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CallPilot

What's New Guide

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NORTEL NETWORKS™

CallPilot

What's New Guide

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Section A: Documentation

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General

Conventions

This section provides an overview of the documentation for CallPilot 2.02. The table given in section "Summary of available documents" on page 15 lists the user guides and reference cards that are applicable to CallPilot 2.02. This information in this table is organized in the following columns:

- Document title
- Document number—the Nortel Networks technical publication (NTP) ten-digit number identifying the document (when applicable)
- Format
  - PM = printed manual
  - Help = PDF format in the online Help
  - CD = PDF format on the Documentation CD
  - Web = PDF format on the Nortel Networks Partner Information Center (PIC) web site
- Status
  - New in CallPilot 2.02
  - Revised for CallPilot 2.02
  - Unchanged from previous CallPilot versions
- Description

Document availability

The Standard 1.0 versions of all CallPilot 2.02 documents are available in PDF format on the CallPilot documentation CD. You can access some of the online guides, in PDF format, through the Help menu. The online Help utility is also available through the Help menu.

Refer to "Printed documentation at a glance" on page 13 for a list of the documents that are available on paper.

All the documentation is also available on the Nortel Networks web site at http://www.nortelnetworks.com/documentation in PDF format. You can access the PDF documents from the web-based application Helmsman Express for free, but you need to register for a password.

It is possible that some guides need to be updated with new information after the product release. This information is compiled in the *General Release Bulletin* (GRB), which is available in PDF format on the Nortel Networks PIC web site at http://my.nortelnetworks.com.

New documents at a glance

The following documents are new in CallPilot 2.02:

Title	P0 number
Part 2: 703t Server Hardware Installation	P0603578
Part 5: 703t Server Maintenance and Diagnostics	P0603582
Upgrade Guide	P0606149
Troubleshooting Reference Guide	P0603792

Printed documentation at a glance

The table below lists the documents that are available on paper. The entry in the Included column specifies whether these documents are included in the package that accompanies your server or not.

Title	P0 number	Included
Installation and Configuration Planner	P0605129	Yes
Part 1: Installation and Maintenance Overview	P0603577	Yes
Part 2: 703t Server Hardware Installation	P0603578	Yes

Title	P0 number	Included
Part 3: Meridian 1 and CallPilot Server Configuration	P0603579	Yes
Part 3: Succession 1000 and CallPilot Server Configuration	P0603580	No
Part 4: Software Installation and Maintenance	P0603581	Yes
Part 5: 703t Server Maintenance and Diagnostics	P0603582	Yes
Unified Messaging Quick Reference Card	P0949465	Yes
Unified Messaging Wallet Card	P0949466	Yes
Upgrade Guide	P0606149	No
Troubleshooting Reference Guide	P0603792	No

Summary of available documents

Document title	Document number	Format	Status	Description
What's New Guide	555-7101-901	CD, Web	Revised	Overview of all the new features of CallPilot 2.02
Planning and Engineering Guide	555-7101-101	CD, Web	Revised	Information and instructions for selecting and planning your CallPilot system
Desktop Messaging and My CallPilot Administration Guide	555-7101-503	CD, Web, Help	Revised	Instructions for configuring desktop messaging e-mail clients, configuring servers for desktop messaging and My CallPilot after installation, and troubleshooting information
Desktop Messaging and My CallPilot Installation Guide	555-7101-505	CD, Web, Help	Revised	Instructions for installing My CallPilot, and troubleshooting information

Document title	Document number	Format	Status	Description
Installation and Configuration Guides for your server model *This is a binder that contains the following five documents:* *Part 1: Installation and Maintenance Overview* *Part 2: <Server model> Server Hardware Installation* *Part 3: <Switch name> and CallPilot Server Configuration* *Part 4: Software Installation and Maintenance* *Part 5: <Server model> Server Maintenance and Diagnostics*	Refer to your binder for the NTP numbers.	PM, CD, Web, Help	New for the 703t documents and Revised for the other documents	Installation and configuration information for the 200i, 201i, 702t, 703t, 1001rp, and 1002rp CallPilot servers, as well as for the Meridian 1 and Succession 1000 switches
Networking Enhancements Guide	555-7101-507	CD, Web, Help	Revised	Description of the features and capabilities of the networking solutions
Networking Planning Guide	555-7101-100	CD, Web, Help	Unchanged from release 1.07	Information on all the variations of networking used by CallPilot, switches and servers
NMS Implementation and Administration Guide	555-7101-302	CD, Web, Help	Unchanged from release 1.07	Information on all the variations of networking used by CallPilot, switches and servers

Document title	Document number	Format	Status	Description
AMIS Networking Implementation and Administration Guide	555-7101-303	CD, Web, Help	Unchanged from release 1.07	Information on all the variations of networking used by CallPilot, switches and servers
Enterprise Networking Implementation and Administration Guide	555-7101-304	CD, Web, Help	Unchanged from release 1.07	Information on all the variations of networking used by CallPilot, switches and servers
Integrated AMIS Networking Implementation and Administration Guide	555-7101-305	CD, Web, Help	Unchanged from release 1.07	Information on all the variations of networking used by CallPilot, switches and servers
VPIM Implementation and Administration Guide	555-7101-306	CD, Web, Help	Unchanged from release 1.07	Information on all the variations of networking used by CallPilot, switches and servers
Meridian Mail to CallPilot Migration Utility Guide	555-7101-801	CD, PM	Revised	Instructions on migrating a Meridian Mail system to CallPilot
Administrator's Guide	555-7101-301	CD, Web	Revised	Information on the administration of the CallPilot system
Application Builder Guide	555-7101-325	CD, Web	Revised	Information on designing, managing, implementing, and troubleshooting CallPilot applications
Reporter Guide	555-7101-310	CD, Web	Revised	Information on generating and interpreting reports.
Upgrade Guide	Not applicable	PM	New	Information on upgrading CallPilot 1.07 and 2.0 to CallPilot 2.02

Document title	Document number	Format	Status	Description
Troubleshooting Reference Guide	Not applicable	PM, Web	New	Information on troubleshooting CallPilot
Unified Messaging What's New Card	Not applicable	CD	Revised	Reference card for new features in unified messaging
Unified Messaging Quick Reference Card	Not applicable	PM, CD	Revised	Quick reference card for unified messaging
Unified Messaging Wallet Card	Not applicable	PM, CD	Revised	Smaller quick reference card for unified messaging
Menu Interface Quick Reference Card	Not applicable	CD	Revised	Reference for the menu interface
Alternate Command Interface Quick Reference Card	Not applicable	CD	Revised	Reference for the alternate commands for the interface
Command Comparison Cards	Not applicable	CD	Revised	Reference for command comparison
Multimedia Messaging User Guide	Not applicable	CD	Revised	Information on using the telephone and PC for multimedia messaging
Speech Activated Messaging User Guide	Not applicable	CD	Revised	Information on using speech activated messaging
Desktop Messaging User Guides	Not applicable	PM, CD	Revised	Information about using Microsoft Outlook, Lotus Notes, Novell Groupwise, and Internet Clients on your PC
My CallPilot User Guide	Not applicable	PM, CD	Revised	Information about using My CallPilot

New features at a glance

New feature or feature type	Related documents
CallPilot administration over the Web	*Administrator's Guide* *Planning and Engineering Guide*
Encryption	*Network Enhancements Guide*
SMTP security	*Network Enhancements Guide*
E-mails and mobile phones	*Administrator's Guide*
E-mail By Phone	*Administrator's Guide*
My CallPilot (installation)	*CallPilot Desktop Messaging and My CallPilot Installation Guide*
My CallPilot (administration)	*CallPilot Desktop Messaging and My CallPilot Administration Guide*
Remote text notification	*CallPilot Desktop Messaging and My CallPilot Administration Guide* *CallPilot Unified Messaging What's New Card*
703t server	*Part 2: 703t Server Hardware Installation (Installation and Configuration binder)* *Part 5: 703t Server Maintenance and Diagnostics (Installation and Configuration binder)* *Planning and Engineering Guide*
1002rp server	*Part 2: 1002rp Server Hardware Installation (Installation and Configuration binder)* *Part 5: 1002rp Server Maintenance and Diagnostics (Installation and Configuration binder)* *Planning and Engineering Guide*
Succession 1000 switch	*Part 3: Succession 1000 and CallPilot Server Configuration (Installation and Configuration binder)* *Planning and Engineering Guide*

New feature or feature type	Related documents
Symposium Call Center Server prompts migration	*Meridian Mail to CallPilot Migration Utility Guide*
Selective migration	*Meridian Mail to CallPilot Migration Utility Guide*
Enhanced backup and restore	*Administrator's Guide*
Defining administrators	*Administrator's Guide*
CallPilot Manager	*Administrator's Guide*
NMS in multiple time zones	*Network Enhancements Guide*
Names Across the Network (NAN)	*Network Enhancements Guide*
Profiles (in Reporter)	*Reporter Guide*
Call Sender	*Desktop Messaging*
Restriction of audio device	*Desktop Messaging*
View distribution lists in the CallPilot Address Book	*Desktop Messaging*
Addressing messages to distribution lists	*Desktop Messaging*
Accessing address books	*Desktop Messaging*
Send CallPilot messages to external e-mail addresses	*Desktop Messaging for Lotus Notes*
Convert CallPilot voice messages automatically to WAV format	*Desktop Messaging for Lotus Notes*
Change your CallPilot password	*Desktop Messaging for GroupWise*
Windows 2000 server	*Planning and Engineering Guide*
Windows XP	*Planning and Engineering Guide*
PEP service update utility	*Part 4: Software Installation and Maintenance (Installation and Configuration binder)*

Section B: New features

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Overview of the new features

Introduction

CallPilot 2.0 was a major release with 41 new features and enhancements. CallPilot 2.02 expands on the already substantial current feature set and improves the overall usability and functionality.

This section provides an overview of the new CallPilot features and enhancements.

Major changes in CallPilot

- CallPilot administration over the Web
- Enhanced management of the messaging network
- Enhanced mailbox use from a mobile phoneset
- Enhanced mailbox use from a personal computer
- Enhanced backup and restore capabilities
- Easier delegation of administrative tasks
- Expanded search functionality
- Ease of use with other messaging solutions
- Enhanced addressing capability
- Succession 1000 switch connectivity
- Symposium Voice Services Support
- Support for Lotus Notes 6.x
- Limited support for My CallPilot web-messaging on Macintosh systems
- Network Diagnostics screen

Web-based features

With CallPilot 2.02, you no longer need to install CallPilot Administration Client software. You can administer the CallPilot Server from any PC equipped with a web browser, such as Internet Explorer or Netscape, using CallPilot Manager.

CallPilot Reporter is also web-based in CallPilot 2.02

Supported switches

CallPilot supports the Meridian 1 switch and the Succession 1000 system.

New hardware platforms

CallPilot 2.02 supports two new servers:

- 703t tower platform
- 1002rp rackmount platform

For more information on the new servers, refer to the *Planning and Engineering Guide* (555-7101-101).

Unified Messaging features and enhancements

The Unified Messaging new features and enhancements provide the following advantages:

- improved integration with Lotus Notes
- support for My CallPilot users on Macintosh workstations
- support for Citrix client software (thin clients)
- address book improvement
- increased fax functionality
- ability of a Microsoft Outlook user to call the sender of a Microsoft Outlook e-mail message with a single mouse click

New in migration

What's new in migration

This section presents new information that concerns the migration utility. The following topics are covered:

- Symposium Call Center Server prompts from Meridian Mail to a CallPilot system
- migration to CallPilot systems

If you want to migrate your Meridian Mail system to CallPilot, ensure that you have the Meridian Mail to CallPilot Migration Tape (NTUB25AA).

Symposium Call Center Server prompts migration

You can migrate Symposium Call Center Server prompts from Meridian Mail only to CallPilot 2.02. Symposium Call Center Server prompts are not supported on CallPilot 1.07.

On Meridian Mail, the Symposium Call Center Server prompts are stored in a file (which looks like a message) in a mailbox. During the migration, the CallPilot 2.02 migration utility automatically creates the Application Builder applications. You can then use Application Builder to maintain the prompts.

Migration to CallPilot systems

You can perform a migration from Meridian Mail to either CallPilot 1.07 or CallPilot 2.02. There are no changes to the CallPilot 1.07 migration utility.

The CallPilot 2.02 migration utility allows you to migrate all information from Meridian Mail to CallPilot, or to perform a selective migration. In a selective migration, you can choose to migrate each of the following data sets individually:

- messages
- Symposium Call Center Server prompts
- messages and Symposium Call Center Server prompts
- system data, which includes
  - system and customer profiles
  - networking data
  - restriction/permission lists (RPL)
  - Classes of Service (COS)
- users
- Application Builder services (voice menus, voice services, and announcements)
- system distribution lists (SDL)
- personal distribution lists (PDL)

New in administration

What's new in administration

This section provides information on the new administration features of CallPilot 2.02

CallPilot administration over the Web

In CallPilot 2.02, the administrative PC required to administer a CallPilot server and to generate reports about the CallPilot server is replaced with a web-based administrative interface.

The implementation of the web application CallPilot Manager on the PCs replaces the Windows-based CallPilot Administration client used in prior versions of CallPilot.

CallPilot Reporter has been also converted to a web application.

You can use any Windows personal computer running the following web browsers:

- Internet Explorer 5.x (with service pack 2) and 6.x
- Netscape 6.2 and 7.0

Application Builder remains a Windows-based application. Administrators can use CallPilot Manager to download Application Builder and CallPilot Player to a personal computer.

The following table summarizes the use of web browsers:

Web browser use	Reference
Monitoring the CallPilot server	*Administrator's Guide,* Part 6, "Monitoring the CallPilot system"
Generating Operational Measurement (OM) reports	*Administrator's Guide,* "Running system reports"
Configuring a CallPilot server	Part 1 of the *CallPilot Installation and Configuration* binder, Chapter 2 "Installing, configuring, and maintaining CallPilot"
Granting full or specific administrative privileges to others without defining access classes	*Administrator's Guide,* "About CallPilot Administration" and Chapter 4, "Delegating administrative tasks"
Creating and maintaining a messaging network	CallPilot Manager online Help book Creating a messaging network
Setting security options for CallPilot Manager sessions	CallPilot Manager online Help topic Getting started → "Setting security options for CallPilot Manager sessions"

Enhanced management of the messaging network

CallPilot allows the administrator to perform the following tasks:

- configure extensive network security enhancements
- configure network broadcast capability for mailbox class members
- add automatically a permanent remote user and record a spoken name on the user's behalf

- configure time and date stamps on messages and voice prompts to be indicated in the user's time zone, instead of in the time zone of the CallPilot server

Network security enhancements

Network security enhancements include the following aspects:

- encryption of message traffic using transport layer security (TLS)
- authentication of desktop messaging users and remote voice mail servers submitting messages to CallPilot
- monitoring of suspect SMTP network activity

For more information on this issue, see "Network security" on page 39.

Network broadcast capability

If networking or Network Message Service (NMS) is installed, you can permit selected mailbox owners to send location broadcasts or network broadcasts. For more information, see "Network and location-specific broadcasting" on page 41.

Network Message Service in multiple time zones

All switch locations can be located in the same time zone, or in different time zones than the CallPilot server (local site). For more information, see "Network Message Service in multiple time zones" on page 42.

Names Across the Network

Names Across the Network (NAN) is a feature that allows the spoken names of message senders to be reproduced at recipient sites. For more information, see "Names Across the Network" on page 41.

Enhanced backup and restore capabilities

The enhanced backup and restore capabilities, and the simplified processes provided by CallPilot Manager significantly reduce the workload for CallPilot administrators.

Dynamic user archives

When you add or delete mailboxes, administrators, or directory entries, you do not have to redefine the archive manually to reflect the changes before you back up the mailbox information to the archive. The user archive backup process uses CallPilot Manager search functions to automatically update the archive as you back up information.

Simplified processes

The following table summarizes the streamlined backup and restore processes provided by CallPilot 2.02:

Task	Reference
backing up the entire CallPilot system to a tape drive or to a remote disk drive on your LAN.	*Administrator's Guide*, "Scheduling backups to tape or disk" and "Performing an immediate backup to tape or disk"
using the same process to back up ■ system configuration information ■ mailbox information ■ custom system prompts ■ custom applications and services	*Administrator's Guide*, "Scheduling backups to tape or disk" and "Performing an immediate backup to tape or disk"
using CallPilot Manager to ■ monitor the status of a backup or restore operation ■ review the details of a prior backup or restore operation	*Administrator's Guide*, "Monitoring the status of a backup or restore operation"
defining a user archive around any user search criterion	*Administrator's Guide*, "Using mailbox (user) archives"
restoring information archived for all deleted mailboxes only	*Administrator's Guide*, "Using mailbox (user) archives"

Easier delegation of administrative tasks

CallPilot 2.02 administrators can immediately define any or all of the following types of administrator:

- full administrator without mailbox: a CallPilot Manager user who has no mailbox privileges (typically, an off-site support technician).
- global administrator: a mailbox owner who has been granted access to all CallPilot Manager functionality.
- specialized administrator: a mailbox owner who has been granted access to specified CallPilot Manager functions.

New in Reporter

What's new in Reporter

CallPilot Reporter has the following new features:

- New web-based interface—a customer-supplied Microsoft Internet Information Server (IIS) web server is required for CallPilot Reporter. The interface makes Reporter easier to use, and report generation is faster.
- Increased accessibility—you no longer need to schedule and download data to your computer to generate reports. Data remains on your web server and is available at all times.
- Personalized settings—Reporter can save your custom reports, settings, and logs for future sessions. The saved information is called a profile. For more information about profiles, see the *Reporter Guide*, "Reporter profiles" section.
- Event logging—the Reporter Log tracks changes that you perform. The log is a part of your Reporter profile.
- New reports—Reporter includes an Administration Action report to track changes made by administrators.
- More CallPilot systems supported by CallPilot Reporter—after the installation of the performance enhancement package (PEP) 47C, a single instance of CallPilot Reporter running on the customer-provided Web server can support a maximum of 20 CallPilot systems. Before the installation of PEP 47C, an instance of CallPilot Reporter supported a maximum of two CallPilot systems.

New in Application Builder

What's new in Application Builder

Application Builder has the following new features in CallPilot 2.02:

- CallPilot Manager—a new web-based interface for administration; you can launch Application Builder from CallPilot Manager, or from Windows using the Start menu.
- Mode option—you have the option to run Application Builder in standalone mode or from CallPilot Manager.
- Diagnostics and logs—you can enable program diagnostics and specify how much detail to include in Application Builder log files. This helps you identify the source of problems and troubleshoot them.

New in Desktop Messaging

For detailed information on CallPilot Desktop Messaging, refer to:

- *Desktop Messaging and My CallPilot Installation Guide* (555-7101-505)
- *Desktop Messaging and My CallPilot Administration Guide* (555-7101-503)

Feature enhancements

In CallPilot 2.02 Desktop Messaging, feature enhancements enable desktop messaging users to:

- respond to voice messages with a telephone call
- disconnect a call from the computer (CallPilot Player)
- annotate faxes sent with Nortel Fax in the CallPilot message form
- access My CallPilot directly from desktop messaging
- insert pauses and pound key symbols in telephone and fax numbers
- access a dynamic CallPilot address book from the CallPilot server
- access shared, broadcast, and personal distribution list addresses in the CallPilot address book
- send broadcast messages to all CallPilot users in specific locations or in all locations
- access the CallPilot address book from a third-party server
- use desktop messaging for Lotus Notes
  - send CallPilot messages to external e-mail addresses
  - automatically convert CallPilot voice messages to WAV format
- use desktop messaging for Novell GroupWise (change your CallPilot password)

CallPilot administrators can restrict recording and playback of voice messages to a single device (computer or telephone). This feature is used to save network bandwidth.

CallPilot 2.02 provides support for Business Communications Manager (BCM) and CallPilot 150 servers.

Enhanced mailbox use from a personal computer

Desktop messaging enhancements include

- mailbox use and management by way of My CallPilot from any personal computer running either Internet Explorer 5.0 or later, or Netscape 6.2 or later
- remote text notification of new or urgent messages

My CallPilot

The CallPilot desktop messaging license also permits each desktop messaging user to access My CallPilot.

My CallPilot is a suite of web-based applications for CallPilot mailbox owners, and provides a central graphical interface for managing messages, as well as mailbox and messaging options.

My CallPilot includes the following features:

- CallPilot Messages (also known as web messaging)—a section in the My CallPilot application for managing CallPilot and e-mail messages. This feature allows mailbox owners to access their messages from any place where Internet access is available.
- CallPilot Features—a section in the My CallPilot application that enables mailbox owners to select and modify mailbox and messaging options.
- Useful Information—a section in the My CallPilot application that includes reference information and online guides for CallPilot mailbox owners.

The My CallPilot applications and features available to mailbox owners are determined by the software installed on the system and by the privileges that the CallPilot administrator assigned.

Remote text notification

The remote text notification of new or urgent messages is a basic CallPilot feature that allows message notification to either SMS-enabled mobile phones or e-mail devices such as the RIM Blackberry. You can set up and schedule these devices in the Message Notification option in My CallPilot Features.

When a CallPilot 1.07 system is upgraded to CallPilot 2.02, mailbox owners with remote notification capability are automatically given remote text notification capability.

Messaging server compatibility

Overview

CallPilot 2.02 desktop messaging clients work with the following messaging servers:

- CallPilot 2.02
- CallPilot 1.07
- BCM
- CallPilot 150

The availability of some features depends on the messaging server that you use. If you have a BCM or CallPilot 150 server, refer to your messaging server documentation to find out if desktop messaging supports your specific server release.

Feature availability

The following feature limitations apply when using desktop messaging with CallPilot 1.07, CallPilot 2.02, CallPilot 150, and BCM servers:

Feature	Availability
Fax and text messaging	CallPilot 1.07, CallPilot 2.02, and BCM
Read receipts	CallPilot 1.07 and CallPilot 2.02
Trivial password rejection	CallPilot 1.07 and CallPilot 2.02 **Note:** Trivial passwords are composed of simple character strings, such as 1111 or 88888. Since the trivial passwords can be easy to guess, CallPilot 1.07 and 2.02 servers reject them. CallPilot 150 and BCM servers accept trivial passwords. Nortel Networks recommends that users avoid defining trivial passwords.
Password length	CallPilot 1.07 and CallPilot 2.02 (passwords of up to 16 characters) CallPilot 150 and BCM (passwords of up to 8 characters)
New message notification	CallPilot 1.07 and CallPilot 2.02 (default, automatic notification of new messages as soon as they arrive) CallPilot 150 and BCM (immediate message notification is not supported; minimum one-minute checking interval for new messages)
My CallPilot	CallPilot 2.02
Call Sender	CallPilot 2.02

Feature	Availability
Restriction of audio device	CallPilot 2.02 **Note:** The CallPilot 2.02 server enables administrators to restrict playback and recording to a single audio device (computer-only or telephone-only). This restriction is not available for the other messaging servers.
View distribution lists in the CallPilot Address Book	CallPilot 2.02
Addressing messages to distribution lists	CallPilot 2.02
Time zone information	CallPilot 2.02 **Note:** Time zone information is included in messages if NMS is installed. The other messaging servers do not include time zone information. For these servers, the sent time and received time are both set to the time that you received the message.

Voice format

Different voice formats are used for each messaging server:

Voice format	Messaging server
VBK	CallPilot 2.02 and CallPilot 1.07
G723.1	CallPilot 150
G711	Business Communications Manager

All formats include the CallPilot VBK header. This header provides message information such as Subject, From, Date, and Length.

Windows users can save voice messages in either VBK or WAV format, regardless of the server from which the file originated.

New in networking

Network security

CallPilot 2.02 provides the following new network security features:

- Simple Mail Transfer Protocol (SMTP) authentication
- monitoring suspicious SMTP activity
- encryption

SMTP authentication

You can secure your messaging network by authenticating SMTP connections between the following:

- desktop or web messaging users, and the CallPilot server
- CallPilot server and voice messaging systems at remote sites—applicable to Voice Profile for Internet Mail (VPIM) networking only

The SMTP authentication prevents hackers from connecting to your CallPilot server, thereby reducing the risk of junk e-mail proliferation or denial of service.

For detailed information, refer to the following CallPilot Manager online Help section: Creating a messaging network → SMTP security. Also refer to the following documents:

- *Desktop Messaging and My CallPilot Installation Guide* (555-7101-505)
- *Desktop Messaging and My CallPilot Administration Guide* (555-7101-503)

Monitoring suspicious SMTP activity

You can use one of the following tools to monitor suspicious SMTP and VPIM networking activity:

- the event log (automatic monitoring)

  If you choose to use the event log as your monitoring method, no action is required from you to initiate the SMTP/VPIM monitoring.
- the Security Administration page in CallPilot Manager (manual monitoring); you can monitor suspicious networking activity manually using the following information:
  - host name of the remote messaging server or desktop or web messaging client attempting to connect
  - IP address of the remote messaging server or desktop or web messaging client attempting to connect
  - authenticating user ID

Encryption

You can guarantee the privacy of messages transmitted over the network by encrypting connections between the following:

- the desktop or web messaging users and the CallPilot server
- the CallPilot server and voice messaging systems at remote sites—applicable to VPIM networking only

Encryption prevents others from listening to or viewing the contents of messages while the messages are in transit.

For information about encryption and desktop or web messaging users, refer to the CallPilot Manager online Help (section Creating a messaging network → Encryption) and to the following documents:

- *Desktop Messaging and My CallPilot Installation Guide* (555-7101-505)
- *Desktop Messaging and My CallPilot Administration Guide* (555-7101-503)

Network and location-specific broadcasting

Mailbox owners can broadcast messages to other users at various locations:

- specific remote site (location broadcast)
- specific NMS location at the local or remote site (location broadcast)
- all sites and locations (network broadcast)

Prior to CallPilot 2.0, mailbox owners could send broadcast messages only to mailbox owners at the local site (local broadcast).

Note: All NMS locations associated with the local site also receive the local broadcast.

For detailed information, refer to the following CallPilot Manager online Help sections:

- Creating a messaging network → Network and location broadcasts
- Creating a messaging network → Message delivery options

Names Across the Network

The Names Across the Network (NAN) feature allows the spoken names of message senders to be reproduced at recipient sites. If a sender does not exist at the recipient site as a remote user, a temporary remote user is added to the site with the sender's text name and spoken name.

With the NAN feature, the system administrator does not have to add a permanent remote user manually and to record a name on the user's behalf anymore.

The VPIM networking supports the NAN feature. Previously, only the Enterprise networking supported this feature

Notes:

- You must coordinate with the network administrator of each remote site with which you want to enable NAN. The NAN feature works only with remote sites that use Enterprise or VPIM networking, and must be enabled on both the local messaging server and the remote servers.
- If you are using VPIM networking, the NAN feature works even when the option is disabled.

For instructions on enabling the NAN feature, refer to the CallPilot Manager online Help.

Network Message Service in multiple time zones

You can specify the time zone setting for each NMS satellite switch location that is associated with the local server. When the time zone for a satellite switch location is different from the time zone on the local server, time information is presented to the location's mailbox owners in the location's time zone.

Prior to CallPilot 2.0, time information for mailbox owners who were located in a different time zone from the CallPilot server were indicated in the CallPilot server's time zone.

Notes:

- Time information is presented in the form of message envelope information and CallPilot voice prompts.
- The prime switch location inherits the time zone setting from the local server. You cannot change the time zone setting.

Network administration

The administration interface for CallPilot 2.02 and the online Help for messaging network administration have been enhanced. The administration is now web based, and requires the CallPilot Manager web server software.

New in Unified Messaging

New for messaging users

Fax batch

Users can send a single fax to multiple recipients, customizing each fax for a specific recipient by using the Microsoft Word mail merge feature.

To use the mail merge features, the users need two documents:

- a main document—the file that is to be sent to recipients
- a data source document—the file containing recipient information such as names and fax numbers

The feature is available only to CallPilot desktop and Web users who install the Fax Batch driver for mail merge. Macintosh systems do not support this feature.

Custom fax cover sheets

Users can choose customized cover sheets from a list of templates when composing fax messages in CallPilot. Users can also enable or disable the feature from a desktop configuration dialog box. The cover sheet fields are populated automatically and can be previewed before they are sent.

Administrators can use any digital image to create and then distribute additional cover sheet templates. One basic cover page is installed with the Desktop Messaging client. The Inisetup.exe utility can be modified to distribute cover sheets to all users.

Macintosh systems do not support this feature.

New for Microsoft Outlook users

Microsoft Outlook call e-mail sender

Users of Microsoft Outlook can now call with a click of a mouse button the sender of an e-mail message created in Microsoft Outlook.

When multiple numbers are located, the user is prompted to verify the number before CallPilot dials it. The CallPilot desktop client attempts to remember any numbers that have been selected from a list.

The system administrator of the global address book is responsible for ensuring that valid telephone information is available to the users.

Microsoft Outlook Address Book enhancements

Microsoft Outlook users can send CallPilot messages to any voice or fax numbers in their existing Microsoft Outlook Contacts address book. Prior to this release, users had to create a separate Contacts list in a special format.

When CallPilot detects multiple addresses for the same contact, the user is asked to choose the correct address.

CallPilot still checks the restriction/permission list (RPL) to determine whether the sender has the necessary permissions to send the message to a specific telephone or fax number.

New for Lotus Notes users

Lotus Notes dynamic Address Book

The users of Lotus Notes can query and retrieve addresses dynamically from the CallPilot address book at any time. As a result, the Lotus Notes users do not have to download the CallPilot address book into a Personal or Public Lotus Notes Address Book.

When a Lotus Notes user logs on to a CallPilot server, the CallPilot server address book appears automatically in the list of available address books. No user or administrator configuration is required.

Users are still able to download CallPilot address information to their Personal Address Book to address messages in the online and offline modes.

Lotus Notes automatic refresh

Lotus Notes users have the ability to enable or disable Lotus Notes Auto Refresh, which automatically adds CallPilot messages to their Lotus Notes CallPilot view.

Lotus Notes multiple database support

Lotus Notes users can now change their mail database views on the fly (either at startup or during an active session), without any interruption in CallPilot services. The CallPilot desktop client for Lotus Notes detects if a user's mail database changed, and synchronizes with the new mail database.

Lotus Notes Address Book enhancements

Lotus Notes users can send CallPilot messages to any voice or fax recipients in their existing Personal Address Book. Prior to this release, users had to create a separate Contacts list in a special format.

When CallPilot detects multiple addresses for the same contact, the user is asked to choose the correct address.

CallPilot still checks the RPL to determine whether the sender has the necessary permissions to send the message to a specific telephone or fax number.

New for Macintosh users: My CallPilot for Mac OS

My CallPilot supports Mac OS 9.0 and 9.1 web clients and offers the same browser support as Windows. The Mac client must be equipped with

- AppleScript version 1.3
- PowerPC G3 (or newer) processor
- any speakers supported by the Mac OS
- any microphone supported by the Mac OS

The Mac OS supports all the My CallPilot functionality as the Windows OS, with the following exceptions:

- embedded audio player
- auto download of the audio player
- audio streaming

My CallPilot for the Mac OS requires the same CallPilot server configuration as My CallPilot for the Windows OS.

Notes:

1. My CallPilot version 2.0 with service update 2 (SU 2) offers partial support for My CallPilot users on Mac OS and Mac OS X (.wav support only and no fax driver capability).
2. The BCM or CallPilot 150 servers do not support My CallPilot.

New for Administrators

My CallPilot voice block

This feature allows the system administrator to control the distribution of CallPilot voice messages outside the company. If this feature is enabled, the My CallPilot users are not able to save voice messages to the local PC or forward voice messages to non-CallPilot addresses. However, users are still able to forward voice messages to CallPilot addresses.

The administrator controls the voice block feature from a check box in the Security settings tab of the My CallPilot Administration Utility dialog box.

Microsoft Outlook, Lotus Notes and GroupWise clients already support the voice block feature.

This voice block feature has a limitation. The users of Internet Message Access Protocol (IMAP) clients (for example, Microsoft Outlook Express, Eudora, or Netscape Messenger) can forward messages to external e-mail accounts.

Citrix thin client

Administrators can support multiple users by installing one instance of the Unified Messaging client on a terminal server. This eliminates the need to install a client for every Microsoft Windows user but still provides access to all the features of the CallPilot Desktop Messaging Client and My CallPilot.

Services are provided to Citrix thin-client terminals by a Microsoft terminal server running the Citrix Metaframe 1.8 or Citrix Metaframe XP software.

The Windows terminal server must be one of the following:

- Windows 2000 Server
- Windows 2000 Advanced Server
- Windows 2000 Datacenter Server

The OS of the Citrix thin client must be one of the following:

- Windows 98
- Windows 98SE
- Windows 2000
- Windows XP

Macintosh systems do not support this feature.

IniSetup enhancements

The system administrators are responsible for running the IniSetup utility to create customized CallPilot Desktop Messaging installations. This process prefills many required fields in the installation dialog boxes and makes end-user installations easier.

By running the IniSetup utility, the system administrators can accomplish the following:

- force the installation of CallPilot Desktop clients, regardless of which e-mail client is actually present
- enable or disable cover pages for a client when a fax message is forwarded
- point all end-users to a shared network folder that contains cover pages
- control security features for desktop installations
- override the default ports for connecting to the CallPilot Server

This IniSetup utility also allows the system administrator to control

- the installation of the fax printer driver
- the installation of the fax batch driver for mail merge
- the update of default mail profile
- the update of Lotus Notes mail database
- the update of Lotus Notes Personal Address Book
- the Auto Refresh option
- the user ability to modify the settings established by the IniSetup wizard

Miscellaneous

Fax messaging controls

Integrated Fax Messaging Controls replace the Microsoft Imaging application for Windows, and provide improved support for Windows XP. You no longer need to install Windows Imaging.

The Fax Messaging Controls are used to display, rotate, zoom, and annotate fax images, as well as to merge fax documents from the fax driver. The user interface for the controls is unchanged.

This feature is supported only by the Microsoft Outlook, Lotus Notes, and GroupWise custom form and the fax driver.

The Macintosh, Web or IMAP clients do not support this feature. These clients must use the standalone applications associated with the TIF files.

Support tables

The following tables summarize the support of Unified Messaging associated with various CallPilot releases for various client, OSs and web server software packages.

GroupWare clients

Groupware e-mail clients	1.07x	2.0x	2.5
Microsoft Exchange 4.x	X		
Microsoft Exchange 5.x	X		
Microsoft Outlook 97	X		
Microsoft Outlook 98 (corporate mode)	X	X	X
Microsoft Outlook 2000	X	X	X
Microsoft Outlook 2002 (XP)	X[a]	X	X
Lotus Notes 4.5x	X		
Lotus Notes 4.6x	X	X	
Lotus Notes 5.0x	X	X	X
Lotus Notes 6.0		X[b]	X
GroupWise 5.5x	X	X	
GroupWise 6.0x	X	X	X
GroupWise 6.5			X

a. Only release 1.07.11.24 of the Desktop Messaging Client supports Microsoft XP Professional.

b. Only the CallPilot 2.02 Desktop Messaging Client supports Lotus Notes 6.0. Any prior releases of the 2.0 Desktop Messaging Client are not compatible with Lotus Notes 6.0.

Internet mail clients

Internet mail clients	1.07x	2.0x	2.5
Microsoft Outlook Express (Internet Explorer 4.0) 4.x	X		
Microsoft Outlook Express 5.x	X	X	X
Microsoft Outlook Express 6.x		X	X
Microsoft Outlook 98 (Internet Mail Mode)	X	X	X
Microsoft Outlook 2000 (Internet Mail Mode)	X	X	X
Microsoft Outlook 2002 (XP) (Internet Mail Mode)	X	X	X
Netscape Messenger (Netscape Communicator) 4.5	X		
Netscape Messenger (Netscape Communicator) 4.6	X		
Netscape Messenger (Netscape Communicator) 4.7x	X		
Netscape 6.2x		X	X
Netscape 7.x			X
Qualcomm Eudora Pro 4.02	X		
Qualcomm Eudora Pro 4.2	X		
Qualcomm Eudora Pro 5.x	X	X	X

Web clients

Web clients (My CallPilot)	1.07x	2.0x	2.5
Netscape Navigator 4.0x	X		
Netscape Communicator 4.5	X		
Netscape Communicator 4.6	X		
Netscape Communicator 4.7x	X		
Netscape 6.2x		X	X
Netscape 7.x			X
Microsoft Internet Explorer 4.x	X		
Microsoft Internet Explorer 5.x	X	X	X
Microsoft Internet Explorer 6.x	X	X	X

Operating systems

Operating systems	1.07x	2.0x	2.5
Windows 95A	X		
Windows 95B	X	X	
Windows 98	X		
Windows 98 SE	X	X	X
Windows ME	X		
Windows 2000 Professional	X	X	X
Windows XP Professional	X	X	X
Win NT 4.0 SP1	X		
Win NT 4.0 SP2	X		
Win NT 4.0 SP3	X		
Win NT 4.0 SP4	X		
Win NT 4.0 SP5	X		
Win NT 4.0 SP6a	X	X	X
Macintosh OS 9.0, 9.1		X[a]	X[b]

a. CallPilot 2.02 provided read/listen only functionality with no CallPilot player or fax driver.

b. Macintosh OS 9.0 and 9.1 support Web Messaging only when My CallPilot is accessed through Internet Explorer or Netscape. There is currently no support for Macintosh via the Desktop Messaging Client.

Web server

Web Server:	1.07x	2.0x	2.5
Microsoft Internet Information Server 4 on Windows NT Server 4.0 SP6a	X	X	X
Microsoft Internet Information Server 5 on Windows 2000 Server SP1 and above	X	X	X

Thin clients

Thin clients:	1.07x	2.0x	2.5
Citrix® Metaframe 1.8 on Windows 2000 Server, Windows 2000 Advanced Server or Windows 2000 Datacenter Server			X
Citrix® MetaFrame XP (Standard, Enterprise or Advanced Editions) on Windows 2000 Server, Windows 2000 Advanced Server or Windows 2000 Datacenter Server			X

Other new features

New for end users

E-Mail by Phone

The E-mail by Phone feature enables mailbox owners to listen to e-mail messages over a telephone in the same way they listen to voice messages.

If the new keycoded feature E-mail By Phone (text-to-speech) is installed, you can provide mailbox class members with the ability to use voice commands to listen to e-mail messages over a mobile phoneset in any of 10 languages. Refer to the *Administrator's Guide*, "Permitting mailbox class members to listen to e-mail messages over a phoneset".

Speech activated messaging

Speech activated messaging (SAM) is a voice messaging service that is enabled by speech recognition technology. The SAM service can be used as an alternative to dual-tone multifrequency (DTMF) commands.

The SAM service enables mailbox owners to speak commands for mailbox navigation, as well as for playing, recording, composing and sending messages.

If SAM is installed, selected mailbox owners can use voice commands instead of key commands to use their CallPilot mailboxes.

CallPilot SAM enhancements provide

- the "Goodbye, CallPilot" voice command
- easy switching between SAM commands and DTMF commands
- access to e-mail messages from a mobile phoneset

Mailbox owners can use the new voice command "Goodbye, CallPilot" to easily close their mailboxes when they are using a mobile phoneset.

No special configuration is required.

Mailbox owners using SAM can simply press a key to switch to DTMF commands and back again. Refer to the *Speech Activated Messaging User Guide*.

No special configuration is required.

For more information, look also for information on SAM in the CallPilot *Administrator's Guide* and in the Online Help.

Alternate phoneset interface

CallPilot can be configured to permit the use of an alternate phoneset interface that is similar to a widely-used command-based or menu-based phoneset interface. The advantage of the alternate phoneset interfaces is that the mailbox owners who are accustomed to a different interface do not have to learn unfamiliar phoneset commands.

Simplified installation

The CallPilot 2.02 installation comprises three phases:

- software installation
- database installation
- software and database configuration

The three-phase installation has the following advantages:

- You can restart each phase separately if a problem is encountered, not the entire installation process.
- You can complete the first two phases before the server is delivered to the client.

Improved product enhancement package/service update management

You can now remove all the product enhancement packages (PEP) and service updates (SU) in a single process. CallPilot 2.02 provides a consolidated PEP/SU utility. This enhanced utility offers improved installation and management.

Support for Windows XP on the client PC

You can install and use the CallPilot client application on a PC running Windows XP.

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