555-7101-505

CallPilot

Desktop Messaging and My CallPilot Installation Guide

Product release 2.0 Standard September 2002

NORTEL NETWORKS™

CallPilot

Desktop Messaging and My CallPilot Installation Guide

Publication number:	555-7101-505
Product release:	2.0
Document release:	Standard
Date:	September 2002

Copyright © 2002 Nortel Networks, All Rights Reserved

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 the Meridian 1 and CallPilot 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, the Nortel Networks 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.

EUDORA is a trademark of Qualcomm.

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

GROUPWISE and NOVELL are trademarks of Novell Inc.

NETSCAPE COMMUNICATOR is a trademark of Netscape Communications Corporation.

NOTES is a trademark of Lotus Development Corporation.

Publication history

September 2002	Released as Standard issue.
August 2002	Released as Preliminary 0.04 for formal review.
May 2002	Released as Preliminary 0.03 For Beta Trial.
March 2002	Released as Preliminary 0.02 for Beta Trial. Incorporates feedback from Alpha Trial review.
November 2001	Updated the draft to ensure the guide is consistent with the corresponding installation chapter released for review at Alpha Trial with the CallPilot Installation and Configuration guide.
October 2001	This is the initial draft of the *CallPilot Desktop Messaging Installation Guide*, Release 2.0, for review at Alpha Trial.

Contents

Section A: Getting started **9**
Product overview 10
Related information products 12
Installation overview. 18
Pre-installation checklist. 19

Section B: Configuring the CallPilot Server **21**
Defining the CallPilot server FQDN 22
Configuring messaging services 25
Defining addressing prefixes 28

Section C: Installing software **31**
Desktop messaging requirements 32
Installing desktop messaging 36
My CallPilot requirements 40
Installing My CallPilot 43

Section D: Controlling access to features **47**
Overview of feature access options 48
Controlling access to desktop messaging features 49
Controlling access to My CallPilot features 50
CallPilot server configuration for My CallPilot services 57

Index **59**

Section A: Getting started

In this section

Product overview	10
Related information products	12
Installation overview	18
Pre-installation checklist	19

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 2.0 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 ■ configure servers after installation ■ 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 ■ desktop messaging online Help ■ 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 This is a binder that contains the following five documents: ■ *Part 1: Installation and Maintenance Overview* ■ *Part 2: <Server model> Server Hardware Installation* ■ *Part 3: <Switch name> and CallPilot Server Configuration* ■ *Part 4: Software Installation and Maintenance* ■ *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	2.0	555-7101-507
Networking Planning Guide	1.0	555-7101-100
NMS Implementation and Administration Guide	1.0	555-7101-302
AMIS Networking Implementation and Administration Guide	1.0	555-7101-303
Enterprise Networking Implementation and Administration Guide	1.0	555-7101-304
Integrated AMIS Networking Implementation and Administration Guide	1.0	555-7101-305
VPIM Implementation and Administration Guide	1.0	555-7101-306

Note: The CallPilot 1.0 networking guides remain 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 phoneset users and desktop messaging users:

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

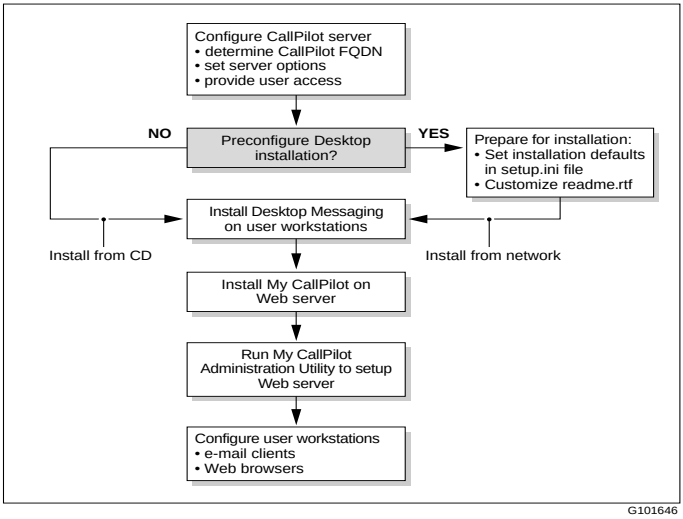
Contacting technical support

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:



Compatibility

Desktop messaging 2.0 works with CallPilot 2.0, CallPilot 1.07, CallPilot 150, and Business Communications Manager servers. Some CallPilot 2.0 features are only available with a CallPilot 2.0 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

Defining the CallPilot server FQDN 22
Configuring messaging services 25
Defining addressing prefixes 28

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 these 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 2.0 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. In the LDAP section, check the Enable LDAP box to turn on LDAP service.
3. Choose the required LDAP options and specify the LDAP search base.

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

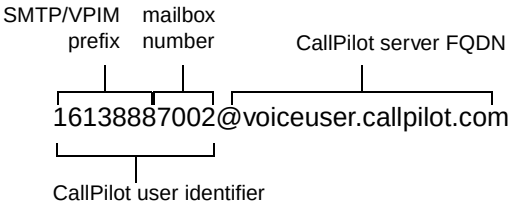
Open VPIM shortcut

A numeric prefix that CallPilot uses to identify VPIM-compliant sites that are not defined in your network database. These VPIM-compliant sites are refered 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.



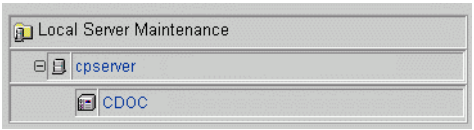
In a Network Message Service (NMS) system, the SMTP/VPIM prefix allows two different NMS sites to have the same mailbox number.

	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	32
Installing desktop messaging	36
My CallPilot requirements	40
Installing My CallPilot	43

Desktop messaging requirements

Servers

You must install CallPilot with a keycode that enables desktop messaging features. Desktop messaging works with CallPilot 1.07 or 2.0 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 2.0 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 ■ Microsoft Outlook 2002 (SP-1) ■ Novell GroupWise 6.x ■ Lotus Notes 4.6 and 5.x	■ Microsoft Outlook Express 5.0 or 6.x ■ Microsoft Outlook 98 or 2000 (SR-2) in Internet mail mode ■ Microsoft Outlook 2002 (SP-1) ■ Netscape Mail 6.2x ■ 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 32.

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 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 47.

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 33.

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 ■ 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 40.

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	48
Controlling access to desktop messaging features	49
Controlling access to My CallPilot features	50
CallPilot server configuration for My CallPilot services	57

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

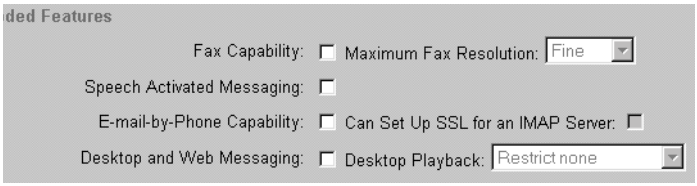
Introduction

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.

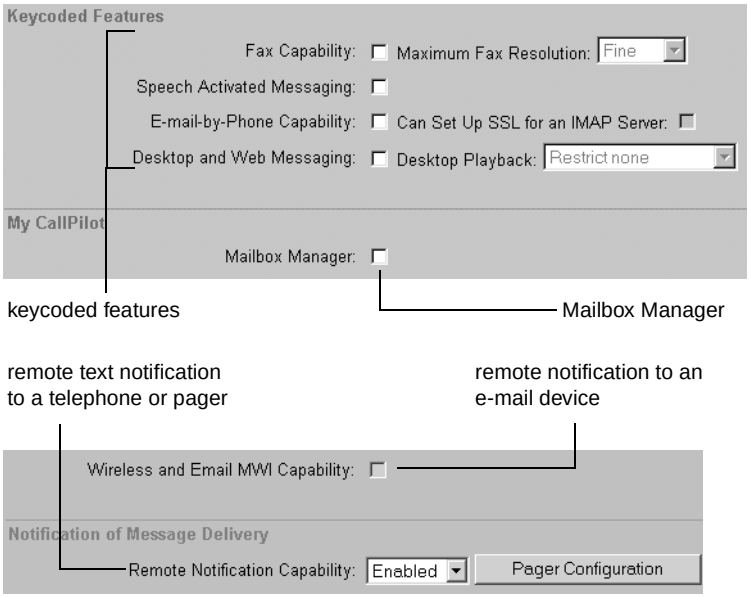
Controling access to features

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:



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

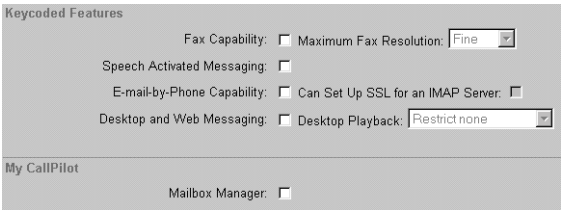
Access levels for My CallPilot

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

Reference information and documentation only

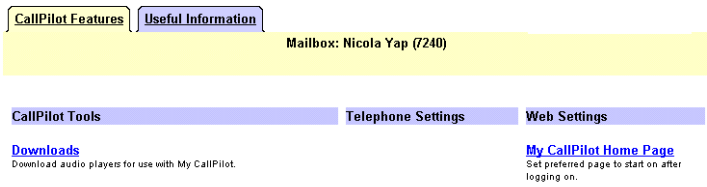
If you disable keycoded features and Mailbox Manager, My CallPilot only provides access to the Useful Information area, the Downloads page, and selection of the default My CallPilot tab.

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.



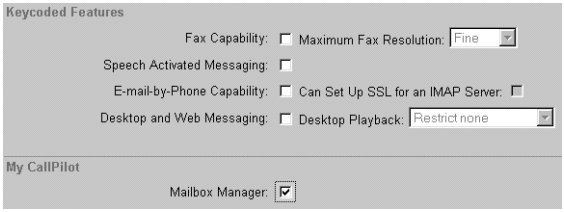
My CallPilot

My CallPilot options available for the mailbox class.

Mailbox management only

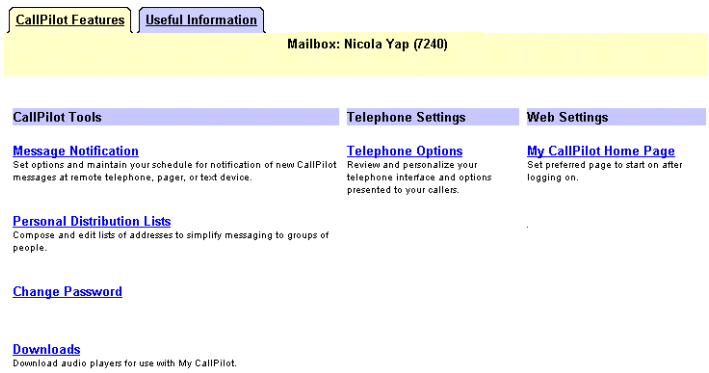
Since My CallPilot provides a graphical interface for configuring mailbox options, mailbox owners who do not require keycoded features can still benefit from web-based access to mailbox management.

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.

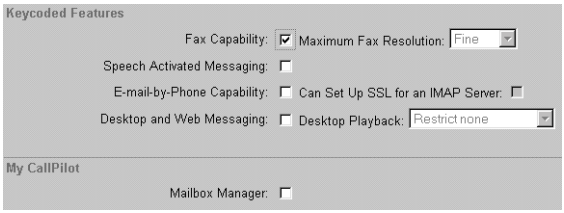
Keycoded features enabled without additional mailbox management

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

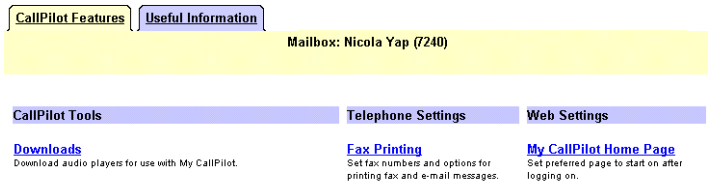
If some mailbox owners require keycoded features, and will only access My CallPilot occasionally to change their preferences, you can enable the required keycoded features and disable Mailbox Manager.

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.



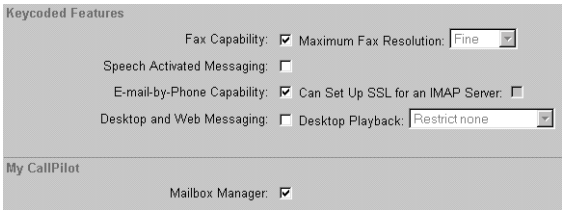
My CallPilot

My CallPilot options available for the mailbox class.

Keycoded features enabled with mailbox management

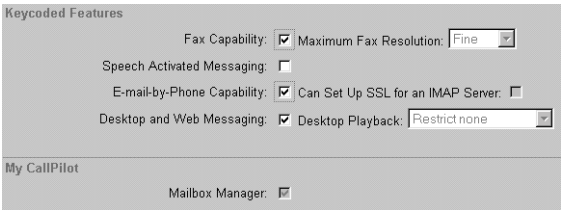
When you enable keycoded features for a mailbox class, you can also enable Mailbox Manager to provide access to mailbox management features.

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.



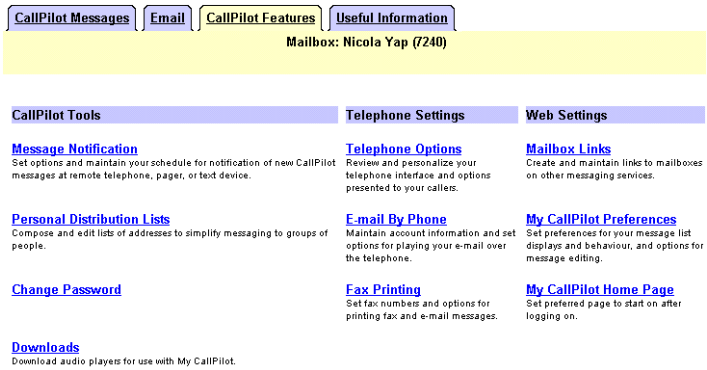
CallPilot Manager

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



CallPilot Manager

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



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.

Index

A

access rights 48
administration guides 13

B

Business Communications Manager, compatibility with desktop messaging 18, 32

C

CallPilot 150, compatibility with desktop messaging 18, 32
CallPilot address 28
CallPilot server
  domain name resolution 23
  FQDN, determining 22
  preparing to configure 25
CallPilot user identifier 29
Challenge-Response authentication 26
compatibility, messaging servers 18
configuring
  CallPilot server 25
  IMAP settings 27
  LDAP settings 27

D

data network security 27
desktop messaging
  access rights 48
  definition 10
  server requirements 32
  supported e-mail clients 33
DNS 23
domain name resolution 23
Domain Name System 23
downloading My CallPilot software 42

E

e-mail clients, supported 33

H

HOSTS file 23

I

Imaging for Windows 35
IMAP, definition 25
IMAP server, configuring 27
installation and configuration guides 13
installation checklists
  desktop messaging 19
installation, desktop messaging 18
Internet Explorer
  supported versions 41
Internet Message Access Protocol. *See* IMAP
IP address, configuring desktop messaging with 23

L

LDAP server, configuring 27
LDAP, definition 25
Lightweight Directory Access Protocol. *See* LDAP
Lotus Notes, supported versions 34

M

mailbox class 48
messaging servers, compatibility 18
Microsoft Outlook Express, supported versions 34
Microsoft Outlook, supported versions 34
Microsoft Windows, supported versions 33
migration guides 12
My CallPilot 48
  installation, testing 45
  installing 44
  operating systems, supported 41
  software requirements 42
  software, downloading 42
  web browser requirements 41
  web server requirements 40

N

Netscape, supported versions 34, 41
Network Message Service (NMS), SMTP/VPIM prefix 29
networking guides 14
Nortel Networks Partner Information Center (PIC) 12
Novell GroupWise, supported versions 34

O

online guides 16
online Help, accessing 16

P

Partner Information Center (PIC) 12
plain password authentication 26
planning guides 12
plugins, My CallPilot 42

Q

Qualcomm Eudora Email, supported versions 34

S

Secure Socket Layer. *See* SSL
security
  Challenge-Response authentication 26
  data network 27
  plain password authentication 26
  SSL encryption 26
security options 26
servers
  IMAP 25
  LDAP 25
  SMTP 25
Simple Mail Transfer Protocol. *See* SMTP
SMTP 25
SMTP/VPIM prefix 28
SSL, security options 26

T

technical support 17
troubleshooting
  reference documentation 15
  technical support 17

U

uninstalling
previous Web Messaging versions 43
Useful Information, configuring 57
user guides 15

W

web browsers, supported
My CallPilot 41
Web Messaging
previous versions, uninstalling 43
web server requirements
My CallPilot 40
Windows Messaging 4.0 34

CallPilot

Desktop Messaging and My CallPilot Installation Guide

Copyright © 2002 Nortel Networks, All Rights Reserved

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 the Meridian 1 and CallPilot 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.

Publication number:	555-7101-505
Product release:	2.0
Document release:	Standard
Date:	September 2002

NORTEL NETWORKS™