



Nortel CallPilot

Installation and Configuration Task List

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CallPilot 3.0, Standard 1.0; *CallPilot Installation and Configuration, Installation and Configuration Task List*; title of book changed; revisions for change of operating system from Windows NT to Windows 2003; modifications to the procedures for restarting, shutting down, and starting up the CallPilot server; reorganized to provide overview task lists for installing, configuring, administering and maintaining the CallPilot system and Desktop Messaging software; now contains information that appeared formerly in both the *Part 1: Installation and Maintenance Overview* and the *Installation and Configuration Planner*, which are discontinued.

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Release 2.5, Standard 1.0 of *CallPilot Installation and Configuration, Part 1: Installation and Maintenance Overview*; overview procedures modified (addition of Intel board install step and single point grounding info); EMC warning for the 1002rp server in the Site inspection checklist and customer-supplied items checklist; settings for the DSE and SL-100*/DMS-100* on worksheet.

October 2002

Standard 1.0 of *CallPilot Installation and Configuration, Part 1: Installation and Maintenance Overview* is released for CallPilot 2.0 general availability.

November 2000

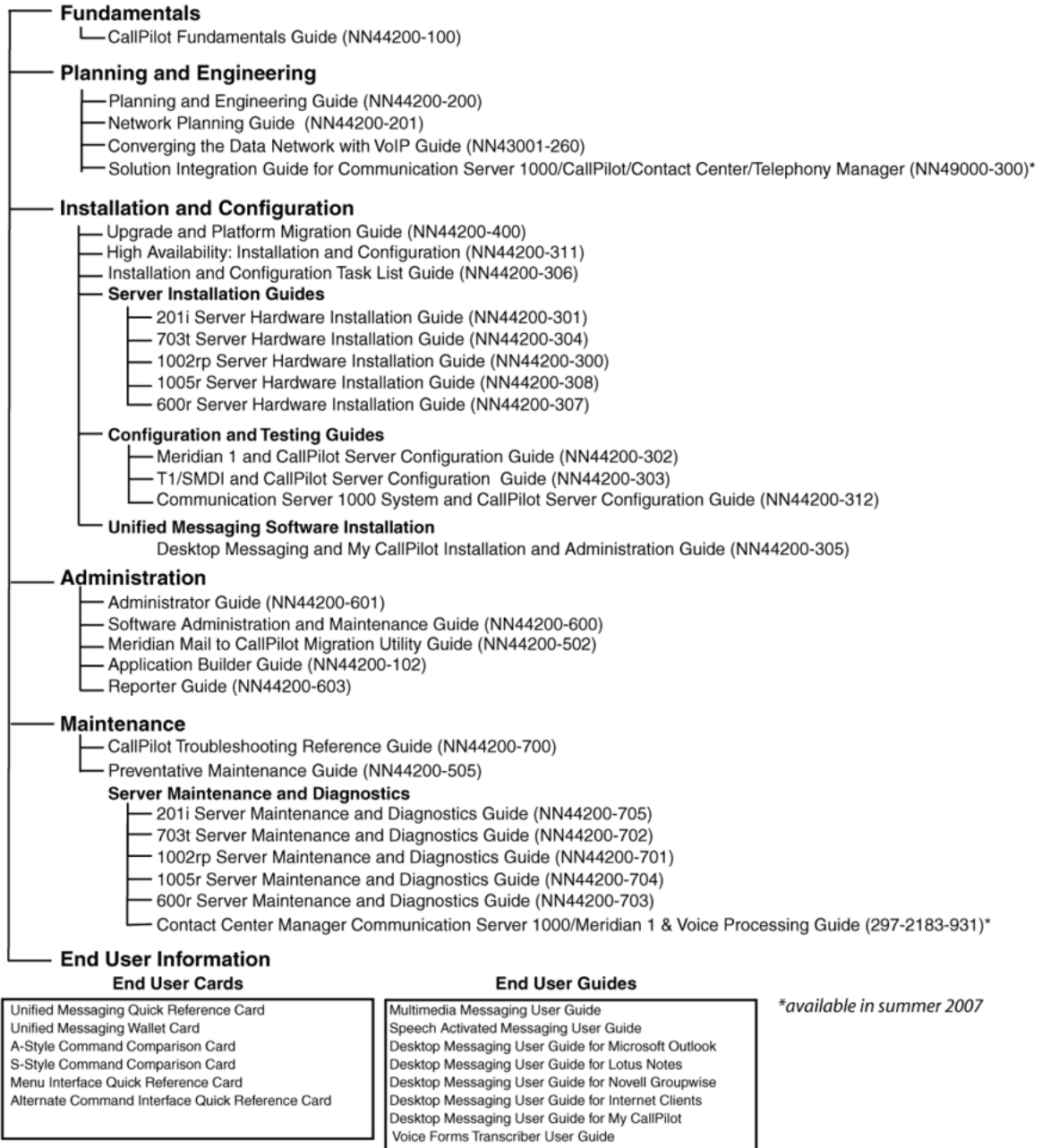
Standard 2.0 of *CallPilot Installation and Configuration, Part 1: Installation Flowchart and Worksheets* is released for CallPilot 1.07.

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Standard 1.0 of *CallPilot Installation and Configuration, Part 1: Installation Flowchart and Worksheets* is released for CallPilot 1.07.



CallPilot Customer Documentation Map



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Chapter 1

How to get help

This section explains how to get help for Nortel products and services.

Getting Help from the Nortel Web site

The best way to get technical support for Nortel products is from the Nortel Technical Support Web site:

<http://www.nortel.com/support>

This site provides quick access to software, documentation, bulletins, and tools to address issues with Nortel products. More specifically, you can:

- download software, documentation, and product bulletins
- search the Technical Support Web site and the Nortel Knowledge Base for answers to technical issues
- sign up for automatic notification of new software and documentation for Nortel equipment
- open and manage technical support cases

Getting Help over the phone from a Nortel Solutions Center

If you do not find the information you require on the Nortel Technical Support Web site, and have a Nortel support contract, you can also get help over the phone from a Nortel Solutions Center.

In North America, call 1-800-4NORTEL (1-800-466-7835).

Outside North America, go to the following Web site to obtain the phone number for your region:

<http://www.nortel.com/callus>

Getting Help from a specialist by using an Express Routing Code

To access some Nortel Technical Solutions Centers, you can use an Express Routing Code (ERC) to quickly route your call to a specialist in your Nortel product or service. To locate the ERC for your product or service, go to:

<http://www.nortel.com/erc>

Getting Help through a Nortel distributor or reseller

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

Chapter 2

CallPilot installation and configuration

This chapter contains information on the following topics:

["Where to start" \(page 13\)](#)

["Related information" \(page 14\)](#)

Where to start

The *CallPilot Installation and Configuration Task List* provides an overview of the installation of the CallPilot* system hardware and software:

- The primary purpose of the task list guide is to provide a road map for installing a new system.
- The task list guide describes additional system tasks that can be performed during the initial installation of the system or after a system is installed.

Note: General references to hardware installation, configuration, and maintenance guides that use a model number or name in the title use the following convention:

- *<server_model> Hardware Installation*
(for example, *1002rp Hardware Installation*)
- *<server_model> Server Maintenance and Diagnostics*
(for example, *1002rp Server Maintenance and Diagnostics*)
- *<switch_model> and CallPilot Server Configuration*
(for example, *Meridian 1* and CallPilot Server Configuration*)

Note: To comply with the EU (European Union) RoHS directive, some of the part numbers now contain an E5 or E6 suffix. For example, part

number NTRH2014 is now NTRH2014E6. The part numbers in this guide do not contain the suffix.

Installing a new system

For a new CallPilot installation, see [Chapter 3 "Installing a new CallPilot server" \(page 17\)](#).

The checklists and worksheets required for the installation are in [Appendix "Installation preparation checklists" \(page 75\)](#) and [Appendix "Configuration worksheets" \(page 89\)](#).

Additional system tasks during or after installation

Additional system tasks include migrating data, expanding CallPilot features, and installing additional software components, such as the Application Builder and Desktop Messaging software.

Note 1: System upgrade tasks are not described in the *Installation and Configuration Task List*. For a general description of upgrades and where to find the procedures, see [Chapter 4 "Upgrading CallPilot" \(page 27\)](#).

Note 2: [Chapter 10 "Starting up and shutting down the CallPilot server" \(page 51\)](#) appears in the guide for reference during the initial installation. These tasks are also used in maintenance operations where the server must be shut down, restarted, or powered up.

Related information

The following information can be useful for CallPilot installation and configuration.

CallPilot Fundamentals Guide

For more information about the following topics, see the *CallPilot Fundamentals Guide* (NN44200-100):

- safety guidelines
- skills required
- symbols and conventions
- obtaining CallPilot technical documents
- accessing CallPilot online Help

CallPilot guides

CallPilot installation, configuration, administration, and maintenance guides are stored on the CD-ROM supplied with your system. For a list of CallPilot documentation, see the [CallPilot Customer Documentation Map](#).

Online Help for CallPilot Manager and My CallPilot is available after installation and provides online access to the guides.

Contacting technical support

Contact your channel partners to get help with troubleshooting your system.

Chapter 3

Installing a new CallPilot server

This chapter contains information on the following topics:

"Overview of installation tasks" (page 17)

"Preparing to install the CallPilot server" (page 19)

"Installing the CallPilot server" (page 21)

"Connecting the switch to the CallPilot server" (page 22)

"Configuring the switch and CallPilot server" (page 22)

"Testing CallPilot connectivity, services, and channels" (page 23)

"Other administrative tasks" (page 24)

"Desktop Messaging and My CallPilot installation tasks" (page 26)

Overview of installation tasks

The installation checklists in this chapter describe how to install a new CallPilot server. The tasks are presented in the order that can be completed.

Note: This document does not cover the installation and configuration of a High Availability system. See the *High Availability Installation and Configuration Guide* (NN44200-311) for the High Availability installation and configuration task list.



CAUTION

Risk of software malfunction

Do not install software that is not provided with CallPilot. Software that is not approved by Nortel is not supported and can cause CallPilot to malfunction.

For information about non-CallPilot software supported by Nortel, see the *CallPilot Distributor Technical Reference* (DTR).

ATTENTION

Meridian 1 and CS 1000:

For important considerations about using the ELAN subnet in your network, see the section about the ELAN subnet for Meridian 1 and CS 1000, in the *CallPilot Planning and Engineering Guide* (NN44200-200).

ATTENTION

This is not a system recovery procedure. To perform a system recovery, see the section about recovering a system in the *CallPilot Software Administration and Maintenance Guide* (NN44200-600).

Before you begin

Before installing CallPilot hardware and software, become familiar with the following information:

- [Appendix "Installation preparation checklists" \(page 75\)](#)
- [Appendix "Configuration worksheets" \(page 89\)](#)
- CallPilot system information, such as safety guidelines described in the *CallPilot Fundamentals Guide* (NN44200-100)
- installation background information described in the *CallPilot Planning and Engineering Guide* (NN44200-200) such as requirements for using the Embedded LAN (Meridian 1 and CS 1000)
- a high-level diagram of how CallPilot fits into your network in the server description section in the *CallPilot <server_model> Server Hardware Installation* guide for your server (for example, the *CallPilot 201i Server Hardware Installation Guide* NN44200-301)
- an overview of switch programming and call routing in the *<switch_model> and CallPilot Server Configuration* guide for your switch and server (for example, the *Meridian 1 and CallPilot Server Configuration Guide* NN44200-302)

Note: For information and procedures about installing Desktop Messaging and My CallPilot software, see the *Desktop Messaging and My CallPilot Installation and Administration Guide* (NN44200-305).

Preparing to install the CallPilot server

Step	Description	Time required	Check
1	Verify that the customer site is clean, properly laid out, and equipped. Complete the "Site inspection checklist" (page 75).	5 minutes, if the site meets all of the requirements	☐
2	Ensure that you have the information and tools required to install the hardware: - Obtain the necessary network configuration information from the customer's network administrator. For the CallPilot server — unique computer names — IP addresses — subnet masks (NNS subnet and ELAN subnet) — default gateway (NNS Subnet) Direct inward dial (DID) numbers on the switch. Record this information on the following worksheets, as required: — "Switch or system configuration worksheet" (page 90) — "Configuration Wizard worksheet" (page 92) - Gather the necessary equipment, tools, and materials and complete the checklists: — "Required tools and materials" (page 78) — "Customer-supplied items checklist" (page 79)	10 minutes, if you have all of the items you need	☐

Step	Description	Time required	Check
3	Unpack the server and supplied equipment, software, and documentation. Verify the items received against the Nortel packing list to ensure that you received the correct equipment. Ensure also that the serial number and keycode match, and that all hardware is in good condition. Complete the following checklists to ensure that you have all the components that you ordered: • "CallPilot server hardware checklist" (page 81) • "CallPilot software media and documentation checklist" (page 84)	30 minutes	☐
4	Inspect the server. Report any damage or missing components to Nortel.	10–30 minutes (based on your server model)	☐
5	For tower or rackmount servers, review the slot and IRQ assignment information provided in the <i>CallPilot <server_model> Server Hardware Installation</i> guide for your server. You need the slot assignment information later in the installation. If you experience problems with the server, you may need the IRQ information for troubleshooting.	10 minutes	☐
6	Review the "Network connectivity" section in the <i>CallPilot <server_model> Server Hardware Installation</i> guide for your server. This section provides an overview of how the CallPilot server is connected to the customer network.	5 minutes	☐
7	If not already completed, fill out the configuration worksheets in Appendix "Configuration worksheets" (page 89): • the "Switch or system configuration worksheet" (page 90) • the CallPilot server "Configuration Wizard worksheet" (page 92)	20 minutes, if you have all of the information you need	☐

Installing the CallPilot server

For instructions about installing the CallPilot server, see the *CallPilot <server_model> Server Hardware Installation* guide for your server.

Step	Description	Time required	Check
1	If your server is a 1002rp, install the power supply modules.	2 minutes	☐
2	If the 19-inch rack is not already installed, install it now. For instructions, see the rack documentation. ATTENTION If applicable, ensure that the rack meets seismic bracing requirements. For more information, see the documentation for your switch or system.	Based on rack, location, and connections: 1 to 4.5 hours	☐
3	Place the server hardware and peripheral devices in the location chosen for the server.	5 minutes, if you unpacked the items in the chosen location	☐
4	Connect peripheral devices to the server. Peripheral devices include the following items, based on your server platform: - external modem for remote access - ELAN switch (layer 2) or Ethernet switch or hub (Meridian 1 or CS 1000 only) - Nortel Server Subnet (also known as CLAN) Ethernet switch or hub (optional) Note: To reduce the risk of infection from this network, do not connect CallPilot to the optional Nortel server subnet or CLAN before antivirus programs and Nortel security updates are installed. - external tape and CD-ROM/DVD drives (201i server only) - external SLR75 tape drive for the 1005r and the 600r servers - monitor, keyboard, and mouse - software feature key adapter (tower and rackmount platforms only) or USB adaptor (600r and 1005r)	30 minutes	☐
5	Power up the server.	Based on your server model	☐

Connecting the switch to the CallPilot server

For instructions about connecting and configuring the server and switch, see the *<switch_model> and CallPilot Server Configuration* guide for your switch and server.

Step	Description	Time required	Check
1	For tower and rackmount platforms only: install the connectivity hardware for connecting the CallPilot server to the switch. - For Meridian 1 and CS 1000, install the MGate card in the switch. - For T1/SMDI switches, install T1 and SMDI devices (such as T1 line side cards and an SMDI IOC shelf).	15 minutes	☐
2	Connect the CallPilot server to the switch as described in the <i><switch_model> and CallPilot Server Configuration</i> guide for your switch and server.	15 minutes	☐

Configuring the switch and CallPilot server

Step	Description	Time required	Check
1	Configure the switch. For switch configuration information, see the "Switch or system configuration worksheet" (page 90) provided in the Appendix "Configuration worksheets" (page 89). For instructions, see configuring the switch or system in the <i><switch_model> and CallPilot Server Configuration</i> guide for your switch and server.	30 minutes	☐

Step	Description	Time required	Check
2	Log on to the CallPilot server. The setup wizard automatically launches and guides you through a number of setup steps prior to configuring your system. Use CallPilot Manager to log on to the server. Run the Configuration Wizard to configure the CallPilot server and change the operating system passwords. For server configuration information, see the "Configuration Wizard worksheet" (page 92) provided in the Appendix "Configuration worksheets" (page 89). For log on and configuration instructions, see: - configuring CallPilot server software in the <i><switch_model> and CallPilot Server Configuration</i> guide for your switch and server - online Help for the Configuration Wizard	20 minutes, plus up to 1 hour to apply the changes	☐
3	Restart the server and ensure that it can start CallPilot. For instructions, see "Restarting the server" (page 54).	Based on your server model, at least 10 minutes	☐
4	Change the CallPilotDist password for pcAnywhere (note: pcAnywhere is not used with the 201i). Note: Record the new passwords on the "Configuration Wizard worksheet" (page 92) and "pcAnywhere password" (page 94). For information about changing the pcAnywhere password, see the <i><switch_model> and CallPilot Server Configuration</i> guide for your switch and server.	5 minutes	☐

Testing CallPilot connectivity, services, and channels

For instructions, see "Testing the CallPilot installation" in the *<switch_model> and CallPilot Server Configuration* guide for your switch and server.

Step	Description	Approximate time required	Check
1	Check CallPilot system ready indicators to see if CallPilot is ready to accept calls.	10 minutes	☐

Step	Description	Approximate time required	Check
2	Test the connection to the ELAN subnet, if applicable.	1 minute, if the ping is successful	☐
3	Test the connection to the Nortel Server Subnet (NS, also known as CLAN) Ethernet switch or hub.	1 minute, if the ping is successful	☐
4	Verify that CallPilot answers when you dial the Voice Messaging DN.	5–10 minutes, if the test is successful	☐
5	Verify network connectivity to the CallPilot server by using a Web browser to log on to the CallPilot server.	5 minutes	☐
6	Verify that you can leave a message. Note: This task includes the first-time configuration of a Voice Messaging DN and test mailbox.	25 minutes	☐
7	Verify that you can retrieve a message.	2 minutes	☐
8	Verify that each call channel and multimedia channel is functioning correctly.	2 hours	☐

Other administrative tasks

Step	Description	Time required	Check
1	For tower or rackmount servers: Create or update the emergency repair disk. The emergency repair disk contains a backup of registry files so that you can restore damaged Windows system files or perform disaster recovery. For instructions, see "Creating or updating the emergency repair disk" in Part 4 of the <i>CallPilot Installation and Configuration</i> guides. ATTENTION Nortel recommends that you create and maintain more than one copy of the emergency repair disk. The disks can be stored in a safe location off-site.	10 minutes	☐

Step	Description	Time required	Check
2	Perform a full system backup of the CallPilot system. For instructions about performing the backup, see the <i>CallPilot Administrator's Guide</i> (NN44200-601) and CallPilot online Help. ATTENTION Nortel recommends that the backup also be stored in a safe location off-site.	Based on server model, up to 3 hours	☐
3	For most CallPilot customers: Verify Web security and install CallPilot Manager and Reporter on a stand-alone Web server. When you install CallPilot Manager on a stand-alone Web server, you can choose the option of installing CallPilot Reporter. Note: Ensure that the Web server meets requirements. Nortel recommends an external security audit. For instructions, see the <i>CallPilot Software Administration and Maintenance</i> guide (NN44200-600).	10 minutes, if the Web server meets the requirements for CallPilot Manager	☐
4	Install pcAnywhere on the stand-alone Web server and a remote PC, and configure remote administrations. Note: Nortel requires pcAnywhere (supplied by the customer) for remote support.		
5	If purchased by the customer, install either or both: • Desktop Messaging on a user's personal computer • My CallPilot on the CallPilot server or stand-alone Web server For instructions, see "Desktop Messaging and My CallPilot installation tasks" (page 26).		

Desktop Messaging and My CallPilot installation tasks

Task	Reference
1 Review and understand: - the installation process - Desktop Messaging requirements - My CallPilot requirements	<i>Desktop Messaging and My CallPilot Installation and Administration Guide</i> (NN44200-305)
2 Complete the Preinstallation checklist.	<i>Desktop Messaging and My CallPilot Installation and Administration Guide</i> (NN44200-305), "Desktop Messaging and My CallPilot pre-installation checklist"
3 Configure the CallPilot server to support Desktop Messaging and My CallPilot.	<i>Desktop Messaging and My CallPilot Installation and Administration Guide</i> (NN44200-305), "Configuring the CallPilot Server"
4 Install or upgrade the Desktop Messaging software.	<i>Desktop Messaging and My CallPilot Installation and Administration Guide</i> (NN44200-305), "Installing Desktop Messaging"
5 Configure Desktop Messaging.	<i>Desktop Messaging and My CallPilot Installation and Administration Guide</i> (NN44200-305), "Configuring Desktop Messaging"
6 Install My CallPilot.	<i>Desktop Messaging and My CallPilot Installation and Administration Guide</i> (NN44200-305), "Installing My CallPilot on a Web server"

Chapter 4

Upgrading CallPilot

Upgrading CallPilot software involves replacing the software with a higher numbered release. The upgrade can also require a hardware change.

You can upgrade your CallPilot system by using one of the following scenarios:

- upgrade from a previous release
- upgrade from a previous release after performing a feature expansion
- upgrade from a previous release at the same time as performing a feature expansion

You cannot downgrade to a previous version of CallPilot software.

Upgrade documentation

For instructions about upgrading your CallPilot server, see the *CallPilot Upgrade and Platform Migration Guide* (NN44200-400).

ATTENTION

If you are upgrading to include High Availability, see the *High Availability Installation and Configuration guide* (NN44200-311).

Chapter 5

Expanding CallPilot features and capacity

Perform a CallPilot software expansion when you want to:

- add one or more keycoded features, such as AppBuilderFax or Networking
- increase the number of channels
- install additional languages

ATTENTION

Before you can perform a software expansion, you must acquire a new keycode from Nortel.

ATTENTION

If you are expanding CallPilot features to include the High Availability feature, see the *High Availability Installation and Configuration guide* (NN44200-311).

Feature expansion checklist

Step	Description	Time required	Check
1	Compare the current CallPilot system configuration with the expansion keycode label, and ensure that: • the serial number matches • the feature limits on the keycode label are equal to or greater than the limits on the CallPilot server If the information on the keycode does not match the system configuration, the expansion may not succeed.	5 minutes	☐

Step	Description	Time required	Check
2	Install additional hardware, if required. Note: Your system may require additional switch programming with the new hardware. If your CallPilot expansion includes an increase in system capacity, you may need to - install and configure more MGate cards on the switch (tower and rackmount platforms only). For instructions, see the CallPilot configuration guide for your switch and server. - perform a platform migration. For instructions, see the <i>CallPilot Upgrade and Platform Migration guide</i> (NN44200-400). - ensure the Meridian 1 or CS1000 system is properly load-balanced when you add MGate cards. For instructions, see the <i>Communication Server 1000M and Meridian 1 Planning and Engineering guide</i> (553-3021-120) and the <i>CallPilot Planning and Engineering guide</i> (NN44200-200). - install MPB96 boards (tower and rackmount platforms only) or MPC-8 cards (201i). For instructions, see the <i>Server Maintenance and Diagnostics guide</i> for your server. Note: If the Windows New Hardware Found detection wizard appears, click the Next button and select Nortel MPB driver.	30 minutes to 1 hour	☐
3	Log on to the server, and then run the Configuration Wizard. For logon and configuration instructions, see the following: - CallPilot configuration guide for your switch and server - the Configuration Wizard online Help	20 minutes, plus up to 1 hour to apply the changes	☐
4	Restart the server and ensure that CallPilot starts.	Based on your server model, 10 minutes	☐

Step	Description	Time required	Check
5	Ensure that CallPilot receives calls. For instructions, see the CallPilot configuration guide for your switch and server.	5 minutes	☐
6	Ensure that all call and multimedia channels and features work as expected. This includes sending a fax, logging on to the mailbox using Speech Activated Messaging, using the phoneset to read e-mail, verifying that Desktop Messaging works, and using Reporter to generate the relevant reports. For instructions, see the CallPilot configuration guide for your switch and server.	2 hours	☐
7	Create a backup of the CallPilot system. For instructions about performing the backup, see the <i>CallPilot Administrator's Guide</i> (NN44200-601).	Based on server model, up to 3 hours	☐

ATTENTION

Nortel recommends that the backup be stored in a safe location off-site.

Chapter 6

CallPilot server platform migration

Perform a platform migration to migrate data from one CallPilot server to another CallPilot server without losing existing CallPilot information. The migration path must be from an existing CallPilot platform to another equivalent or larger CallPilot platform. If your current server platform is not supported, you must perform a platform migration.

The unsupported platforms are:

- 200i
- 702t
- 1001rp

Platform Migration documentation

For instructions about migrating your CallPilot server, see the *CallPilot Upgrade and Platform Migration Guide* (NN44200-400).

Chapter 7

High Availability

A CallPilot High Availability system consists of two 1005r servers that work as peers. At any time, one server is active while the other server is in standby mode. The servers are referred to as CallPilot server 1 (CP1) and CallPilot server 2 (CP2).

For detailed information, see *High Availability: Installation and Configuration* (NN44200-311).

Installing a new High Availability system

The following table outlines the tasks required to install, configure, and test the High Availability feature. The tasks (and procedures within each task) must be completed in the order presented in the following table.

Task	Procedures required to complete the task
Prepare the switch.	<i>High Availability: Installation and Configuration</i> (NN44200-311), "Preparing the switch and the servers"
Install the two 1005r servers.	<i>High Availability: Installation and Configuration</i> (NN44200-311), "Installing the two 1005r servers"
Prepare both 1005r servers.	<i>High Availability: Installation and Configuration</i> (NN44200-311) • "Changing the server name (optional)" • "Installing the antivirus software (optional)" • "Running the CallPilot Setup Wizard"
Configure CP1 and CP2 using the CallPilot Configuration Wizard.	<i>High Availability: Installation and Configuration</i> (NN44200-311) • "Configuring CP1 using the CallPilot Configuration Wizard" • "Configuring CP2 using the CallPilot Configuration Wizard"

Connect and verify the LAN connections.	<i>High Availability: Installation and Configuration (NN44200-311)</i> • "Connecting and verifying LAN connections" • "Modifying the hosts file (optional)" • "Testing the host name resolution"
Run Stage 1 of the High Availability Configuration Wizard to check the configuration of CP1 and CP2.	<i>High Availability: Installation and Configuration (NN44200-311), "Running Stage 1 of the High Availability Configuration Wizard to check CP1 and CP2 configuration"</i>
Install the AutoStart 5.2.2 software on CP1.	<i>High Availability: Installation and Configuration (NN44200-311), "Installing the AutoStart Agent and Console software on CP1"</i>
Configure licensing and security on CP1.	<i>High Availability: Installation and Configuration (NN44200-311), "Configuring licensing and security by adding the CP2 Administrator Account to the AutoStart Console"</i>
Install the AutoStart 5.2.2 software on CP2.	<i>High Availability: Installation and Configuration (NN44200-311), "Installing the AutoStart Agent software on CP2"</i>
Configure the AutoStart software on CP1.	<i>High Availability: Installation and Configuration (NN44200-311)</i> • "Modifying the AutoStart Domain and Verification links" • "Adding the Remote Mirroring Host on CP2" • "Generating the AutoStart Definition File" • "Importing the AutoStart Definition file" • "Adding the Windows administrator account password for the AutoStart Utility Processes"
Bring the Resource Groups online.	<i>High Availability: Installation and Configuration (NN44200-311)</i> • Bringing the CallPilot Resource Group online on CP1 • Bringing the Resource Groups CallPilot_[CP1] and CallPilot_[CP2] online
Test your configuration.	<i>High Availability: Installation and Configuration (NN44200-311), "Testing the configuration of CP1 and CP2"</i>
Create the CallPilot Reporter connections.	<i>High Availability: Installation and Configuration (NN44200-311), "Creating the Reporter connection"</i>
Add server to a Windows domain (if required).	<i>High Availability: Installation and Configuration (NN44200-311), "Joining a Windows domain"</i>

Feature Expansion

If you are upgrading or migrating to a CallPilot 5.0 1005r server and are adding the High Availability feature, do the following:

Step	Action
1	Follow the instructions in the <i>CallPilot Upgrade and Platform Migration Guide</i> (NN44200-400) to upgrade or migrate your server to a CallPilot 1005r server running CallPilot 5.0. (Note: Do not enable the High Availability feature when running the Configuration Wizard.)
2	Follow the instructions outlined in <i>High Availability: Installation and Configuration</i> (NN44200-311) to perform a feature expansion to add the High Availability feature to an existing CallPilot 5.0 1005r server. This procedure introduces a second 1005r server and configures the two 1005r servers as a High Availability pair.

—End—

If you have a CallPilot 5.0 1005r server and are adding the High Availability feature, then follow the instructions outlined in *High Availability: Installation and Configuration* (NN44200-311) to perform a feature expansion. This procedure adds the High Availability feature to an existing CallPilot 5.0 1005r server by introducing a second 1005r server and configuring the two 1005r servers as a High Availability pair.

Chapter 8

Configuring and administering the CallPilot system

A CallPilot administrator can:

- configure mailbox security
- add or customize restriction permission lists (RPLs)
- configure addressing information
- configure messaging service defaults
- configure CallPilot services (service DNS) and customize system prompts
- configure CallPilot networking
- customize and add mailbox classes to provide group access to installed CallPilot services
- add, delete, and customize mailboxes
- create and maintain shared distribution lists (SDL)

Logging on to the CallPilot server with CallPilot Manager

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

The logon process is completed in two stages:

Step	Action
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/`.

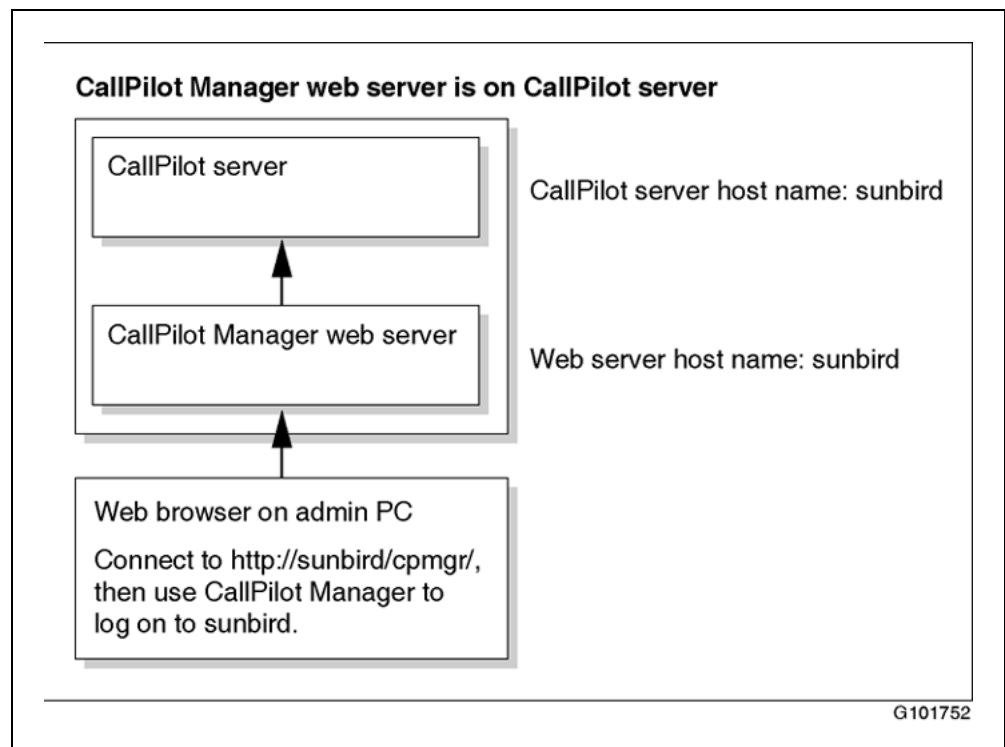
- 2 Log on to the CallPilot server with an administrator mailbox number and password.

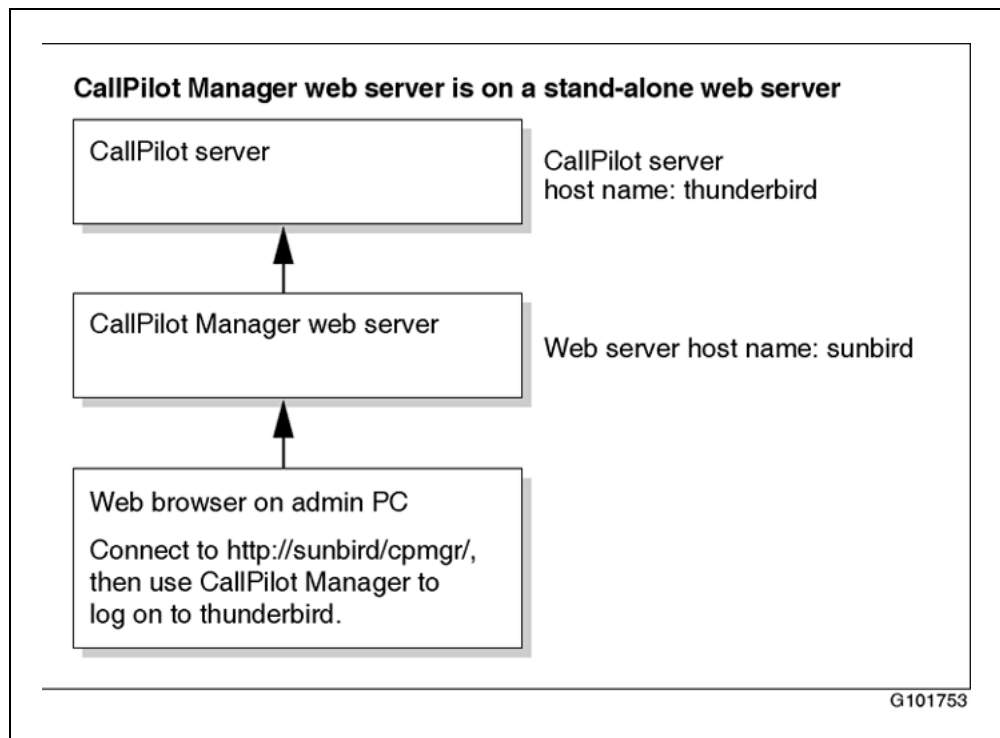
—End—

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 host name or IP address as well as the CallPilot server host name or IP address.

See the following diagrams:





To log on to the CallPilot server

Step	Action
------	--------

- | | |
|---|---|
| 1 | Launch the Web browser on your PC or on the CallPilot server. |
|---|---|

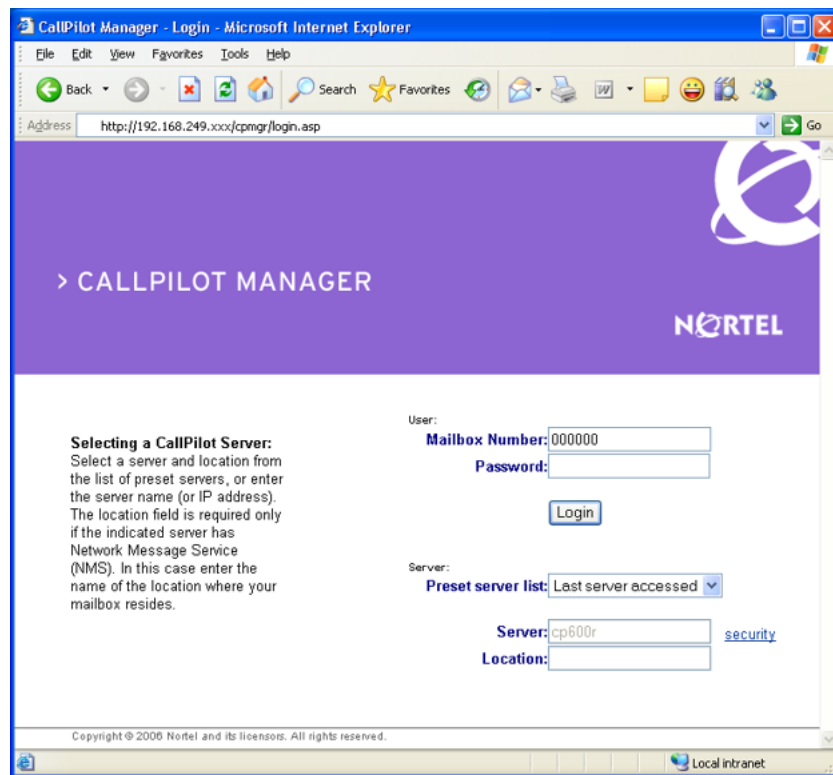
IF you are launching the Web browser on	THEN
--	------

the CallPilot server	the CallPilot Manager - Login window appears automatically. Continue with step 2 .
----------------------	--

your PC	type the CallPilot Manager Web server 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 window
appears. Continue with [step 2](#).



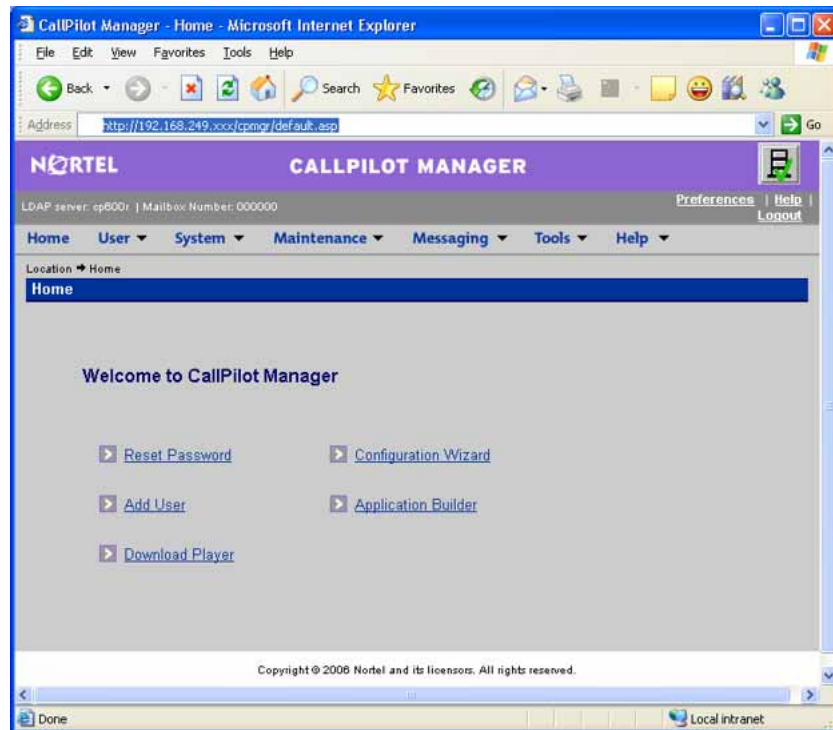
Note: The URL automatically appears as `http://<host name or IP address>/cpmgr/login.asp`. On the CallPilot server, the URL is `http://localhost/cpmgr/login.asp`.

- 2 In the CallPilot Manager Login page, type the administrator mailbox number and password:
 - administrator mailbox number (default): 000000
 - administrator mailbox password (default): 124578
- 3 Do one of the following:
 - From the list of preconfigured servers or locations in the **Preset server** list box, choose a server or location or choose the **Last server accessed**.
 - In the **Server** box, type the CallPilot server host name or IP address.
 - Type the CallPilot server 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 if the CallPilot server that you connect to has Network Message Service (NMS) installed.

4 Click **Login**.

The main CallPilot Manager window appears.

Note: If you log on to new system, the Configuration Wizard is the only option available.



—End—

On-site configuration and administration tasks

Task	Reference
1 For customers with more than 1000 mailboxes: Add specialized administrators.	From the Contents tab of the CallPilot Manager Help, navigate to Delegating administrative tasks.
2 Set up mailbox security.	From the Contents tab of the CallPilot Manager Help, navigate to Securing the CallPilot system > Configuring mailbox security.
3 Customize restriction permission lists (RPLs).	From the Contents tab of the CallPilot Manager Help, navigate to Securing the CallPilot system > Maintaining restriction permission lists (RPLs) > Customizing RPLs.

Task	Reference
4 Verify basic messaging defaults.	From the Contents tab of the CallPilot Manager Help, navigate to Configuring CallPilot services > Configuring CallPilot messaging service defaults > Changing messaging defaults.
5 If purchased by the customer: Configure CallPilot networking.	From the Contents tab of the CallPilot Manager Help, navigate to Administering a messaging network.
6 Use the Configuration Worksheet as a reference to add service DNS (SDNs) for custom applications (including voice menus).	From the Contents tab of the CallPilot Manager Help, navigate to Configuring CallPilot services > Adding and deleting inbound SDNs.
7 Configure user creation templates.	From the Contents tab of the CallPilot Manager Help, navigate to Managing mailbox creation and privileges > Using templates to create mailboxes.
8 Customize system prompts.	From the Contents tab of the CallPilot Manager Help, navigate to Configuring CallPilot services > Configuring CallPilot messaging service defaults > Customizing system prompts.
9 If purchased by the customer: Configure fax services.	"Fax services configuration tasks" (page 46) of this document.
10 If purchased by the customer: Configure speech activated messaging services.	"Speech activated messaging service configuration tasks" (page 47) of this document.
11 If purchased by the customer: Configure E-mail by Phone options.	"E-mail By Phone configuration tasks" (page 47) of this document.
12 Test CallPilot operation: 1. Add test mailboxes. 2. Verify CallPilot Manager search functionality. 3. Verify operation of new unified messaging components. 4. Verify mailbox access controls.	• From the Contents tab of the CallPilot Manager Help, navigate to Administering mailboxes > Adding and removing mailboxes. • From the Contents tab of the CallPilot Manager Help, navigate to Securing the CallPilot system > Configuring mailbox security.

Task	Reference
13 Add custom applications (including voice menus).	- From the Contents tab of the CallPilot Manager Help, navigate to Configuring CallPilot services. <i>CallPilot Application Builder Guide</i> (NN44200-102). - CallPilot Application Builder online Help topics.
14 Set up basic reports to monitor the system. Note: This requires that CallPilot Manager and Reporter are installed on a stand-alone Web server.	- From the Contents tab of the CallPilot Manager Help, navigate to Monitoring the CallPilot system > Running reports. <i>CallPilot Reporter Guide</i> (NN44200-603).
15 For upgrades: Use CallPilot archives to migrate mailbox, custom prompt, and Application Builder information. Note: Using mailbox (user) archives to migrate mailbox information gives mailbox owners with remote notification capability automatic remote text notification capability.	From the Contents tab of the CallPilot Manager Help, navigate to Securing the CallPilot system > Backing up and restoring CallPilot information > Using CallPilot archives.
16 Add remaining mailbox owners and shared distribution lists (SDLs).	From the Contents tab of the CallPilot Manager Help, navigate to Administering mailboxes > Adding and removing mailboxes > Adding a group of mailboxes in a single operation.

Desktop Messaging and My CallPilot configuration tasks

Task	Reference
1 Configure mailbox classes to enable mailbox owners to access Desktop Messaging and My CallPilot.	From the Contents tab of the CallPilot Manager Help, navigate to Managing mailbox creation and privileges > Using mailbox classes to manage mailbox privileges > Permitting use of optional unified messaging components.
2 Configure and apply the Desktop Messaging restriction permission list (RPL) to control access to Desktop Messaging and My CallPilot.	From the Contents tab of the CallPilot Manager Help, navigate to Securing the CallPilot system > Maintaining restriction permission lists (RPLs) > Applying RPLs.
3 Define support information for My CallPilot users.	<i>CallPilot Desktop Messaging and My CallPilot Installation and Administration Guide</i> (NN44200-305), CallPilot server configuration for My CallPilot services.

Task	Reference
4 If mailbox owners have e-mail by phone capability: Configure E-mail by Phone.	"E-mail By Phone configuration tasks" (page 47) of this document.
5 If mailbox owners have remote text notification capability: Configure the appropriate user creation templates with remote text notification options.	From the Contents tab of the CallPilot Manager Help, navigate to Managing mailbox creation and privileges > Using templates to create new mailboxes.

Fax services configuration tasks

Task	Reference
1 Apply RPLs to fax callbacks and fax printing.	From the Contents tab of the CallPilot Manager Help, navigate to Securing the CallPilot system > Maintaining restriction permission lists (RPLs) > Applying RPLs.
2 Verify the express fax messaging session profile.	From the Contents tab of the CallPilot Manager Help, navigate to Configuring a session profile for a voice menu or service.
3 Configure fax callback handling and other fax options.	From the Contents tab of the CallPilot Manager Help, navigate to Configuring callback handling for an Application Builder fax service.
4 Update or add mailbox classes to enable fax capability for groups.	From the Contents tab of the CallPilot Manager Help, navigate to Managing mailbox creation and privileges > Using mailbox classes to manage mailbox privileges > Permitting use of optional unified messaging components > Permitting mailbox class members to send and receive faxes.
5 Configure fax general delivery and fax overflow mailboxes.	From the Contents tab of the CallPilot Manager Help, navigate to Administering mailboxes > Customizing mailboxes for special purposes > Setting up mailboxes to handle fax deliveries and fax machine overflows.

Speech activated messaging service configuration tasks

Task	Reference
1 Update or add mailbox classes to enable speech activated messaging for mailbox class members.	From the Contents tab of the CallPilot Manager Help, navigate to Managing mailbox creation and privileges > Using mailbox classes to manage mailbox privileges > Permitting use of optional unified messaging components > Speech activated messaging > Permitting mailbox class members to speak CallPilot phoneset commands.

E-mail By Phone configuration tasks

Task	Reference
1 Define external e-mail servers.	From the Contents tab of the CallPilot Manager Help, navigate to Desktop Messaging and My CallPilot > Adding and removing external e-mail servers.
2 Define E-mail by Phone options.	From the Contents tab of the CallPilot Manager Help, navigate to Configuring CallPilot services > Configuring E-mail by phone > Defining E-mail by Phone options.
3 Update or add mailbox classes to enable speech activated messaging for mailbox class members.	From the Contents tab of the CallPilot Manager Help, navigate to Managing mailbox creation and privileges > Using mailbox classes to manage mailbox privileges > Permitting use of optional unified messaging components > Permitting mailbox class members to listen to e-mail messages over a phoneset.

Chapter 9

Testing the CallPilot system and applications

When a CallPilot system is installed, upgraded, or migrated to a different platform, perform the "Onsite testing tasks" (page 49).

Onsite testing tasks

Task	Reference
1 Test the CallPilot connectivity, services, and channels.	<i><switch_model> and CallPilot Server Configuration</i> guide for your switch and server. Also, refer back to "Testing CallPilot connectivity, services, and channels" (page 23) in this task list guide for an overview of the configuration testing that is performed during installation.
2 Add test mailboxes.	From the Contents tab of the CallPilot Manager Help, navigate to Administering mailboxes > Adding and removing mailboxes > Adding mailboxes, one at a time.
3 Verify that you can log on to the mailbox.	<i><switch_model> and CallPilot Server Configuration</i> guide for your switch and server.
4 Test mailbox search functions.	From the Contents tab of the CallPilot Manager Help, navigate to Administering mailboxes > Finding mailboxes, administrators or directory entries.
5 If pcAnywhere is installed on a remote computer: Test remote administration of the CallPilot server.	<i>CallPilot Administrator's Guide</i> (NN44200-601), "Configuring remote administration of the CallPilot server".

Task	Reference
6 If Reporter is installed: Test the Reporter link and set up monitoring and reports.	• <i>CallPilot Administrator's Guide</i> (NN44200-601), "Learning about CallPilot features". • <i>CallPilot Reporter Guide</i> (NN44200-603).
7 If Application Builder is installed: Test the Application Builder link and ensure the availability of existing custom applications.	• <i>CallPilot Administrator's Guide</i> (NN44200-601), "Understanding CallPilot features and services". • <i>CallPilot Application Builder Guide</i> (NN44200-102).

Chapter 10

Starting up and shutting down the CallPilot server

This chapter contains information on the following topics:

"Stopping and starting channels" (page 51)

"Restarting the server" (page 54)

"Powering down the server" (page 57)

"Powering up the server" (page 60)

Stopping and starting channels

This section describes how to stop and start channels.

Introduction

If you take the CallPilot system out of service to perform software or hardware maintenance, first take all channels off duty.

If you take channels off duty, you must manually start them to put them back on duty. Channels that are manually taken off duty do not automatically start when the CallPilot server is restarted or powered up.

Methods for taking channels off duty

Two options exist to take channels off duty:

- Courtesy stop channels (preferred method)

When you courtesy stop channels, CallPilot waits until the channels are no longer active before taking them off duty, instead of suddenly terminating active calls.

- Stop channels

When you stop channels, you suddenly take them off duty and terminate all active calls.

ATTENTION

Nortel recommends that, if possible, you courtesy stop channels. Courtesy stop is available only at the individual channel level.

To courtesy stop CallPilot, use the following:

- Multimedia Monitor: to courtesy stop a range of multimedia (DSP) channels
- Channel Monitor: to courtesy stop a range of call (DS30X, also known as DS0) channels

Stopping or starting channels

Step	Action				
1	Log on to the CallPilot server with CallPilot Manager. For instructions, see "Logging on to the CallPilot server with CallPilot Manager" (page 39) .				
2	In CallPilot Manager, click Maintenance > Multimedia Monitor . The Multimedia Monitor screen appears, showing the channels associated with each DSP.				
3	Select the check box for each DSP channel.				
4	Do one of the following:				
	<table border="1"> <thead> <tr> <th>IF you want to</th> <th>THEN</th> </tr> </thead> <tbody> <tr> <td>take the selected channels off duty</td> <td> do the following: 1. Click Courtesy Stop. Note: If the Courtesy Stop button is not available, wait a few seconds for the screen to refresh. You are asked to confirm the Courtesy Stop. 2. Click OK. </td> </tr> </tbody> </table>	IF you want to	THEN	take the selected channels off duty	do the following: 1. Click Courtesy Stop. Note: If the Courtesy Stop button is not available, wait a few seconds for the screen to refresh. You are asked to confirm the Courtesy Stop. 2. Click OK.
IF you want to	THEN				
take the selected channels off duty	do the following: 1. Click Courtesy Stop. Note: If the Courtesy Stop button is not available, wait a few seconds for the screen to refresh. You are asked to confirm the Courtesy Stop. 2. Click OK.				

ATTENTION

Courtesy stop is available only at the individual channel level. Therefore, to take the CallPilot system out of service, you must select each channel before clicking Courtesy Stop.

IF you want to	THEN
	The selected DSP channels change to off-duty status.
put the selected channels on duty	Click Start . The selected DSP channels change to on-duty status.

5 Click **Maintenance > Channel Monitor**.

The Channel Monitor screen appears, showing the DS0 channels associated with each DS30X link.

ATTENTION

Courtesy stop is available only at the individual channel level. Therefore, to take the CallPilot system out of service, you must select each channel before clicking Courtesy Stop.

6 Select the check box for each DS0 channel.

7 Do one of the following:

IF you want to	THEN
take the selected channels off duty	do the following: - Click Courtesy Stop. Note: If the Courtesy Stop button is not available, wait a few seconds for the screen to refresh. You are asked to confirm the Courtesy Stop. - Click OK. The selected DS0 channels change to off-duty status. - After all channels are off duty, dial the CallPilot messaging DN to verify that all DSP and DS0 channels are off duty. If all channels are off duty, you may receive a busy signal.
put the selected channels on duty	Click Start . The selected DS0 channels change to on-duty status.

—End—

Restarting the server

This section describes how to restart the server.

When to restart the server

You must restart the server as described in this section when you:

- are putting software changes into effect
- are attempting to resolve operational problems
- are instructed to do so

ATTENTION

Nortel recommends that, if the CallPilot server is in service, you courtesy stop all channels before you restart the server. When you courtesy stop the channels, CallPilot waits until the channels are no longer active before disabling them, instead of suddenly disconnecting active calls.

For instructions, see ["Stopping and starting channels" \(page 51\)](#).

ATTENTION

To minimize the amount of time required to wait for channels to become inactive, consider one or both of the following options:

- Perform the server restart during off-hours.
- Inform mailbox users and other administrators in advance when you plan to restart the server. This ensures that their Desktop Messaging, Web messaging, and administration sessions are logged off.

Before you begin

If your server is a 201i server, and you are working at the server, connect a keyboard, monitor, and mouse to the server.

Restarting the server

To restart the server, you must be working at the CallPilot server or be connected to the server through pcAnywhere.

Step	Action
1	Log on to the server with CallPilot Manager. For instructions, see "Logging on to the CallPilot server with CallPilot Manager" (page 39) .
2	Courtesy stop all call channels.

For instructions, see "Stopping and starting channels" (page 51).

3 Do one of the following:

IF you are	THEN
at the server	continue to next step.
at a PC connected remotely to the server	do the following: 1. Use pcAnywhere to connect to and log on to the CallPilot server. 2. Continue to next step.

4 Close all applications on the server.

Note: Applications that you are unable to close are automatically closed when you perform the operating system shutdown.

5 Press **Ctrl+Alt+Delete**.

Note: Shutting down the server software by pressing the Ctrl+Alt+Delete keys closes database files properly and reduces the time to restart the server.

The Windows Security dialog box appears.

6 Set the following options in the **Windows Security** dialog box:

What do you want to do?	Choose Restart from the drop-down menu.
Select the option that best describes why you want to shut down the computer.	Choose one of the following: • Other (Planned) • Hardware: Maintenance (Planned) • Hardware: Installation (Planned) • Operating System: Reconfiguration (Planned) • Application: Maintenance (Planned) • Application: Installation (Planned)

- Security Issue

Comment	If you selected Other (Planned) above, the OK button is unavailable. You must add a comment to enable the button.
---------	---

- 7 Click **OK**.
The server shuts down and then restarts.
Note: To interpret the diagnostic results that appear during the restart, see the *CallPilot <server_model> Server Maintenance and Diagnostics* guide for your server.
 - 8 When the operating system logon prompt appears, press **Ctrl+Alt+Delete** to log on.
You are prompted for an operating system user name and password.
 - 9 Enter **Administrator** as the user name.
Note: You can choose to log on with a different user ID that has local administrative privileges.
 - 10 Enter the password, and then click **OK**.
The CallPilot server software starts.
- ATTENTION**

Wait 10 minutes before proceeding with [step 11](#).
- 11 Log on to the server with CallPilot Manager.
For instructions, see "[Logging on to the CallPilot server with CallPilot Manager](#)" (page 39).
 - 12 Start the DSP and DS0 channels on the Multimedia Monitor and Channel Monitor screens in CallPilot Manager.
For instructions, see "[Stopping and starting channels](#)" (page 51).
 - 13 Ensure that CallPilot is ready to accept calls.
For instructions, see the <switch_model> and *CallPilot Server Configuration* guide for your switch and server.

—End—

Powering down the server

This section describes how to power down a server.

Powering down a tower or rackmount server

Power down a tower or rackmount server when you want to:

- remove the server cover (for example, to access the interior components of the server)
- move the server to another location
- replace, remove, add, or upgrade server hardware that is not hot-swappable

Powering down a 201i server

Power down a 201i server when you need to replace, remove, add, or upgrade server hardware.

Note: The 201i server is powered automatically by the switch when it is locked into position on the switch.



CAUTION

Risk of equipment damage

When powering down the 201i, do not simply unseat it. The 201i server obtains power from the shelf. Use the procedure [To power down the server](#).

ATTENTION

When power is lost at the SL-100, the CallPilot server must be shut down gracefully. After power is restored to the SL-100 and the T1 trunks are operational, restart the CallPilot server.

ATTENTION

If CallPilot is in service, Nortel recommends that you courtesy stop all channels before you power down the server. When you courtesy stop the channels, CallPilot waits until the channels are no longer active before disabling them instead of suddenly disconnecting active calls.

For instructions, see "[Stopping and starting channels](#)" (page 51).

ATTENTION

To minimize the amount of time that you may be required to wait for channels to become inactive, consider one or both of the following options:

- Power down the server during off-hours.
- Inform mailbox users and other administrators in advance when you plan to power down the server. This ensures that their Desktop Messaging, Web messaging, and administration sessions are logged off.

Before you begin

If your server is a 201i server, and you are working at the server, connect a keyboard, monitor, and mouse to the server.

Powering down the server

To power down the server, you must be working at the CallPilot server or be connected to the server through pcAnywhere.

Step	Action						
1	Log on to the server with CallPilot Manager. For instructions, see " Logging on to the CallPilot server with CallPilot Manager " (page 39).						
2	Courtesy stop all call channels. For instructions, see " Stopping and starting channels " (page 51).						
3	Do one of the following: <table> <tr> <th>IF you are</th><th>THEN</th></tr> <tr> <td>at the server</td><td>continue to next step.</td></tr> <tr> <td>at a PC connected remotely to the server</td><td>do the following: 1. Use pcAnywhere to connect to and log on to the CallPilot server. 2. Continue to next step. </td></tr> </table>	IF you are	THEN	at the server	continue to next step.	at a PC connected remotely to the server	do the following: 1. Use pcAnywhere to connect to and log on to the CallPilot server. 2. Continue to next step.
IF you are	THEN						
at the server	continue to next step.						
at a PC connected remotely to the server	do the following: 1. Use pcAnywhere to connect to and log on to the CallPilot server. 2. Continue to next step.						
4	Close all applications on the server. Note: Applications that you are unable to close are automatically closed when you perform the operating system shutdown.						
5	Press Ctrl+Alt+Delete . The Windows Security dialog box appears.						

Note: Shutting down the server software by pressing the Ctrl+Alt+Delete keys properly, closes database files and reduces the time to restart the server

6 Set the following options in the Windows Security dialog box:

What do you want to do?	Choose Shut down from the drop-down menu.
Select the option that best describes why you want to shut down the computer.	Choose one of the following: • Other (Planned) • Hardware: Maintenance (Planned) • Hardware: Installation (Planned) • Operating System: Reconfiguration (Planned) • Application: Maintenance (Planned) • Application: Installation (Planned) • Security Issue
Comment	If you selected Other (Planned) above, the OK button is unavailable. You must add a comment to enable the button.

7 Click **OK**.

Server shutdown begins.

8 Do one of the following:

IF your server is	THEN
a tower or rackmount server	press the server power switch.
a 201i server	do the following: 1. Ensure that DOWN appears on the server HEX display. Note: The red LED power status indicator remains lit during the shutdown until the system is restarted.

IF your server is**THEN**



2. Remove the server from the switch.
-

—End—

To Power up the server

If you power down the server to perform hardware maintenance, use the procedure described in this section to restart the server.

Powering up the server

Step	Action
1	Ensure that all peripheral devices are powered up. Note: If your server is a 201i server: • Ensure that the switch shelf is also powered up. • Ensure that a monitor is connected during the power-up sequence. Note: The monitor is connected only when you need it. The 201i server is not intended to operate with a permanent monitor connection.

2 Do the following:

IF your server is	THEN
a tower or rackmount server	press the server power switch to start the server.
a 201i server	do the following: 1. Push the server gently but firmly until it is flush with the switch backplane. The server beeps for 3 seconds to indicate that power is received. 2. Close the lock latches to secure the server to the backplane. 3. Ensure that the power status LED is lit.

3 Watch the start-up sequence as follows:

IF your server is	THEN
a tower or rackmount server	Observe the Power-On Self-Test (POST) and initialization messages on the monitor. Ensure that all alarm LEDs are green (600r and 1005r)
a 201i server	Watch the HEX display on the server. The HEX display shows T:01 through T:08, and then HOST.

4 The server boots into the operating system automatically, displaying a series of start-up screens and finally the operating system logo.

IF your server is	THEN
a tower or rackmount server	The operating system start sequence begins. When the start sequence is completed, the operating system logon prompt appears on the monitor.

IF your server is	THEN
	If the logon prompt does not appear, see the <i>CallPilot <server_model> Server Maintenance and Diagnostics</i> guide for your server.
201i server	The operating system start sequence begins, and communication with the switch occurs. The HEX display shows NT (for about 30 seconds), followed by OK. The operating system logon prompt appears on the monitor. Note: Before OK appears, one of the following messages may appear, but not for more than 1 second: CDLN, C:01, or C:02. This is normal operation. If OK, or the logon prompt, or both do not appear, see the <i>CallPilot <server_model> Server Maintenance and Diagnostics</i> guide for your server.

You are prompted for an operating system user name and password. If the system needs to be configured, a pop-up box for Maintenance Configuration Detection Information may appear to remind you.

- 5 If the **Maintenance Configuration Detection Information** box appears, click **OK** unless you want a reminder to configure the server.

Note: On the 201i server, the HEX display changes from OK to CRI.

- 6 Enter the user name (Administrator) and the password.

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

- 7 Click **OK**.

The CallPilot server software starts.

ATTENTION

Wait 10 minutes before proceeding with the next step.

- 8 Log on to the server with CallPilot Manager.

For instructions, see "[Logging on to the CallPilot server with CallPilot Manager](#)" (page 39).

- 9 Start the DSP and DS0 channels on the **Multimedia Monitor** and **Channel Monitor** windows in CallPilot Manager.
For instructions, see ["Stopping and starting channels" \(page 51\)](#).
- 10 Ensure that CallPilot is ready to accept calls.
For instructions, see the CallPilot configuration guide for your switch and server.

—End—

Chapter 11

Troubleshooting system problems

This chapter contains information on the following topics:

"Overview" (page 65)

"Using the Installation and Configuration guides" (page 66)

"Using the CallPilot Administrator Guide" (page 69)

If the monitor suddenly shows a blue screen with only white text, a system error has occurred. Record all of the events that took place prior to the appearance of the blue screen. Record any text that appears on the blue screen, and contact customer support for assistance.

Overview

This section provides an overview of the resources and tools that you can use to determine the cause of system problems, and then resolve them.

Resources

Documentation available for resolving system problems are:

- *CallPilot <server_model> Server Maintenance and Diagnostics* guide for your server
- *CallPilot Administrator's Guide* (NN44200-601)
- *CallPilot Troubleshooting Reference Guide* (NN44200-700)

Tools

The following tools are provided with your CallPilot system and are briefly described in this chapter:

Type	Tools
Generic tools	TCP/IP diagnostics
Operating system tools	- Diagnostics - Event Viewer
CallPilot tools	- LEDs and HEX display (201i server) - start-up sequence and diagnostic codes - System Event Log (703t server) - installation and configuration log files
CallPilot tools (continued)	- CallPilot System Configuration (to display switch and server settings) - Disk Usage window - Server Performance Monitor - Event Browser - Alarm Monitor - Maintenance window - Reporter - Channel Monitor - Multimedia Monitor
CallPilot system utilities	- Diagnostics utility - PEP Maintenance utility - System Monitor

Using the Installation and Configuration guides

The Installation and Configuration guides provide instructions for using the resources provided by your CallPilot system.

LEDs

Server type	Description
tower or rackmount server	The tower and rackmount servers provide LEDs on their front panel, on CD-ROM/DVD and tape drives, and on network interface cards. These LEDs indicate the operating status of the server or drive. On the network interface card, the LEDs also indicate if network activity is present.
201i server	The LEDs on the 201i server faceplate indicate when: - the server and MPC-8 cards are in use - the network interfaces, hard drive, and SCSI device are in use (201i server)

Server type	Description
	it is safe to remove the server from the switch, or the MPC-8 card from the server The HEX display on the 201i server faceplate displays messages that appear during start-up or normal server operation. For more information, see the <i>CallPilot <server_model> Server Maintenance and Diagnostics</i> guide for your server.

Start-up sequence and diagnostic codes

To help you determine if the server started successfully (or if it failed), watch the start-up sequence and the diagnostic codes that appear on the monitor. If your server is a 201i server, also observe the HEX display on the server faceplate.

If a hardware problem on the 703t server prevents the operating system from starting or a hardware problem is indicated by the status LED on the front panel, you can use the server System Event Log to investigate the problem. The System Event Log is a utility on the 703t server that reports hardware-related errors. You can access the System Event Log by using the System Setup Utility.

For more information, see the *CallPilot <server_model> Server Maintenance and Diagnostics* guide for your server.

Log files

The installation event log tracks events associated with any installation, reinstallation, upgrade, or uninstallation operation. The log also tracks any fatal errors that interrupt these operations.

The Configuration Wizard log file is a record of the information entered through the CallPilot Configuration Wizard.

For more information, see the *CallPilot Software Administration Guide* (NN44200-600).

Operating system Diagnostics and Event Viewer

You can use the operating system Diagnostics window to view details concerning the system and network components.

The Event Viewer provides access to three logs (system, security, and application) that you can use to diagnose and debug system problems.

For more information, see the *CallPilot <server_model> Server Maintenance and Diagnostics* guide for your server.

TCP/IP diagnostics

The following diagnostic tools help you to verify network connectivity and routing:

- ipconfig
- ping
- tracert
- arp
- nbtstat
- netstat

For more information, see the *CallPilot <server_model> Server Maintenance and Diagnostics* guide for your server.

CallPilot Manager

Use the following screens in CallPilot Manager to monitor hardware status:

- Event Browser

You can use the Event Browser to view events that have been recorded in the server log. The event description can help you determine the root cause of an event or problem.

- Alarm Monitor

An alarm is a warning that is generated by an event. The alarm notifies you of a potential or real problem. Use the Alarm Monitor in CallPilot Manager to investigate one or more raised alarms.

- Maintenance

Use the Maintenance screen to get status information for server hardware components, or to run diagnostics for a particular component.

- Channel and Multimedia Monitors

The Channel Monitor shows the status of DS0 channels, which are the connections that carry the call signals from the switch to CallPilot.

The Multimedia Monitor shows the status of multimedia channels, which are the DSP ports that process the calls. They are the voice, fax, and speech recognition channels.

For more information about using CallPilot Manager, see the following:

- *CallPilot Software Administration Guide* (NN44200-600)
- CallPilot Manager online Help
- *CallPilot <server_model> Server Maintenance and Diagnostics* guide for your server

CallPilot system utilities

You can use the Diagnostics utility to enable and disable CallPilot start-up diagnostics that run when the system starts. When diagnostics are disabled, this saves time during system maintenance operations where restarts or Call Processing services restarts are required.

The PEP Maintenance utility displays a list of all installed PEPs on the server and lets you uninstall PEPs.

The Services Monitor can help you determine whether the CallPilot server is fully operational. It displays true states of the CallPilot services according to the operating system definition, including the states that are not available through the control panel.

The Session Trace tool provides detailed information about the activity in a user's mailbox and the state of the message waiting indicator (MWI).

The System Monitor provides the following information:

- the status of all CallPilot services, multimedia channels, and call channels
- details about the CallPilot system, such as the features purchased, keycode, serial number, and IP addresses

For more information about these utilities, see the *CallPilot <server_model> Server Maintenance and Diagnostics* guide for your server.

Using the CallPilot Administrator Guide

The CallPilot Manager online Help and the *CallPilot Administrator's Guide* (NN44200-601) provide valuable information for monitoring system performance.

The CallPilot Manager online Help and the *CallPilot Administrator's Guide* (NN44200-601) both describe how to:

- view and filter server events
- monitor the CallPilot server
- manage CallPilot channels
- troubleshoot CallPilot call service and system operation problems

Accessing the CallPilot Administrator Guide

The *CallPilot Administrator's Guide* (NN44200-601) is provided in the following locations:

- on the CallPilot Documentation CD-ROM
- in the Installation and Administration area of CallPilot Manager

To access the Installation and Administration area, click the Help link in the top-right corner.

Viewing and filtering server events

If you want to reduce the number of events shown in the Event Browser at one time, you can screen the event log to view a specific number of the most recently filtered events. By default, the Event Browser displays the latest 100 critical events.

You can set the filter to display:

- a specific number of latest events, or all events that are retrieved from the server
- events of a certain severity (critical, major, minor, information)
- a specific event code range or all event codes
- a specific type of alarm status (alarm set, alarm cleared, or message)
- events that occur during a specific date and time interval

Note: The filter combines the filter settings from each category.

Monitoring the CallPilot server

Monitoring activities include the following:

- viewing switch configuration and server settings

You may need this information when you communicate with product support personnel.

- monitoring disk space

The performance of your CallPilot system depends, to some degree, on the amount of available disk space. Without enough disk space, the server cannot perform adequately. In some circumstances, the server can stop functioning.

Nortel systems are engineered to provide adequate space to meet your data storage and system operation requirements. You must, however, monitor disk space occasionally to ensure that space does not become too limited.

- monitoring the database

The database stores user information, system configuration information, and various statistics that are collected by the system. You cannot monitor the database disk space directly. However, an informational alarm is generated if the database reaches 95 percent capacity. A major alarm is generated if the database reaches 98 percent or 100 percent capacity.

Possible reasons for database problems include the following:

- Operational measurement statistics are too detailed or stored for too long.

- The system is under-engineered.

If your estimated usage patterns change or if your number of users grow, you may need to purchase additional disk space. Contact your Nortel channel partner for details.

- monitoring server performance

You can use the Performance Monitor to keep track of the day-to-day hardware and software operations of your system. The window includes information about processor usage, available memory, and available storage space. You may want to view server performance daily to ensure that the server is working properly. You may also want to view data if the performance of your server has deteriorated.

Managing CallPilot channels

Call channels carry digital voice, fax, and speech recognition data from the switch to the server. When the data reaches the server, the multimedia channels process the data according to the type of transmission.

You can monitor individual call channels through the Channel Monitor screen, and multimedia channels or MPC-8 cards through the Multimedia Monitor screen in CallPilot Manager.

As required, you can also remove the call and multimedia channels from service so that you can perform diagnostics, upgrades, or installations. When the maintenance or diagnostics are complete, restart the call and multimedia channels and put them back into service.

Troubleshooting call service problems

Call service problems may occur in the Remote Notification, Delivery to Telephone (DTT), and Delivery to Fax (DTF) services, if they have been put into service.

The types of problems that can occur when using Outcalling services include:

- being unable to use the Outcalling service because channels are not available

This situation can occur if the channel allocation is not spread evenly, or if channels are out of service or faulty.

- experiencing a high rate of failures because of incorrect configuration or because the retry limits are exceeded

DTT or DTF failures can occur because of the following conditions:

- busy
- no answer

- answered, but no DTMF confirmation was provided, or the call was terminated before delivery could occur

Remote Notification failures can occur because of the following:

- The users' Remote Notification target DN's are restricted.
- Pager setups may not be correctly configured for users.
- Retry limits are exceeded.

You can monitor these types of problems by using the Event Browser or Reporter.

Troubleshooting system operation problems

The following types of system operation problems can occur:

- Alarms are generated despite no apparent system problem.

If the system shows no apparent system problem but alarms occur, check if someone has recently run diagnostics on the system. A diagnostic test can generate an alarm as part of its test, even if the system is fine.

- Calls are not answered.

Possible causes include the following:

- CallPilot is improperly configured.
- The Service DN table is not configured correctly.

- Call flow from the switch is impaired due to an incorrect switch configuration.

- Calls are answered, but no prompts are heard.

Possible causes include the following:

- An error in the application that supports the requested service.
- A problem with the DS0 channel or the DS30X link.

- The system is not working after an IP address change.

If the IP address of a CallPilot server is changed while the system is up and running, the system does not work until you restart the switch.

- The monitor shows a blue screen.

If the monitor suddenly shows a blue screen with only white text, a system error has occurred. Record all of the events that took place prior to the appearance of the blue screen. Record any text that appears on the blue screen, and contact customer support for assistance.

Using the *CallPilot Troubleshooting Reference*

The *CallPilot Troubleshooting Reference* describes symptoms that can appear on all CallPilot server platforms, and describes ways to resolve them.

Obtaining the *CallPilot Troubleshooting Reference*

The *CallPilot Troubleshooting Reference* is written for Nortel distributors and technical support representatives and is, therefore, not included in the customer documentation package.

Nortel continually updates the *CallPilot Troubleshooting Reference* and posts it on the Nortel Partner Information Center (PIC) at:
<http://my.nortelnetworks.com>

You require a user ID and password to access the PIC. If you do not have a PIC account, click Register to request an account. It can take up to 72 hours to process your account request.

Note: If you are not a Nortel distributor, contact your Nortel technical support representative for assistance.

Types of problems that are covered

Use this document to resolve the following types of problems:

- server boot cycle failures
- peripheral device problems
- monitor display problems
- server to network connection problems
- remote access connection problems
- CallPilot application problems

Appendix A

Installation preparation checklists

This chapter contains information on the following topics:

"Site inspection checklist" (page 75)

"Required tools and materials" (page 78)

"Customer-supplied items checklist" (page 79)

"CallPilot server hardware checklist" (page 81)

"CallPilot hardware and documentation spares checklist" (page 84)

"CallPilot software media and documentation checklist" (page 84)

"Preinstalled software" (page 86)

Site inspection checklist

Before you perform the hardware installation, complete the following site inspection checklist:

Check	Description
☐	Ensure that a water fire retardant system is not present in the chosen location. An activation of this system could severely impact the ability of the CallPilot system to operate.
☐	Ensure that heat sources are not near the peripheral equipment. The CallPilot server environment must be properly cooled.

Check	Description
☐	Ensure that the area is isolated from strong electromagnetic fields and electrical noise sources such as air conditioners, large fans, motors, radio or TV transmitters, or high-frequency security devices.
☐	Ensure that the area is clean and clear of any debris.
☐	If the CallPilot server is a rackmount server, install the 19-inch rack. For instructions, see the rack documentation. ATTENTION If applicable, ensure that the rack meets seismic bracing requirements. For more information, see the documentation for your switch or system.
☐	Ensure that there is adequate space for all equipment. • If your server is a tower or rackmount server, ensure that there is adequate space for access to the front, side, and rear panels of the server. • For ventilation, ensure that there is adequate space for air flow around the peripheral equipment.
☐	Ensure that there is a desk, shelf, or table available for the monitor, keyboard, mouse, and modem.
☐	Ensure that an external analog phone line is available for the modem.
	Note: The line should not be connected to the customer's switch. If the switch goes down, the CallPilot server cannot be supported from a remote location.
☐	Ensure that a single-point ground reference is available for all the power outlets serving the CallPilot server and its peripherals. Before the CallPilot server installation, a qualified electrician must implement the single-point ground reference requirement between the power outlets of the CallPilot server and the power outlets of the switch. For more information, see the section about single-point grounding requirements in the <i>CallPilot Fundamentals</i> (NN44200-100). Provide a sufficient number of properly grounded power outlets or power bars for all equipment. You need one outlet for each of the following items: • server (if your server is a tower or rackmount platform)

Check	Description
	• Web-enabled administration PC that has network connectivity to CallPilot, or monitor, or both • modem (remote maintenance modem) • monitor • external CD-ROM drive (if your server is a 201i server) • external tape drive (optional for a 201i, 1005r or 600r server) • external SLR75 tape drive if your server is a 1005r or 600r • ELAN and NNS subnet Ethernet switch or hubs ATTENTION A Class A Ethernet switch or hub must be located 10 m (33 ft) away from the 703t server to comply with EMC requirements. • Contact Center (if installed) • customer-supplied network equipment (if required) • uninterruptible power supply (UPS) (if installed) Note: Nortel strongly recommends that you use a UPS to maintain power to the server and ELAN/NNS subnet Ethernet switch or hubs if you experience a power outage. ☐ Ensure that jacks and cables are ready for all required connections. ☐ Ensure that any changes that are necessary on the switch to make room for the 201i server or the MGate card (NTRB18CA) are performed before the installation date. This includes: • ensuring that two consecutive IPE card slots are available (for the 201i server) • ensuring that there are enough card slots for the MGate cards • moving lines and trunks • consolidating TNs

Required tools and materials

Ensure that the tools and materials identified in the following checklist are available. You may need to use them to perform installation, upgrade, or maintenance tasks:

Check	Item
☐	Antistatic ESD wrist strap (recommended)
☐	Various sizes of Phillips cross-head and standard screwdrivers
	Note: If your server is a tower or rackmount server, magnetic screwdrivers are recommended to prevent you from losing the screws inside the server chassis.
ATTENTION To prevent data loss, keep magnetic screwdrivers away from backup tapes, floppy disks, and hard drives.	
☐	A set of hex nut drivers
☐	Side cutters
☐	Jumper removal tool or needle-nosed pliers
☐	Tweezers
☐	Tape measure for determining cable lengths
☐	A flashlight for examining the interior of a tower or rackmount server chassis
☐	Pen for writing notes, cable lengths, and cable identifications
☐	Cable tie wraps
☐	Cable identification labels
☐	Equipment log
	The equipment log is used to record the model and serial number of the system, all installed options, and other information.
☐	Null modem serial cable (it can be useful for troubleshooting)
☐	If the CallPilot server is a 201i server, an external tape drive for the 201i server
	The tape drive is required when performing backups or restoring data from backups.
☐	If the CallPilot server is a 201i server, an external CD-ROM drive
	The external CD-ROM drive is required when installing CallPilot or operating system software.

Check	Item
☐	If the CallPilot server is a 1005r or 600r, an SLR75 external tape drive is needed. The tape drive is required when performing backups or restoring data from backups if you are not backing up to a network drive.
☐	For any server model, a monitor peripheral kit to access the CallPilot system for maintenance purposes
☐	A computer with a CD-ROM drive that is separate from the CallPilot server (such as a laptop computer) This separate computer is required for reading documentation on CD-ROM and for connecting to the CallPilot server network for troubleshooting.

Customer-supplied items checklist

Ensure that the customer has supplied the items identified in the following checklist:

Check	Item
☐	Secure location for the CallPilot server and peripheral equipment Windows and doors should be kept locked and provide access only to authorized personnel.
☐	External analog phone line for the modem The line should not be connected to the switch. If the switch goes down, the CallPilot server cannot be supported from a remote location.
☐	Web-enabled administrative PC The Web-enabled administrative PC should be in close proximity to the CallPilot server, and must have: • network connectivity to the CallPilot server (it can be on the NNS subnet or ELAN subnet) • one of the following Web browsers installed (for software versions, see the <i>CallPilot Planning and Engineering Guide</i> NN44200-200): — Internet Explorer — Netscape Communicator • a CD-ROM drive so that CallPilot documentation can be accessed from a CD-ROM • access to the Internet so that the installation technician can download software updates from Nortel, if required

Check	Item
☐	TCP/IP-based ELAN subnet that connects the switch and the server (Meridian 1 or CS 1000 only)
☐	A layer 2 Ethernet switch or hub for the ELAN subnet (or an appropriate alternative), power cord, and, if required, back-up power supply The ELAN Ethernet switch or hub is optional. You can use a cross-over network cable to make a direct point-to-point connection from the CallPilot server to the switch. If you want other devices to have connectivity to the ELAN subnet, use an Ethernet switch or hub. ATTENTION A Class A Ethernet switch or hub must be located 10 m (33 ft) away from the 703t server to comply with EMC requirements.
☐	Ethernet connections ready at the Meridian 1 or CS 1000 system (cables and Ethernet transceivers or MAUs).
☐	Cable for connecting the ELAN subnet to the customer WAN (optional). You can connect to the ELAN subnet from a remote location.
☐	TCP/IP-based NNS subnet that connects desktop or Web messaging users to the server, if the Desktop Messaging feature has been purchased. This includes any hardware or software to facilitate NNS Subnet segmentation or multiple-LAN protocols.
☐	An Ethernet switch or hub for the NNS Subnet or an appropriate alternative. ATTENTION A Class A Ethernet switch or hub must be located 10 m (33 ft) away from the 703t server to comply with EMC requirements.
☐	Jacks and a cable for connecting the CallPilot server to the NNS Subnet (optional)
☐	Web server PC, if: CallPilot Manager and CallPilot Reporter are installed on a stand-alone server CallPilot Manager is the Web-based software that you use to administer the CallPilot server. CallPilot Manager must be installed on a stand-alone Web server if you want to use CallPilot Reporter. You cannot install CallPilot Reporter on the CallPilot server.

Check	Item
	- My CallPilot is used by mailbox owners My CallPilot is a Web-based portal that provides access to CallPilot messages and mailbox configuration over the Internet. My CallPilot can be installed on the same Web server as CallPilot Manager. For information about the Web server PC requirements for CallPilot Manager and My CallPilot, see the <i>CallPilot Software Administration</i> (NN44200-600) guide.

CallPilot server hardware checklist

The following checklist identifies the hardware that you need to put the CallPilot server into operation in your network. Use this checklist (as well as the packing list provided with the customer order) to ensure that you have all the components you need.

Check	Item
Tower or rackmount server and peripheral devices	
☐	Keycode printed on a label that lists the purchased features
☐	Tower or rackmount CallPilot server The server contains the following items, which are already installed: - CD-ROM/DVD drive - hard drives - network interface cards - One or more MPB boards - SCbus cable (NTRH2011) (702t and 1002rp servers)
☐	Keyboard and mouse
☐	SVGA 14-in. monitor
☐	External Tape Drive SLR75
☐	SCSI terminator (for 600r)
☐	Modem with cable and power cord (for remote access). Note: USB modems do not require power cords.
☐	Ethernet switches or hubs, if purchased from Nortel
201i server and peripheral devices	

Check	Item
☐	Keycode printed on a label that lists the purchased features
☐	201i server
☐	Multi I/O cable (NTRH0912)
☐	EMC kit (NTRH3503)
	Note: The EMC kit is required for Option 11C Mini and CS 1000 systems only.
☐	Backplane (tip and ring) cable (NTRH3501)
	Note: This cable is required for Meridian 1 Option 51C–Option 81C systems only.
☐	One of the following groups of SCSI cables: - For Meridian 1 Option 51C–Option 81C: — NTRH1408 — NTRH1410 — NTRH3502 - For Option 11C: — NTRH1407 — NTRH3502 - For Option 11C Mini or CS 1000: NTRH3502 (two cables are required)
	Note: An NTRH3502 cable is supplied with each external SCSI CD-ROM or tape drive.
☐	MPC-8 cards to provide the number of channels purchased for CallPilot
☐	SVGA 14-in. monitor
☐	Keyboard and mouse
	Note: If you are using a USB mouse, ensure that you also have a USB-to-PS/2 converter and a PS/2 extension cable (A0855616).
☐	Modem with cables and power cord (for remote access)
☐	Ethernet switches or hubs, if purchased from Nortel
☐	External CD-ROM drive with NTRH3502 SCSI and power cables
☐	External tape drive with SCSI and power cables
Meridian 1 or CS 1000 connectivity items—rackmount server only	

Check	Item
☐	MGate cards (NTRB18CA)
☐	The following MGate cables, as required: • Single DS30XV interconnect cable (NTRH2012) (for connection to MPB16-4 boards only) • Dual DS30XV connect cable (NTRH2013) (for connection to MPB16-4 boards only) • Triple DS30XV connect cable (NTRH2014) (for connection to MPB96 boards only) Note: For more details about the MGate card cabling requirements, see the <i><switch_model></i> and <i>CallPilot Server Configuration</i> guide for your switch and server.
SL-100, DMS-100 connectivity items—rackmount platforms only	
☐	Dialogic D/480JCT-2T1 board(s)
☐	T1 cable(s)
☐	T1 card(s)
☐	SMDI link modem connection equipment (if the switch has an IOC shelf and is more than 15.2 m or 50 ft from the server): • Long-haul modems (two modems) • Modem cable for connection to CallPilot • IOC cable Note: A cable is also required to connect the two modems. Pinout information for this cable is provided in the <i><switch_model></i> and <i>CallPilot Server Configuration</i> guide for your switch and server. This cable is created or supplied by the customer or installer.
☐	SMDI link modem connection equipment (if the switch has an IOM and is more than 229 m or 750 ft from the server): • Long-haul modems (2 modems) • Modem cable for connection to CallPilot • IOM cable • Smart connector Note: A cable is also required to connect the two modems. Pinout information for this cable is provided in the <i><switch_model></i> and <i>CallPilot Server Configuration</i> guide for your switch and server. This cable is created or supplied by the customer or installer.

Check	Item
☐	SMDI Link Direct Connection equipment: • DB-9 (F) to DB-25 (F) Null Modem cable • IOC cable
☐	SMDI Link Direct Connection equipment: • DB-9 (F) to DB-25 (M) Null Modem cable • IOM cable • Smart Connector

CallPilot hardware and documentation spares checklist

The following checklist identifies the hardware components that you should carry with you as spares when you visit a customer site. Ensure that you take the components that are relevant to the server model purchased by the customer.

Check	Item	Quantity
☐	MPB96 board	1
☐	MPC-8 cards (for the 201i server)	4
☐	201i server hard drive	1
☐	1005r server hard drive	1
☐	600r server hard drive	1
☐	703t server hard drive	1
☐	1002rp server hard drive	1
☐	Network hub	1
☐	Network cable	1
☐	CallPilot image DVD (1005r and 600r)	1
☐	All CallPilot server software CD-ROMs (for a complete list, see "CallPilot software media and documentation checklist" (page 84)).	1 of each CD-ROM

CallPilot software media and documentation checklist

The software media and documentation checklist identifies the software media and documentation needed to put the CallPilot server into operation in your network. Use the checklist (and the packing list provided with your order) to ensure that you have all of the components you need.

Note: Store software media in a safe place. Use the software when instructed in the documentation. CallPilot server software is preinstalled at the factory, so you may not be asked to use some of these CD-ROMs unless you are performing a recovery, reinstallation, expansion or upgrade.

Check	Item
☐	CallPilot Image CDs or DVD — contain an image of the CallPilot software. • 201i server — three CDs • 703t — three CDs • 1002rp ELAN — three CDs • 1002rp T1 — four CDs • 1005r — one DVD • 600r — one DVD
☐	CallPilot Service Update/PEP CD-ROM: • Service Updates and PEPs • Upgrade tools (system sanity, upgrade platform validity, upgrade data validity) • Upgrade scripts
☐	CallPilot Application CD-ROM (contains applications that can be reinstalled): • CallPilot server software • CallPilot Manager and Reporter on a stand-alone Web server (installed or re-installed) • CallPilot Application Builder (installed or re-installed) • pcAnywhere • Adobe Acrobat Reader • CallPilot Directory Synchronization (installed or re-installed) • JavaRunTimeEnv (installed or re-installed)
☐	CallPilot Desktop Client software CD-ROM
☐	CallPilot My CallPilot Web-based software CD-ROM (provides mailbox access for end users)

Check	Item
☐	CallPilot language prompts CD-ROM set (three CD-ROMs): - Americas language prompts - EMEA language prompts - Asia-Pacific language prompts
☐	CallPilot Documentation CD-ROM
☐	The following printed CallPilot documentation: <i>CallPilot Distributor Technical Reference (DTR)</i>

Note: You can obtain other CallPilot documentation from the CallPilot Documentation CD-ROM or from the Installation and Administration Help area in CallPilot Manager. For more details about the available documents, see ["Related information" \(page 14\)](#).

Preinstalled software

The factory installs the operating system and CallPilot server software and third-party applications such as pcAnywhere prior to shipping the server. A disk image of this software is also shipped with the system (see the table with [CallPilot Image CD-ROMs \(2 or 3 CD-ROMs\)-contain an image of the CallPilot software. on page 113](#)).

For version numbers of the software applicable to your installation, see the *CallPilot Planning and Engineering Guide* (NN44200-200).

The following software is installed at the factory before the server ships:

- the operating system and the components required by CallPilot
- Web browser
- software for the switch-connectivity hardware
- CallPilot server software
- CallPilot Manager (Web-based administration server software)
- RAID software, if RAID is included with the tower or rackmount server
- SQL Anywhere database
- pcAnywhere
- Adobe Acrobat Reader (for online viewing of the CallPilot documentation)
- other equipment manufacturers (OEM) right-to-use (RTU) software certificates

Nortel utilizes OEM software license RTUs, and each RTU is licensed for each CallPilot application. The manufacturer provides a certificate and serial number with the RTU.

The OEM license and serial number must be kept with the CallPilot application for its entire service life. These RTU serial numbers are required for complete software reinstallation if the disk fails. If the server is replaced or decommissioned, you must return all OEM RTUs to Nortel with the server hardware.

Nortel recommends that you store all RTU certificates on-site in a secure, dry, accessible place for future access. You can store the RTU certificates in an envelope that is taped to the CallPilot server.

Cautions



CAUTION

Risk of system interruption or malfunction

Do not download and install any security patches from the Microsoft Web site or antivirus software unless they are approved for CallPilot by Nortel. Installation of unapproved security patches or antivirus software can result in the incorrect operation of your CallPilot system.

To determine which patches and antivirus software are approved by Nortel for CallPilot, see the latest issue of the *CallPilot Distributor Technical Reference* (DTR).



CAUTION

Risk of reduced system performance

Do not activate screen savers on the CallPilot server. Screen savers consume significant CPU resources and, therefore, impact CallPilot response time.

Note: CallPilot operation is not affected when you power off the monitor.

Appendix B

Configuration worksheets

This chapter contains information on the following topics:

"Overview" (page 89)

"Switch or system configuration worksheet" (page 90)

"Configuration Wizard worksheet" (page 92)

ATTENTION

The configuration worksheets should be photocopied or removed and kept in a secure place. Passwords recorded in the worksheets can be a security risk unless stored safely.

Overview

You need the information that you collect in this section when you:

- configure the switch or system
- run the Configuration Wizard on the CallPilot server

Note: Nortel recommends that you configure the switch or system and prepare the cabling before the CallPilot server installation date.

Where to get the information

Obtain this information from the switch or system administrator and network administrator.

When to use the worksheets

Use the configuration worksheets in these situations:

- when you install the server

- each time configuration changes are required as part of an upgrade, migration, or reinstallation

Switch or system configuration worksheet

Complete this worksheet as preparation for configuring the switch or system. For instructions about how to configure the switch or system, see the *<switch_model> and CallPilot Server Configuration* guide for your switch and server.

switch or system type

• Meridian 1 — Option 51C, 61C, 81, 81C — Option 11 or Option 11C Mini	See "Meridian 1 or Succession 1000 information" (page 90).
• CS 1000	
• SL-100, DMS-100	See "SL-100/DMS-100 switch information" (page 92).

Meridian 1 or CS 1000 information

Complete this section if your CallPilot server is connected to a Meridian 1 or CS 1000 system.

Customer number:	_____
Ethernet information (Overlay 117)	
Primary IP address (ELAN):	_____ . _____ . _____ . _____
Secondary IP address (ELAN):	_____ . _____ . _____ . _____
Note: A secondary IP address for the ELAN subnet is required for large Meridian 1 systems (such as Option 51C).	
Subnet mask (ELAN):	_____ . _____ . _____ . _____
Default IP gateway:	_____ . _____ . _____ . _____
Note: The default IP gateway is required only if the Meridian 1 or CS 1000 system is also connected to the NNS Subnet (CLAN).	

ACD queue and agents (Overlays 11 and 23)	
ACD DN of CallPilot agents (Overlay 23):	_____
Agent TNs (Overlay 11):	_____
Position ID on Key0:	_____

SCN on Key1: _____
Default ACD DN for CDN (Overlay 23): _____

CDN queues (Overlay 23)

Primary CDN (Voice Messaging): _____
Secondary CDN (Multimedia Messaging): _____

Phantom DNs, if used instead of dummy ACD DNs (Overlays 10 and 97)

CallPilot application name: _____
Superloop (Overlay 97): _____
Phantom DN (Overlay 10): _____
DCFW CDN: _____
CallPilot application name: _____
Superloop (Overlay 97): _____
Phantom DN (Overlay 10): _____

Phantom DNs, if used instead of dummy ACD DNs (Overlays 10 and 97) (continued)

DCFW CDN: _____
CallPilot application name: _____
Superloop (Overlay 97): _____
Phantom DN (Overlay 10): _____
DCFW CDN: _____

Dummy ACD DNs, if used instead of phantom DNs (Overlay 23)

CallPilot application name: _____
ACD DN: _____
NCFW CDN: _____
CallPilot application name: _____
ACD DN: _____
NCFW CDN: _____
CallPilot application name: _____
ACD DN: _____
NCFW CDN: _____

SL-100/DMS-100 switch information

Complete this section only if your CallPilot server is connected to an SL-100 or DMS-100 switch.

UCD DN for voice messaging:	_____
UCD DN for multimedia messaging (if purchased):	_____
UCD DN for speech recognition (if purchased):	_____
Channel configuration	
UCD DN:	_____
DN of agent:	_____
Message Desk Number:	_____
Terminal Number:	_____
Login Code:	_____
Logout Code:	_____
Service DN:	_____
Associated application:	_____
SMDI Link	
Port Name (Default: COM 2):	_____
Port Use type (Default: MM Access):	_____
Baud Rate (Recommended default: 9600):	_____
Parity:	_____
Number of Data Bits (Default: 7):	_____
Number of Stop Bits (Default: 1):	_____
Flow Control (Default: None):	_____

Configuration Wizard worksheet

Complete the following worksheet as preparation for configuring the CallPilot server. For more information about the information on this worksheet, and the instructions about how to configure the CallPilot server, see the *<switch_model>* and *CallPilot Server Configuration* guide for your switch and server.

Worksheet sections

The Configuration Wizard worksheet contains the following sections:

- "CallPilot information" (page 93)
- "Operating system password" (page 93)

- "pcAnywhere password" (page 94)
- "Multimedia allocation" (page 94)
- "Application DN information" (page 94)
- "Languages" (page 94)
- "CallPilot network information" (page 95)
- "Customer LAN access information" (page 95)
- "Meridian 1 or Succession 1000 information" (page 96)
- "T1/SMDI information" (page 97)

CallPilot information

Company name:	_____
Customer name:	_____
Serial number:	Obtain the serial number from the CallPilot keycode label.
Keycode:	Obtain the keycode from the CallPilot keycode label.
Computer name:	_____
Time zone:	_____
Country code (for the server location):	_____
Area code (for the server location):	_____

Operating system password

CallPilot uses strong passwords to increase security on the operating system accounts. Strong passwords are enabled by default. When logging on to an account or running the Configuration Wizard for the first time, you must change the password. For more information about strong passwords, see the *CallPilot Fundamentals Guide* (NN44200-100).

ATTENTION

For security reasons, do not write the passwords in this guide. Photocopy the page to record the new passwords. Store the page in a secure place.

Password type	Current Password	New Password
Account Name	default: Bvw250	

pcAnywhere password

Password type	New Password
Account Name	

For more information about changing the pcAnywhere password see:

- Step 4, Change the CallPilotDist password for pcAnywhere
- The *<switch_model> and CallPilot Server Configuration* guide for your switch and server

Multimedia allocation

DSP Encoding:	• A-law (Europe or Caribbean) • Mu-law (North America)
---------------	---

Application DN information

Voice Messaging (Primary CDN):	_____
Multimedia Messaging (Secondary CDN):	_____
Speech Activated Messaging:	_____
Express Voice Messaging:	_____
Voice Item Maintenance:	_____
Enterprise Networking:	_____
AMIS Networking:	_____
Fax Item Maintenance:	_____
Express Fax Messaging:	_____
Paced Speech Activated Messaging:	_____
Custom Commands:	_____
Interactive Voice Response:	_____
AUI CallPilot Menu Interface:	_____
AUI CallPilot Alternative Command Interface:	_____

Languages

Record the languages you need:	
Primary prompt language:	_____
Secondary prompt language:	_____

Other languages:	_____

Automated Speech Recognition languages:	_____

CallPilot network information

Embedded LAN TCP/IP Information (Meridian 1 and CS 1000 only)	
MAC address of ELAN network card on the CallPilot server (tower or rackmount servers only):	_____
CallPilot server ELAN IP address:	_____ . _____ . _____ . _____
Subnet mask:	_____ . _____ . _____ . _____

Customer LAN TCP/IP information	
MAC address of NNS Subnet (CLAN) network card on the CallPilot server (tower or rackmount servers):	_____
CallPilot server CLAN IP address:	_____ . _____ . _____ . _____
Subnet mask:	_____ . _____ . _____ . _____
Gateway:	_____ . _____ . _____ . _____

Customer LAN access information

The following information is not requested by the Configuration Wizard. However, you may need it if you connect to the CallPilot server with a PC on the Nortel Server Subnet (NS Subnet), also known as the customer LAN (CLAN).

Obtain the following from the network administrator:
Network user name: _____

Domain name:	_____
Password:	_____

Meridian 1 or CS 1000 information

Complete this section if your CallPilot server is connected to a Meridian 1 or CS 1000 system.

Switch information

Switch IP address: _____ . _____ . _____ . _____

Switch type:

- Meridian 1
- Option 11 or Option 11C Mini
- CS 1000

Switch customer number: _____

Contact Center CLAN IP Address: _____ . _____ . _____ . _____

Contact Center voice application Class ID: _____

Note: The Contact Center CLAN IP address and voice application class ID are required if you use the Contact Center Voice Services Support feature.

TN information

Note: Copy the relevant information from the ["Switch or system configuration worksheet" \(page 90\)](#).

Number of TNs: _____

Dedicated to:

- ACCESS ACD queue
- IVR* ACD queue

Note: Check one of these options if this group of TNs is dedicated to the Contact Center Voice Services Support feature.

Start TN: _____

Start TN Key 0 (Position ID): _____

Start TN Key 1 (SCN): _____

TN information (complete this section if another TN group is required)

Note: Copy the relevant information from the ["Switch or system configuration worksheet" \(page 90\)](#).

Number of TNs: _____

Dedicated to:

- ACCESS ACD queue
- IVR ACD queue

Note: Check one of these options if this group of TNs is dedicated to the Contact Center Voice Services Support feature.

Start TN: _____

Start TN Key 0 (Position ID):	_____
Start TN Key 1 (SCN):	_____

TN information (complete this section if another TN group is required)

Note: Copy the relevant information from the "Switch or system configuration worksheet" (page 90).

Number of TNs:	_____
Dedicated to:	• ACCESS ACD queue • IVR ACD queue

Note: Check one of these options if this group of TNs is dedicated to the Contact Center Voice Services Support feature.

Start TN:	_____
Start TN Key 0 (Position ID):	_____
Start TN Key 1 (SCN):	_____

T1/SMDI information

Complete this section if your CallPilot server is connected to a T1/SMDI switch or system (for example, DMS-100/SL-100).

Switch information
SMDI Transport Data Settings

Poll Timeout (Default: 10 000 ms):	_____
Poll Timeout Threshold (Default: 5):	_____
Poll DN (Default: 0):	_____
MWI Padding (Default: blank):	_____

COM Port Settings

Port Name	COM 2
Port Use type (Default: MM Access):	_____
Baud Rate (Default: 9600):	_____
Parity (Default: Even):	_____
Number of Data Bits (Default: 7):	_____
Number of Stop Bits (Default: 1):	_____
Flow Control (Default: None):	_____

T1 Board Properties

Line Interface Type (Default: Ground Start):	_____
Frame Format:	Only D4 is supported.

Note: Debounce value and Hook Flash Time units indicate 10x ms. Example: 13 indicates 130 ms.

Coding Format:	Only B8ZS is supported.
(T1) Cable Length (Default: None):	_____
Debounce Value (Default: 13):	_____
Hook Flash Time (Default: 50):	_____

Note: Debounce value and Hook Flash Time units indicate 10x ms. Example: 13 indicates 130 ms.

Channel Detail Information

UCD group for Voice channels, if Voice channels are purchased

Number of Channels (in this UCD group):	_____
Agent DN (starting):	_____
Hunt Group DN (UCD DN):	_____
Message Desk Number:	_____
Message Terminal Number (starting):	_____
Login Code:	_____
Logout Code:	_____

UCD group for Fax channels, if Fax channels are purchased

Number of Channels (in this UCD group):	_____
Agent DN (starting):	_____
Hunt Group DN (UCD DN):	_____
Message Desk Number:	_____
Message Terminal Number (starting):	_____
Login Code:	_____
Logout Code:	_____

UCD group for Speech Recognition channels, if Speech Recognition channels are purchased

Number of Channels (in this UCD group):	_____
Agent DN (starting):	_____
Hunt Group DN (UCD DN):	_____
Message Desk Number:	_____
Message Terminal Number (starting):	_____
Login Code:	_____
Logout Code:	_____

Nortel CallPilot

Installation and Configuration Task List

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