

555-7101-223

CallPilot

Installation and Configuration

Part 3: DSE and CallPilot Server Configuration

Product release 2.5

Standard 2.0

April 2004

NORTEL
NETWORKS™

CallPilot

Installation and Configuration

DSE and CallPilot Server Configuration

Publication number:	555-7101-223
Product release:	2.5
Document release:	Standard 2.0
Date:	April 2004

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Printed in Canada

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Publication history

April 2004

Release 2.5, Standard 2.0 of the *CallPilot Installation and Configuration, Part 3, DSE and CallPilot Server Configuration*. released with minor modifications

October 2003

Release 2.5, Standard 1.0 of the *CallPilot Installation and Configuration, Part 3, DSE and CallPilot Server Configuration*.

Contents

1	CallPilot and DSE switch connectivity overview	9
	Overview	10
	Section A: CallPilot network setup	15
	CallPilot and DSE switch integration	16
	Section B: Understanding call routing	19
	DSE switch call routing components	20
	CallPilot Service Directory Numbers and the SDN Table	23
	How calls are routed	25
	Multimedia channels in the CallPilot server	30
	How multimedia channels are acquired by callers	31
2	Connecting the CallPilot server to the switch	33
	Connecting the CallPilot server to the DSE switch	34
3	Configuring the DSE switch	37
	Programming the DSE switch	38
	DSE switch configuration checklist	40
	Creating/configuring digital sets	42
	Designating the Message Waiting Indicator DN	44
	Setting up primary hunt groups	45
	Setting up secondary queues	46
	Programming subscriber sets	47
4	Installing Intel DSE software on the CallPilot server	49
	Installing Intel DSE software	50
	Installing DSE Hot Fixes	54
	Update/Recovery Wizard	55
	DSE Monitor tool Installation	58
	Uninstalling Intel DSE software	60

5	Configuring the CallPilot server software	63
	Overview	64
	Logging on to Windows NT on the CallPilot server	66
	Logging on to the CallPilot server with CallPilot Manager	68
	Running the Configuration Wizard	73
	Changing pcAnywhere caller passwords	75
6	Testing the CallPilot installation	77
	Checking that CallPilot is ready to accept calls	78
	Testing the connection to the CLAN	82
	Verifying that CallPilot can receive calls	83
	Testing the CallPilot software and channels	84
	Index	97

Chapter 1

CallPilot and DSE switch connectivity overview

In this chapter

Overview	10
Section A: CallPilot network setup	15
CallPilot and DSE switch integration	16
Section B: Understanding call routing	19
DSE switch call routing components	20
CallPilot Service Directory Numbers and the SDN Table	23
How calls are routed	25
Multimedia channels in the CallPilot server	30
How multimedia channels are acquired by callers	31

Overview

Introduction

The digital set emulation (DSE) and CallPilot server configuration guide describes:

- connecting the CallPilot system to the DSE switch and the customer LAN (CLAN)
- configuring the DSE switch for correct operation with CallPilot
- configuring the CallPilot server

For a high-level overview of CallPilot and switch connectivity, read the remainder of this chapter:

- “Installation and configuration checklist,” on page 11 for an overview of the installation process
- Section A: “CallPilot network setup,” on page 15 for information about DSE connectivity and components
- Section B: “Understanding call routing,” on page 19

For the glossary and the list of related information products, refer to *Part 1 - Installation and maintenance, 555-7101-210*, in the *CallPilot Installation and Configuration* guides.

Before you begin

Before you proceed with configuring the DSE switch and CallPilot server:

- review the “Installing CallPilot” section in *Part 1 - Installation and maintenance, 555-7101-210*, in the *CallPilot Installation and Configuration* guides
- complete the “Installation and configuration checklist” on page 11

Installation and configuration checklist

Complete the steps in each chapter before you continue to the next chapter.

Step	Description	Check
Stage 1: Install the connectivity hardware.		
1	Connect the CallPilot server to the DSE switch. For instructions, see Chapter 2, “Connecting the CallPilot server to the switch,” on page 33.	<input type="checkbox"/>
Stage 2: Configure the DSE switch and CallPilot server.		
2	Configure the DSE switch. Use the “Switch configuration worksheet” that you completed in <i>Part 1 - Installation and maintenance, 555-7101-210</i> , in the <i>CallPilot Installation and Configuration</i> guides. For configuration instructions, see Chapter 3, “Configuring the DSE switch,” on page 37.	<input type="checkbox"/>
3	Install the Intel DSE board software. For installation instructions, see Chapter 4, “Installing Intel DSE software on the CallPilot server,” on page 49	<input type="checkbox"/>
4	Run the Configuration Wizard and configure the CallPilot server. Use the “Configuration Wizard worksheet” that you completed in <i>Part 1 - Installation and maintenance, 555-7101-210</i> , in the <i>CallPilot Installation and Configuration</i> guides. For configuration instructions, see Chapter 5, “Configuring the CallPilot server software,” on page 63.	<input type="checkbox"/>
5	Change the pcAnywhere passwords. For instructions, see “Changing pcAnywhere caller passwords” on page 75.	<input type="checkbox"/>

Step	Description	Check
------	-------------	-------

Stage 3: Test CallPilot connectivity.

Note: For instructions, see Chapter 6, “Testing the CallPilot installation,” on page 77.

6	Check CallPilot’s system ready indicators to see if CallPilot is ready to accept calls.	<input type="checkbox"/>
7	Test the connection to the CLAN.	<input type="checkbox"/>
8	Verify that CallPilot answers when you dial the Voice Messaging DN.	<input type="checkbox"/>

Stage 4: Test the CallPilot services and channels.

Note: For instructions, see Chapter 6, “Testing the CallPilot installation,” on page 77.

9	Check the system-ready indicators.	<input type="checkbox"/>
10	Verify network connectivity to the CallPilot server over the CLAN.	<input type="checkbox"/>
11	Verify that CallPilot can receive calls.	<input type="checkbox"/>
12	Verify that you can leave a message.	<input type="checkbox"/>
13	Verify that you can retrieve a message.	<input type="checkbox"/>
14	Verify that each call channel and multimedia channel is functioning correctly.	<input type="checkbox"/>

Step	Description	Check
<hr/> Stage 5: Install CallPilot Manager on a stand-alone web server (optional). <hr/>		
15	<p>Perform this step only if you want to set up a separate web server for CallPilot administration. This is necessary using the Reporter application or where high administration traffic is expected.</p> <p>For instructions, refer to <i>Part 4 - Software installation and maintenance</i>, 555-7010-202, in the <i>CallPilot Installation and Configuration</i> guides.</p>	<input type="checkbox"/>

Section A: CallPilot network setup

In this section

CallPilot and DSE switch integration

16

CallPilot and DSE switch integration

Introduction

This section describes how the CallPilot server is integrated into your network with the DSE switch.

CallPilot connectivity

Digital set emulation (DSE) connectivity enables CallPilot to integrate with a supported switch using a CallPilot server and installed DSE boards. To the Rolm switch, each port on the DSE board in the CallPilot server looks like one digital phone set. DSE software reads the display information from the emulated phone set and emulates the key presses. An installation can provide up to 64 channels (with one channel dedicated to the message waiting indicator) and 96 multimedia processing units (MPU).

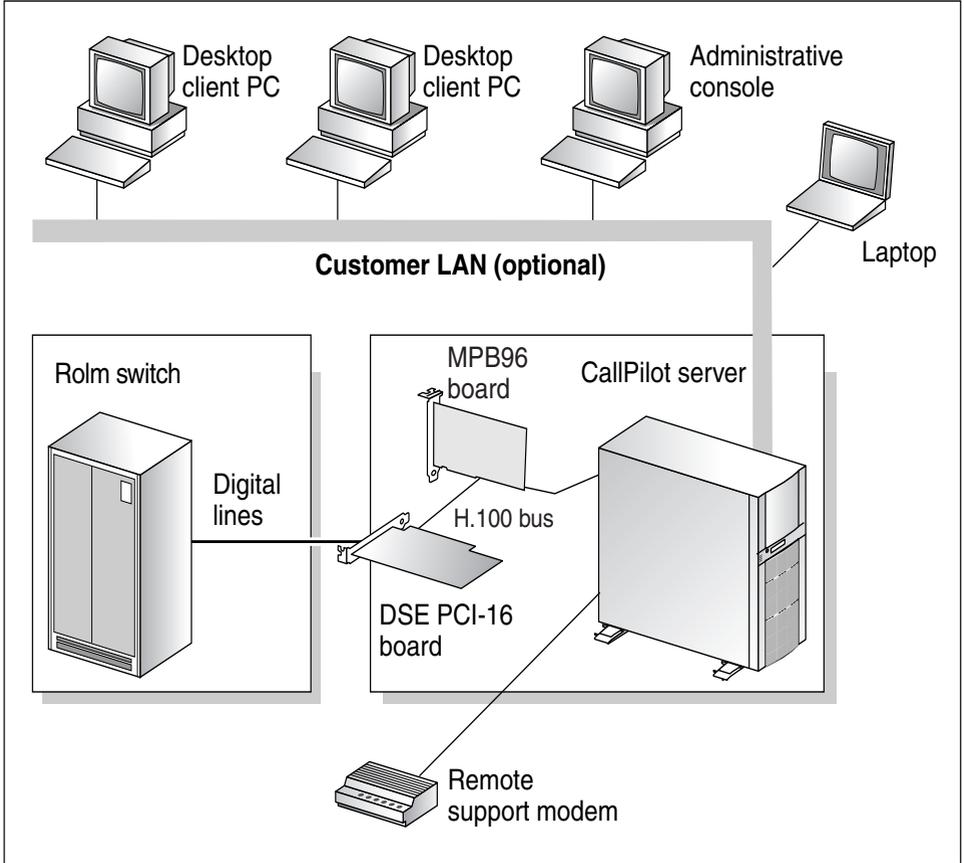
Installation and configuration

Installation consists of setting up the hardware (server, DSE boards and bus, cable to the switch) and configuration of the switch and CallPilot server. Use the “Switch configuration worksheet” and “Configuration Wizard worksheet” that you completed in *Part 1 - Installation and maintenance*, 555-7101-210, in the *CallPilot Installation and Configuration* guides.

Sample network diagram

703t tower servers

The following diagram shows an example of how a tower server can be integrated with the DSE switch in your network:



G250002

CallPilot components

CallPilot server

The CallPilot server connects to the DSE switch and the customer LAN (CLAN).

MPB96 board

The MPB96 board provides DSE connectivity to process the signals that pass through the DSE boards.

DSE board

The DSE board is the interface that passes signals from the DSE switch to the MPB96 board. When CallPilot transmits data to the DSE switch, the DSE board emulates signals sent by supported digital sets.

A DSE board provides 16 channels of DSE connectivity to the DSE switch. Nortel Networks recommends that the last channel on the first DSE board be used for the Message Waiting Indicator (MWI) line. There is only one MWI in the system. Up to four PCI boards can be plugged into the CallPilot server.

H.100 bus

The H.100 voice bus connects the MPB96 and DSE board(s).

Modem

The server connects to a modem to allow remote access by a support PC for installation, maintenance, and diagnostics.

Desktop client PCs

You can install desktop client messaging software on client PCs to enable mailbox users to receive phone, fax, and voice mail on their PCs. For more information, refer to the *Desktop Messaging and MY CallPilot Installation guide* (555-7101-505).

Any PC that has network access to the CallPilot server and has a web browser installed can be used to administer CallPilot. The CallPilot administration is web-based.

Section B: Understanding call routing

In this section

DSE switch call routing components	20
CallPilot Service Directory Numbers and the SDN Table	23
How calls are routed	25
Multimedia channels in the CallPilot server	30
How multimedia channels are acquired by callers	31

DSE switch call routing components

Hunt groups

Hunt groups are a feature on the DSE switch that allows multiple telephones to be available to answer incoming calls to a single number. In the case of CallPilot, the telephones are actually ports on the CallPilot server. CallPilot answers the call and provides the appropriate service to the caller.

Primary hunt groups

CallPilot uses primary hunt groups to allow different services of the same media type (voice, fax, or speech recognition) to share the same group of ports on the CallPilot server. To allow different services to share a group of ports, create a hunt group made up of the individual directory numbers (DN) for those ports.

Note: A port can only belong to one primary hunt group.

For CallPilot's purposes, a hunt group can only carry one type of media traffic (voice, fax, or speech recognition). Therefore, at a minimum, you need one primary hunt group for each media type used on your system. Then, calls to any service of that media type can be forwarded to this hunt group and answered by the first available port in the hunt group.

Why assign CallPilot ports to one media type?

CallPilot ports are all physically identical and can carry traffic of any media type. However, you must assign each port to one of the media types carried on your CallPilot system (voice, fax, or speech recognition, if installed). This serves two purposes:

- The profile of calls being presented to your system must match the number and types of channels purchased and licensed for your CallPilot system. If your server has the DSP processing power for ten voice channels, four fax channels, and two speech recognition channels, then

the ports on your CallPilot server must match those numbers. Otherwise, your server's call processing resources cannot keep up with the demand (twelve ports transmitting voice calls, only ten channels' worth of DSP processing power), or they are partly idle (eight ports transmitting voice calls, ten channels of DSP processing power in the server devoted to voice calls).

Each port on your switch, which maps one-to-one to ports on your CallPilot server, must be devoted to a particular media. The number of ports allotted to each medium must match the number of channels allocated to that medium in your CallPilot server.

- A primary hunt group can only contain ports of one media type. If you mix media types in a primary hunt group (a fax port with voice ports), then the process that allocates processing resources to different channels cannot work properly.

Secondary queues

You must create a secondary queue for each directly dialable service in your CallPilot system, except for Call Answering (voice or fax), Voice Messaging, and Fax Messaging. Based on the switch, a secondary queue can be one of

- a hunt group with no DNs in it, which is forwarded to a primary hunt group
- a phone set that is always call forwarded to a primary hunt group

The function of a secondary queue is to provide a unique DN for each directly dialable service. A caller dials the DN for a service; the secondary queue that matches that DN forwards the call to the appropriate primary hunt group, which puts it through to the CallPilot server on the first available port. CallPilot uses the "called DN," which is the secondary queue's DN, to identify the service it must provide for this particular caller.

Which services require a secondary queue DN?

CallPilot services that accept incoming calls (except Voice Call Answering, Fax Call Answering, Voice Messaging, and Fax Messaging) require a DN on the switch. Services that make outgoing calls only (such as Remote Notification) do not require a DN on the switch. By assigning a secondary queue DN to a service, you give it a unique DN that is recognized by the switch and by CallPilot whenever a call comes in for that service.

How does the CallPilot server recognize an SDN?

The secondary queue DN that is defined on the switch must also be defined on the server as a Service Directory Number (SDN). Each secondary queue DN is mapped to a specific service in the SDN Table. The DN defined on the switch and server must be the same.

Dedicating one or more ports to a particular service

In the scenarios described previously, several services share ports on the switch (and the matching ports on the CallPilot server) on a first-come, first-served basis. You might want to dedicate a port to a particular service so that it is always available to the service when it wants a port. However, Nortel Networks advises that you do not dedicate ports unless it is deemed absolutely necessary, since it decreases overall efficiency in handling calls.

To dedicate a port to a particular service, create a primary hunt group with that port's DN as the only member. You cannot include this port's DN in any other hunt group. Add the primary hunt group DN to the SDN Table, and associate it with the service to which it is dedicated. Users who dial this DN receive that service.

See also

- “CallPilot Service Directory Numbers and the SDN Table” on page 23

CallPilot Service Directory Numbers and the SDN Table

Introduction

When a call arrives at a primary hunt group either directly or indirectly from a secondary queue or digital set DN, the DSE switch gives the caller ringback treatment. While this happens, the dialed DN is looked up in the SDN Table in CallPilot to determine what service is required.

What is the SDN Table?

The SDN Table is where the primary hunt group and secondary queue that have been configured on the DSE switch for your CallPilot services are recorded. In this table, the DN (now called an SDN) is associated with a specific service. You use CallPilot Manager Service Directory Number screen to administer the SDN Table.

What the SDN Table controls

In addition to specifying which service should be activated when a number is dialed, the SDN Table also controls

- the type of channel the service acquires (voice, fax, or speech recognition)
- the session behavior for certain services, such as those created with Application Builder (including the maximum session length and a number of fax options)

Types of SDNs

There are two types of SDNs—inbound SDNs and outbound SDNs.

Inbound SDNs require DNs on the DSE switch

Services that callers dial need inbound SDNs. An inbound SDN corresponds to a primary hunt groups and secondary queue on the DSE switch since callers must be able to dial in to the DSE switch with a unique number.

Outbound SDNs do not need DNs on the DSE switch

Callers do not dial outbound SDNs. The system uses outbound SDNs to place outbound calls. Since outbound SDNs do not accept incoming calls, a corresponding CDN, phantom DN, or dummy ACD DN is not necessary on the DSE switch.

The following services use outbound SDNs:

- outcalling services (Remote Notification, Delivery to Telephone, Delivery to Fax)
- networking services (AMIS and Enterprise)

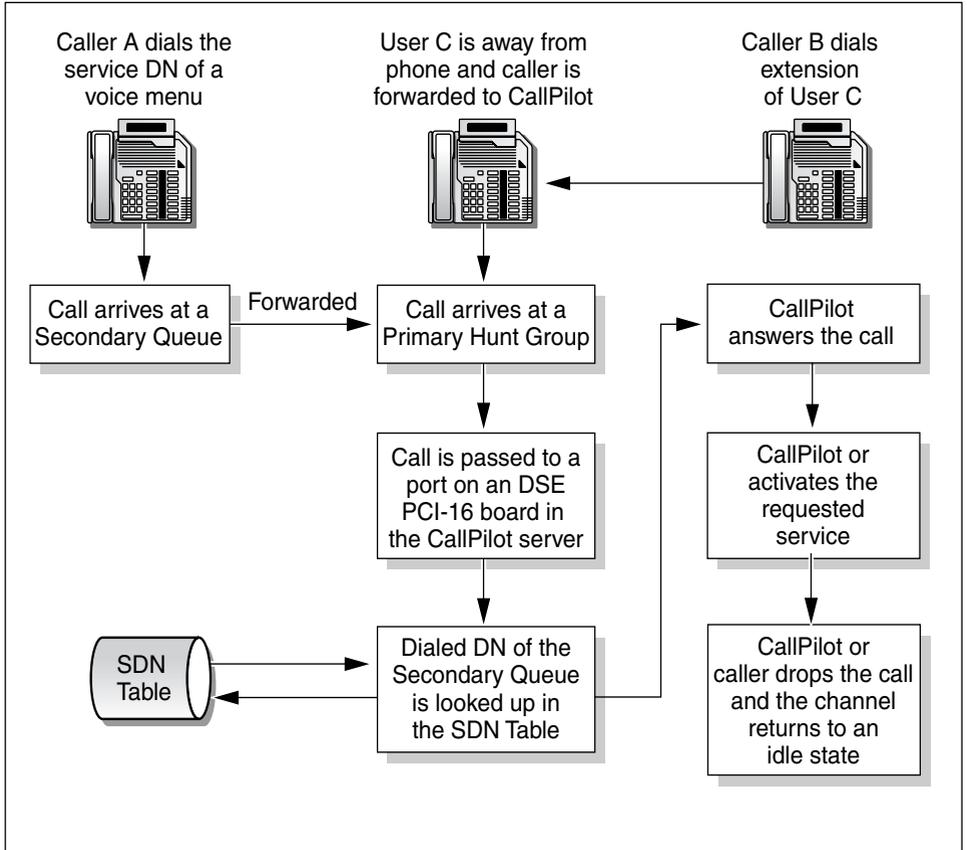
How calls are routed

Introduction

The switch accepts incoming calls and routes them to the appropriate CallPilot services. An understanding of how calls are routed is necessary for configuring the switch and CallPilot to interact correctly.

The following illustration shows how a call based on the dialed number (DN) is routed to the appropriate CallPilot services.

Call flow example



G250001

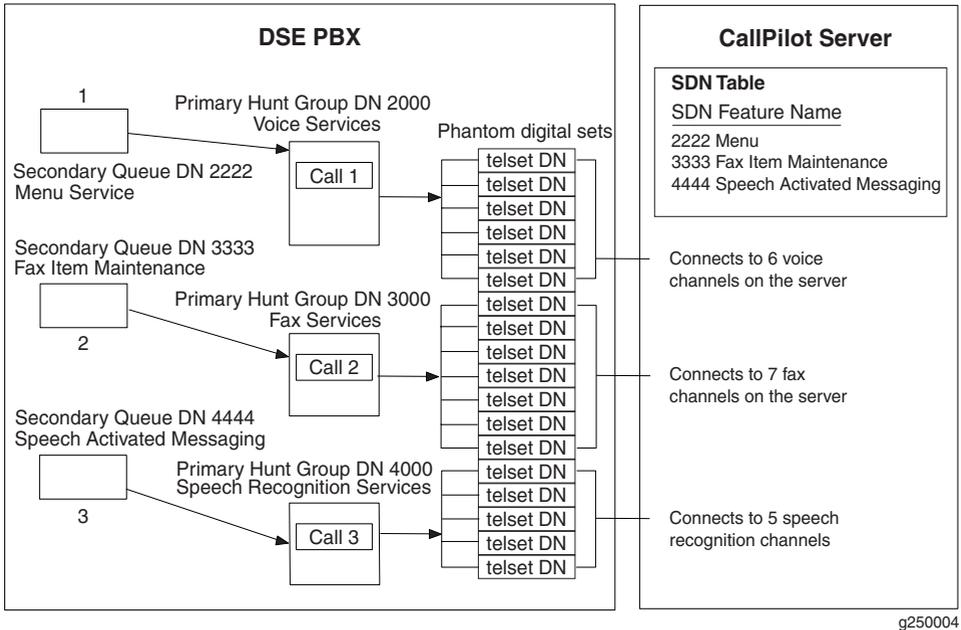
Example

The example describes putting a new menu application into service using available DN 2222.

On the switch, create a secondary queue with the DN 2222. Forward it to a primary hunt group that carries the appropriate media type. For example, if the menu contains voice only, it can forward to a voice primary hunt group. If it receives and sends fax items, it must be forwarded to a fax primary hunt group. If it contains speech recognition services, forward it to a speech recognition primary hunt group. In the SDN Table, enter 2222 as the SDN for this service. This is the number that callers dial to access the menu.

Three primary hunt groups have been configured: voice (DN is 2000), fax (DN is 3000), and Speech Recognition (DN is 4000). Three secondary queue DNs have been configured:

- 2222 is the DN for a menu service (without fax or speech recognition items)
- 3333 is the DN for Fax Item Maintenance
- 4444 is the DN for Speech Activated Messaging



What happens when services are dialed up

1. A caller dials 2222 to access the menu service. This menu service requires only voice processing (it contains no fax or speech recognition components).
2. This secondary queue 2222 has been set to forward to the voice primary hunt group 2000 because only voice processing is required. The call is picked up by the first available phantom digital set in the hunt group.
3. On the server, CallPilot looks up the dialed DN in the SDN Table to check which service is being requested, the media type required, and the channel allocations for each service. CallPilot determines that the call to DN 2222 requires a voice channel, so the call is routed to a voice channel on the server.

4. Another caller dials 3333 to access the Fax Item Maintenance service. The call is forwarded to the fax hunt group 3000. CallPilot looks up the DN in the SDN Table and determines that a fax channel is required, so the call is routed to a fax channel on the server.
5. Another caller dials 4444 to access the Speech Activated Messaging. The call is forwarded to the speech recognition hunt group 4000. CallPilot looks up the DN in the SDN Table and determines that a speech recognition channel is required, so the call is routed to a speech recognition channel on the server.

Multimedia channels in the CallPilot server

Multimedia Processing Units

Calls that come in to CallPilot need DSP processing power to support the voice, fax, and speech recognition features. This DSP processing power is provided by multimedia processing units (MPUs) in the CallPilot server. The MPB96 board in the CallPilot server provides the MPUs.

Types of multimedia channels

Certain types of media need more channel resources to process them. As a result, three types of multimedia channels handle the various types of CallPilot services.

Each type of channel terminates on a different number of MPUs, based on how much DSP processing power is required. For example, integrated fax and voice data takes twice as much DSP processing power as voice-only media. A fax channel, therefore, terminates on two MPUs.

Channel type	Description	Number of MPUs
Voice	One voice channel requires one MPU.	1
Fax	Fax needs twice as much DSP processing power as voice-only media, and, therefore, requires two MPUs for one fax channel.	2
ASR (automated speech recognition)	Speech recognition needs four times as much DSP processing power as voice-only media, and, therefore, requires four MPUs for one speech recognition channel.	4

How multimedia channels are acquired by callers

Introduction

The switch routes a call based on the primary hunt group at which the call arrives. The call goes directly to the CallPilot call channel. The CallPilot system uses the information gathered from the SDN configuration to determine what service is required. The system checks for an idle multimedia channel of the type required by the service.

What happens if no channels are idle

If there is an idle channel (of the needed media type), the system passes the call to CallPilot. If no channel is available, the system responds with ringback for the channel.

What happens when the call is answered

Once a multimedia channel of the appropriate type becomes idle, the call arrives at the multimedia channel and is passed to CallPilot.

Since the SDN Table has already been checked, the requested service is known and is activated. The service also answers the call.

Based on which service is activated, one of the following results happens:

- The appropriate prompt is played.
- CallPilot receives a fax.
- CallPilot records a message.

What happens when the call is dropped

Once CallPilot or the caller drops the call (hangs up), the multimedia channel returns to an idle state, ready to be acquired by another call.

What's next?

Continue with Chapter 2, “Connecting the CallPilot server to the switch,” on page 33.

Chapter 2

Connecting the CallPilot server to the switch

In this chapter

Connecting the CallPilot server to the DSE switch

34

Connecting the CallPilot server to the DSE switch

This chapter describes connecting the digital lines from the CallPilot server to the DSE switch.

Note: CallPilot installation documentation does not include detailed instructions for installing line cards in the switch. For instructions on installing line cards in the switch, refer to the switch documentation.

Required components

Component	Description
DSE cable	Connects the DSE board to the switchboard cable
Switchboard cable	Connects the DSE cable to the switch at the punch-down board
Punch-down board cabling	Connects the punch-down board to the switch

To connect the server to the switch

The DSE boards are installed in the server.

- 1 At the rear of the CallPilot server, connect a DSE cable to the switch connector of the first DSE board. (The first DSE board is in slot 4, the closest to the MPB board.)
- 2 Connect the other end of the digital cable to the switchboard cable.
- 3 Connect the free end of the switchboard cable to the punch-down board for the switch. Consult the switch technician for detailed instructions.

For a table of pinouts, see “Line terminations for connecting the switch,” on page 36.

- 4 Complete any cabling that is required from the punch-down board to the switch. Consult the switch technician for detailed instructions.
- 5 Repeat steps 1 to 4 for each DSE board. Install each cable starting from the top and moving down

Result: The cabling between the server and the switch is complete.

What's next?

Continue with Chapter 3, “Configuring the DSE switch” on page 37.

Line terminations for connecting the switch

The pinouts shown in the following table are used by the digital cable and the Switchboard cable that connect the server to the punch-down board.

DSE line	Pin number	Pair color	Lead designation
1	26	W-BL	LNEG 0
	1	BL-W	LPOS 0
2	29	W-BR	LNEG 1
	4	BR-W	LPOS 1
3	32	R-O	LNEG 2
	7	O-R	LPOS 2
4	35	R-S	LNEG 3
	10	S-R	LPOS 3
5	38	BK-G	LNEG 4
	13	G-BK	LPOS 4
6	41	Y-BL	LNEG 5
	16	BL-Y	LPOS 5
7	44	Y-BR	LNEG 6
	19	BR-Y	LPOS 6
8	47	V-O	LNEG 7
	22	O-V	LPOS 7
9	28	W-G	LNEG 8
	3	G-W	LPOS 8
10	31	R-BL	LNEG 9
	6	BL-R	LPOS 9
11	34	R-BR	LNEG 10
	9	BR-R	LPOS 10
12	37	BK-O	LNEG 11
	12	O-BK	LPOS 11
13	40	BK-S	LNEG 12
	15	S-BK	LPOS 12
14	43	Y-G	LNEG 13
	18	G-Y	LPOS 13
15	46	V-BL	LNEG 14
	21	BL-V	LPOS 14
16	49	V-BR	LNEG 15
	24	BR-V	LPOS 15

Chapter 3

Configuring the DSE switch

In this chapter

Programming the DSE switch	38
DSE switch configuration checklist	40
Creating/configuring digital sets	42
Designating the Message Waiting Indicator DN	44
Setting up primary hunt groups	45
Setting up secondary queues	46
Programming subscriber sets	47

Programming the DSE switch

Chapter 3, “Configuring the DSE switch,” describes the tasks for configuring the switch. For information on specific commands and responses used in the switch's programming interface, see the switch's documentation.

The configuration of the switch must match the configuration of CallPilot:

- the number of voice, fax, and SR channels on the switch must be the same as in the keycode,
- the cabling must consistent with the programming of the CallPilot server.

The call model

Each port on the DSE board(s) installed in the CallPilot server is connected to a port on the switch and configured in the switch as a digital set. Digital sets form hunt groups, each hunt group having a single extension number. When required, the switch transfers incoming calls to the appropriate hunt group. The CallPilot server picks up the call and plays the appropriate greeting. CallPilot uses the same switch-DSE connection to send commands and information back to the switch as required, emulating the interface presented by a digital set connected to the switch.

RoIm switch hardware and software requirements

The following table shows:

- switch model supported
- line cards that work with CallPilot
- minimum switch software version required
- digital set emulated

If the line card is not already installed, then refer to the switch documentation for installation instructions

Digital set emulated	Switch model	switch supported software	Line card
ROLMphone 400	8000	8003 +	RPI set [63C24 & 506328]
	9000	All versions	RLI: 90678
	9751 (9005)	All versions	RLI: 90678
	9751 (9006)	9006.3 +	SLRM, SLRM2, SLRM3

Before you begin

Before you begin switch programming, you must have the following information ready:

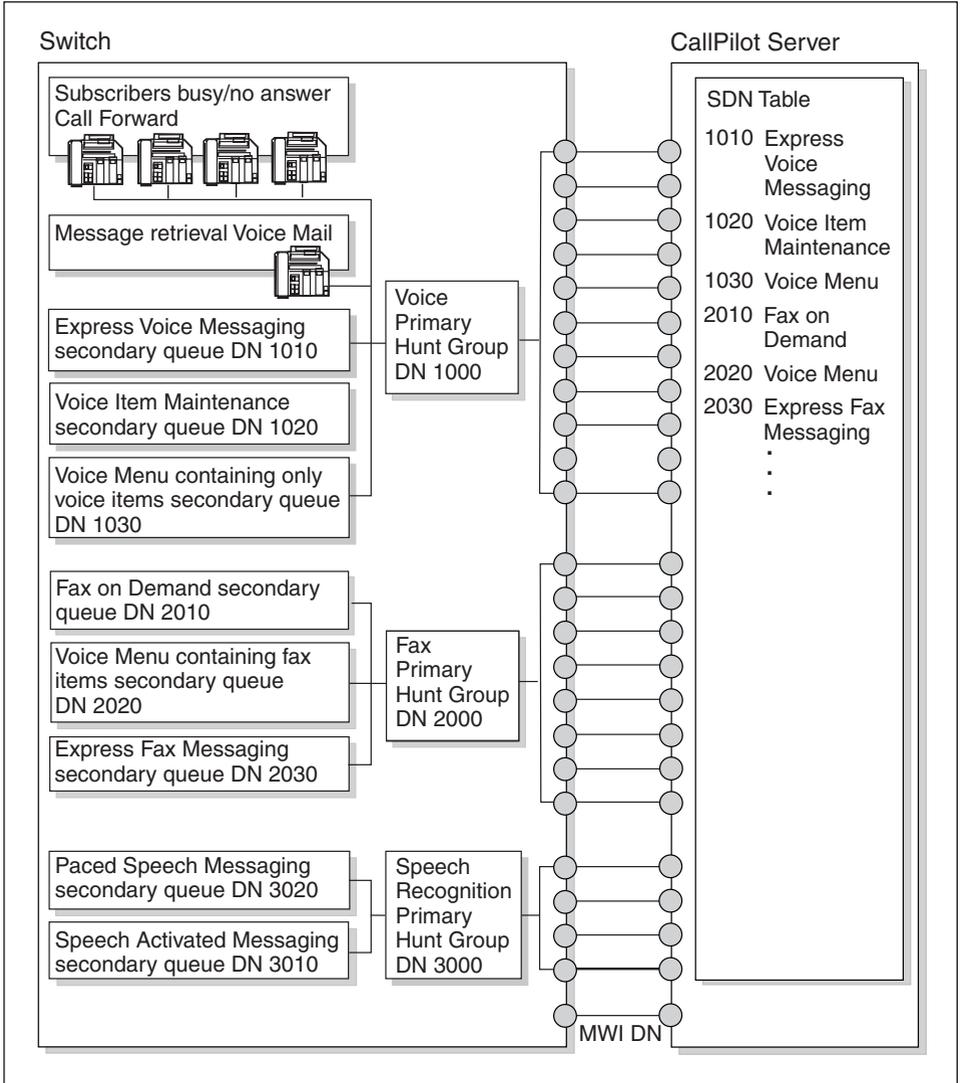
- switch port addresses and DNs for each port (16 for each card) on the DSE board(s) in your CallPilot server
- DNs for each of the primary hunt groups (at a minimum, there must be one primary hunt group for each media type on your voice mail system: voice, fax, or speech recognition)
- DNs for all directly dialable CallPilot services you plan to add to your system
- Class of Service/Class of Restriction (COS/COR) to be applied to outgoing calls on CallPilot (DSE) ports. CallPilot incorporates its own calling restrictions. Set the restrictions when you set up the messaging system. The COS/COR applied to the DSE DNs must not be more restrictive than the CallPilot settings or CallPilot cannot function properly.

DSE switch configuration checklist

The checklist lists the tasks for configuring CallPilot and DSE switch to work together. The rest of the chapter provides detailed instructions.

Step		See page	Check
1	On the switch, create and configure one digital set for each DSE port (16 for each card) installed on the CallPilot server.	page 42	<input type="checkbox"/>
2	Designate one digital set for processing Message Waiting Indicator (MWI) signals. Note: Nortel Networks recommends using the last channel on the first DSE board for the MWI channel. Do not include this port in any hunt groups that will receive and send calls.	page 44	<input type="checkbox"/>
3	Set up primary hunt groups; assign each digital set configured in step 1 to a hunt group, leaving out the MWI line designated in step 2. (Minimum of one hunt group for each media type: voice, fax, or speech recognition)	page 45	<input type="checkbox"/>
4	Add a secondary queue for each service to be directly dialable by users.	page 46	<input type="checkbox"/>
5	Program the subscriber sets.	page 47	<input type="checkbox"/>

High level view of DSE switch programming.



g250003

Creating/configuring digital sets

Creating and configuring digital sets on the switch activates the switch ports that service the voice messaging system. Create and configure one digital set for each DSE port (16 for each card) installed on the CallPilot server. The virtual digital sets you create for the DSE ports require specific COS settings.

- 1 Before creating the sets, modify the default COS 15 settings as recommended in the following table:

Prompt	Response	Description
APV	Yes	Always in privacy
NFL	No	No flash allowed
NOH	Yes	No howler
DND	No	Do not disturb

- 2 Locate an available ROLMphone Interface (RPI) channel in the CBX. This is the basic digital port used by ROLMphone digital sets. Configure it to indicate that a ROLMphone 400 will be attached.
- 3 Locate an unused Feature Configuration Table. Configure it to match the following specifications:

Prompt	Response	Description
Key 9	LINE 1	Line 1
Key 10	HOLD	Hold
Key 30	CNCT	Connect
Key 37	MWCTR	Message Waiting Center
Key 38	XFER	Transfer

- 4 Create one set for each port on the DSE board(s) in your CallPilot server. Use the set configuration requirements laid out in the following table:

Prompt	Response	Description
Type	EXT	
COS	15	
Set Type	400	
TBL NO.	<table_no.>	Assign the table you have configured for use with the DSE ports.
SPKR PHONE	N	
EXTN 1	<ext_#>	Assign each set a unique extension number.
R	Y	
MW	N	
BI	N	
CLD NME	N	

Designating the Message Waiting Indicator DN

CallPilot uses the Message Waiting Indicator (MWI) DN to turn on (message waiting) or turn off (message retrieved) subscribers' MWI indicators as messages are left and retrieved.

ATTENTION

Since this line must be free to transmit MWI On and MWI Off signals, do not include it in any hunt groups that process incoming calls

- 1 Designate one of the configured sets as the Message Waiting Indicator (MWI) DN.

Note: Nortel Networks recommends that the digital set be associated with the last port on the first DSE board for the MWI DN. If you have configured a digital set for each port on the first DSE board, this is the 16th digital set and the 16th DN.

- The first DSE board must be operational for CallPilot to receive calls. If the first DSE board fails, the MWI port is disabled but CallPilot is also not able to receive calls. As long as CallPilot is receiving calls, the MWI functionality is also operational if you use a port on the first DSE board for MWI.
 - If the first DSE board fails and a new card is not readily available, you can use another DSE board in the CallPilot server to replace the first DSE board. For information on replacing the DSE board, see Part 5 of the *CallPilot Installation and Configuration* guides.
- 2 There is no switch programming required for this step:
 - Record the designated DN
 - Later in the installation procedure, you are instructed to program CallPilot to use it for MWI signals.

Setting up primary hunt groups

Setting up primary hunt groups creates collection points for incoming calls to CallPilot. Calls are then distributed to available ports in the hunt group.

Each primary hunt group contains one or more of the DSE port DNs. At a minimum, you need one hunt group for each media type (voice, fax, or speech recognition) on your system. The digital sets or ports contained in a hunt group can only process calls of one media type. Where necessary, add one coverage path for each hunt group, with that hunt group as its destination

ATTENTION

Each DSE port DN can only appear in one hunt group.

Each DSE port DN (except the designated MWI DN) must be included in a primary hunt group. Otherwise, no calls are sent to that port, and it remains idle.

- 1 Assign each digital set configured in “Creating/configuring digital sets” on page 42 to a hunt group. Leave out the MWI line designated in “Designating the Message Waiting Indicator DN” on page 44.

Configure the hunt group according to the following table:

Prompt	Response	Description
Group Type	D	
COS	0	
Fwd/Busy Capability	N	

Setting up secondary queues

Adding a secondary queue gives each directly dialable service an individual DN. Each secondary queue (either a hunt group with no DNs in it, or a telset set to call forwarding for all calls) forwards calls to the appropriate primary hunt group. A user dials the DN, and CallPilot answers the call with the service that matches that called DN.

- 1 Add one secondary queue for each directly dialable CallPilot service (for example, Express Fax Messaging or a Voice Menu).

Note: Do not create secondary queues for Voice Call Answering, Fax Call Answering, and Voice Messaging. Calls for these services go directly to the appropriate primary hunt groups.

- 2 Once a secondary queue has been added and set to call forward to the appropriate primary hunt group (voice, fax, or speech recognition), you can remove the telset from the physical port on the switch.

Note: Services that can invoke other services must be forwarded to a primary hunt group that can accommodate all the services in the list.

For example, if a Voice Menu incorporates:

- only voice items, forward it to the Voice primary hunt group DN
- a fax item, forward it to the Fax primary hunt group DN
- a speech recognition item, forward the voice menu's secondary queue to the Speech Recognition primary hunt group.

Programming subscriber sets

Programming the subscriber sets makes the link between subscribers and Call Answering/Voice Messaging:

- Busy/No Answer calls are sent to Call Answering
- CallPilot can signal the presence of messages
- subscribers can access their mailboxes to retrieve messages

Program the subscriber sets for interaction with CallPilot, as follows:

- 1 Set voice lines to forward to the voice primary hunt group DN in busy and ring-no-answer conditions.
- 2 Assign a message waiting button programmed to the voice primary hunt group DN, so that each set has notification of waiting messages and a route to collect them.
- 3 Set fax lines to forward to the fax primary hunt group DN in busy and ring-no-answer conditions.
- 4 For voice users, publish the voice primary hunt group DN, or program it into a key on the subscriber set, or both, to provide a route for retrieving messages. Where necessary, include subscriber DN in the subscriber's Name field.

Chapter 4

Installing Intel DSE software on the CallPilot server

In this chapter

Installing Intel DSE software	50
Installing DSE Hot Fixes	54
Update/Recovery Wizard	55
DSE Monitor tool Installation	58
Uninstalling Intel DSE software	60

Installing Intel DSE software

Introduction

The DSE software is installed manually. The software can be installed before or after the CallPilot Server software has been installed on the server but must be installed before the Configuration Wizard is run.

The software installation wizard works in two modes:

- fresh installation—if no digital set emulation (DSE) software is detected on the server, the wizard is launched (see “To install Intel DSE software,” on page 50)
- update/recovery—if DSE software is detected, the wizard provides the options to modify or repair the configuration (see “Update/Recovery Wizard,” on page 55)

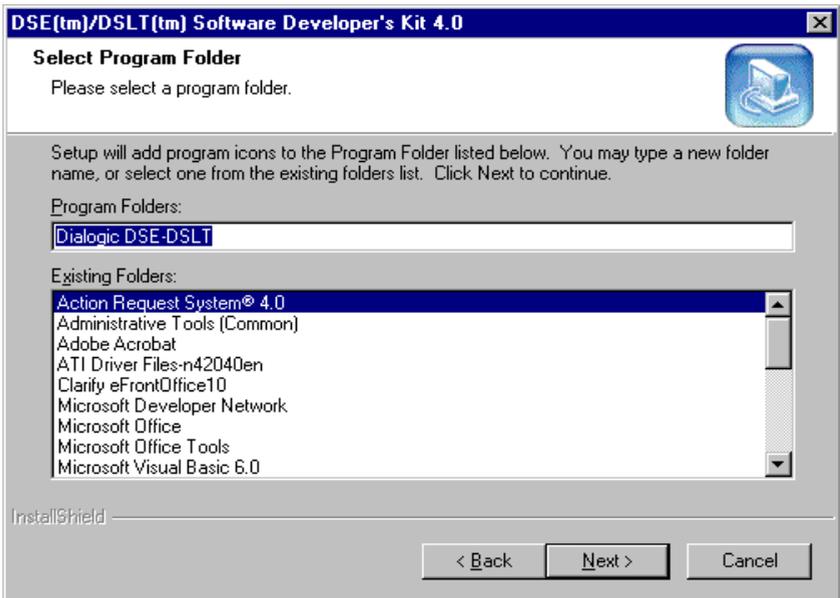
To install Intel DSE software

- 1 Insert the CallPilot PEP CD-ROM into the CD-ROM drive.
- 2 Launch Windows NT Explorer.
- 3 Click the CD-ROM drive.
- 4 Open the folder:
`\\PEP\Dse`
- 5 To start the DSE software installation, double-click the file:
`\\PEP\Dse\DSE-DSLT_SDK.exe`
- 6 Click Next in the window Welcome to the InstallShield Wizard appears.
- 7 Click Next in the Extracting Files window after the files have been extracted.
- 8 Click Next when the window Welcome to the InstallShield Wizard reappears.
- 9 Click Yes in the License Agreement window to agree to the terms.

- 10 Click Browse in the Choose Destination Location window to create a directory where in which to install the files.

Result: The Choose Folder dialog box appears.

- 11 In the Path field, enter D:\VBPC, then click OK.
- 12 Check that the path is correct as displayed in the Choose Destination Location window, and click Next.
- 13 In the Setup Type window, select Native API/TAPI System Software, and click Next.
- 14 In the Select Program Folder window, select the default folder Dialogic DSE-DSL, and click Next.

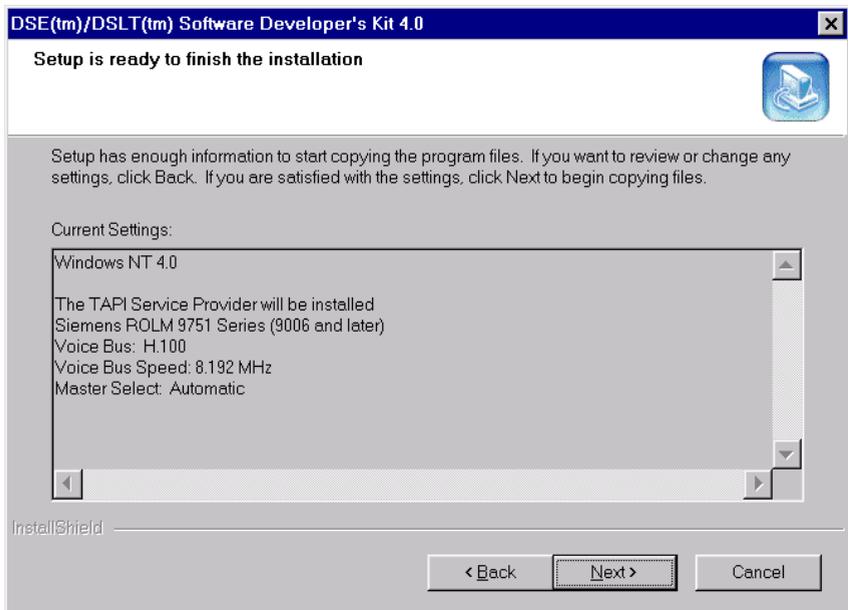


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- 15 In the window Select the PBX that matches your DSE/DSL board, select the PBX type based on your PBX type and PBX software version, and click Next.

Example: For a ROLM PBX 9751 model with software version 9004, select Siemens ROLM 9751 (9005 and earlier).

- 16 In the Select the Voice Bus window, select the H.100 DSE/DSLТ with H.100 cards option, and click Next.
- 17 In the Select the voice bus speed of your system window, select 8.192 MHz, and click Next.
- 18 In the Voice Bus Master Select window, select Auto: DSE/DSLТ auto-assigned as master, and click Next.
- 19 In the Setup is ready to finish the installation window, click Next to accept the settings and begin copying files. Otherwise, click Back to modify the settings.



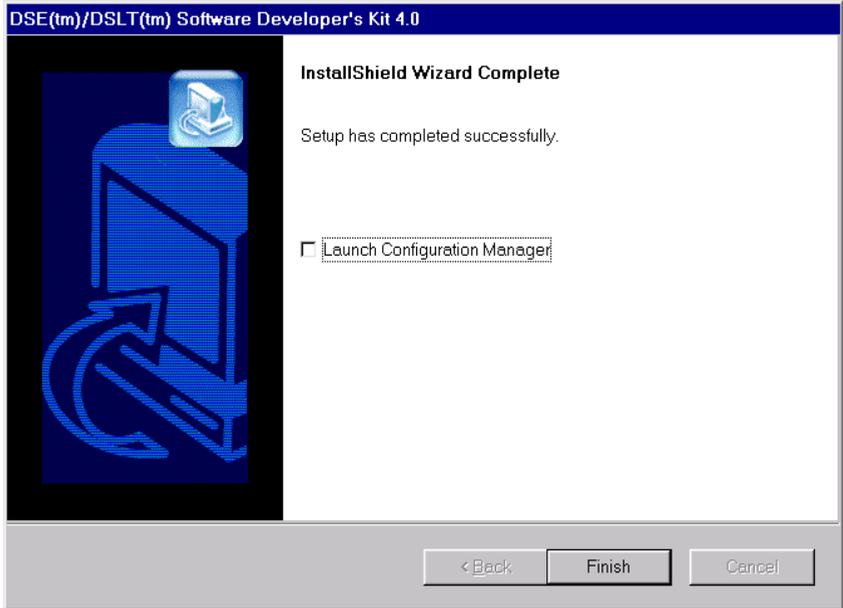
g250075

Result: After clicking Back, a question dialog box requests that DNA be installed.

- 20 Click No to continue without installing the Dialogic DNA.

Result: The Setup Status window displays the status of files being installed.

- 21 In the InstallShield Wizard Complete window, deselect the Launch Configuration Manager check box, and click Finish.



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Installing DSE Hot Fixes

Hot Fixes must be installed after the Dialogic board software has been installed. The setup searches for the directory in which the DSE software is installed and replaces any files that need to be updated.

- 1 Open the Hot Fixes folder:

```
\\PEP\Dse\HotFixes
```

- 2 Launch the Hot Fix installation by double-clicking on:

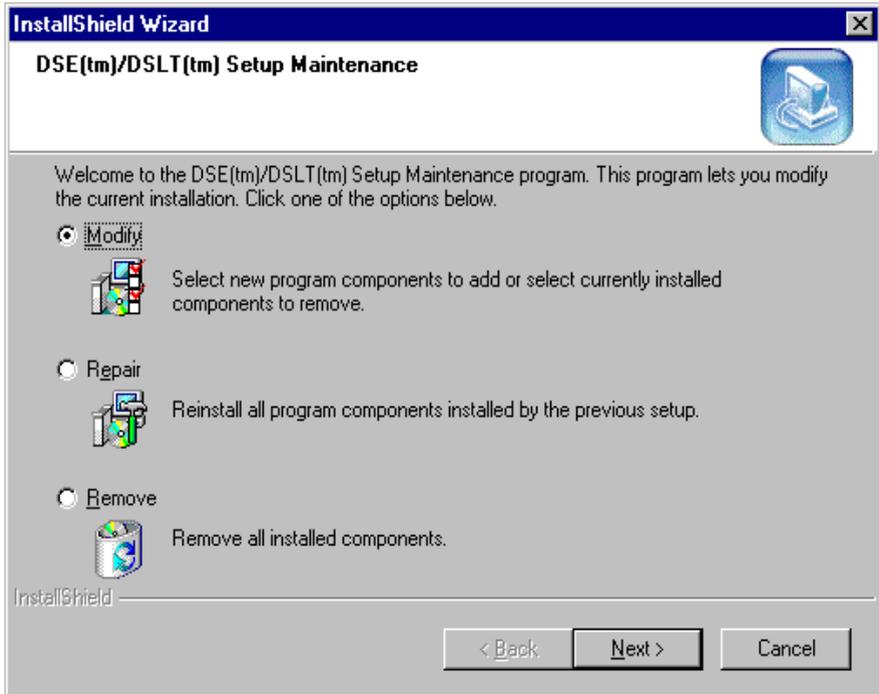
```
\\PEP\Dse\HotFixes\DSE HotFix<issue_no.> for V4.0.exe
```

The window Welcome to the InstallShield Wizard appears.

- 3 Click Next.
- 4 In the License Agreement window, click Yes to accept.
- 5 After reviewing the release notes window, click Next.
- 6 In the InstallShield Wizard Complete window, select Yes, I want to restart my computer now.
- 7 Click Finish.

Update/Recovery Wizard

If the DSE setup program detects DSE software already installed on the server, the setup maintenance wizard is launched for modifying, repairing, and removing DSE software.



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Modify

The Modify tool adds new components or removes existing components from the current installation of DSE software.

To install the Modify tool:

- 1 Click the Modify button on the Setup Maintenance dialog, and click Next.
- 2 Check the box for TAPI Service Provider Files in the select Components window, and click Next.

Result: The Setup Status window shows the progress of the installation.

- 3 Click Finish in the Maintenance Complete window, click Finish.

Repair

The Repair tool can be used to fix a corrupted DSE installation (such as a file deleted by mistake). It checks the components installed on the server and reinstalls components to their existing locations.

To install the Repair tool:

- 1 Click the Repair button on the Setup Maintenance dialog, and click Next.

Result: The Setup Status window shows the progress of the installation.

- 2 Click Finish in the Maintenance Complete window.

Remove

The Remove tool provides an alternative way to launch the DSE uninstall program. The DSE uninstall program can also be launched from the Add/Remove Programs control panel application, or from the Dialogic DSE-DSLTL start menu item.

To install the Remove tool:

- 1 Click the Remove button on the Setup Maintenance dialog, and click Next.

Result: A Confirm File Deletion window asks you to confirm the deletion.

- 2 Click OK to confirm the deletion.
- 3 Click Finish in the Maintenance Complete window.

DSE Monitor tool Installation

- 1 Open the DSE Monitor Tool folder:

```
\\PEP\Dse\DSEMonitor
```

- 2 Launch the set up program for the DSE monitor tool by double-clicking on:

```
\\PEP\Dse\DSEMonitor\Setup.exe
```

The Welcome to the Installshield Wizard for DSE Monitor Tool window appears.

- 3 Click Next.
- 4 Click next in the Welcome window if all Windows programs have been shut down.
- 5 Click Yes to accept the terms in the Software License agreement window.
- 6 Click Next in the Information window.

The Choose Destination Location window appears.

- 7 Click Browse to create a directory in which to install the DSE Monitor Tool files.

The Choose Directory dialog box appears.

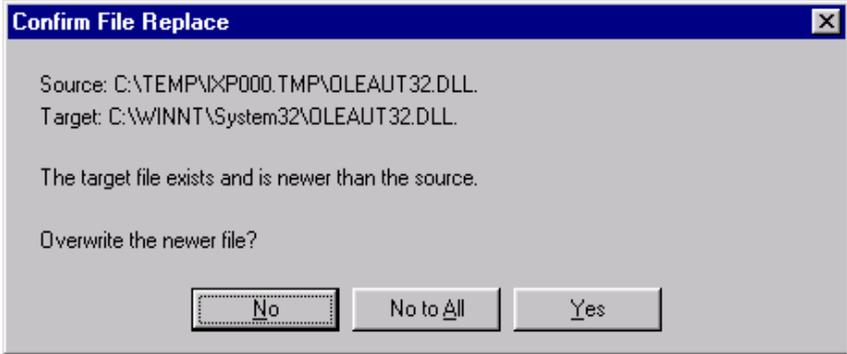
- 8 Enter d:\Program Files\DSE Monitor Tool in the Path field, then click OK.

The Select Program Folder window appears.

- 9 Select the DSE Monitor Tool folder, and click Next.
- 10 In the Start Copying Files window, if the settings are correct, click Next.

- 11 In the Confirm File Replace window, if you are sure you want to overwrite an existing file, click Yes. Otherwise, click No to All.

Note: At the beginning of the installation (when files are first copied to the server) the program may report that it has an older version of a file that already exists on the server. In this case, click on the No to All button, so that any newer files that exist on the server are not replaced with older files from the DSE Monitor Tool installation.



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- 12 Click Finish in the Setup Complete Window.

Uninstalling Intel DSE software

Uninstalling Intel Dialogic DSE-DSLTL software from an existing CallPilot server installation also requires the uninstallation of the CallPilot server software and the DSE Monitor Tool.

Uninstall the existing DSE software

- 1 To uninstall the existing DSE software, select:
Start → Programs → Dialogic DSE-DSLTL → Uninstall.
- 2 The Confirm File Deletion window opens. Click OK to confirm the deletion of the Dialogic DSE-DSLTL software.
- 3 As each Shared File Detected window opens, click Yes to delete the file.
After the shared files are deleted, the Setup Status window displays the progress.
- 4 Click OK in an Uninstall Status window when the message appears that the system is unable to shut down the vbpc service.



g250076

- 5 Reboot the system by clicking OK when the Uninstall Status window recommends a reboot.
- 6 The InstallShield Wizard Complete window asks if you want to reboot again. Check No, I will restart my computer later, then click on Finish.

Uninstall the CallPilot server software

- 7** To uninstall the CallPilot server software, select:
Start → Programs → CallPilot → Uninstall
- 8** Uninstall the CallPilot server software as described in “Uninstalling CallPilot server software” in *Part 4 - Software installation and maintenance*, in the *CallPilot Installation and Configuration* guides.

Uninstall the DSE Monitor Tool

- 9** To uninstall the DSE monitor tool, select:
Start → Settings → Control Panel → Add\Remove Programs.
- 10** Double-click on the DSE monitor tool.
- 11** In the Confirm File Deletion pop-up window, click Yes.
- 12** The Remove Programs From Your Computer displays the status of removing software. When the uninstallation is complete, click OK.
- 13** Click Cancel to exit the Add/Remove window.
- 14** Reboot the server to complete the uninstallation process.

To reinstall CallPilot and Intel DSE software

- 1** Reinstall the CallPilot software. For the procedure, see “Installing the CallPilot server software” in *Part 4 - Software installation and maintenance*, in the *CallPilot Installation and Configuration* guide.
Note: After re-installing CallPilot server software, do not yet run the Configuration Manager or Configuration Wizard in step 2
- 2** Reinstall the DSE software. For the procedure, see “Installing Intel DSE software,” on page 50.
Note: After re-installing Intel DSE software, launch the Configuration Manager and run the Configuration Wizard.

Chapter 5

Configuring the CallPilot server software

In this chapter

Overview	64
Logging on to Windows NT on the CallPilot server	66
Logging on to the CallPilot server with CallPilot Manager	68
Running the Configuration Wizard	73
Changing pcAnywhere caller passwords	75

Overview

Introduction

The Configuration Wizard enables you to configure the CallPilot server software. You can rerun the Configuration Wizard to update or review the server configuration.

The Configuration Wizard is accessible from CallPilot Manager (a Web-based user interface). This chapter describes how to

- log on to Windows NT on the CallPilot server
- log on to the CallPilot server with CallPilot Manager
- run the Configuration Wizard
- change the pcAnywhere caller passwords



CAUTION

Risk of improper configuration

You must use the Configuration Wizard to change the computer name. If you use the Windows NT method to change the computer name, it is not properly updated in the CallPilot software.

Plan your responses to the Configuration Wizard

Ensure you have planned your responses to the Configuration Wizard by completing the “Configuration Wizard worksheet” in Part 1 of the *CallPilot Installation and Configuration* guides.

Online Help for the Configuration Wizard

Each screen in the Configuration Wizard contains a Help button and provides detailed instructions regarding the selection or data entry required. Click Help at any time to get additional instructions.

Running the Configuration Wizard after a board operation

When you perform a board operation such as adding, removing, or replacing a board, you must rerun the Configuration Wizard for the board operation to take affect. Running the Configuration Wizard detects and initializes the hardware. You do not need to change any data in the Configuration Wizard to perform this operation, but you do need to apply the configuration changes as instructed on the last screen of the Configuration Wizard.

Note: To ensure a successful reconfiguration, check the Switch Information configuration page to verify that the serial number of the board is assigned to the correct slot number.

Logging on to Windows NT on the CallPilot server

Introduction

If you want to access CallPilot Manager from the web browser embedded on the CallPilot server, you must first log on to Windows NT on the CallPilot server. Alternatively, you can access CallPilot Manager from any PC that has network access to the CallPilot server.

ATTENTION When logging on, ensure that the CAPS key is not on. The password is case sensitive.

To log on to Windows NT on the CallPilot server

- 1 Ensure that the CallPilot server has started and the Windows NT logon prompt appears.



- 2 Press Ctrl+Alt+Delete.

Result: The Logon Information dialog box appears.



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- 3 Type **Administrator** as the user ID.

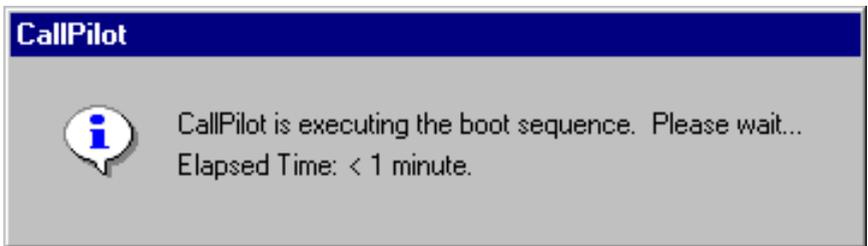
Note: You can choose to log on with a different user ID that has local administrative privileges.

- 4 Type the default password **cpabc123** (or the current Administrator password if it has been changed already).

Note: All passwords to Windows NT accounts should be changed from their default values to strong values known only to the customer. This includes the “gamroot” account used for the AR352 RAID card. CallPilot security is ultimately only as good as the passwords used.

- 5 Click OK.

Note: If the Configuration Wizard has previously been run on the CallPilot server, the following dialog box may appear:



Other dialog boxes may also appear that state if CallPilot is ready to accept calls. These dialog boxes are part of the CallPilot system ready indicator feature and are not applicable until you have run the Configuration Wizard.

Ignore these dialog boxes and continue with “Running the Configuration Wizard” on page 73. See “Checking that CallPilot is ready to accept calls” on page 78 for more information about the system-ready indicator dialog boxes.

Logging on to the CallPilot server with CallPilot Manager

Introduction

You must use a web browser to log on to and administer the CallPilot server.

The logon process is completed in two stages:

1. Launch the web browser (on the CallPilot server, or on any PC that has network access to the CallPilot server).

The web browser on the CallPilot server is configured to automatically connect to the CallPilot Manager web server. If you launch the web browser on a PC, you must specify the URL for the CallPilot Manager web server.

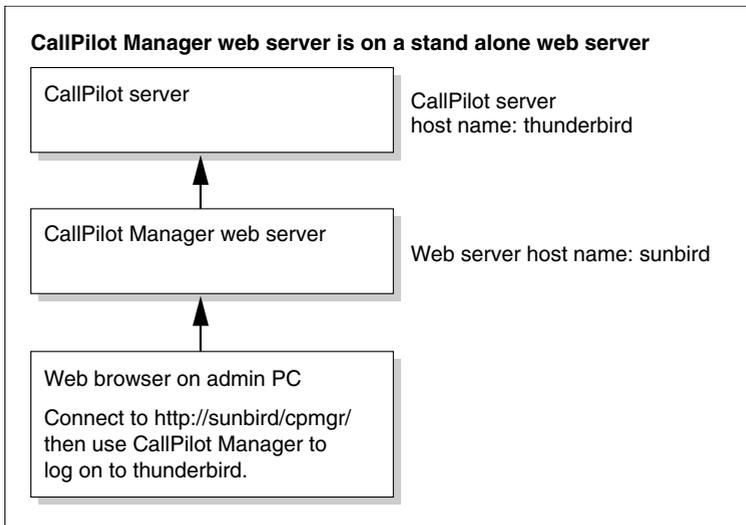
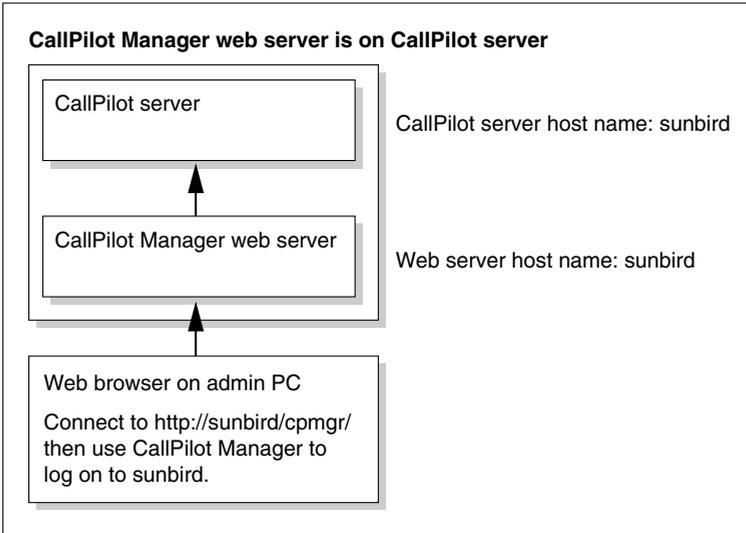
The URL syntax is `http://<web server host name or IP address>/cpmgr/`.

2. Log on to the CallPilot server with an administrator's mailbox number and password.

Relationship of the CallPilot Manager web server to the CallPilot server

The CallPilot Manager web server software can be installed on the CallPilot server, or on a stand-alone server. If the CallPilot Manager web server software is installed on a stand-alone server, you must know the CallPilot Manager server's host name or IP address, as well as the CallPilot server's host name or IP address.

See the following diagrams:



To log on to the CallPilot server

- 1 Launch the web browser on a PC or on the CallPilot server.

IF you are launching the web browser on THEN

the CallPilot server

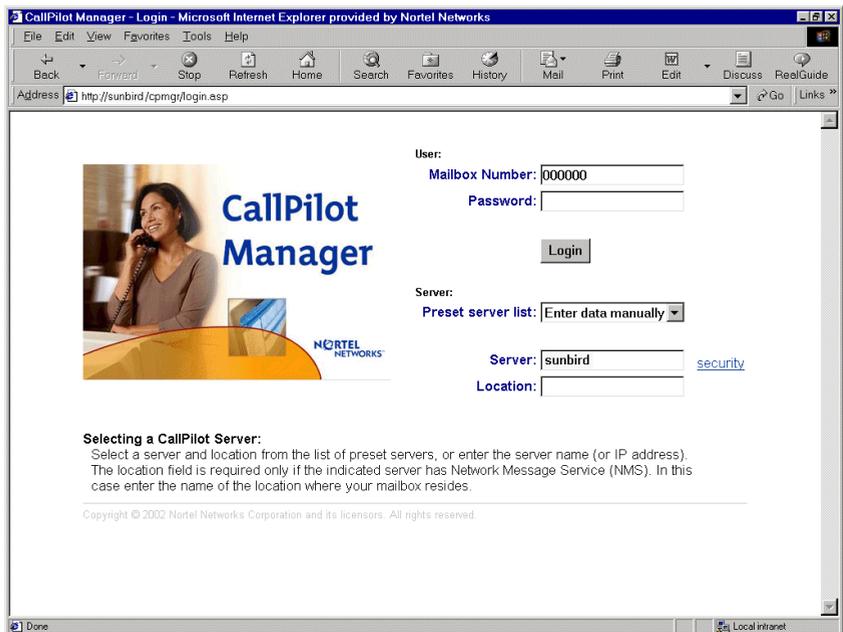
the CallPilot Manager login screen appears automatically. Continue with step 2.

your PC

type the CallPilot Manager web server's URL in the Address or Location box of your web browser, and then press Enter.

Example: `http://sunbird/cpmgr/`

When the connection is established, the CallPilot Manager - Login screen appears. Continue with step .2.



2 Type the administrator mailbox number and password.

The administrator mailbox number is **000000**. The default password is **124578**.

3 Do one of the following:

- Choose a server or location from the list of preconfigured servers or locations in the Preset server list box. Or, choose the Last Server Accessed item.
- Type the CallPilot server's host name or IP address in the Server box.

Note: If you are logging on to the CallPilot server from a PC, type the actual CallPilot server name or IP address in the Server box. If you type *local host* instead of the CallPilot server name or IP address, you cannot establish an Application Builder connection to the CallPilot server from CallPilot Manager or make calls to the phone set to play or record greetings.

- If the CallPilot server that you are connecting to has Network Message Service (NMS) installed, type the CallPilot server's host name or IP address in the Server box, and then type the name of the switch location on which the administration mailbox resides in the Location box.

4 Click Login.

Result: The main CallPilot Manager screen appears.



5 Continue with “Running the Configuration Wizard” on page 73.

Running the Configuration Wizard

Introduction

This section describes how to access and run the Configuration Wizard.

Requirements

- CallPilot language CD, if you are installing, adding, or upgrading languages
- completed “Configuration Wizard worksheet” from Part 1 of the *CallPilot Installation and Configuration* guides
- CallPilot keycode and serial number

To run the Configuration Wizard

ATTENTION

For each screen in the Configuration Wizard, follow the instructions on the screen. Use the information you recorded in the “Configuration Wizard worksheet” in Part 1 of the *CallPilot Installation and Configuration* guides. If you need additional instructions, click Help.

If you are rerunning the Configuration Wizard, some screens may be prefilled. Some screens also contain default values. If the prefilled information does not match the information planned for this server, then update any prefilled values as required.

- 1 Log on to CallPilot Manager. See “Logging on to the CallPilot server with CallPilot Manager” on page 68.
- 2 Click the Configuration Wizard shortcut on the main CallPilot Manager screen, or select Tools → Configuration Wizard.

Result: The Welcome screen of the Configuration Wizard appears.

- 3 Click Next to go to the next screen.
- 4 Read the instructions carefully on each screen. Click Help on the Configuration Wizard screen if you need additional instructions. When you are finished with a screen, click Next to continue.
- 5 When you reach the end of the Configuration Wizard, click Finish to save the Configuration Wizard changes, or click Cancel to discard any changes. No changes are implemented unless you click Finish.

Result: The Configuration Wizard requires up to an hour to apply changes, depending on the number of languages you are installing or updating, and the size of the system. When CallPilot completes the configuration changes, you are prompted to restart the server.

- 6 Restart the server.

Note: Ensure you use the restart procedure documented in Part 1 of the *CallPilot Installation and Configuration* guides.

Result: The server restarts and the configuration changes are in effect.

What's next?

Continue with “Changing pcAnywhere caller passwords” on page 75.

Changing pcAnywhere caller passwords

Introduction

With pcAnywhere, you can perform advanced administrative tasks on the server from a remote PC. You can control the server as though you were directly connected to the server.

One licensed copy of pcAnywhere is provided for the server on the OS Recovery CD (or Upgrade CD). pcAnywhere is installed and configured on the server at the factory.

To install pcAnywhere on another PC, you must purchase a separate license. For instructions on how to install and configure pcAnywhere on another PC, refer to the *Administrator's Guide*.

To simplify the remote logon process, Nortel Networks recommends that you match the pcAnywhere caller password for CallPilotDist to the Nortel Networks user account password for NGenDist. Nortel Networks recommends that you change the pcAnywhere caller CallPilotDist password and the Windows NT NGenDist account password at the same time.

To change pcAnywhere caller passwords

- 1 Stop the pcAnywhere session, if one is running.
- 2 Click Start → Programs → Symantec pcAnywhere.
Result: The pcAnywhere Manager opens.
- 3 Right-click the CallPilot icon, and then select Properties from the pop-up menu.
Result: The “pcAnywhere Host Properties: CallPilot” dialog box appears.
- 4 Click the Callers tab.
- 5 Right-click the CallPilotDist icon, and then select Properties from the pop-up menu.

- 6 In the Password box, type a new CallPilotDist password.
- 7 In the Confirm Password box, type the CallPilotDist password again.
- 8 Click Apply.
- 9 Click OK.
- 10 Click OK to return to the main pcAnywhere Manager screen.
- 11 Double-click the CallPilot icon to restart the pcAnywhere session.

What's next?

Continue with Chapter 6, "Testing the CallPilot installation," on page 77.

Chapter 6

Testing the CallPilot installation

In this chapter

Checking that CallPilot is ready to accept calls	78
Testing the connection to the CLAN	82
Verifying that CallPilot can receive calls	83
Testing the CallPilot software and channels	84

Checking that CallPilot is ready to accept calls

ATTENTION

CallPilot is not ready to accept calls until the CallPilot services are fully operational. CallPilot services require approximately 10 minutes after starting up the CallPilot server to become fully operational.

Introduction

CallPilot uses various system-ready indicators to indicate when it is ready to accept calls, including

- displaying messages in dialog boxes on the CallPilot server monitor after logon; also displays a status icon in the top right corner of the CallPilot Manager screen
- generating events that can be viewed in the Event Browser or Alarm Monitor in CallPilot Manager

The system-ready indicators described in this section appear when you restart the server, and also when CallPilot is running if a change in system readiness status occurs.

The system-ready indicators appear only if the Configuration Wizard has previously been run on the server. The CallPilot server is not ready to accept calls if the Configuration Wizard has not been run.

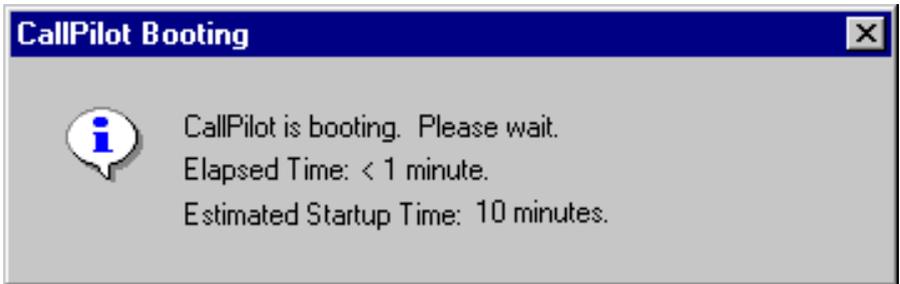
Note: The Configuration Wizard may have been run at the factory or distributor's site prior to shipment to the customer site. If so, then system-ready indicators are visible even the first time you start up CallPilot at the customer site.

Checking system readiness by observing the dialog box messages

A system-ready indicator dialog box appears on the screen any time there is a change in system readiness status. You can close these dialog boxes at any time. If the status changes, a dialog box appears again.

At all times, a system-ready indicator icon appears in the task bar in the bottom right corner of the screen. To view the system-ready indicator dialog box after you close it, double-click the system-ready indicator icon. To view the current status (boot, pass, warn, or fail), place the mouse pointer over the system-ready indicator icon. Help text (roll-over text) appears after a few seconds that states the current status.

Immediately after you log on to the server, the following dialog box appears on the screen if CallPilot services are not yet fully operational. It can take approximately one minute after logon for this dialog box to appear:



The Elapsed Time indicates how much time has passed since the CallPilot application began its boot sequence.

Note: This dialog box may not appear if enough time has passed between starting up the CallPilot server and logging on for CallPilot services to become fully operational. It takes approximately 10 minutes after starting up the CallPilot server for CallPilot services to become fully operational.

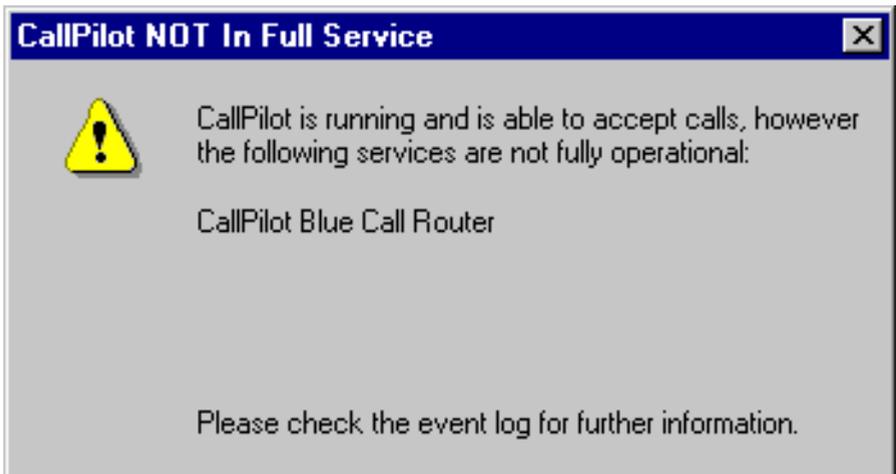
If the CallPilot start sequence is passed successfully (that is, CallPilot services are fully operational), the following dialog box appears:



Click OK to close the dialog box.

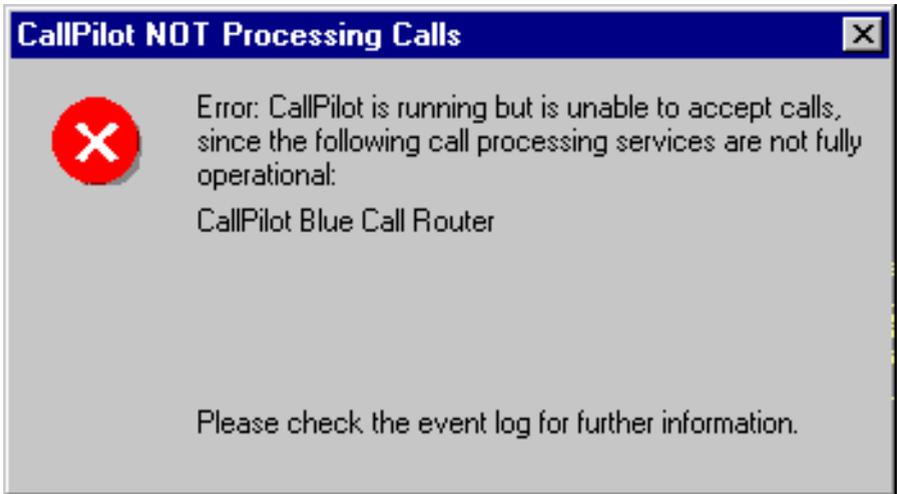
If there are errors, one of the following two dialog boxes appears (depending on the severity of the problem):

Warning message



Close the dialog box by clicking the X in the upper right corner. Check the Event Browser or Alarm Monitor in CallPilot Manager for more details. For instructions, refer to the online Help in CallPilot Manager.

Error message



Close the dialog box by clicking the X in the upper right corner. Check the Event Browser or Alarm Monitor in CallPilot Manager for more details. For instructions, refer to the online Help in CallPilot Manager.

Alternative methods for verifying that CallPilot is ready to accept calls

View events in CallPilot Manager or in the Windows NT Event Viewer on the server

The Pass, Warning, and Error system-ready indicator messages appear as events in the Event Browser and Alarm Monitor in CallPilot Manager, and in the Windows NT Event Viewer on the server.

The Event Browser and Alarm Monitor show only the latest 100 events by default (this default can be adjusted), so it is possible for the system-ready indicator events to be removed from the Event Browser and Alarm Monitor windows.

For detailed instructions on viewing events, refer to the online Help in CallPilot Manager.

Testing the connection to the CLAN

Introduction

This procedure tests the network connection between the server and the Customer LAN (CLAN). This applies only if CallPilot has a CLAN card and is connected to a CLAN.

To test the connection to the CLAN

- 1 Click Start → Programs → Command Prompt.

Result: The Command Prompt screen appears.

- 2 Type **ping** followed by the CLAN IP address of another PC on the CLAN, and then press Enter.

Example: ping 255.255.255.255

Result: The display should indicate a successful ping.

- 3 Type **exit**, and then press Enter to close the Command Prompt screen.

Verifying that CallPilot can receive calls

Introduction

The following procedure is a basic test to verify that CallPilot is able to receive calls from the switch and answer those calls. A more thorough test that requires the use of CallPilot Manager is described in “Testing the CallPilot software and channels” on page 84.

To verify that CallPilot can receive calls

- 1 Ensure that CallPilot services are fully operational before you begin. See “Checking that CallPilot is ready to accept calls” on page 78.
- 2 Dial the main Voice Messaging DN that you defined in the Configuration Wizard.
- 3 Listen for a response from CallPilot (for example, “CallPilot from Nortel Networks...”), and then hang up.

If you do not get a response, then do the following:

- a. Check the cabling between the server and the switch.
- b. Verify that the switch is processing calls to other extensions.
- c. Refer to Part 5 of the *CallPilot Installation and Configuration* guides for troubleshooting instructions.

What’s next?

Continue with “Testing the CallPilot software and channels” on page 84.

Testing the CallPilot software and channels

Introduction

This section includes a series of tests of the CallPilot installation including verifying that

- you can leave a message
- you can retrieve a message

Before you begin

- Ensure that you have configured the switch and CallPilot server, as described in this guide.
- Obtain the Hunt group DNs (primary DNs) for CallPilot.
- Identify a phoneset DN that exists on the switch that you can use for testing.
- Have a pencil and paper ready to record the results of the tests.

To verify that you can leave a message

Complete the following procedures to perform this test:

- “To add a user for testing purposes” on page 85
- “To configure the Voice Messaging DN” on page 86
- “To leave a message” on page 86

To add a user for testing purposes

- 1 Log on to Windows NT on the CallPilot server. See “Logging on to Windows NT on the CallPilot server” on page 66.

Note: Although you can access CallPilot Manager from any PC that has network access to the CallPilot server, later tests require that you be logged on to the CallPilot server.

- 2 Log on to CallPilot Manager. See “Logging on to the CallPilot server with CallPilot Manager” on page 68.
- 3 Click Users → Add User.

Result: The Express Add screen appears.

- 4 Type the required information. Each required field is marked with an asterisk (*). Accept the default values for other fields.

For example, create a user named TEST USER.

ATTENTION

The tests in this section use the mailbox number 8050 as an example. Ensure that you specify a DN that is defined on the switch.

- 5 Click Advanced User Add.

Result: The Advanced User Add screen appears, and the information you have already entered appears.

- 6 Scroll down to the Security section of the screen and specify a mailbox password. Write down the password. Leave all other fields at their default values.
- 7 Click Express Add.

Result: The Express Add screen appears.

- 8 Click Add.

Result: CallPilot Manager displays a summary of the user just added.

To configure the Voice Messaging DN

Note: If you have already configured a Voice Messaging DN in the Configuration Wizard, then you can skip this procedure. If you are not sure, continue with this procedure to verify that a Voice Messaging DN is present, or to configure one if necessary.

- 1 Click System → Service Directory Number.

Result: The Service Directory Number screen appears.

- 2 Click New.

Result: The SDN Detail screen appears.

- 3 In the Service DN box, type the primary Voice Messaging DN for CallPilot.

Note: If there are no voice channels installed on CallPilot, then use the fax or speech recognition primary DN as the Voice Messaging DN for these tests. You can still use the Voice Messaging application as described in this procedure.

- 4 In the Application Name box, select Voice Messaging.

- 5 In the Media Type box, select Voice.

Note: If there are no voice channels installed on CallPilot, then select Fax or Speech Recognition based on the DN that you specified in step 3.

- 6 Click Save.

To leave a message

- 1 From any active phoneset that is connected to the switch, dial the Voice Messaging Service DN that you have just created.

Result: CallPilot plays the following prompt: “Nortel CallPilot. Mailbox?”

Note: If CallPilot does not answer the call or you do not hear a prompt, then check that the call channels and multimedia channels are in idle state.

- 2 Enter the mailbox number followed by number sign (#) (for example, 8050#).

Result: CallPilot plays the following prompt: *Password?*

- 3 Enter the mailbox password **135246#**.

Result: CallPilot plays the following prompt: *The temporary password assigned by your administrator must be changed. To access your mailbox, please press 84 and change your password.*

- 4 Press **84**.

Result: CallPilot plays the following prompt: *Password change. To authorize the change, please enter your old password followed by number sign.*

- 5 Enter **135246#**.

Result: CallPilot plays the following prompt: *Please enter your new password followed by number sign.*

- 6 Enter a new mailbox password followed by number sign (#) (for example, 805011#).

Result: CallPilot plays the following prompt: *Please enter your new password again followed by number sign.*

- 7 Enter the new mailbox password again to confirm (for example, 805011#).

Result: CallPilot plays the following prompt: *Your password has been changed. Your mailbox is empty.*

- 8 Press **75** to compose a message.

Result: CallPilot plays the following prompt: *Compose...*

- 9 Enter the mailbox number, followed by number sign (#) twice (for example, 8050##).

Result: CallPilot plays the following prompt: *To begin recording, Press 5. To end recording, press number sign.*

- 10 Press **5** to record a message. Record a message, and then press number sign (#) to stop.

Result: CallPilot plays the following prompt: *Recording Stopped. There is a brief pause, followed by the prompt: To review the message, press 2, to send it, press 79...*

11 Press **79** to send the message.

Result: CallPilot plays the following prompt: *Message sent and deleted.*

12 Press **83**, and then hang up the phone.

13 Verify that the Message Waiting Indicator (MWI) is on.

To verify that you can retrieve a message

1 Pick up the telephone handset and dial the same Voice Messaging Service DN again.

2 When prompted, enter the mailbox number where the message was left (for example, 8050#).

Result: CallPilot plays the following prompt: *Password?*

3 Enter the mailbox password (for example, 805011#).

Result: CallPilot plays the following prompt: *You have one new message. Message one. New. From....*

ATTENTION

If you do not hear the exact message, *You have one new message...*, this indicates that the wrong prompts have been installed or that CallPilot did not install properly.

If you did not hear the correct message, contact your Nortel Networks customer support representative.

4 Press **2** to play the message, and then listen to it.

5 Press **76** to delete the message.

Result: CallPilot plays the following prompt: *Message 1 deleted.*

ATTENTION

If you do not hear the exact message, *Message 1 deleted*, this indicates that the wrong prompts have been installed or that CallPilot did not install properly.

If you do not hear the correct message, contact your Nortel Networks customer support representative.

- 6 Press **83** and then hang up the phone.

To test call channels and voice channels

Note: If CallPilot has no voice channels, go to “To test call channels and fax channels” on page 91. If CallPilot also has no fax channels, go to “To test call channels and speech recognition channels” on page 93.

- 1 In CallPilot Manager, click System → Service Directory Number.

Result: The Service Directory Number screen appears.

- 2 In the earlier tests, you created a Voice Messaging Service DN. Ensure that the Voice Messaging Service DN is Primary hunt group DN for the Voice hunt group.

Note: If the Voice Messaging Service DN is not set properly, then select the defined Service DN and click File → Properties. Make the required changes, and then click Save.

- 3 In the Application Name box, ensure that Voice Messaging is selected.
- 4 In the Media Type box, ensure that Voice is selected.
- 5 Click Maintenance → Multimedia Monitor.

Result: The Multimedia Monitor appears.

- 6 Select and start a maximum of 8 voice channels for testing.

Note: Nortel Networks recommends that you test a maximum of 8 voice channels at one time. For example, if you have a 96-channel system, start only 8 voice channels. When those 8 voice channels are tested, stop them and start another set of voice channels.

- 7 Stop all fax and speech recognition channels, if these channels are present.
- 8 Verify that all voice channels are in Idle state.
- 9 In CallPilot Manager, click Maintenance → Channel Monitor.

Result: The Channel Monitor appears.

- 10 Select the whole system and stop all channels.

- 11 Select and start the same number of call channels as voice channels that you have started. For example, if you have started 8 voice channels, then start 8 call channels. The 8 call channels belong to the primary hunt group.
- 12 On the CallPilot server desktop, click Start → Programs → CallPilot → System Utilities → System Monitor.
Result: The CallPilot System Monitor screen appears. By default, the Channel Monitor tab appears on top.
- 13 Observe the System Monitor screen and verify that all the required multimedia (DSP) and call channels are in Idle state, and that all other channels are Off Duty (out of service).
- 14 Use a telephone to dial the call channels that you started. To find the DN for the call channels, move the mouse to the call channel in the channel monitor or system monitor.
- 15 Verify that CallPilot answers the call and that the CallPilot greeting plays.
- 16 Observe the System Monitor and record which call channel and which voice channel changes to Active state.
- 17 Hang up the telephone.
- 18 Repeat steps 14 to 17 until all the selected voice and call channels are tested.
Note: If the calls are not cycling through all voice and call channels, then stop the tested voice and call channels. This forces the next call to go to the untested voice and call channels. When you stop the channels, there may be a short delay before the channels go to Off Duty state. This is because stopped channels go to a 1 minute standby mode so they are ready for the next call.
- 19 Stop the voice and call channels that have been tested. Then repeat steps 5 to 18 until all voice channels and the same number of call channels are tested.

To test call channels and fax channels

Note: If CallPilot has no fax channels, go to “To test call channels and speech recognition channels” on page 93.

- 1 In CallPilot Manager, click System → Service Directory Number.

Result: The Service Directory Number screen appears.

- 2 In the Service Directory Number screen, click the Voice Messaging Service DN that you have been using for testing.

Result: The SDN Detail screen appears showing the properties of the Voice Messaging Service DN.

- 3 In the Service DN box, enter the Primary hunt group DN for the Fax hunt group.

- 4 In the Media Type box, select Fax.

Note: You can leave the Application Name as Voice Messaging.

- 5 Click Save.

- 6 Click Maintenance → Multimedia Monitor.

Result: The Multimedia Monitor appears.

- 7 In the Multimedia Monitor screen, select and start a maximum of 8 fax channels for testing.

Note: Nortel Networks recommends that you test a maximum of 8 fax channels at one time. For example, if you have a 96-channel system, start only 8 fax channels. When those 8 fax channels are tested, stop them and start another set of fax channels.

- 8 Stop all voice and speech recognition channels, if these channels are present.

- 9 Verify that all fax channels are in Idle state, and leave the Multimedia Monitor screen open so that you can observe when channels change to Active state.

- 10 In CallPilot Manager, click Maintenance → Channel Monitor.

Result: The Channel Monitor appears.

- 11 Select the whole system and stop all channels.

12 Select and start the same number of call channels as fax channels that you have started. For example, if you have started 8 fax channels, then start 8 call channels. The 8 fax channels belong to the primary hunt group with fax media type.

Note: Ensure you select and start call channels that have not already been tested (for example, as part of the voice channel test).

13 On the CallPilot server desktop, click Start → Programs → CallPilot → System Utilities → System Monitor.

Result: The CallPilot System Monitor screen appears. By default, the Channel Monitor tab appears on top.

14 Observe the System Monitor screen and verify that all the required multimedia (DSP) and call channels are in Idle state, and that all other channels are Off Duty (out of service).

15 Use a telephone to dial the service DN that you started. Use a telephone to dial the fax channels that you started. To find the DN for the call channels, move the mouse to the call channel in the channel monitor or system monitor.

16 Verify that CallPilot answers the call and that the CallPilot greeting plays.

17 Observe the System Monitor and record which call channel and which fax channel changes to Active state.

18 Hang up the phone.

19 Repeat steps 15 to 18 until all the selected fax and call channels are tested.

Note: If the calls are not cycling through all fax and call channels, then stop the tested fax and call channels. This forces the next call to go to the untested fax and call channels. When you stop the channels, there may be a short delay before the channels go to Off Duty state. This is because stopped channels go to a 1 minute standby mode so they are ready for the next call.

20 Stop the fax and call channels that have been tested. Then repeat steps 6 to 19 until all fax channels and the same number of call channels are tested.

To test call channels and speech recognition channels

- 1 In CallPilot Manager, click System → Service Directory Number.

Result: The Service Directory Number screen appears.

- 2 In the Service Directory Number screen, click the Voice Messaging Service DN that you have been using for testing.

Result: The SDN Detail screen appears showing the properties of the Voice Messaging Service DN.

- 3 In the Service DN box, enter the Primary hunt group DN for the Speech Recognition hunt group.

- 4 In the Media Type box, select Speech Recognition.

Note: You can leave the Application Name as Voice Messaging.

- 5 Click Save.

- 6 Click Maintenance → Multimedia Monitor.

Result: The Multimedia Monitor appears.

- 7 In the Multimedia Monitor screen, select and start a maximum of 8 speech recognition channels for testing.

Note: Nortel Networks recommends that you test a maximum of 8 speech recognition channels at one time. For example, if you have a 96-channel system, start only 8 speech recognition channels. When those 8 speech recognition channels are tested, stop them and start another set of speech recognition channels.

- 8 Stop all fax and voice channels, if these channels are present.

- 9 Verify that all speech recognition channels are in Idle state, and leave the Multimedia Monitor screen open so that you can observe when channels change to Active state.

- 10 In CallPilot Manager, click Maintenance → Channel Monitor.

Result: The Channel Monitor appears.

- 11 Select the whole system and stop all channels.

12 Select and start the same number of call channels as speech recognition channels that you have started. For example, if you have started 8 speech recognition channels, then start 8 call channels. The 8 speech recognition call channels belong to the primary hunt group with speech recognition media type.

Note: Ensure you select and start call channels that have not already been tested (for example, as part of the voice or fax channel test).

13 On the CallPilot server desktop, click Start → Programs → CallPilot → System Utilities → System Monitor.

Result: The CallPilot System Monitor screen appears. By default, the Channel Monitor tab appears on top.

14 Observe the System Monitor screen and verify that all the required multimedia (DSP) and call channels are in Idle state, and that all other channels are Off Duty (out of service).

15 Use a telephone to dial the service DN that you entered in the SDN table. Use a telephone to dial the speech recognition call channels that you started. To find the DN for the call channels, move the mouse to the call channel in the channel monitor or system monitor.

16 Verify that CallPilot answers the call and that the CallPilot greeting plays.

17 Observe the System Monitor and record which call channel (on the Channel Monitor screen) and which speech recognition channel (on the Multimedia Monitor screen) changes to Active state.

18 Hang up the phone.

19 Repeat steps 15 to 18 until all the selected speech recognition and call channels are tested.

Note: If the calls are not cycling through all speech recognition and call channels, then stop the tested speech recognition and call channels. This forces the next call to go to the untested speech recognition and call channels. When you stop the channels, there may be a short delay before the channels go to Off Duty state. This is because stopped channels go to a 1 minute standby mode so they are ready for the next call.

- 20 Stop the speech recognition and call channels that have been tested. Then repeat steps 6 to 19 until all speech recognition channels and the same number of call channels are tested.

To restore the SDN Table and put all channels back in service

- 1 In CallPilot Manager, click System → Service Directory Number.

Result: The Service Directory Number screen appears.

- 2 In the Service Directory Number screen, select the check box for the Voice Messaging Service DN that you have been using for testing.

- 3 Click Delete Selected.

Result: The Service DN is deleted.

Note: If you are ready to begin CallPilot administration, you can choose to keep this Service DN. However, ensure that the Service DN is configured as required for normal operation. For example, do not leave the Service DN set to the Primary hunt group DN.

- 4 In CallPilot Manager, click Maintenance → Channel Monitor.

Result: The Channel Monitor appears.

- 5 In the Channel Monitor screen, select the whole system and start all channels.

- 6 Verify that all call channels are in Idle state.

- 7 Click Maintenance → Multimedia Monitor.

Result: The Multimedia Monitor appears.

- 8 In the Multimedia Monitor screen, select the whole system and start all channels.

- 9 Verify that all multimedia channels are in Idle state.

Result: The CallPilot tests are completed.

What's next

Once your testing indicates that the server upgrade, new installation and configuration, platform migration, or system rebuild is successful, perform a full system backup. Refer to Chapter 8, “Backing up and restoring CallPilot information” of the *Administration Guide* for more information.

Index

Numerics

- 703t
 - network diagram 17

A

- adding a user 85

B

- boards
 - DSE 18
 - MPB96 18
 - table of required components 34
- boards, replacement
 - detecting 65

C

- call channels
 - test 89, 91, 93
- call dropped 32
- call routing
 - diagram 26
 - primary hunt groups 20
 - secondary queues 21
- CallPilot
 - verifying that services are fully operational 78
- CallPilot components
 - CallPilot server 18

- DSE board 18
- H.100 bus 18
- modem 18
- MPB96 board 18
- table of required components 34
- CallPilot Manager 70
 - viewing events 81
- CallPilot server 18
 - log on instructions 70
- CallPilot server and DSE boards
 - connecting 34
- CallPilot software
 - testing 84
- calls, verification 83
- channels
 - back in service 95
 - testing 84
- checklists
 - installation and configuration checklist 11
 - PBX system configuration 40
- CLAN
 - connection test 82
- Configuration Wizard 78
 - online help 65
 - overview 64
 - running 73
 - using to detect replacement boards 65
- configuring
 - CallPilot 64
 - digital sets on the PBX 42
 - the PBX switch 40

D

- desktop client PCs 18
- diagrams
 - call routing 26
 - high level view of PBX programming 41
 - network, 703t server 17
- Digital Set Emulation
 - PCI-16 18
- digital sets, creating/configuring 42
- DSE board 18
- DSE software, installation
 - DSE Monitor Tool 58
 - fresh installation 50
 - update/recovery 50, 55

F

- fax channels 91

H

- H.100 bus 18
- hunt groups 20, 45
 - primary 20

I

- inbound SDN 24
- installation and configuration checklist 11

L

- logging on to CallPilot server 66
- logging on to Windows NT 66

M

- message

- leaving 86
- retrieving 88
- Message Waiting Indicator DN (MWI) 44
- Modem 18
- MPB96 board 18
- MPUs 30
- multimedia channel
 - definition 30
 - how acquired from ACD queue 31
 - types 30
- multimedia channels
 - caller acquired 31
- multimedia channels, idle 31
- multimedia channels, not idle 31
- MWI 44

O

- outbound SDN 24

P

- password
 - pcAnywhere 75
- PBX switch
 - configuration task checklist 40
- pcAnywhere caller passwords
 - changing 75
- PCs
 - desktop client 18
- ping command 82
- primary hunt group 20

S

- SDN
 - inbound SDN 24
 - outbound SDN 24
 - Table controls 23
 - See* Service Directory Number (SDN)
- SDN Table

- restoring 95
- secondary queues 21
 - setting up secondary queues 46
- Service Directory Number (SDN)
 - overview 23
 - types 23
- setting up primary hunt groups 45
- speech recognition channels 93
- subscriber sets, programming 47
- system readiness
 - checking 79
- system-ready indicators 78

T

- testing
 - adding a user for 85
 - testing call channels 89, 91, 93
 - testing fax channels 91
 - testing speech recognition channels 93
 - testing voice channels 89

V

- verifying that CallPilot services are fully operational 78
- Voice bus 18
- voice channels 89
- Voice Messaging DN
 - configuring 86

W

- Windows NT
 - viewing events 81

CallPilot

Installation and Configuration

Part 3: DSE and CallPilot Server Configuration

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Publication number:	555-7101-223
Product release:	2.5
Document release:	Standard 2.0
Date:	April 2004

Printed in Canada

