Avaya CallPilot® Desktop Messaging User Guide for Microsoft Outlook

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For the most current versions of Documentation, see the Avaya Support Web site: http://support.avaya.com.

Contact Avaya Support

Avaya provides a telephone number for you to use to report problems or to ask questions about your Product. The support telephone number is 1-800-242-2121 in the United States. For additional support telephone numbers, see the Avaya Web site: http://support.avaya.com.

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Chapter 1: Customer service

Visit the Avaya Web site to access the complete range of services and support that Avaya provides. Go to www.avaya.com or go to one of the pages listed in the following sections.

Navigation

- Getting technical documentation on page 7
- Getting product training on page 7
- Getting help from a distributor or reseller on page 7
- Getting technical support from the Avaya Web site on page 8

Getting technical documentation

To download and print selected technical publications and release notes directly from the Internet, go to www.avaya.com/support.

Getting product training

Ongoing product training is available. For more information or to register, you can access the Web site at www.avaya.com/support. From this Web site, you can locate the Training contacts link on the left-hand navigation pane.

Getting help from a distributor or reseller

If you purchased a service contract for your Avaya product from a distributor or authorized reseller, contact the technical support staff for that distributor or reseller for assistance.

Getting technical support from the Avaya Web site

The easiest and most effective way to get technical support for Avaya products is from the Avaya Technical Support Web site at www.avaya.com/support.

Chapter 2: Using Desktop Messaging for Microsoft Outlook

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

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

- Listen to voice messages.
- View and print fax messages.
- Record and send voice messages.
- Create and send fax messages, including batch faxes.
- Forward and reply to voice and fax messages.
- Contact the sender of a message.
- Add message options such as urgent and private.
- Spell-check messages before you send them.
- Add voice, fax, or text file attachments to messages.
- Address messages to CallPilot users on local and remote servers, as well as to non-CallPilot addresses.
- Start an instant messaging session from a message.
- Create personal distribution lists.
- Change your CallPilot password.
- Access web-based My CallPilot to view user information and change your feature settings.

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

Getting started

About this guide

This user guide describes how to use CallPilot with your Microsoft Outlook e-mail.

The instructions and screen images shown in this guide provide general information for using CallPilot with your e-mail. Specific details can vary depending on your computer operating system, the version of Outlook you are using, and the features available for your CallPilot mailbox.

Desktop Messaging also includes online Help. To access it, from the Outlook Help menu, point to CallPilot Desktop Messaging, and then click Help Topics.

What you need

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

- CallPilot Player to play and record voice messages
- Avaya Fax Driver to create faxes
- Microsoft Outlook 2002 (XP), Microsoft Outlook 2003, or Microsoft Outlook 2007
- Windows 2000 Professional, Windows XP Professional, or Windows Vista
- Monitor with 256-color 800 x 600 capability
- 15 MB of free disk space to install software
- Sound card and speakers for playing voice messages on your computer
- Microphone connected to your computer, or a telephone situated near your computer, for recording voice messages
- LAN (Ethernet), ISDN, ADSL, or dial-up modem connection to the CallPilot server for accessing CallPilot messages
- For My CallPilot access:
    - For Windows: Internet Explorer 6.0 and 7.0, Firefox 2.0 for Windows
    - For Macintosh: Safari 1.3.2 for Macintosh OS X

- For Linux: Mozilla 1.7.x, Firefox 2.0

For updates on the latest supported versions, contact your CallPilot administrator.

Logging on

When you log on to your Outlook e-mail, you can log on to CallPilot Desktop Messaging at the same time.

When you log on to Desktop Messaging for the first time, the software prompts you to choose where you want to store your CallPilot messages, if this option is available to you. Your choices are:

- your e-mail inbox, so that your CallPilot messages are combined with your regular Outlook e-mail
- a separate CallPilot inbox, so that your CallPilot messages are kept separate from your regular Outlook e-mail

You can change this location at any time after the first time you log on. For more information, see Changing the inbox to which your CallPilot messages are delivered on page 47.

To log on from Microsoft Outlook

1. Open your Microsoft Outlook e-mail.

   The CallPilot Logon dialog box appears.
2. In the Mailbox box, type or select your mailbox number.
3. In the Password box, type the password for this mailbox.
4. Check Remember password if you want CallPilot to log on automatically.

   Note:
   Do not leave the Remember password box checked on a shared computer.
5. Click OK.
6. If you are logging on for the first time, the software might prompt you to choose an inbox for your CallPilot messages, and then to choose download options for your CallPilot Address Book. Respond to the prompts as required.

   When you log on, your Outlook window appears. Your new CallPilot messages, if you have any, appear in the inbox you specified.

To log off

When you exit Microsoft Outlook, you automatically log off from CallPilot.

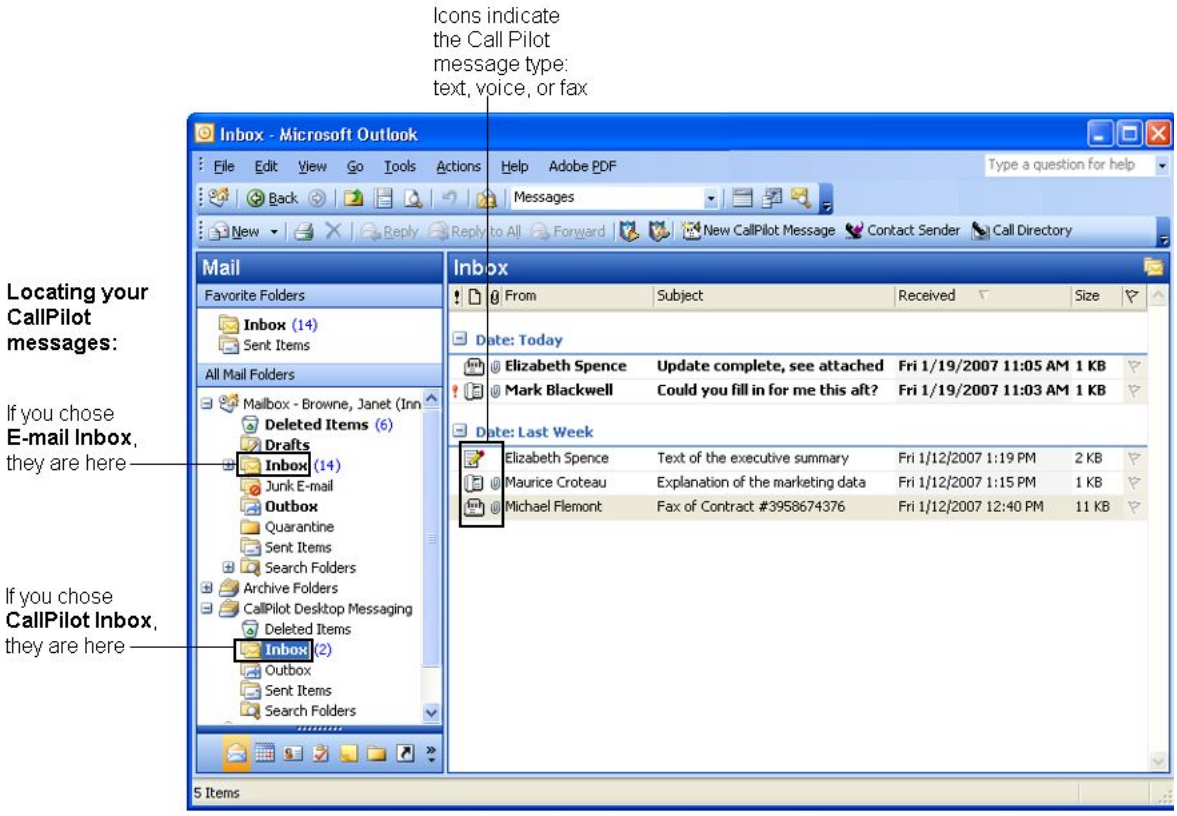
Remote login

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

Working with your CallPilot messages

When you open your e-mail with CallPilot installed, your CallPilot messages appear in the inbox your chose the first time you logged on.

Note:
At some sites, you may not have the option to choose your inbox; your CallPilot administrator may specify the inbox location for you.



Note:

If you chose E-mail Inbox, your mail folders list might still contain the separate CallPilot Desktop Messaging folder, even though you chose not to use it. This is temporary; when you close and then reopen Outlook, the CallPilot Desktop Messaging folder no longer appears.

To check for new messages

The CallPilot Message Waiting Indicator in the notification area of your taskbar turns red and notifies you when you have a new message. For more tips on using the Message Waiting Indicator, or to turn it on or off, see Using the Message Waiting Indicator on page 52. New messages appear in bold.

To open a message

To open a CallPilot message, double-click anywhere on the message line. See Playing voice messages on page 15, and Viewing fax messages on page 16.

To delete a message

To delete a CallPilot message in your inbox, click on the message to select it, and then click the Delete icon on the toolbar. You can also click the Delete icon in an open CallPilot message. The deleted message moves to the Deleted Items folder. When you log out, or click Exit from Outlook, your CallPilot messages in the Deleted Items folder are immediately deleted without confirmation.

To mark CallPilot messages as read or unread

In your inbox, unread messages appear in bold text and read messages appear in plain text. You can change whether a message is marked as read or unread using a shortcut menu. These changes also affect your Message Waiting Indicator. For example, if you have no unread messages, and you then mark one as unread, your Message Waiting Indicator turns back on.

1. In your inbox, select one or more messages (hold down the Ctrl key to select more than one).
2. Right-click the selected messages, and then click either Mark as Unread or Mark as Read.

   These options are also available from the Edit menu in Outlook.

   From CallPilot Player, you can change the status of an open message by choosing Edit > Mark as Unread.

To organize your messages

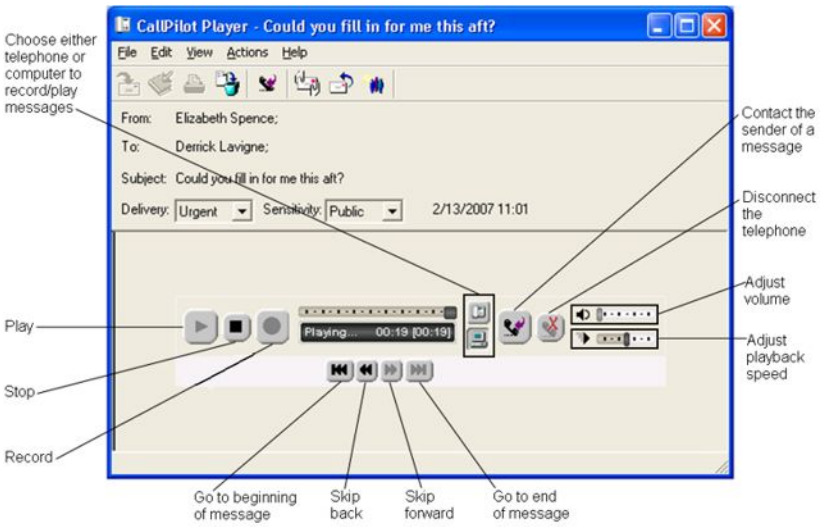
To organize your messages, you can create new CallPilot folders in Outlook and move your messages to these folders. As long as the new folders are within the same Outlook folder set as your incoming CallPilot messages, you can access them when you log on by telephone or

through My CallPilot. If you move CallPilot messages to a PST file, they are no longer accessible by telephone or through My CallPilot.

Playing voice messages

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

The following illustration shows the controls you use on the CallPilot Player to work with voice messages.



To select your telephone or computer to play voice messages

You can choose to play your voice messages from your telephone or your computer. To change from one to the other, or to change the telephone number that CallPilot dials, see Changing audio settings on page 64. You can also click the telephone or computer icon on the CallPilot Player to change the setting.

To play a message from your telephone

1. To play a voice message when your telephone is selected for playback, double-click the message in your inbox, and answer your telephone when the telephone rings.
2. Use the buttons on the CallPilot Player to play or stop the message, go backward and forward, and contact the sender.
3. When you are finished, hang up, and close the message.

To play a message from your computer

1. To play a voice message when your computer is selected for playback, double-click the message in your inbox. The message plays through your computer speakers or your headphones.
2. Use the buttons on the CallPilot Player to play or stop the message, go backward and forward, adjust the volume and speed, and contact the sender.
3. When you are finished, close the message.

Note:

When connected to your alternate CallPilot server (see Using the Message Waiting Indicator on page 52), your CallPilot player functions are limited to: Skip Back, Play Message (including Playback Controls), Skip Forward, Previous Message, Play Envelope, Go To and Logoff.

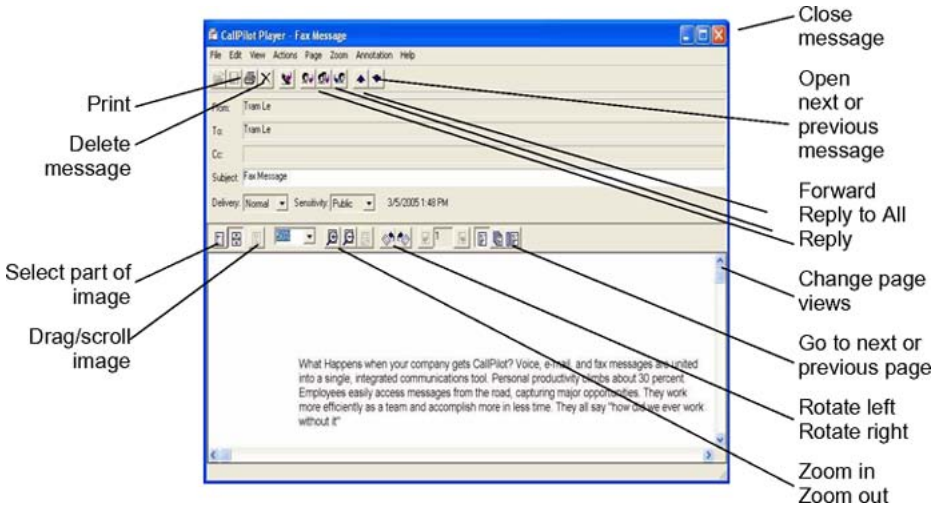
Viewing fax messages

Note:

For you to receive faxes, your CallPilot administrator must enable fax capability for your mailbox.

To view a fax message

1. Double-click a fax message in your inbox. When you open a fax-only message, the fax image appears right away. In mixed voice, fax or text messages, click the Fax icon to view the fax.
2. While viewing the fax, you can enlarge or reduce the image, rotate or move the fax, print the fax, delete the fax, save the fax, add a voice annotation to the saved file, forward the fax, and reply to the fax.
3. When you are finished, close the message.



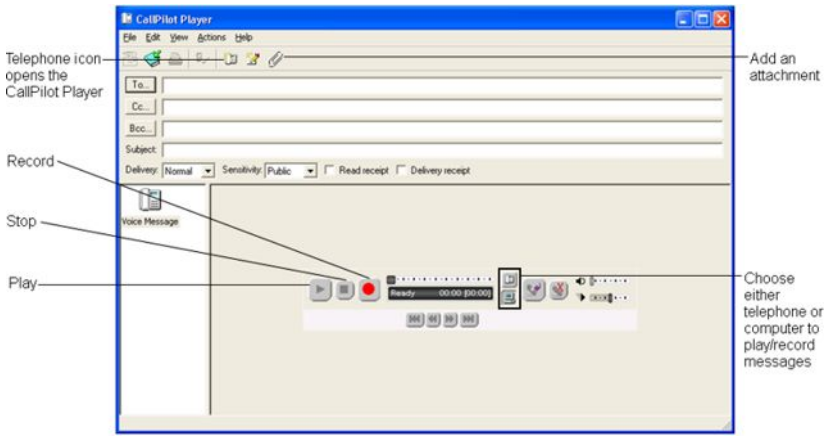
Composing voice messages

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

To record and send a voice message

1. In your inbox, click the New CallPilot Message button on the toolbar.

   The CallPilot message form with the CallPilot Player appears.



Note:

If the CallPilot Player is not already open, in the new message form, click the Telephone icon in the toolbar to open it.

2. Choose how you want to record the voice message: On the CallPilot Player panel, click either the telephone or computer icon.
3. To start recording, click the red Record button.
4. Do one of the following:
   - 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, and then click Stop.
   - If you are recording from the telephone, answer when the telephone rings. At the tone, record your message. Click Stop to end the recording. Click Play to review it.
5. To address the message, click To. Alternatively, type a formatted address in the To box. For more information about addressing options, see Addressing messages on page 40.
6. Add a subject line, attachments, and options if required. See Adding attachments to messages on page 36, and Setting message options on page 37.
7. On the toolbar, click the Send Message icon.

To save a newly created voice message as a file

1. In a new message, record a message.
2. On the File menu, click Save as.
3. In the File name box, type a name for the file, and then select a folder in which to keep the file.
4. Click Save. Save voice files as VBK files. CallPilot can automatically convert VBK files to WAV files when sending to non-CallPilot users. See Changing mail delivery settings on page 59.

Composing fax and text messages

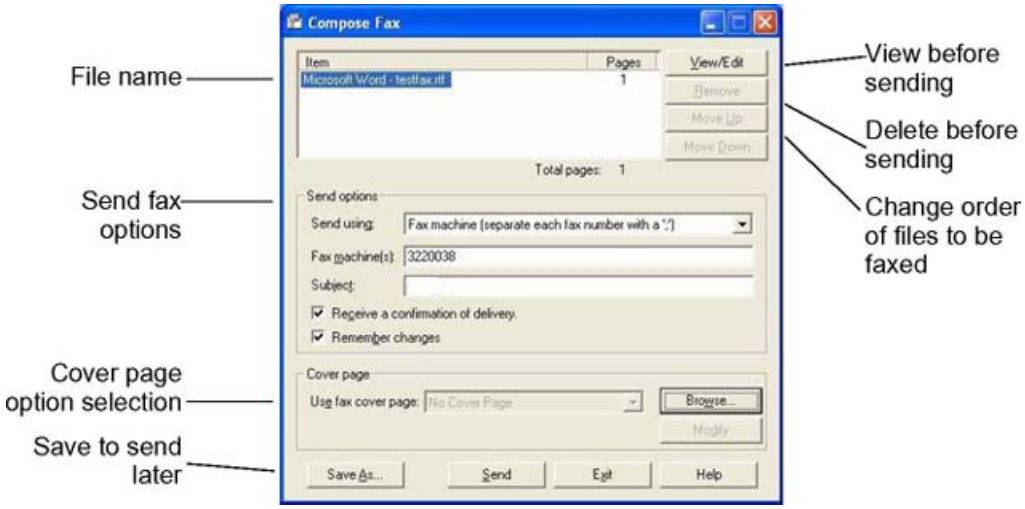
To create and send a single fax message

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

1. Start the application you want to use to create the fax, for example, Microsoft Word. The document you open or create must be no wider than 8.5 in. (21.5 cm).

   Multiple page documents are allowed.
2. When the document is ready, from the File menu, select Print, or whichever option the dialog box to allow you to select a printer.
3. From the list of printers, select Avaya Fax.
4. Click OK or Print, or whichever option sends the file to the printer you selected.

   The Compose Fax dialog box appears.



5. Before sending the fax, you can add more documents by repeating steps 1 to 4. You can also use the options in the Compose Fax dialog box to include a cover page, view the fax, and save the fax as a file for later transmission.
6. Select an appropriate Send using option.
   - To send a simple fax, type the fax machine numbers, or CallPilot mailbox number (append the letter "m" to the CallPilot mailbox number, for example, m7366), in the Fax machine(s) box, type a subject in the Subject text box, and then click Send.
   - To send your fax as an attachment to a new CallPilot message, select CallPilot Desktop Messaging for Microsoft Outlook under Send using, and then click Send.

     A new message form with appears with your fax file attached.
7. Address the message from CallPilot, e-mail, or any Address Book. See Addressing messages on page 40.
8. Add a subject line, attachments and options if required. See Adding attachments to messages on page 36, and Setting message options on page 37.
9. Click the Send Message icon.

To create and send a text message

1. In your inbox, click the New CallPilot Message icon on the toolbar.
2. Click the New Text Message icon in the toolbar.

3. Type or paste plain text into the message.
4. Address the message and add a subject.
5. Click the Send Message icon.

Creating and sending fax batch messages

To send customized CallPilot fax messages to multiple recipients, you can use Microsoft Word Mail Merge, and send your print job to the Avaya Fax Batch printer. You must be familiar with Microsoft Word Mail Merge functionality to use this feature. Consult your Microsoft Word documentation. Note that the CallPilot Fax Batch feature is available only to CallPilot Desktop and web users who install the Avaya Fax batch print driver.

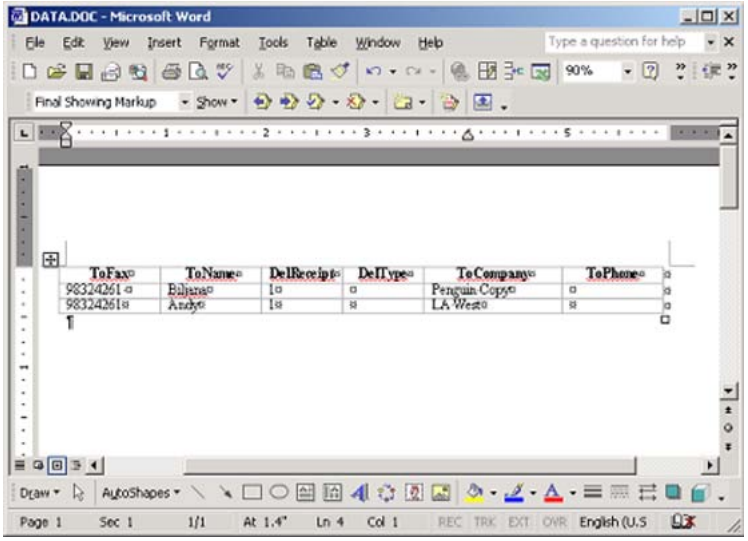
To use Mail Merge with CallPilot, you need a main document (the file you want to send to your recipients) and a data source document that contains recipient information, such as names and fax numbers.

Your CallPilot Desktop Messaging installation includes a sample Microsoft Word data source document named Data.doc and, a sample Microsoft Word main document named Sample.doc.

Accessing and modifying the sample data source document

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

1. Go to \Program Files\Avaya\CallPilot\fax directory, and open the Data.doc file.



2. Add new columns or subtract existing ones, as required. For new columns, chose a meaningful column header name.
3. Add the required data under each column header. The data source can be created by any means available to populate a Microsoft Word table, including importing information from existing files.

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

   The following parameters and characters are supported in the ToFax text box:

   - Maximum supported length for the fax phone number is 120 characters.
   - Numbers 0 through 9 are supported.
   - Use uppercase and lowercase P and the comma when a pause is necessary.
   - The pound sign (#) is supported.
   - Common phone number symbols such as left and right parentheses and the dash, are supported.
   - Spaces are supported.
   - When placed before a CallPilot mailbox number, to designate the mailbox address, the M is not case-sensitive.

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

- ToName: This is the fax recipient's name, and can be up to 256 characters in length.
- DelReceipt: You can use this tag to receive a Delivery Receipt in the form of a CallPilot message in your CallPilot mailbox, when the fax is delivered to the recipient. If the DelReceipt text box is set to 1, and then a delivery receipt is generated. If DelReceipt is set to 0, a delivery receipt is not generated for that recipient. If the DelReceipt text box is empty, or the field is not in Data.doc, and then no delivery receipt is generated.
- DelType: This text box is used to set a delivery priority for each recipient. If the DelType text box is set to 0 or is left empty (or if DelType Text Box is not present in your Data.doc), the message is tagged for Normal delivery. If DelType is set to 1, and then the message is tagged for Economy delivery. If DelType is set to 2, and then the message is tagged for Urgent delivery. Messages sent to non-CallPilot recipients with the Delivery Type set to Economy is delivered on a schedule defined by the CallPilot server for Economy delivery. Note that messages sent to CallPilot mailboxes are not affected by the Economy designation, and is sent as Normal messages. Transmission of messages tagged as Normal or Urgent begin immediately. The Urgent icon is displayed from My CallPilot or a Desktop Messaging client and a voice prompt identifies the message as Urgent from the CallPilot telephone interface. Messages sent Urgent are treated as Normal when they are sent to non-CallPilot addresses.

4. When you have updated the table, save all changes. You normally supply a unique name for your data file here; however, for the remainder of these procedures, the name Data.doc is used.
5. Close the document. You can now use the Data.doc file as a data source by Microsoft Mail Merge.

Accessing and modifying the sample main document

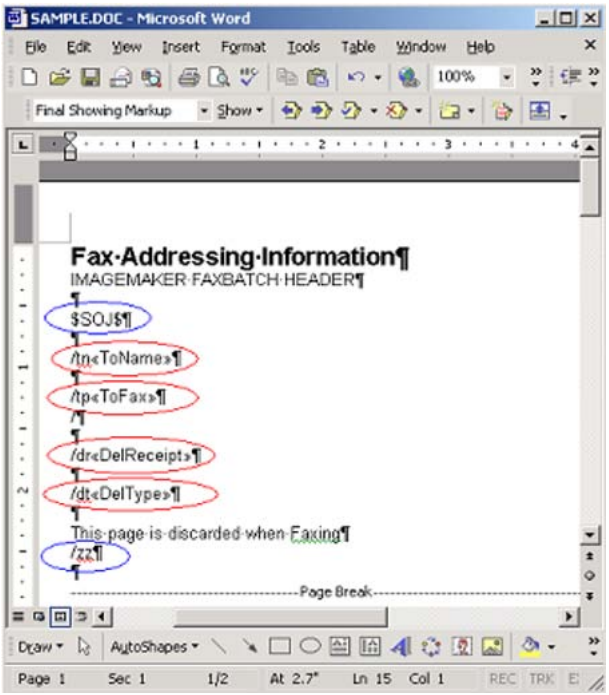
The Sample.doc file is an example of a Microsoft Word main document.

From the \Program Files\Avaya\CallPilot\fax directory, open Sample.doc in Microsoft Word.

This document contains tagged fields corresponding to those in the example Data.doc file. You can use the example Data.doc as a template for your own fax, or for practice purposes. If you modify the column header names in Data.doc, you must modify them in your main document as well.

First page

The first page of the main document is a special page, and does not become part of the final fax. Sample.doc is installed with the first page set up correctly.



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

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

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

/tp	Fax Number, is used to address the message. This text box is required.
/dr	Delivery Receipt, is turned on or off for each recipient. This text box is optional.

/tn	Name of Recipient, is used to identify the record in the Avaya FaxBatch Status dialog if the fax number is either missing or invalid.This text box is optional.
/dt	Delivery Type, is used to mark messages for Normal, Economy or Urgent delivery. This text box is optional.

To complete the page, the Fax Number column header (that is, <<ToFax>>) must be inserted after the /tp control using the Mail Merge insert function. Also, the Delivery Receipt column header (that is, <<DelReceipt>>) can be inserted after the /dr control, the Name of Recipient text box (that is, <<ToName>>) can be inserted after the /tn control, and the Delivery Type text box (that is, <<DelType>>) can be inserted after the /dt control.

Note:

All fax batch controls are case-sensitive.

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

Example

/tp9<<ToFax>>

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

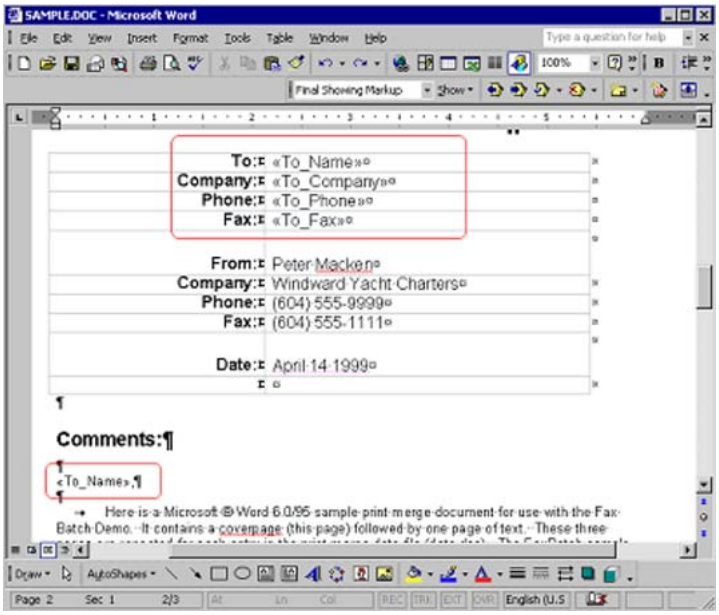
Second page

When the data source document and the first page of the main document are created, you can customize your fax.

Note:

The page must be equal to, or less than, 8.5 inches in width.

You can use all of the data source column header tags to customize the document. The following is an example using the Sample.doc file:



In this example, the document is customized for each recipient. Data source column headers are inserted into the document using the Microsoft Word Mail Merge utility. After the main document is customized, the document is ready to be merged with the information in the Data.doc file. Consult your Microsoft Word Mail Merge help for more details on inserting data source fields into the document.

Merging data from the data source document into the main document

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

1. Start Mail Merge from the Microsoft Word Tools menu. Depending on which version of Microsoft Word you are using, Mail Merge is located under different menu headings.
    a. In Office XP, select Tools > Letters and Mailings> Mail Merge Wizard.
    b. In Office 2000, select Tools > Mail Merge.
    c. In Office 2007, select Mailings > Start Mail Merge > Step by Step Mail Merge Wizard.
2. Verify that Sample.doc is currently selected as the main document, and that Data.doc is currently selected as the data source.
3. Select Merge to Printer, and then select the Avaya Fax Batch driver from the Print dialog box that appears.

Note:
Ensure that Microsoft Word is not set up to print pages in reverse order.

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

When the document is merged, data values from the data source file are merged into the main document at the appropriate tag positions, and a separate fax TIF file for each recipient is created. The CallPilot software addresses and transfer the fax files to the server. The CallPilot server sends the fax to the recipients.

After the process starts, the Print Status dialog box appears. The page number increases incrementally as each page is converted to a TIF file. Because the first page is skipped, this page is not included in the count. For example, if a three-page fax is sent to ten recipients, the dialog box displays Printing page 1, Printing page 2, and continues up to Printing page 20. Only 20 pages are printed, because the first page of each document is skipped.

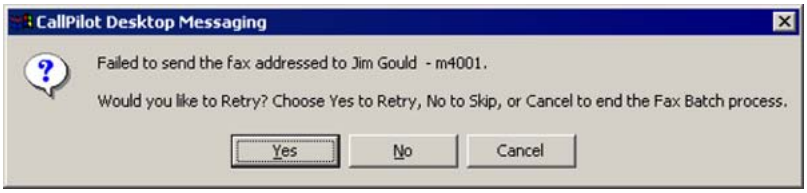
Problems that occur while creating the fax images, or with the fax addresses, are displayed in a separate Avaya Fax Batch Status dialog box:

Problems, such as a missing fax address or an unsupported fax address format, are checked; however, problems such as a wrong fax number are not identified, provided the number is in a valid format. A wrong fax number, however, results in the sending of a non-delivery notification to the user's CallPilot mailbox.

When you click OK, the batch process ends, and no faxes are sent. You must fix the fax addresses, and resubmit the job.

If all faxes and addresses are created properly, a dialog box appears while the faxes are being addressed and transferred to the CallPilot server. The Avaya Fax Batch Status dialog box indicates the status of the batch job. If you click Cancel in this dialog box before the job is completed, another dialog box appears, asking you to confirm the cancellation. If you select Yes, all temporary files are deleted, and the process ends; however, all faxes that are already transferred to the CallPilot server are sent.

If a problem occurs while transferring the fax, a dialog box similar to the following appears:



If you select Yes, an attempt is made to resend the fax to the server. If you select No, the current fax is skipped, and processing begins on the next fax in the list. The skipped fax is not sent. If you select Cancel, another dialog box appears, asking you to confirm the cancellation. If you choose Yes, all temporary files are deleted, and the process ends. Any faxes already transferred to the CallPilot server are sent. If you choose No, the preceding failure dialog box is displayed again, allowing you to make a different choice.

A confirmation dialog box appears after all faxes are submitted to the server.

Using custom fax cover pages

You can choose to include a cover page with your faxes. The server administrator typically designs and manages these cover pages. You can choose the desired style of cover page (if more than one is available).

Cover pages created with these tools include the following information:

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

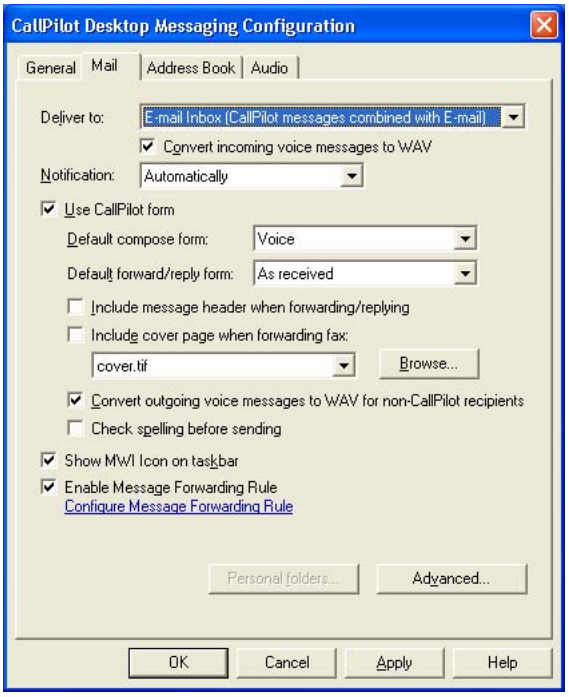
Number of Pages

Sent Date & Time

A Cover Sheet Memo section

Including a cover page in a fax message

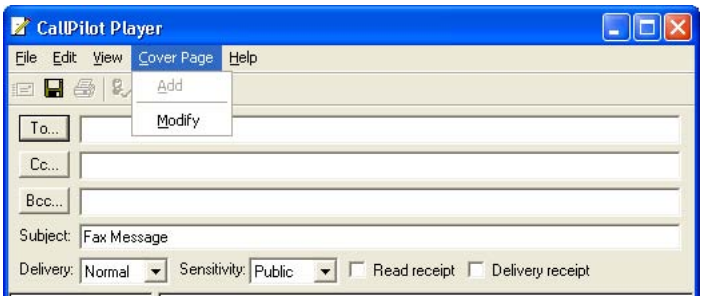
On the Mail tab of the CallPilot Desktop Messaging Configuration dialog box (go to Tools > CallPilot Desktop Messaging > Configuration), there is an option labeled Include cover page when forwarding fax. By default, this option is cleared.



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

Selecting the cover page you want to include

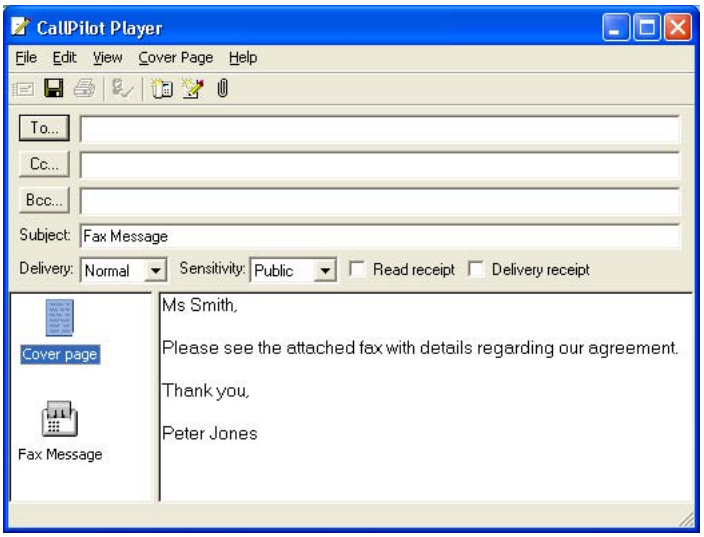
In the CallPilot fax message form, when you are sending a fax message, there is a Cover Page menu with options to Add and Modify.



The Add menu displays a list of existing cover pages available to use. Select one, and then click OK.

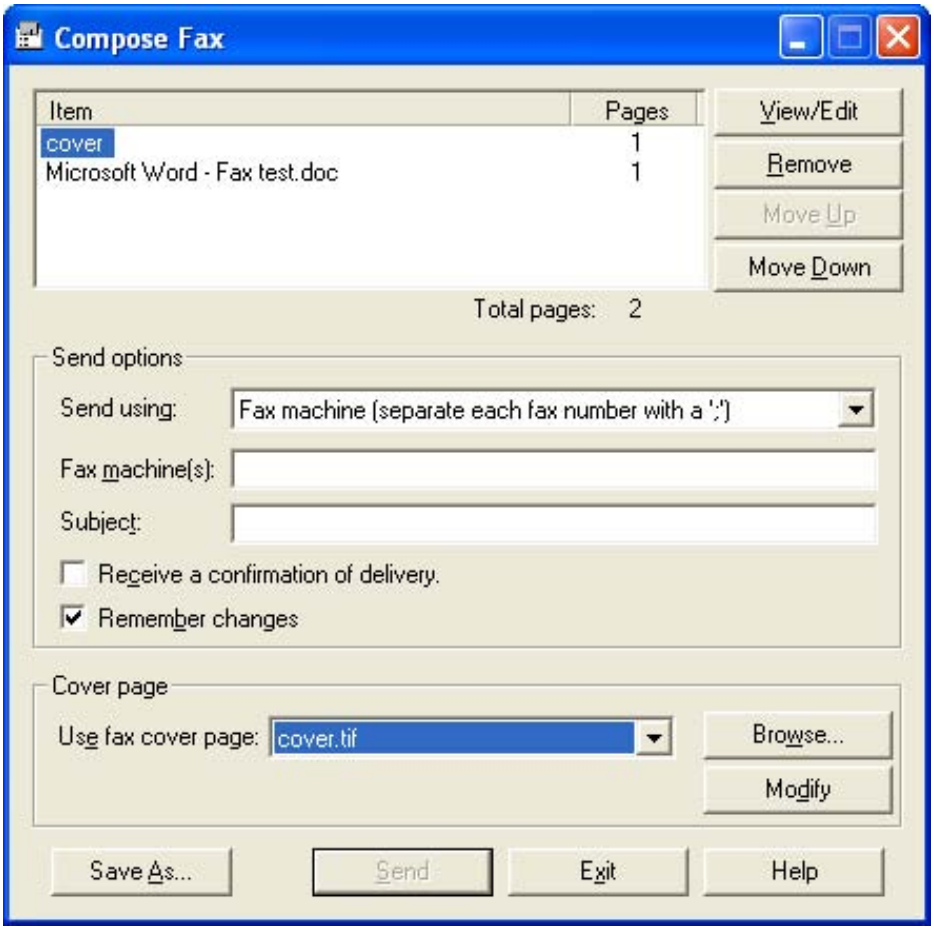
The Modify menu displays the current cover page content and allows you modify it. From the Modify window, you can also preview the current cover page.

If you enable the Include cover page when forwarding fax option, CallPilot adds the selected cover page to the fax. The cover page appears as the first attachment on the list of attachments (left pane). The Attachment view (right pane) contains only the Cover Sheet Memo section of the cover page. You can include any additional required information here.



Avaya Fax printer driver form

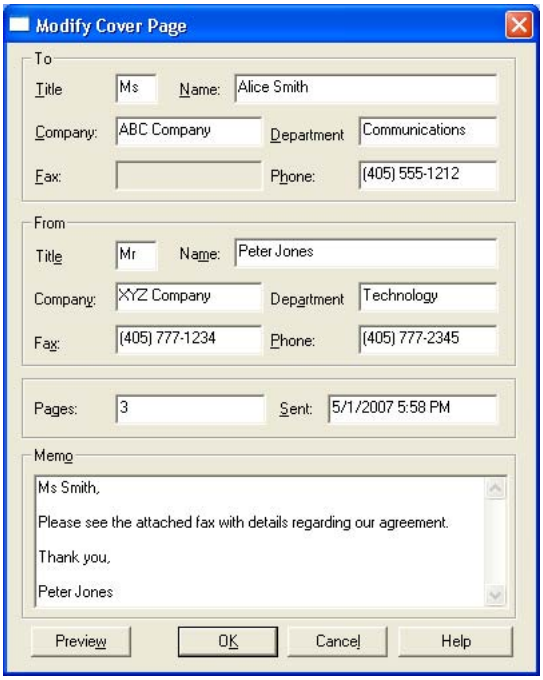
You can use the Avaya Fax printer driver form to send a fax message, using either a CallPilot Desktop Messaging client (such as Microsoft Outlook) or the QuickFax feature. QuickFax allows you to send a fax directly from the Print dialog box. If you choose to send your fax using a CallPilot Desktop Messaging client, the cover page is available from the CallPilot Custom form.



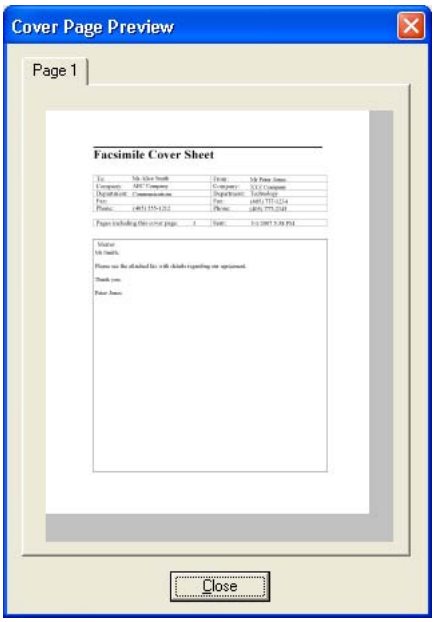
If you choose to send your fax to a specific destination (for example, a fax machine), the Cover page text box becomes active and you can browse and choose a cover page or select one from the list. You can then modify the cover page contents. You can also choose not to include a cover page by selecting the No Cover Page option from the list. Note that you can also include a subject line in the Subject box. The subject line information appears in the e-mail portion of the fax, but not on the hard copy of the fax.

Modifying and previewing a cover page

You can preview the current cover page, and modify its contents, from both the CallPilot Custom form and the Avaya Fax printer driver application.



Click Preview to view the current state of the cover page.



The first time you access this page, CallPilot Desktop Messaging attempts to fill in the From section based on data you entered previously. Although the From information is filled, you can change it.

In the To section, the Fax text box is always read-only. The Name text box is read-only if the cover page is filled using the Custom form. In this case, CallPilot automatically fills the Name text box using the recipient's name. If you use the Fax Printer driver, this text box is left empty, and you can complete it.

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

The Sent box uses the current time and date by default. This box is also editable. The Memo section is synchronized with the Memo section of the Custom form.

Note:

The maximum length of the Memo text box is 2500 characters. The maximum length of the To Name and From Name text boxes is 256 characters. The maximum length of the To Fax and From Fax text boxes is 120 characters. The maximum length of the other cover page text boxes is 30 characters.

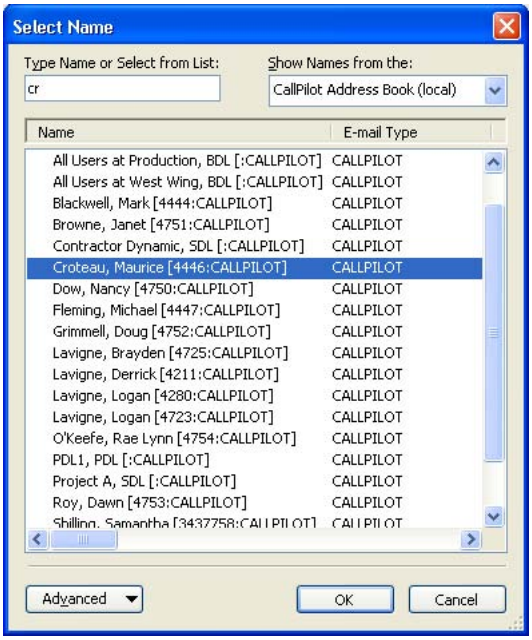
Initiating a call using Call Directory

Using the Call Directory feature, you can call any person listed in any address book available to Microsoft Outlook. This includes the Global Address List, Outlook Contacts, and the CallPilot Address Book.

To initiate a call using Call Directory

1. In your inbox, click the Call Directory button.

   The Select Name dialog box appears.



2. From the Show Names from the list, choose the address book you want to search.

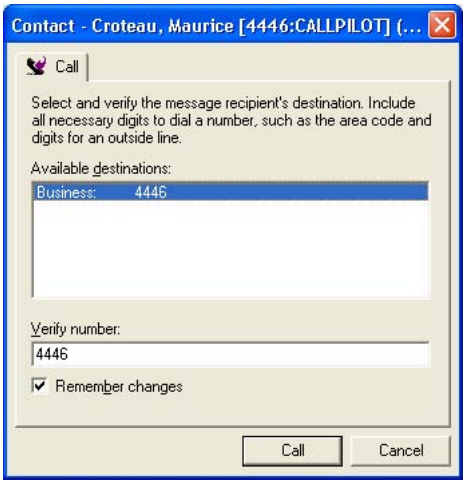
   Note:
   In Outlook 2007, this list is labeled Address Book.

3. In the Type Name or Select from List box, you can type part of or all of the person's name to locate it in the address book, as shown in the previous illustration.

   Note:
   In Outlook 2007, this box is labeled Search.

4. From the Name list, select the person's name, and then click OK.

   The Contact dialog box appears, listing any telephone numbers contained in the address book entry of the person you selected.



Note:

If CallPilot cannot find any valid telephone numbers, then, depending on the client, only the person's e-mail address or name appears. Because the e-mail address or name cannot be dialed, you must manually type the person's complete telephone number in the Verify number box. If you want to save the number you type, select the Remember changes check box.

5. In the Available destinations box, select the number you want to call.
6. Verify that the number is correct, and then click Call.
7. Answer the telephone when it rings. CallPilot immediately calls the sender of the message.

Contacting the sender of a message

You can respond to a CallPilot message or an Microsoft Outlook message with a telephone call instead of a recorded message.

- When the sender of a message originates from within a Microsoft Exchange Server, the address is known, because the address is listed in your address book.
- When the sender of a message originates from an external SMTP server, the sender appears as Unknown in your inbox and CallPilot form, regardless of whether the sender is listed in your address book.

To contact the sender of a message when the address is known

1. Select a message in your CallPilot or Microsoft Outlook inbox.
2. Click the Contact Sender button.

   The Contact dialog box appears, listing any telephone numbers contained in the address book entry for the sender.

   Note:
   If CallPilot cannot find any valid telephone numbers, then, depending on the client, only the person's e-mail address or name appears. Because the e-mail address or name cannot be dialed, you must manually type the person's complete telephone number in the Verify number box. If you want to save the number you type, select the Remember changes check box.
3. In the Available destinations box, select the number you want to call.
4. Verify that the number is correct, and then click Call.
5. Answer the telephone when it rings. CallPilot immediately calls the sender of the message.

Adding attachments to messages

Before you send a message, you can attach one or more voice, fax, or text files to it. Voice files can be VBK or WAV format for CallPilot recipients; CallPilot can automatically convert VBK files to WAV files when sending to non-CallPilot users. See Changing mail delivery settings on page 59. Fax files must be TIFF-F format. Text files must be TXT format.

To attach a file to a message

1. In a new CallPilot message, click the Attach File icon.

2. In the Open dialog box, navigate to and select the file that you want to attach.
3. Click Open to attach the files, and to return to the new CallPilot message.

Setting message options

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

To set message options

1. On a new message form, select Delivery, Sensitivity, Read receipt, and Delivery receipt options, as required.

   - For Delivery, select Urgent or Economy, or leave the setting as Normal.
   - For Sensitivity, select Private, or leave the setting as Public.

     Note that when you send a message marked Private, recipients can still forward the message to someone else, if they are not a CallPilot users. Also, recipients in non-CallPilot systems are not informed of Private settings. In your message, tell the recipients that the message is Private.
   - For Receipt acknowledgment, check Read receipt to request acknowledgment that recipients opened the message. Check Delivery receipt to request acknowledgment that recipients received the message.
2. Continue to compose, address, and send the message as usual.

Forwarding and replying to messages

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

To forward or reply to a message

1. In an open message, click the Reply, Reply To All, or Forward Message icon.

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

Note:
Your administrator can block messages forwarded to external e-mail addresses.

Setting up message forwarding

You can forward your CallPilot messages to another CallPilot mailbox or to an external e-mail address. To do this, you must create and enable a message forwarding rule, which is a set of criteria defining which messages to forward and where to forward them.

When you enable a message forwarding rule, you can then access all incoming messages that meet the criteria from another location, such as an Internet mailbox or a Personal Digital Assistant (PDA). Voice messages can be forwarded in the format in which they are received or converted to WAV.

Either you or your CallPilot administrator can create a message forwarding rule. To create it yourself, you must use My CallPilot; however, you can enable and disable it through either Desktop Messaging, My CallPilot, or using your telephone (option 8-5-1).

To set up message forwarding

1. In your e-mail inbox, on the Tools menu, choose CallPilot Desktop Messaging > Configuration.
2. Click the Mail tab.
3. To open My CallPilot, click the Configure Message Forwarding Rule item.
4. If the Message Forwarding Rule Configuration page of My CallPilot does not appear automatically:
    a. Log on to My CallPilot.
    b. Click the CallPilot Features tab, and then click the Message Forwarding Rule item.
5. Configure a message forwarding rule. For step-by-step instructions, refer to the Desktop Messaging User Guide for My CallPilot (NN44200-109).

To enable or disable message forwarding

A message forwarding rule must be configured before you can enable or disable it. See the preceding procedure if you want to configure it yourself, or ask your CallPilot administrator to configure one for you. For security reasons, you must enable and disable it yourself. You can do this in My CallPilot, in Desktop Messaging using the following procedure, or you can use the telephone (option 8-5-1).

Note:

If you have the Anonymous Logon option turned on, you cannot enable or disable a message forwarding rule using the Desktop Messaging software. (To check, go to Tools > CallPilot Desktop Messaging > Configuration, click the Address Book tab, and then click Advanced).

1. In your e-mail inbox, on the Tools menu, choose CallPilot Desktop Messaging > Configuration.
2. Click the Mail tab.
3. Select or clear the Enable Message Forwarding Rule check box.

Addressing messages

You can address a CallPilot message using the CallPilot Address Book, or you can select addresses from any available address book in Outlook. You can also manually address a message.

Your organization maintains the CallPilot Address Book on the server, and it contains the addresses of the CallPilot users and distribution lists that you are allowed to use. You cannot edit this list. If you work offline (without a connection to the CallPilot server), you can download the CallPilot Address Book to your computer. For more information, see Changing your Address Book settings on page 61.

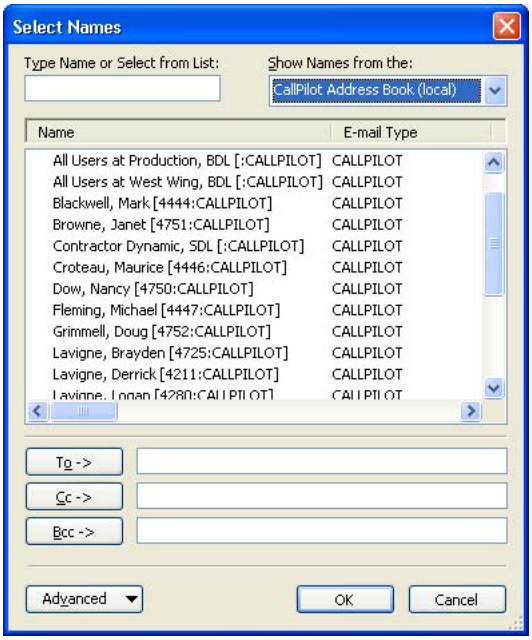
Accessing CallPilot addresses from other networked CallPilot servers

If your site has more than one CallPilot server, your CallPilot administrator can expand your CallPilot Address Book to include the addresses of CallPilot users on networked servers, in addition to addresses on your local server. If you do not need this expanded list, you can configure your CallPilot Address Book to include only addresses from your local server. For more information, see Changing your Address Book settings on page 61.

To address a message from an address book

1. In a new CallPilot message, click To.
2. In the Show names from the list, select the address book you want to use, for example, CallPilot Address Book.

   Note:
   In Outlook 2007, this list is labeled Address Book.



3. In the Type Name or Select from List box, you can type part of or all of the person's name to locate it in the address book.

   Note:
   In Outlook 2007, this box is labeled Search.

4. Select the address.
5. Click To.
6. If required, select additional addresses, and then click To, Cc, or Bcc.
7. When you finish selecting addresses, click OK to return to the CallPilot message.

To address a message manually

In a new CallPilot message, type the address directly into the To box. Enclose the address in square brackets.

Example of correct manual address format

[CALLPILOT:19055551212@na12345.us.avaya.com]

For details about correct addressing formats, see Required format for a CallPilot e-mail address on page 45 or Required format for fax and telephone Numbers on page 46.

To add CallPilot addresses to your Outlook Contacts

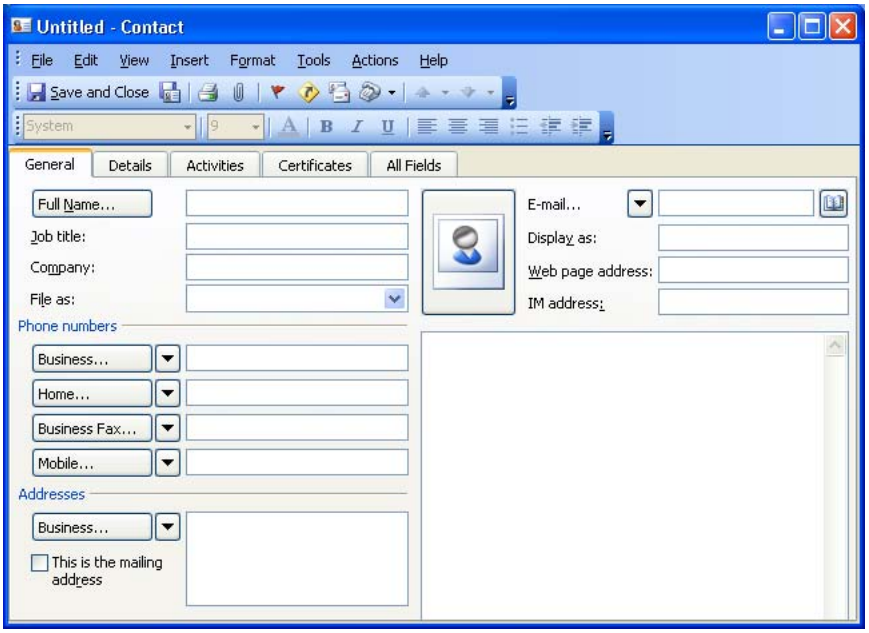
You can add CallPilot addresses to your Outlook Contacts. You can choose to distinguish between CallPilot addresses and regular e-mail addresses by adding the word CallPilot after the recipient's name.

1. In Microsoft Outlook, open the Address Book.
2. Click the New Entry icon.

   Note:
   In Outlook 2007, click File > New Entry.

3. Click New Contact, and then click OK.

   The Untitled - Contact dialog box appears. The following example is from Outlook 2003.



4. Complete the dialog box as required, keeping the following in mind:

   • CallPilot uses information from these fields:

   - E-mail addresses: E-mail, E-mail 2, E-mail 3

- Telephone numbers: Assistant, Business, Business 2, Car, Home, Home 2, ISDN, Mobile, Other
- Fax numbers: Business Fax, Home Fax, Other Fax

For more information about formats, see Required format for a CallPilot e-mail address on page 45, or Required format for fax and telephone Numbers on page 46.

- CallPilot ignores all fax and telephone numbers if the E-mail box contains a Microsoft Exchange Server or CallPilot address.

E-mail addresses versus fax/telephone numbers

CallPilot searches contact information for either a CallPilot address or Microsoft Exchange Server address. If neither is available, the address or number CallPilot uses depends on whether the message is a voice, fax, text, or mixed format message.

Message type	Address or number used
Voice	• If both an e-mail address and a telephone number are available, CallPilot prompts you to choose one. • If only an e-mail address is available, CallPilot sends the message to that address. • If only a telephone number is available, a dialog box prompts you to verify the number, and then CallPilot sends the voice message to that number.
Fax	• If both an e-mail address and a fax number are available, CallPilot prompts you to choose one. • If only an e-mail address is available, CallPilot sends the message to that address. • If only a fax number is available, a dialog box prompts you to verify the number, and then CallPilot sends the message to that number.
Text	CallPilot sends the message to an e-mail address, if available.
Mixed voice/fax or voice/text	CallPilot sends the message to an e-mail address, if available.

Note:

In cases where no appropriate address or number is available, CallPilot sends you a non-delivery notification to let you know it cannot send the message.

Verifying telephone and fax numbers

The original telephone or fax number can contain any alphanumeric character. This includes special dialing prefixes, such as + for international numbers, or abbreviations, such as ESN to denote internal calls. However, you must modify the selected number in the Verify number text box of the CallPilot Recipient dialog box to ensure proper delivery. The modified number can contain only the following alphanumeric characters:

Example

Numeric characters 0123456789

Numeric delimiters ( ) -

Pause characters Pp,

Pound #

White space

The Desktop Messaging software attempts to remember changes you make so that you do not have to re-enter them each time the same telephone or fax number is used.

Note that the ability to dial any telephone or fax number can be restricted by the CallPilot server.

Note also that the ability to scan for telephone or fax numbers is available only when you use the CallPilot message form. The standard e-mail form does not scan for these numbers. If a CallPilot or e-mail address is missing from a recipient text box in the standard e-mail form, an non-delivery notification is generated for that recipient.

To add a sender or recipient to your Outlook Contacts

You can quickly add a sender or recipient to your Outlook Contacts using a shortcut menu. If a sender or recipient of a CallPilot message is not in your Outlook Contacts, the display name appears as Unknown.

1. In an open CallPilot message, right-click the sender or recipient that you want to add to your Outlook Contacts.
2. Click Add to Contacts.
3. Type the person's name and any additional information that you want to keep track of.
4. Click Save and Close.

The new contact is added to your contact list.

To update the existing contact information of a sender or recipient

If you want to change contact information for someone who is already in your Outlook Contacts, you can quickly do so in an open message using a shortcut menu.

1. In an open CallPilot message, right-click the sender or recipient that you want to update in Outlook Contacts.
2. Click Update Existing Contact.
3. From the list of available contacts, click the correct name, and then click OK.
4. Make any changes to the contact information.
5. Click Save and Close.
6. In the Duplicate Contact Detected dialog box, choose what you want to do with the duplicate contact information, and then click OK.

Required format for a CallPilot e-mail address

If you choose to enter a CallPilot address in the E-mail text box, enter the address in the following format:

Example

[CALLPILOT:XXXXYYYY@ZZZZ]

Where: XXXX = VPIM network shortcut YYYY = CallPilot Mailbox number ZZZZ = CallPilot Server FQDN (server and domain)

For example, suppose CallPilot server na12345 in the domain us.avaya.com with VPIM network shortcut 1905555 contains mailbox 1212. Then the CallPilot address for that mailbox is:

Example

[CALLPILOT:19055551212@na12345.us.avaya.com]

Required format for fax and telephone Numbers

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

The required format for fax is:

[CALLPILOT:FAX=XXXX@ZZZZ]

The required format for voice is:

[CALLPILOT:VOICE=XXXX@ZZZZ]

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

Examples of valid fax and telephone number formats are:

[CALLPILOT:1212@na12345.us.avaya.com] [CALLPILOT:(416) 897-6666@na12345.us.avaya.com] [CALLPILOT:(416) 897-6666,1212@na12345.us.avaya.com] [CALLPILOT:(416) 897-6666p1212@na12345.us.avaya.com] [CALLPILOT:(800) 333-7777#123123@na12345.us.avaya.com]

Microsoft Outlook supports telephone and fax contact numbers for business, home, car, and so on. Some contact numbers are not supported. Note that contact numbers are a feature of Microsoft Outlook; CallPilot Desktop Messaging cannot hide or alter unsupported items. The supported and unsupported numbers are shown as follows:

- Valid voice contact numbers: Assistant; Business; Business 2; Car; Home; Home 2; ISDN; Mobile; Other
- Valid fax contact numbers: Business fax; Home fax; Other fax
- Unsupported Contact Numbers: Callback; Company; Pager; Primary; Radio; Telex; and, TTY/TDD

Personal distribution lists

There are two types of personal distribution lists (PDL) you can use:

- A CallPilot personal distribution list, which can be created using My CallPilot or the telephone.
- Local distribution lists, which can be created from Outlook Contacts. Note that this type is not accessible from the telephone.

To use existing CallPilot personal distribution lists

You can address messages using CallPilot personal distribution lists that you create in My CallPilot or on your telephone. In Outlook, select these lists from the CallPilot Address Book.

To create a personal distribution list in Outlook

You create a CallPilot personal distribution list in Outlook the same way that you create an e-mail personal distribution list. When you create a list, it appears in your Outlook Contacts so that you can select the list to address a message. You cannot access a list created in Outlook from your telephone or from My CallPilot.

For information about creating a personal distribution list in Outlook, see the Outlook online Help.

Changing the inbox to which your CallPilot messages are delivered

You can choose to have your CallPilot messages delivered to either

- a separate CallPilot inbox, so that your CallPilot messages are kept separate from your regular Outlook e-mail
- your e-mail inbox, so that your CallPilot messages are combined with your regular Outlook e-mail

Compare the following two illustrations to understand the two options.

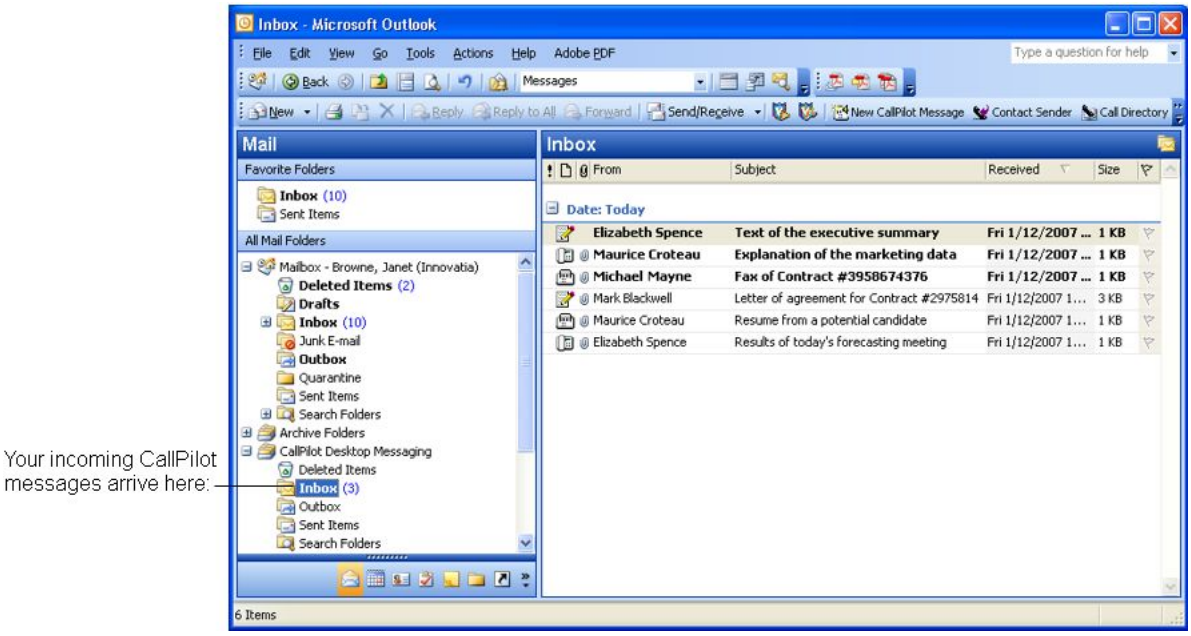


Figure 1: CallPilot messages in a separate inbox

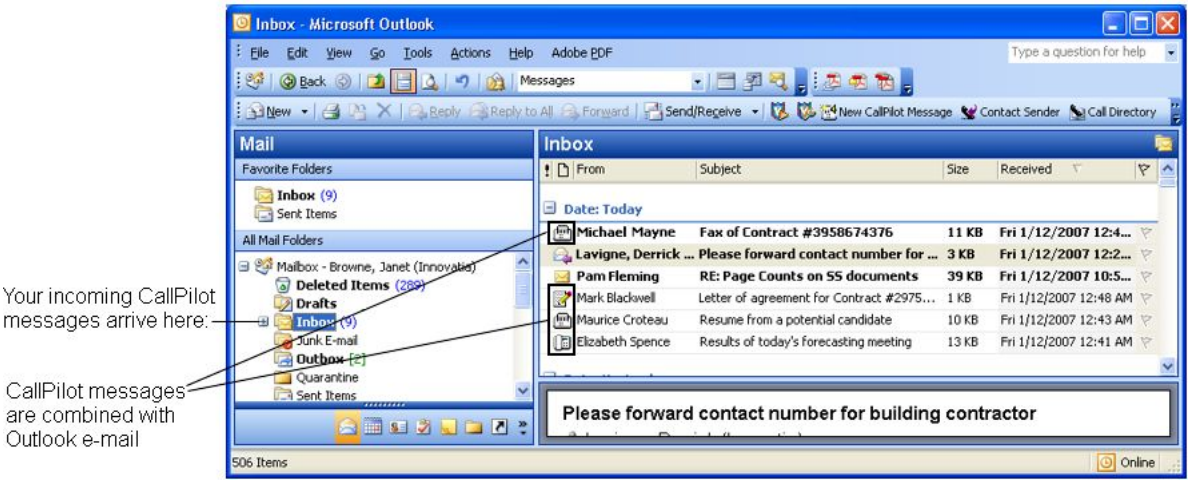


Figure 2: CallPilot messages in your Outlook inbox, combined with regular e-mail

When you log on to Desktop Messaging for the first time, the software prompts you to choose your inbox if this option is available to you; however, you can change your inbox location at any time using the following procedure.

To change the inbox to which CallPilot messages are delivered

1. In your inbox, from the Tools menu, choose CallPilot Desktop Messaging > Configuration.
2. Click the Mail tab.
3. From the Deliver to list, select the inbox to which you want your CallPilot messages delivered.

4. If you chose E-mail Inbox, and if you want to listen to voice messages from Outlook Web Access with non-Avaya media players, select the Convert incoming voice messages to WAV check box.
5. Click OK.
6. Close and then reopen Outlook so that the changes take effect.

About combining CallPilot messages with Outlook e-mail

Here are some tips about combining CallPilot messages with Outlook e-mail:

- If your Outlook e-mail inbox resides on the Microsoft Exchange Server, you can take advantage of some additional Outlook features, such as
  - receiving notification of CallPilot messages on a Blackberry device
  - using the Outlook Rules Wizard to manage your CallPilot messages
  - viewing CallPilot messages in Web-based e-mail clients such as Outlook Web Access

  Note:
  The Outlook client must be running for these features to work.
- If you notice a delay in message synchronization (between the CallPilot server and your Microsoft Exchange Server), you can reduce the delay by setting your Microsoft Exchange Server to use Cached Exchange Mode. This stores a copy of your inbox on your computer. For instructions on where to set this option, see the Outlook online Help.

  Note:
  Cached Exchange Mode is available only in Outlook 2003 and later.
- Because you have chosen not to use your CallPilot Desktop Messaging inbox, it is not listed in your mail folders list. In certain cases, it might still appear in the list, but it is disabled.

Using instant messaging

Using the instant messaging feature, you can start an instant messaging session through Microsoft Windows/MSN Messenger and Nortel Multimedia PC Client (MCS 5100) from a CallPilot or e-mail message.

You can initiate an instant messaging connection with other users, provided both parties have a valid account on MCS 5100 (Nortel Multimedia PC Client), or with one of the following services available in Windows/MSN Messenger:

- NET Passport Service (Windows/MSN Messenger)
- SIP Communication Service (Windows Messenger)
- Exchange Instant Messaging Service (Windows Messenger)

There are no special requirements to configure these services. You must configure these accounts according to Windows/MSN Messenger requirements. For the SIP Communication Service on MCS 5100 configuration, you must have a configured and fully-operational Nortel Multimedia PC Client to be able to use its instant messaging functionality.

To activate instant messaging functionality in CallPilot Desktop Messaging

1. In your e-mail inbox, on the Tools menu, choose CallPilot Desktop Messaging > Configuration.
2. On the General tab, select the instant messaging application you want to use. Your choices are:
   - Use Windows/MSN Messenger
   - Use Nortel Multimedia PC Client
3. Close Outlook and then reopen it so that the changes take effect.

To use instant messaging from an open CallPilot message

You can initiate an instant messaging session through in an open CallPilot message.

1. In an open CallPilot message, on the toolbar, click the icon representing the instant messaging software you want to use:

If the message sender is online, an instant message session starts. If not, the Contact dialog box appears.

2. Click the tab for the instant messaging software.

   The tab displays your Contacts list from the Windows/MSN Messenger application, or your Friends list from the Nortel Multimedia PC Client application.

3. Select and verify the instant messaging address, or type the correct sign-in name.
4. Click Send to begin the session.

Note:
The instant messaging icons on the toolbar are different colors, depending on the online status of the sender:

	Online		Offline		Status or sender Sign In name Unknown to Windows/ MSN Messenger
	Online		Offline		Status or sender Sign In name Unknown to Nortel Multimedia PC Client (MCS 5100)

Tool tips for instant messaging icons also show the sender's Sign In name and online status, if this information is available.

Using instant messaging from Microsoft Outlook

1. From your inbox, select an e-mail message.
2. On the Tools menu, choose CallPilot Desktop Messaging > Contact Sender.

   CallPilot retrieves the message sender's CallPilot address, and then the Contact dialog box appears.

3. Click the tab for the instant messaging software.

   The tab displays your Contacts list from the Windows/MSN Messenger application, or your Friends list from the Nortel Multimedia PC Client application.

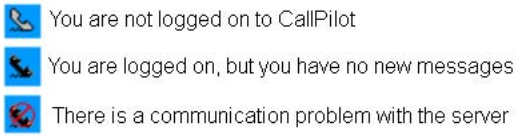
4. Select and verify the instant messaging address, or type the correct sign-in name.
5. Click Send to begin the session.

Using the Message Waiting Indicator

Desktop Messaging includes a Message Waiting Indicator (MWI) that appears as a telephone handset icon in the lower-right corner of your screen, in the Windows taskbar or system tray. The Message Waiting Indicator notifies you if you have new messages and provides you with quick access to your inbox.

A red telephone handset icon indicates that you have new messages:

The appearance of the Message Waiting Indicator icon changes to give you additional information about your connection to the server as follows:



Note:
When using a Geographic Redundant pair of servers, your server information is visible by holding your mouse over the Message Waiting Indicator icon. This tells you if you are connected to the main or alternative server, and provides the IP address of the current server.

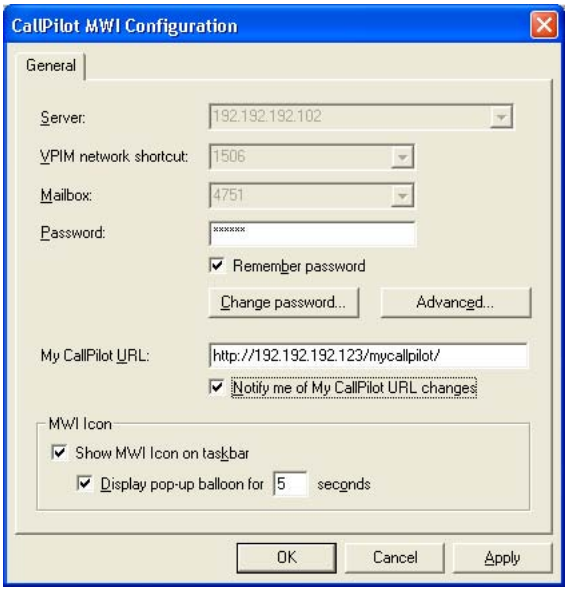
To configure the Message Waiting Indicator

Use the CallPilot MWI Configuration dialog box to

- show or hide the Message Waiting Indicator
- enable and disable its pop-up balloon text
- control how long the balloon text stays on the screen

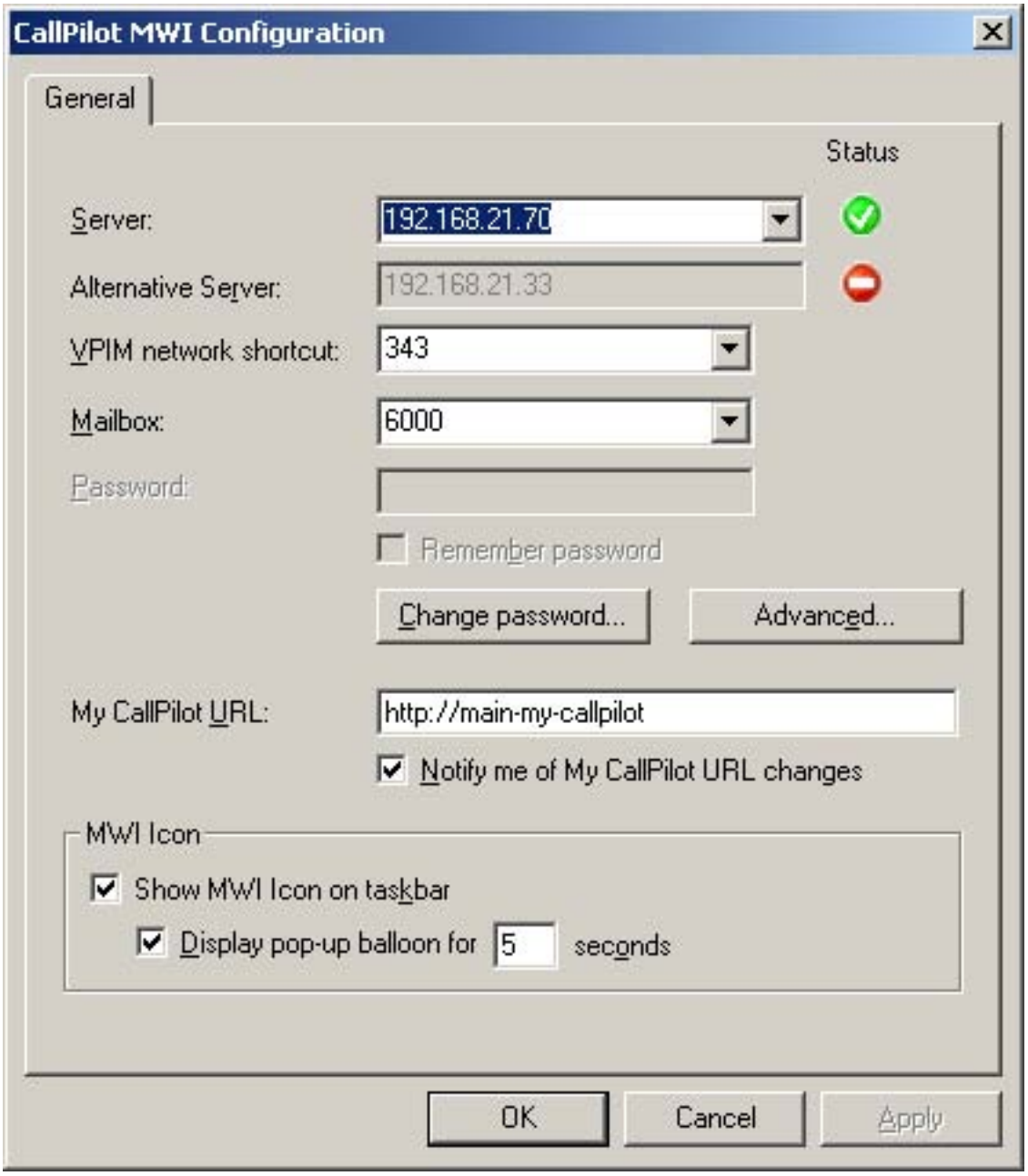
1. In the Windows taskbar, right-click the Message Waiting Indicator icon.
2. Click CallPilot MWI Configuration.

   The CallPilot MWI Configuration dialog box appears.



Note:

The first three boxes (Server, VPIM network shortcut, and Mailbox) are for information only and they appear dimmed; if you want to change information in these boxes, you can access them on the General tab at Tools > CallPilot Desktop Messaging > Configuration.



Note:

The first four boxes (Server, Alternative Server, VPIM network shortcut, and Mailbox) are for information only and they appear dimmed; if you want to change information in these boxes, you can access them on the General tab at Tools > CallPilot Desktop Messaging > Configuration.

Note:

The green circle containing a check mark indicates which server is currently active. If neither server is available, then the minus sign appears next to each

server. The client automatically restores connection to the appropriate server when connectivity becomes available.

Note:

If an alternative server is configured while you are logged in to CallPilot, your alternative server information will only be visible after you have logged out and logged in again.

3. If you want to open My CallPilot and play your latest message by double-clicking the icon, ensure that the My CallPilot URL box contains the correct URL. You must be connected to a CallPilot 5.0 or later server for this to work.

   Ask your CallPilot administrator for the correct URL. Typically, the URL appears in one of the following formats:

   http://prefix.hostname.com/mycallpilot/

   http://IP address/mycallpilot/

4. To show or hide the Message Waiting Indicator icon, select or clear the Show MWI Icon on taskbar check box.

   Note:

   If you hide the icon and then decide you want to show it again, from the Windows Start menu, choose Programs > Avaya > CallPilot MWI Icon. The icon reappears in the taskbar.

5. To enable or disable the balloon text, select or clear the Display pop-up balloon for x seconds check box. You can also change the number of seconds the balloon text appears on the screen.
6. To save your changes, click OK.

To use the Message Waiting Indicator

Here are some helpful tips for using the Message Waiting Indicator:

- To display your mailbox number, the address of the server, and the number of messages waiting in your inbox, position your pointer over the icon.
- Right-click the icon to display a shortcut menu with options to:
  - open My CallPilot (if a URL for My CallPilot is defined in the configuration settings for the Message Waiting Indicator)
  - configure the Message Waiting Indicator
  - log on to or off from your CallPilot mailbox

- exit from the Message Waiting Indicator so it no longer appears

- To open your latest CallPilot message in My CallPilot, double-click the Message Waiting Indicator icon.

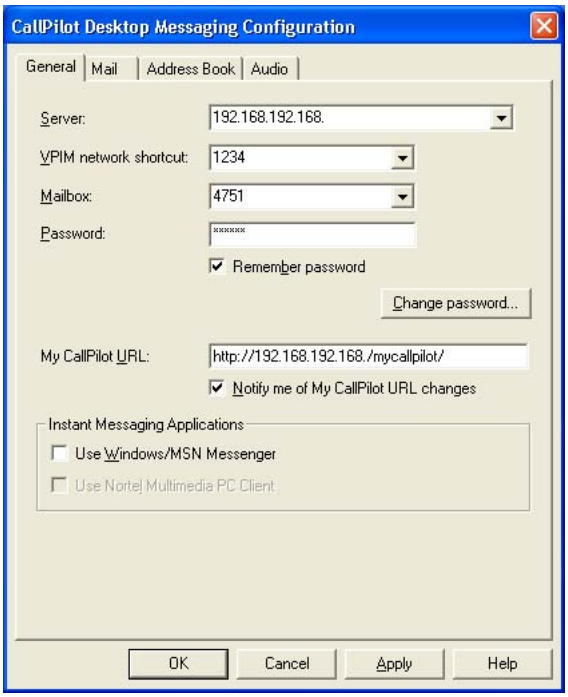
Note:
If this does not work, ensure that the My CallPilot URL box contains the correct URL in the CallPilot MWI Configuration dialog box. To open the dialog box, right-click the Message Waiting Indicator icon, and then click CallPilot MWI Configuration.

Changing your mailbox settings

To view or change your CallPilot access settings

1. In your e-mail inbox, on the Tools menu, choose CallPilot Desktop Messaging > Configuration.

   The General tab displays your current access settings.



2. Make any changes required, and then click OK.

To change your CallPilot password

Note:
You can change a forgotten mailbox password by e-mail or secret question. Contact your administrator for the required link.

Your CallPilot password is the same password that you use from the telephone.

1. Repeat step 1 in the previous procedure, and then click Change Password.
2. In the Old password box, type your current password.
3. In the New password text box, type your new password.
4. In the Retype new text box, type your new password again.
5. Click OK to save the change.
6. Click OK to exit the General settings.

Password change service

Connecting to the password change service web page

1. Access the Password Change Service home page using the link provided by your administrator. (https://<Web server host name or IP address>/cppwdchange/default.asp).
2. Select a CallPilot server name from the predefined list and enter your mailbox number.
3. Click Next. The Password Change Service home page appears.

Modifying password change service settings

1. From the Password Change Service home page, select Modify Password Settings. The Password Change Service login page appears.
2. Enter your mailbox password and click Login. The Password Change Service page appears.

From the Password Change Service you can perform the following actions:

Field	Description
Change Password	Use this section to immediately change your password. See Changing a password on page 58.

Field	Description
Email	Enter the E-mail address you want Password Change Service to use when sending change password E-mails. Click Save Email settings to save your E-mail address.
Questions and Answers	Enter your secret questions and associated answers. These questions must be answered when changing your password using the Secret Question feature. Click Save Q & A Settings to save your questions and answers.

Changing a password

1. From the Password Change Service page, enter a New Password and Confirm New Password.
2. Click Change Password.

Changing a password by email

This procedure is only available if the Change Password Via Email function has been enabled by your administrator. Use this procedure if you have forgotten your password.

1. Access the Password Change Service home page.
2. Click Change Password Via Email. A message appears informing you that an email has been sent to your assigned E-mail address. The link within the E-mail will remain valid for one hour.
3. Click Close.
4. When you receive the E-mail, click the link provided in the body of the E-mail. The Mailbox Password Change page opens.
5. Enter a New Password and Confirm New Password.
6. Click Save. Your password has been changed.

Changing a password by secret question

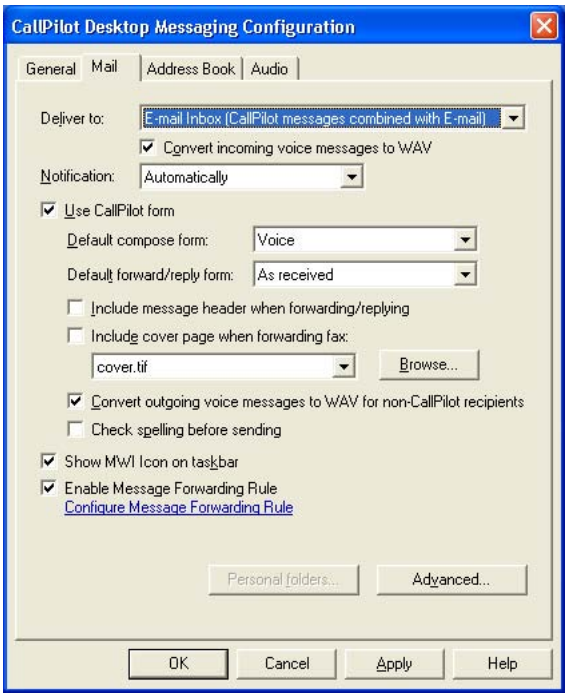
This procedure is only available if the Change Password Via Secret Questions function has been enabled by your administrator. Use this procedure if you have forgotten your password.

1. Access the Password Change Service home page.
2. Click Change Password Via Secret Questions. A page opens showing your previously defined questions.
3. Answer both questions and enter a New Password and Confirm New Password.
4. Click Save. If both answers are correct, a pop-up message informs you that your password has been successfully changed.

Changing mail delivery settings

To view or change your mail settings

1. In your e-mail inbox, on the Tools menu, choose CallPilot Desktop Messaging > Configuration.
2. Click the Mail tab.



3. Make changes to the following settings, as required:
   - Deliver to: Select the inbox to which you want your CallPilot messages delivered. For more information, see Changing the inbox to which your CallPilot messages are delivered on page 47.
   - Convert incoming voice messages to WAV: Select this check box to convert incoming voice messages from the Avaya VBK format to WAV format. You can then listen to voice messages using most non-Avaya media players, in addition to the CallPilot Player. These two file types are similar in size. (This check box is available only if your selection in the Deliver to box is E-mail Inbox.)

- Notification: Choose automatic notification, manual notification, or a timed delay notification. Choose Manually to save costs on long distance or ISDN connections.
- Use CallPilot form: Select this check box to display CallPilot messages using the CallPilot custom form instead of the standard Outlook form. The CallPilot custom form provides one-click playback of CallPilot voice messages.
- Default compose form: Select the default form to display when you create a new CallPilot message.
- Default forward/reply form: Select the default form to display when you forward or reply to a CallPilot message.
- Include message header when forwarding/replying: Select this check box if you want text message headers copied into forwarded messages and replies. If you clear this check box, text message headers do not appear.
- Include cover page when forwarding fax: For information about adding or modifying cover pages, see Including a cover page in a fax message on page 28.
- Convert outgoing voice messages to WAV for non-CallPilot recipients: Select this check box to automatically convert voice messages to WAV format when you send them to non-CallPilot users.
- Check spelling before sending: Select this check box if you want text messages you create using the CallPilot custom form to be automatically spell-checked when you click Send. If you clear this check box, you can still run the spell checker manually. You must have Microsoft Word installed for the spell checker to work.

  Note:

  CallPilot uses the basic spell-checking function provided with Microsoft Word. Some of the advanced spell-checker options do not apply when you spell-check CallPilot messages, for example, the option to ignore Internet and file addresses.

- Show MWI Icon on taskbar: Select this check box to display the Message Waiting Indicator (MWI) on the Windows taskbar. The MWI turns red when you receive new messages and provides status information about your CallPilot mailbox.
- Enable Message Forwarding Rule: Select this check box if you want to enable a message forwarding rule you configured, that is, a rule for forwarding your CallPilot messages to an external e-mail address or a CallPilot inbox. If this check box does not appear, the CallPilot administrator has not granted you privileges to do this, or you have the Anonymous Logon option turned on. If the check box appears dimmed, a message forwarding rule is not configured for you.
- Configure Message Forwarding Rule: Click this link to connect directly to the My CallPilot application and configure settings for forwarding your CallPilot

messages to an external e-mail address or a CallPilot inbox. If this link does not appear, the CallPilot administrator has not granted you privileges to do this.

4. When you finish making changes, click OK.

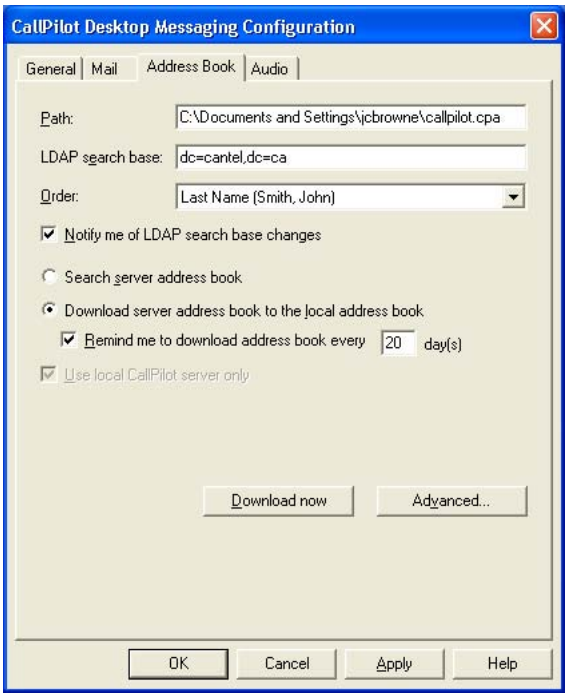
Note:
Some changes may not take effect until you close and reopen Outlook.

Changing your Address Book settings

Your administrator enters the default address book settings for you. You can change the address book settings, if required.

To view or change your address book settings

1. In your e-mail inbox, on the Tools menu, choose CallPilot Desktop Messaging > Configuration.
2. Click the Address Book tab to display the current settings.



3. Make changes to the following options, as required:
   - Path: This is the path of the local CallPilot Address Book.
   - LDAP search base: This is the directory tree root for the part of your company or organization served by the CallPilot server, and should match the directory tree root configured on the server. The LDAP search base must be set correctly to download the CallPilot Address Book. If you do not know the LDAP search base to use, check with your CallPilot administrator.
   - Order: Choose whether names in the CallPilot Address Book are organized by first or last name.
   - Notify me of LDAP search base changes: Select this check box if you want to receive notification when the LDAP search base defined on the CallPilot server changes.
   - Search server address book: Select this option to use the CallPilot Address Book on the network. By accessing the CallPilot Address Book on the network, you ensure that your address information is always up-to-date. You must be connected to the network to use this option.
   - Download server address book to the local address book: Select this option to use the copy of the CallPilot Address Book stored on your computer. If you choose this option, you can access the CallPilot Address Book when you are not connected to the network (working offline). To keep the CallPilot Address Book up-to-date, download it regularly.
   - Remind me to download address book: Select this check box to receive a reminder, and then type the number of days between reminders.
   - Use local CallPilot server only: Select this check box if you want to limit your CallPilot Address Book to include only those addresses on your local CallPilot server. If you clear this check box, your CallPilot Address Book includes addresses from all CallPilot servers on your network, or from a Avaya Common Network Directory set up by your system administrator, depending on your site. If this check box appears dimmed, you are limited to the CallPilot Address Book on the local server.
4. When you finish making changes, click OK.

Note:
Some changes may not take effect until you close and then reopen Outlook.

To log on as an anonymous user

You can log on as an anonymous user.

1. In your e-mail inbox, on the Tools menu, choose CallPilot Desktop Messaging > Configuration.
2. Click the Address Book tab.
3. Click Advanced.
4. Select the Anonymous logon check box.
5. Click OK.

Note:

When you clear the Anonymous logon check box, the Desktop Messaging software also downloads BDLs, SDLs, and user PDLs as part of the Address Book download. When you select the Anonymous logon check box, BDLs, SDLs, and user PDLs are skipped.

To download the Address Book to your computer

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

1. In your e-mail inbox, on the Tools menu, choose CallPilot Desktop Messaging > Configuration.
2. Click the Address Book tab.
3. Select Download server address book to the local address book.
4. Click Download now, and then click OK when a message notifies you that the download is complete.

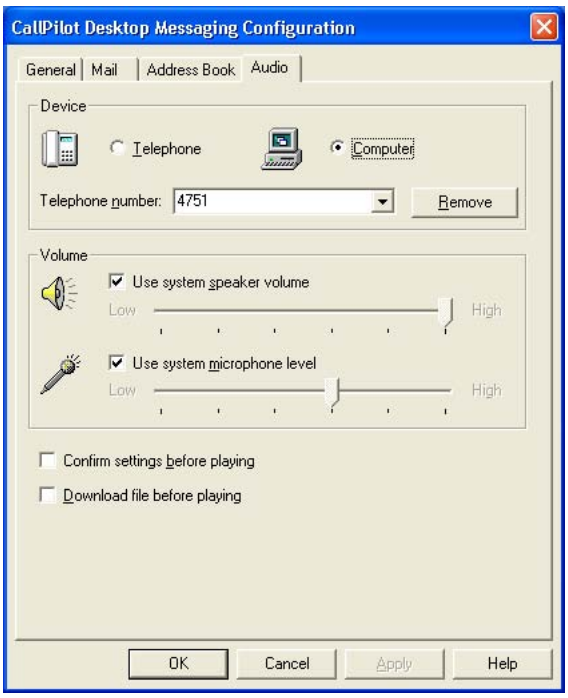
   As a result, when you address a CallPilot message, you are accessing the downloaded CallPilot Address Book, whether you are working online or offline.
5. To ensure you download the CallPilot Address Book regularly, select the Remind me to download address book every check box, and then set the number of days between reminders.
6. Click OK.
7. To ensure your changes take effect, close Outlook and then reopen it.

Changing audio settings

To change the audio device and volume

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

1. In your e-mail inbox, on the Tools menu, choose CallPilot Desktop Messaging > Configuration.
2. Click the Audio tab to display the current audio settings.



3. In the Device section, click Telephone if you want to play and record your voice messages from your telephone. Ensure the correct telephone number appears. Alternatively, click Computer if you want to play and record your voice messages through your computer speakers and microphone.

Note:
You can also change your audio device on the CallPilot Player.

4. In the Volume section, select the Use system speaker volume and Use system microphone level check boxes if you want to coordinate your CallPilot volume settings with your computer speaker and microphone volumes.
5. If you want a reminder to check these settings before playing or recording voice messages, check Confirm settings before playing.
6. If you want to download voice messages to your computer before playing them, check Download file before playing. This option is useful if you use a modem.
7. Click OK.

Linking to My CallPilot

Desktop Messaging provides links to the Web-based resources in My CallPilot. You can link to either the home page or the Greetings page. To view or change the URL for My CallPilot, see Changing your mailbox settings on page 56. For more information about My CallPilot, see the Desktop Messaging User Guide for My CallPilot (NN44200-109).

In your e-mail Inbox, on the Tools menu, click CallPilot Desktop Messaging > My CallPilot, and then click either Home Page or Greetings.

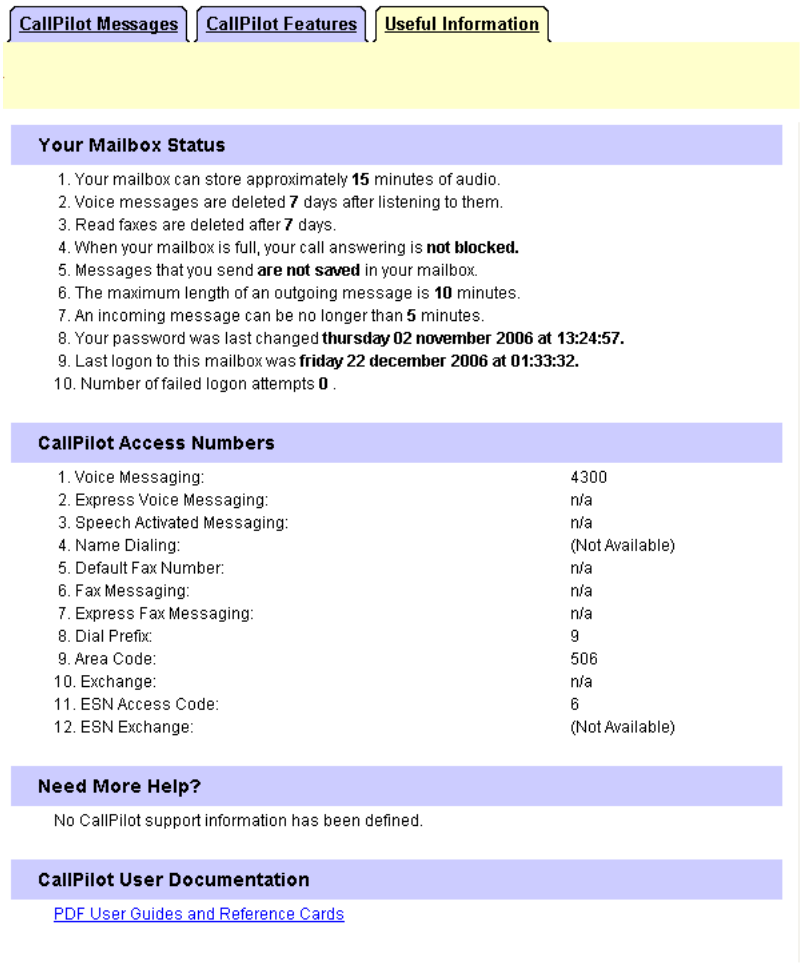
Note:
You can also access My CallPilot from the View menu of the CallPilot Player.

To view or change your CallPilot feature settings

1. In My CallPilot, click the CallPilot Features tab.
2. Select any feature, and make changes to your setup, as required. Any changes you make to a feature take effect immediately, whether you use CallPilot from your computer or from your telephone.

To view user information

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



CallPilot Messages | CallPilot Features | Useful Information

Your Mailbox Status

1. Your mailbox can store approximately **15** minutes of audio.
2. Voice messages are deleted **7** days after listening to them.
3. Read faxes are deleted after **7** days.
4. When your mailbox is full, your call answering is **not blocked.**
5. Messages that you send **are not saved** in your mailbox.
6. The maximum length of an outgoing message is **10** minutes.
7. An incoming message can be no longer than **5** minutes.
8. Your password was last changed **thursday 02 november 2006 at 13:24:57.**
9. Last logon to this mailbox was **friday 22 december 2006 at 01:33:32.**
10. Number of failed logon attempts **0** .

CallPilot Access Numbers

1. Voice Messaging:	4300
2. Express Voice Messaging:	n/a
3. Speech Activated Messaging:	n/a
4. Name Dialing:	(Not Available)
5. Default Fax Number:	n/a
6. Fax Messaging:	n/a
7. Express Fax Messaging:	n/a
8. Dial Prefix:	9
9. Area Code:	506
10. Exchange:	n/a
11. ESN Access Code:	6
12. ESN Exchange:	(Not Available)

Need More Help?

No CallPilot support information has been defined.

CallPilot User Documentation

PDF User Guides and Reference Cards

Working offline

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

1. (Optional) You can download your CallPilot messages to the computer that you use offline. To do so, on the Tools menu, click CallPilot Desktop Messaging > Download all Messages. When your messages are downloaded, log out.
2. (Optional) You can download the server Address Book to your computer. See Changing your Address Book settings on page 61.
3. Open your e-mail, while not connected to the network, and wait for the CallPilot Logon window to appear. You do not need to enter your password.
4. Click Cancel.

You can then work offline, reviewing your messages, and recording and addressing new messages. You must use your computer speakers and microphone to play and record messages offline; you cannot use a telephone for offline access.

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

Message security in offline mode

If you have chosen to store CallPilot messages in a separate CallPilot inbox (rather than your regular e-mail inbox), you can password-protect your messages in Outlook. You might want to do this if you share your computer with others. Because Outlook automatically sends messages stored in the Outbox when you reconnect to the network, other users with access to your Outlook profile can send messages in offline mode that transmit without your knowledge. To protect your mailbox, assign a password to your Outlook .cst file. For details, refer to the Desktop Messaging online Help.

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