# CallPilot

Desktop Messaging and My CallPilot Installation Guide

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# Publication history

**May 2003**  Standard 1.0 issue of the *Desktop Messaging and My CallPilot Installation Guide* for CallPilot 2.02 with changes to the procedure for configuring IMAP and LDAP settings. The procedures about configuring the CallPilot server for desktop messaging and My CallPilot have been moved to this guide from the *General Release Bulletin*.

**September 2002**  Standard 1.0 issue of the *Desktop Messaging and My CallPilot Installation Guide* for CallPilot 2.0.

# Contents

# Section A:  Getting started

## In this section

# Product overview

## Introduction

This guide describes how to install desktop messaging and My CallPilot.

## Desktop messaging

*Desktop messaging* is a unified messaging application that works with an e-mail client to provide a single graphical interface for managing CallPilot voice, fax, and text messages, as well as e-mail messages.

## My CallPilot

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

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

## Providing access to user documentation

All user guides for CallPilot 2.02 are in Adobe PDF format only. When you install My CallPilot, mailbox owners can access the user guides from the Useful Information section of My CallPilot.

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

## More information

For additional information about desktop messaging and My CallPilot, refer to the following CallPilot documentation:

| For information about | Refer to the following sources: |
|---|---|
| ■ configure client software<br>■ configure servers after installation<br>■ troubleshoot desktop messaging and My CallPilot problems | *the Desktop Messaging and My CallPilot Administration Guide* (NTP 555-7101-503) |
| learn how to use desktop messaging and My CallPilot | ■ user documentation on the CallPilot documentation CD-ROM<br>■ desktop messaging online Help<br>■ My CallPilot online Help |

# 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.

**Note:** To order the documents that are available in printed format, contact your Nortel Networks sales representative.

## 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 following guides 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><br>This is a binder that contains the following five documents:<br><br>■ *Part 1: Installation and Maintenance Overview*<br><br>■ *Part 2: <Server model> Server Hardware Installation*<br><br>■ *Part 3: <Switch name> and CallPilot Server Configuration*<br><br>■ *Part 4: Software Installation and Maintenance*<br><br>■ *Part 5: <Server model> Server Maintenance and Diagnostics* | Refer to your binder for your 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* | 2.02 | 555-7101-507 |
| *Networking Planning Guide* | 2.02 | 555-7101-100 |
| *NMS Implementation and Administration Guide* | 2.02 | 555-7101-302 |
| *AMIS Networking Implementation and Administration Guide* | 2.02 | 555-7101-303 |
| *Enterprise Networking Implementation and Administration Guide* | 2.02 | 555-7101-304 |
| *Integrated AMIS Networking Implementation and Administration Guide* | 2.02 | 555-7101-305 |
| *VPIM Implementation and Administration Guide* | 2.02 | 555-7101-306 |

**Note:** The CallPilot networking guides remain mostly unchanged since CallPilot 1.0. For instructions on how to configure the networking services on CallPilot, refer to the CallPilot Manager online Help.

## End user guides

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

| Document titles |
| --- |
| *Unified Messaging What's New Card* |
| *Unified Messaging Quick Reference Card* |
| *Unified Messaging Wallet Card* |
| *Menu Interface Quick Reference Card* |
| *Alternate Command Interface Quick Reference Card* |
| *Command Comparison Cards* |
| *Multimedia Messaging User Guide* |
| *Speech Activated Messaging User Guide* |
| *Desktop Messaging User Guides* |
| *My CallPilot User Guide* |
| *E-mail Notification 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 and online Help topics in HTML format.

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

- Click the orange Help button at the top of any page to access the Administration Help area.
- Click the 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

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 get help with troubleshooting your system.

# Installation overview

## Installation process

Use the following diagrams with the Pre-Installation checklist on page 19 to help you prepare for desktop messaging and My CallPilot installation:



G101646
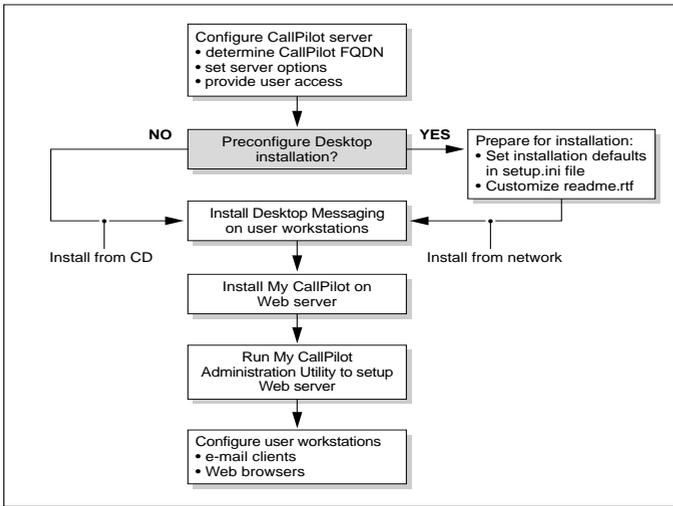
## Compatibility

Desktop messaging 2.02 works with CallPilot 2.02, CallPilot 2.0, CallPilot 1.07, CallPilot 150, and Business Communications Manager servers. Some CallPilot 2.02 features are only available with a CallPilot 2.02 server. For details about feature availability, refer to the *Desktop Messaging and My CallPilot Administration Guide* (NTP 555-7101-503).

# Pre-installation checklist

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

## Server settings for desktop messaging

**Method for resolving CallPilot FQDN**

❏ DNS ❏ HOSTS file ❏ CLAN IP only

CallPilot server FQDN _____          CLAN IP _____

**LDAP server settings**

❏ search base _____

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

**SMTP/VPIM prefix to use (PSTN recommended)**

_____

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

**My CallPilot URL**

_____

*Based on the web site name and virtual directory specified below*

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

## Additional server settings for My CallPilot

**IMAP e-mail servers available for telephone or web access to e-mail**
*Record the following information for each server you plan to use:*

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

**Web site name**

❑ Use default  ❑ Other

**Alias name of the virtual directory for My CallPilot**
*Obtain the alias name from the IS administrator.*

❑ Use default (CallPilot)  ❑ Other

## User Administration

**User access rights**

❑ Desktop messaging mailbox class is created with appropriate privileges.

❑ Desktop messaging Restriction Permission List is defined as required.

**Additional software requirements**

❑ Supported e-mail client is installed for desktop messaging.

❑ Supported web browser is installed for My CallPilot.

# Section B:   Configuring the CallPilot server

## In this section

# Configuring the CallPilot server for desktop messaging and My CallPilot

## Overview

The procedures in this section provide the steps that you must follow to enable a freshly installed or upgraded CallPilot system to function with desktop messaging and My CallPilot.  These procedures are as follows:

- To set the Voice Profile for Internet Mail (VPIM), Electronic Switched Network (ESN) and fully qualified domain name (FQDN)
- To set the Mailbox Class fields to enable all desktop messaging and My CallPilot features
- To fill the Useful information section of My CallPilot (this procedure is optional but strongly recommended)

You must be logged in to CallPilot Manager to be able to configure the CallPilot server for desktop messaging and My CallPilot.

## To set the VPIM, ESN and FQDN

1 In CallPilot Manager, choose Messaging → Message Network Configuration.

2 Select the server name (often identified as Untitled), and then click Show Details.

   **Result:** The Server Properties page appears.

3 Type the FQDN of the CallPilot server (for example, cpserver.mycompany.com)  in the FQDN server: field.

4 Click Save.

5 Click the + symbol that is next to the server name to expand the network tree in the Local Server Maintenance section and display the locations associated with the server name.

**6** Select the primary location name (often identified as Untitled) in the list of locations, and then click Show Details.

**7** Scroll to the ESN section and to the Access Codes subsection.

**8** Type an ESN access code (such as 6, 9, 1 and so on) in the ESN Access Code Used by this Location: field.

**9** Scroll to the Location Codes subsection and click Add.

**10** Enter the ESN location code (for example, 676) and then click OK.

**11** Scroll to the VPIM section and click Add.

**12** Enter the SMTP/VPIM prefix that you want (for example, the area code or the routing prefix) in the Prefix: field, and then click OK.

   **Note:** The SMTP/VPIM prefix can be any number.  This prefix is often set to the first 7 digits of the 11-digit telephone number; for example, 1612555, where 612 is the area code.

**13** Click Save.


## To set the Mailbox Class fields to enable all desktop messaging and My CallPilot features

**1** In CallPilot Manager, choose User → Mailbox Classes.

**2** Click the mailbox class that you want to configure (for example, the Regular User class).

**3** Scroll to the Outcalling (Delivery to Telephone or Delivery to Fax) section and, if necessary, select the Outcalling Capability and Remote Text Notification Capability check boxes.

   **Tip:** When selected, these check boxes enable the remote text notification sub-feature of the remote notification feature.

   **Note:** This configuration step is optional.

**4** Scroll to the Notification of Message Delivery section.  The Remote Notification Capability pop-up menu enables the remote notification feature.

   **Note:** This configuration step is optional.

**5** Scroll to the Keycode Features section and select the check boxes corresponding to the features that you want to enable:

- The Desktop and Web Messaging check box enables viewing and creating messages. You must select this check box to enable the desktop messaging application.

- The Mailbox Manager check box enables all the items in the Features section of My CallPilot. The Mailbox Manager check box is selected automatically if the Desktop and Web Messaging check box is selected.

- The Fax Capability check box enables the fax printing feature.

- The Email-by-Phone capability enables the e-mail by telephone feature.

**6** Click Save.

## To fill the Useful information section of My CallPilot

**1** In CallPilot Manager, choose Tools → My CallPilot Configuration.

**2** Type an administrator's notice in the Useful Information Message Text: text box. The notice apears each time a user logs in to the system.

**3** Type the appropriate telephone numbers in the Dialing Numbers Display section or click Detect All.

**4** Type the appropriate info in the Local Support Content section.

**5** Click Save.

## Conclusion

If you executed the previous procedures correctly, you configured the CallPilot server to function properly with desktop messaging and My CallPilot.

# Defining the CallPilot server FQDN

## Introduction

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

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

1. Determine the currently defined FQDN for the CallPilot server.

2. Determine the type of domain name resolution method your organization uses, and confirm that it is set up correctly.

3. Specify the CallPilot server FQDN in CallPilot Manager.

The following subsections describe these steps.

## To determine the CallPilot server FQDN

**1** On the CallPilot server, open the Windows Control Panel.

**2** Double-click Network.

   **Result:** The Network dialog box appears.

**3** Click the Protocols tab.

**4** Choose the TCP/IP component, and then click Properties.

   **Result:** The Microsoft TCP/IP Properties dialog box appears.

**5** Click the DNS Configuration tab.

**6** Record the host name and the domain name.

   When combined, the host name and the domain name form the FQDN.

   **Example:** The host name, "compass", and the domain name, "acme.com", combine to form the FQDN, "compass.acme.com".

**7** Click OK.

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

## Verifying domain name resolution

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

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

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

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

### Defining the CallPilot server FQDN in CallPilot Manager

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

### To define the CallPilot server FQDN

**1** In CallPilot Manager, choose Messaging → Message Network Configuration.

**2** In the Local Server Maintenance section, select the server name, and then click Show Details.

**Result:** The Server Properties page appears.

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

**Example:** cpserver.mycompany.com

**4** Click Save.

# Configuring messaging services

## Introduction

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

## Before you begin

As you configure the CallPilot server, complete the pre-installation checklist
on page 19 to help you prepare for desktop messaging installation.
Additional information is also available in the CallPilot Manager online
Help.

## Messaging protocols

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

- **IMAP server**—Internet Message Access Protocol (IMAP) enables
  desktop messaging clients to log on to CallPilot and retrieve messages.

- **LDAP server**—Lightweight Directory Access Protocol (LDAP) enables
  desktop messaging clients to access the CallPilot address book. You can
  use the CallPilot LDAP server or your existing LDAP server.

- **SMTP server**—Simple Mail Transfer Protocol (SMTP) enables desktop
  messaging clients to send messages.

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

## Additional server configuration

CallPilot 2.02 also enables you to access a third-party LDAP address book for use with desktop messaging. You can only use a third-party LDAP server if you are using a desktop messaging groupware client (Outlook, GroupWise, or Lotus Notes).

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

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

## Security options

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

- **Secure socket layer (SSL) encryption**—SSL encrypts data communication between two end points on a network. It is normally used in environments that require additional security (for example, accessing a mailbox using a public Internet service provider).

- **Challenge-Response authentication**—An authentication method that uses the MD5 algorithm to transmit the CallPilot mailbox number and password in an encoded format to the CallPilot server.

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

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

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

## To configure IMAP and LDAP settings

**1** In CallPilot Manager, choose Messaging → Internet Mail Clients.

**2** To allow clients to access LDAP with a high level of security, check the box Enable LDAP with SSL port. SSL for LDAP must also be enabled by the client if a high level of security is desired..

**3** To set up the LDAP search base:

   **a.** From CallPilot Manager Home select Configuration Wizard.

   **b.** Select Next from the Welcome page.

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

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

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

   For example dc=nortel, dc=ca

**4** In the IMAP section, check the Enable IMAP box to turn on IMAP service.

**5** Choose the required IMAP options.

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

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

   **Note:** If you enable SSL, ensure that you instruct users to enable SSL in the desktop messaging clients.

## To set SMTP options

**1** In CallPilot Manager, choose Messaging → Message Delivery Configuration.

**2** In the SMTP/VPIM section, check Incoming SMTP/VPIM to enable access to SMTP service from desktop messaging clients.

**3** Click Security Modes for SMTP sessions, and then specify the required security options.

**4** Click Save.

# Defining addressing prefixes

## Introduction

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

### VPIM network shortcut

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

You must define a VPIM network shortcut for all local and remote prime locations and all satellite locations to use desktop messaging and My CallPilot. In desktop messaging and My CallPilot applications, this type of VPIM shortcut is referred to as the *SMTP/VPIM prefix*.

### Open VPIM shortcut

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

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

## Setting the SMTP/VPIM prefix

Desktop messaging uses the SMTP/VPIM prefix to create a unique CallPilot address for each mailbox on the CallPilot system.

SMTP/VPIM   mailbox
prefix   number            CallPilot server FQDN

16138887002@voiceuser.callpilot.com

CallPilot user identifier
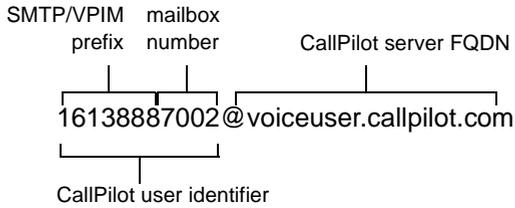
In a Network Message Service (NMS) system, the SMTP/VPIM prefix allows two different NMS sites to have the same mailbox number.

|  | **User A (Toronto)** | **User B (Richardson)** |
|---|---|---|
| **Mailbox** | 5833 | 5833 |
| **SMTP/VPIM prefix** | 1314442 | 1416338 |

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

## To add an SMTP/VPIM prefix

1  In CallPilot Manager, choose Messaging → Message Network Configuration.

2  In the Local Server Maintenance section, expand the network tree to display the locations associated with the local server.
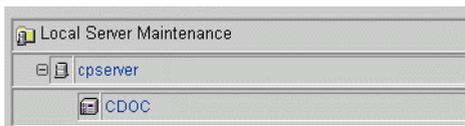


3  In the list of locations, select the prime location, and then click **Show Details**.

4  In the VPIM section, click **Add**.

**5** In the Prefix box, type the SMTP/VPIM prefix for the prime location, and then click **Save** to return to the Location Properties page.

**6** Click **Save**.

**7** If you are using NMS, configure an SMTP/VPIM prefix for each local and remote prime switch location, as well as all satellite switch locations.

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

# Section C:   Installing software

## In this section

# Desktop messaging requirements

## Servers

You must install CallPilot with a keycode that enables desktop messaging features. Desktop messaging works with CallPilot 1.07, 2.0 or 2.02 servers, Nortel Business Communications Manager 2.5 server, and Nortel CallPilot 150 server.

The CallPilot server must be configured with a minimum of Windows NT Service Pack 5 for Secure Socket Layer (SSL) to work.

## Desktop messaging client installation

**CAUTION**

**Risk of reduced system performance and security vulnerability**

Do not install desktop messaging clients on the CallPilot server. Nortel Networks does not support the use of desktop messaging clients on the CallPilot server because they

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

## Server configuration

Before you install desktop messaging, ensure that you have properly configured the CallPilot server. For details, see Section B: "Configuring the CallPilot server," on page 21.

## User workstation requirements

Users require the following software and hardware for desktop messaging:

- Windows 95 B, Windows 98 SE, Windows 2000 Professional, Windows NT 4 SP6a, Windows XP
- monitor with 256-color 800 x 600 capability
- 15 Mbytes of free disk space to install software
- sound card and speakers for playing messages on the computer
- microphone for recording messages from the computer
- for desktop messaging, a LAN (Ethernet) connection to the CallPilot server

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

## E-mail client requirements

Desktop messaging supports *groupware* e-mail clients that run with a corporate e-mail server and IMAP *Internet* e-mail clients. Refer to the CallPilot 2.02 General Release Bulletin for the most up-to-date list of supported clients.

Nortel Networks recommends that you install the latest service release (SR) update for your e-mail client. The table below indicates the recommended SR for proper functioning with desktop messaging:

| Groupware clients | Internet clients |
|---|---|
| ■ Microsoft Outlook 98 or 2000 (SR-2) in Corporate mode<br><br>■ Microsoft Outlook 2002 (SP-1)<br><br>■ Novell GroupWise 6.x<br><br>■ Lotus Notes 4.6 and 5.x | ■ Microsoft Outlook Express 5.0 or 6.x<br><br>■ Microsoft Outlook 98 or 2000 (SR-2) in Internet mail mode<br><br>■ Microsoft Outlook 2002 (SP-1)<br><br>■ Netscape Mail 6.2x<br><br>■ Qualcomm Eudora Email 5.x |

**Notes:**

■ **Outlook 2002 (Office XP client)**—For information about the latest Office XP service pack, go to the Microsoft web site and search for article Q307841 in the Microsoft Knowledge Base. Also refer to articles Q309491 and Q319820 for additional Outlook 2002 fixes.

To work correctly with CallPilot, you must also install the Microsoft fix to address a problem with the Outlook Protocol Manager. For information about the Microsoft fix, go to the Microsoft web site and search for article Q311744 in the Microsoft Knowledge Base.

■ **Outlook and GroupWise**—To use desktop messaging for GroupWise or Outlook, Windows Messaging 4.0 must be installed.

During GroupWise installation, the installation program checks for Windows Messaging. If it is not detected, the system asks if you want to install Windows Messaging. You should install the complete Windows Messaging system, even if Windows Messaging is already installed on the computer. This ensures that the GroupWise option is available during desktop messaging installation.

■ **Lotus Notes**—To install desktop messaging for Lotus Notes, you must have Manager or Designer control of the user's mail database. This control is set on the server by the Lotus Notes administrator.

- **fax messaging**—Imaging for Windows must be installed for viewing faxes. It is not required by CallPilot software.

    - Imaging for Windows is installed by default on Windows 95B, Windows 98, Windows NT, and Windows 2000 operating systems. Microsoft does not provide Imaging for Windows on Windows XP.

    - If you are installing desktop messaging on a Windows XP computer, you will be able to view fax files in the default XP fax viewer by double-clicking the fax item. Users will also be limited to creating one fax image at a time using the fax driver.

    - Imaging for Windows for Windows XP can be purchased from www.eistream.com.

# Installing desktop messaging

## Preparing for desktop messaging installation

Before you install desktop messaging, ensure that

- you have all the information you need in the pre-installation checklist
- user workstations have the required software for desktop messaging
  For more information, see "Desktop messaging requirements" on page 36.

## Upgrading desktop messaging

If you are upgrading from a previous version of desktop messaging, verify the currently installed version:

- **desktop messaging 1.06 or earlier**—You must uninstall the currently installed version before installing a newer version of desktop messaging.
- **desktop messaging 1.07 or later**—You can reinstall the same version or install a newer version of desktop messaging without removing the currently installed software.

### To uninstall desktop messaging (Windows XP)

1 In the Windows Control Panel, click Add or Remove Programs.

2 In the program list, select the desktop messaging client to remove.

3 Click Change/Remove.

   **Result:** The uninstallation program starts and the Welcome page appears.

4 Click Uninstall to begin the uninstallation process.

### To uninstall desktop messaging (previous versions of Windows)

**1** In the Windows Control Panel, double-click Add/Remove Programs.

**2** On the Install/Uninstall tab, select the CallPilot desktop messaging client to remove, and then click Add/Remove.

**3** Follow the prompts to remove desktop messaging.

## Running desktop messaging installation

You have two installation options for desktop messaging:

- **Customized installation**—To simplify installation, you can define installation defaults before you install desktop messaging on individual workstations.

- **Manual installation**—Install desktop messaging without setting installation defaults first. If you do not set installation defaults, you must specify all the required installation options each time you install desktop messaging on a workstation.

### Benefits of customized installation

If you set installation defaults, you only need to specify a few user-specific options during software installation. Since all other options are already predefined, you can let users install desktop messaging themselves from a network location. If you want users to perform the installation, customize the README.RTF file, located in the root directory of the CallPilot product CD-ROM, to reflect your CallPilot system. Place the file in a network location accessible to your users.

When you customize installation, you can make the default options read-only. If you make options read-only, the installation program automatically hides or disables options that you do not want to make available. This setting is useful when you want to

- ensure that all users install desktop messaging with the same options

- block access to specific options

For example, if fax messaging is not available to your desktop messaging users, you can disable the fax printer driver installation option, and then make settings read-only to prevent users from installing the driver.

### To customize installation

**1** Create a folder for the desktop messaging installation software in a network location that is accessible to all desktop messaging users.

**2** Copy the contents of the Desktop Messaging CD-ROM into the installation folder that you just created.

**3** In the installation folder, run inisetup.exe.

**Result:** The Setup initialization program starts.

**4** Click Next to continue the setup initialization procedure, and then follow the prompts.

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

**Result:** The Setup initialization program creates a file called setup.ini in the installation folder.

**5** If you want to prevent users from sending voice messages to external e-mail addresses, perform the following steps:

**a.** In the installation folder, open the customized setup.ini file in a text editor.

**b.** In the [Installation] section of the file, add the following line:

BV=TRUE

**c.** Save the file.

**Result:** Once the voice blocking setting is enabled, users cannot forward CallPilot voice messages to external e-mail addresses. In addition, users cannot save CallPilot voice messages they receive. This prevents them from attaching a saved voice message to an e-mail message or copying the voice message onto a disk. Users can still send voice messages to all supported CallPilot addresses.

### To install desktop messaging on user workstations

**1** Run setup.exe from the appropriate location (network folder or CD-ROM).

   ■ If you customized the installation program, run setup.exe from the network folder where you placed the installation software.

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

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

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

# My CallPilot requirements

## Servers

My CallPilot only works with a CallPilot 2.0 or 2.02 server. You can install My CallPilot on the CallPilot server or on a separate web server. For optimal performance, you should use a separate web server dedicated only to My CallPilot applications. If desired, you can install My CallPilot on the same stand-alone web server as CallPilot Manager and CallPilot Reporter.

You need approximately 25 Mbytes of disk space for My CallPilot. Nortel Networks recommends an additional 100 Mbytes after installation for temporary files.

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

My CallPilot requires Microsoft Internet Information Server (IIS) 4 with SP6a, or 5 with SP1 and SP2 to provide users with access to applications. If you are unfamiliar with the operation and administration of IIS, contact your IS administrator for assistance.

**CAUTION**

**Risk of system interruption or malfunction**

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

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

## Server configuration

The server configuration described in Section B: "Configuring the CallPilot server" is required for both desktop messaging and My CallPilot. Ensure that the CallPilot server is properly configured before you begin My CallPilot installation.

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

For information about assigning access to features and configuring the Useful Information section of My CallPilot, see Section D: "Controlling access to features," on page 51.

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

## User workstation requirements

My CallPilot requires the same hardware as desktop messaging. For more details, see "User workstation requirements" on page 37.

## Web browser requirements

My CallPilot supports the following web browsers:

- Microsoft Internet Explorer 5.x, 6.x
- Netscape 6.2x

Javascript and cookies must be enabled in the web browser.

**Note:** If you use Netscape 6 with My CallPilot, you need Java Runtime Environment (JRE) to view the online Help. When you install Netscape, the Default and Typical installation options do not include JRE. You can reinstall Netscape with the Full installation option, or obtain JRE from the Sun Microsystems web site.

### Additional software

Some My CallPilot features require additional software as follows:

| To | You need |
| --- | --- |
| Play voice messages | ■ CallPilot Player to play files in VBK format<br>■ Windows Media Player to play files in WAV format |
| Record voice messages | CallPilot Player or an audio editor that can record messages in WAV format |
| View fax messages | an image viewer that can display TIFF-F files |
| Create fax messages | Nortel Fax driver (included with desktop messaging) or an application that can create images in TIFF-F format |
| View online guides in PDF format | Adobe Acrobat Reader |

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

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

# Installing My CallPilot

## Preparing for My CallPilot installation

Before installing CallPilot web applications, ensure that

- you have all the information you need in the pre-installation checklist
- an operational version of IIS 4 or IIS 5 is installed on the server
- you have removed any previous versions of Web Messaging from the IIS server
- user workstations have the required software for My CallPilot
  For more information, see "My CallPilot requirements" on page 44.

## To uninstall Web Messaging

If an earlier version of Web Messaging is installed, you must uninstall it before installing My CallPilot.

1 Shut down the IIS web server service.

2 In the Windows Control Panel, double-click Add/Remove Programs.

3 Select CallPilot Web Messaging, and then click Add/Remove.

4 Click Yes to confirm that you want to remove CallPilot Web Messaging.

5 Run the CallPilot Web Messaging uninstall program.

   **Result:** The service starts and deletes the CallPilot virtual directory.

6 If required, restart your computer, and then manually remove the old directory and files that were in use.

   **Note:** The uninstall program does not remove the directory structure c:\CallPilot\WebMessaging\bin. You must remove this structure manually.

If the web client fails to stop the World Wide Web service or seems to hang while you stop the service, you may need to stop the service manually, as shown by the following:

**a.** In the Windows Control Panel, double-click Services. Select World Wide Web Publishing service, and then click Stop.

**b.** If this fails to stop the service, open a console window and type **net stop iisadmin /y**.

This stops all IIS services, such as FTP and World Wide Web.

**c.** You must restart these services after you uninstall Web Messaging.

In the Windows Control Panel, double-click Services. Select World Wide Web Publishing service, and then click Start.

## To install My CallPilot

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

**1** Log on to your IIS computer with administrator privileges.

**2** Run the installation program (setup.exe) from the "My CallPilot from Nortel Networks" CD-ROM (NTRH4593).

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

**Result:** The Welcome window appears.

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

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

## My CallPilot web server setup

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

## To test the installation

**1** Go to a client computer that has the required software for My CallPilot and access over the network to the My CallPilot web server.

**2** Start Internet Explorer or Netscape.

**3** Navigate to the My CallPilot web site, which is the virtual directory you created during installation.

**4** Type the My CallPilot URL in the following format:

**http://<webservername>/<virtual_directory_name>**

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

**5** Log on to My CallPilot.

## My CallPilot web server security

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

# Section D:  Controlling access to features

## In this section

# Overview of feature access options

## Introduction

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

## Mailbox classes

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

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

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

## Restriction permission lists

In a mailbox class with desktop messaging capability, an RPL is associated. CallPilot applies the desktop messaging RPL to all messages sent from the desktop messaging clients. If a message requires a feature that has an RPL associated with it, then CallPilot applies both RPLs to the call. For example, if a user sends a message to a fax machine, the desktop messaging RPL and the Delivery to Telephone RPL are both applied.

# Controlling access to desktop messaging features

## Introduction

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

## To set desktop messaging privileges

**1** In CallPilot Manager, choose User → Mailbox Classes.

**2** In the mailbox class list, click the name of the appropriate mailbox class.

**Result:** The Mailbox Class Browser page appears.

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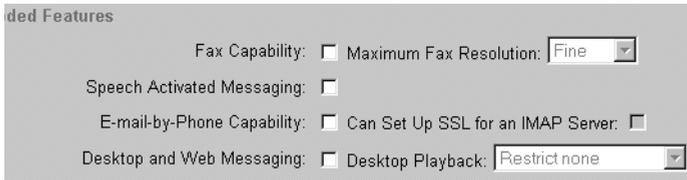


- To grant access to desktop messaging features, enable Desktop and Web Messaging capability.

- To restrict audio playback and recording to either the computer or telephone, select the appropriate option in the Desktop Playback list.

- To allow users to send and receive CallPilot fax and text messages, enable Fax Capability. Without fax capability, users can only send and receive voice messages.

**4** Click **Save**.

# Controlling access to My CallPilot features

## Introduction

The following options are available to all mailbox owners:

- **Useful Information**—The Useful Information section of My CallPilot provides mailbox status information, dialing numbers for your CallPilot system, and CallPilot user documentation.

- **Downloads**—The Downloads page provides access to media players for recording and playing voice messages.

- **My CallPilot Home Page**—This option enables mailbox owners to select the default My CallPilot section to display after logon.

In CallPilot Manager, you can provide additional features to mailbox owners, based on their needs.

## Controlling access to features

CallPilot mailbox class settings determine access to My CallPilot features. As you create or modify mailbox classes in CallPilot Manager to control access rights, consider how members of each mailbox class will use My CallPilot. In a mailbox class, you can control the following access rights:

- **access to keycoded feature preferences**—When you grant access to fax messaging, desktop and web messaging, or E-mail by Phone, configuration options for these features appear in My CallPilot.

- **access to mailbox management options**—When you grant access to Mailbox Manager, the following options are available in My CallPilot:
  - message notification preferences
  - personal distribution list management
  - password change
  - options for the telephone interface

- **access to message notification options**—When you grant access to remote text notification or remote notification to a telephone or pager, mailbox owners can set notification preferences in My CallPilot.

The illustrations below show the mailbox class options that affect My CallPilot feature availability:



keycoded features                                                      Mailbox Manager

remote text notification                                 remote notification to an
to a telephone or pager                                 e-mail device
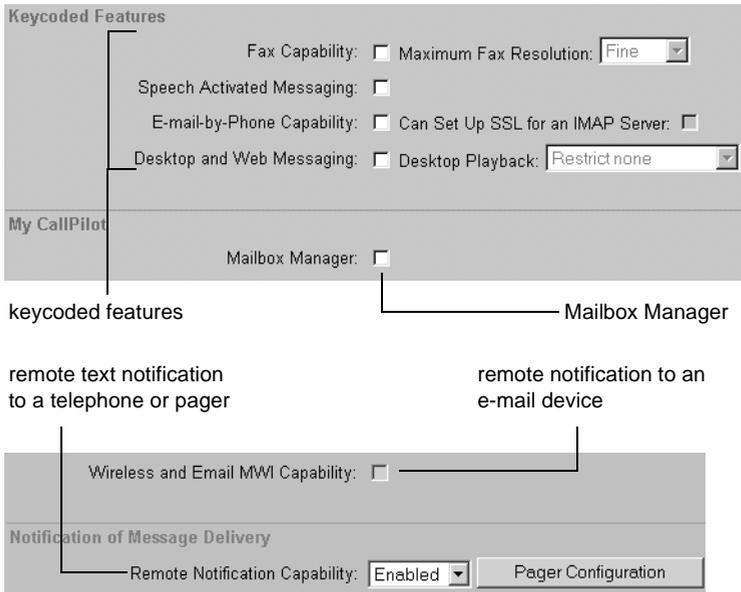


The table below summarizes the available access options:

| To make this feature available in My CallPilot... | Select these options in CallPilot Manager |
| --- | --- |
| fax options | Fax Capability |
| telephone access to e-mail (E-mail By Phone) | E-mail By Phone Capability |

| To make this feature available in My CallPilot... | Select these options in CallPilot Manager |
|---|---|
| web messaging (access to CallPilot messages and e-mail messages) and associated preferences | Desktop and Web Messaging |
| Mailbox Manager options | Mailbox Manager |
| preferences for remote notification to a telephone or pager | Remote Notification Capability |
| preferences for remote text notification to an e-mail device | Wireless and Email MWI Capability |

# Access levels for My CallPilot

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

## Reference information and documentation only

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

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



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



**My CallPilot**
My CallPilot options available for the mailbox class.

### Mailbox management only

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

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



**CallPilot Manager**

A mailbox class with mailbox management only.



**My CallPilot**

My CallPilot options available for the mailbox class.

### Keycoded features enabled without additional mailbox management

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

- fax messaging

- desktop and web messaging

- E-mail by Phone

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

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



**CallPilot Manager**

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



**My CallPilot**

My CallPilot options available for the mailbox class.

## Keycoded features enabled with mailbox management

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

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



**CallPilot Manager**

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

**Keycoded Features**

Fax Capability: ☑ Maximum Fax Resolution: `Fine ▾`

Speech Activated Messaging: ☐

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

Desktop and Web Messaging: ☑ Desktop Playback: `Restrict none ▾`

**My CallPilot**

Mailbox Manager: ☑

**CallPilot Manager**

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

| CallPilot Messages | Email | CallPilot Features | Useful Information |
|---|---|---|---|

**Mailbox: Nicola Yap (7240)**

| CallPilot Tools | Telephone Settings | Web Settings |
|---|---|---|

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

**Telephone Options**
Review and personalize your telephone interface and options presented to your callers.

**Mailbox Links**
Create and maintain links to mailboxes on other messaging services.

**Personal Distribution Lists**
Compose and edit lists of addresses to simplify messaging to groups of people.

**E-mail By Phone**
Maintain account information and set options for playing your e-mail over the telephone.

**My CallPilot Preferences**
Set preferences for your message list displays and behaviour, and options for message editing.

**Change Password**

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

**My CallPilot Home Page**
Set preferred page to start on after logging on.

**Downloads**
Download audio players for use with My CallPilot.

**My CallPilot**

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

# CallPilot server configuration for My CallPilot services

## Overview

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

## Providing user reference information

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

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

### To specify support information

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

## Specifying external e-mail servers

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

**To configure external e-mail servers**

1  In CallPilot Manager, choose Messaging → External Email Servers.

2  In the Text to Speech section, specify the download options for
   E-mail by-Phone users. For more information, see the CallPilot Manager
   online Help.

3  In the External Email Server list, define the servers users can access
   with E-mail-by-Phone and from My CallPilot.

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

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# CallPilot
Desktop Messaging and My CallPilot Installation Guide

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