CallPilot End-User Installation Instructions

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Administrator's Overview

Administrators can use this file to provide users with instructions for installing CallPilot desktop messaging.

Information included in this document

This document explains

- how to install desktop messaging
- how to configure supported Internet mail clients (Outlook Express, Netscape Mail, Eudora)

By default, the desktop messaging installation program automatically configures groupware clients (Outlook, GroupWise, Notes). For additional information about desktop messaging client configuration, refer to the *Desktop Messaging and My CallPilot Administration Guide* (NTP 555-7101-503) and the desktop messaging online Help.

How to use this document

To ensure that installation runs smoothly follow these steps:

1. Customize this file (readme.rtf) by adding or removing information as necessary.
2. Post the customized file on your network where users can download it.
3. Customize installation for users by running inisetup.exe. Follow the instructions for setting installation defaults in the *Desktop Messaging and My CallPilot Installation Guide* (NTP 555-7101-505).
4. Once users install desktop messaging successfully, refer them to the online Help and the desktop messaging user guides for information about using desktop messaging.

Administrator access requirements for Windows 2002, Windows NT and Windows XP

For Windows 2000, Windows NT, and Windows XP, administrator privileges are required to install the Nortel Networks fax printer driver. By specifying the administrator user name and password, users without administrator privileges can install the fax printer driver.

- If all computers for users without administrator privileges are set up with the same administrator user name and password, you can specify the administrator logon information during setup initialization. The desktop messaging installation program automatically uses the logon information to install the fax printer driver if the user does not have administrator privileges.
- If the administrator user name and password are unique for each computer, the administrator user name and password must be specified during desktop messaging installation if the user does not have administrator privileges.

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Preparing for desktop messaging Installation

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Administrator

Ensure that you provide the required server settings to users if you did not set installation defaults for desktop messaging, or if your users are installing desktop messaging for Internet mail clients.

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Information you need

- the location of the desktop messaging installation program (**setup.exe**)
- your CallPilot mailbox number
- CallPilot server settings information:
  - the fully qualified domain name (FQDN) **OR** the CLAN IP address of the CallPilot server
  - the SMTP/VPIM prefix of the local CallPilot server
  - the CallPilot LDAP search base
  - the My CallPilot URL

The FQDN, SMTP/VPIM prefix, and mailbox number are used to create your CallPilot address. The example below shows the format of a CallPilot address.

16138887002@na42349.us.nortel.com

1613888	the SMTP/VPIM prefix used to identify your site
7002	your CallPilot mailbox number
16138887002	your CallPilot user identifier
na42349.us.nortel.com	the CallPilot server FQDN

Note: If you are using an Internet mail client to access CallPilot (Outlook Express, Netscape Mail, Eudora Email), ensure that you read the "Before you begin" information in the **Desktop messaging Internet client** configuration section to correctly configure desktop messaging with the information listed above.

Additional requirements

- **Novell GroupWise** - To use desktop messaging for GroupWise or Outlook, Windows Messaging 4.0 must be installed. If you are prompted to install Windows Messaging during GroupWise installation, 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** - To view CallPilot fax messages in the CallPilot custom form, Imaging for Windows must be installed. If Imaging for Windows is not installed, you can install it from the Microsoft Windows CD except in the case of Windows XP. Users of Windows XP will double click the fax item to open the TIF file in the default fax viewer.

To verify whether Imaging for Windows is installed (Windows 95, 98, NT, 2000 computer)

1. Open the Windows Control Panel.
2. Double-click **Add/Remove Programs**.
3. Click the **Windows Setup** tab.
4. Select Accessories, and then click **Details…** .
5. Scroll down the list and make sure that **Imaging** is checked.

Imaging for Windows is included on the Windows OS CD except for Windows XP.

Notes:

- Imaging for Windows is installed by default on Window 95B, Windows 98, Windows NT, and Windows 2000 operating systems. Microsoft does not provide Imaging for Windows on Windows XP.
- Desktop messaging does not support the imaging software included with 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 this fax driver.
- Imaging for Windows for Windows XP can purchased from www.eistream.com .
- Imaging for Windows is not required by CallPilot software.

Installing desktop messaging

To install desktop messaging

1. Close all Windows applications that are running.
2. From the Windows Start menu, click **Run**.
3. Type the path of the setup.exe file.
   If you do not know the path of the file, click **Browse** and use Network Neighborhood to go to the appropriate drive and folder where the setup.exe file is located. Select the **setup.exe** file and click **Open**.
4. Click **OK**. The setup program starts and the Welcome page appears.
5. Click **Next** to continue the installation and follow the prompts. For information about a specific option, refer to the online Help.

You can use the Nortel Networks Fax driver after a desktop messaging installation to create fax messages. See the following sections for details about configuring your e-mail client.

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Administrator
The sections below describe how to configure supported Internet mail clients for use with desktop messaging.
Delete the sections which do not apply to your site or users.
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Desktop messaging groupware client configuration

If you installed one of the desktop messaging clients listed below, the installation program automatically configured your e-mail program. You can start using desktop messaging without further configuration.

- Desktop messaging for Microsoft Outlook
- Desktop messaging for Novell GroupWise
- Desktop messaging for Lotus Notes

Desktop messaging Internet client configuration

If you installed **Desktop messaging for Internet Mail Clients**, you must manually configure your e-mail software for desktop messaging. Desktop messaging for Internet Mail Clients supports the following e-mail clients:

- Microsoft Outlook Express 5 or 6
- Microsoft Outlook
  - Microsoft Outlook 2002 (if you retrieve e-mail from an IMAP server)
  - Microsoft Outlook 98 or 2000 in Internet mail mode
- Netscape Mail 6.2x or later
- Eudora Email 5.x

Before you begin

For all Internet mail clients, you must specify the information listed below. You can obtain the components of your CallPilot address from CallPilot Player. Choose View Options. Click the General tab to view the mailbox and server settings.

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

User name
The name that uniquely identifies your mailbox.
Use your CallPilot user identifier (the portion of your CallPilot address before the '@' sign).

Text settings
Ensure that messages you send from your CallPilot mailbox are in plain text format. Ensure that your e-mail client is configured to send messages in plain text format.

Encryption settings
If your CallPilot server supports SSL encryption, you can enable SSL encryption in your e-mail client to increase the security of your messages. Note that SSL cannot be used with LDAP from an IMAP client (Outlook Express, Outlook in Internet mode, Netscape Mail, Eudora).

IMAP server name
The mail server for incoming mail.
Use the CallPilot server FQDN.

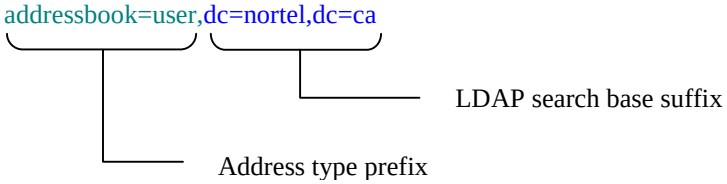
SMTP server name
The server for outgoing mail.
Use the CallPilot server FQDN.

LDAP server name
The directory server that contains the CallPilot Address Book.
Use the CallPilot server FQDN

LDAP user name
The name that uniquely identifies you to the LDAP server.
Enter your LDAP User Name as mail=<CallPilot user identifier>@<CallPilot server FQDN>,<CallPilot LDAP search base>. For example, the LDAP User name for the user on page 2 would be mail=16138887002@na42349.us.nortel.com,dc=nortel,dc=ca.

LDAP search base
The criteria used to locate CallPilot addresses on the LDAP server.
Use the search base configured on your LDAP server with the prefix that identifies the type of addresses you want to access. When you use an Internet mail client with a CallPilot 2.0 server, the search base includes both a prefix and a suffix.

Example



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

Prefix for individual recipients - addressbook=user
Prefix for individual recipients and shared distribution lists - addressbook=userSDL
Prefix for shared distribution lists (SDLs) - addressbook=SDL
Prefix for personal distribution lists (PDLs) - addressbook=PDL
Prefix for broadcast distribution lists (BDLs) - addressbook=BDL

Configuring Outlook 2002 as an IMAP client

Note: You only need to follow the instructions below if you are using Outlook with a standard IMAP e-mail server. If you are using Outlook with an Exchange server, desktop messaging automatically configures Outlook.

To configure your CallPilot account settings

1. Choose **Tools > E-mail Accounts**. The E-mail Accounts wizard appears.
2. Select **Add-a new e-mail account**, and then click **Next**. The E-mail Servers page appears.
3. Select **IMAP**, and then click **Next**. The Internet E-mail Settings (IMAP) page appears.
4. Specify the following settings for your CallPilot mailbox:
   - **User Information**—Type your name and CallPilot address in the boxes. Your address should be in the form:

     <SMTP/VPIM prefix><CallPilot mailbox number>@<CallPilot server FQDN>

   - **Logon Information**—Type your CallPilot mailbox number and password in the boxes. **Note:** Do not check the Log on using Secure Password Authentication (SPA) box.
   - **Server Information**—Type the CallPilot FQDN in both boxes.
5. Click **Next**. A confirmation page appears.
6. Click **Finish**.

To configure access to the CallPilot Address Book

1. Choose **Tools > E-mail Accounts**. The E-mail Accounts wizard appears.
2. Select **Add a new directory or address book**, and then click **Next**.
3. Choose **Internet Directory Service** (LDAP) and then click **Next**.
4. In the **Server Name** box, type the CallPilot FQDN.
   Perform the following steps:
   - In the **Server Name box**, type the CallPilot FQDN.
   - If the CallPilot Address Book requires you to log on, check the **This server requires me to log on** box and type your LDAP User Name and password in the **User name** and **Password** boxes.
     You must log on to the CallPilot Address Book to view distribution list addresses.
5. Click **More Options**. The Microsoft LDAP Directory dialog box appears.
6. Click the **Connection** tab.
7. In the **Display Name** box, type a descriptive name for the address book (for example “CallPilot Address Book”).
8. Click the **Search** tab.
9. If your network connection is slow, you can increase the timeout value and reduce the maximum number of entries in the **Server Settings** section.
10. Type the appropriate CallPilot search base in the **Search base** box, and then click **OK**.

11. Click **Next**. A confirmation page appears.
12. Click **Finish**.

To configure text formatting

1. Choose **Tools** > **Options**.
2. Click the **Mail Format** tab.
3. In the **Message Format** section, select **Plain Text**.
4. Click **OK**.

To test your desktop messaging account

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

Configuring Outlook Express, Outlook 2000, or Outlook 98

Note: For **Microsoft Outlook configuration**, you only need to follow the instructions below if you are using Outlook with a standard IMAP e-mail server. If you are using Outlook with an Exchange server (in corporate mode), desktop messaging automatically configures Outlook.

To configure your CallPilot account settings

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

   <SMTP/VPIM prefix><CallPilot mailbox number>@<CallPilot server FQDN>

7. Click **Next**. The E-mail Server Names page appears.
8. Select **IMAP** as the incoming mail server type.
9. In the **Incoming mail** and **Outgoing mail** boxes, type the CallPilot FQDN, if it does not automatically appear.
10. Click **Next**. The Internet Mail Logon page appears with your IMAP account name filled in.
11. Type your CallPilot mailbox password in the **Password box**.
    Note: Do not check the Log on using Secure Password Authentication (SPA) box.
12. Click **Next**. The Friendly Name page appears.
13. Type a name to identify the CallPilot IMAP account in the **Internet mail account name** box.
    Example: You can type in your first name or full name, or you can type a name that identifies the purpose of the account.
14. Click **Next**. The Congratulations page appears.
15. Click **Finish**. The Outlook Express window appears.
16. Select **Yes** to download the folder list for the IMAP account that you just created. Select **No** if you do not want to download the folder list at this time
17. To make additional changes to your account settings, follow these steps:
    a. Choose **Tools** > **Accounts**.
    b. On the Mail tab, select your CallPilot account and click **Properties**.

To configure access to the CallPilot Address Book

1. Choose **Tools** > **Accounts**.

2. Click the **Directory Service** tab.
3. Select **Add** and click the **Directory Service**. The Internet Connection Wizard starts.
4. On the Internet Directory Server Name page, specify the following:
   - Type the CallPilot server FQDN in the **Internet directory (LDAP server)** box.
   - If the CallPilot Address Book requires you to log on, check the **My LDAP server requires me to log on** box and type your LDAP User Name and password in the **User name** and **Password** boxes.

   Note: You must log on to the CallPilot Address Book to view distribution list addresses.
5. Click **Next**. The Check E-mail Addresses page appears.
6. To check for addresses in the CallPilot LDAP directory when addressing messages, click **Yes**.
7. Click **Next**. The Congratulations page appears.
8. Click **Finish**. The Internet Accounts page appears.
9. Click **Properties**. The LDAP Server Properties dialog box appears.
10. Click the **Advanced** tab.
11. Specify the required options.
    - **Server Port Number section**— Change the port number to 389.
    - **Search section**
      - Type the LDAP search base in the Search base box.
      - If your network connection is slow, move the Search timeout slider to increase the timeout period.
      - To reduce search times, specify the number of entries to return after an address book search in the Maximum number of matches to return box.
      - Type the search base in the **Search base** box.
12. Click **OK**.
13. To modify the search order, click **Set Order**. In the Directory Services Order dialog box, modify the search order as required using the Move Up and Move Down buttons.
14. Click **OK** to save your changes.
15. Click **Close**.

To configure text formatting

1. In Outlook Express, do the following:
   a) Choose **Tools** > **Options**.
   b) Click the **Send** tab. The Options dialog box appears.
   c) In the Mail sending format section, choose **Plain Text**.
   d) Click **Plain Text Settings**. The Plain Text Settings dialog box appears.
   e) In the Message format section, choose **MIME**. In the **Encode text using** list, select **None**.
   f) Click **OK** to close the Plain Text Settings dialog box.
   g) Click **OK**.
2. In Outlook 98 or 2000, do the following:
   a) Choose **Tools** > **Options**.
   b) Click the **Mail Format** tab.
   c) In the **Send in this message format** list, select **Plain Text**.
   d) Click **OK**.
3. If you add addresses from the CallPilot LDAP directory to your Outlook Express personal address book, check the following setting:
   a) In the personal address book, right-click the recipient name. From the pop-up menu, click **Properties**. The Properties dialog box appears.
   a) Click the **Name** tab.

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

To test your desktop messaging account

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

Configuring Netscape Mail

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

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

Defining outgoing mail server settings in Netscape

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

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

Feature limitations

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

To define your CallPilot mailbox settings

1. From the main Netscape window, choose **Tasks > Mail & Newsgroups**. The Mail & Newsgroups window appears.
2. Choose **File > New > Account**. The Account Wizard appears.
3. Select ISP or email provider, and then click **Next**.
4. On the Identify page, type your name and CallPilot address in the boxes, and then click **Next**. Your address should be in the form:

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

5. On the Server Information page, select **IMAP**.
6. In the **Incoming Server** section, type the CallPilot FQDN in the **Server Name** box.
7. In the **Outgoing Server** section, type the CallPilot FQDN in the **Server Name** box, and then click **Next**.

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

Notes:

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

8. On the User Name page, type your CallPilot user identifier and then click **Next**.
9. On the **Account Name** page, type a name for your CallPilot mailbox to help you to identify it in Netscape Mail, and then click **Next**.
10. On the Congratulations page, verify your CallPilot mailbox information and then click **Finish**.

To specify CallPilot server as the outgoing mail server

1. From the main Netscape window, choose **Tasks > Mail & Newsgroups**. The Mail & Newsgroups window appears.
2. Choose **Edit > Mail & Newsgroups Account Settings**. The Mail & Newsgroups Account Settings window appears.
3. In the account list, select **Outgoing Server (SMTP)**.
4. Click **Advanced**. The Advanced Outgoing Server (SMTP) window appears.
5. Click **Add**. A new window appears.
6. Specify the following server settings:
   a. In the **Server Name** box, type the CallPilot server FQDN.
   b. Ensure that the **User name and password** check box is not selected.
   c. In the **Use Secure connection (SSL)** section, select **When Available**.
   d. Click **OK** to save your changes.
   e. Click **OK** to accept the list of outgoing servers.
7. In the account list, select your CallPilot account.
8 On the Account Settings page, click **Advanced**. The Advanced Account settings dialog box appears.
9. In the Server list, select the CallPilot server.
10. Click **OK**.

To configure text formatting

1. From the main Netscape window, choose **Edit > Preferences**. The Preferences window appears.
2. In the Mail & Newsgroups category, select **Send Format**.
3. Select **Convert the message to plain text**.
4. Click **OK**.

To configure access to the CallPilot Address Book

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

1. From the main Netscape window, choose **Tasks > Mail & Newsgroups**. The Mail & Newsgroups window appears.
2. Choose **Edit > Preferences**. The Preferences window appears.
3. In the Mail & Newsgroups category, select **Addressing**.
4. In the Address Autocompletion section, check both the **Local Address Books** and **Directory Server** options.

5. Click **Edit Directories**. The LDAP Directory Servers window appears.
6. Click **Add**. The Directory Server Properties dialog box appears.
7. Specify the connection information for the CallPilot Address Book:
   a. In the **Name** box, type a name for the CallPilot Address Book to help you to identify it.
   b. In the **Hostname** box, type the CallPilot server FQDN.
   c. In the **Base DN** box, type the LDAP search base for viewing individual addresses only. **addressbook=user, <search base suffix>**
8. Click **OK**, and then exit the LDAP Directory Servers window.
9. Choose **Edit** > **Mail & Newsgroups Account Settings**. The Mail & Newsgroups Account Settings window appears.
10. Expand your mail account list and then select **Addressing**.
11. Select **Use a different LDAP server**, and then select the CallPilot Address Book (the server you added in step 7) from the server list.
12. Click **OK.**

To test your desktop messaging account

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

Configuring Eudora Email

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

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

To define your CallPilot mailbox settings

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

   <SMTP/VPIM prefix><CallPilot mailbox number>@<CallPilot server FQDN>

6. Click **Next**. On the Login Name page, verify that the **Logon Name** box contains your CallPilot user identifier.
7. Click **Next**. On the Incoming Email Server page, verify that the **Incoming Server** box contains the FQDN of the CallPilot server.
8. Choose the **IMAP** server type.
9. Click **Next**. On the IMAP Location Prefix page, ensure that the **Location Prefix** box is blank.
10. Click **Next**. On the Outgoing Email Server page, verify that the **Outgoing Server** box contains the FQDN of the CallPilot server.
11. Click **Next**. On the Success page, click Finish. Eudora prompts you for your CallPilot

password.

12. Type your CallPilot password and click **OK**. Eudora connects to your CallPilot mailbox. When the connection is made, the Eudora application will open.
13. Choose **Tools > Options**. The Options dialog box appears.
14. In the Category list, select **Checking Mail**.
15. In the **Check for Mail every___minutes** box, specify how often you want Eudora to check for new messages. Eudora does not provide immediate notification of new messages, so specify a low value to provide more frequent message checking. A value of 0 means the user will check for new messages manually.
16. In the Category list, select **Attachments**.
17. In the Encoding method section, choose **MIME**.
18. Click **OK** to save your changes.

To configure text formatting

1. Choose **Tools > Options**. The Options dialog box appears.
2. In the Category list, select **Styled Text**.
3. Select **Send plain text only**.
4. Click **OK**.

To configure access to the CallPilot Address Book

1. Choose **Tools > Directory Services**. The Directory Services window appears:
2. In the Protocols box, select **LDAP**, and then click **New Database**. The Modify Database dialog box appears.
3. On the Network tab, type a descriptive name for the CallPilot directory service in the first box, and then type the FQDN of the CallPilot server in the **Host Name** box.
4. Click the **Search Options** tab.
5. If your network is slow, move the slide bar under Search timeout toward Long to increase the timeout.
6. Type the search base for the CallPilot directory in the **Search Base** box.
7. Click **OK** to close the Modify Database dialog box.
8. Close the Directory Services window.

To test your desktop messaging account

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