.

   For example, issue a network command to the CallPilot server exactly as it appears in your Desktop Messaging configuration—try to ping using the DOS prompt—and ensure that you receive a valid response from the CallPilot server.

   From the Start menu on your Windows desktop, select the Command Prompt (typically found under the Programs/Accessories submenu). A new window appears with the DOS prompt “C:\”. From the DOS prompt, issue a ping command to the fully qualified domain name of the CallPilot server as follows:

   **ping <*CallPilot FQDN*>**

   If the response is “request timed out,” you do not have network connectivity to the CallPilot server. You will not be able to access Desktop Messaging.

## Solution

(administrator only)

**1** In CallPilot Manager, check the following:

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

**2** The CallPilot server name may not be on the DNS server.

From the Start menu on your Windows desktop, select the **Command Prompt** (typically found under the Programs/Accessories submenu). A new window appears with the DOS prompt "C:\". From the DOS prompt, issue a ping command to the CallPilot server IP address as follows:

**ping *<CallPilot server IP address>***

If the response is "request timed out," then issue a ping command to the fully qualified domain name of the CallPilot server. Type

**ping *<CallPilot FQDN>***

If you receive a ping response from the IP address but not the server name, then check the following:

If you have a DNS server

- Ensure that DNS is configured on the CallPilot server computer. Under TCP/IP properties, select the DNS tab. Ensure that a DNS server is listed. Verify the IP address for the DNS server.
- Check with the DNS administrator whether the server name is on the DNS server. Verify that the correct host name has been configured on the DNS server.

If you do not have a DNS server

- If you do not have a DNS server, you must set up domain name resolution using a HOSTS file, or configure CallPilot and Desktop

Messaging using the CLAN IP address only. For details about setting up a HOSTS file, see the CallPilot Manager online Help.

**Note:** Nortel Networks recommends that you set up DNS properly instead of asking Desktop Messaging users to update a host file.

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

**Symptom:** Error message about no Desktop Messaging capability

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

### Solution

As the CallPilot administrator, do the following:

1 Verify that Desktop Messaging is configured with the correct Mailbox number.

2 Verify that this mailbox is assigned to a mailbox class with Desktop capability enabled. For information about mailbox class capabilities, see the CallPilot Manager online Help.

**Symptom:** No entries in CallPilot address book

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

### Solution

As the administrator, do the following:

1 Check the CallPilot Address Book search base. Open the Desktop Messaging options dialog box, and then click the Address Book tab to view the search base.

2 Verify that the search base exactly matches the search base configured in CallPilot Manager.

## Other issues

**Symptom:** The user has message access problems

The user modified Desktop Messaging settings so that they are now correct, but the user still cannot access CallPilot messages.

### Solution

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

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

**Symptom:** Cannot send messages

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

### Solution

1. Ensure the user is addressing messages correctly. See the online Help for information about supported address formats.
2. Verify the capabilities enabled for the user's mailbox. Restrictions defined by the CallPilot administrator can prevent users from composing messages to these types of users.
   - Verify that the user has the capability to send messages to the required recipient (telephone, fax, AMIS users, or Networking users).
   - Verify that the restriction permission list (RPL) in the CallPilot system is configured to allow DTT and DTF network messages.
3. For DTT and DTF messages, ensure that you can dial the required number from a phone connected to the same switch as CallPilot.

4 For Networking, verify that networking is currently configured in CallPilot administration. For more information on networking, refer to the appropriate *Networking Implementation and Administration Guide*.

**Symptom:** Cannot send a CallPilot message

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

### Solution

Check the following on the user’s computer:

1 Verify that the CallPilot mailbox or the e-mail mailbox are not full. A user cannot send a CallPilot message if either of the mailboxes is full.

2 Check the format of the message address. The FQDN on the right side of the @ symbol must match the FQDN configured on the CallPilot server.

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

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

**ping <*CallPilot FQDN*>**

If the response is “request timed out,” then type

**ping <*CallPilot server IP address*>**

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

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

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

7 Verify that the CallPilot server is up and running.

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

**Symptom:** Cannot send faxes

### Solution

1 If the error message states that the message cannot be sent because part of the media cannot be converted, or because the media is not supported at the recipient's system, ensure that in messages you send with Desktop Messaging, you only send attachments that are TIFF-F, WAV, VBK, or text files.

2 Ensure that you, as the sender, and the recipients have the capability to send and receive fax messages. Ensure that all TIFF files are TIFF class F (TIFF-F) files created using the Nortel Fax Printer. Not all TIFF files are class F.

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

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

**Symptom:** Problems receiving faxes

People do not receive faxes sent by the user, or the user does not receive faxes that others are sending to him or her.

### Solution

- Verify that the mailbox class to which the user is assigned has the capability to send and receive faxes.
- Make sure that those to whom you send faxes have the capability to receive faxes.

**Symptom:** Problems receiving replies

Recipients receive CallPilot messages from the user, but the user does not receive any replies to his or her messages.

### Solution

1. Open the Desktop Messaging options dialog box.
2. Ensure that the SMTP/VPIM prefix is correct.

Ensure that if people are sending you faxes (TIFF-F files) in their replies, you have the fax capability enabled for your CallPilot mailbox.

**Symptom:** Cannot print text messages

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

### Solution

Users must have fax capability for their mailbox to print text messages from the telephone. A user who has Desktop Messaging capability but does not have fax capability cannot print text messages from the telephone.

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

**Symptom:** Voice message does not play on telephone

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

### Solution

1. When you answer the telephone, say something, such as “Hello,” to initiate message playback.
2. Check the CallPilot player status bar. If it states Open Pending, then hang up the telephone. Click Computer on the player, and then click telset playback. The phone rings again.
3. If the Status bar still says Open Pending, then click on Release telset button. Alternatively, you can hang up again, wait 3 to 5 minutes and attempt to play again. If this problem persists, contact your Nortel Networks Customer Technical Support.

# Microsoft Outlook issues

## Outlook 2002 issues

To ensure that Desktop Messaging works correctly with Microsoft Outlook, you should install the latest Outlook 2002 service pack. For information about the latest Office XP service pack, go to the Microsoft web site and search for article Q307841 in the Microsoft Knowledge Base. Also refer to article Q319820 for additional fixes to Outlook 2002.

**Symptom:** CallPilot messages stuck in Outbox

Messages that you send from the Nortel Fax printer driver, or using the Start menu command “Nortel Networks CallPilot Desktop Messaging > Send CallPilot Message” get stuck in the Outbox. Your Outlook profile is configured to deliver new messages to your Exchange Server mailbox rather than to a personal folder.

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

### Solution

Mircosoft has provided a solution that requires a change to the Windows registry. For details, go to the Microsoft web site and search for article Q319820 in the Microsoft Knowledge Base.

## Using Outlook

**Symptom:** Microsoft Outlook messages stuck in Outbox

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

### Solution

Remove the Exchange server, and then re-add it to the user's profile.

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

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

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

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

### Solution

Turn on the "Do not save encrypted pages to disk" option in Internet Explorer. To do so:

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

# Lotus Notes issues

## Installation issues

**Symptom:** Authorization error message in Lotus Notes

Error message: “No authorization to perform this operation.”

### Solution

A Lotus 5.x user must have Manager or Designer access control of the mail database to install Desktop Messaging for Lotus Notes. The Lotus Notes administrator sets this control on the server for each user. The default is Manager access. For Lotus 6.0, the user must have Manager rights.

If the user does not have Manager or Designer access, you have two options:

- Temporarily assign Manager or Designer access to the user.
- Manually update the Mail database from the server for each user who requires CallPilot access. This update creates a new folder, CallPilot Desktop Messaging, in Lotus Notes. For details about manual updates, see “Updating the Mail database design” on page 35.

### To determine the level of access control for a user

1. From the user’s Lotus Notes Mail database, choose File>Database>Access Control… .
2. Click the user’s name in the displayed list. The user’s access control level appears in the Access box.

**Symptom:** Lotus Notes option unavailable during Desktop Messaging installation

The Desktop Messaging installation program tries to detect Lotus Notes by searching for the notes.ini file on the hard drive. If the file is not found, the Lotus Notes option is disabled during installation.

### Solution

If your notes.ini file is located on a server, you can disable Lotus Notes detection to install Desktop Messaging for Lotus Notes.

To disable Lotus Notes detection, run setup.exe from the command line using the following command:

**setup.exe /ld**

## Other issues

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

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

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

- Groups (CallPilot)
- People (CallPilot)

**Notes:**

- In Lotus Notes versions 5.x and 6.0, these views are accessible only from the View menu.
- Lotus Notes 5.x and 6.0 users must log on to CallPilot before they can download the address book.

### Solution

1. Verify that you are in Folders and Views>CallPilot Desktop Messaging.
2. If you do not see CallPilot Desktop Messaging and you are in Folders and Views, uninstall the current version of Desktop Messaging, and then

reinstall it. During reinstallation, ensure that Update Lotus Notes databases is checked in the Ready to Install! window.

**Note:** Update Lotus Notes mail database and Update Loyus Notes Personal Address Book options are checked by default. If you uncheck these options, the Lotus Notes admininstrator has to update your mail database on the server to enable Desktop messaging and you will not be able to use your Personal Address Book for storing/accessing CallPilot address information. You also have an option (not recommended) to replace the Mail database design manually. A manual update should only be performed under special circumstances. For more information, see “Updating the Mail database design” on page 35.

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

While in the Personal Name and Address Book window, the user selects People (CallPilot). There are no entries in the CallPilot Address Book.

### Solution

You must download the CallPilot Address Book manually.

### To manually download the CallPilot Address Book

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

**Symptom:** DLL error message in Lotus Notes

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

### Solution

1. On the Windows desktop, right-click the Lotus Notes icon, select Properties, and then click the Shortcut tab.
2. Examine the properties of your Lotus Notes shortcut.

3 Verify the path in the “Start in” box.

**Note:** Usually, when Lotus Notes creates a shortcut, it puts a working directory in this box.

4 Add or update the path.

# Novell GroupWise issues

## Installation issues

**Symptom:** GroupWise option unavailable during Desktop Messaging installation

GroupWise 6.x requires Windows Messaging on your computer. Normally, Windows Messaging is installed with Windows.

### Solution

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

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

You should choose option 1, even if Windows Messaging is installed. This ensures that the GroupWise option is available during Desktop Messaging installation.

## Other issues

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

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

### Solution

Groupwise does not resize buttons automatically based on the window size and there may be occasions when the buttons on the toolbar may not show up. This can be solved by setting your screen resolution appropriately so that the Compose New Message button appears on the toolbar. For example, set your screen resolution to 1280x1024.

# Internet mail client issues

## Introduction

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

## General issues

**Symptom:** Reply to message sent from Eudora is rejected on AMIS network

A reply to a message cannot be sent over an AMIS network. This is caused by autotext placed at the start of the message.

### Solution

(administrator only)

1. Open the Eudora.ini file using a text editor, such as Notepad.
2. Under the [Settings] statement, add these lines:

   **ReplyAllAttribution=**
   **ReplyAttribution=**

3. Click File>Save to save the settings.

## Desktop Messaging error codes

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

| Code | Error message |
|---|---|
| 6 | Your message did not reach some or all of the intended recipients. |
| 16 | The message was not delivered because an undefined problem occurred. |

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

| Code | Error message |
|---|---|
| 31 | The recipient's system is not accepting messages. Please try sending this message again later. |
| 32 | Some features in the message are not supported. For example, you may not be able to send a message with this media. |
| 33 | Recipients are not able to receive messages with a private tag. Please try sending the message again without the private tag. |
| 35 | The system does not allow messages that are this large. |
| 36 | A problem occurred in the network. Please try sending the message again later. |
| 37 | An outgoing connection could not be made with the destination. Please try sending the message later. |
| 38 | A problem occurred during the transmission of your message. |
| 39 | A directory server was unavailable. Please try again later or contact your Administrator. |
| 40 | The network was congested or the telephone line was busy. Please try sending the message later. |
| 41 | The number of attempts to deliver the message has exceeded the system maximum. Please try sending the message again later. |
| 42 | An error occurred during the transmission of your message. |
| 43 | This message was addressed to too many recipients. Please reduce the number of recipients and try sending the message again. |
| 44 | There was a problem with the content of your message. Please recreate the message and send it again. |
| 45 | The message contains media that cannot be delivered. The recipient may not be able to receive a message with this media. |

| Code | Error message |
|---|---|
| 46 | The voice portion of the mixed media message was delivered. The recipient can only receive this part of the message. |
| 47 | The fax portion of the mixed media message was delivered. The recipient can only receive this part of the message. |
| 48 | Some media contained in your message was not converted successfully. Some of the recipients did not receive the message. |
| 49 | A security measure or policy prevented the delivery of the message. Please contact your Administrator. |
| 50 | The recipient(s) could not be reached. Please consult with your Administrator for assistance. |
| 51 | Legislative policy restricts the delivery of messages at this time. Consult with your Administrator on the best time to send the message. |
| 52 | The recipient(s) could not be reached. Please consult with your Administrator for assistance. |
| 92 | Invalid mailbox number/password. |
| 94 | User does not have desktop capability. Please contact your administrator. |
| 95 | Invalid mailbox number/password. Please contact your administrator. |
| 97 | Invalid mailbox number/password. Maximum number of invalid login attempts occurred. Please contact your administrator. |
| 98 | Invalid mailbox number/password. Maximum number of invalid login attempts in this session occurred. Please restart your login session. |
| 100 | Invalid login. Cannot access system resources. Try again later. |
| 101 | Too many login failures. |
| 102 | Too many authentication failures. |

| Code | Error message |
|---|---|
| 105 | Autologout; your session has been idle for too long. You are no longer connected to the server. Please log in again to send and receive new messages. |
| 107 | Mailbox error. |
| 108 | Your mailbox is almost full. |
| 110 | Your password has expired. Please change your password. |
| 111 | The temporary password assigned to you by the administrator must be changed. Please change your password. |
| 123 | The “Login” authentication method is disabled. Please contact your administrator. |
| 124 | The “Challenge-Response” authentication method is disabled. Please contact your administrator. |
| 125 | Your mailbox is full. Delete messages you no longer require. |
| 133 | Remote Notification was turned off by the person who answered the notification call. It has now been turned back on. |
| 134 | Remote Notification was turned off. It has now been turned back on. |
| 135 | Remote Notification has been turned off. Please ensure that the number is correct, and review your notification setup before turning notification back on. |
| 136 | Your password will expire in *n* day(s)<br>[where *n* is the number of days] |

# Section B: Desktop Messaging tools

## In this section

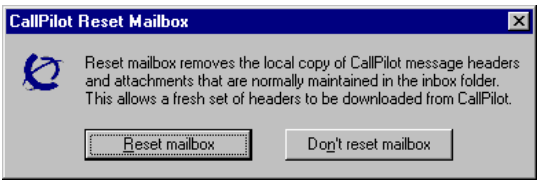
# Resetting the CallPilot message store

You can reset the CallPilot message store to remove invalid or corrupt messages from the inbox.

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

### To reset the CallPilot message store

1. Press and hold Ctrl+Shift.
2. Choose the appropriate command.
   - **Microsoft Outlook 98, 2000**—Choose Tools>Send/Receive>CallPilot Transport.
   - **Microsoft Outlook 2002**—Choose Tools>Send/Receive>CallPilot Desktop Messaging.
3. Continue to hold Ctrl+Shift until the CallPilot Reset Mailbox dialog box appears.




4. Click Reset mailbox.

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

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

# Replacing the mail database design in Lotus Notes

An administrator or user should only replace the mail database design if:

- the user wants CallPilot messages stored in the same Inbox as his or her Lotus Notes e-mail messages
- the user's database design has not been customized, and the user does not intend to customize the database design in the future
- the administrator or user is familiar with modifying Notes database design

**ATTENTION**

**Risk of data loss**

Replacement of the database design removes any customization in the current database design. If the mail database is customized, you should update the database instead of replacing it.

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

### To replace the database design from the user's computer

1. Log on to Lotus Notes on the user's workstation.
2. Make a note of the version of Lotus Notes. Choose Help>About Notes Desktop.
3. Select the mail database icon.
4. Choose File>Database>Replace Design. The Replace Database Design dialog box appears.
5. Select Local from Template Server list, and then click OK.
6. Check the Show advanced templates box.

7 Select CallPilot Mail (R5.0) or CallPilot Mail (R6.0) from the list. Your selection depends on which version of the Lotus Notes client you are running.

8 Make sure that

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

9 Click Replace.

10 Notes asks you to confirm that you want to change the database's view. Click Yes.

### To replace the database design (Notes server)

1 Install Desktop Messaging on the Lotus Notes server computer by running LNSERVER.EXE from the Desktop Messaging CD.

2 Start Lotus Notes.

3 Choose File>Database>Open.

4 Select the mail database icon.

5 Choose File>Database>Replace design. The Replace Database Design dialog box appears.

6 Check the Show advanced templates box.

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

8 Make sure that

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

9 Click Replace.

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

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

# CPTrace

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

Problems can include

- trouble connecting to the CallPilot server
- CallPilot player problems
- address book problems
- message compose, reply, forward, delete, notification

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

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

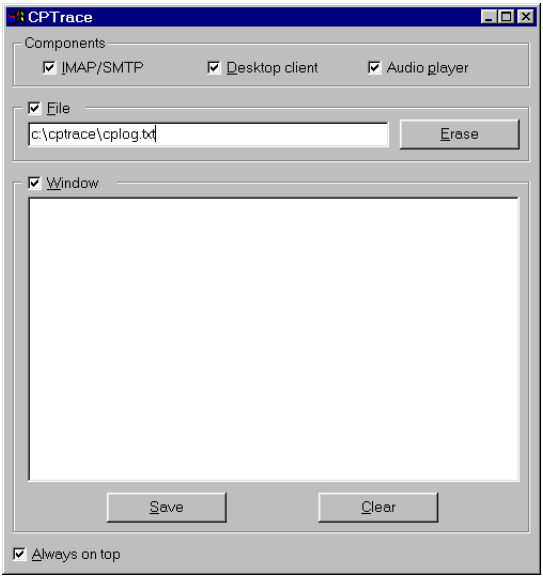
**CAUTION**

**Risk of impact to CallPilot**

CPTrace affects the way Desktop Messaging works. In rare instances, you may not be able to reproduce problems while CPTrace is running.

### To set CPTrace options

1 Double-click the CPTrace.exe file in the \Program Files\Nortel Networks\CallPilot directory. The CPTrace window appears.




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

| Option | Description |
|---|---|
| IMAP/SMTP | Log all IMAP/SMTP traffic. |
| Desktop client | Logs internal Outlook, Lotus Notes and GroupWise traffic. |
| Audio Player | Logs CallPilot Player traffic. |

| Option | Description |
|---|---|
| File | Writes log information to a file. Check this option and type a file name and extension. You can include a path in the file name, such as c:\cptrace.<br>When you close CPTrace with the File option checked, a dialog box appears prompting you to confirm that you want to continue file tracing. If you choose Yes, the Desktop Messaging client continues to write information to the specified file. This slows down the Desktop Messaging operation slightly.<br>The log file never gets larger than 1 Mbyte. When the file size reaches 1 Mbyte, 10 percent of the file is purged, starting with the oldest data. |
| Window | Writes log information to the display window. |
| Erase | Deletes the log file from the specified directory. |
| Clear | Clears the display window. |
| Save | Saves the trace to a text file. The default file name is CPTrace.txt, and is stored in a temporary directory. |
| Always on top | Check this box to keep the CPTrace tool on top of other windows. |

# MTest utility

MTest is a tool that you can use on any Windows computer to verify that a network connection (such as modem or LAN connection) can access a CallPilot mailbox. After the CallPilot server is installed, the system administrator or CallPilot installation technician can use MTest to verify that a user's computer can connect to the CallPilot server before installing Desktop Messaging.

You can also use MTest to debug Desktop Messaging problems. For example, if a Desktop Messaging user cannot log on to the mailbox, the administrator can use MTest to determine if the problem is with the Desktop Messaging software or with the network connection to the CallPilot server.

MTest allows you to verify the following:

- The user's computer can locate the CallPilot IMAP server using the host name or IP address provided by the CallPilot administrator.
- The user's mailbox is accessible using the mailbox number and password provided by the CallPilot administrator.

### To use MTest

1. Run Mtest from the client computer or from a network location accessible from the client computer. The Mtest file should be in the \Program Files\Nortel Networks\CallPilot directory. If not, you can find it on the Desktop Messaging CD. A new DOS window opens and Mtest starts.
2. At the `Personal name:` prompt, press Enter.
3. At the `Debug protocol (y/n)?` prompt, type **n**.
4. At the `Mailbox ('?' for help):` prompt, type **{*hostname*}**, where *hostname* is the FQDN or IP address of the CallPilot server.

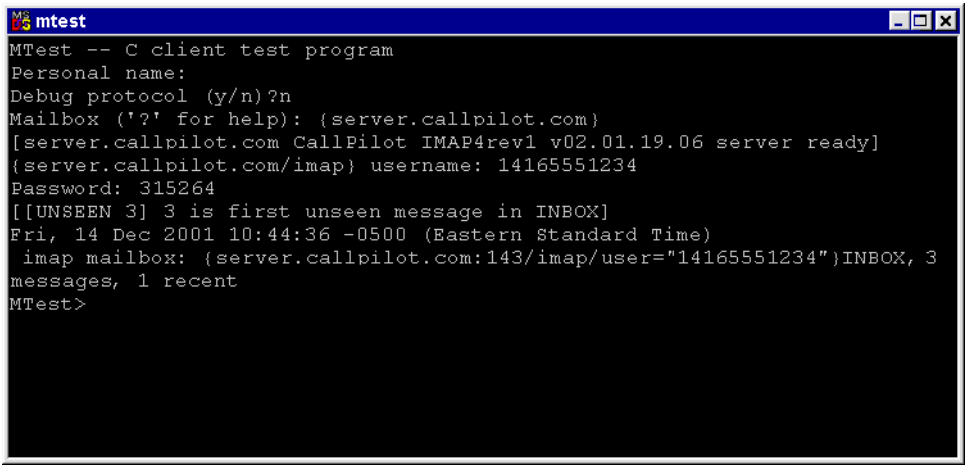
   If the connection is successful, the following message appears:

   `[`*`hostname`* `server ready]`

5 At the {*hostname*} username: prompt, type the user's SMTP/VPIM prefix and mailbox number as a single string of digits.

6 At the Password: prompt, type the user's mailbox password.

If MTest successfully logs on to the user's mailbox, it displays information about the number of messages in the mailbox. The image below shows an example of an Mtest session.




7 Close the DOS window when you are done.

# Section C: My CallPilot issues

## In this section

# Troubleshooting My CallPilot issues

## Introduction

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

**Symptom:** Web browser "times out", or an error message appears when you browse to the My CallPilot URL

The web browser times out, or one of the following error messages appears where the My CallPilot log on screen should appear:

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

### Solution:

(administrator only)

The web server (Internet Information Services) may have crashed or become unstable. Try restarting the IIS server. This can be easily accomplished as follows:

1. Launch the "My CallPilot Setup" tool (located in the Start Menu, under "Nortel Networks My CallPilot").
2. Type a space character at the end of the Server field, and then delete it. (This causes the "My CallPilot Setup" tool to interpret this as a configuration change even though no modification to the information has been made.)
3. Press "OK". Another dialog box appears.

**4** Press “Restart IIS” in this box.

If this does not fix the problem, try restarting the computer. If this is still not successful, then run the Web Trace tool (see below) to determine if My CallPilot is attempting to run. If it does not appear to run, then the problem may be one of the following:

- The “CallPilot” virtual directory was not created inside IIS (this can be checked by using the Microsoft Management Console or Internet Services Manager).
- The My CallPilot DLLs were not properly registered into the Windows environment. To reinstall these DLLs, find and launch the “registerDLLs.bat” file (typically located in the c:\Program Files\Nortel Networks\My CallPilot\bin\ directory). Note any errors that occur while the registration takes place.

**Symptom:** If the above does not resolve the symptom nor does restarting the computer.

### Solution:

(administrator only)

Run the “Web Trace” logging utility to troubleshoot internal My CallPilot problems. This program is useful for displaying debugging information that Nortel technical support personnel can use in determining what the problem may be. It can be found in the “bin” subdirectory of the “website” directory where My CallPilot is installed (typically c:\Program Files\Nortel Networks\My CallPilot\bin\webtrace.exe).

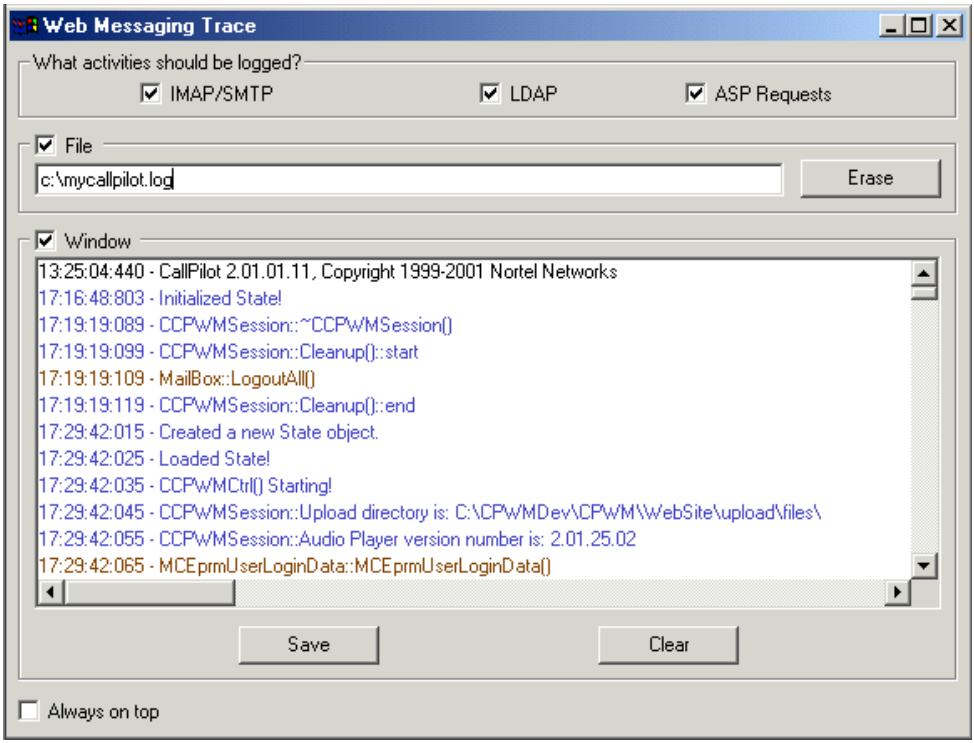
**Note:** If no data appears after the “Ready to go!” line when logging on to My CallPilot, then you must add the “IUSR_servername” user account to the “administrators” group. This can be done using the Windows NT 4 “User Manager”, or the Windows 2000 “Users and Passwords” control panel. This provides My CallPilot with the necessary Windows privileges to communicate with the “Web Trace” utility.

Use of this utility should be self-explanatory.

Note that you can enter a filename (eg. c:\mycallpilot.log) and check the File”box to enable logging to a text file. This file can then be sent to technical support personnel for analysis.

The Web Trace utility impacts My CallPilot by causing it to run somewhat slower. Therefore, do not leave the tool running unless you are debugging a problem.

The image below is an example of the Web Trace utility.



**Symptom:** Installation problems

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

### Solution

(administrator only)

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

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

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

   **b.** If the file is not properly registered, you can register it manually using regsvr32.exe, which is found in the Windows system directory.

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

   HKEY_LOCAL_MACHINE\SOFTWARE\Nortel\CallPilot\WebClient\IMAPServer

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

**Symptom:** Web server problems recorded in the Error Log

The IIS server reports serious problems in the WinNT Error Log.

### Solution

(administrator only)

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

**Symptom:** Logon problems

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

### Solution

(administrator only)

1. Verify that IMAP is enabled in CallPilot Manager.
2. Verify all items under Symptom: “Installation problems” on page 145.
3. Ensure that Desktop Messaging capability is enabled in the user’s CallPilot mailbox.
4. Check the Event Log on the web server.
5. Verify that the My CallPilot configuration is correct. This can be done using the My CallPilot Setup utility (located in the Start Menu, under Nortel Networks My CallPilot).
6. If logon problems are intermittent, and you are using Windows Advanced Server network load balancing, see Symptom: “Intermittent problems with logging on to My CallPilot” on page 147.
7. Isolate the possible source of the problem.
   - Try to log on using a Desktop Messaging client. If the Desktop Messaging client fails, then the problem is with CallPilot. If it succeeds, the problem is with My CallPilot.

- If you cannot log on from a Desktop Messaging client, try to log on from the telephone. If logon from the telephone is successful, the problem may be related to the CallPilot IMAP server.

  In this case, follow CallPilot troubleshooting procedures for IMAP/Desktop Messaging. For example, you may need to stop and restart the IMAP server on the CallPilot system using the Windows NT Service Control Panel.

  Make sure that Desktop Messaging is not in use by any CallPilot users. When you stop the IMAP service, it ends all Desktop Messaging sessions and requires users to log on again.

**8** If the CallPilot IMAP service is down and users try to log on, they do not receive a message telling them that the server is down. Instead, they receive the following message:

```
Login failed, please try again.
```

**Symptom:** Intermittent problems with logging on to My CallPilot

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

### Solution

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

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

## Symptom: Web browser problems

The web browser does not work properly.

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

The Quicktime and LiveAudio plug-ins are supported only in Netscape.

Netscape is often installed with its own plug-ins. My CallPilot may not be able to play voice messages or display fax messages if some of these plug-ins are installed.

### Solution

If you encounter problems, verify which plug-ins are installed. In Netscape, choose Help>About Plug-ins to view plug-in information.

Remove the plug-in that is causing the problem.

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

There are problems with playing or viewing messages.

Applications that are associated with a MIME type are those used to play or view data of the MIME type. Ensure that the application the user wants to use to play or view the data is the application that is associated with that data's MIME type.

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

**Note:** Internet Explorer uses the Windows file associations.

### Solution

1. To view and edit these associations, open Windows Explorer, and then choose View>Folder Options... . Click the File Types tab.
2. Netscape first checks its own associations. To view these associations, open Netscape, and then click Edit>Preferences...>Applications.

   **Note:** Users require version 6.01 or later of the Microsoft Media Player if they want to play voice messages in WAV format.

**Symptom:** Playing and viewing messages (Plug-ins)

There are problems with playing or viewing messages.

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

### Solution

1. To view and edit these associations, open Windows Explorer, and then choose View>Folder Options... . Click the File Types tab.
2. Netscape first checks its own associations. To view these associations, open Netscape, and then select Edit>Preferences...>Applications.

   **Note:** Users require version 6.01 or later of the Microsoft Media Player or CallPilot Player to play messages in WAV format.

**Symptom:** Access permissions

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

### Solution

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

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

1. Start IIS admin.
2. Select the web site that contains the My CallPilot virtual directory from the IIS tree view.

   **Note:** The default is Default web site.
3. Right-click the site, and then choose Properties>Directory security tab.
4. Under Anonymous Access and Authentication Control, click Edit.
5. Ensure that the Allow Anonymous Access check box is selected.
6. Select Edit to view the UserID.

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

If you suspect that there may be additional file permission problems, a procedure for checking this is described in the Microsoft Knowledge Base, article Q16133.

# Index

# F



# G



# H



# I



# L



# M

# N



# O



# P



# Q



# R



# S

# T



# U



# V



# W

# CallPilot

## Desktop Messaging and My CallPilot Administration Guide





| | |
|---|---|
| Publication number: | 555-7101-503 |
| Product release: | 2.5 |
| Document release: | Standard 1.0 |
| Date: | October 2003 |

NORTEL NETWORKS™