NØRTEL NETWORKS™

CallPilot™

Release 2.5

Desktop Messaging User Guide

for Lotus Notes

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

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 11 CallPilot Player

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 Lotus Notes

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 Lotus Notes 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.
- 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 CallPilot 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 Lotus Notes e-mail.

The instructions and screen images shown in this guide provide general information for using CallPilot with 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 meet the following configuration requirements:

- CallPilot Player to play and record voice messages
- Nortel Fax Driver to create faxes
- Lotus Notes 5.xx and 6.xx 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

Operating in a Citrix Thin Client environment from a Windows Terminal Server

Once the administrator has installed CallPilot Desktop Messaging on the Windows Terminal Server and updated mail databases on the Domino server, Citrix Thin Client users can run the CallPilot-enabled Lotus Notes client.

When a Lotus Notes Client starts for the first time after the server configuration is completed, CallPilot Desktop messaging detects updated mail database, makes all required modifications in the Lotus Notes client initialization file (NOTES.INI) and prompts the user to finalize the configuration by restarting the Lotus Notes client.

Logging in

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

To log in from Lotus Notes

1 Open your Lotus Notes e-mail.
   The CallPilot Logon dialog box appears when you open CallPilot Desktop Messaging in Lotus Notes 5.xx or later.

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 Lotus Notes logins to the same mailbox from more than one computer.

To log out

When you exit your Lotus Notes e-mail, 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.

Multiple Lotus Notes mail database support

CallPilot allows a Lotus Notes user to change mail databases on the fly, either at startup or during an active session.

Startup

If you open a different mail database on Lotus Notes client startup than the one you used in your previous session, CallPilot Desktop Messaging detects this and synchronizes to the new database automatically.

Changing your mail database during the active session

You can also change the mail database you are using during the currently active Lotus Notes and CallPilot session (that is, when you are logged on to a Lotus Notes mail database and are an active CallPilot client).

You change the mail database by either:

1   *Accessing the CallPilot Desktop Messaging view in the different Lotus Notes mail database.* CallPilot Desktop Messaging detects this and warns you that CallPilot is connected to a different mail database. If you choose to connect to the other database, click the Yes button in the dialog box and CallPilot will synchronize to the new mail database. If you answer No, no synchronization occurs. To use CallPilot in this case, you have to switch back to the mail database that CallPilot Desktop Messaging is already synchronized with.

    OR

2   *By trying to run CallPilot commands (that is, open a message, use menu items, etc.) in a mail database different from the one CallPilot is already synchronized with.* CallPilot Desktop Messaging detects this and warns you that CallPilot has to synchronize with the new mail database before implementing the command. When you click on OK, the synchronization occurs and when it is complete, you can run the CallPilot command again.

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
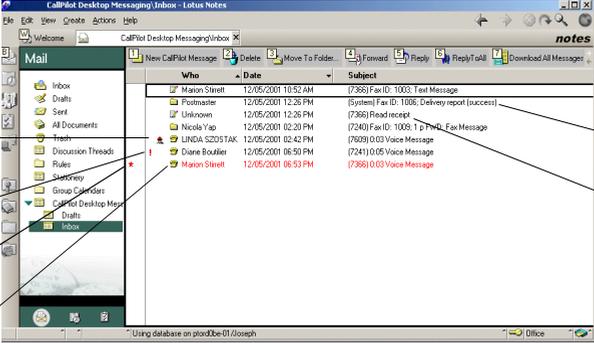
Private message

Urgent message

New message

Attached files (voice, fax, text)

Message was received

Message was opened by the recipient

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*, on page 36. New messages appear in red.

To open a message

To open a CallPilot message, double-click the message line. See *Playing voice messages*, on page 12, and *Viewing fax messages*, on page 13.

To delete a message

If you are using Lotus Notes 5.xx to mark a message for deletion, click on a CallPilot message in your Inbox to select it, then click the **Delete** icon on the toolbar. To permanently delete messages, select the **Actions** menu, click **Empty Trash**. In Lotus Notes 6.xx, the message is deleted as sson as you click on **Delete**.

*Note: You can delete a message immediately by clicking the **Delete** icon in an open CallPilot message.*

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*, on page 39. 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 have finished, close the message.
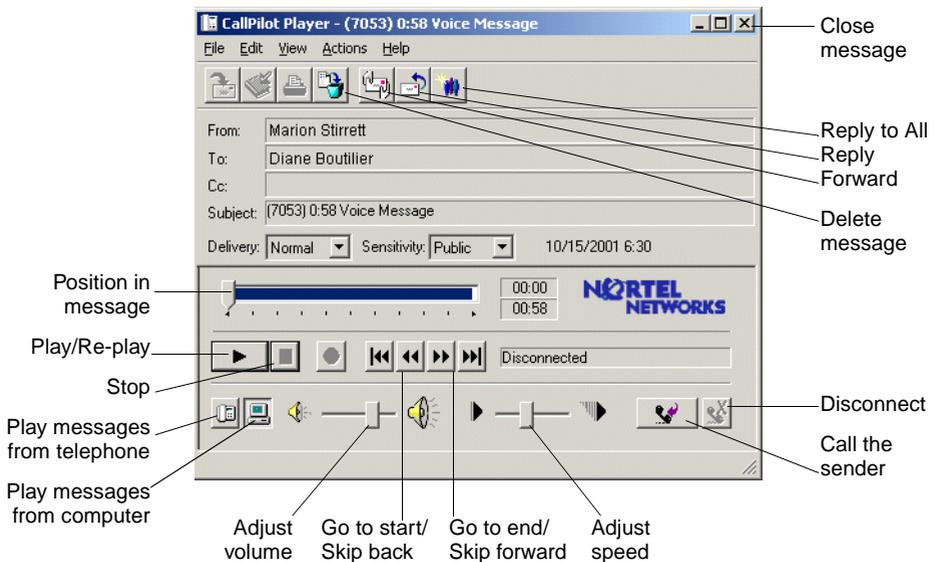
Viewing fax messages

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 have finished, close the message.

Labels around the CallPilot Player window:
- Print
- Delete message
- Close message
- Reply to All
- Reply
- Forward
- Select part of image
- Drag/scroll image
- Change page views
- Go to next or previous page
- Rotate left / Rotate right
- Zoom in / Zoom out

Window contents:

CallPilot Player - (7240) Fax ID: 1009; 1 p FWD: Fax Message

File Edit View Actions Page Zoom Annotation Help

From: Marion Stirrett
To: Marion Stirrett
Cc:
Subject: (7240) Fax ID: 1009; 1 p FWD: Fax Message
Delivery: Normal   Sensitivity: Public   12/5/2001 2:20 PM

"What happens when your company gets CallPilot? Voice, e-mail, and fax messages are united into a single, integrated communications tool. Personal productivity climbs about 30 percent. Employees easily access messages from the road, capturing major opportunities. They work more efficiently as a team and accomplish more in less time. And they all say: How did we ever work without it?"

A satisfied CallPilot Customer

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** button.

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 an address book. See *Addressing messages*, on page 30. Or type a formatted address in the To... field.

6   Add attachments and options if required. See *Adding attachments to messages*, on page 29, and *Setting message options*, on page 29.

7   On the toolbar, click the **Send Message** icon.

Send message
Save message
Address message
Set options
Playback slider
Play
Stop
Record from telephone
Record from computer
Attach file
Telephone icon opens CallPilot Player
Record
Adjust volume   Go back   Go forward   Adjust speed
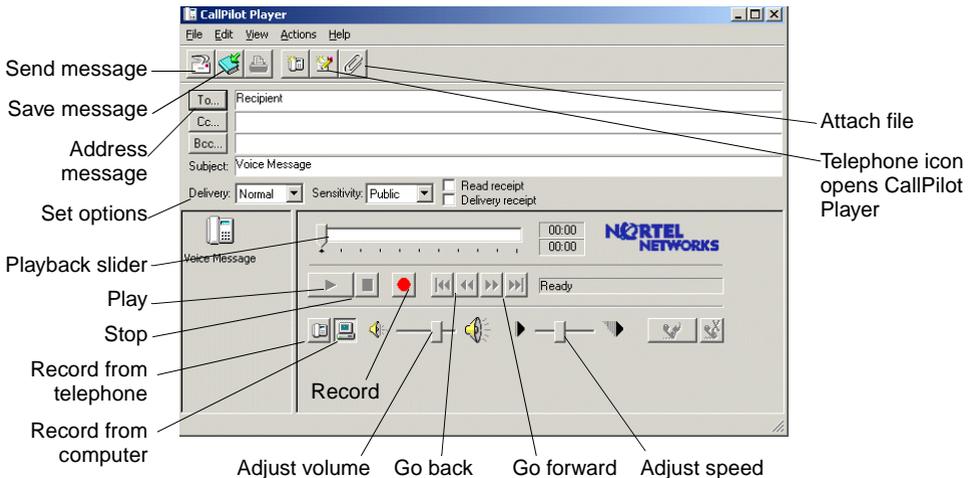
To save a newly created voice message as a file

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*, on page 36.

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 have mailbox capability to receive 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, click **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 Lotus Notes** under **Send using**, then click **Send.**
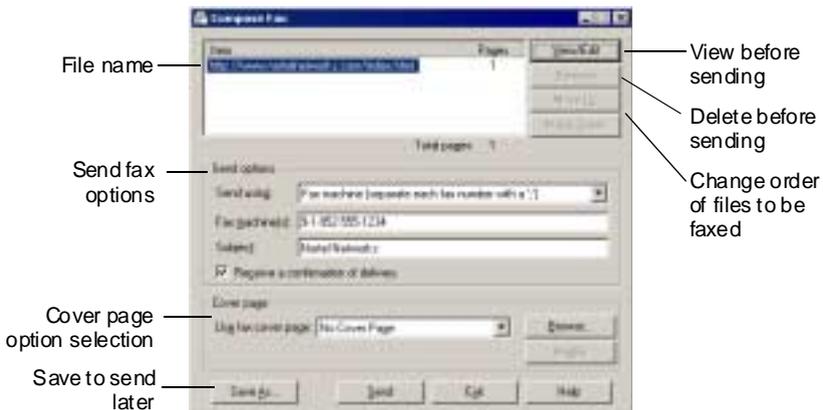
A new message form opens with your fax file attached. Address the message from the CallPilot, e-mail, or any Address Book. See *Addressing messages*, on page 30. Or type the formatted address in the **To...** field

6 Add attachments and options if required. See *Adding attachments to messages*, on page 29, and *Setting message options*, on page 29.
7 Click the **Send Message** icon.

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 will 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 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.
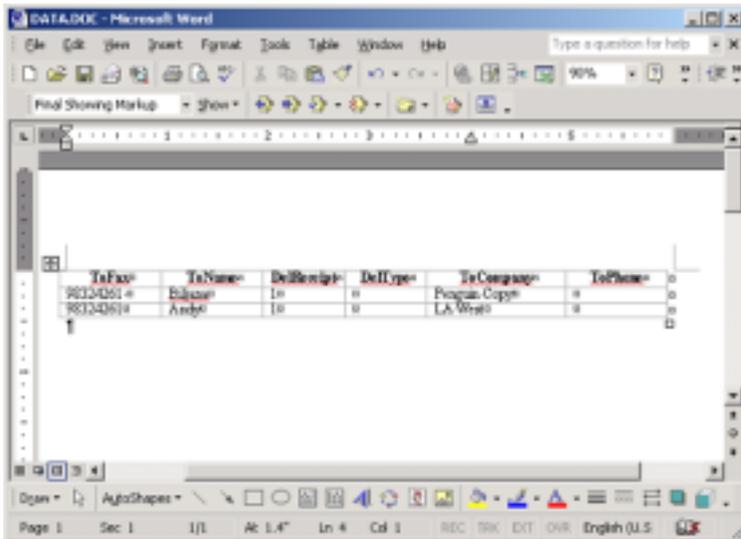
2   Add new columns or subtract existing ones, as required. For new columns, chose a meaningful column header name.

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.
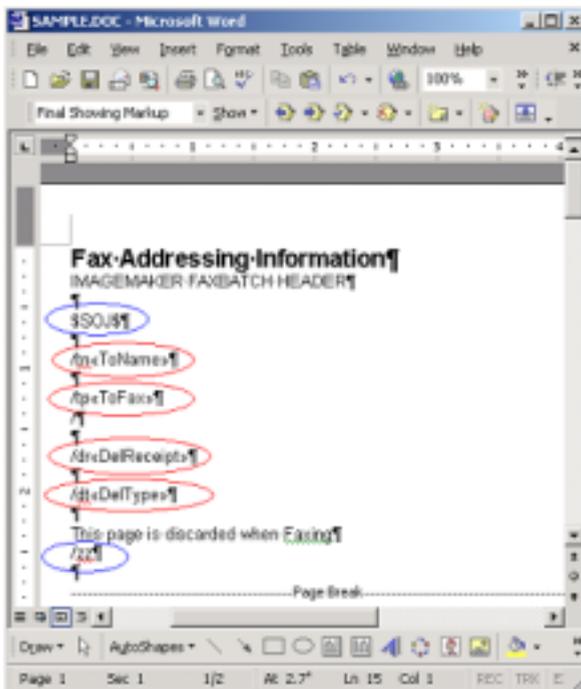
The purpose of this page is to provide a location to map information in the data source to each customized fax document. To signal CallPilot that this as a Fax Batch file and to prevent this page from becoming part of the fax, two special control codes **must** be present on the first page:

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:
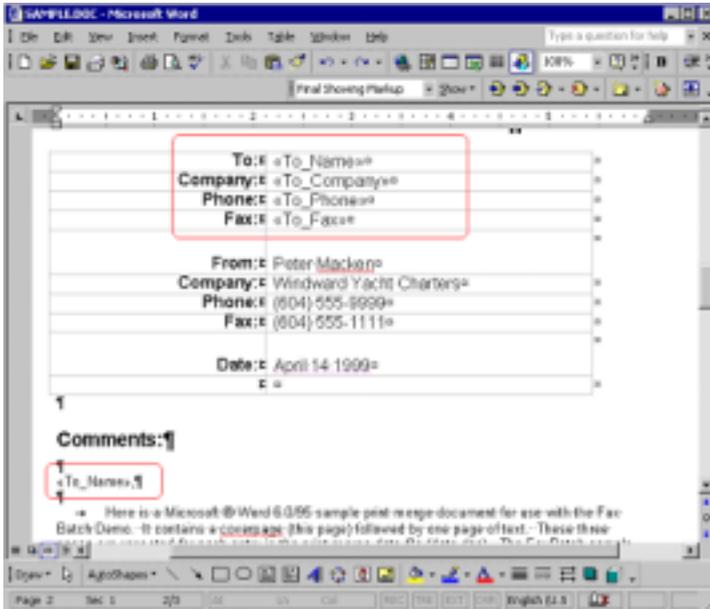
In this example, the document is customized for each recipient. Data source column headers are inserted into the document using the MS Word Mail Merge utility Insert function. After the main document has been customized, it is ready to be merged with the information in the Data.doc file. Consult your 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:
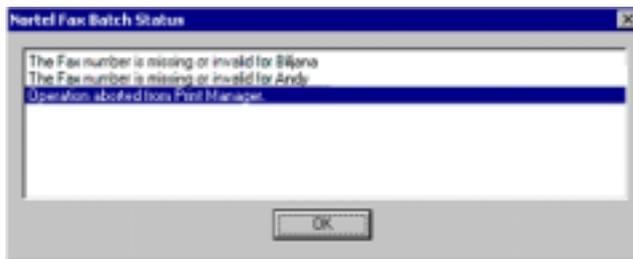

Problems such as a missing fax address or an unsupported fax address format are checked. However, problems such as a wrong fax number will not be identified, provided the number is in a valid format. A wrong fax number will however result in the sending of a non-Delivery receipt to the user's CallPilot 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:
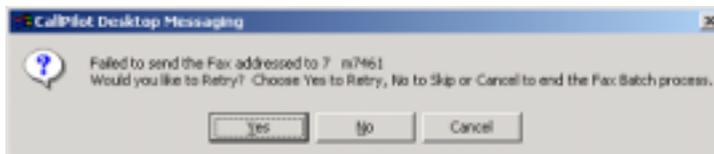
If you select Yes, an attempt is made to resend the fax to the server. If you select No, the current fax is skipped and processing begins on the next fax in the list. The fax that was skipped will not be sent. If you select Cancel, another dialog box appears asking you to confirm the cancellation. If 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 created with these tools will include the following general 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 sent.
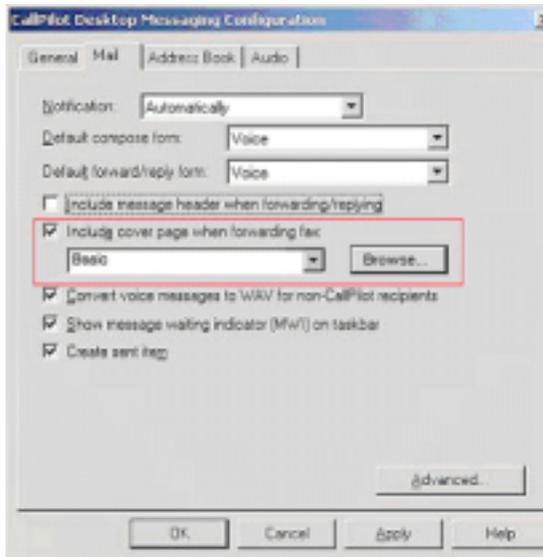

If you select this option, you can then choose and set a default cover page from a list of available cover pages. Use the "Browse…" button to choose the location where the cover pages are stored. The default location is: \\Program Files\Nortel Networks\ CallPilot\cvrpages.

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".
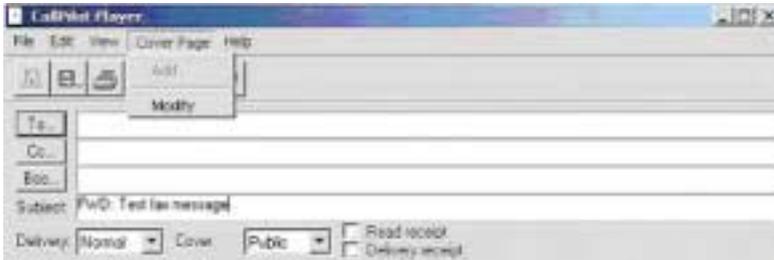

The "Add" menu displays a list of existing cover pages available to use. You can select one of these and click OK.
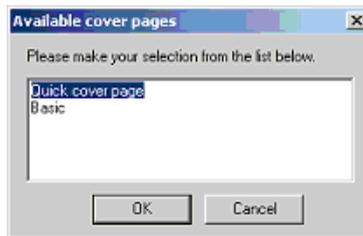
The "Modify" menu displays the current cover page content and lets you modify it. From the "Modify" window, you can also preview the current cover page.

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.
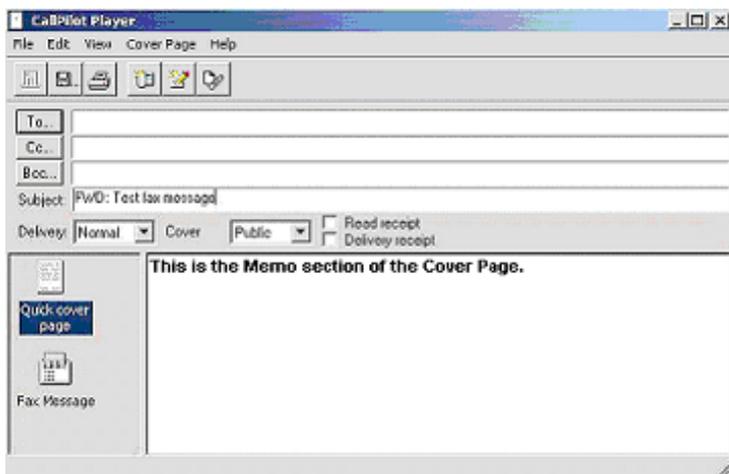
Nortel Fax Printer Driver form

You can use the Nortel Fax Printer form to send a fax message using either a CallPilot Desktop messaging client (such as Lotus Notes) 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 will be available from the CallPilot Custom form.
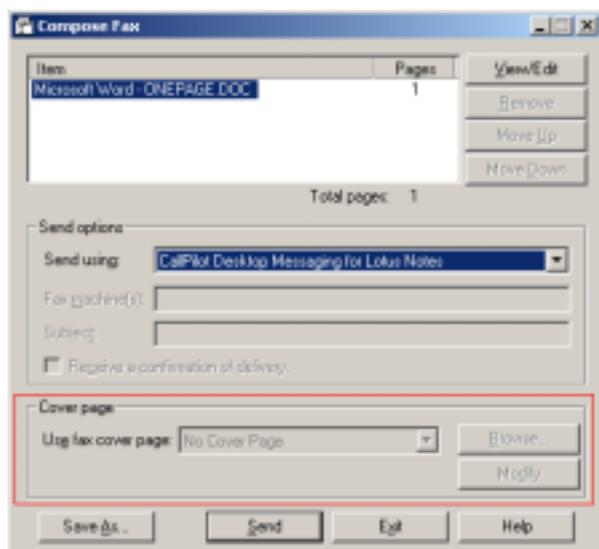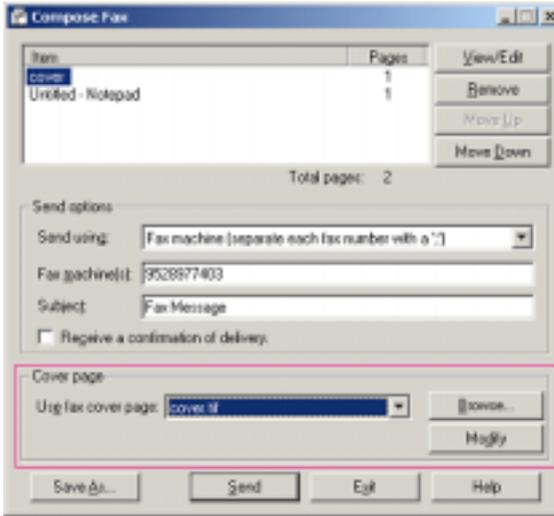
If you choose to send your fax to a specific destination (for example, a fax machine), the **Cover page** field becomes active and lets you browse for a cover page and/or select one from the dropdown list. You can then modify its contents. This provides functionality similar to the Custom form. (Refer 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 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.
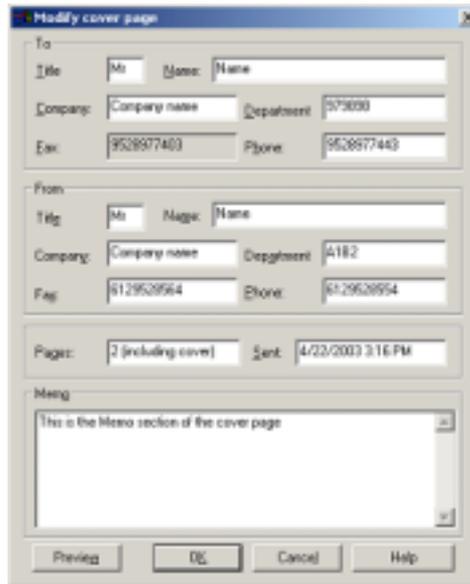
Click on Preview to view the current state of the cover page.

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 append an introduction to 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, Reply, or **Reply to All**.

   [icons]

2 On the new message form, compose a voice, fax, or text message.
3 Address forwarded messages the same way as a new message. Replies are addressed automatically.
4 Add attachments, set options, and change the subject line if required.
5 Click the **Send Message** icon.

Compose voice message
Compose text message
Attach file
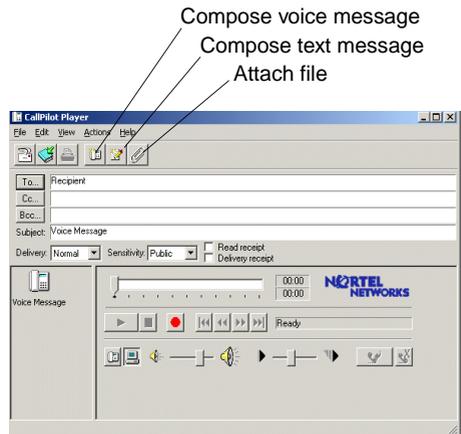
Note: Your administrator may block messages forwarded to external e-mail addresses.

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*, on page 36. 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**.

When you send a message marked Private, your recipient can 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

Callpilot users can access a variety of address books to address messages. These include the CallPilot or Lotus Notes Public Address Book (located on your CallPilot or Lotus Notes server respectively) or your Personal (local) Address Book. An address can be either internal or external to your organization.

To address a message using a Lotus Notes Address Book

A Lotus Notes Public Address Book contains number information fields named "Office phone" and "FAX phone", and CallPilot users can directly access these numbers. (Note that in a Lotus Notes Personal Address Book, these fields are called "Office phone" and "Office fax" respectively).

To address your message:

1   In a new CallPilot message, click **To…**
2   In the Address Book field, select the address book that you want to use. If the Lotus Notes Public Address Book is selected, an additional "Filter" drop-down list box is displayed. Using this control, you can specify what type of address to use.
   ‣ If "E-Mail Addresses" is selected, the address list will display all names.
   ‣ If "FAX Numbers" is selected, the address list will display names that have "FAX phone" information.
   ‣ If "VOICE Numbers" is selected, the address list will display names that have "Office phone" information.

   Note: You can address the same message to different types of recipients.
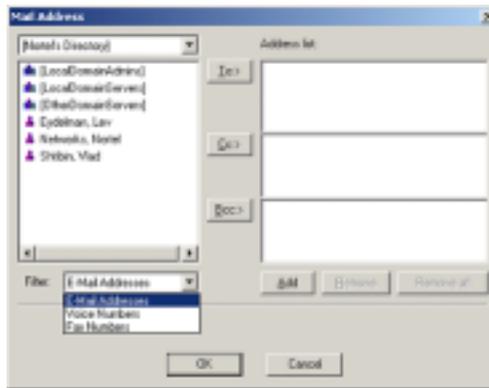
3   Select the recipient(s) from the list of names. Group names are in square brackets. You can select more than one address at a time. If you address a message using Voice or Fax numbers, you will be prompted to pick and verify the final destination.
4   Click **To ->**, **Cc ->**, or **Bcc ->**, as required.
5   Click **OK** to return to the new CallPilot message.

To address a message using a CallPilot 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.

Lotus Notes Desktop clients access the CallPilot Address Book through a dynamic lookup utility. This feature allows you to access the CallPilot Address Book without requiring you to maintain CallPilot address information in your Lotus Notes Personal Address Book. However, you can download CallPilot address information to your Personal Address Book if you want to address messages in offline mode. Such addresses cannot be validated in the offline mode.

To address your message:

1 Log on to a CallPilot server if you have not already done so.
2 Select the CallPilot Server Address Book from the list of available address books. When the CallPilot Address Book is selected, additional controls are made available to dynamically search for CallPilot addresses on the CallPilot server in a number of ways. For example:
    a. Select the search type "Last Name" in the "Search for:" combo box.
    b. Enter a set of letters into the text field.
    c. Click on "Search". All records with the last name matching the letters will be returned and displayed in the address list.
    Note: You can continue to change search types and/or modify letters until you find the desired name. If you enter a name that has not been downloaded, a dialog displaying the number of addresses to download may appear while the search proceeds.
3 Select the recipient(s) from the list of names. You can select more than one address at a time.
4 Click **To ->**, **Cc ->**, or **Bcc ->**, as required.
5 Click **OK** to return to the new CallPilot message.

To address a message manually

You can type an address directly into the **To** field of a new message without opening the "Mail Address" dialog. Type the address with no spaces, and enclose it in double quotes. The name will be resolved against all available address books and address types. If more than one address is found, you will be presented with a "CallPilot Recipient" dialog showing all the matching addresses. Choose which address to use for the message. You can modify Phone or Fax numbers here, but not CallPilot or E-mail addresses.

If you are a Lotus Notes user on a Terminal server, you cannot download CallPilot message addresses into your Personal Address Book. This address book is not availabe to Terminal server users when addressing Callpilot messages.

Required format for a CallPilot E-mail address

If you choose to enter a CallPilot addresses 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]

To download CallPilot addresses to your Personal Address Book

You can optionally download the names and addresses of CallPilot users to your Personal Address Book. This is useful if you are working in offline mode. In the online mode, Lotus Notes Desktop Clients can dynamically query and retrieve addresses from the CallPilot server address book at any time. See *Changing your address book settings*, on page 38.

Restrictions

When you submit a message to the CallPilot server for delivery to a telephone or fax number, the CallPilot server reviews the Restriction Permission Lists (RPL) to validate that the sender has the necessary permissions. The same rules that determine if a number can be dialled from your telephone will be applied to the destination number of the outgoing voice or fax message.

If you lack the necessary permissions (for example, cannot utilize voice channels, cannot place long distance calls, etc.), a Non-Delivery Notification (NDN) will be generated. An NDN will also be generated for the recipient if the destination number is deemed invalid.

CallPilot distribution lists

You can create a Personal Distribution List (PDL) over the phone or in My CallPilot. Using the Lotus Notes client, you can also create a Group in the local or public Lotus Notes address books. However, Lotus Notes address books are not accessible from the telephone or from My CallPilot.

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 Lotus Notes, select these lists from the CallPilot Address Book.

To create a CallPilot group

You can create a personal distribution list for a group of recipients to whom you frequently send messages. After you create a list, it appears in your Personal Address Book in Groups (CallPilot).

You create a CallPilot group in the same way that you create an e-mail group. The CallPilot group can contain CallPilot and e-mail addresses.

1 In your Lotus Notes Inbox, click the **Address Book** icon.
2 Select **Groups (CallPilot)**, then click the **Add Group** button.
3 Enter a **Group Name** and **Description**, then click the arrow beside **Members**.
4 In your Personal Address Book, place a check mark beside each name that you want to add to the group. Click **OK** to exit the list.
5 Click the **Save** button.
6 Click the **Close** button.

You can edit or delete the list in Groups (CallPilot).

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 Lotus Notes Inbox, on the Actions menu, click **CallPilot Desktop Messaging** > **CallPilot Configuration**.
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**.
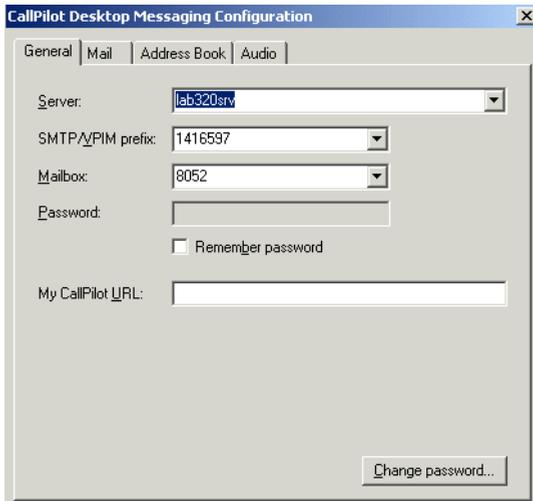
To change your CallPilot password

This is the same password that you use on 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 Lotus Notes Inbox, on the Actions menu, click **CallPilot Desktop Messaging** > **CallPilot Configuration**.

2 Click the **Mail** tab to display the current mail settings.
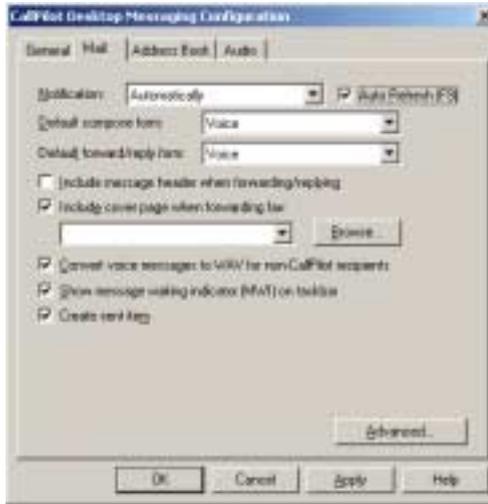
3 The following settings are available:

- 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.)

- Lotus Notes Auto Refresh is enabled by default. When enabled, all CallPilot Desktop messaging views (All, Inbox, Drafts and Sent) will automatically update when new CallPilot messages arrive. The effect is similar to using Lotus Notes "View\Refresh" menu or hitting F9 key. The refresh will only take place when viewing a CallPilot view and will not affect Lotus Notes views. There is no need to refresh when viewing a Lotus Notes view. CallPilot views will be refreshed by the Lotus Notes client when you open one of the CallPilot views. However, if you have a large number (thousands) of e-mail or CallPilot messages, the Lotus Notes Auto Refresh may impact the network performance when a new CallPilot message arrives. Therefore, users have the option to disable the Refresh to prevent network problems by deselecting this checkbox. Note that when this option is disabled, you will have to refresh CallPilot views manually by using Lotus Notes "View\Refresh" menu, hitting F9 key, or changing the current view.

- Include a message header when forwarding/replying - The header information of the original message appears in a reply or forwarded message.
- Include a cover page when forwarding a fax - Refer to the "CallPilot Configuration" section on page 23 for information regarding adding and/or modifying cover pages.
- Convert voice messages to WAV for non-CallPilot users - 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 a sent item - A copy of each sent message is stored in the Sent folder.

4 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 Lotus Notes Inbox, on the Actions menu, click **CallPilot Desktop Messaging** > **CallPilot Configuration**.

2   Click the **Address Book** tab to display the current Address Book settings.

3   Make any changes required, then click **OK**, or proceed to download your address book as described below.
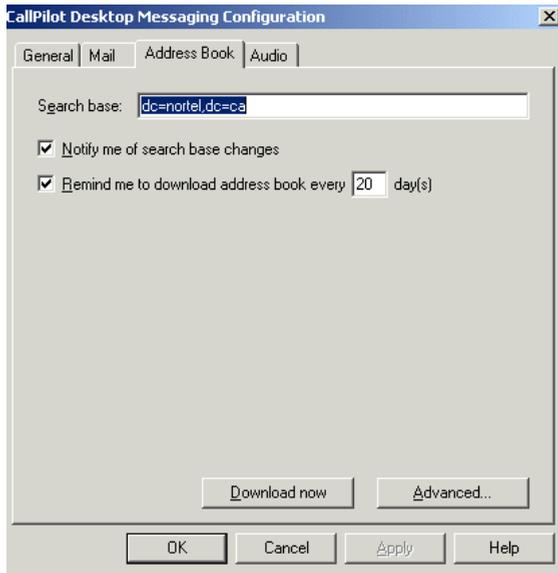
To download the Address Book to your computer

You can download the names and addresses of CallPilot users to your Personal Address Book.

1   In your Inbox, on the Actions menu, click **CallPilot Desktop Messaging** > **CallPilot Configuration**.

2   Click the **Address** Book tab.

3   Check the **Remind me...** box and specify the number of days between reminders.

4   Click **Download Now**.

5   Click **OK**.

Changing audio settings

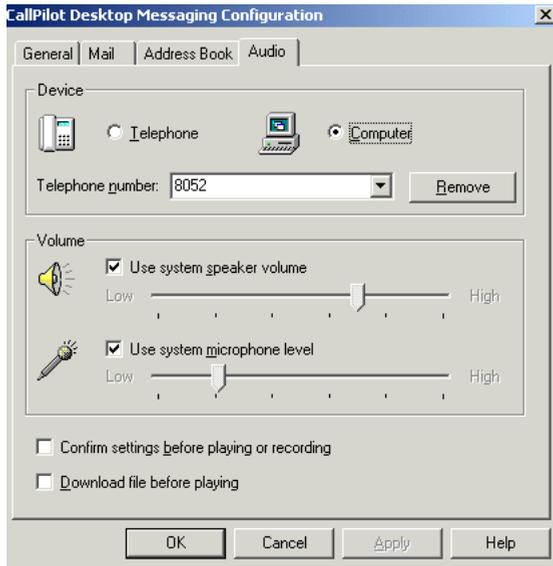## To change the audio device and volume

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

1 In your Lotus Notes Inbox, on the Actions menu, click **CallPilot Desktop Messaging** > **CallPilot Configuration**.
Or
On the CallPilot Player, select **View** > **Options**.

2 Click the **Audio** tab to display the current Audio settings.

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

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*, on page 35. For more information on My CallPilot, refer to the *My CallPilot User Guide*.

1 In your Lotus Notes Inbox, on the Actions menu, click **CallPilot Desktop Messaging** > **CallPilot Desktop Messaging Tools** > **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.
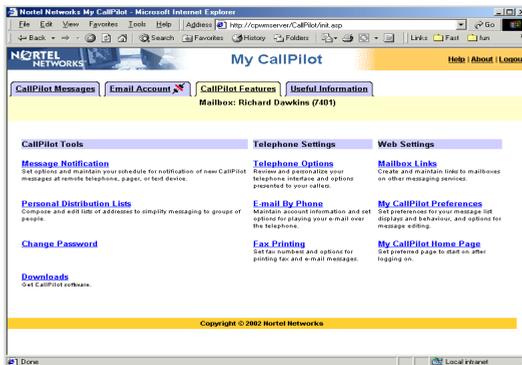
To view user information

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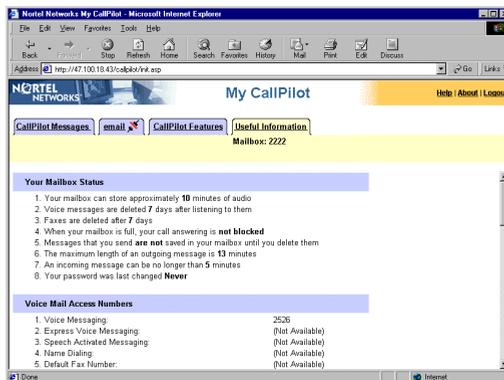
Working offline

To work offline, you will require 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 in your Inbox, 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*, on page 38.

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 stores your recorded messages and sends them the next time you log in to the CallPilot server.

CallPilot Desktop Messaging User Guide
for Lotus Notes

This user guide is distributed in soft copy only.

NØRTEL
    NETWORKS™