NØRTEL
NETWORKS

CallPilot ™

Release 2.5

Desktop Messaging User Guide

for Novell GroupWise

Business Communications Manager & CallPilot 100/150

Internet Clients

Page 7 Call the sender of a message

Call the sender of a message is not supported.

Page 7 Access web-based My CallPilot to view user information and change your feature settings

My CallPilot is not supported.

Page 8 About this guide

The internet mail clients that are supported are:

- Microsoft Outlook 2000, 2002 (XP) and 2003
- Lotus Notes - 4.6x, 5.x and 6.x (including 6.5)
- GroupWise - 6.x (including 6.5)
- Microsoft Outlook Express - 5.x and 6.x
- Netscape Messenger (Netscape Communicator) - 6.2x and 7.0x
- Qualcomm Eudora Pro - 6.0.1

Page 11 CallPilot Player

The Call the sender button is not available.

About forwarding Desktop Messaging messages

Do not use the right-click menu to forward a Desktop Messaging message. To forward a message, either:

- open the message and forward it from the CallPilot window

  or

- for Outlook, select the message in the Outlook Inbox and forward it from the Outlook toolbar.

About faxes

For CallPilot 100/150, fax functionality is not available in Desktop Messaging.

Viewing faxes

Imaging for Windows, which can be used as a fax viewer, is installed by default on Windows 95B, Windows 98, Windows NT, and Windows 2000 operating systems. But if you use Windows XP, Imaging for Windows is not included unless you have installed it. Ask your system administrator whether you have Imaging for Windows installed on your system.

If you use a Windows XP system and you do not have Imaging for Windows installed, you can view faxes in the default Windows XP fax viewer by double-clicking the fax. You can create one fax image at a time by using the fax driver.

Outlook, Lotus Notes, Groupwise

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The Call the sender button is not available.

Page 14 Composing fax and text messages

On the Compose Fax dialog box you can use the Subject field to add additional information to the fax cover page, for example the name of the recipient, when you send a fax directly to a fax machine. The maximum length you can enter in the Subject field is 80 characters.

Page 27 Calling the sender of a message

Calling the sender of a message is not supported.

Page 28 Setting message options

Delivery Receipt is not supported.

Page 34 Personal distribution lists

Group Lists are the equivalent of Personal Distribution Lists. Group Lists can be created by the system administrator only. Group Lists appear in the server address book with the letters "GL" after the group list name and cannot be created from the telephone.

Page 39 Linking to My CallPilot

Linking to My CallPilot is not supported.

CallPilot Desktop Messaging User Guide for Novell Groupwise

Product releases: 2.5

Document release: Standard 1.0

Date: October 2003

Contents

Welcome to CallPilot

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

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

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

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

Getting started

About this guide

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

The instructions and screen images shown in this guide provide general information for using CallPilot with your e-mail. Specific details may vary depending on your computer's operating system and the features available for your CallPilot mailbox.

For further assistance in using CallPilot, refer to the Desktop Messaging online Help.

What you need

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

- CallPilot Player to play and record voice messages
- Nortel Fax Driver to create faxes
- Novell GroupWise 5.5 or 6.x groupware e-mail client
- 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 voice messages on your computer
- A microphone connected to your computer, or a telephone situated near your computer, for recording voice messages
- A LAN (Ethernet), ISDN, ADSL, or dial-up modem connection to the CallPilot server for accessing CallPilot messages
- Internet Explorer 5.x and 6.x; or Netscape 6.2x and above, to access My CallPilot

Logging in

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

To log in from Novell GroupWise

1 Open your Novell GroupWise e-mail. The CallPilot Logon dialog box appears.

2 In **Mailbox**, type or select your mailbox number.

3 In **Password**, type your CallPilot password.

4 Check **Remember password** if you want CallPilot to log in automatically.

5 Click **OK**.

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

Note: CallPilot Desktop Messaging does not support multiple GroupWise logins to the same mailbox from more than one computer.

To log out

When you exit Novell GroupWise, you automatically log out from CallPilot.

Remote login

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

Working with your CallPilot messages

When you open your e-mail with CallPilot installed, your CallPilot messages appear in the CallPilot Desktop Messaging folder.

Your CallPilot Inbox

Compose new message

Message was received

Message was opened by the recipient

New message

Urgent message
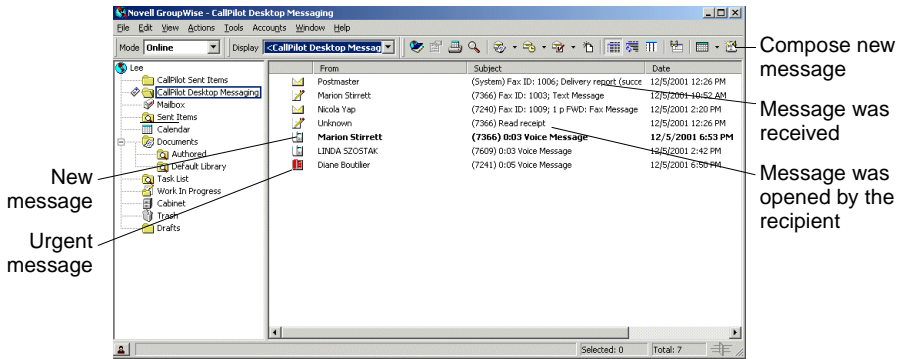
Note: If necessary, adjust your screen resolution so that the CallPilot New Message icon is visible on the GroupWise toolbar.

To check for new messages

The CallPilot message waiting indicator on your screen turns red when you have a new message. To turn the indicator on or off, see *Changing mail delivery settings*, page 33. New messages appear in bold.

To open a message

To open a CallPilot message, double-click the message line. See *Playing voice messages*, page 11, and *Viewing fax messages*, page 12.

To delete a message

To delete a CallPilot message in your Inbox, click the message to select it, then, on the **Edit** menu, click **Delete**. Or, in an open message, click the **Delete** icon. The message is deleted immediately. (You cannot delete a message using right-click >Delete and Empty.)

Playing voice messages

When you open a voice-only message, the CallPilot Player appears. In mixed voice and fax or text messages, click the Voice icon to open the CallPilot Player.

To select your telephone or computer to play voice messages

You can choose to play your voice messages from your telephone or your computer. To change from one to the other, or to change the telephone number that CallPilot dials, see *Changing audio settings*, page 36. You can also click the Telephone or Computer icon on the CallPilot Player to change the setting.

To play a message from your telephone

1 To play a voice message when your telephone is selected for playback, double-click the message in your CallPilot Inbox and answer your telephone when it rings.

2 Use the buttons on the CallPilot Player to play or stop the message, go backward and forward, and call the sender.

3 When you are finished, hang up and close the message.

To play a message from your computer

1 To play a voice message when your computer is selected for playback, double-click the message in your CallPilot Inbox. The message plays through your computer's speakers or your headphones.

2 Use the buttons on the CallPilot Player to play or stop the message, go backward and forward, adjust the volume and speed, and call the sender.

3 When you are finished, close the message.
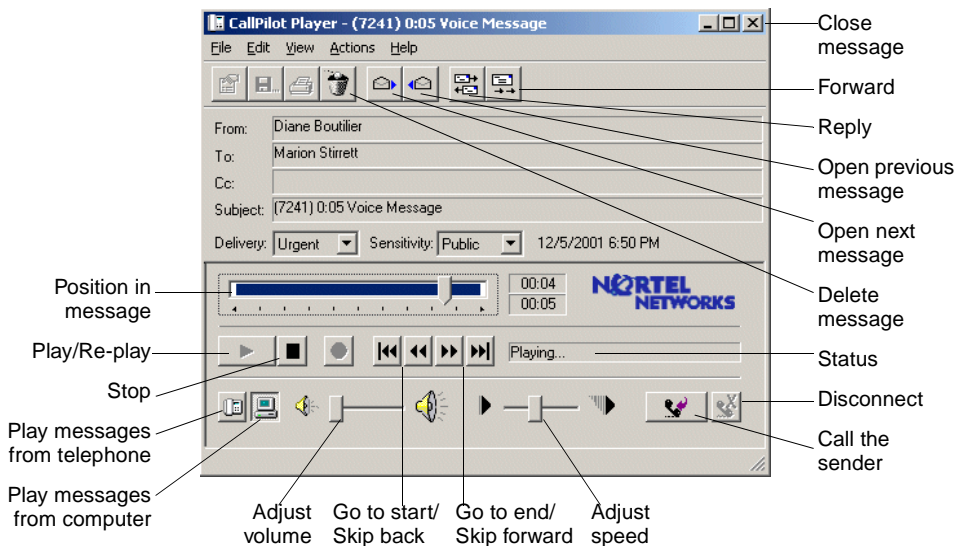
Viewing fax messages

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

To view a fax message

1 Double-click a fax message in your CallPilot Inbox. When you open a fax-only message, the fax image appears right away. In mixed voice and fax or text messages, click the **Fax** icon to view the fax.

2 While viewing the fax, you can enlarge or reduce the image, rotate or move it, print it, delete it, save it, forward it and reply to it.

3 When you are finished, close the message.
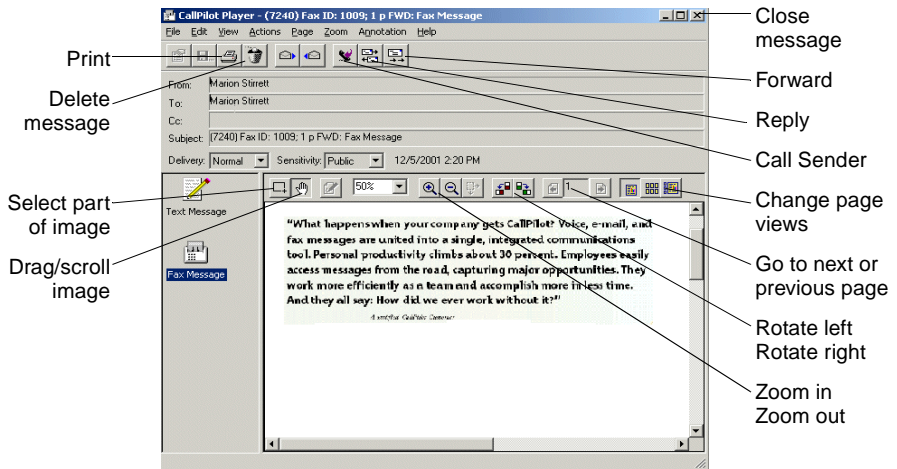
Composing voice messages

You can record a voice message from the computer or the telephone, then address and send it the same way as an e-mail message.

To record and send a voice message

1   In your CallPilot Inbox, click the **New CallPilot Message** icon 🖼️ .
2   On the new message form, click the **Telephone** icon in the toolbar to open the CallPilot Player, if it is not already open.
3   On the CallPilot Player, click the red **Record** button to start recording.
4   ▸ If you are recording from the computer, record your message into the microphone. Click **Stop** to end the recording. Click **Play** to review it. To add to the recording, click **Record**, speak again, then click **Stop**.
    ▸ If you are recording from the telephone, answer when it rings. At the tone, record your message. Click **Stop** to end the recording. Click **Play** to review it. To add to the recording or re-record it, move the playback slider to the desired position, click **Record**, speak again, then click **Stop**. Hang up the telephone.
5   Click **To…** to address from the CallPilot or Novell Address Book. See *Addressing messages*, page 29. Or type a formatted address in the **To...** field.
6   Add attachments and options if required. See *Adding attachments to messages*, page 28, and *Setting message options*, page 28.
7   On the toolbar, click the **Send Message** icon.
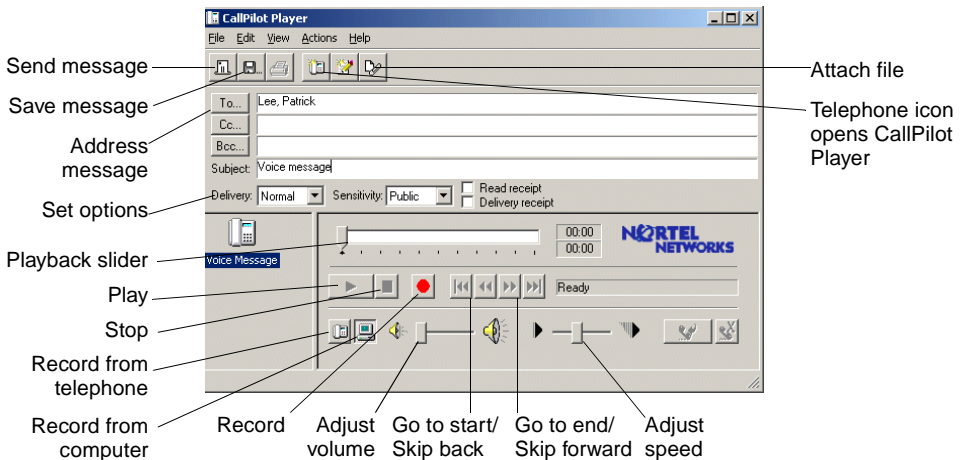
To save a newly created voice message as a file

1   On a new message form, record a message, and on the **File** menu, click **Save as...** .
2   In the **File** name box, type a name for the file, select a folder to keep the file in, then click **Save**. Save voice files as .vbk files. Note: CallPilot automatically converts .vbk files to .wav files when sending to non-CallPilot users. See *Changing mail delivery settings*, page 33.

Composing fax and text messages

To create and send a single fax message

To create a fax, your CallPilot mailbox must have fax capability. The CallPilot recipients of your fax must also have fax capability to view the fax on their computer. If your recipients access their messages from their telephone, they can view the fax only by printing it. You can also send your fax to a fax machine.

1 Open the document that you want to fax. It must be 8.5 in. (21.5 cm) wide or less.
2 On the File menu, select **Print**.
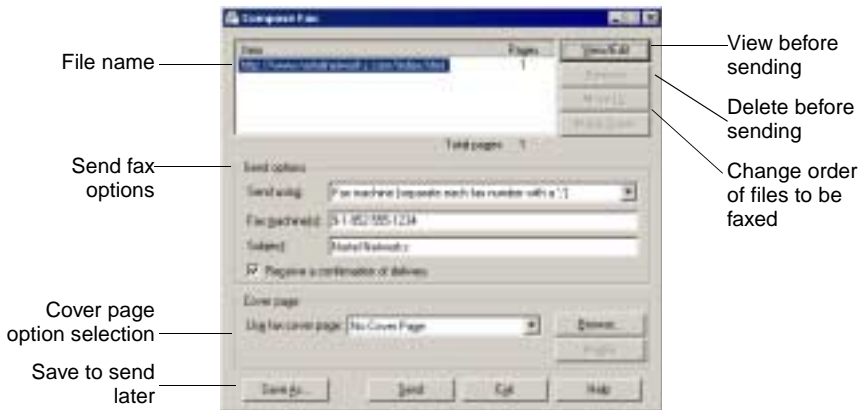3 From the list of printers, select **Nortel Fax**, then click **Print** or **OK**.
4 The Compose Fax dialog box appears. Before sending the fax, you can add more documents by repeating steps 1 to 3. You can also choose to include a cover page, view the fax, and save it as a file for later transmission.
5 Select an appropriate **Send using...** option.
▸ To send a simple fax, type the fax machine number(s) or CallPilot mailbox number ('m' plus number, for example m7366) in the **Fax machine(s)** field, type a subject in the **Subject** field, then click **Send**.
▸ To send your fax as an attachment to a new CallPilot message, select **CallPilot Desktop Messaging for Novell Groupwise** under **Send using**, then click **Send**

File name

Send fax options

Cover page option selection

Save to send later

View before sending

Delete before sending

Change order of files to be faxed

A new message form opens with your fax file attached. Address the message from the CallPilot or Novell Address Book. See *Addressing messages*, page 29. Or type the formatted address in the **To...** field.

6 Add attachments and options if required. See *Adding attachments to messages*, page 28, and *Setting message options*, page 28.
7 Click **Send Message**.

To create and send a text message

To create a text message, open a new CallPilot message form and type or paste plain text into it, address the message, then click the **Send Message** icon.

Creating and sending fax batch messages

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

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

Your Callpilot Desktop Messaging installation includes an example of a Microsoft Word data source named Data.doc and an example Microsoft Word main document named Sample.doc. Each of these are examined below to explain the batch fax procedure.

Accessing and modifying the example Data source document

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

1 Go to \Program Files\Nortel Networks\CallPilot\nda directory and open the Data.doc file.
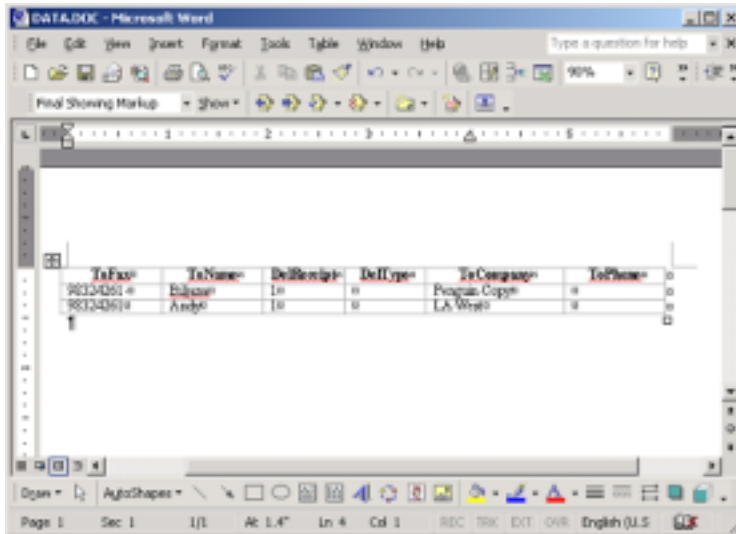
2 Add new columns or subtract existing ones, as required. For new columns, chose a meaningful column header name.

3 Add the required data under each column header. The data source can be created by any means available to populate a Microsoft Word table, including importing information from existing files.

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

The following parameters and characters are supported in the **ToFax** field:

- Maximum supported length for the fax phone number is 120 characters.
- Numbers 0 through 9 are supported.
- Upper and lower case P and the comma are used when a pause is necessary.
- The Pound sign (#) is used by some fax servers and is supported.
- Common phone number symbols such as left and right parentheses and the dash are supported.
- Spaces are supported.
- Upper and lower case M used in front of a CallPilot mailbox number to designate the address as a CallPilot mailbox are supported.

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

- **ToName:** This is the fax recipient's name and can be up to 256 characters in length.
- **DelReceipt:** You can use this tag to receive a Delivery Receipt in the form of a CallPilot message in your CallPilot mailbox when the fax is delivered to the recipient. If the DelReceipt field is set to "1", then a delivery receipt will be generated. If DelReceipt is set to '0', a delivery receipt will not be generated for that recipient. If the DelReceipt field is empty or the field is not in Data.doc, then no delivery receipt will be generated.
- **DelType:** This field may be used to set a delivery priority for each recipient. If the DelType field is set to '0' or is left empty (or if it is not present in your Data.doc), the message will be tagged for Normal delivery. If DelType is set to "1", then the message will be tagged for Economy delivery. If DelType is set to "2", then the message will be tagged for Urgent delivery. Messages sent to non-CallPilot recipients with the Delivery Type set to Economy will be delivered on a schedule defined by the CallPilot server for Economy delivery. Note that messages sent to CallPilot mailboxes will not be affected by the Economy designation and will be sent as Normal messages. Transmission of messages tagged as Normal or Urgent will begin immediately. Urgent messages will display the Urgent icon when displayed

from My CallPilot or a Desktop Messaging client and a voice prompt will identify the message as Urgent from the CallPilot telephone interface. Messages sent Urgent are treated as Normal when they are sent to non-CallPilot addresses.

4 Once the table has been updated, save all changes. You would normally supply a unique name for your data file here, but for the remainder of these procedures the name Data.doc will be used.

5 Close the document. The Data.doc file can now be used as a data source by MS Mail Merge.

Accessing and modifying the example Main document

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

1 From the \Program Files\Nortel Networks\CallPilot\nda directory, open Sample.doc in MS Word.

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

First page

The first page of the main document is a special page and does not become part of the final fax. Sample.doc is installed with the first page setup correctly.
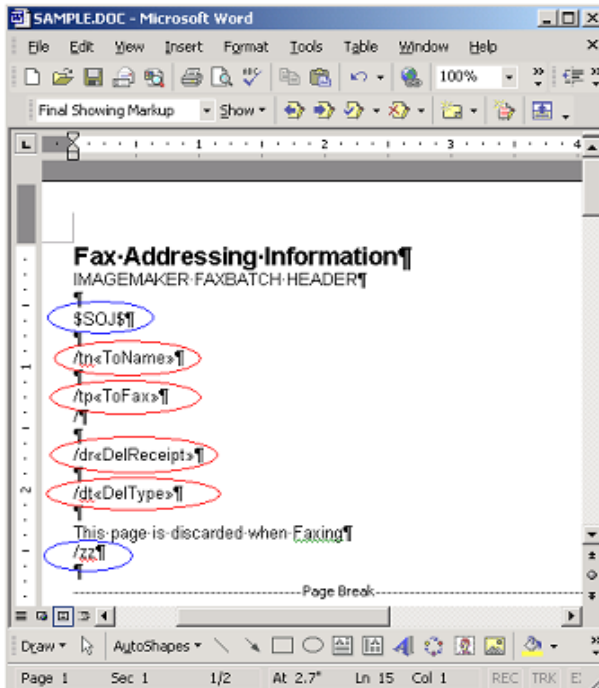
The purpose of this page is to provide a location to map information in the data source to each customized fax document. To signal CallPilot that this as a Fax Batch file and to prevent this page from becoming part of the fax, two special control codes **must** be present on the first page:

SOJ	Start of Job. This control signals the fax driver to start processing and can be placed anywhere on the first page.
/zz	Skip this page. This control can be placed anywhere on the first page and prevents the first page from becoming part of the fax message.

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

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

To complete the page, the Fax Number column header (i.e. <<ToFax>>) must be inserted after the /tp control using the Mail Merge insert function. Likewise, the Delivery Receipt column header (i.e. <<DelReceipt>>) may be inserted after the /dr control, the Name of Recipient field (i.e. <<ToName>>) may be inserted after the /tn control and the Delivery Type field (i.e. <<DelType>>) may be inserted after the /dt control.

Note: all Fax Batch controls are case sensitive.

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

/tp9<<ToFax>>

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

Second page
Once the data source document and the first page of the main document have been created, you can begin to customize your fax. Note that it must be equal to or less than 8.5 inches in width.

You can use all of the data source column header tags to customize the document. The following is an example using the Sample.doc file:
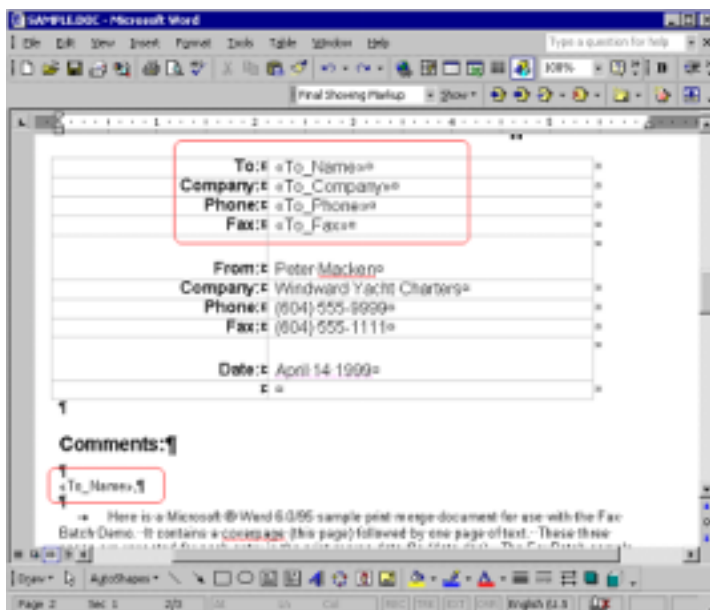
In this example, the document is customized for each recipient. Data source column headers are inserted into the document using the MS Word Mail Merge utility Insert function. After the main document has been customized, it is ready to be merged with the information in the Data.doc file. Consult your MS Word Mail Merge help for more details on inserting data source fields into the document.

Merging data from the Data Source into the Main Document

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

1 Start **Mail Merge** from the MS Word **Tools** menu. Depending on which version of MS Word you are using, Mail Merge will be under different menu headings.

   a. In the Office XP version, select **Tools>Letters** and **Mailings>Mail Merge Wizard**.

   b. In Office 2000 select **Tools / Mail Merge.**

2 Verify that Sample.doc is currently selected as the main document and that Data.doc is currently selected as the data source.

3 Select **Merge to Printer** and then select the **Nortel Fax Batch** driver from the Print dialog box that appears.
   Note: Ensure that MS Word is not set up to print pages in reverse order.

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

When the document is merged, data values from the data source file will be merged into the main document at the appropriate tag positions and a separate fax TIF file for each recipient is created. CallPilot desktop software will address and transfer the fax files to the server. The CallPilot server is responsible for actually sending the fax to the recipients.

Once the process starts, the Print Status dialog appears. The page number increments as each page is converted to a TIF file. Since the first page is skipped, this page is not included in the count. For example, if a three page fax is sent to 10 recipients, the dialog box will display "Printing page 1", "Printing page 2", and so on up to "Printing page 20." Only 20 pages are printed because the first page of each document is skipped.

Problems that occur while creating the fax images or with the fax addresses will be displayed in a separate Nortel Fax Batch Status dialog box such as:


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

When you click the OK button, the batch process ends and no faxes are sent. You must then fix the fax address(es) and resubmit the job.

If all faxes and addresses were created properly, a dialog appears while the faxes are being addressed and transferred to the CallPilot Server. It indicates the status of the batch job. If you press Cancel in this dialog box before the job is completed, another dialog box appears asking you to confirm the cancellation. If you select Yes, all temporary files will be deleted and the process ends. However, all faxes that have already transferred to the CallPilot server will be sent.

If a problem occurs while transferring the fax, a dialog similar to the following appears:
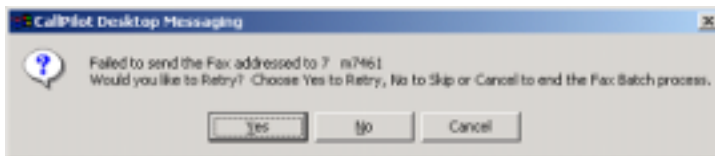
If you select Yes, an attempt is made to resend the fax to the server. If you select No, the current fax is skipped and processing begins on the next fax in the list. The fax that was skipped will not be sent. If you select Cancel, another dialog box appears asking you to confirm the cancellation. If you choose Yes, all temporary files will be deleted and the process ends. Any faxes that have already been transferred to the CallPilot server will be sent. If you choose No, the failure dialog box shown above will be displayed again, allowing you to make a different choice.

After all the faxes have been successfully transferred to the server, a dialog box will confirm this.

Using custom fax Cover Pages

Callpilot users can choose to include a cover page with their faxes. These are typically designed and managed by the server administrator. The user simply chooses the desired style of cover page (if more than one is available).

Cover pages generally include the following information:

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

Number of Pages

Sent Date & Time

A Cover Sheet Memo section

CallPilot Configuration

The CallPilot Desktop Messaging Configuration page includes an option labelled "Include cover page when forwarding fax message". The default value for this is unchecked, meaning that a cover page will not be added to the message.
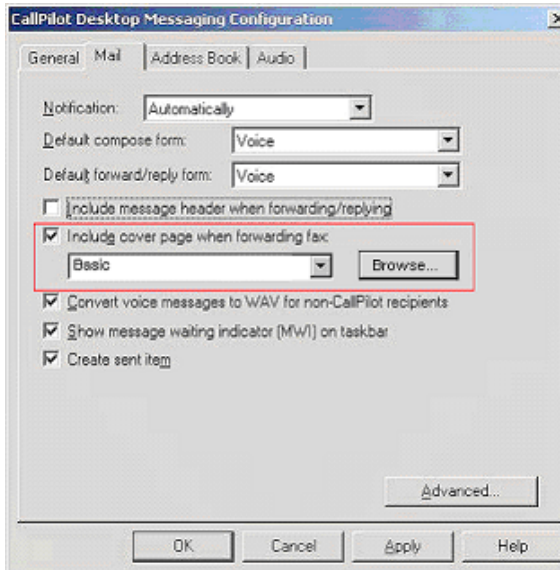


If you select this option, you can then choose and set a default cover page from a list of available cover pages. Use the **Browse…** button to choose the location where the cover pages are stored. The default location is: \\Program Files\Nortel Networks\ CallPilot\cvrpages.

CallPilot Desktop Messaging Custom form

The CallPilot Desktop Messaging Custom Fax Forward form contains a menu item named **Cover page**, which contains two submenus items: **Add** and **Modify**.
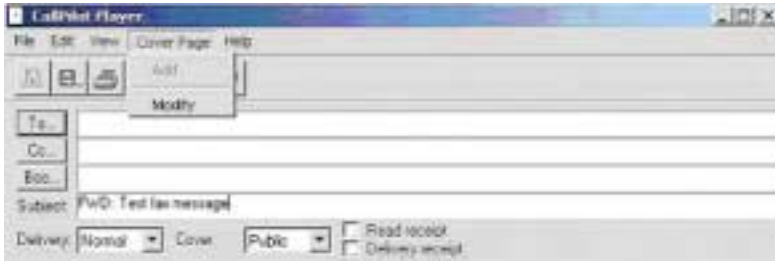

The **Add** menu displays a list of existing cover pages available to use. You can select one of these and click **OK**.
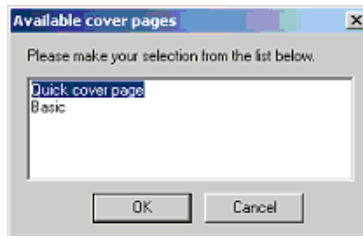
The **Modify** menu displays the current cover page content and lets you modify it. Refer to Modify and Preview cover page on page 25 for details. From the "Modify" window, you can also preview the current cover page.

If you enabled the **Include cover page…** option, CallPilot Desktop Messaging will add the selected cover page to the Fax Forward form. The cover page will appear as the first attachment on the list of attachments (left pane). The Attachment's view (right pane) will contain only the Cover Sheet Memo section of the cover page. You can include any additional required information here.
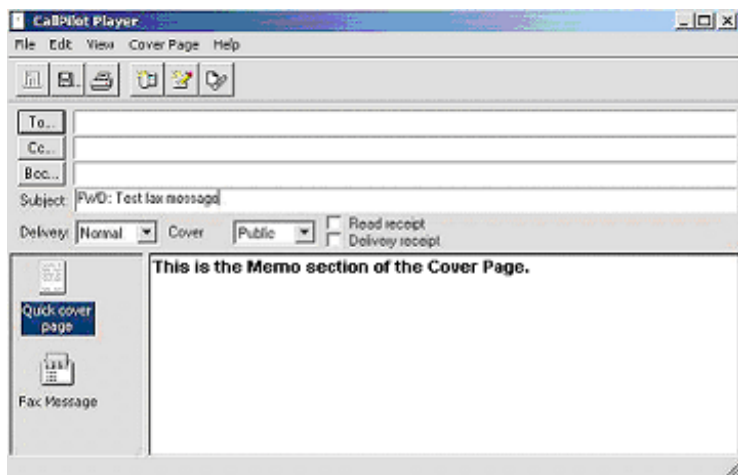
Nortel Fax Printer Driver form

You can use the Nortel Fax Printer form to send a fax message using either a CallPilot Desktop messaging client (such as Novell GroupWise) or the QuickFax feature. The QuickFax feature allows you to send a fax directly from the print dialog box. If you choose to send your fax using a CallPilot Desktop Messaging client, the **Cover page** option will be greyed out here, but will be available from the CallPilot Custom form.
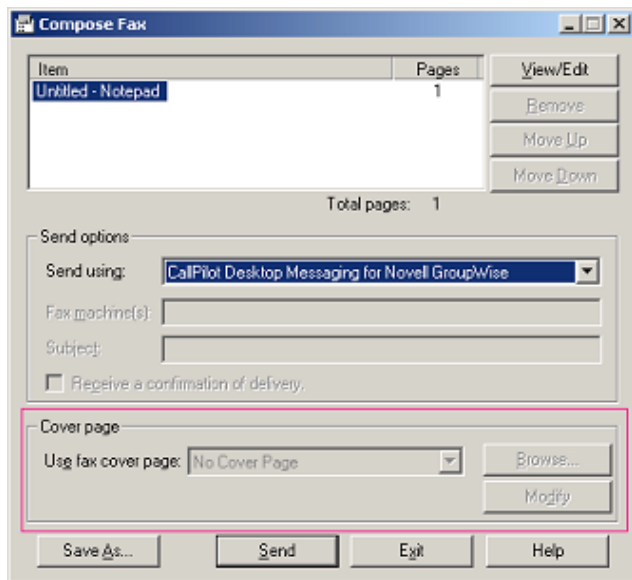
If you choose to send your fax to a specific destination (for example, a fax machine), the **Cover page** field becomes active and lets you browse for a cover page and/or select one from the dropdown list. You can then modify its contents. This provides functionality similar to the Custom form. (Refer to the following section for details.) You can also choose not to include a cover page by selecting the **No cover page** option from the **Use fax cover page** dropdown list.

Note that you can also include a Subject line here. The Subject field information will however only be displayed in the e-mail portion of the fax. It will not be displayed on a hard copy of the fax.

Modify and Preview cover page

You can preview the current cover page and modify its contents from both the CallPilot Custom form and the Nortel Fax Printer driver application.
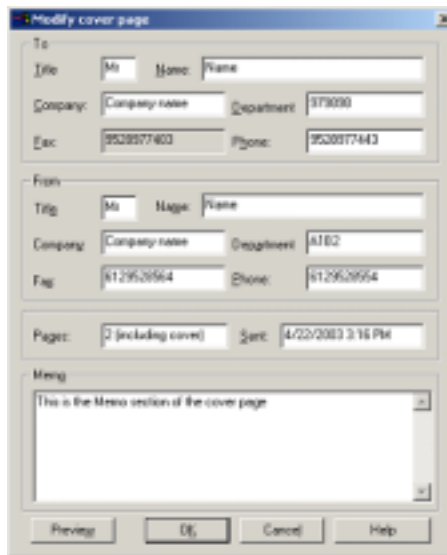
Click on **Preview** to view the current state of the cover page.
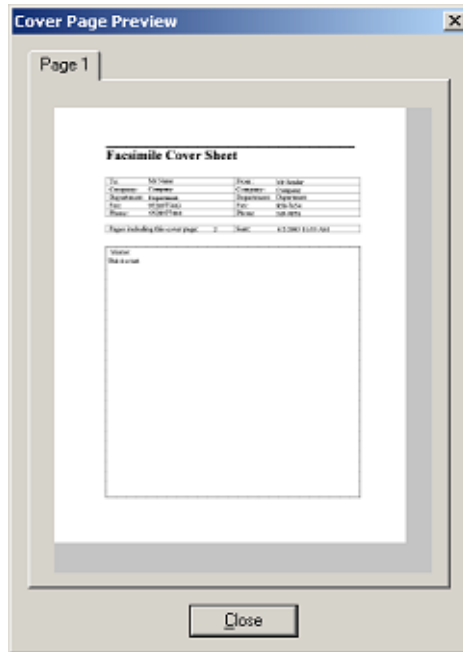
The first time you access this page, CallPilot Desktop Messaging will try to fill in the From section using information from the registry. Desktop Messaging will remember the data that you entered into this section and automatically complete those fields the next time you use this page. Although the From information is automatically populated from the registry, you can still change it.

In the To section, one field will always be read only - the Fax field. CallPilot will populate it using address information from the Custom or Fax Driver forms. The Name field is read-only if the cover page is used from the Custom form. In this case, CallPilot will automatically fill it using the recipient's name. If you use the Fax Printer driver instead, this field is left empty and you can complete it.

If a cover page is used from the Fax Printer driver, CallPilot Desktop Messaging computes the number of pages and enters this information in the Pages field. When you use the Custom form, the Pages field is left empty. You can modify this field in either case.

The Sent field uses the current time and date by default. This field is also editable.

The Memo section is in synch with the Memo section of the Custom form.

Note that the maximum length of all cover page fields except the Memo field is 30 characters. The maximum length of the Memo field is 2500 characters.

Calling the sender of a message

You can respond to a message with a telephone call instead of a recorded message.

1   In an open message, click **Call Sender** [icon] .
2   Answer the telephone when it rings. CallPilot immediately calls the sender of the message.
3   When you finish the call, hang up the telephone or click **Disconnect** [icon].

Forwarding and replying to messages

You can forward a message, and compose an introduction to send with it. You can also compose a reply to the sender of a message, or to the sender and all recipients of a message.

To forward or reply to a message

1   In an open message, click **Forward** or **Reply**.

[icons]
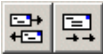
2   If you click **Reply**, select **Reply to Sender** or **Reply to Al**l.
3   On the new message form, compose a voice, fax, or text message.
4   Address forwarded messages the same way as a new message. Replies are addressed automatically.
5   Add attachments, set options, and change the subject line if required.
6   Click the **Send Message** icon.
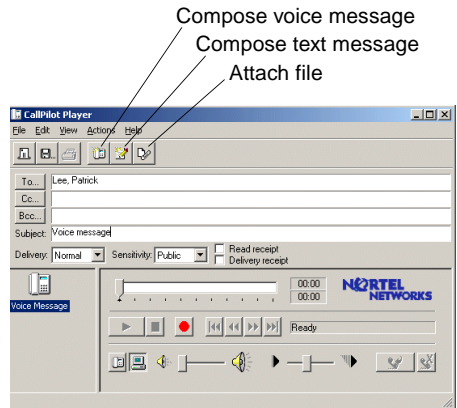
Note: Your administrator may block messages forwarded to external e-mail addresses.

Compose voice message
Compose text message
Attach file

Adding attachments to messages

Before sending a message, you can attach a voice, fax, or text file to it. Voice files can be .vbk or .wav format for CallPilot recipients; CallPilot can automatically convert .vbk files to .wav files when sending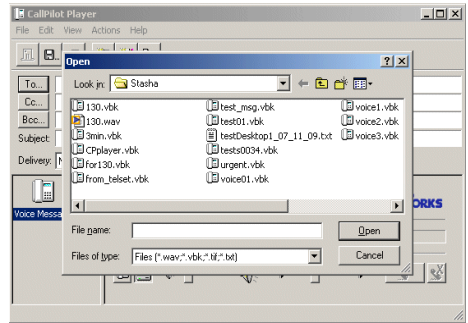 to non-CallPilot users. See *Changing mail delivery settings*, page 33. Fax files must be .tif format. Text files must be .txt format.

To attach a file to a message

1 On a new message form, click the **Attach File** icon.

2 In the **Open** box, select or type the name of the file that you want to attach.

3 Click **Open** to attach the file and return to the new CallPilot message.

Setting message options

Before sending a message, you can set options for handling and delivery.

To set message options

1 On a new message form, select **Delivery, Sensitivity**, and **Receipt** options, as required.

▶ For **Delivery**, select **Urgent**, or leave the setting as **Normal**.

▶ For **Sensitivity**, select **Private**, or leave the setting as **Public**.

Note that when you send a message marked **Private**, your recipient may still forward it to someone else, if they are not a CallPilot user. Also, recipients in non-CallPilot systems will not be informed of Private settings. In your message, tell the recipient that the message is Private.

▶ For Receipt acknowledgment, check **Read receipt** to request acknowledgment that your recipient opened the message. Check **Delivery receipt** to request acknowledgment that your recipient received the message.

2 Continue to compose, address, and send the message as usual.

Addressing messages

To address a message from an Address Book

You can address a CallPilot message from the CallPilot Address Book on the server, or you can select addresses from any available Address Book.

- The CallPilot Address Book on the server is maintained by your organization, and contains the addresses of the CallPilot users and distribution lists that you are allowed to use. You cannot edit this list. You can download the Address Book to your computer so that you can work in offline mode. See *Changing your address book settings*, page 35.

- Your Personal Address Book is the list of e-mail addresses that you maintain on your computer. You can add CallPilot addresses to this list.
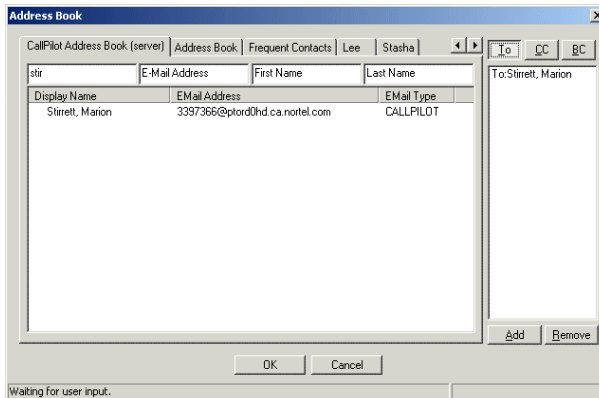
1. In a new CallPilot message, click **To…** .
2. In the **Address Book** window, select the **CallPilot Address Book** tab or any other available **Address Book**.
3. Select the name of the recipient or distribution list.
4. Click **To ->**. You can select more addresses, clicking **To ->** after each one.
5. Click **OK** to return to the new CallPilot message.

To add CallPilot addresses to your Novell Personal Address Book

You can add CallPilot addresses and distribution lists to your Personal Address Book. You may want to distinguish between CallPilot and e-mail addresses by adding CallPilot after the recipient's name.

1. In your Inbox, on the **Tools** menu, click **Address Book**.
2. Select **CallPilot Address Book**, and right-click on a name.
3. Click **Copy Names between Address Books**, then select an Address Book.

Or, you can create an address manually and add it to your Personal Address Book. To do this, set the **E-mail** type to **Callpilot**.

To address a message manually

You can type an address directly into the **To** field of a new message.

Required format for a CallPilot E-mail address

If you choose to enter a CallPilot address in the E-mail field, it must be entered in the following format:

[CALLPILOT:XXXXYYYY@ZZZZ]

Where:
XXXX = SMTP/VPIM prefix
YYYY = CallPilot Mailbox number
ZZZZ = CallPilot Server FQDN (server and domain)

For example, suppose CallPilot server "na42349" in the domain "us.nortel.com" with VPIM/SMTP prefix "1952897" contains mailbox "7404". Then the CallPilot address for that mailbox would be:

[CALLPILOT:19528977404@na42349.us.nortel.com]

Required format for Fax and Telephone Numbers

If you choose to enter a fax or telephone number in the contact field(s), it must be entered as an alphanumeric string. Pause (P p ,) and octothorpe (#) characters are supported.

The required format is:

[CALLPILOT:XXXX@ZZZZ]

Where:
XXXX = Telephone or fax number
ZZZZ = CallPilot Server FQDN (server and domain)

Examples of valid fax and telephone number formats are:

[CALLPILOT:7404@na42349.us.nortel.com]
[CALLPILOT:(416) 697-7321@na42349.us.nortel.com]
[CALLPILOT:(416) 697-7321,7404@na42349.us.nortel.com]
[CALLPILOT:(416) 697-7321p7404@na42349.us.nortel.com]
[CALLPILOT:(800) 921-1342#123123@na42349.us.nortel.com]

Personal distribution lists

There are two types of Personal Distribution Lists (PDL) you can use:

- CallPilot PDL, which can be created using My CallPilot or the telephone.
- Local distribution lists which can be created from GroupWise in personal address books. Note that this type is not accessible from telephone interface.

To use existing CallPilot personal distribution lists

You can address messages using CallPilot personal distribution lists that you created in My CallPilot or on your telephone. In GroupWise, select these lists from the CallPilot Address Book or add them to your Personal Address Book.

To create a personal distribution list in GroupWise

You create a CallPilot personal distribution list in GroupWise the same way that you create an e-mail personal distribution list. You cannot access a list created in GroupWise from your telephone or from My CallPilot.

1 In your Inbox, on the **Tools** menu, click **Address Book**.
2 Select **CallPilot Address Book** or your **Personal Address Book**.
3 Select names, clicking **To...** after each one.
4 When you have finished entering names, click **Save Group**.
5 In **Save as Group**, type a name for the list, then click **OK**.

To edit a personal distribution list

You can add or delete names in a personal distribution list.

1 In your Inbox, on the **Tools** menu, click **Address Book**.
2 Click **Information**, then **Edit Group**.
3 Make the required changes, then click **OK**.

Changing your mailbox settings

To view or change your CallPilot access settings

Your administrator enters the default CallPilot access information for you. You can change these settings if required. Refer to the online Help for a detailed explanation.

1 In your e-mail Inbox, on the **Tools** menu, click **CallPilot Desktop Messaging > CallPilot Desktop Messaging Options**.
(Or, on the CallPilot Player, select **View > Options**.)

2 Click the **General** tab to display your current access settings.

3 Make any changes required, then click **OK**.
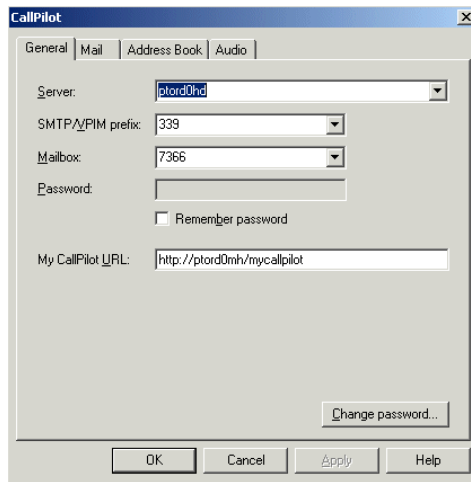
To change your CallPilot password

This is the same password that you use from the telephone.

1 Repeat steps 1 and 2 above, then click **Change Password**.

2 In the **Old password** field, type your current password.

3 In the **New password** field, type your new password.

4 In the **Retype new** field, type your new password again.

5 Click **OK** to save the change.

**6** Click **OK** to exit the General settings.

Changing mail delivery settings

To view or change your mail settings

Your administrator enters the default mail settings for you. You can change them if required. Refer to the online Help for a detailed explanation.

1 In your e-mail Inbox, on the **Tools** menu, click **CallPilot Desktop Messaging > CallPilot Desktop Messaging Options**.

2 Click the **Mail** tab to display the current mail settings.
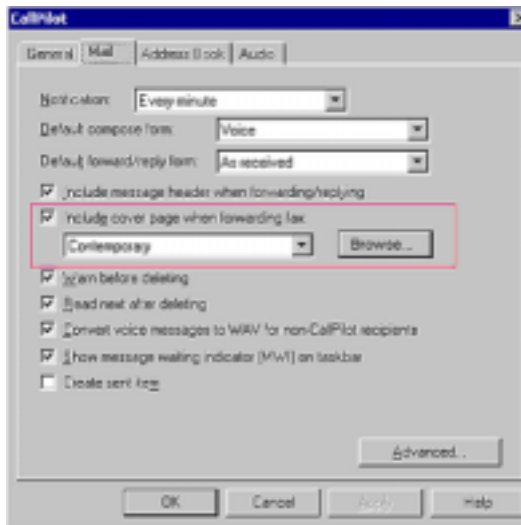
3 The default settings shown here are recommended for most users.

- Notification - You can set CallPilot to update your message list automatically, manually, or at intervals such as every 5 minutes. (Choose Manually to save costs on long distance or ISDN connections.)

- Default compose form - Lets you choose what type of e-mail form to use in composing your new message.

- Default forward/reply form - Lets you choose what type of e-mail form to use in forwarding or replying to a message.

- Include message header when forwarding/replying - The header information of the original message appears in a reply or forwarded message.

- Include cover page when forwarding a fax - Refer to the CallPilot Configuration on page 22 for information regarding adding and/or modifying cover pages.

- Warn before deleting - Will prompt you for confirmation when you delete a message.

- Read next after deleting - Will open up your next message after you delete the current one.

- Convert voice messages to WAV for non-CallPilot recipients - Your recorded messages are automatically converted from .vbk to .wav files when you send them to non-CallPilot users.
- Show message waiting indicator (MWI) on taskbar - The CallPilot telephone icon on the Windows taskbar turns red when you have a new message.
- Create sent item - Will create a copy of any messages that you send and place them in your Sent folder.

4 Make any changes required, then click **OK**.

Changing your address book settings

To view or change your Address Book settings

Your administrator enters the default Address Book settings for you. You can change them if required. Refer to the online Help for a detailed explanation.

1   In your e-mail Inbox, on the **Tools** menu, click **CallPilot Desktop Messaging > CallPilot Desktop Messaging Options**.
2   Click the **Address Book** tab to display the current Address Book settings.
3   Make any changes required, then click **OK**.
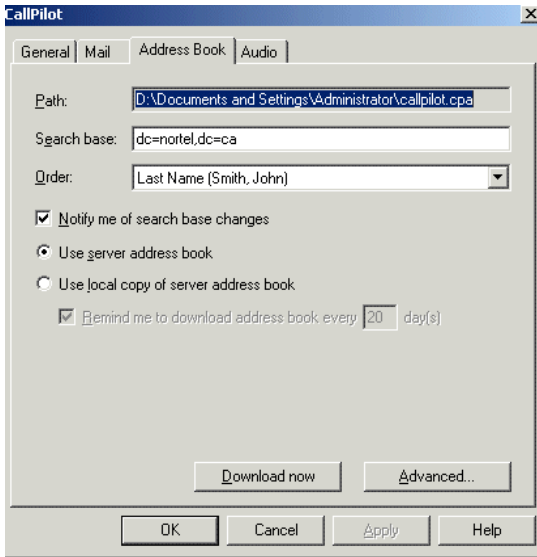
To download the Address Book to your computer

You can download the CallPilot Address Book from the server to your computer so that you can work offline.

1   Select the **Address Book** tab as previously described.
2   Click **Download now**. The server address book downloads to your computer.
3   Select **Use local address book**. From now on, when you click **To…** in a CallPilot message, whether working online or offline, you go to the address book that you downloaded to your computer.
4   Check **Remind me…** to remember to update this list by downloading it from the server occasionally. Set the number of days between reminders.
5   Click **OK**.

Whenever you want to address directly from the server again, reselect **Use server address book**.

Changing audio settings

To change the audio device and volume

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

1   In your e-mail Inbox, on the **Tools** menu, click **CallPilot Desktop Messaging > CallPilot Desktop Messaging Options**.
    (Or, on the CallPilot Player, select **View > Options**.)

2   Click the **Audio** tab to display the current Audio settings.
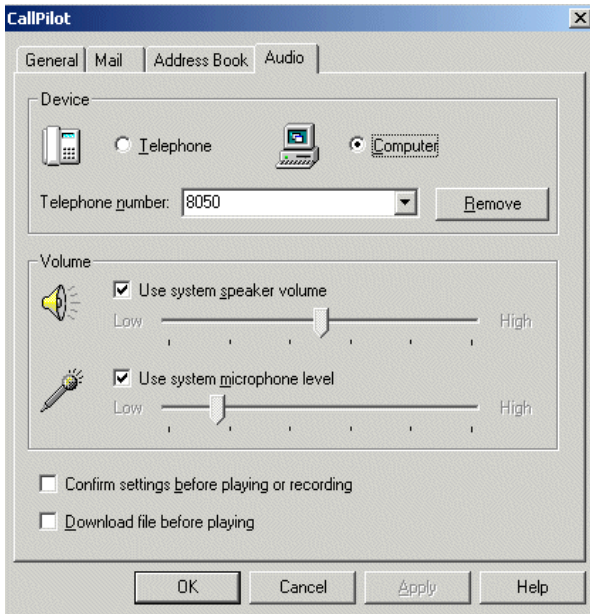
3   In **Device**, click **Telephone** if you want to play and record your voice messages from your telephone. Make sure the correct telephone number appears.
    Or, click **Computer** if you want to play and record your voice messages through your computer's speakers and microphone.
    Note: You can also change your audio device on the CallPilot Player.

4   In **Volume**, check the two **Volume** check boxes if you want to coordinate your CallPilot volume settings with your computer's speaker and microphone volumes.

5   If you want a reminder to check these settings before playing or recording voice messages, check **Confirm settings...** .

6   If you want to download voice messages to your computer before playing them, check **Download file...** . This option is useful if you are using a modem.

Linking to My CallPilot

Desktop Messaging provides links to the web-based resources in My CallPilot. To view or change the URL for My CallPilot, see *Changing your mailbox settings*, page 32. For more information on My CallPilot, refer to the *My CallPilot User Guide*.

1 In your e-mail Inbox, on the **Tools** menu, click **CallPilot Desktop Messaging > My CallPilot**.

**2** Select one of the tabs.

To view or change your CallPilot feature settings

1 In My CallPilot, click the **CallPilot Features** tab.

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

To view user information

In My CallPilot, click the **Useful Information** tab to view online user information specific to your mailbox.
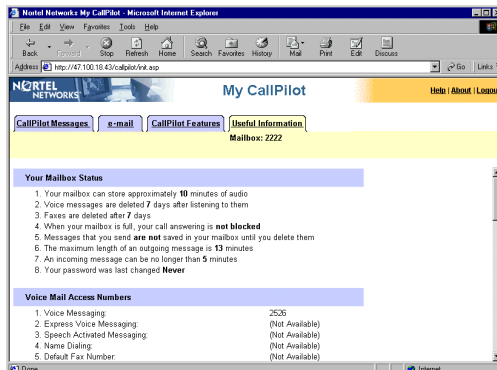
Working offline

To work offline, you need a computer that has CallPilot installed and configured in the same way as your office computer. You can download your messages and addresses to this computer before working offline.

1 (Optional) You may want to download your CallPilot messages to the computer that you will use offline. Log in to your e-mail and CallPilot, and on the Tools menu, click **CallPilot Desktop Messaging**, then click **Download all CallPilot Messages**. When your messages are downloaded, log out.

2 (Optional) You may want to download the server Address Book to your computer. See *Changing your address book settings*, page 35.

3 Open your e-mail while not connected to the network, and wait for the CallPilot Logon window to appear. You do not need to enter your password.

4 Click **Cancel**.

You can then work offline, reviewing your messages and recording and addressing new messages. You must use your computer's speakers and microphone to play and record messages offline; you cannot use a telephone for offline access. CallPilot will send your messages the next time you log in to the CallPilot server.

CallPilot Desktop Messaging User Guide
for Novell GroupWise

This user guide is distributed in soft copy only.

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