NØRTEL
NETWORKS™

CallPilot™

Release 2.5

Desktop Messaging User Guide

for My CallPilot

CallPilot Desktop Messaging User Guide for My CallPilot

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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 through a web client. 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:

Windows-based hardware and software

- Windows 98 SE, Windows 2000 Professional, or Windows XP
- Internet Explorer 5.x and 6.x, or Netscape 6.2x and later
- 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

Macintosh-based hardware and software

- PowerPC G3 processor or newer (PowerPC G4 preferred)
- Mac OS version 9.0 or 9.1(preferred)

Note: The Mac My CallPilot Web Client software is not designed for compatibility with Mac OS X. Although this version of the CallPilot application may run in 'OS 9 Compatibility mode', it may crash or behave erratically.

- Internet Explorer 5.1 (or newer) or Netscape Communicator 6.2 (or newer)
- QuickTime version 4.0 or newer
- AppleScript version 1.3 or newer
- TCP/IP network connection of at least 56 Kbit/s
- MacOS-supported sound output device (speakers)
- MacOS-supported sound input device (microphones)

Note: The type of microphone to use depends on the type of Macintosh the user has, and a microphone designed for a Windows-based PC will often not work. Some older PowerPC Macs require a PlainTalk microphone, or similar. The system administrator should verify that the user has a working microphone and speaker setup before installing CallPilot.

Peripheral hardware and software

- Video display and monitor with 8-bit (256-color) 800 x 600 capability (1024 x 768 16-bit color preferred)
- Nortel Fax Driver and CallPilot Desktop Messaging to create faxes

- CallPilot 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*, on page 32.) Some Windows-based systems and all Macintosh systems will not display the embedded player. If not, you will be prompted to download the CallPilot Player. If you are on a Windows-based platform and 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.
- A LAN (Ethernet), ISDN, ADSL, or dial-up modem connection to the CallPilot server for accessing CallPilot messages

To download audio players

You need an 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. The various downloadable players are shown below.
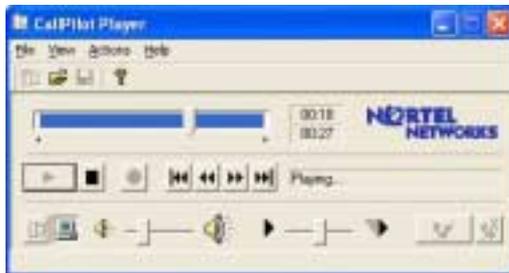
The Windows downloadable CallPilot player
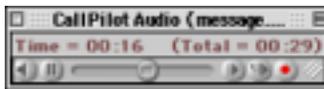
The Macintosh downloadable CallPilot player with QuickTime 4.0
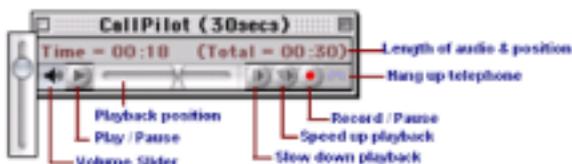
The Macintosh downloadable CallPilot player with QuickTime 5.0

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**.
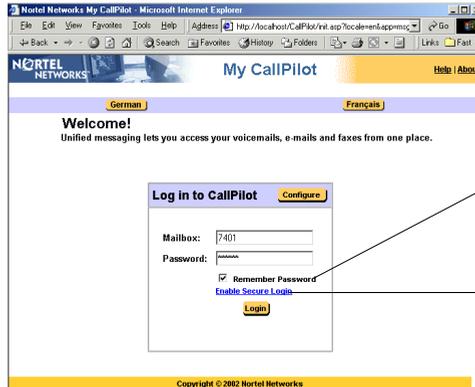
Do not check the Remember Password box on a shared computer.

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. Click **Configure**, type the server details, 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 access voice messages and view faxes, delete, forward, and reply to messages, and compose new messages.

Your Message List

Messages tab —

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

Urgent
Private
Attachments:
Voice
Fax
Text

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*, on page 12, and *Viewing fax messages*, on page 14.

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*, on page 32, 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*, on page 11.

To play a voice message the quick way (Windows only)

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*, on page 32. Note that the player can also play WAV format audio files.)

1 In your Message List, click the Voice (**Play**) icon in the Attachments column. When the audio controller window appears (Windows version shown below), press the **Play** button if playing does not start automatically.

Embedded Windows CallPilot Player

Controls on other audio players vary

Play/Re-play   Stop   Disconnect   Call Sender

Play messages from computer or telephone
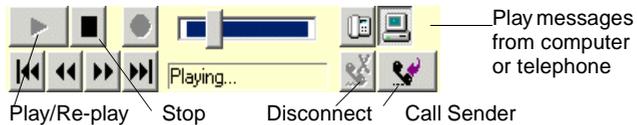
2 If you selected **Computer** for playback, the audio player plays your message from your computer's speakers.
If you selected **Telephone** for playback, your telephone rings and plays the message when you answer.

3 Use the player buttons to stop, re-play, or call the sender. Other controls on the player also permit absolute positioning within a recording, volume level adjustment, and altering the play rate (speed).

4 Click **Disconnect**, or hang up the telephone when you are finished.

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/pause, re-play, or call the sender (Windows only). Other controls on the player also permit absolute positioning within a recording, volume level adjustment, altering the play rate (speed), and disconnecting (hanging up).

Note: On the Macintosh CallPilot Player, there is no Stop button. When you click the Play button, play begins and the Play button then becomes the Pause button. In addition, the audio control commands can be accessed via the Audio menu of the Macintosh CallPilot Player.

5 Click the **Disconnect** (Windows) or **Hang Up** (Mac) button, or hang up the telephone when you are finished. 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 ImageMaker or other imaging software installed on your Windows-based computer. For Macintosh users, the CallPilot Player application is used to view faxes. In addition, your CallPilot administrator must enable fax capability for your mailbox in order for you to receive faxes.

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. The fax can then be scaled to its normal (printed page) size, to an enlarged view that still fits on typical displays, to a maximum size where every pixel is visible, or to a view where a fax page is made to fit the current window size. The fax document may also be rotated to 90, 180, or 270 (-90) degrees.

3 When you have finished, close the fax image to return to your messages.
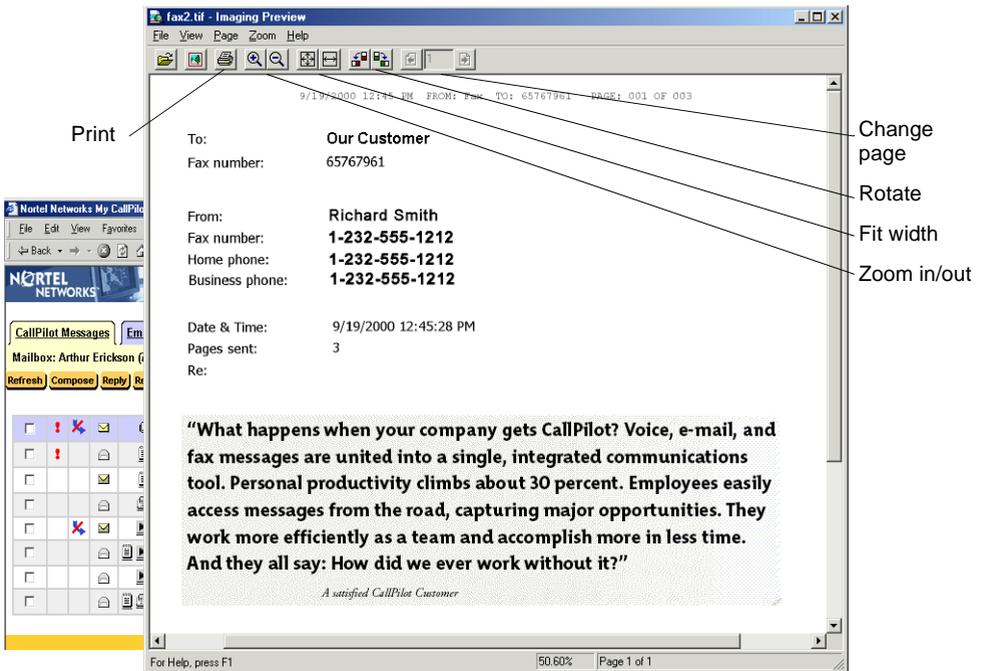
Note: If you are using Windows imaging software other than ImageMaker or if you are working on a Macintosh, the appearance of the fax message may differ from the one shown. In addition, some of the controls seen here, such as Zoom in and Zoom out, may not be available.

In the Macintosh CallPilot Player, the control commands are accessed via the Fax menu.

Composing voice messages

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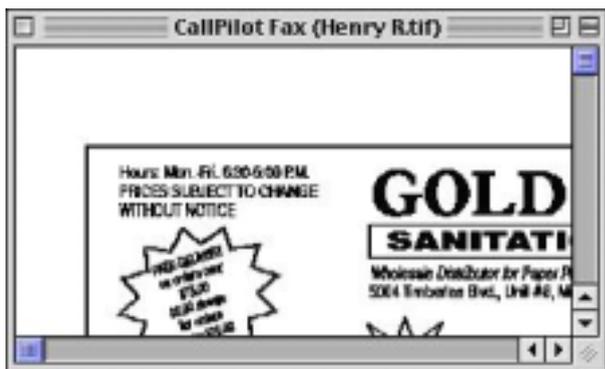
You can compose a message that is any combination of voice, fax, or text. To record voice messages, use the embedded or the downloaded CallPilot Player.

Note: Your system administrator may have My CallPilot Voice Blocking enabled. If enabled, My CallPilot users will not be able to save a voice message to their local PC or forward voice messages to non-CallPilot addresses. However, you will still be able to forward voice messages to addresses in CallPilot format.

To record and send a new voice 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*, on page 23.

3 Add a subject description in the **Subject** field.

4 In the embedded or downloaded Windows CallPilot Player, select the **Telephone** or **Computer** icon. If you are using a Macintosh, select either **Use Telephone** or **Use Macintosh** from the CallPilot Player's Audio menu.
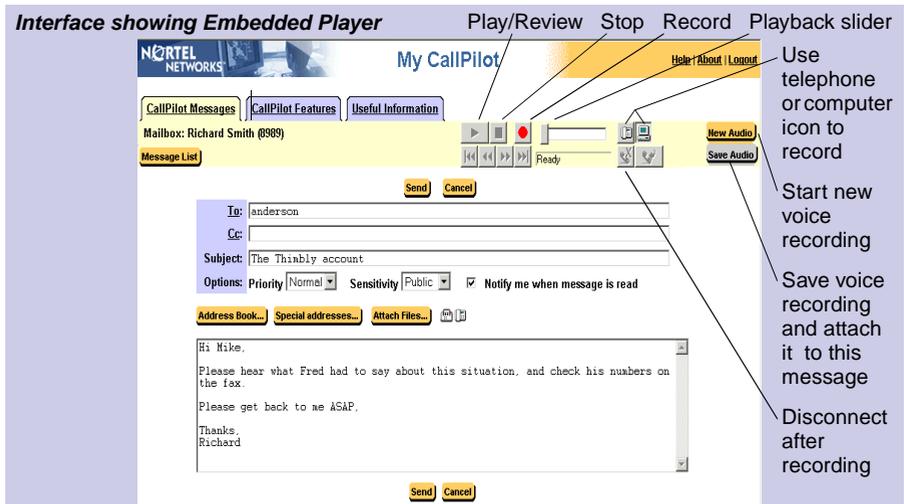
5 Click the **Record** button.

Note: You can only record into a new audio window, not to audio files that exist in your inbox.

Note: On the Macintosh CallPilot Player window (QuickTime version 5.0 shown below), there is no Stop button.
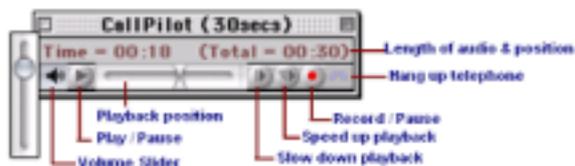
*When you click the **Record** button, recording begins and the **Record** button then becomes the **Pause** button.*

6 ‣ If you are recording from the computer, record your message into the microphone. Click **Pause** to pause the recording. 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 into the handset. Click **Pause** to pause the recording. 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.

Note: Saving your audio works a little differently depending on which version of the CallPilot player you are using. If you are using the embedded version, the **Save Audio** button will only save the message as an attachment to the current message. If you are using the downloaded (standalone) version, you save the recording as a file, which you then attach to your message.

7 If you are using the standalone version of the Player,add your voice message file as an attachment and set options if required. See *Adding attachments to messages*, on page 21, and *Setting message options*, on page 22.

8 Click **Send**.

To save a newly-created voice message as a file

If you have a requirement to save a copy of your voice recording as a standalone file you must use the standalone CallPilot player, not the embedded Player.

1 Open the CallPilot 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.
Note: 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 Launch the application you want to use to create a fax with. The document you open or create must be 8.5 in. (21.5 cm) wide or less. Multiple page documents are allowed.

2 When the document is ready:

‣ **Windows computer:**

   a. Click Print or Print Setup under the File menu.

   b. From the list of printers, select Nortel Fax.

‣ **Mac computer:**

   a. First select the Chooser desk accessory from the Apple Menu

   b. Then select the CallPilot Fax icon and close the window.

3 Click Print and then OK.

4 In the Compose Fax dialog box, click Save As.
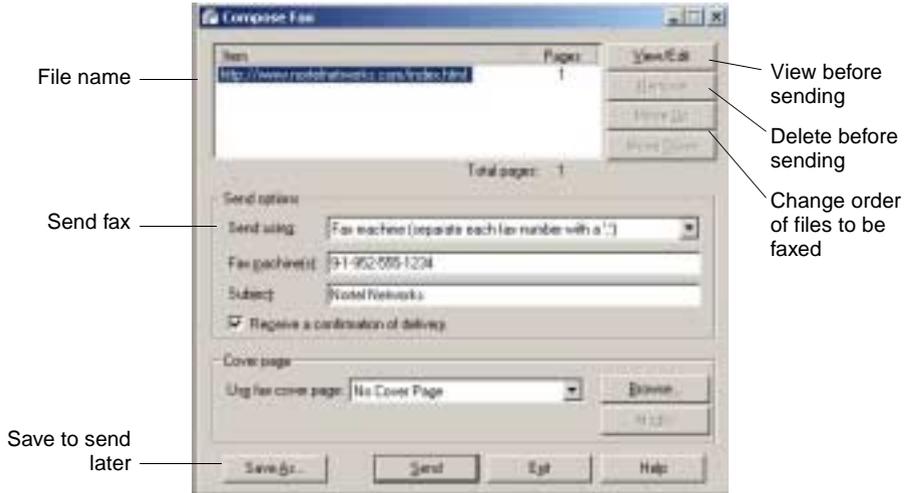
Compose Fax dialog box - Windows version.
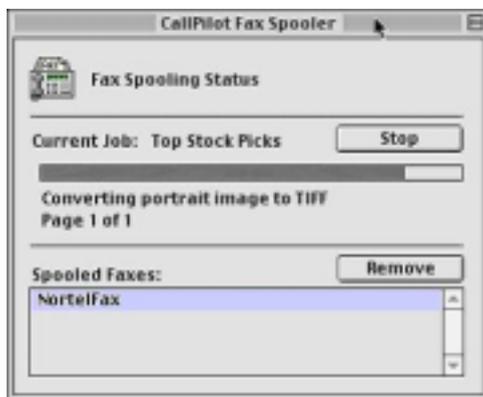
Compose Fax dialog box - Macintosh version.

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**.

Note: If you chose to include a Subject line here, the information in that field will only be displayed in the e-mail portion of the fax. It will not be displayed on a hard copy of the fax.

6 Click **Exit** to close Compose 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*, on page 23.

3 Add a fax file as an attachment. See *Adding attachments to messages*, on page 21.

4 Add options if required. See *Setting message options*, on page 22.

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
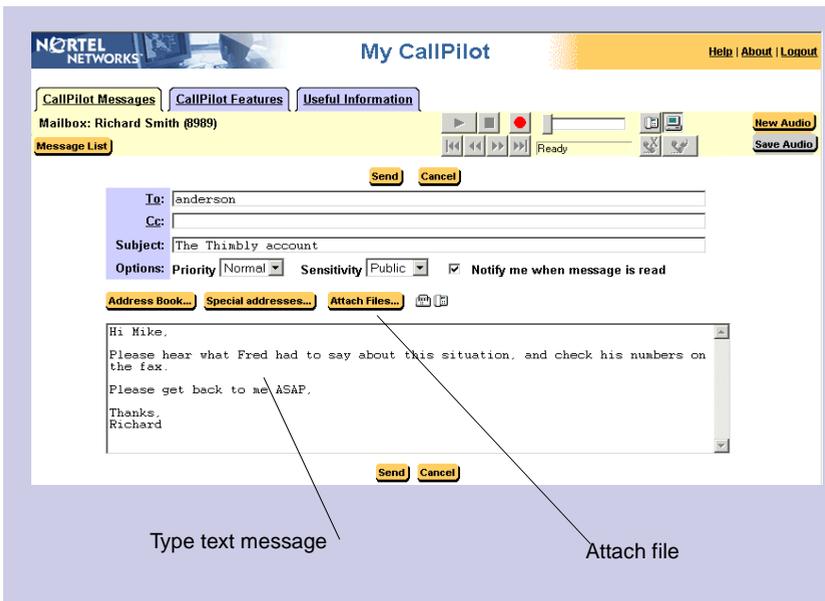
Before sending a message, you can attach a voice, fax, or text file to it. Voice files can be either VBK or WAV format for both Windows and Mac CallPilot recipients. My CallPilot automatically converts VBK files to WAV files when sending to non-CallPilot users. Fax files must be TIF format. Text files 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** for the 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 when you send a message marked **Private**, your recipient may still forward it to someone else, if they are not a CallPilot user. Also, recipients in non-CallPilot systems will not be informed of Private settings. In your message, tell the recipient that the message is Private.

▸ For **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
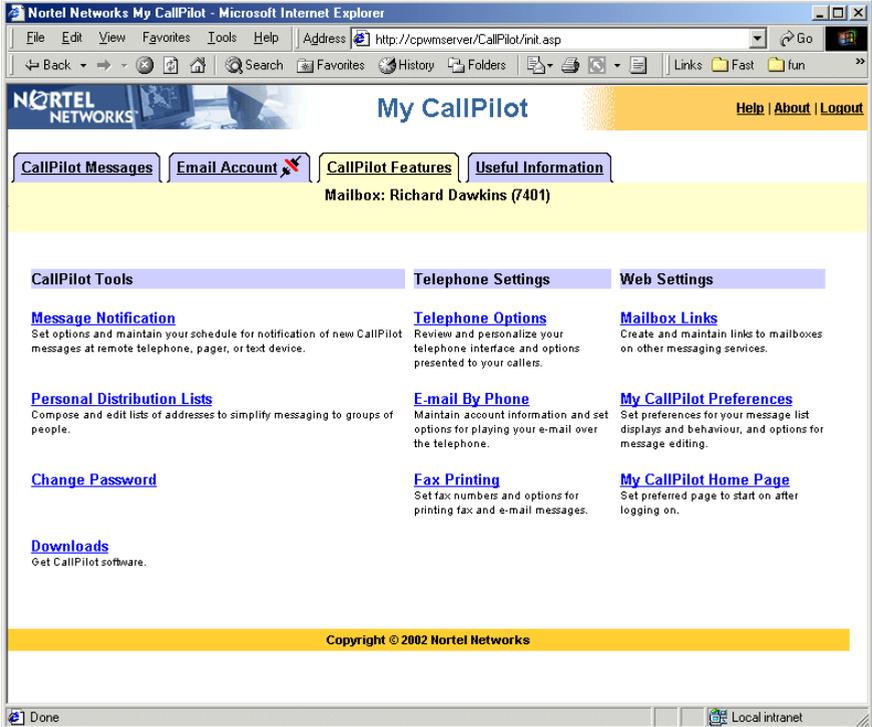
CallPilot can notify you of new messages when you are away from the office. Your administrator defines whether these devices and services are available to you:

- Remote text notification to a wireless e-mail device. See *Appendix A: Remote Text Notification*, on page 38.
- 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
- ☑ Tuesday
- ☑ Wednesday
- ☑ Thursday
- ☑ Friday
- ☐ Saturday
- ☐ Sunday

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 CallPilot 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.
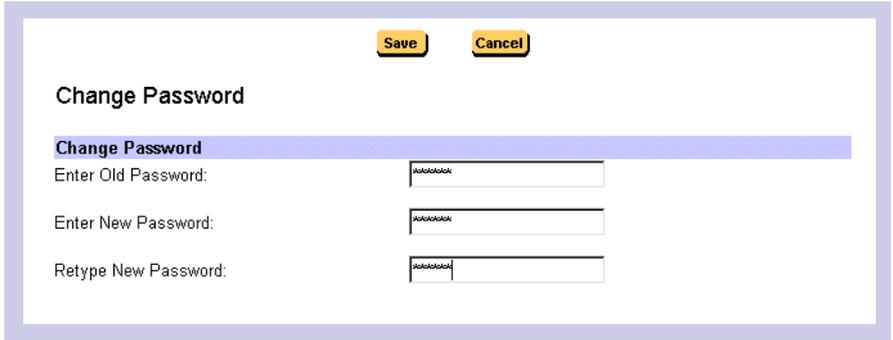
| Save | Cancel |

Change Password

Change Password

Enter Old Password:	*******
Enter New Password:	*******
Retype New Password:	*******

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 do not 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

To set up access to your e-mail accounts from CallPilot, see *Setting up links to your e-mail accounts*, on page 31. 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*, on page 31.

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.

Save	Cancel

Fax Printing

Fax Messages Printing

Default fax number for printing: 338-7401

☑ Auto Print new fax messages as received

☑ Print a separator page with each printout

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*, on page 29. 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

CallPilot Features

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 (Windows only) in your Message List.
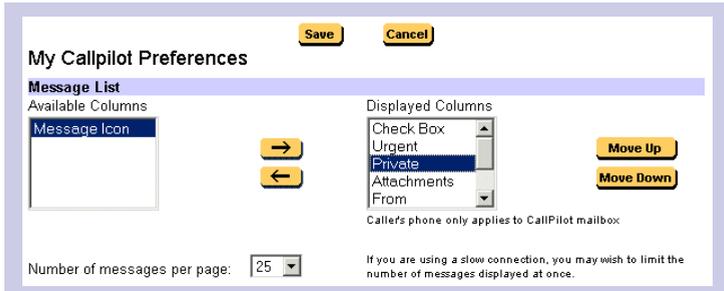
To add a signature

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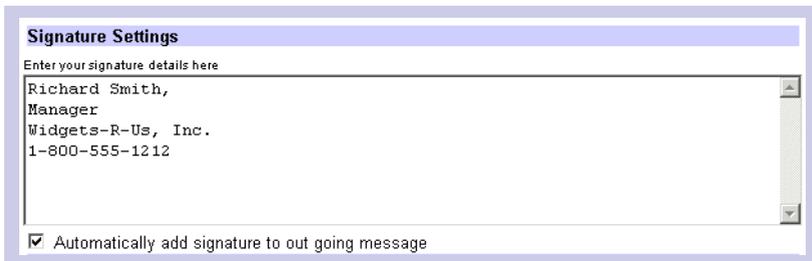
To change environment settings

Change any of these My CallPilot settings to your preferences.

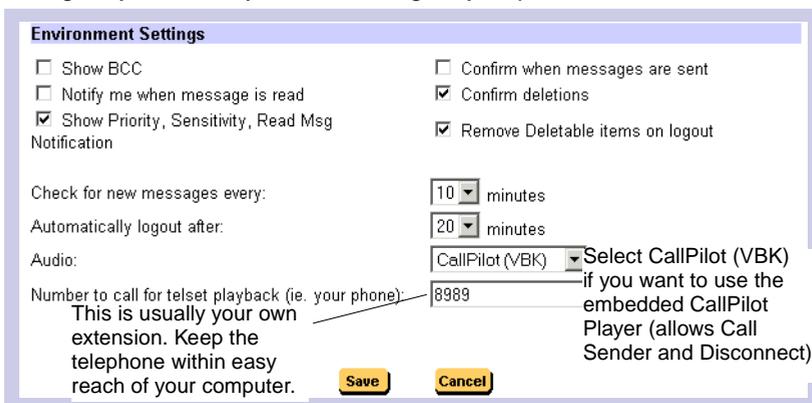**Note:** The Remove Deletable items on Logout checkbox applies to both regular e-mail messages as well as messages you access when using E-mail-by-Phone. This checkbox must be selected to enable the removal of messages that you have deleted when you logout.

Macintosh Preferences window

The Preferences option under the Edit menu allows the following user settings to be saved for the CallPilot Player application on the Macintosh.

The defaults are: Macintosh audio device, all settings checked.

Note: It is possible that you may see the Audio Device section "grayed out". This happens if the Mailbox class is set to restrict the user to use a specific device (telephone or PC/Mac).

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*, on page 31.

Note: to access e-mail from My CallPilot, the TLS field for the external e-mail server must be set to "0", unless it supports SSL IMAP connections.

You can access up to five IMAP e-mail accounts, or other CallPilot mailboxes. One of these accounts can be set up for access from your telephone. See *Setting up telephone access to e-mail*, on page 29.

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

Useful Information

Click the Useful Information tab to:

- View status and details about your mailbox.
- View online user guides.
- Print online user guide files on your laser printer.

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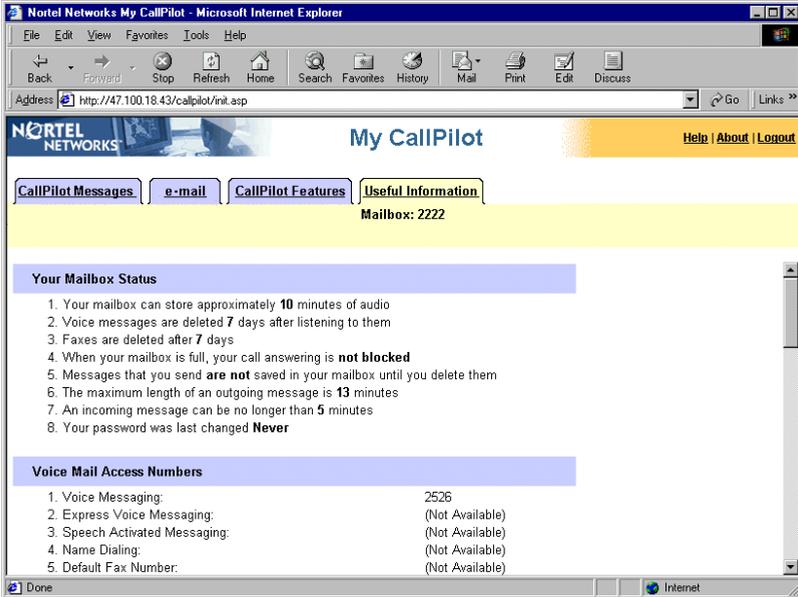
Because My CallPilot is a web-based product, it is important to take precautions to protect the security of your mailbox.

- If your administrator has enabled SSL encryption, you can use the Secure Login feature for greater security. See *To log in using secure login*, on page 10.

- 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*, on page 32.

- 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 can be configured to send a message to your SMTP e-mail account when a new voice, fax, or text message arrives in your CallPilot mailbox. You can setup notification to any e-mail server that supports SMTP. These include most e-mail accounts, wireless handheld organizers, mobile phones, or PDAs like the Research In Motion Blackberry.

To set up My CallPilot for remote telephone or pager notification, see *Setting up message notification*, on page 25.

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 device, your CallPilot notification messages will appear in your list of e-mails on your Blackberry device 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*, on page 25.

Configuration steps

Complete the following steps 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 40
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 43
If desired, configure Outlook to automatically delete old CallPilot notification messages from the holding folder.	"Automatically removing notification messages" on page 44
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.
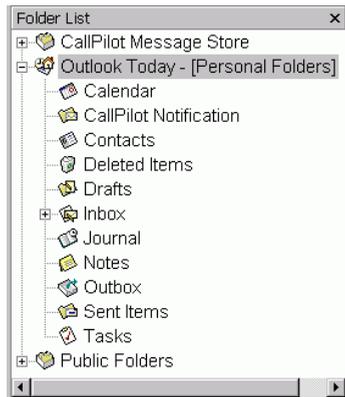

To route notification messages to the holding folder

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.
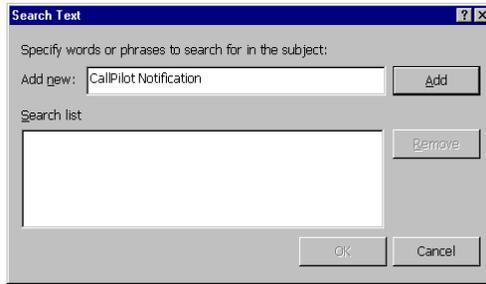

6 In the Add new box, type CallPilot Notification.

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.
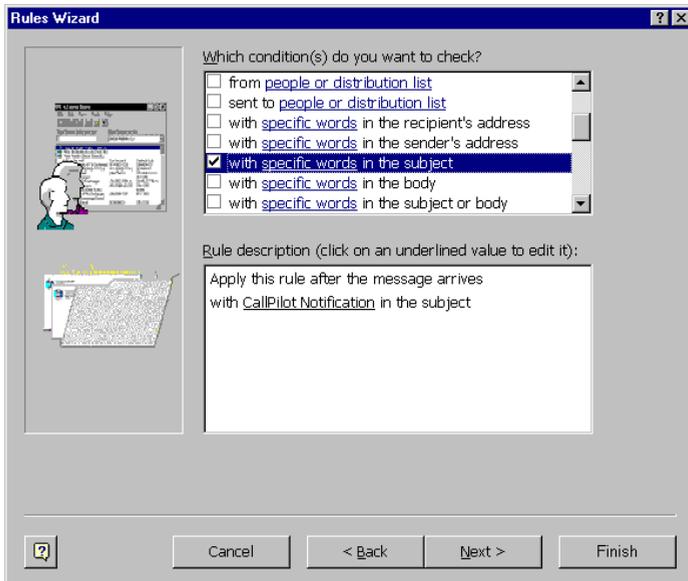
9 Click Next.

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:
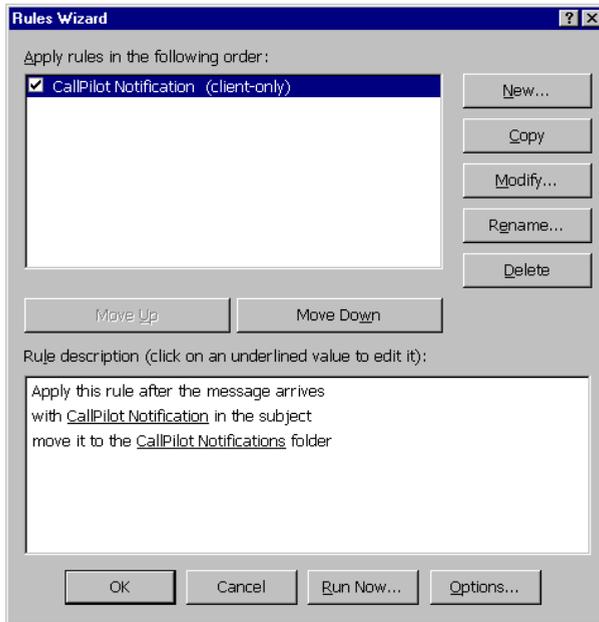
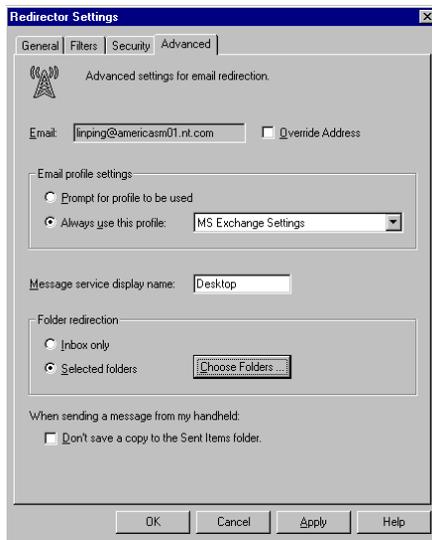**14** Click OK to close the Rules Wizard.

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.
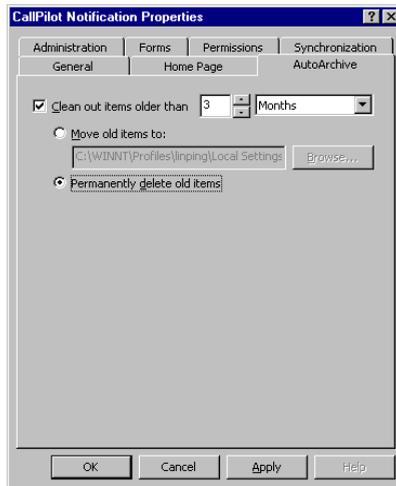
3 Select the "Clean out items older than" check box.

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.
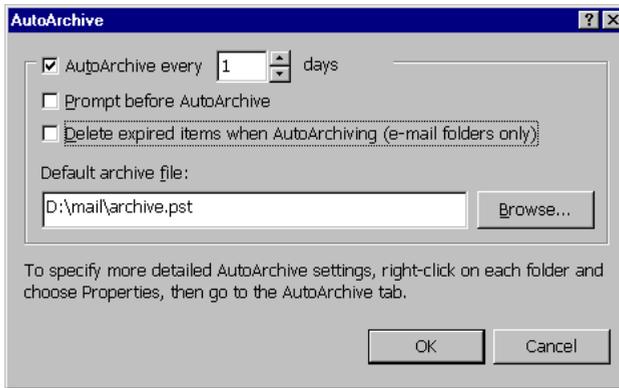
4 Check the AutoArchive every… box and set the frequency to 1 day.

5 Click OK to close the dialog box.

6 Click OK to close the Options dialog box.

CallPilot Desktop Messaging User Guide
for My CallPilot

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