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CallPilot

Desktop Messaging and My CallPilot Installation Guide

Product release 2.5 Standard 1.0 October 2003

NORTEL NETWORKS™

CallPilot

Desktop Messaging and My CallPilot Installation Guide

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Section A: Desktop Messaging: Getting started

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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. Desktop Messaging provides a single graphical interface to manage CallPilot voice, fax, text, and 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 2.5 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)
learning 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 received with your system. The documents are also available from the following sources:

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

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

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

Planning and migration guides

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

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

Installation and configuration guides

The guides listed here describe how to install the following:

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

Administration guides

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

Document titles	NTP number
Administrator's Guide	555-7101-301
Reporter Guide	555-7101-310
Application Builder Guide	555-7101-325
Desktop Messaging and My CallPilot Administration Guide	555-7101-503

Networking guides

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

Document titles	CallPilot release	NTP number
Networking Enhancements Guide	2.5	555-7101-507
Networking Planning Guide	2.5	555-7101-100
NMS Implementation and Administration Guide (for systems employing Meridian 1 or Succession 1000 switches only)	2.5	555-7101-302

Document titles	CallPilot release	NTP number
AMIS Networking Implementation and Administration Guide	2.5	555-7101-303
Enterprise Networking Implementation and Administration Guide	2.5	555-7101-304
Integrated AMIS Networking Implementation and Administration Guide	2.5	555-7101-305
VPIM Implementation and Administration Guide	2.5	555-7101-306

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

End user guides

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

Document titles
Unified Messaging What's New Card
Unified Messaging Quick Reference Card
Unified Messaging Wallet Card
Menu Interface Quick Reference Card
Alternate Command Interface Quick Reference Card
Command Comparison Cards
Multimedia Messaging User Guide

Document titles
Speech Activated Messaging User Guide
Desktop Messaging User Guides
My CallPilot User Guide

Troubleshooting

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

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

You require a user ID and password to access the PIC. If you do not have a PIC account, click Register to request an account. Up to 72 hours may be required 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 obtain any required assistance with your system.

Contacting Nortel Networks

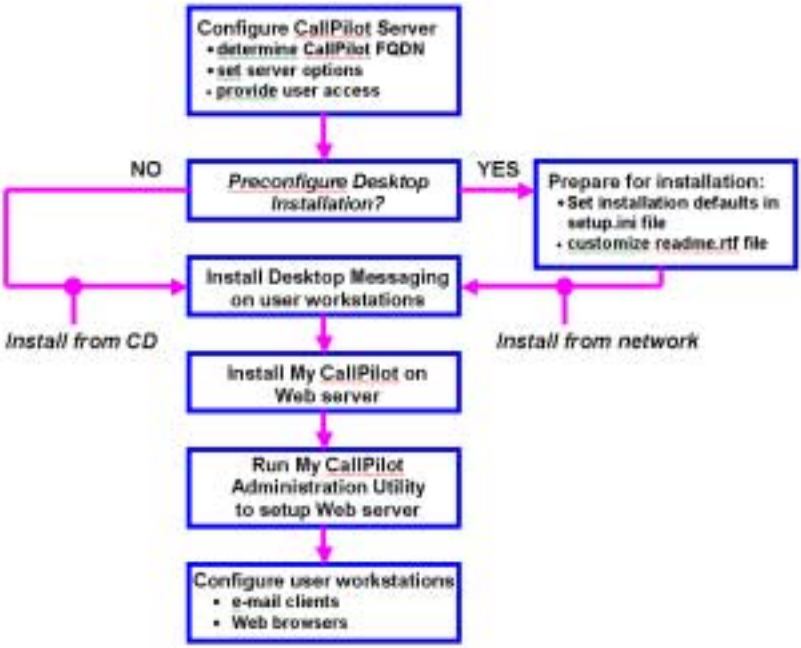
If you have comments or suggestions for improving CallPilot and its documentation, contact Nortel Networks at the following web site address:

http://www.nortelnetworks.com/callpilot_feedback

Installation overview

Installation process

Use the following diagrams with the Pre-Installation checklist on page 18 to help you prepare for Desktop Messaging and My CallPilot installation:



Compatibility

CallPilot Desktop Messaging 2.5 works with CallPilot 2.0x and CallPilot 2.5 servers. 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.

Note:

If the user attempts to install the Fax Printer Driver and/or Fax Batch Driver, the fax driver installation may fail after the user is prompted for the administrator user name and password. This failure occurs under the following conditions:

❑ Client PC is running Windows 2000 with SP4 or later

❑ User performing the installation does not have administrator privileges

To resolve the problem, the system administrator must alter the security policy of the user performing the installation to include the user right "Impersonate a client after authentication". Refer to Microsoft Knowledge Base article Q821546 for more information. Refer also to “User workstation requirements,” on page 35 for supported operating system requirements and “E-mail client requirements,” on page 35 for supported Groupware clients.

Section B: Configuring the CallPilot Server

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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 screen 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 18 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 and My CallPilot clients to log on to CallPilot and retrieve messages.
- **LDAP server**—Lightweight Directory Access Protocol (LDAP) enables Desktop Messaging and My CallPilot 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 and My CallPilot clients to send messages.

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

Additional server configuration

CallPilot 2.5 also enables you to access a third-party LDAP address book for use with Desktop Messaging. You can only use a third-party LDAP server if you are using a Desktop Messaging groupware client (Outlook, GroupWise, or Lotus Notes).

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

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

Security options

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

- **Secure socket layer (SSL) encryption**—SSL encrypts data communication between two end points on a network. It is normally used in environments that require additional security (for example, accessing a mailbox using a public Internet service provider).
- **Challenge-Response authentication**—An authentication method that uses the MD5 algorithm to transmit the CallPilot mailbox number and password in an encoded format to the CallPilot server.
- **Plain Password authentication**—An authentication method that uses the mailbox number and password, transmitted in clear text (unencrypted) over the network.

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

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

To configure IMAP and LDAP settings

1. In CallPilot Manager, choose Messaging>Internet Mail Clients.
2. To allow clients to access LDAP with a high level of security, check the box Enable LDAP with SSL port. SSL for LDAP must also be enabled by the client if a high level of security is desired.
3. To set up the LDAP search base:
   a. From CallPilot Manager Home select Configuration Wizard.
   b. Select Next from the Welcome page.
   c. Select the CallPilot Individual Feature Configuration (Express Mode) radio button. Select Next.
   d. Select the Server Information check box. Select Next.
   e. Scroll to the LDAP search base and enter search base.

      For example dc=nortel,dc=ca
      (Note: there is no space after the comma)
4. In the IMAP section, check the Enable IMAP box to turn on IMAP service.
5. Choose the required IMAP options.

   For details about each option, refer to the online Help.
6. Click Save to save your changes.

   Note: If you enable SSL, ensure that you instruct users to enable SSL in the Desktop Messaging clients.

To set SMTP options

1. In CallPilot Manager, choose Messaging>Message Delivery Configuration.
2. In the SMTP/VPIM section, check Incoming SMTP/VPIM to enable access to SMTP service from Desktop Messaging clients.
3. Click Security Modes for SMTP sessions, and then specify the required security options.
4. Click Save.

Defining addressing prefixes

Introduction

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

VPIM network shortcut

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

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

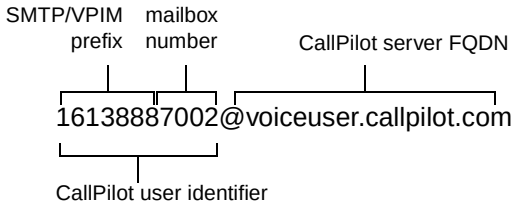
Open VPIM shortcut

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

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

Setting the SMTP/VPIM prefix

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



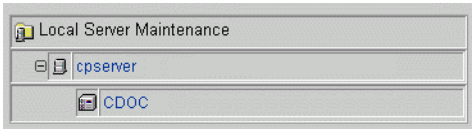
In a Network Message Service (NMS) system, the SMTP/VPIM prefix allows two different NMS sites to have the same mailbox number.

	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

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Desktop Messaging requirements

Servers

You must install CallPilot with a keycode that enables Desktop Messaging features. CallPilot Desktop Messaging 2.5 works with CallPilot 2.0x and CallPilot 2.5 servers.

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 minimum software and hardware for Desktop Messaging:

Windows systems:

- Windows 98 SE, Windows 2000 Professional, or 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 connected to your computer for recording voice messages
- For Desktop Messaging: a LAN (Ethernet) connection to the CallPilot server

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

Macintosh systems (for Macintosh My CallPilot web client only):

- PowerPC 603, 604, G3 or compatible processor
- Apple Macintosh OS 9.0, 9.1

  Note: Macintosh OS 10 is not supported.
- TCP/IP network connection of at least 28.8 kbits/s
- Speakers for playing messages on the computer
- Microphone for recording messages from the computer

  Note: Many PC microphones do not work on PowerPC computers. A PlainTalk microphone should be used.

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 2.5 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 following table indicates the recommended SR for proper functioning with Desktop Messaging:

Windows Groupware clients	Internet clients
■ Microsoft Outlook 98 or 2000 (SR-2) in Corporate mode ■ Microsoft Outlook 2002 (SP-2) ■ Novell GroupWise 6.0x and 6.5 ■ Lotus Notes 5.x and 6.0	■ Microsoft Outlook Express 5.0 or 6.x ■ Microsoft Outlook 98 or 2000 (SR-2) in Internet mail mode ■ Microsoft Outlook 2002 (SP-2) ■ Netscape Mail 6.2x and 7.0 ■ Qualcomm Eudora E-mail 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 article Q319820 for additional Outlook 2002 fixes.
- **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**—Microsoft Windows Imaging is no longer required in CallPilot 2.5. CallPilot desktop software will install fax viewing software for the Microsoft Outlook, Novell GroupWise and Lotus Notes desktop clients. Software used to send faxes will also be installed.

My CallPilot and the IMAP client will rely on whichever application is associated with *.tif files to view faxes. Note that Imaging for Windows is installed by default on Windows 98 and Windows 2000 operating systems. However, Microsoft does not provide Imaging for Windows on Windows XP.

Refer also to the Note on page 19 regarding fax driver installation.

Installing Desktop Messaging on end-user workstations

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 34.

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 of Desktop Messaging without removing the currently installed software. Note however that version 1.07 is not compatible with CallPilot 2.0x/2.5 servers. It may be upgraded by either uninstalling the 1.07 version first and then installing the newer version, or by installing the newer version over the 1.07 version.

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. Refer to Section D: "Using the CallPilot Desktop Messaging Setup Initialization program," on page 59.
- **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. Refer to Section D: “Using the CallPilot Desktop Messaging Setup Initialization program,” on page 59.
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.

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.

Installing Desktop Messaging in a Citrix Thin Client environment

The system administrator of a Citrix Thin Client environment must install and configure CallPilot Desktop Messaging on the Windows Terminal Server before users can access it. CallPilot should only be installed on the Windows Terminal Server; do not install CallPilot on the client computer.

After the installation process is complete, refer to the *Desktop Messaging and My CallPilot Administration Guide* for information on administering and configuring end users in the Citrix Thin Client environment.

Supported Platforms

Desktop Messaging in the Citrix Thin Client environment is supported on CallPilot 2.0x and 2.5 platforms.

The Desktop Messaging client supports the Windows 2000 Server, Windows 2000 Advanced Server, and Windows 2000 Datacenter Server running Citrix Metaframe 1.8 or Citrix Metaframe XP.

Citrix Thin Clients must be running Windows 98SE, Windows 2000, or Windows XP.

Installing CallPilot Desktop Messaging on the Windows Terminal Server

Installing CallPilot Desktop Messaging in a Citrix Thin Client environment is a straight forward process. It is nearly identical to installation in a standard desktop client environment. Deviations from the standard environment are detailed in this section.

The common desktop exceptions to the installation process for a standard environment include:

- The installer routine automatically hides the installation screens for *Mailbox Number* and *LDAP Server Account*. These screens are not applicable to the Windows Terminal Server.
- **For Microsoft Outlook and Novell Groupwise:** The installer automatically disables the *Update default mail profile* control. This control is not applicable to the Windows Terminal Server.
- **For Lotus Notes:** The installer automatically disables the *Update Lotus Notes mail database* and *Update Lotus Notes Personal Address Book* controls. These controls are not applicable to the Windows Terminal Server.

  To update the users mail databases, the Lotus Notes/Domino server administrator must run the LNSERVER.EXE installation program on the Lotus Notes/Domino Server. The administrator can then use the installed utility application to update selected users mail databases with CallPilot design elements.

  To enable the CallPilot address book, the Lotus Notes/Domino Server administrator must populate and maintain the CallPilot Public Address book on the server. The administrator may choose to call NMLNADBK.EXE as a scheduled task to automate the CallPilot Public Address Book update.

Preparing the Windows Terminal Server for My CallPilot

Users of My CallPilot are not required to install anything on their client computer. However, they are given the option of downloading the CallPilot audio player if My CallPilot detects it is not present.

The system administrator should install CallPilot Desktop Messaging for Internet Mail Clients (Audio Player) on the Windows Terminal Server. This avoids any detection problems on the user's end and guarantees that all My CallPilot users have access to the audio player.

Note: Macintosh users of My CallPilot are not supported.



Configuring CallPilot in a Citrix Thin Client Environment

When publishing applications on the Windows Terminal Server, the system administrator should manually update the program's command line. This is required to provide access to the Nortel Fax / Nortel Fax Batch printers.

This step may be skipped if access to the Nortel Fax / Nortel Fax Batch printers is not required. This step may also be skipped when publishing the Window's desktop.

To provide access to the Nortel Fax / Nortel Fax Batch printers:

1. Add double quotes around the original command line (if not already present).

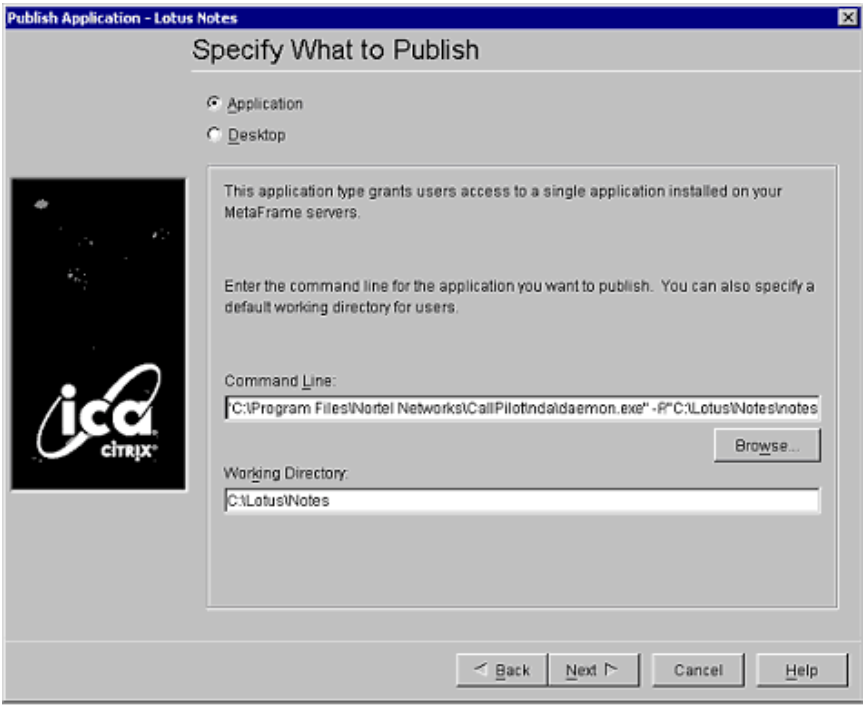
   Example: “C:\Lotus\Notes\notes.exe”

2. Add the following text in front of the quoted command line for any application from which you wish to print (not just Lotus Notes):

   "C:\Program Files\Nortel Networks\CallPilot\nda\daemon" -P (or in some cases -A)

The command line should now read:

Example: "C:\Program Files\Nortel Networks\CallPilot\nda\daemon" -A“C:\Lotus\Notes\notes.exe”
(the use of -A in this example, as opposed to -P, is explained below)



Note: The default CallPilot installation location is "C:\Program Files\Nortel Networks\CallPilot". However, this may have been altered by the system administrator when CallPilot was installed.

The -P option should work for most applications. However, if an application still does not work with the Nortel Fax / Nortel Fax Batch printers, use the option -A instead of -P. Lotus Notes requires -A instead of -P.

The -P and -A options are both used by daemon.exe to monitor the original application for print requests. The -P option instructs daemon.exe to only monitor the original application. The -A option instructs daemon.exe to monitor the original application as well as any secondary applications created by the original. The -A option is more CPU intensive and should only be used when the -P option does not work.

CPTrace

CPTrace is a utility used to gather debug information. It is automatically installed on the client's PC but is disabled when installing CallPilot in the Citrix Thin Client environment. While CPTrace is quite fast, it can impact the overall Windows Terminal Server performance.

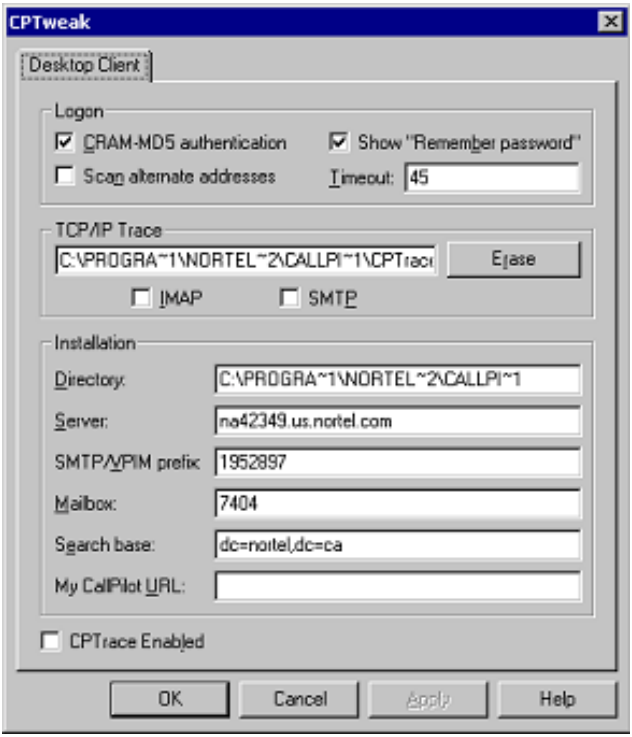
CPTrace can be enabled by running CPTweak on the Windows Terminal Server.

To enable CPTrace, the system administrator should:

1. Ensure no users are running the CallPilot Desktop Messaging client.
2. Ensure that CPTrace is not already running on the Windows Terminal Server.

   Note: If you do not know where CPTrace has been installed, conduct a search for "CPTrace".

3 Run CPTrace on the Windows Terminal Server while pressing the CTRL and SHIFT keys. This opens the CPTweak window.



4 Check "CPTrace Enabled" and close the window. Tracing is now enabled.

To gather a trace in the Citrix Thin Client environment, CPTrace must be run from the client computer, not the Windows Terminal Server.

Once the necessary traces have been gathered, CPTrace should again be disabled on the Windows Terminal Server. To do this:

1 Run CPTweak again on the Windows Terminal Server.

2 Uncheck the "CPTrace Enabled" item.

3 Close the window.

Tracing is now disabled.

My CallPilot requirements

Servers

Both My CallPilot 2.0x and 2.5 for Windows clients work well on either a CallPilot 2.0x or 2.5 server. Note however that support for the Macintosh Web Client requires My CallPilot 2.5, and this may be run on either a CallPilot 2.0x or 2.5 server.

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

You need approximately 50 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 authority.

My CallPilot requires either:

- a Windows NT 4.0 server with SP6a and Microsoft Internet Information Server (IIS) 4

or

- a Windows 2000 server with SP1 or SP2 and Microsoft Internet Information Server (IIS) 5.

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 E: “Controlling access to features,” on page 69.

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 clients require the same hardware as Desktop Messaging. For more details, see “User workstation requirements” on page 35.

Web browser requirements

My CallPilot supports the following web browsers:

- Microsoft Internet Explorer 5.x, 6.x
- Netscape 6.2x and 7.0

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	ImageMaker or equivalent software to 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 for Windows

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 My CallPilot from the IIS server
- user workstations have the required software for My CallPilot

For more information, see “My CallPilot requirements” on page 47.

To uninstall My CallPilot

If an earlier version of My CallPilot (also known as “Web Messaging” in early releases) is installed, you must uninstall it before installing your new My CallPilot software.

1. Shut down the IIS web server service.
2. In the Windows Control Panel, double-click Add/Remove Programs.
3. Select My CallPilot (or Web Messaging), and then click Add/Remove.
4. Click Yes to confirm that you want to remove the program.
5. Run the uninstall program.

   Result: The service starts and deletes the My 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 restart the computer and attempt to re-uninstall My CallPilot.

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.
2. Start Internet Explorer or Netscape.
3. Type the My CallPilot URL in the following format:

   http://<webservername>/<virtual_directory_name>

   Result: In a few seconds, the Logon page appears.
4. 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).

Installing the Macintosh My CallPilot Web Client

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
- user workstations have the required hardware and software for My CallPilot

  For more information, see “My CallPilot requirements” on page 47.

Mac My CallPilot Web Client Installation

1. Using your web browser, navigate to the My CallPilot web site, which is the virtual directory you created during installation.
2. Type the My CallPilot URL in the following format:

   http://<webservername>/<virtual_directory_name>

   Result: In a few seconds, the Logon page appears.
3. Log on to My CallPilot.
4. Download the MacPlayer_enu.sit file to your hard disk by clicking the CallPilot Player link in the Downloads page of My CallPilot:



5 If the browser does not automatically unstuff the archive, then double-click the MacPlayer_enu.sit file to decompress it into a folder called My CallPilot Web Client. When done, the following window is displayed:



6 Before running the Installer, double-click the Read-Me file for last-minute information and notices.

7 Run the AppleScript-based My CallPilot Client Installer applet. This script performs the following actions:

- Displays a dialog to inform you that it is running.
- Asks you where to install the CallPilot software.
- Copies the support AppleScript extensions ("Dialog Director" and "InternetConfig Commands") into the Scripting Additions folder of the System folder. This enables additional commands that are needed to complete the installation.
- Copies the CallPilot application, CallPilot Server Settings, and CallPilot Uninstaller into the selected location.
- Copies the CallPilot Fax and CallPilot Fax Spooler into the Extensions folder.
- Makes an alias of the CallPilot application and puts it into the Apple Menu Items folder.
- Adds file mappings for audio and fax into the Internet Config database.

The program informs you when installation is complete. You should then delete the installation folder.

8 Run the CallPilot Player application and configure your Preferences.

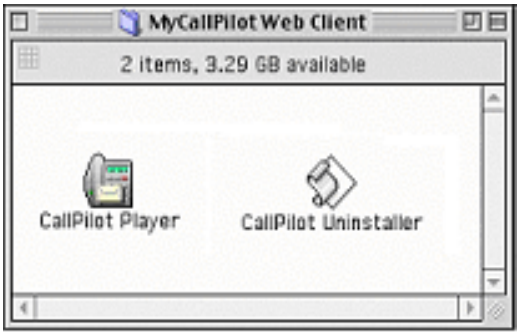


The default is: Macintosh Audio Device, with all settings checked.

Installation verification

Verify that installation was successful by performing the following:

1 Check that the CallPilot application was installed by locating and opening the folder that you specified during installation:



2 Verify that the CallPilot Fax driver was installed by opening the Chooser accessory and checking if the CallPilot Fax icon is displayed.

Uninstalling the My CallPilot Web Client

To uninstall the My CallPilot Web Client software, locate the installation folder and launch the CallPilot Uninstaller applet. This applet removes all of the My CallPilot Web Client software from your Macintosh.

Section D: Using the CallPilot Desktop Messaging Setup Initialization program

The system administrator is responsible for creating customized CallPilot Desktop Messaging installations. The CallPilot Desktop Messaging Setup Initialization program can expedite this process. While this is not a requirement for CallPilot installation, it does ease end-user installation by pre-filling many of the required fields in setup.exe. Note that this program can only be used for Windows Desktop Mesaging installations.

The CallPilot Desktop Messaging Setup Initialization program

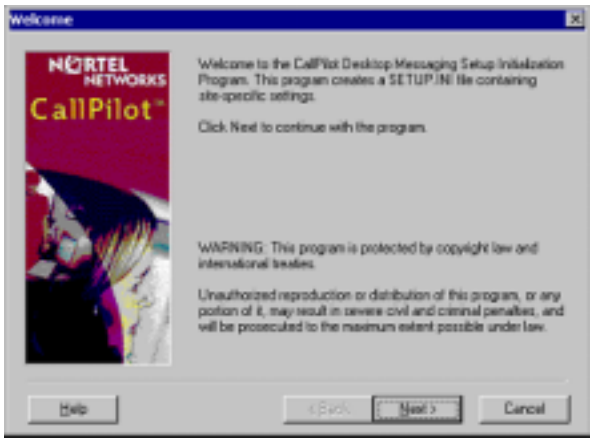
The CallPilot Desktop Messaging Setup Initialization program consists of a series of wizard screens that create a setup.ini file. While the system administrator could manually create or modify the setup.ini file, this program provides a GUI interface intended to simplify changes.



The following sections cover all the CallPilot Desktop Messaging Setup Initialization program screens.

Welcome

The Welcome screen provides legal information and informs the system administrator that this utility is used to customize CallPilot Desktop Messaging installations.



Language

The Language screen is used to set the default language that will be installed by Setup.exe.



E-Mail Client

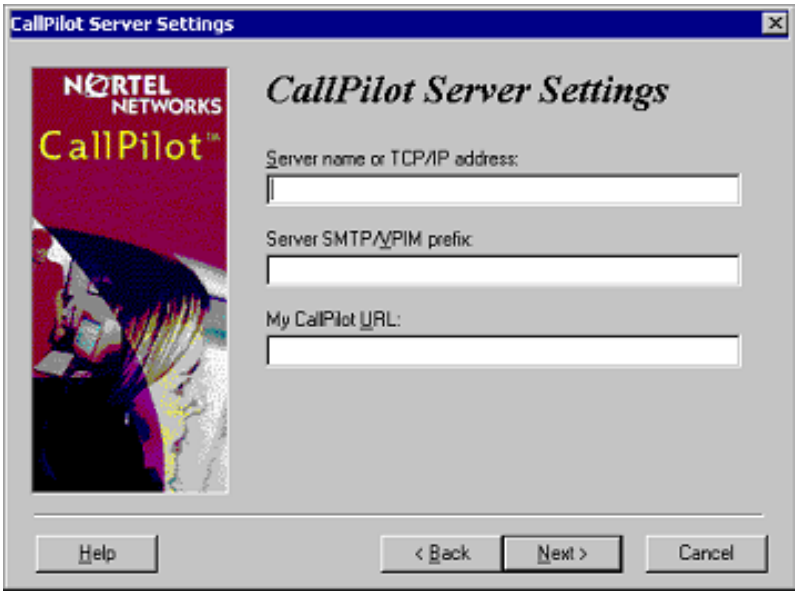
The E-Mail screen is used to select which E-Mail clients will be installed by Setup.exe.

Setup.exe allows the end-user to install E-Mail clients selected in the CallPilot Desktop Messaging Setup Initialization program. This provides a mechanism to "force install" the CallPilot Desktop Client regardless of which E-Mail client is actually present. This allows the system administrator to override Setup.exe's E-Mail client detection code and should be used in situations where Setup.exe fails to detect an installed E-Mail client.



CallPilot Server Settings

The CallPilot Server Settings screen is is used to set the FQDN or TCP/IP address of the CallPilot Server, the SMTP/VPIM prefix of the CallPilot Server, and the http address of the My CallPilot server.



LDAP Server Settings

The LDAP Server Settings screen allows the system administrator to point to a third party LDAP server (versus a CallPilot server), toggles between anonymous and authenticated logon, and sets the search base of the CallPilot Server.

If the LDAP Server is a CallPilot 2.0x server, there is no need to specify a search base. The search base is automatically updated when the CallPilot Desktop Client is run.



Fax Cover Pages

The Fax Cover Pages screen allows the system administrator to toggle between enabling and disabling cover pages on the CallPilot Desktop Client. It also allows the administrator to point all end-users to a shared network folder that contains cover pages for use by CallPilot Desktop Messaging. It should point to a network folder, not a local directory.



If the system administrator leaves the cover page folder empty, Setup.exe copies a default cover page to the user's computer. The system administrator can add additional cover pages to the user's computer by adding .TIF and .CVR files to the cvrpages folder. The cvrpages folder is located in the same directory as Setup.exe. All .TIF and .CVR files located in this folder are copied onto the user's computer by Setup.exe.

These cover page options are not related to cover page options that may or may not be maintained by the CallPilot Server and CallPilot Manager.

Security

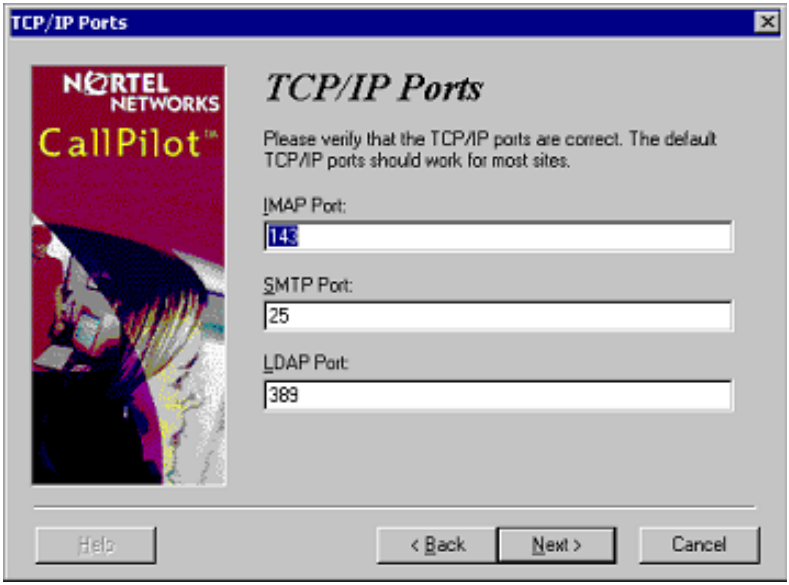
The Security screen allows the system administrator to enable SSL for all CallPilot Server connections, toggle the voice block feature, and disable the "Remember password" checkbox. Voice block prevents users from saving or forwarding voice messages to non-CallPilot recipients.

This screen also contains the option to generate password files for fax driver installation under non-administrator accounts.



TCP/IP Ports

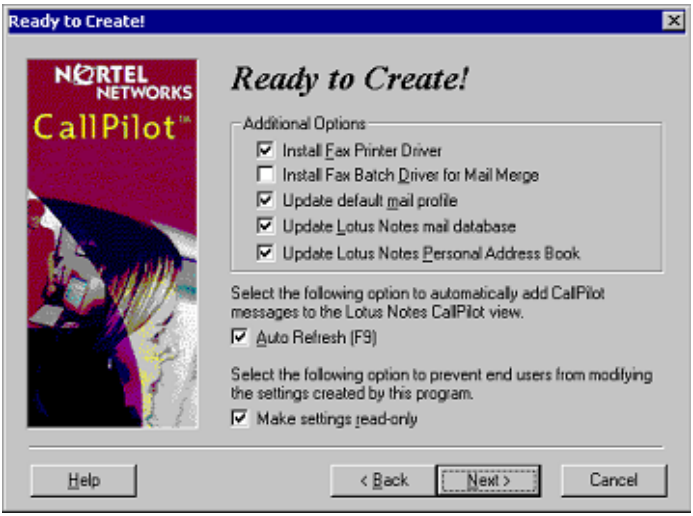
The TCP/IP Ports screen allows the system administrator to override the default ports for connecting to the CallPilot Server. Unless directed by Nortel Networks support, all ports should be left unchanged.



Ready to Create

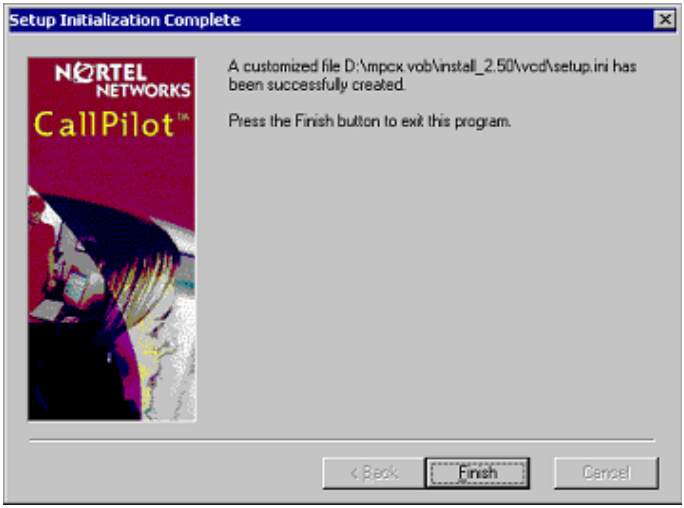
The Ready to Create screen contains options for installing the fax driver, updating the Microsoft Outlook/Novell GroupWise default mail profile, and making the CallPilot Desktop Messaging Setup Initialization program changes read-only.

The screen also contains Lotus Notes options for installing the fax batch driver, toggling the Auto-refresh feature, updating the mail database and updating the Personal Address Book.



Setup Initialization Complete

The Setup Initialization Complete screen informs the system administrator that the setup.ini file has been created.



Customizing Lotus Notes Templates

The directory containing the CallPilot Desktop Messaging Setup Initialization program and Setup.exe contain a templates folder. This folder is used to store Lotus Notes templates that have been customized by the system administrator. This folder is initially empty.

If a customer site requires changes to the Lotus Notes templates installed by CallPilot Desktop Messaging, the system administrator can make any necessary changes and save the results in the templates folder. When Setup.exe installs the Lotus Notes client, it will automatically copy and install templates from this folder, overriding the default templates included with the desktop client.

Setup.exe only copies and installs the following Lotus Notes templates from the templates folder:

- cpperab5.ntf
- cpperab60.ntf
- clpmail.box
- cpmail50.ntf
- cpmail60.ntf

Section E: Controlling access to features

In this section

Overview of feature access options	70
Controlling access to Desktop Messaging features	71
Controlling access to My CallPilot features	72
CallPilot server configuration for My CallPilot services	79

Overview of feature access options

Introduction

To provide users with access to Desktop Messaging (DM), 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, users 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 (RPL)

At least one RPL is associated with a mailbox class that has been assigned DM capability. CallPilot applies the DM RPL to all messages sent from the DM client's mailbox. If a message requires a feature that has an additional 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

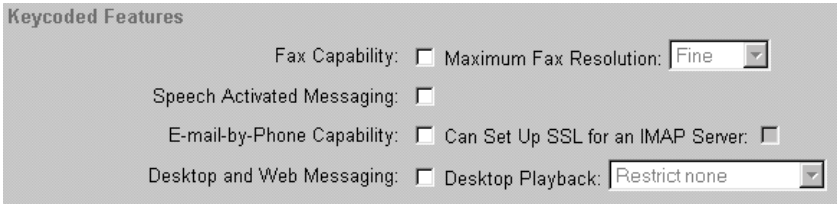
Introduction

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 screen appears.
3. In the Keycoded Features section, select the appropriate options.



   - To grant access to Desktop Messaging features, enable Desktop and Web Messaging capability.
   - To restrict audio playback and recording to either the computer or telephone, select the appropriate option in the Desktop Playback list.
   - To allow users to send and receive CallPilot fax and text messages, enable Fax Capability. Without fax capability, users can only send and receive voice messages.
4. Click **Save**.

Controlling access to My CallPilot features

Introduction

The following options are available to all mailbox owners:

- **Useful Information**—The Useful Information section of My CallPilot provides mailbox status information, dialing numbers for your CallPilot system, and CallPilot user documentation.
- **Downloads**—The Downloads page provides access to media players for recording and playing voice messages.
- **My CallPilot Home Page**—This option enables mailbox owners to select the default My CallPilot section to display after logon.

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

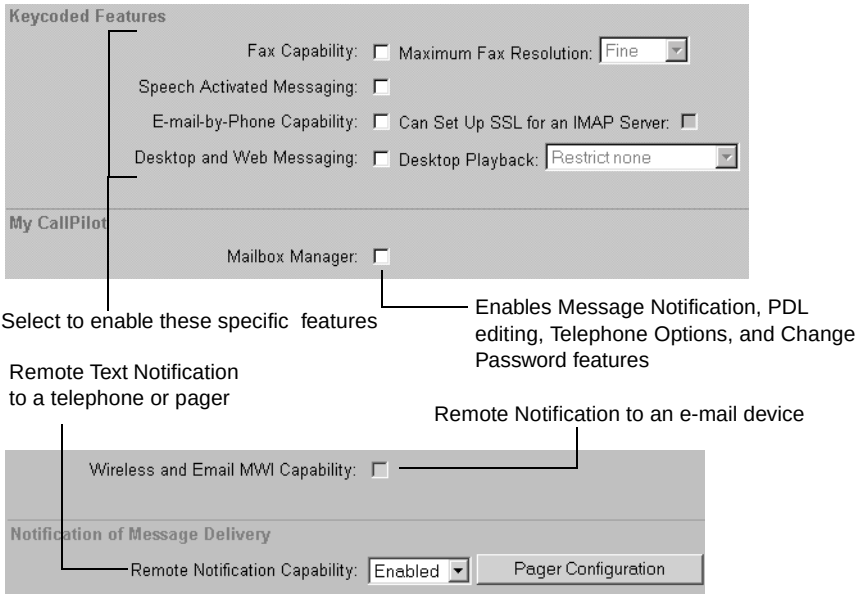
Controlling access to features

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

- **access to keycoded feature preferences**—When you grant access to fax messaging, desktop and web messaging, or E-mail-by-Phone, configuration options for these features appear in My CallPilot.
- **access to mailbox management options**—When you grant access to Mailbox Manager, the following options are available in My CallPilot:
  - message notification preferences
  - personal distribution list management
  - password change
  - options for the telephone interface

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

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



The following table 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
message notification, PDL editing, telephone options, and change Password	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 E-mail MWI Capability

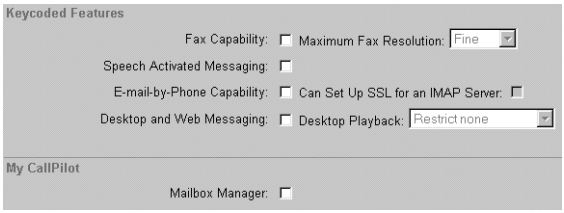
Access levels for My CallPilot

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

Reference information and documentation only

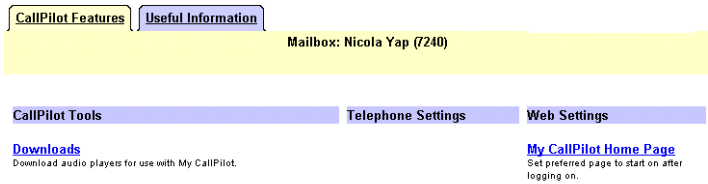
If you disable keycoded features and Mailbox Manager, My CallPilot only provides access to the Useful Information area, the Downloads page, and selection of the default My CallPilot tab.

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.



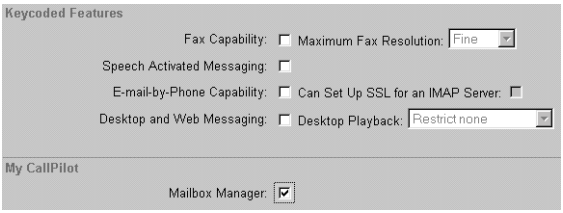
My CallPilot

My CallPilot options available for the mailbox class.

Mailbox management only

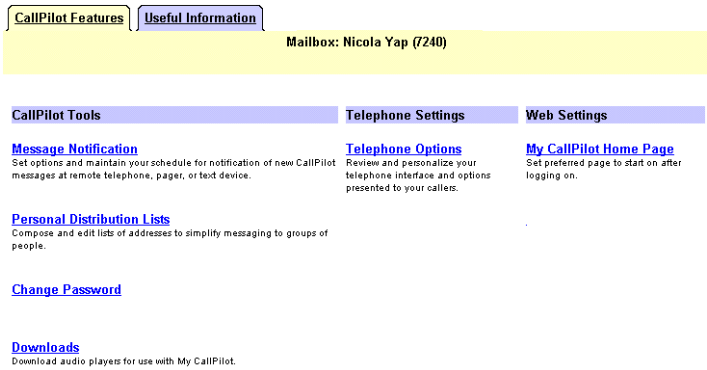
Since My CallPilot provides a graphical interface for configuring mailbox options, mailbox owners who do not require keycoded features can still benefit from web-based access to mailbox management.

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.

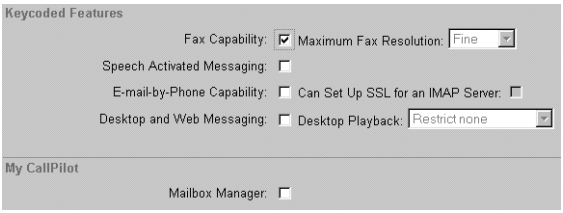
Keycoded features enabled without additional mailbox management

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

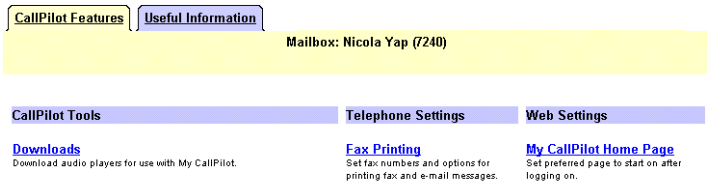
If some mailbox owners require keycoded features, and will only access My CallPilot occasionally to change their preferences, you can enable the required keycoded features and disable Mailbox Manager.

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.



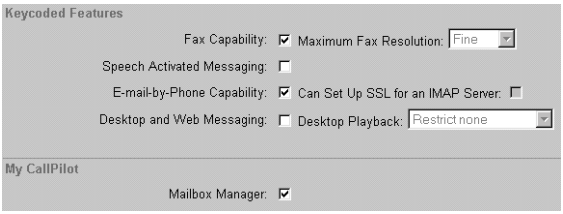
My CallPilot

My CallPilot options available for the mailbox class.

Keycoded features enabled with mailbox management

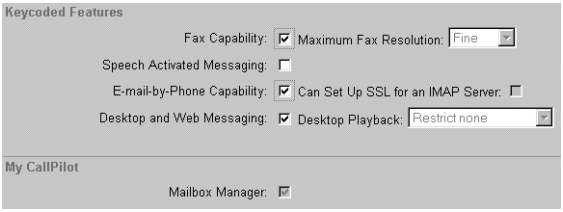
When you enable keycoded features for a mailbox class, you can also enable Mailbox Manager to provide access to mailbox management features.

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.



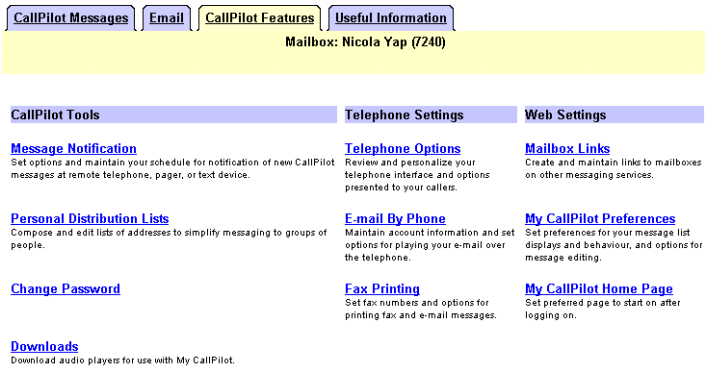
CallPilot Manager

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 whenever 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 screen 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 E-mail Servers.
2. In the External E-mail Server list, define the servers users can access with E-mail-by-Phone and from My CallPilot. For such servers, the TLS Port field should be set to 0 unless that server supports SSL IMAP connections.

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

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CallPilot

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