NØRTEL NETWORKS™

CallPilot.™
Release 2.0

My CallPilot
User Guide

Contents

Welcome to **My CallPilot**

My CallPilot from Nortel Networks is a web-based business communications system that offers exceptional flexibility for managing your messaging needs.

You can work with My CallPilot from any computer that has Internet access and a web browser configured for My CallPilot. Here are some of the many ways you can use My CallPilot:

- View useful information about your mailbox.
- Receive, forward, reply to, and send voice messages, faxes, and e-mails.
- Change the setup of your mailbox features.
- Change your CallPilot password.
- Create personal distribution lists.
- Set up remote notification to a telephone or pager.
- Set up text message notification for a wireless e-mail device. See Appendix A for details.

Some features mentioned in this guide are options. For details, refer to the *Feature availability* topic in the CallPilot Player online Help, or ask your administrator.

Getting started

About this guide

This user guide describes how to use the web-based resources of My CallPilot. The instructions and screen images shown in this guide provide general information for using My CallPilot. Specific details may vary depending on your computer's operating system, and the features available for your CallPilot mailbox.

For further assistance, refer to the My CallPilot online Help.

What you need

You can access My CallPilot from any computer with Internet access and a web-browser configured for My CallPilot. Before you start to use My CallPilot, ensure that the computer you are using is set up according to the following requirements:

- Internet Explorer 5.x and 6.x, or Netscape 6.2x and above
- Windows 95 B, Windows 98 SE, Windows 2000 Professional, Windows XP, Windows NT4 SP6a
- Microsoft Imaging for Windows or other imaging software to view faxes (included with most versions of Windows, except new installations of Windows XP)
- Nortel Fax Driver and CallPilot Desktop Messaging to create faxes
- CallPilot 2.0 Player to play and record voice messages. An embedded version of the CallPilot Player (shown in this guide) may appear in your Inbox and voice messages. (For required settings, see *Setting messaging preferences*, page 24.) Some systems may not display the embedded player. If not, you will be prompted to download the CallPilot Player. If you are only playing messages, not recording, you can use the Microsoft Windows Media Player, or another WAV-compatible media player. These players will not function exactly the same as the CallPilot Player described in this guide.
- Monitor with 256-color 800 x 600 capability
- 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) connection to the CallPilot server
- ISDN, ADSL, or dial-up modem connection for accessing CallPilot messages

To download audio players

You need and audio player to play and record voice messages. The first time you log in to My CallPilot, it checks to see that an audio player is installed. If one is not installed, you will be prompted to download the CallPilot Player. Follow the instructions to start the download and installation process. If you need to re-install a player at a later time:

1 Click Downloads on the CallPilot Features main page.
2 Select the CallPilot Player or other audio player from the list.

Logging in

Your administrator provides you with the URL for My CallPilot. Bookmark this address in your web browser for easy access.

To log in to My CallPilot

1 In your web browser, navigate to the My CallPilot address.
2 On the Welcome page, in Mailbox, type your mailbox number. This is usually your office telephone extension number.
3 In Password, type your CallPilot password.
4 Click Login.
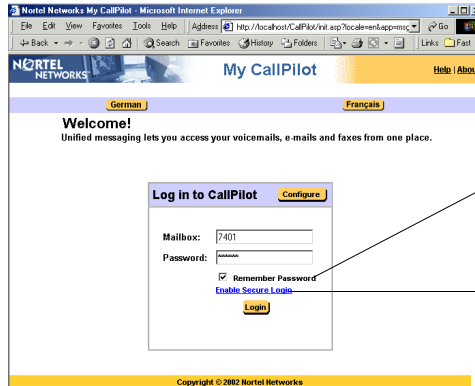
Do not check the Remember Password box on a shared computer.

The Login Securely link appears if SSL encryption is enabled.

To change to another server

If you have a mailbox on another CallPilot server, you can log in to that server from My CallPilot during login. Click Configure, type the server details in the Change to box, then click OK. When you log in again from the same computer, CallPilot accesses the new server. To change back to your default server, click Configure, then click Restore Default.

To change to another language

If language buttons are available on your My CallPilot login page, you can click one to change from your default language to another language.

To log in using secure login

If the Enable Secure Login link is available on your login page, click it to enable SSL encryption. The Login Securely button appears. Bookmark the link for future logins.

To log in remotely

You can log in to My CallPilot from any computer that has Internet access and supported browser configuration. You can use the pre-installed audio player for voice messages, or you can download the CallPilot Player for full feature capability.

To log out

To log out from My CallPilot, click Logout on any My CallPilot page.

CallPilot Messages tab

To access your CallPilot messages, click the CallPilot Messages tab. You can play voice messages and view faxes, delete, forward, and reply to messages, and compose new messages.

Your Message List

Messages tab

Urgent
Private
Attachments:
Voice
Fax
Text

Use the embedded CallPilot Player, if available, to play and record voice messages

To check for new messages

To see new messages, click Refresh. New messages appear in Bold.

To open a message

To open a CallPilot message, click the voice, fax, or text icon in the Attachments column beside the message, or click any underlined part of the message line. See *Playing voice messages*, page 7, and *Viewing fax messages*, page 8.

To select a message

To select a CallPilot message, check the box at the far left of the message line. When a message is selected, you can delete, forward, or reply to it.

To delete a message

To delete a CallPilot message, select it and click Delete or Delete Now. If you click Delete, the message is permanently deleted when you log out. If you click Delete Now, all selected messages are permanently deleted immediately.

To select your telephone or computer to play and record voice messages

You can choose to play and record voice messages through your telephone or your computer. Click the Telephone or Computer icon in the embedded or downloaded CallPilot Player. (To record and play messages using the telephone, you must have a properly configured firewall, or no firewall between you and the web server.)

See *Setting messaging preferences*, page 24, to change the audio setting and the number that CallPilot dials for playing and recording messages.

Playing voice messages

Before playing voice messages, see *To select your telephone or computer to play and record voice messages*, page 6.

To play a voice message the quick way

Use the embedded CallPilot Player, if available, to play your voice messages quickly. (The player appears in your Message List if the Attachments column appears, and if you select VBK as your audio setting. See *Setting messaging preferences*, page 24.)

1 In your Message List, click the Voice (Play) icon in the Attachments column.
2 If you selected Computer for playback, the audio player plays your message from your computer's speakers.
   If you selected Telephone for playback, your telephone rings and plays the message when you answer.
3 Use the player buttons to stop, re-play, or call the sender.
4 Click Disconnect, or hang up the telephone.

Embedded CallPilot Player

Controls on other audio players vary

Play/Re-play   Stop   Disconnect   Call Sender

Play messages from computer or telephone

To play a voice message in a mixed voice, fax, or text message

In a mixed voice, fax, or text message, open the message to select each part.

1 In your Message List, click any underlined part of the message to open it.
2 In the open message, click the Voice icon. The audio player opens.
3 If you selected Computer for playback, the audio player plays your message from your computer's speakers.
   If you selected Telephone for playback, your telephone rings and plays the message when you answer.
4 Use the player buttons to stop, re-play, or call the sender.
5 Click Disconnect, or hang up the telephone. Click Message List to return to your messages.

Return to messages

Reply to, forward, or delete this message

Viewing fax messages
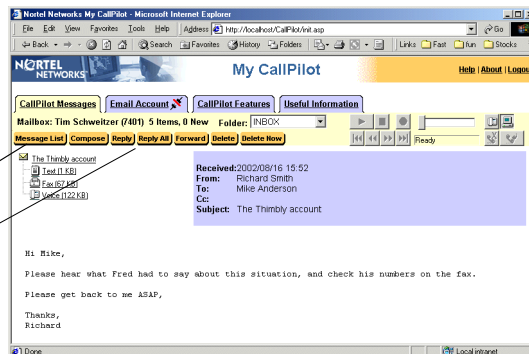
To view faxes on your computer, you must have Imaging for Windows or other imaging software installed on your computer. In addition, your CallPilot administrator must enable fax capability for your mailbox.

To view a fax message

1 In your Message List, click the fax icon beside the message, or click any underlined part of the message that you want to view.

2 The image may display right away, or if the Open/Save dialog appears, select Open to display the image.

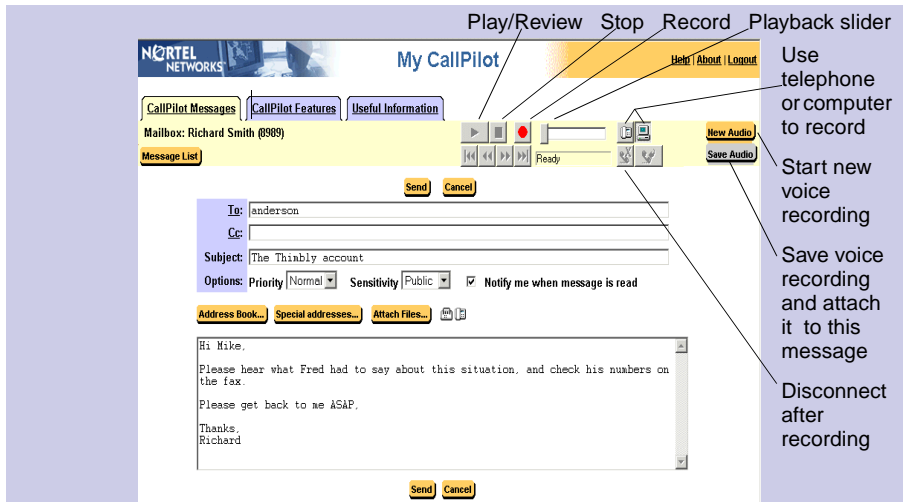3 When you have finished, close the fax image to return to your messages.
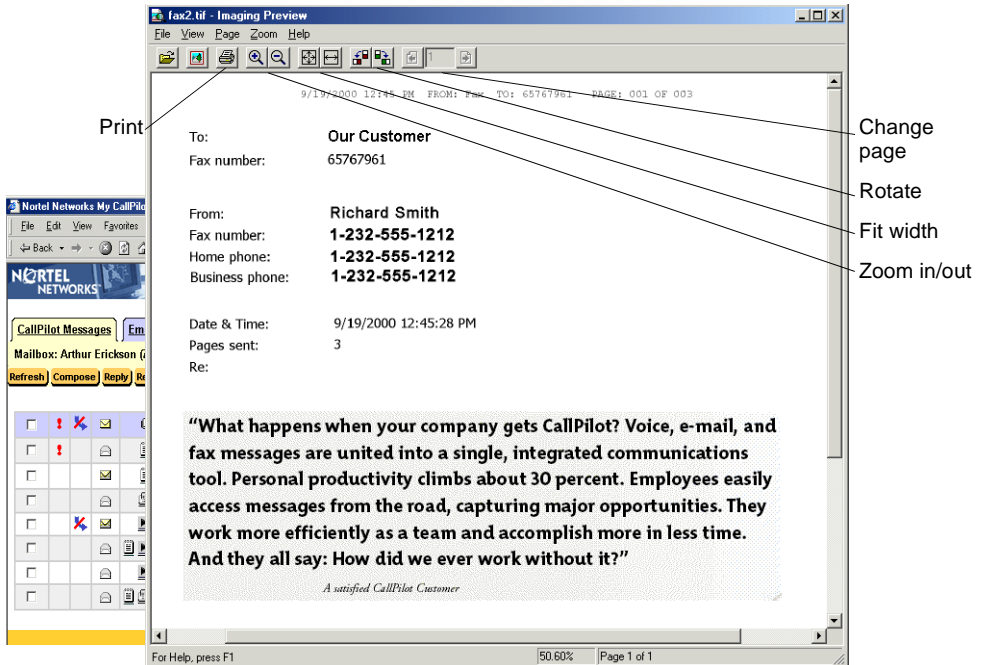
Note: If you are using imaging software other than Microsoft Imaging for Windows as your default viewer, the appearance of the fax message may differ from this one, and you may not be able to use some of the controls shown here, such as Zoom in and Zoom out.

Composing voice messages

You can compose a message that is any combination of voice, fax, or text. To record voice messages, use the embedded or the downloaded CallPilot Player.

To record and send a new voice message

1   In your Message List, click Compose. A new message page opens.

2   In the embedded or downloaded Player, select the telephone or computer icon.

3   Click the red Record button.

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. Click Save Audio.
    ‣ 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. Click Save Audio. Hang up.

5   Click To… (or Address Book) to address from the CallPilot Address Book, or click Special Addresses. See *Addressing messages*, page 15.

6   Add attachments and options if required. See *Adding attachments to messages*, page 13, and *Setting message options*, page 14.

7   Click Send.

Play/Review   Stop   Record   Playback slider

Use telephone or computer to record

Start new voice recording

Save voice recording and attach it to this message

Disconnect after recording

NORTEL NETWORKS   My CallPilot   Help | About | Logout

CallPilot Messages   CallPilot Features   Useful Information

Mailbox: Richard Smith (8989)

Message List

Ready

New Audio

Save Audio

Send   Cancel

To: anderson
Cc:
Subject: The Thimbly account
Options: Priority Normal ▼   Sensitivity Public ▼   ☑ Notify me when message is read

Address Book...   Special addresses...   Attach Files...

Hi Mike,

Please hear what Fred had to say about this situation, and check his numbers on the fax.

Please get back to me ASAP.

Thanks,
Richard

Send   Cancel

To save a newly created voice message as a file
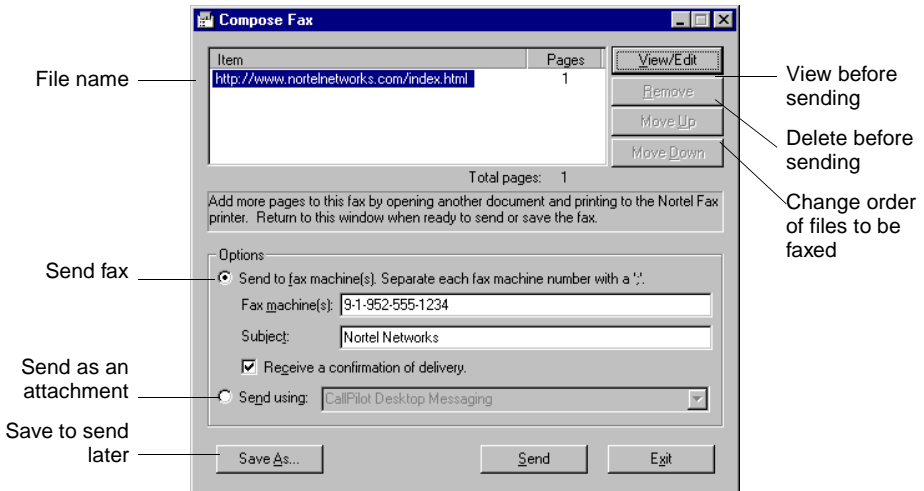
1   Open the CallPilot Player (not the embedded Player), record a new message, and on the File menu, click Save Audio.

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; My CallPilot automatically converts .vbk files to .wav files when sending to non-CallPilot users.

Composing fax and text messages

Your CallPilot recipients must have fax capability to view your 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.

To create and save a fax file

To create a fax file, your CallPilot mailbox must have fax capability, and your computer must have Desktop Messaging installed. After you save the fax file, you can add it to a message as an attachment.

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   In the Compose Fax dialog box, click Save As.
5   Type a name for the file, and browse to select a folder to save it in. Save the file as a .tif file. Click Save.
6   Click Exit to close Compose Fax.

File name — http://www.nortelnetworks.com/index.html

View before sending

Delete before sending

Change order of files to be faxed

Send fax — Send to fax machine(s). Separate each fax machine number with a ';'.

Fax machine(s): 9-1-952-555-1234

Subject: Nortel Networks

Receive a confirmation of delivery.

Send as an attachment — Send using: CallPilot Desktop Messaging

Save to send later — Save As...

Total pages: 1

Add more pages to this fax by opening another document and printing to the Nortel Fax printer. Return to this window when ready to send or save the fax.

To compose and send a fax or text message

1   In your Message List, click Compose. A new message page opens.
2   Click To… (or Address Book) to address from the CallPilot Address Book, or click Special Addresses. See *Addressing messages*, page 15.
3   Add a fax file as an attachment. See *Adding attachments to messages*, page 13.
4   Add options if required. See *Setting message options*, page 14.
5   Enter text if required.
6   Click Send.

Calling the sender of a message

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

1 In an open message, click Call Sender.

2 Answer the telephone when it rings. CallPilot immediately calls the sender of the message.

3 When you have finished the call, hang up the telephone or click Disconnect.

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, Reply, or Reply to All.

[Reply] [Reply All] [Forward]

2 On the new message page, 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 Send.

Type text message   Attach file

Adding attachments to messages
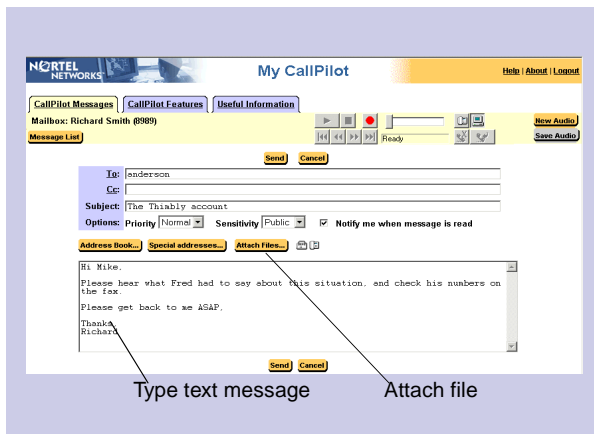
Before sending a message, you can attach a voice, fax, or text file to it. Voice files can be .vbk or .wav format for CallPilot recipients, My CallPilot automatically converts .vbk files to .wav files when sending to non-CallPilot users. Fax files must be .tif format. Text files must be .txt format.

To attach a file to a message

1 On a new message page, click Attach Files... .
2 In Add Attachments, browse for and select the file that you want to attach.
3 Click Open.
4 Click Attach selected file.
5 Click OK. The icon for the attached file appears beside the Attach Files button on the new message.
6 Continue to compose, address, and send the message as usual.

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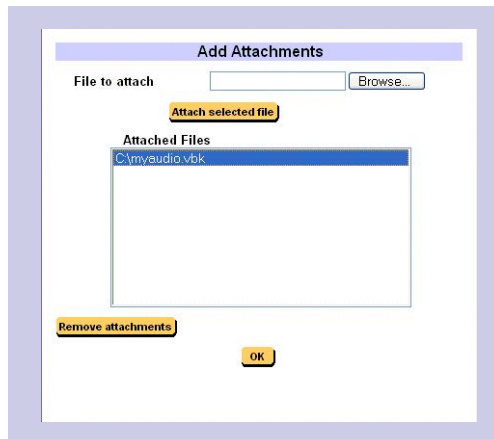
Before sending a message, you can set options for handling and delivery.

To set message options

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

Options: Priority Normal ▼   Sensitivity Public ▼   ☐ Notify me when message is read

▸ For Priority, select Urgent, or leave the setting as Normal.

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

You cannot forward messages that are marked Private to other CallPilot users. However, be aware that messages you send marked Private can be forwarded by non-CallPilot users. Also, recipients in non-CallPilot systems may not be informed of Private settings. In your message, tell the recipient that the message is Private.

▸ For Notify me..., check the box to request acknowledgment that your recipient received the message.

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

Addressing messages

You can address a CallPilot message in two ways:

- You can select a name from the CallPilot Address Book that is maintained by your organization on the server. It contains the addresses of the CallPilot users and shared distribution lists that you can use. You cannot edit this list.
- You can manually enter or select addresses on other servers in Special Addresses.

To address a message from the Address Book

1   In a new CallPilot message, click To: (or Address Book).
2   In Enter last name, type the recipient's name, then click Find.
3   In the list of names, select the name of the recipient or distribution list.
4   Click To. You can select one or more addresses, clicking To after each one.
5   Click OK to return to the new CallPilot message.

To address in Special Addresses

1   On a new message page, click Special Addresses.
2   Select an address format from the drop-down list (for example Network mailbox).
3   Type the number and any other information required. Refer to the online Help for the correct addressing formats.
4   Click To.

CallPilot Features tab

Click the CallPilot Features tab to change the settings for your CallPilot features and telephone options, and to set preferences for web-based access.

The main CallPilot Features page displays only the features that are available for you to use. Click any title to open its settings page.

Setting up message notification
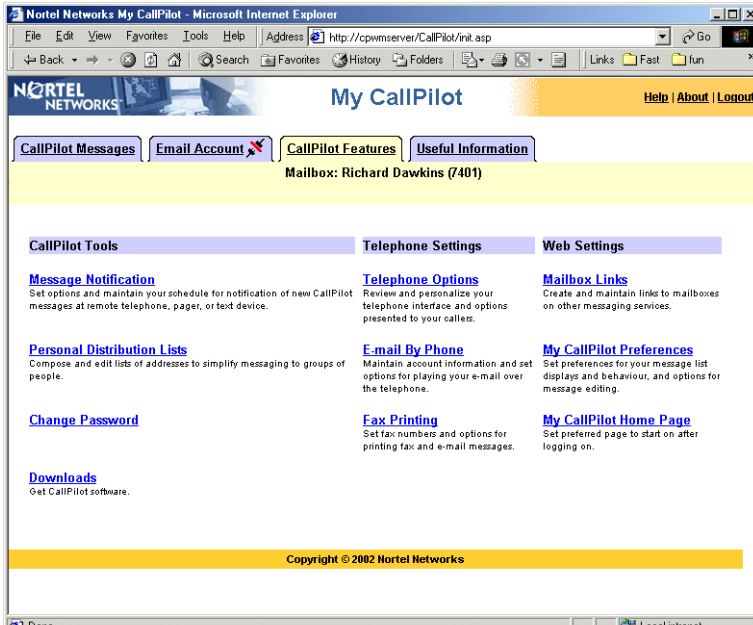
CallPilot can notify you of new messages when you are away from the office. Your administrator defines whether these devices and services are available to you:

- Remote text notification to a wireless e-mail device. See *Appendix A: Remote Text Notification*, page 29.
- Remote Notification to a telephone or pager. This type of remote notification can be set up and turned on or off from your telephone as well. You can set up two time periods for notification, and choose whether you want to be notified of all messages or urgent messages only.

You can have the two types of notification turned on simultaneously.

Message Notification

You can receive notification of new CallPilot Messages at an email device, or a remote telephone or pager that you define. You can also specify which type of messages you wish to be called for, and define a calling schedule.

Remote Text Notification

(This feature has not been enabled for your mailbox class.)

Remote Notification to telephone or pager

Current Status: ● On ○ Off

Notification Device: [Telephone Settings ▼]

Notification Number:	14135551212	CallPilot will call this number to deliver notification for selected messages. The information included in the notification call depends on the selections below.
Default Callback Number:	1234567890	Your 10 digit pager access number. This number is used by some pager services.
Identification Number:	1234	Your Pager Identification Number (PIN). This number is used by some pager services.

Notify for:
- ● All messages
- ○ Urgent messages

Calling Schedule:
- ○ Any time
- ● According to this schedule:

You control notification by turning it on and off as needed. When notification is on, you will be notified of selected messages that arrive during periods you define.

Days:	☑ Monday	☑ Friday
	☑ Tuesday	☐ Saturday
	☑ Wednesday	☐ Sunday
	☑ Thursday	

Time period during active day(s):   Time zone: (GMT -06:00) Central Time

First time period: ☐ Optional second time period:

From [09 ▼] : [00 ▼]   From [17 ▼] : [00 ▼]

To [17 ▼] : [00 ▼]   To [09 ▼] : [00 ▼]

Notification periods can cross midnight starting on your selected days. If the end time is earlier than the start time, it is assumed to be on the next day. For the entire day, use 00:00 to 00:00.

[Save]   [Cancel]

Managing personal distribution lists

A distribution list saves you time when you send messages to the same group of addresses. You can create up to 99 personal distribution lists, and enter a number and name to identify each list. Each personal distribution list can contain up to 200 entries.

A personal distribution list can contain all of the same types of addresses to which you can send a composed message, except other personal distribution lists. An entry can be a mailbox number, shared distribution list number, network mailbox, open network mailbox, or telephone number.

You can create personal distribution lists in My CallPilot or on your telephone. These lists are stored for you in the Local Address Book on the CallPilot server. You can access these lists from My CallPilot, Desktop Messaging, and your telephone.

To edit, delete, or create personal distribution lists

To edit or delete an existing list, select the list and click Edit or Delete. Make the changes, then click Save.

To create a personal distribution list, click Add New List. Type a number and name for the list. Add entries by selecting an address format from the drop-down list, then enter the information required. Refer to the online Help for the correct addressing formats, if required. Click Save.

Changing your CallPilot password

This is the same password that you use to log in to CallPilot from the telephone. CallPilot requires that you change your password on a regular schedule set by your administrator.

CallPilot prevents you from using some passwords if they are too short or too simple, or if you have used the same one recently. Keep your mailbox secure by choosing passwords that are not easily discovered.

To change your password, type your old password, type your new password twice, then click Save.

Changing your telephone options

To assign a custom operator number for callers

You can offer your callers the option of leaving a message or speaking to one of your assistants or colleagues. In your greeting, tell callers to press zero if they wish to speak to this person in your absence. The custom operator number is the number your callers reach when they press zero. Enter the number in Telephone Options.

To set times and options for blocking messages from callers

You can temporarily prevent your callers from leaving messages in your mailbox. You can choose to transfer callers to your custom operator, or disconnect them. As a courtesy to your callers while message blocking is turned on, you should record a temporary greeting that provides details of your absence and tells callers what to do. Select the settings in Telephone Options.

To turn Autologin on or off and define allowed numbers

When Autologin is turned on, you don't have to enter your mailbox and password when you log in from a defined number. Your administrator defines secure numbers for Autologin, such as your office or home telephone. When Autologin is turned on, you access your mailbox by dialing the CallPilot access number or pressing the message key at one of your defined Autologin numbers. To turn on Autologin, check the box in Telephone Options.

Save   Cancel

Telephone Options

For Callers

Custom Operator Number: 7000   This is the number of the person your callers reach when they press 0.

Block callers from leaving messages: Only when temporary greeting is recorded ▼

Blocked callers will be played the greeting, then
- ● Transferred to custom operator
- ○ Disconnected

When logging in

☑ Turn on Auto Login for allowed numbers   Auto Login allows you to bypass mailbox and password entry when logging in from secure telephones

Number	Auto Login Allowed
7240	

Message waiting indicator at telephone: ● 7240

Save   Cancel

Setting up telephone access to e-mail

T o set up access to your e-mail accounts from CallPilot, see *Setting up links to your e-mail accounts*, page 23. You can specify one of these e-mail accounts for telephone access so that you can check for new e-mail messages while logged in to CallPilot from your telephone. You can have the text content of any new e-mail messages read to you over the telephone.

To set up an e-mail account for telephone access

1 Open the E-mail By Phone page. Your e-mail account links are displayed.

‣ To set up or edit a mailbox link, click Configure New Mailbox Link.
   See *To set up an e-mail link*, page 23.

2 Select one e-mail account for access by telephone.

3 Select a female or male voice to read your e-mails.

4 Click OK.

E-mail By Phone

CallPilot allows you to listen to e-mail messages in one of your linked e-mail account folders when you log in using the telephone.
When you are logged in using the telephone, switch to your e-mail message list by pressing 8-9.

Mailbox link selection and voice configuration

Use voice of: Male - Tom ▼

Select mailbox link for E-mail by Phone: Configure New Mailbox Link

Enable	Enabled for My CallPilot	Mailbox Server	Folder	User Name	Edit	Delete
⦿	✓	Exchange	INBOX	timster	🖊	🗑

OK

Edit Mailbox Link Configuration

Mailbox link configuration

Mailbox server:	Exchange ▼
E-mail By Phone Folder (e.g. INBOX):	INBOX
E-mail address:	aerickson@widget.com
Mailbox user name:	arterickson
Mailbox password:	••••••••••

Changing fax printing options

If your CallPilot mailbox has fax messaging capability, you can receive a fax message in your mailbox and print the fax at a selected fax number. Set options for default fax number, Autoprinting, and print cover page on the Fax Printing page.

To change the default printer

You must set a default fax number if you turn Autoprinting on. Even if you are not using Autoprinting, a default fax number is the simplest way to print. The default number can be any fax number that CallPilot can dial, including any normally required prefixes.

To turn Autoprinting on or off

When Autoprinting is turned on, any faxes that arrive at your mailbox are automatically printed at a specified default fax number. A message that has been autoprinted remains in your mailbox so that you can reprint it or forward it. Your printed faxes may be automatically deleted from your mailbox on a schedule set by your administrator.

Autoprinting is the most convenient way to handle fax messages while you are in one location. If you are away from your office, you can turn Autoprinting off and print your faxes at another fax number.

To turn fax separator page printing on or off

You can select whether to print a fax separator page when you print a fax message. A separator page identifies you and gives details of the print job, such as the number of pages. Separator pages are useful if you receive faxes without cover pages. If the sender of the fax includes a header page with the fax, the header page also prints.

Setting up links to your e-mail accounts

You can set up links in CallPilot so that you can check your e-mail for new messages. You may also be able to forward and reply to messages, and send new e-mails.

You can define up to five e-mail accounts. One of these accounts can be set up for access from your telephone. See *Setting up telephone access to e-mail*, page 21. The selected account shows a check mark under Enabled for E-Mail By Phone.

To set up an e-mail link

1. On the Mailbox Links page, click Configure New Mailbox Link.
2. Select your e-mail server from the drop-down list. To get this name, look in the account settings of your e-mail application, or ask your administrator.
3. Type a name for this account to display on the tab.
4. Type the name of the folder to access for your e-mail messages, such as Inbox.
5. Type your e-mail address.
6. Type your mailbox user name (the User ID of your e-mail account).
7. Type the password for this e-mail account.
8. Click OK. The password is encrypted for security.

You can edit this information at any time, or delete the account.

Remember that whenever you change your e-mail password, you need to change it in My CallPilot as well.

Mailbox Links

CallPilot allows linked mailbox folders to be viewed in one place when logging in to My CallPilot. One of these e-mail account folders may also be accessed through the telephone in the E-mail By Phone feature.

Select mailbox links to display: **Configure New Mailbox Link**

Display	Enabled for E-mail By Phone	Name to Display	Mailbox Server	Folder	User Name	Edit	Delete
☑	✓	TBender	Todd's Exchange Server	InBox	TBender	🖉	🗑

OK

Save **Cancel**

Edit Mailbox Link Configuration

Mailbox link configuration

Mailbox server:	Exchange
Name to Display (on Tab):	Email Account
Mailbox Folder (e.g. INBOX):	INBOX
E-mail address:	tim@bigcompany.com
Mailbox user name:	timster
Mailbox password:	********

Setting messaging preferences

To change Message List columns

You can change the columns in your Message List. "Attachments" must be in the Displayed Columns list to see the embedded Player in your Message List.

To add a signature

Type or paste your signature and other information, then click the check box if you want this signature added automatically to outgoing text messages.

To change environment settings

Change any of these My CallPilot settings to your preferences.

Select CallPilot (VBK) if you want to use the embedded CallPilot Player (allows Call Sender and Disconnect).

This is usually your own extension. Keep the telephone within easy reach of your computer.

Choosing a home page for My CallPilot

Choose the page that you want to automatically display when you log in to My CallPilot.

Save   Cancel

My CallPilot Home Page
Choose your default home page.

Available CallPilot pages:

○ CallPilot Mailbox
○ CallPilot Features
◉ Useful Information

E-mail tab

While you are logged in to My CallPilot, you can check your e-mail messages. You may also be able to forward and reply, and send new e-mails. See *Setting up links to your e-mail accounts*, page 23.

You can access up to five IMAP e-mail accounts, or another CallPilot mailbox. One of these accounts can be set up for access from your telephone. See *Setting up telephone access to e-mail*, page 21.

You can also set up access to a second CallPilot mailbox, which may be on another server. For setup details, refer to the online Help.

Each E-mail tab shows the name of the account associated with that tab.

To open a message

To open an e-mail message in My CallPilot, click the icon in the Attachments column beside the message, or click any underlined part of the message line.

To delete a message

To mark an e-mail message for deletion, select it and click Delete. To ensure that deleted messages are permanently deleted, open the Messaging Preferences page, and in Environment Settings, check the Empty Trash at logout box.

To compose and send a new message

To compose a new e-mail message, click Compose, type the message, and send it the same way as a CallPilot message. The address book is not available.

To forward and reply to messages

You can forward and reply to e-mails in the same way as CallPilot messages, except that the address book is not available.

Useful Information tab

Click the Useful Information tab to:

- View status and details about your mailbox.
- View online user guides.
- Print online user guide files at your laser printer.
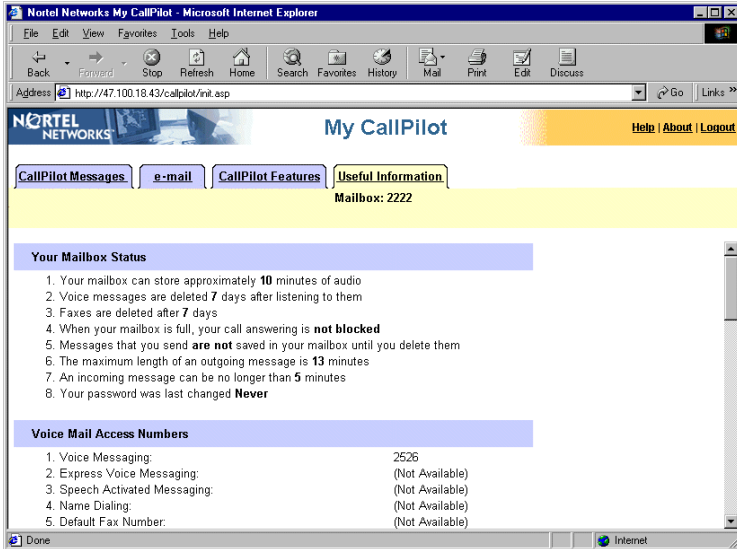
Protecting the security of your mailbox

Because My CallPilot is a web-based product, it is important to take precautions to protect the security of your mailbox.

- If your administrator has enabled SSL encryption, you can use the Secure Login feature for greater security. See *To log in using secure login*, page 5.

- When you have finished using My CallPilot, make sure that you log out. If you go to a web site outside of My CallPilot without logging out, CallPilot does not log out immediately. This can make your CallPilot information vulnerable to hackers. If you want to visit a web site without exiting My CallPilot, use a separate browser window to view the other site.

- You can set CallPilot to log out automatically after a short time, such as 5 or 10 minutes. See *Setting messaging preferences*, page 24.

- If you are using a public or shared workstation, avoid using the Remember Password option when you log in to My CallPilot. If this option is selected, others can access your CallPilot mailbox.

- If you are using a public or shared workstation, you should empty the browser cache after a CallPilot session. For information about your browser cache, see your browser online Help.

Appendix A: Remote Text Notification

Remote text notification sends a message to your wireless e-mail device that notifies you when a new voice, fax, or text message arrives in your CallPilot mailbox.

To set up My CallPilot for remote text notification, see *Setting up message notification*, page 17.

This section describes how to set up remote text notification for Microsoft Outlook and BlackBerry devices. Any device or portal with a service provider that supports SMTP can receive e-mail notification messages. If you plan to use another type of device to receive remote text notification, ask your CallPilot administrator about any additional setup that may be required for your device.

To receive notification messages on a Research In Motion (RIM) BlackBerry Internet Edition device, you must configure Microsoft Outlook and BlackBerry Desktop Manager (version 2 or later) to forward CallPilot notification messages to your BlackBerry device.

If you use a BlackBerry Enterprise Edition device, your administrator can set up notification message forwarding for you on the e-mail server or configure BlackBerry Desktop Manager to redirect CallPilot notification messages.

Note: If you set up My CallPilot to send CallPilot notification to your Outlook Inbox, and set up BlackBerry Desktop Manager to send all incoming messages to your Blackberry, your CallPilot notification messages will appear in your list of e-mails on your Blackberry with no additional configuration required.

Notification message format

An e-mail notification message can show the

- type of message
- name of the person who left the message, if available
- telephone number, if available

For example, John Smith calls from extension 1234 and leaves a voice message for Andrew Jones. An e-mail message is sent to Andrew Jones with the following text:

You have a voice message from John Smith [1234]

Microsoft Outlook forwards this e-mail message to Andrew's BlackBerry device. The message appears with the subject CallPilot Notification. Once Andrew receives the message, he can decide whether to retrieve the message from CallPilot or to call John immediately, using a telephone.

Getting started

Requirements

- You need a BlackBerry device. Ensure that e-mail service on your BlackBerry device is working.
- Microsoft Outlook must be installed. Currently, BlackBerry Desktop Manager only works with Microsoft Outlook. Consult your BlackBerry documentation for information about other e-mail clients.
- BlackBerry Desktop Manager 2 or later must be installed and running on your computer.
- Remote text notification capability must be enabled and set up for your mailbox by your CallPilot administrator.
- Remote text notification must be configured and enabled in My CallPilot. For more information, see *Setting up message notification*, page 17.

Configuration steps

Follow the steps below to effectively manage e-mail notification messages.

| Step	Reference
Create a holding folder for your e-mail notification messages so that they are stored separately from your other messages.	"Creating a notification holding folder" on page 31
If you want to forward all messages in your Outlook inbox to your BlackBerry device, you can skip this step.	
Configure BlackBerry Desktop Manager to forward messages to your BlackBerry device.	"Configuring BlackBerry Desktop Manager" on page 34
If desired, configure Outlook to automatically delete old CallPilot notification messages from the holding folder.	"Automatically removing notification messages" on page 35
Alternatively, you can manually delete notification messages from the holding folder.	

Creating a notification holding folder

You can create a holding folder for your CallPilot e-mail notification messages so that they are stored separately from your other messages. To store messages in the folder, follow these steps:

1   Create an Outlook folder for the notification messages.
2   Configure Outlook to route CallPilot notification e-mail messages to the folder using the Rules Wizard.

To create a notification folder

1   Start Outlook.
2   In the Folder List, select Outlook Today.
3   From the File menu, choose New > Folder. The Create New Folder dialog box appears.
4   In the Name box, type CallPilot Notification, and then click OK. The CallPilot Notifications folder appears in the Folder List.
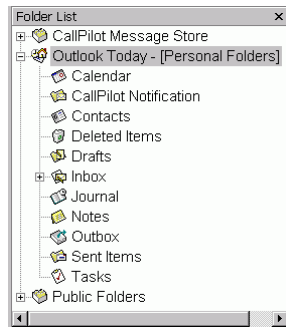

To route notification messages to the holding folder

1   Choose Tools > Rules Wizard. The Rules Wizard dialog box appears.
2   Click New. The first panel of the Rules Wizard appears.
3   In the list of rule types, select Check messages when they arrive, and then click Next.
4   In the list of rule conditions, check With specific words in the subject box.

5 In the Rule description box, click specific words. The Search Text dialog box appears.
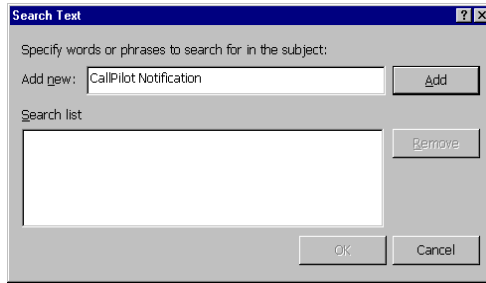

6 In the Add new box, type CallPilot Notification.

7 Click Add. The text "CallPilot Notification" is added to the Search list box.

8 Click OK. The search text "CallPilot Notification" appears in the rule description.
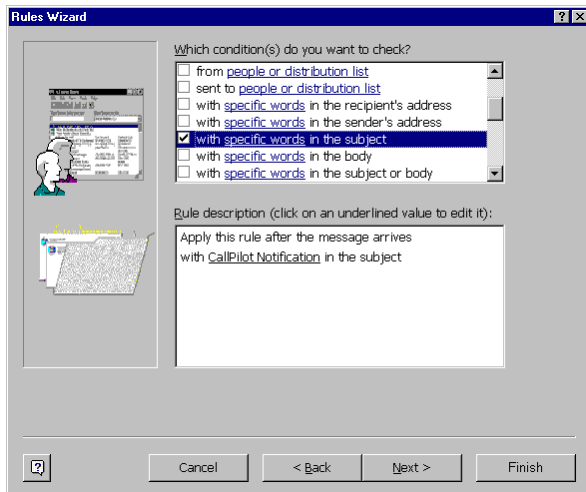
9 Click Next.

10 In the list of actions, check the "move it to the specified folder" box.

11 In the Rule description box, click "specified". A list of Outlook folders appears.

12 In the folder list, choose CallPilot Notifications, and then click OK. The folder name appears in the rule description.

13 Click Finish. The finished rule is shown below:
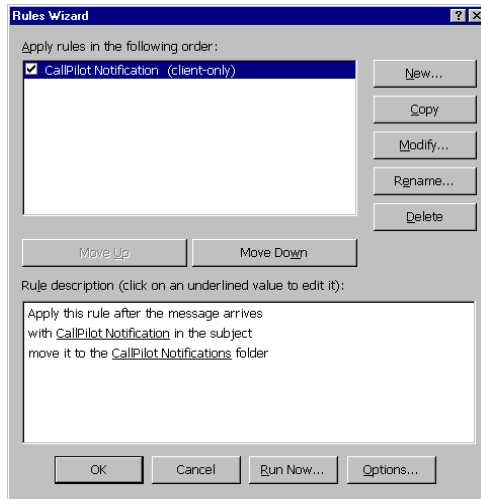
14 Click OK to close the Rules Wizard.

Configuring BlackBerry Desktop Manager

This section explains how to configure BlackBerry Desktop Manager to redirect your e-mail notification messages.

If you did not create a holding folder for notification messages, and if you already configured BlackBerry Desktop Manager to forward messages in your Outlook Inbox, you can skip this section.

To configure e-mail redirection

1   From the Windows Start menu, choose Programs > BlackBerry > Desktop Manager. BlackBerry Desktop Manager appears.

2   In the application list, double-click Redirector Settings. The Redirector Settings dialog box appears.

3   Click the Advanced tab.

4   In the Folder redirection section, choose Selected folders.

5   Click Choose Folders… . The Choose Folders dialog box appears.

6   Select the folders where you receive messages that you want to redirect to your BlackBerry device.

‣   To redirect messages in your holding folder, select the CallPilot Notification folder.

‣   To redirect all messages in your Outlook Inbox, select the Inbox folder.

7   Click Save to save your folder selection.

8   Click OK to save your redirection options.

9   Exit BlackBerry Desktop Manager.

Automatically removing notification messages

This section explains how to configure Outlook to automatically remove messages from the CallPilot Notifications holding folder using the AutoArchive feature. If you do not want Outlook to automatically delete notification messages, you can manually delete them from the folder.

ATTENTION

If you currently do not use AutoArchive, ensure that you become familiar with this feature before you activate it. You may have existing folders with AutoArchive settings that have never been activated. If you activate AutoArchive to automatically delete messages from the CallPilot Notifications folder, you may find that messages in other folders are being archived as well.

If you are unsure about what to do, check with your local Microsoft Outlook support group.

You must perform two steps to configure automatic deletion of notification messages:

1 Set up AutoArchive to delete messages from the CallPilot Notifications folder.
2 Activate the AutoArchive feature.

To set up deletion of notification messages

1 In the Outlook folder list, right-click the CallPilot Notifications folder, and then choose Properties. The CallPilot Notification Properties dialog box appears.
2 Click the AutoArchive tab.
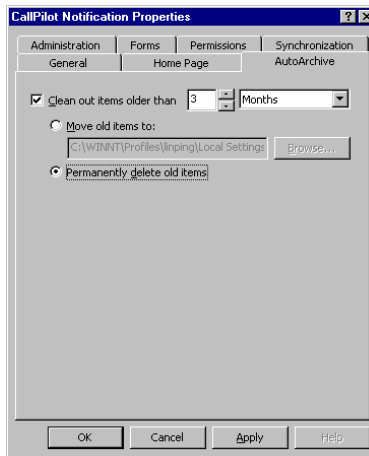
3 Select the "Clean out items older than" check box.

4 Set the time to 1 day.

5 Select Permanently delete old items.

6 Click OK.

To activate AutoArchive

1 In Outlook, choose Tools > Options.

2 Click the Other tab.

3 Click AutoArchive. The AutoArchive dialog box appears.
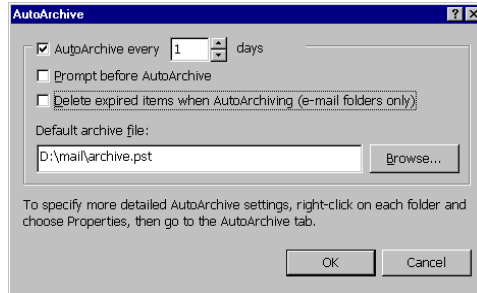
4 Check the AutoArchive every… box and set the frequency to 1 day.

5 Click OK to close the dialog box.

6 Click OK to close the Options dialog box.

**My CallPilot
User Guide**

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