



Nortel CallPilot

Desktop Messaging User Guide for Internet Clients

ATTENTION

Clicking on a PDF hyperlink takes you to the appropriate page. If necessary, scroll up or down the page to see the beginning of the referenced section.

Document status: Standard
Document version: 01.01
Document date: 1 March 2007

Copyright © 2007, Nortel Networks
All Rights Reserved.

Sourced in Canada

Information is subject to change without notice. Nortel Networks reserves the right to make changes in design or components as progress in engineering and manufacturing may warrant.

The process of transmitting data and call messaging between CallPilot and its servers, switches or system is proprietary to Nortel Networks. Any other use of the data and the transmission process is a violation of the user license unless specifically authorized in writing by Nortel Networks prior to such use. Violations of the license by alternative usage of any portion of this process or the related hardware constitutes grounds for an immediate termination of the license and Nortel Networks reserves the right to seek all allowable remedies for such breach.

Nortel Networks and third-party trademarks appear on the following pages:

*Nortel, the Nortel logo, the Globemark, and Unified Networks, BNR, CallPilot, DMS, DMS-100, DMS-250, DMS-MTX, DMS-SCP, DPN, Dualmode, Helmsman, IVR, MAP, Meridian, Meridian 1, Meridian Link, Meridian Mail, Norstar, SL-1, SL-100, Succession, Supernode, Symposium, Telesis, and Unity are trademarks of Nortel Networks.

3COM is a trademark of 3Com Corporation.

ACCENT is a trademark of Accent Software International Ltd.

ADOBE is a trademark of Adobe Systems Incorporated.

AMDEK is a trademark of Amdek Corporation.

AT&T is a trademark of American Telephone and Telegraph Corporation.

ATLAS is a trademark of Quantum Corporation.

ATRIA is a trademark of Pure Atria Corporation.

BLACKBERRY is a trademark of Research in Motion Limited.

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, Inc.

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.

Contents

How to get help	7
Using CallPilot Desktop Messaging for Internet clients	9
Getting started	9
Logging on to CallPilot	10
Working with your CallPilot messages	11
Playing voice messages	13
Viewing fax messages	14
Composing voice messages	14
Composing fax and text messages	16
Creating and sending fax batch messages	18
Using fax cover pages	25
Addressing messages	28
Setting up message forwarding	29
Using the Message Waiting Indicator	29
Changing your mailbox settings	31
Changing audio settings	33
Using My CallPilot	34

How to get help

This section explains how to get help for Nortel products and services.

Getting help from the Nortel Web site

The best way to get technical support for Nortel products is from the Nortel Technical Support Web site:

<http://www.nortel.com/support>

This site provides quick access to software, documentation, bulletins, and tools to address issues with Nortel products. More specifically, the site enables you to:

- download software, documentation, and product bulletins
- search the Technical Support Web site and the Nortel Knowledge Base for answers to technical issues
- sign up for automatic notification of new software and documentation for Nortel equipment
- open and manage technical support cases

Getting help over the phone from a Nortel Solutions Center

If you don't find the information you require on the Nortel Technical Support Web site, and have a Nortel support contract, you can also get help over the phone from a Nortel Solutions Center.

In North America, call 1-800-4NORTEL (1-800-466-7835).

Outside North America, go to the following Web site to obtain the phone number for your region:

<http://www.nortel.com/callus>

Getting help from a specialist by using an Express Routing Code

To access some Nortel Technical Solutions Centers, you can use an Express Routing Code (ERC) to quickly route your call to a specialist in your Nortel product or service. To locate the ERC for your product or service, go to:

<http://www.nortel.com/erc>

Getting help through a Nortel distributor or reseller

If you purchased a service contract for your Nortel product from a distributor or authorized reseller, contact the technical support staff for that distributor or reseller.

Using CallPilot Desktop Messaging for Internet clients

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

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

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

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

Getting started

About this guide

This user guide is an overview of how to use CallPilot with your Internet e-mail.

The instructions and screen images shown in this guide provide general information for using CallPilot with your e-mail. Specific details may vary for each e-mail application.

The CallPilot Player also includes online Help, available through the Help menu.

What you need

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

- CallPilot Player to play and record voice messages
- Nortel Fax Driver to create faxes
- Outlook Express 6.0, Outlook 2002 (XP) (Internet Mail Mode), Outlook 2003 (Internet Mail mode), Outlook 2007 (Internet Mail Mode), or Vista Windows Mail
- Windows 2000 Professional, Windows XP Professional, or Windows Vista
- Monitor with 256-color 800 x 600 capability
- 15 Mbytes of free disk space to install software
- Sound card and speakers for playing voice messages on your computer
- Microphone connected to your computer, or a telephone situated near your computer, for recording voice messages
- LAN (Ethernet), ISDN, ADSL, or dial-up modem connection to the CallPilot server for accessing CallPilot messages
- For My CallPilot access:
 - For Windows: Internet Explorer 6.0 and 7.0, Firefox 2.0 for Windows
 - For Macintosh: Safari 1.3.2 for Macintosh OS X
 - For Linux: Mozilla 1.7.x, Firefox 2.0

For updates on the latest supported versions, contact your CallPilot administrator.

Logging on to CallPilot

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

Step	Action
------	--------

- | | |
|---|--|
| 1 | Open your Internet e-mail.
A log on dialog box appears, similar to the example shown. |
|---|--|
-



- 2 If required, type your VPIM network shortcut and mailbox number.
- 3 In the **Password** box, type your CallPilot password.
- 4 Click **OK**.

Note: Do not leave the **Remember password** box checked on a shared computer.

—End—

To change your password the first time you log on

Your administrator can give you a password and tell you to change the password, before you log on through your Internet e-mail. To do this, log on to CallPilot from the telephone or log on to My CallPilot on your computer.

After the first time you log on, you can change your password from the CallPilot Player. See ["To change your CallPilot password" \(page 32\)](#).

To log off

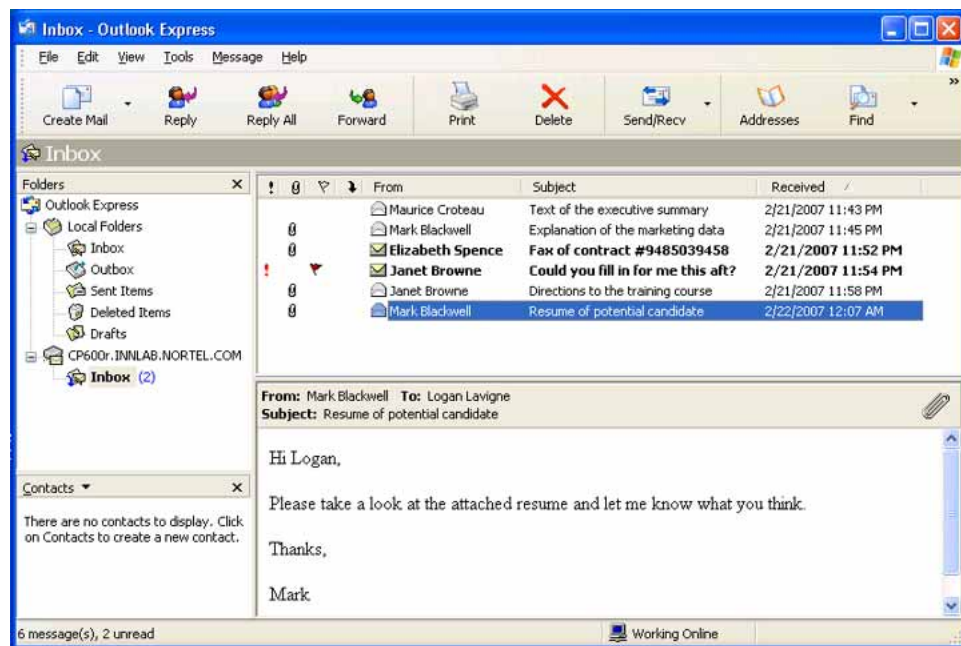
When you exit your e-mail application, you automatically log off from the CallPilot Desktop Messaging client as well.

Remote login

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

Working with your CallPilot messages

When you open your e-mail with CallPilot installed, your CallPilot messages appear in your inbox. You can open, move, copy, delete, forward, and reply to CallPilot messages, and compose new CallPilot messages, in the same way as your e-mail messages.



To open a message

To open a CallPilot message, double-click anywhere on the message line, and then double-click the voice or fax icon to open the attachment. See ["Playing voice messages" \(page 13\)](#), and ["Viewing fax messages" \(page 14\)](#).

To delete a message

Delete CallPilot messages the same way as your e-mail messages. You can delete a CallPilot message in your inbox or in an open message.

To mark CallPilot messages as read or unread

In your inbox, unread messages appear in bold text and read messages appear in plain text. You can change whether a message is marked as read or unread using a shortcut menu. These changes also affect your Message Waiting Indicator. For example, if you have no unread messages, and you then mark one as unread, your Message Waiting Indicator turns back on.

Step	Action
1	In your inbox, select one or more messages (hold down the Ctrl key to select more than one).
2	Right-click the selected message, and then click either Mark as Unread or Mark as Read .

These options are also available from the Edit menu.

Note: The wording of these options could differ on your Internet client.

—End—

Playing voice messages

You can choose to play your voice messages from your telephone or your computer.

To select your telephone or computer to play voice messages

To change the setting, or to change the telephone number that CallPilot dials, see ["Changing audio settings" \(page 33\)](#). You can also click the Telephone or Computer icon on the CallPilot Player to change the setting (see the following illustration of the CallPilot Player).

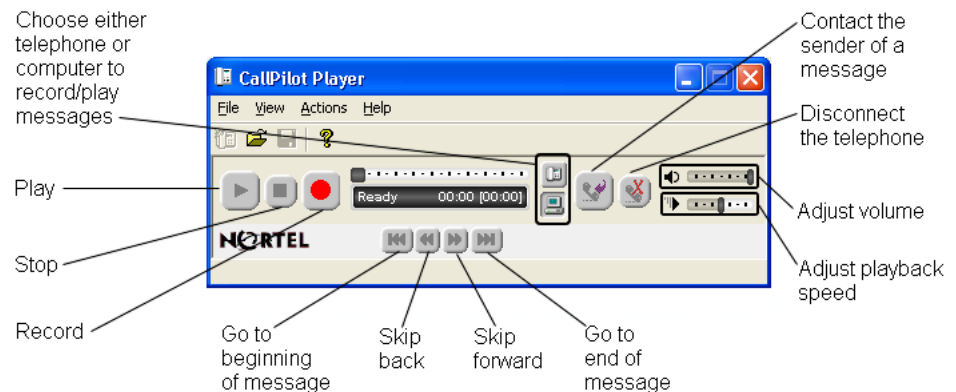
To play a voice message

Step	Action
------	--------

- 1 Double-click the message in your inbox, and then double-click the **Voice** icon in the open message, as shown here:



The CallPilot Player appears.



- 2 If you selected the telephone for playback, answer your telephone when it rings.
- 3 Use the buttons on the CallPilot Player to play or stop the message, and to go backward and forward. You can call the sender from your telephone.
- 4 You can print, delete, save, forward, and reply, as you would with an e-mail message.

- 5 When you are finished, hang up the telephone if you used it, close the CallPilot Player, and close the open message.

—End—

To save a voice message as a file to use later

Step	Action
1	In an open message, right-click the Voice icon, and then click Save as .
2	In the File name box, type a name for the file, select a folder to keep the file in, and then click Save .

—End—

Viewing fax messages

To view faxes, you can use the fax viewing software included with the Windows operating system, or install your own software.

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

To view a fax message

Step	Action
1	Double-click a fax message in your inbox, and then double-click the fax attachment.
2	While viewing the fax, you can enlarge or reduce the image, rotate or move it, print, delete, save, forward, and reply to the fax.
3	When you are finished, close the message.

—End—

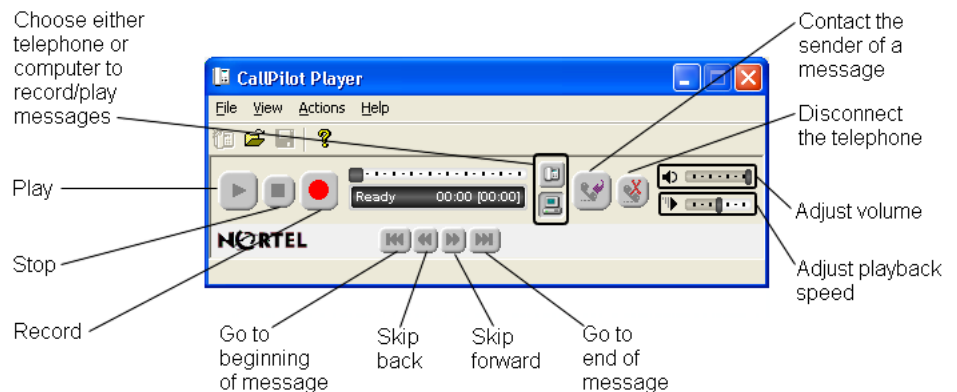
Composing voice messages

To compose and send a CallPilot voice message, you record a message, save it as a file, and then attach the file to a new message and send it. You can also save the file to send later.

To record a voice message and save the message as a file

- | Step | Action |
|------|--|
| 1 | From the Windows Start menu, click Programs > Nortel > CallPilot Desktop Messaging > Audio Player . |

The CallPilot Player appears.



- 2 Choose how you want to record the voice message: On the CallPilot Player panel, click either the telephone or computer icon.
- 3 To start recording, click the red **Record** button.
- 4 Do one of the following:
 - If you are recording from the computer, record your message into the microphone. Click **Stop** to end the recording. Click **Play** to review it. To add to the recording, click **Record**, speak again, and then click **Stop**.
 - If you are recording from the telephone, answer when the telephone rings. At the tone, record your message. Click **Stop** to end the recording. Click **Play** to review it.

When you are finished, hang up the telephone.
- 5 On the CallPilot Player **File** menu, click **Save As**, and type a name for the file. Save the file as a VBK file.
- 6 Click **Save**.

—End—

To send a voice message

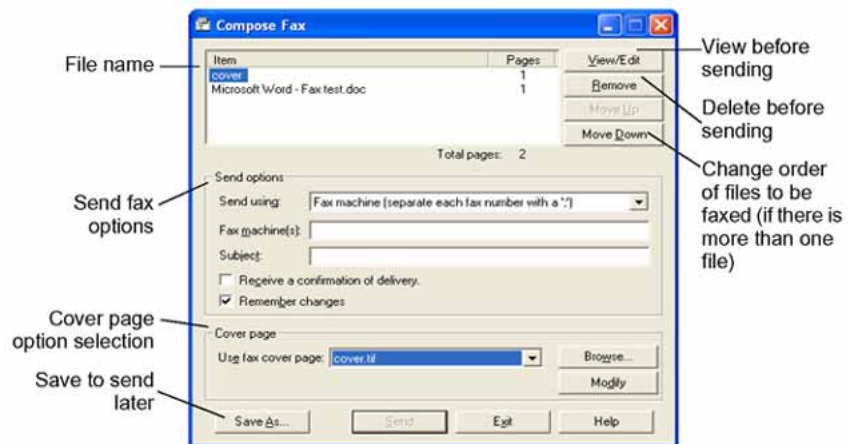
Step	Action
1	From your e-mail inbox, open a new message form.
2	Add the voice file you recorded as an attachment. You can also add text to the message.
3	Address and send the message the same way as an e-mail. Note: Ensure that plain text format is selected in your e-mail client. If rich text format (RTF) is selected, the message delivery may fail.
—End—	

Composing fax and text messages

To create a fax, your CallPilot mailbox must have fax capability, and your computer must have Desktop Messaging installed. CallPilot recipients of your fax must also have fax capability to view the fax on their computer. E-mail recipients do not require specific fax capability. If your recipients access their messages from their telephone, they can view the fax only by printing it. You can also send your fax to a fax machine.

To create and save a fax file

Step	Action
1	Start the application you want to use to create the fax, for example, Microsoft Word. The document you open or create must be no wider than 8.5 in. (21.5 cm). Multiple page documents are allowed.
2	When the document is ready, from the File menu, select Print , or whichever option opens the dialog box to allow you to select a printer.
3	From the list of printers, select Nortel Fax ,
4	Click OK or Print , or whichever option sends the file to the printer you selected. The Compose Fax dialog box appears.



- 5 If you want to include a cover page with the fax, choose one from the **Use fax cover page** list, or click the **Browse** button to navigate to a different one.
For more information, see ["Using fax cover pages" \(page 25\)](#)
- 6 Click **Save As**.
- 7 Type a name for the file and browse to select a folder to save the file in. Save the file as a TIF file.
- 8 Click **OK**.
- 9 To close the **Compose Fax** dialog box, click **Exit**.

—End—

To send a single fax or text message

Step	Action
1	From your e-mail inbox, open a new message form.
2	Add a fax file as an attachment, or type text. Fax files must be in TIF format.
3	Address and send the message the same way as an e-mail.

—End—

Creating and sending fax batch messages

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

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

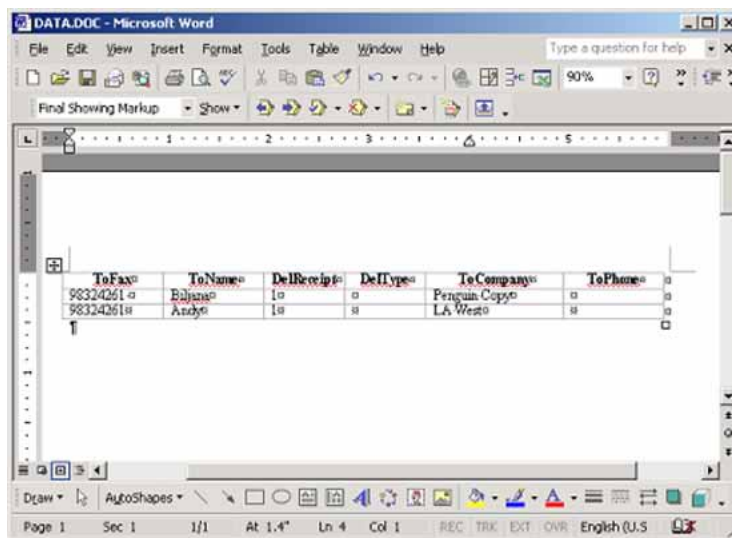
Your CallPilot Desktop Messaging installation includes a sample Microsoft Word data source named Data.doc and a sample Microsoft Word main document named Sample.doc.

Accessing and modifying the sample Data source document

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

Step Action

- 1 Go to \Program Files\Nortel\CallPilot\fax directory and open the Data.doc file.



- 2 Add new columns or subtract existing ones, as required. For new columns, chose a meaningful column header name.
- 3 Add the required data under each column header. The data source can be created by any means available to populate a Microsoft Word table, including importing information from existing files.

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

The following parameters and characters are supported in the ToFax text box:

- Maximum supported length for the fax phone number is 120 characters.
- Numbers 0 through 9 are supported.
- Uppercase and lowercase P and the comma is used when a pause is necessary.
- The Pound sign (#) is supported.
- Common phone number symbols, such as left and right parentheses and the dash, are supported.
- Spaces are supported.
- When placed before a CallPilot mailbox number, to designate the mailbox address, the M is not case-sensitive.

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

- **ToName:** This is the fax recipient's name and can be up to 256 characters in length.
- **DelReceipt:** You can use this tag to receive a Delivery Receipt in the form of a CallPilot message in your CallPilot mailbox, when the fax is delivered to the recipient. If the DelReceipt text box is set to 1, then a delivery receipt is generated. If DelReceipt is set to 0, a delivery receipt is not generated for that recipient. If the DelReceipt text box is empty, or the field is not in Data.doc, then no delivery receipt is generated.
- **DelType:** This text box is used to set a delivery priority for each recipient. If the DelType text box is set to 0 or is left empty (or if

DelType Text Box is not present in your Data.doc), the message is tagged for Normal delivery. If DelType is set to 1, then the message is tagged for Economy delivery. If DelType is set to 2, then the message is tagged for Urgent delivery. Messages sent to non-CallPilot recipients with the Delivery Type set to Economy is delivered on a schedule defined by the CallPilot server for Economy delivery. Note that messages sent to CallPilot mailboxes is not affected by the Economy designation and is sent as Normal messages. Transmission of messages tagged as Normal or Urgent is gin immediately. Urgent messages display the Urgent icon when displayed from My CallPilot or a Desktop Messaging client and a voice prompt identifies the message as Urgent from the CallPilot telephone interface. Messages sent Urgent are treated as Normal when they are sent to non-CallPilot addresses.

- 4 When you have updated the table, save all changes. You normally supply a unique name for your data file; however, for the remainder of these procedures, the name Data.doc is used.
- 5 Close the document. The Data.doc file can now be used as a data source by Microsoft Mail Merge.

—End—

Accessing and modifying the sample Main document

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

Step	Action
------	--------

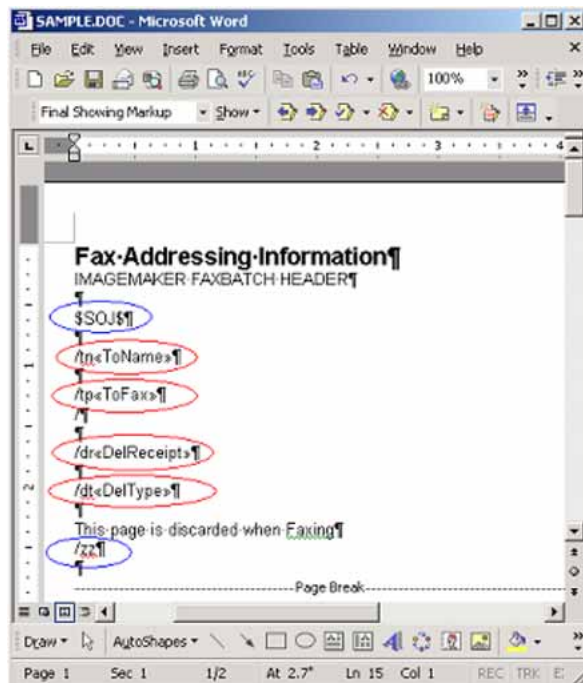
- | | |
|---|--|
| 1 | From the \Program Files\Nortel\CallPilot\fax directory, open Sample.doc in Microsoft Word. |
|---|--|
-

—End—

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

First page

The first page of the main document is a special page and does not become part of the final fax. Sample.doc is installed with the first page set up correctly.



The purpose of this page is to provide a location to map information in the data source to each customized fax document. To signal CallPilot that this is a Fax Batch file, and to prevent this page from becoming part of the fax, two special control codes **must** be present on the first page:

- | | |
|---------|---|
| \$SOJ\$ | Start of Job, signals the fax driver to start processing, and can be placed anywhere on the first page. |
| /zz | Start this page, prevents the first page from becoming part of the fax message, and can be placed anywhere on the first page. |

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

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

To complete the page, the Fax Number column header (that is, <<ToFax>) must be inserted after the /tp control using the Mail Merge insert function. Also, the Delivery Receipt column header (that is, <<DelReceipt>>) can be inserted after the /dr control, the Name of Recipient text box (that is, <<ToName>>) can be inserted after the /tn control, and the Delivery Type text box (that is, <<DelType>>) can be inserted after the /dt control.

Note: All fax batch controls are case sensitive.

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

```
/tp9<<ToFax>>
```

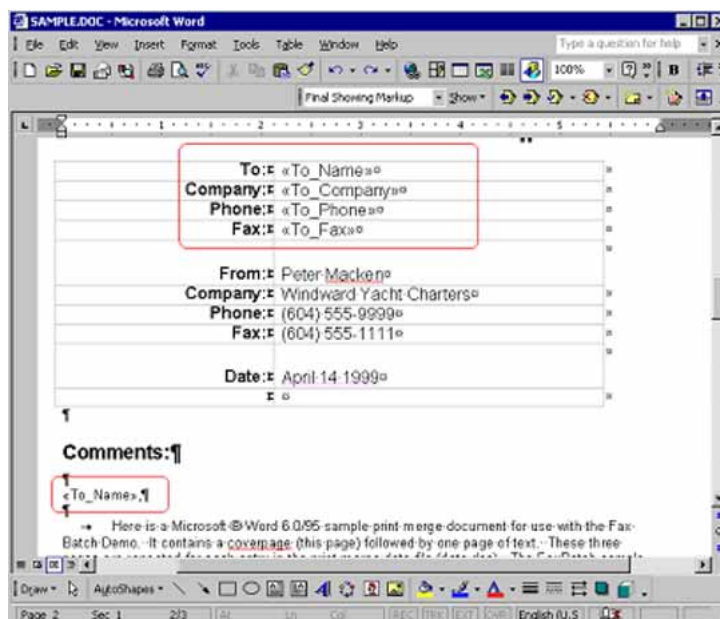
In this example, a 9 is added to the beginning of each phone number during fax batch processing. The data source remains unchanged, and can be used from a different location that does not require a 9 for external access.

Second page

Once the data source document and the first page of the main document are created, you can begin to customize your fax.

Note: The page must be equal to, or less than 8.5 inches in width.

You can use all of the data source column header tags to customize the document. The following is an example using the Sample.doc file:



In this example, the document is customized for each recipient. Data source column headers are inserted into the document using the Microsoft Word Mail Merge utility Insert function. After the main document is customized, the document is ready to be merged with the information in the Data.doc file. Consult your Microsoft Word Mail Merge help for more details on inserting data source text boxes into the document.

Merging data from the data source into the main document

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

Step	Action
1	Start Mail Merge from the Microsoft Word Tools menu. Depending on which version of Microsoft Word you are using, Mail Merge is under different menu headings. - In Office XP, select Tools > Letters and Mailings > Mail Merge Wizard. - In Office 2000, select Tools > Mail Merge. - In the Office 2007, select Mailings > Start Mail Merge > Step by Step Mail Merge Wizard.
2	Verify that Sample.doc is currently selected as the main document, and that Data.doc is currently selected as the data source.
3	Select Merge to Printer , and then select the Nortel Fax Batch driver from the Print dialog box that appears.

Note: Ensure that Microsoft Word is not set up to print pages in reverse order.

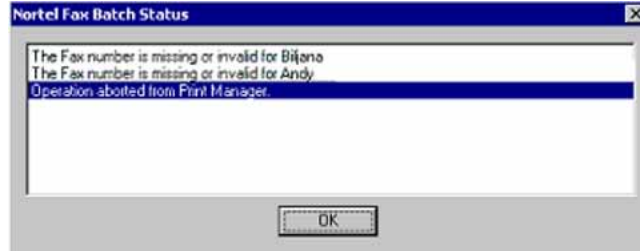
- 4 Click **OK** in the Print dialog box to initiate the batch fax process.

—End—

When the document is merged, data values from the data source file are merged into the main document at the appropriate tag positions and a separate fax TIF file for each recipient is created. CallPilot Desktop software addresses and transfers the fax files to the server. The CallPilot server sends the fax to the recipients.

After the process starts, the Print Status dialog box appears. The page number increases incrementally as each page is converted to a TIF file. Since the first page is skipped, this page is not included in the count. For example, if a three-page fax is sent to ten recipients, the dialog box displays Printing page 1, Printing page 2, and continues up to Printing page 20. Only 20 pages are printed, because the first page of each document is skipped.

Problems that occur while creating the fax images, or with the fax addresses, are displayed in a separate Nortel Fax Batch Status dialog box:



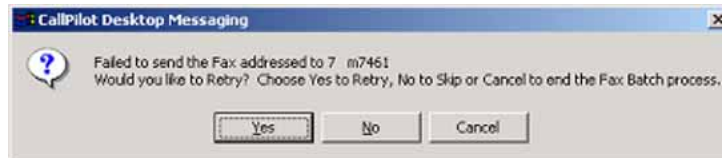
Problems, such as a missing fax address or an unsupported fax address format, are checked. However, problems such as a wrong fax number is not identified, provided the number is in a valid format. A wrong fax number, however, results in the sending of a non-delivery receipt to the user's CallPilot mailbox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

When you click OK, the batch process ends, and no faxes are sent. You must fix the fax addresses, and resubmit the job.

If all faxes and addresses are created properly, a dialog box appears while the faxes are being addressed and transferred to the CallPilot Server. The Nortel Fax Batch Status dialog box indicates the status of the batch job. If you press Cancel in this dialog box before the job is completed, another

dialog box appears, asking you to confirm the cancellation. If you select Yes, all temporary files are deleted, and the process ends. However, all faxes that are already transferred to the CallPilot server are sent.

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



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

A confirmation dialog box appears once all faxes have been submitted to the server.

Using fax cover pages

You can choose to include a cover page with your faxes. The server administrator typically designs and manages these cover pages, but you can choose the desired style of cover page (if more than one is available).

Cover pages created with these tools include the following information:

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

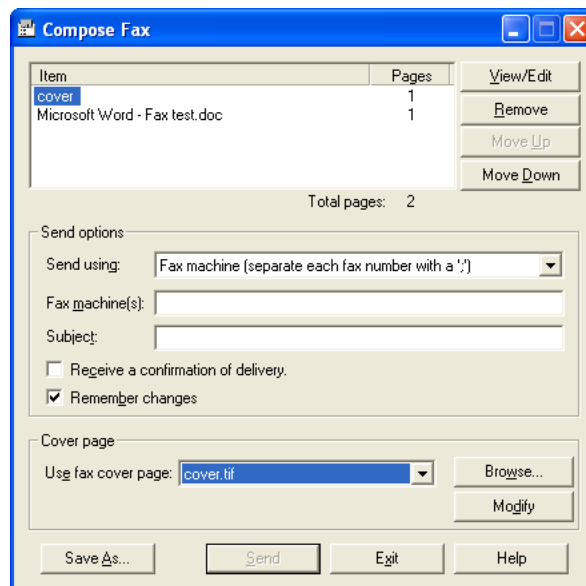
Number of Pages

Sent Date & Time

A Cover Sheet Memo section

Nortel Fax printer driver form

You can select a cover page in the Compose Fax dialog box when you are using the Nortel Fax printer driver to create a fax (for step-by-step procedures, see ["To create and save a fax file" \(page 16\)](#)).



If you choose to send your fax to a specific destination (for example, a fax machine), you can then select a cover page from the Use fax cover page list. You can then modify the cover page contents (see the following section). If you do not want a cover page, select No cover page from the list.

Modifying and previewing fax cover pages

You can preview the current cover page and modify its contents by clicking the Modify button in the Nortel Fax Printer driver window.

Modify Cover Page

To

Title: Mr Name: Jones

Company: Company Name Department: 445588

Fax: Phone: 9558889421

From

Title: Mr Name: Name

Company: Company Name Department: Z345

Fax: 5055555555 Phone: 5055555556

Pages: 2 (including cover) Sent: 5/19/2005 9:19 AM

Memo

This is the Memo section of the cover page.

Preview OK Cancel Help

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

Cover Page Preview

Page 1

Facsimile Cover Sheet

To:	Mr Jones	From:	Mr Jones
Company:	Company Name	Company:	Company Name
Department:	Department	Department:	Department
Fax:	5055555555	Fax:	5055555556
Phone:	9558889421	Phone:	9558889421

Pages including this cover page: 2 Date: 5/19/2005 9:19 AM

Memo

This is the Memo section of the cover page.

Close

You can make changes to the cover page fields; however, the Fax text box is always read-only. CallPilot populates the Fax text box using address information from the Fax driver forms. The Memo section displays information from the Modify cover page form.

Note: The maximum length of the Memo text box is 2500 characters. The maximum length of the other cover page text boxes is 30 characters.

Addressing messages

To address a message from an address book

You can address a CallPilot message from the CallPilot Address Book on the server, or from the e-mail address book on your computer or on the server. Address CallPilot messages the same way as your e-mail messages.

- The CallPilot Address Book on the server is maintained by your organization, and contains the addresses of the CallPilot users and distribution lists that you are allowed to use. You cannot edit this list.
- If you maintain a personal address book of e-mail addresses, you can add CallPilot addresses to this list.

To add CallPilot addresses to your personal address book

If you have an e-mail personal address book on your computer, you can add CallPilot addresses and distribution lists to it. Add CallPilot addresses the same way as e-mail addresses. You may want to distinguish between CallPilot and e-mail addresses by adding CallPilot after the recipient's name.

To address a message manually

You can type an address directly into the To text box of a new message. If you choose to do this, use the following format guidelines:

Required format for a CallPilot e-mail address

XXXXYYYY@ZZZZ

where

xxxx = VPIM network shortcut

yyyy = CallPilot mailbox number

zzzz = CallPilot server FQDN (server and domain)

Example of a CallPilot address entered manually

If a CallPilot server *na12345* in the domain *us.nortel.com* with VPIM network shortcut *1905555* contains mailbox *1212*, the CallPilot address for that mailbox would be:

[19055551212@na12345.us.nortel.com]

Setting up message forwarding

You can forward your CallPilot messages to another CallPilot mailbox or to an external e-mail address. To do this, you must create and enable a message forwarding rule, which is a set of criteria defining which messages to forward and where to forward them.

Either you or your CallPilot administrator can create a message forwarding rule. To create it yourself, you must use My CallPilot; however, you can enable and disable it using either My CallPilot or the telephone (option 8-5-1).

For information about configuring and enabling a message forwarding rule, see the *Desktop Messaging User Guide for My CallPilot* (NN44200-109).

IMAP clients

You can access your IMAP client from a Windows, Macintosh or Linux computer. You can access CallPilot messages directly by connecting to a CallPilot server or to a third party e-mail server. Windows and Macintosh users have the option of installing the CallPilot player and receiving their messages in VBK format. Forwarded CallPilot messages appear in the standard e-mail form for the e-mail client, and they display with standard e-mail icons.

Using the Message Waiting Indicator

Desktop Messaging includes a Message Waiting Indicator (MWI) that appears as a telephone handset icon in the lower-right corner of your screen, in the Windows taskbar or system tray. The Message Waiting Indicator notifies you if you have new messages and provides you with quick access to your inbox.

A red telephone handset icon indicates that you have new messages:



The appearance of the Message Waiting Indicator icon changes to give you additional information about your connection to the server as follows:



You are not logged on to CallPilot



You are logged on, but you have no new messages



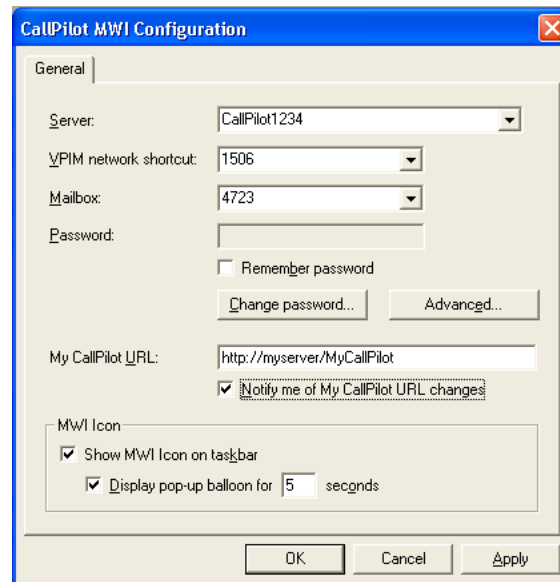
There is a communication problem with the server

To configure the Message Waiting Indicator

Use the CallPilot MWI Configuration dialog box to

- show or hide the Message Waiting Indicator
- enable and disable its pop-up balloon text
- control how long the balloon text stays on the screen

Step	Action
1	In the Windows taskbar, right-click the Message Waiting Indicator icon.
2	Click CallPilot MWI Configuration . The CallPilot MWI Configuration dialog box appears.
3	If you want to open My CallPilot and play your latest message by double-clicking the icon, ensure that the My CallPilot URL box contains the correct URL. You must be connected to a CallPilot 5.0 or later server for this to work. Ask your CallPilot administrator for the correct URL. Typically, the URL appears in one of the following formats: • <code>http://prefix.hostname.com/mycallpilot/</code> • <code>http://IP address/mycallpilot/</code>
4	To show or hide the Message Waiting Indicator icon, select or clear the Show MWI Icon on taskbar check box.



- `http://prefix.hostname.com/mycallpilot/`
- `http://IP address/mycallpilot/`

Note: If you hide the icon and then decide you want to show it again, from the Windows Start menu, choose Programs > Nortel > CallPilot MWI Icon. The icon reappears in the taskbar.

- 5 To enable or disable the balloon text, select or clear the **Display pop-up balloon for x seconds** check box. You can also change the number of seconds the balloon text appears on the screen.
- 6 To save your changes, click **OK**.

—End—

To use the Message Waiting Indicator

Here are some helpful tips for using the Message Waiting Indicator:

- To display your mailbox number, the address of the server, and the number of messages waiting in your inbox, position the pointer over the icon.
- Right-click the icon to display a shortcut menu with options to:
 - open My CallPilot (if a URL for My CallPilot is defined in the configuration settings for the Message Waiting Indicator)
 - configure the Message Waiting Indicator
 - log on to or off from your CallPilot mailbox
 - exit from the Message Waiting Indicator so it no longer appears
- To open your latest CallPilot message in My CallPilot, double-click the Message Waiting Indicator icon.
- **Note 1:** If this does not work, ensure that the My CallPilot URL box contains the correct URL in the CallPilot MWI Configuration dialog box. To open it, right-click the Message Waiting Indicator icon, and then click CallPilot MWI Configuration.

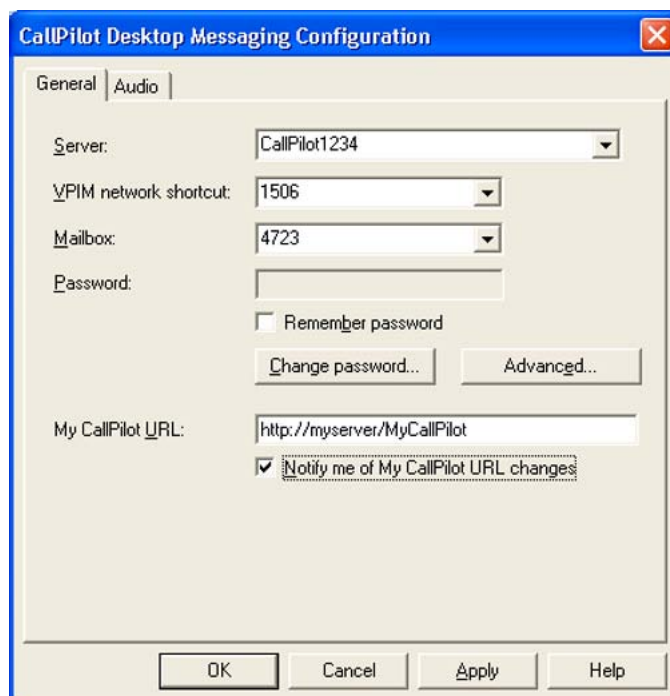
Note 2: If you are using Internet Explorer 6, a new browser session might start each time you double-click the Message Waiting Indicator to read a new message. You can change this behavior as follows: From the Internet Explorer Tools menu, click Internet Options. Click the Advanced tab, and then in the Browsing options, ensure the Reuse windows for launching shortcuts option is selected.

Changing your mailbox settings

Your administrator enters the default CallPilot access information for you. You can change these settings if required.

To view or change your CallPilot access settings

- | Step | Action |
|------|---|
| 1 | Open the CallPilot Player: From the Windows Start menu, click Programs > Nortel > CallPilot Desktop Messaging > Audio Player . |
| 2 | On the CallPilot Player, select View > Configuration . |
| 3 | Click the General tab to display your current access settings. |

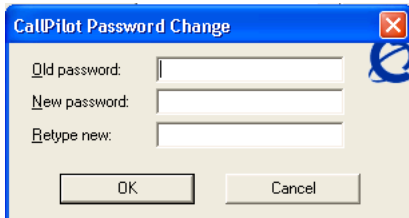


- 4 Make any changes required.
For information about the fields on this tab, click the Help button.
Note: To change the IMAP port or specify SSL, click Advanced.
- 5 When you are finished, click **OK**.

—End—

To change your CallPilot password

Your CallPilot password is the same password that you use from the telephone.

Step	Action
1	Repeat steps 1 to 3 in the previous procedure to open the General tab.
2	Click Change Password .
	 The image shows a 'CallPilot Password Change' dialog box. It has a title bar with a close button (X) and a help icon. Inside, there are three text input fields labeled 'Old password:', 'New password:', and 'Retype new:'. Below the fields are two buttons: 'OK' and 'Cancel'.
3	In the Old password box, type your current password.
4	In the New password box, type your new password.
5	In the Retype new box, type your new password again.
6	Click OK to save the change.
7	Click OK to exit the General settings.

—End—

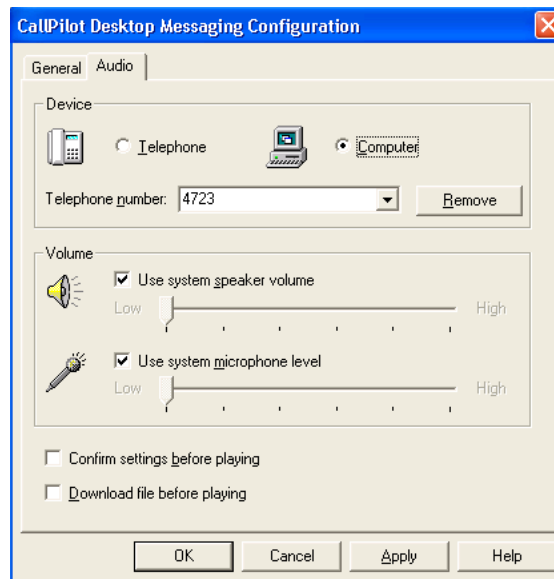
Changing audio settings

You can choose either your telephone or your computer for playing and recording messages, and you can adjust volume settings.

To change the audio device and volume

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

Step	Action
1	Open the CallPilot Player: From the Windows Start menu, click Programs > Nortel > CallPilot Desktop Messaging > Audio Player .
2	On the CallPilot Player, select View > Configuration .
3	Click the Audio tab to display the current Audio settings.



- 4 In the **Device** settings, click **Telephone** if you want to play and record your voice messages from your telephone. Make sure the correct telephone number appears. Or, click **Computer** if you want to play and record your voice messages through your computer speakers and microphone.

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

- 5 In the **Volume** settings, check the two check boxes if you want to coordinate your CallPilot volume settings with your computer speaker and microphone volumes.
- 6 If you want a reminder to check these settings before playing or recording voice messages, check **Confirm settings before playing**.

Note: The option to **Download file before playing** does not affect Desktop Messaging for Internet Clients because all messages are automatically downloaded before playing.

- 7 Click **OK**.

—End—

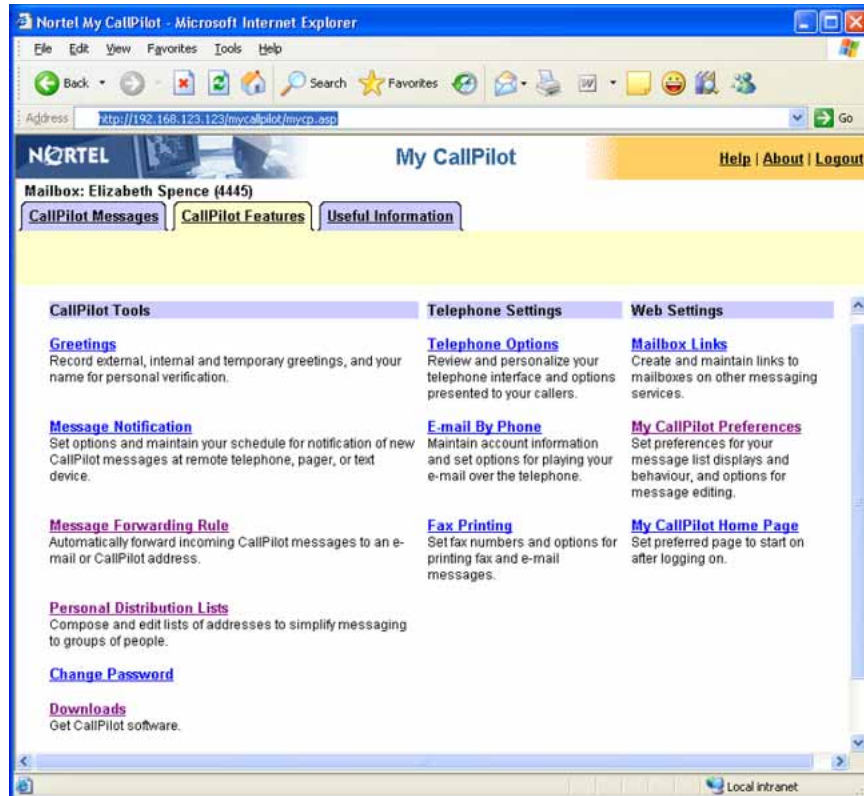
Using My CallPilot

If the Web-based resources of My CallPilot are available for your mailbox, your administrator provides you with the URL. For more information about My CallPilot, see the *Desktop Messaging User Guide for My CallPilot* (NN44200-109).

To view or change your CallPilot feature settings

Step	Action
------	--------

- | | |
|---|---|
| 1 | In My CallPilot, click the CallPilot Features tab. |
|---|---|



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

—End—

To view user information

Step	Action
------	--------

- | | |
|---|--|
| 1 | In My CallPilot, click the Useful Information tab to view online user information specific to your mailbox. |
|---|--|

CallPilot Messages

CallPilot Features

Useful Information

Your Mailbox Status

1. Your mailbox can store approximately **15** minutes of audio.
2. Voice messages are deleted **7** days after listening to them.
3. Read faxes are deleted after **7** days.
4. When your mailbox is full, your call answering is **not blocked**.
5. Messages that you send **are not saved** in your mailbox.
6. The maximum length of an outgoing message is **10** minutes.
7. An incoming message can be no longer than **5** minutes.
8. Your password was last changed **thursday 02 november 2006 at 13:24:57**.
9. Last logon to this mailbox was **friday 22 december 2006 at 01:33:32**.
10. Number of failed logon attempts **0**.

CallPilot Access Numbers

- | | |
|--------------------------------|-----------------|
| 1. Voice Messaging: | 4300 |
| 2. Express Voice Messaging: | n/a |
| 3. Speech Activated Messaging: | n/a |
| 4. Name Dialing: | (Not Available) |
| 5. Default Fax Number: | n/a |
| 6. Fax Messaging: | n/a |
| 7. Express Fax Messaging: | n/a |
| 8. Dial Prefix: | 9 |
| 9. Area Code: | 506 |
| 10. Exchange: | n/a |
| 11. ESN Access Code: | 6 |
| 12. ESN Exchange: | (Not Available) |

Need More Help?

No CallPilot support information has been defined.

CallPilot User Documentation

[PDF User Guides and Reference Cards](#)

—End—

Nortel CallPilot

Desktop Messaging User Guide for Internet Clients

Copyright © 2007, Nortel Networks
All Rights Reserved.

Publication: NN44200-108
Document status: Standard
Document version: 01.01
Document date: 1 March 2007

To provide feedback or report a problem in this document, go to www.nortel.com/documentfeedback.

Sourced in Canada

The information in this document is subject to change without notice. The statements, configurations, technical data, and recommendations in this document are believed to be accurate and reliable, but are presented without express or implied warranty. Users must take full responsibility for their applications of any products specified in this document. The information in this document is proprietary to Nortel Networks.

Nortel, the Nortel logo and the Globemark are trademarks of Nortel Networks.

